COVID-19 and the great reset: Briefing note #40, January 27, 2021

Vaccine rollout has run into problems. Our new research explores where and why.
McKinsey research intently continues to examine the progress of SARS-CoV-2 vaccine development and distribution. Last week, we updated our series on the end of the pandemic to consider the emergence of new strains of the virus and a slow start to vaccine rollout. Both represent serious threats to the timetable. This week, we looked more closely at the problems in vaccine distribution. We start by mapping the operating path, from raw materials to post-vaccination care (exhibit). At every step, risks and challenges are emerging. But so too are collaborative approaches that can help countries achieve herd immunity.

The pandemic has been a tough, real-life stress test for government disbursement schemes, highlighting not only opportunities but also gaps and vulnerabilities. Our new research across 12 countries shows both. One key finding: getting aid to those who need it is greatly bolstered by digital payment channels, a basic digital identification system used by most people, and simple data on individuals and businesses that are tethered to that digital ID.

Gone but not forgotten: in the crisis, global CO₂ emissions briefly plunged, then resumed. Today, as economies rebuild, the climate challenge is again top of mind. For a new report published this week, we teamed up with the World Economic Forum (WEF) to examine natural climate solutions. Simply put, these are techniques to increase carbon storage and avoid emissions—through better conservation, restoration, and management of our priceless natural resources. There is no clear path to mitigate the damaging effects of climate change that doesn’t include natural climate solutions. The case is complete when you consider the urgent need to slow the destruction of the natural world. (We’re also collaborating with WEF on the Davos Agenda, the first of two events being held in place of its usual annual meeting.)

Also this week, we looked at procurement in the next normal, the greatly exaggerated rumor of the death of the vending machine in Japan, the dramatic shifts in sporting goods over the past year, and the rising value of industrial brands.
A map of the COVID-19 vaccine operating path can track data, locations, and risks for all stakeholders.

Common operating path for delivering COVID-19 vaccines (US example)

1. **Emergent threat**
   - **Critical supplies**
     - Upstream process materials
     - Downstream process materials
     - Fill and finish packing materials
   - **Manufacturing**
     - Vaccine manufacture (drug substance and product)
   - **Regulatory**
     - Emergency use authorization approval
   - **Data path**
     - Inventory management including fraud prevention
     - Allocation among US states

2. **Emergent threat**
   - **Logistics**
     - Pending vaccine modality
     - Central storage
   - **Last-mile logistics**
     - Transport to administration site or local warehouse
     - Transport to final site (if <100 doses)
   - **Point-of-care operations**
     - Capacity assessment including cold chain, human resources
     - Vaccine administrator assignment or recruitment
   - **Dry ice**
   - **Ancillary supplies**
   - **Allocation among sites**
   - **Local storage**
   - **Redistribution of doses among sites, if needed**
   - **Training development**
   - **Patient scheduling**
   - **Onboarding and upskilling**

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**Notes:**
1. Centers for Disease Control and Prevention.
2. Biomedical Advanced Research and Development Authority.
Source: CDC and US Food and Drug Administration literature; McKinsey analysis
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Common operating path for delivering COVID-19 vaccines (US example)

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Emergent threat

Point-of-care operations
- Handling, thawing, and diluting processes
- Reuse of protocols (if needed)

Administering
- Access to site
- Consent
- Provider recommendation

IIS¹ and VAMS² registration
- Vaccine need estimation
- Real-time data tracking
- Order entered in IIS or VTrckS³
- Additional ancillary supplies
- IIS synced into VTrckS
- Dose administered
- Patient record
- Patient record and immunization card

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Emergent threat

Provider and public adoption
- Healthcare worker education
- Provider recommendation
- Patient query immunization (IZ) gateway
- Out-of-state record and synchronize IIS
- Patient communications and outreach
- Public communications and outreach

Postvaccination
- Postvaccine support
- 2nd dose scheduled
- 2nd dose administered
- Adverse events recorded in VAERS
- Adverse events recorded in VTrckS

State demand
- In the US, much of the local administration of the vaccines' program will be coordinated by the states
- Order approved by state
- Population prioritization
- Site onboarding
- Site selection
- Patient location

Most critical risk areas
Wastage at points of care
- Patient record
- Patient record and immunization card

Most critical risk areas
IT challenges

¹Immunization information systems. ²Vaccine Administration Management System. ³Vaccine Tracking System. ⁴Vaccine adverse event reporting system.
Source: CDC and US Food and Drug Administration literature; McKinsey analysis
With vaccinations underway, executives everywhere are thinking about the critical next months of the pandemic. Start with the McKinsey Download Hub to find McKinsey’s latest research, perspectives, and insights on the management issues that matter most, from leading through the COVID-19 crisis to managing risk and digitizing operations. Also consider our special collection The Next Normal: The Recovery Will Be Digital. The first four installments—a 172-page report on technology and data transformation, a 130-page report on the path to true transformation, a 206-page report on reimagining the postpandemic organization, and a 157-page report on the challenge of climate change—are available now. The final installment is coming as part of Our New Future, a multimedia series we created with CNBC.

You can also see the full collection of our coronavirus-related content, visual insights from our “chart of the day,” a curated collection of our first 100 articles relating to the coronavirus, our suite of tools to help leaders respond to the pandemic, and how our editors choose images that help readers visualize the impact of an invisible threat.