Axmed™
Global Health
Advisory

Why the New Normal In Global Health Requires A New Access Model

Axmed Global Health Advisory

Isabelle Ormsby | Associate
Jean Du | Engagement Manager
Temitope Coker | Principal, Global Health Launch Strategy
Liz van Erp | Partner, Corporate Strategy
Felix Ohnmacht | Senior Partner
Emmanuel Akpakwu | General Partner

Table of Contents

01 Introduction

02 Access by Design:
The Access360© Framework

03 The Structural Gap
Between R&D and Access

04 The Promise of the Axmed Access360©
Framework in Global Health

Introduction

Imagine a breakthrough: a vaccine for a disease that has long evaded prevention; a treatment for a neglected tropical disease; or a simplified oral therapy that replaces a complex hospital-based regimen. Each represents the kind of scientific progress the global health community has worked towards for decades.

These innovations are often developed with a clear intent to reduce the burden of disease in low- and middle-income countries (LMICs) most affected. Yet there is a persistent disconnect: **Scientific success does not reliably translate into patient access.**

Many products that are designed with global equity in mind still take years to reach the populations they were intended to serve. In some cases, they do not reach them at all, or only at limited scale. Across vaccines, innovative therapeutics, and new formulations, the same issue appears: we see sizeable investments in clinical development, but patient reach is often delayed or minimized.

In a world where funding for the delivery of global health innovations is diminishing, it is more important than ever, to be laser focused on the true determinants of access.

This led us to dig deeper into the root cause: Why does innovation so often stall at the point where it should begin to deliver impact and what can be done to unlock access more broadly?

The Structural Gap Between R&D and Access

A large share of global health investment is optimized for scientific discovery. While this leads to much-needed innovations, the system is underinvested in the conditions required for delivery. For many product teams, the implicit endpoint is Phase III completion or initial regulatory approval. This is a structural imbalance: access considerations are often an afterthought and the expertise brought in much too late.

Every delayed launch and every underutilized product is caused by the design of the current system.

What is missing is a model that connects the ambition with internal capabilities and market reality - before the point of no return. **When access is framed as a clear, actionable strategy, not just a complexity, it leads to accountability at the right level.**

The different expertise needed for launch & access planning compared to research & development creates a structural challenge. R&D teams treat access as a downstream execution step, rather than a core design parameter that has to be kicked off in parallel to the development process.

In practice, access depends on a set of interconnected decisions *(Figure 1)*:

01 **Portfolio:** Which markets to prioritize and in what sequence?

02 **Geography:** How to navigate access and regulatory approval across geographies?

03 **Channel Strategy:** Which channels (private, public, or a mix of both) to activate to reach patients where they are at?

04 **Delivery Models:** How supply chains will reach last-mile settings?

05 **Financing & Pricing:** What pricing and financing models will support both affordability and sustainability?

06 **Partnerships:** Which partnerships are required to enable delivery at scale?

The decisions referred to in Figure 1 are not independent from the R&D process. They shape each other, and they shape the feasibility of reaching patients. When they are not addressed early, they become bottlenecks later. By the time Phase 3 trials are being planned, key access choices have already been made by default: where trials run, how evidence is generated, what data will be available for regulators and payers in priority markets.

An access strategy developed after Phase 3 is working around constraints that an earlier strategy could have avoided. A first version of the Access strategy needs to be in place before late-stage development begins, so that trial design and access planning reinforce each other rather than pull in opposite directions.

Access by Design: The Access360© Framework

At Axmed Global Health Advisory, we have worked alongside many organizations that have achieved significant scientific progress but face uncertainty in translating that progress into patient reach. We see a common pattern emerge: the closer teams get to approval, the more complex and fragmented the access challenge becomes. It reflects the absence of a structured approach that brings these elements together.

This is the context in which we developed the unique and proprietary **Axmed Access360© Framework.** The framework is designed to move beyond isolated access activities and instead provide a structured way to connect ambition, internal readiness, and external realities into a coherent go-to-market strategy. It guides organizations from ambition toward tangible patient access in LMICs: ensuring that innovations reach priority populations sustainably, at a price that patients and health systems can afford.

1 The circular framework starts with clearly defining the Access Ambition at the outer layer. *Figure 2*

Although an often-overlooked step, it is crucial to align the organizational access ambition and patient access goal and set the scope and success measures. A well thought-through ambition is the foundation to each strategy and should be aligned across key stakeholders before any further work is started.

Within the circle representing the Access Ambition, the framework is divided in six 'wedges'. Each piece within the circle represents a key access lever of the go-to-market (GTM) strategy:

Where to Play?

