Procurement and Market Shaping: Key Progress and Planned Shifts for Grant Cycle 8

55th Board Meeting
9 – 10 July 2026, Geneva, Switzerland
GF/B55/06

Executive Summary [1/3]

Context

1. The Board is receiving this procurement and NextGen Market Shaping update as part of the annual reporting requirement for these critical activities contributing to the Global Fund's mission and strategic objectives. The Global Fund continues to drive value for money through its procurement activities, focusing on effectiveness, efficiency and stewardship.
2. The Global Fund leverages its procurement scale and operating model and, through its NextGen Market Shaping approach, improves access to quality-assured, affordable health products and innovations through a set of interlinked market shaping interventions. These include accelerating new product introductions, building capacity for regional manufacturing and procurement and supply chain strengthening.

Questions addressed in this slide deck

A. What were the key procurement activities and related progress in 2025?

B. What were the main NextGen Market Shaping achievements in 2025 and considering GC8 Strategic Shifts, how has the NextGen Market Shaping approach been refined to sustain and strengthen progress?

C. How does scaling up non-Global Fund-financed procurement support sustainability and country transitions, and what changes are needed to accelerate scale-up?

Executive Summary [2/3]

Conclusions

A. In 2025, more than 80 countries placed purchase orders worth US$1.02b through the Global Fund's Pooled Procurement Mechanism (PPM), including initial orders of lenacapavir PrEP, a novel, highly efficacious HIV prevention tool. The Secretariat also managed US$176.6m in procurements funded by OPEX, Strategic Initiatives and C19RM, nearly 70% of which was for Professional Services and Local Fund Agent services/travel. The Operational Framework for implementing the Procurement Policy was rolled out in April 2025 to continue to drive effective, efficient and compliant procurement activities performed by the Secretariat.

B. Global Fund continues to leverage its unique market shaping position through the pooled procurement, country- and communities-led demand generation and complementary partnership efforts for accelerating innovations to market and introducing new products at scale, fostering regional procurement collaboration and advancing on building resilient supply chains. Building on progress to date, Global Fund's NextGen Market Shaping approach has been updated with the GC8 Strategic Shifts to maximize outcomes and impact and support sustainability and transition pathways. Strategic priorities include: (i) shaping innovation and accelerating health product introductions at scale; (ii) promoting regional capacity building for manufacturing and collaborative procurement; (iii) sustaining healthy markets and driving sustainable, efficient, resilient supply chains; and (iv) accelerating the scale-up of non-Global Fund-financed procurement.

Executive Summary [3/3]

Conclusions [continued]

C. Accelerating non-Global Fund-financed procurement offers a complementary option for countries using co-financing and domestic resources to access quality-assured and affordable health products, retain scale synergies to sustain healthy markets and innovation pipelines that will help to end the three diseases. In a separate paper (GF/B55/05), the Board is requested to consider updates to the approach approved in 2022 for non-Global Fund-financed procurement. These updates are presented through a Non-Global Fund-financed Procurement Policy and an accompanying financial management framework, informed by recommendations of the Strategy Committee and Audit and Finance Committee. The proposed approach strengthens key policy elements, including an expansion of the definition of eligible buyers and a financial management framework to enable the scaled use of the mechanism in support of sustainability and transition pathways.

Input Received – SC30 recognized progress made under the NextGen Market Shaping framework and raised the need to strengthen in-country supply chain resilience and country ownership; the importance of prioritizing innovations and market shaping interventions that maximize outcomes; and the continued partnership efforts on regional manufacturing for supporting long-term sustainability. AFC30 emphasized the importance of achieving value for money through procurement, appreciated the update on mitigations related to the Middle East crisis and noted partnership efforts that contribute to procurement outcomes.

Input Sought – The Board is requested to provide guidance on ongoing procurement and market shaping activities, in line with Grant Cycle 8 shifts and beyond.

Contents

A Procurement Overview and Update

The Global Fund continued to drive value for money through its procurement activities, focusing on effectiveness, efficiency and stewardship

In 2025, the total procurement value managed by the Secretariat amounted to ~US$ 1.2Bn. This is a decrease from last year, in line with the reduction in C19RM, grant-cycle budget fluctuations and the reprioritization exercise in mid-2025.

Pooled Procurement Mechanism[1,2]

US$ 1.02B

Procurement support for grant implementation by Principal Recipients to access affordable, quality assured health products

Other Procurement[3,4]

Operating Expenses

US$ 99.8M

Goods and services required for the Secretariat's operations

Strategic Initiatives

US$ 65.3M

Services required to operationalize Strategic Initiatives

C19RM

US$ 11.5M

Services required to implement the key C19RM interventions

[1] Whilst PPM/wambo.org is the largest procurement channel for health products using grant funds accounting typically for 50-60% health product procurement depending on product category, other procurement channels include national procurement and, procuring through other international and regional procurement mechanisms, such as UNDP (primarily when PR), GDF, UNICEF and PAHO.

