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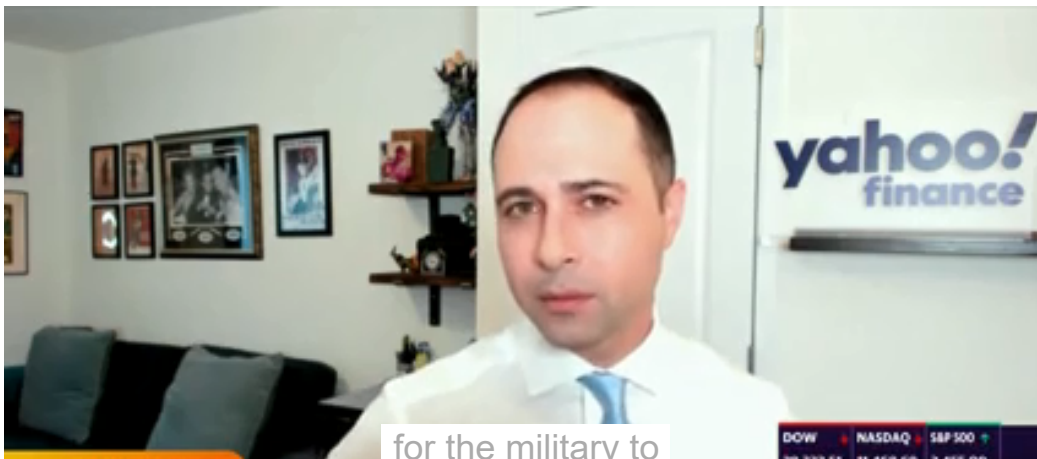
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S&P 500 3,557.54 -24.33 (-0.68%)	Dow 30 29,263.48 -219.75 (-0.75%)	Nasdaq 11,854.97 -49.74 (-0.42%)	Russell 2000 1,785.34 +1.21 (+0.07%)	Crude Oil 42.17 +0.43 (+1.03%)	Gold 1,869.60 +8.10 (+0.44%)
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Genpact CEO on COVID-19 vaccine distribution

October 23, 2020

Yahoo Finance's Alexis Christoforus and Brian Sozzi discuss the logistics and complications of distributing a COVID-19 vaccine with Genpact CEO, Tiger Tyagarajan.

Video Transcript

BRIAN SOZZI: So walk us through this. How simple is it for the-- for the military to distribute a vaccine?

TIGER TYAGARAJAN: Brian, it's great to be on the show. Let's talk about what it takes to distribute vaccines, and we can go through the various pieces of it. First of all, they're talking about billions, because they're talking about a vaccine that has to ultimately solve the problem across the world.

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about a vaccine that has a supply chain that's pretty complicated.

Some of these vaccines need cold storage of minus 80 degrees Fahrenheit, if they need intermodal transport and multimodal transport.



If they're going to cross borders, then they would need customs and all of that. I mean, this is-- and of course, the vaccine has to be effective right through that supply chain to the end. And then what happens in the end? Administration requires more than just self-administration. It often requires some help. So it's much more complicated than many other distributions.

ALEXIS CHRISTOFOROUS: Tiger, what-- which companies, which technologies will help with the supply chain with getting the vaccine into the right hands? And I'm looking at it from the perspective of an investor who may be seeing this as an entry point opportunity.

TIGER TYAGARAJAN: That's a great question, Alexis. And I think there many, many people who come together in an ecosystem to solve something like this. That actually is part of the reason it actually becomes pretty complicated.

So first of all, you have demand volatility, which is you still don't know exactly where you really want to distribute on day one, day two, day three, day four. And that includes countries as well. Obviously, we're right now talking about domestic US distribution, but even here, so that's demand volatility.

The second is, let's focus on demand first. There's still probably half the population that is saying that they will not immediately jump and take a vaccine. That creates its own complication. And then let's talk about supply. I would say information is probably one of those areas and ability to respond on where exactly in the supply chain is what vaccine, monitoring temperatures.

So companies that are focused on data, on monitoring data, on using things like IoT to monitor data, tracking through the supply chain, you know, every package and where it is, you know, companies that actually become the inputs into the vaccine. I'm going beyond now just a supply chain. You know, the syringe makers, the people who are part of the distribution chain of things like a vaccine. And this is not going to be a short-term phenomena, right. You're talking about a vaccine that's probably going to be distributed, you know, I don't know what the math is, but the math would say for a year and plus and more.

BRIAN SOZZI: Tiger, we've talked to you many, many, many times in the past, and the one thing we've learned is that your company sits



are you-- what are you hearing from customers?





TIGER TYAGARAJAN: Brian, I don't know if I would call it a pause. I think what I would say is there is a pause in terms of ability to have visibility beyond a few months, and that is connected to so many things. One, what happens if the stimulus doesn't really continue to reach people's hands? At some point, if-- if employees who are on furlough are not knocked on full employment, if companies decide that they ultimately will have to downsize those, what happens to that and the ripple effect of that?

Second is, you know, the shift to online is pretty dramatic, and I don't think people have clarity on how much of that will come back to the way traditional business as usual used to be. My own perspective, and our own perspective, is some will, but a lot of it won't, so this online trend is real.

And the third is, what does it mean to run a company differently in that new, new normal? Where is work going to be done? I don't think all of us are going to come back to offices fully. But it's not true that we all are going to be happy working from home. I'm sure all of us would like to come together and innovate.


So what mixture is it going to be? So there are so many unknowns here that I think the reaction most people would give is I don't know. And therefore, agility becomes probably the most important thing. And the other thing would be analytical prediction, and insights, and forecast. So if you have I can forecast tomorrow and I'm agile enough to respond, that's a good combination to have.

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