- Prioritize high-impact assets
- Target priority markets

How to win?

- Shape effective channel strategies
- Design scalable delivery models
- Develop sustainable financing and pricing approaches
- Forge strategic ecosystem partnerships

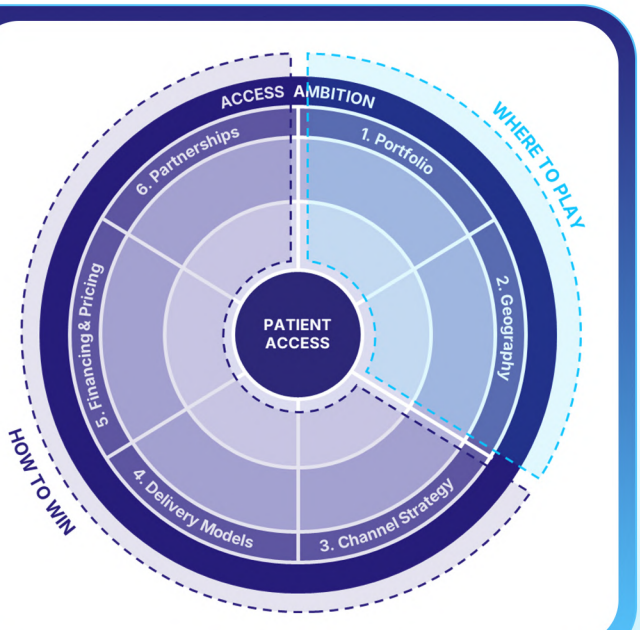


Figure 2: The first step of the Access360© framework defines a clear Access ambition that guides organizations to tangible patient access at the center.

2 The next layer towards the center of the framework, is the internal diagnostic.

Figure 3

We go structurally through each of the six access levers to perform a diagnostic which lays out the internal realities of the organization, by determining what is already in place and identifying where the key gaps lie across each lever, as well as any interdependencies.

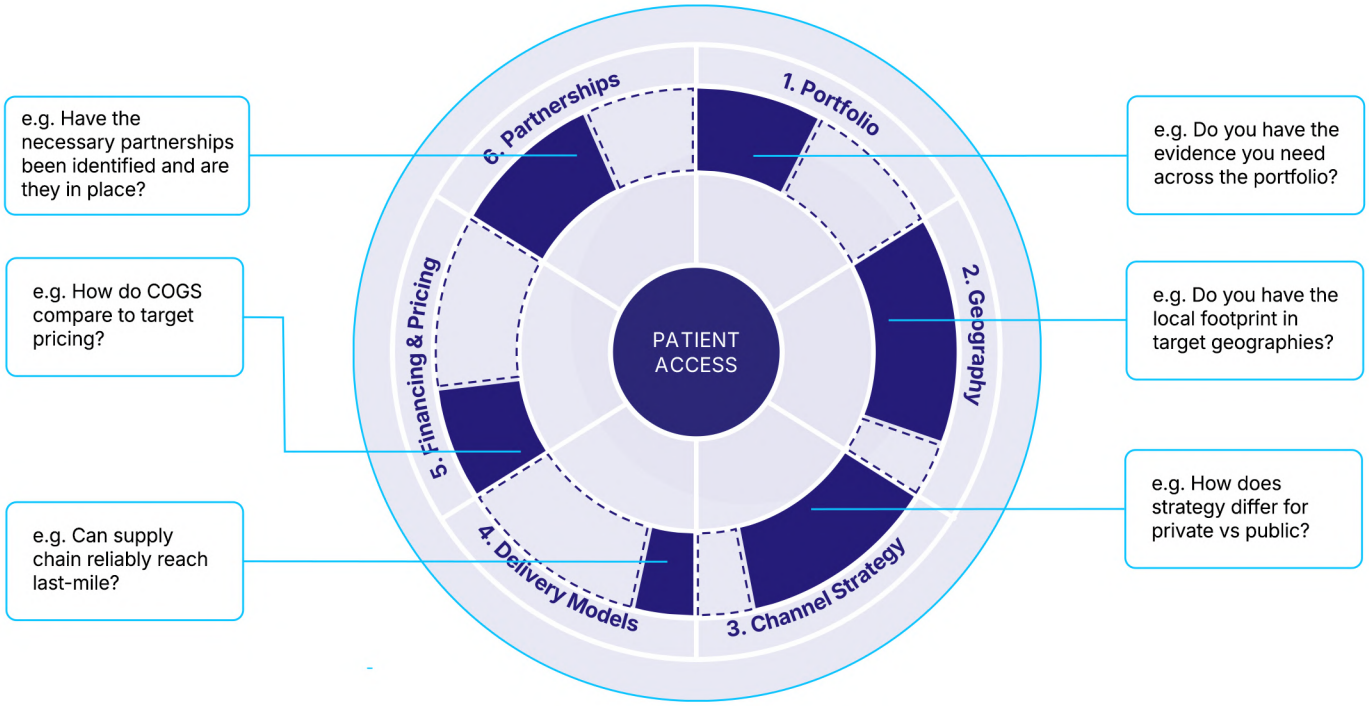


Figure 3: The second step of the Access360© Framework: Strategic inputs from the organization across all six access levers are used to inform a robust diagnostic of the internal landscape

