

Cell & Gene Therapy Landscape

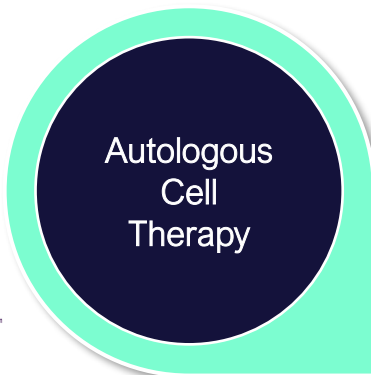
CGT Overview of Biopharma Companies

Company	Marketed
bluebirdbio	3 assets
NOVARTIS	3 assets
Bristol Myers Squibb	2 assets
GILEAD	2 assets
ATARA BIO	1 asset
B:OMARIN [®]	1 asset
CSL Behring	1 asset
Dendreon	1 asset
IOVANCE BIOTHERAPEUTICS	1 asset
Johnson & Johnson	1 asset
SAREPTA THERAPEUTICS	1 asset
VERTEX	1 asset

Companies with Pre-Clinical & Clinical Stage Assets

Types of Cell & Gene Therapies & Marketed Assets

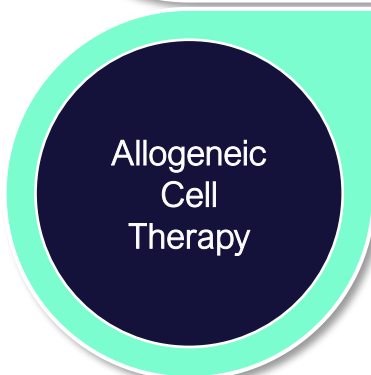
Examples Include:



Examples Include:



Examples Include:



Examples Include:



Differentiated CGT Access Threats by Product Type

Key Access Threats		Autologous Cell Therapy	Ex-vivo Gene Therapy	Allogeneic Cell Therapy	In-vivo Gene Therapy
Longer manufacturing time with potential for treatment delays		✓	✓	×	×
High coordination across treatment journey may strain resources		✓	✓	×	×
Longer inpatient stay may result in higher costs		✓	✓	×	×
Potential for significant AEs associated with conditioning therapy		×	✓	×	×
Potential need for HLA / batch matching may limit eligibility		×	×	✓	×
Inpatient & outpatient infrastructure development may be needed		✓	✓	✓	✓
Use limitation to university hospitals despite local hospital potential		×	×	✓	✓
Ancillary services increases complexity of planning & financials		✓	✓	✓	✓
Limitations in patient affordability may limit uptake across centers		✓	✓	✓	✓

CGT Market Access Complexities Require Unique Commercialization Approaches



Provider Site Activation & Engagement

Greater MFR - hospital - payer collaboration, resource consumption & cross-department coordination



Market Access & Reimbursement Strategy

Increasing payer CGT expertise, management sophistication & cost containment priorities



Novel Distribution & Support Models

New supply chain infrastructure & expanded access support



Coordinated Commercial Operations

Increased infrastructure, cross-functional roles, points of communication, training & resource needs

CGT Commercial Strategy Needs to Optimize Capture At Launch



Provider Site Activation & Engagement

- Indication landscape & patient journey mapping
- Clinical trial & launch site selection & prioritization
- Value drivers, operations & training needs for use
- Provider site economics & sources of sensitivity



Market Access & Reimbursement Strategy

- Analog management, including by indication & product type
- TPP testing, access implications & data opportunities
- Billing scenarios & policy gaps to address
- Pricing & contracting strategy, including payment models



Distribution & Patient Support Models

- Analog distribution, order fulfillment, tech platforms & services model benchmarks
- Patient support services needs & strategic choices



Commercial Operations Infrastructure

- Analog commercial activities & success benchmarking
- Commercial model implementation playbook
- Matrix team coordination and responsibility mapping
- Customer-facing field roles, responsibilities & resources

Presenter Summary



Pooja Rana

Senior Consultant, Cell & Gene Therapy Strategy

Email: Pooja.Rana@dedhamgroup.com

- Pooja Rana, MPH has extensive experience in commercialization and lifecycle management consulting for specialty and complex therapeutics across categories including cell and gene therapy, oncology, and rare disease. Key areas of expertise include distribution & procurement model strategy, reimbursement and therapy economics modeling, site selection and certification approach, provider site training and activation planning, commercial infrastructure planning (e.g., order fulfillment modeling), and therapy launch monitoring.
- Pooja studied cell biology & neuroscience during her bachelor's degree at Rutgers University and graduated with a master's degree in public health from Yale University.