3 A commonly made mistake is to only look at internal traits, without factoring in external realities.

External challengers and enablers are as important to shape a robust go-to-market strategy and represent the next step in our model.

Figure 4

Based on the existing internal diagnostic, the unique set of external challengers and enablers are assessed that shape the go-to-market strategy across the six access levers, from regulatory and financing bottlenecks to partnership gaps and delivery constraints.

Access depends on alignment across multiple actors, including manufacturers, governments, donors, regulators, and delivery partners. Each market has its own constraints and enablers. Regulatory timelines differ. Financing mechanisms vary. Health system capacity is uneven. Private and public channels operate in parallel, often with limited coordination.

A one-size-fits-all approach does not work in this context. All abovementioned internal and external factors interact. If the goal of drug development is to reduce disease burden, then the external environment cannot be treated as an afterthought. Without a structured way to assess and align these realities, access remains uncertain, regardless of the strength of the underlying innovation.

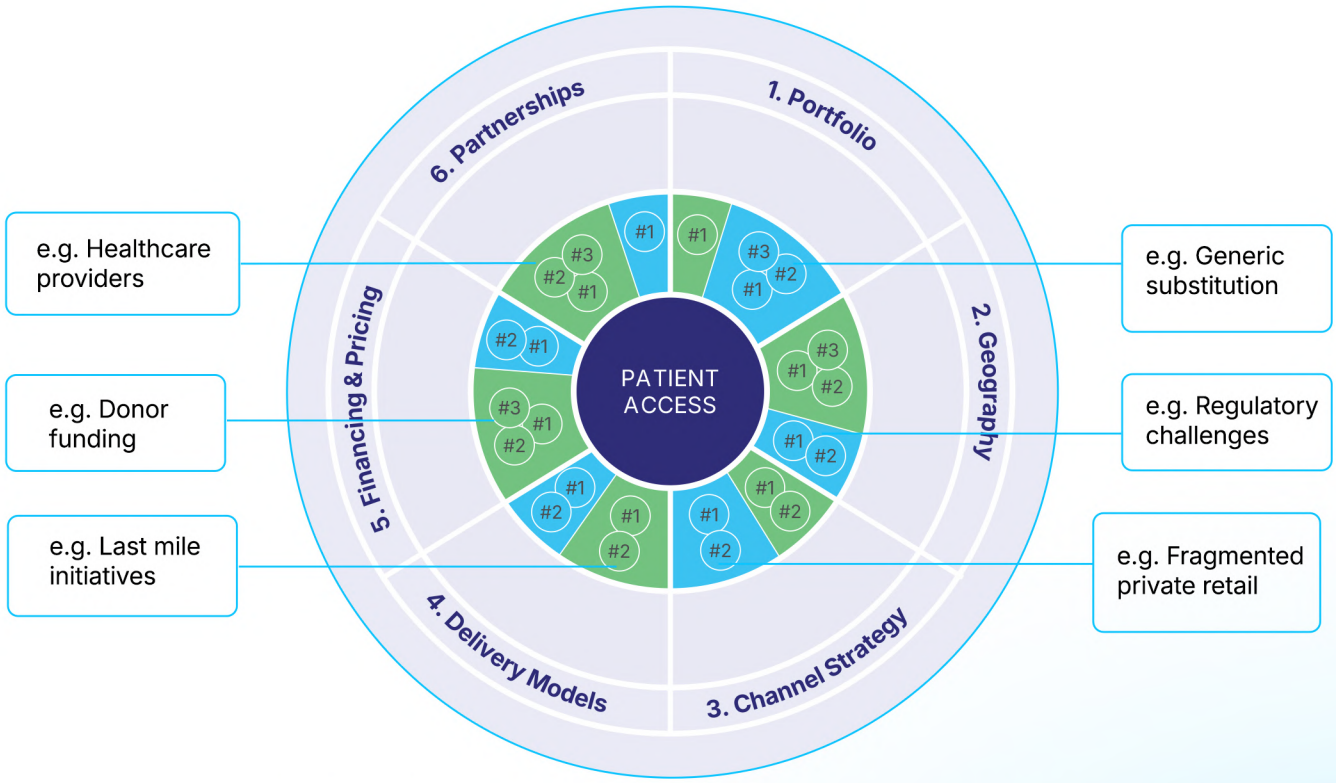


Figure 4: The third step of the Access360© Framework: assessment of the unique set of external challengers and enablers shaping the go-to-market strategy across each access lever

A New Normal Requires A New Model

4 **Through its stepwise approach, the Access360© framework guides organizations in a structured process from ambition to tangible patient access**

Figure 5

The tailored assessment aligns ambition, internal scope, and market realities, positioning the portfolio for impact, sharpening existing strategy, and laying the foundation for a go-to-market strategy grounded in internal priorities and local realities.

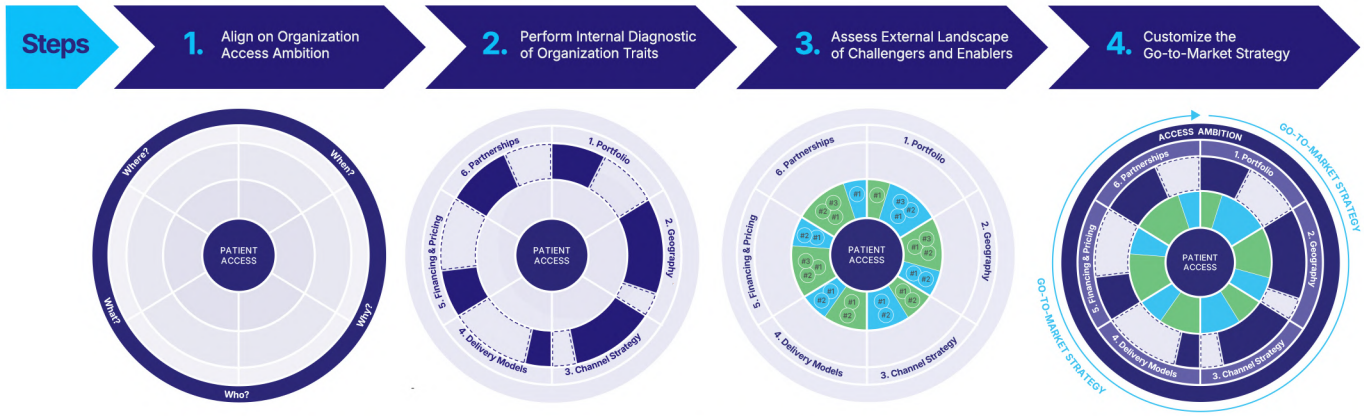
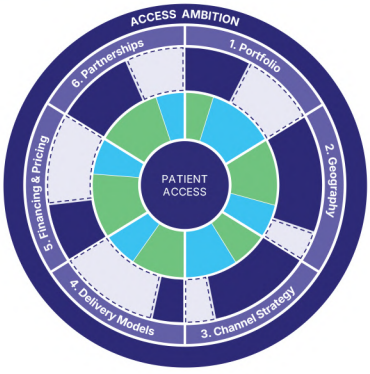


Figure 5: Overview of the stepwise Access360© process

The four foundational steps together lead to an Access360© Fingerprint, which is a distinctive pattern representing challengers and enablers across markets, in combination with the internal setup of an organization.

The Access360© Fingerprint is unique per organization and provides clarity on what is required to move from innovation to impact, and where the key gaps and constraints lie.



The Access360© Fingerprint

The unique configuration of access challengers and enablers, in combination with your internal set-up, used to design your unique GTM Strategy.

The Promise of the Axmed Access360© Framework in Global Health

Global health innovation is entering a phase where the pipeline is stronger, more targeted, and more aligned with unmet need than before, but with an access environment that is increasingly difficult to navigate. However, with the right tools, these challenges can be addressed.

The Access360© framework has been built in response to the current access environment. By embedding access as a design principle rather than a downstream task, it gives organisations a structured way to move from ambition to delivery.

It connects internal capability to market reality. It surfaces the decisions that need to be made early, when there is still room to make them well.

The potential this unlocks is significant. If the products currently in late-stage development for LMICs reach patients at the scale the science warrants, hundreds of millions of people could benefit in the coming decade. We already have the innovations, now the question is whether we are willing to build the strategies that allow them to reach the people who need them.

Whether you are building an LMIC access strategy from the ground up, strengthening one already in motion, or want to stress-test a strategy before you commit to it, our team can help.

Connect with us at

advisory@axmed.com

to explore what Access360© could unlock for your organization.

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