[2] Value of confirmed purchase order in 2025. Includes product and procurement and supply management costs to country. Prior to delivery, includes Purchase Order value. Post-Purchase Order closure, includes final invoiced value. Procurement through PPM does include some non-health product procurement, e.g., vehicles, information technology, etc.

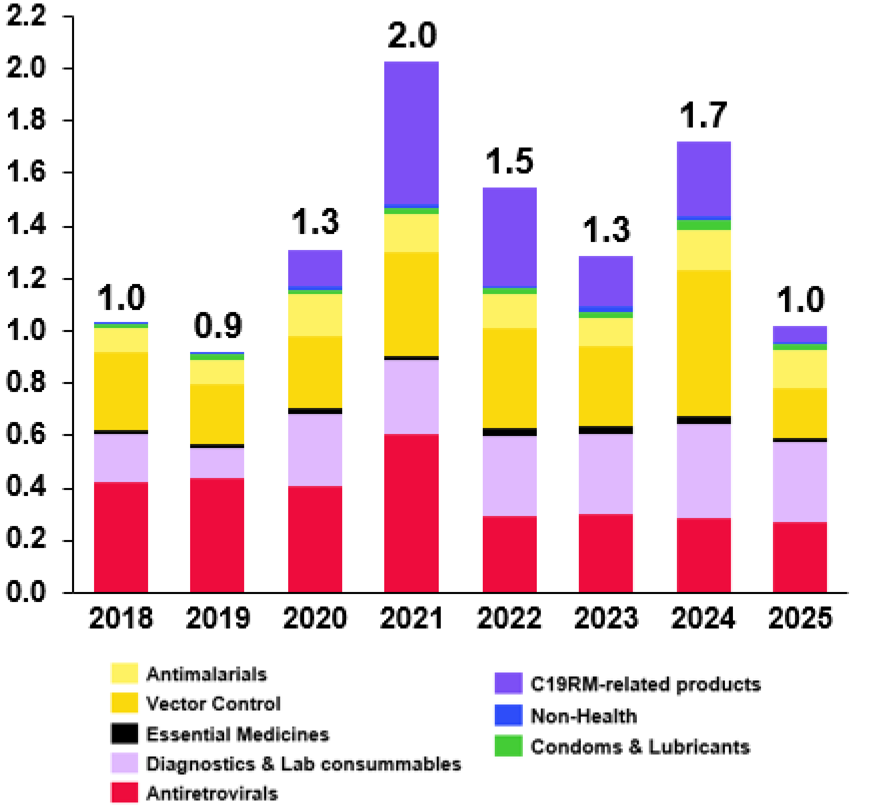
[3] Procurement value relates to the value of Purchase Orders issued in 2025. Not related to invoiced amounts or expenditure. For procurement activity that secured multi-year value, the full value of the Purchase Order issued is included, even if expenditure will occur over several years. Data downloaded on 4 March 2026 using spot rates for non-US$ currencies.

[4] This is exclusive of co-financing, which had a 2025 procurement value of US$ 9.1M, almost exclusively for Professional Services, Human Resource services and Travel.

In 2025, US$ 1.02B in approved purchase orders was for health products ordered by Principal Recipients through PPM/wambo.org[1]

Procurement by Category[1]

[in US$M, Pooled Procurement Mechanism]



[1] Value of confirmed grant-funded purchase orders. Includes product and procurement and supply management costs to country. Prior to delivery, includes Purchase Order value. Post-Purchase Order closure, includes final invoiced value. Note that this is exclusive of most TB volumes (i.e., all TB medicines and most TB diagnostics), which are procured through the Stop TB Partnership's Global Drug Facility (GDF). Differences with audited financial statements are due to different cut-off dates.

Global Fund's Pooled Procurement Mechanism / wambo.org

PPM procurement consistently adheres to the core principles of the Policy, including **Value for Money, Effective Competition, Fairness, Impartiality, and Integrity, Client centricity, Sustainable Procurement,** and **Best interest of the Global Fund.**

Through the mechanism, Principal Recipients can place orders for the health products they need to implement their programs. Eligible buyers can also place orders for health products with non-Global Fund finances; that data is reported separately (see next slide).

Of the US$ 1.02B value of grant-funded health product procurements in 2025, 70% was transacted through Global Fund-managed long-term performance-based framework agreements with suppliers. The remainder 30% was managed by Procurement Services Agents and partner organizations, in line with the Procurement Policy.

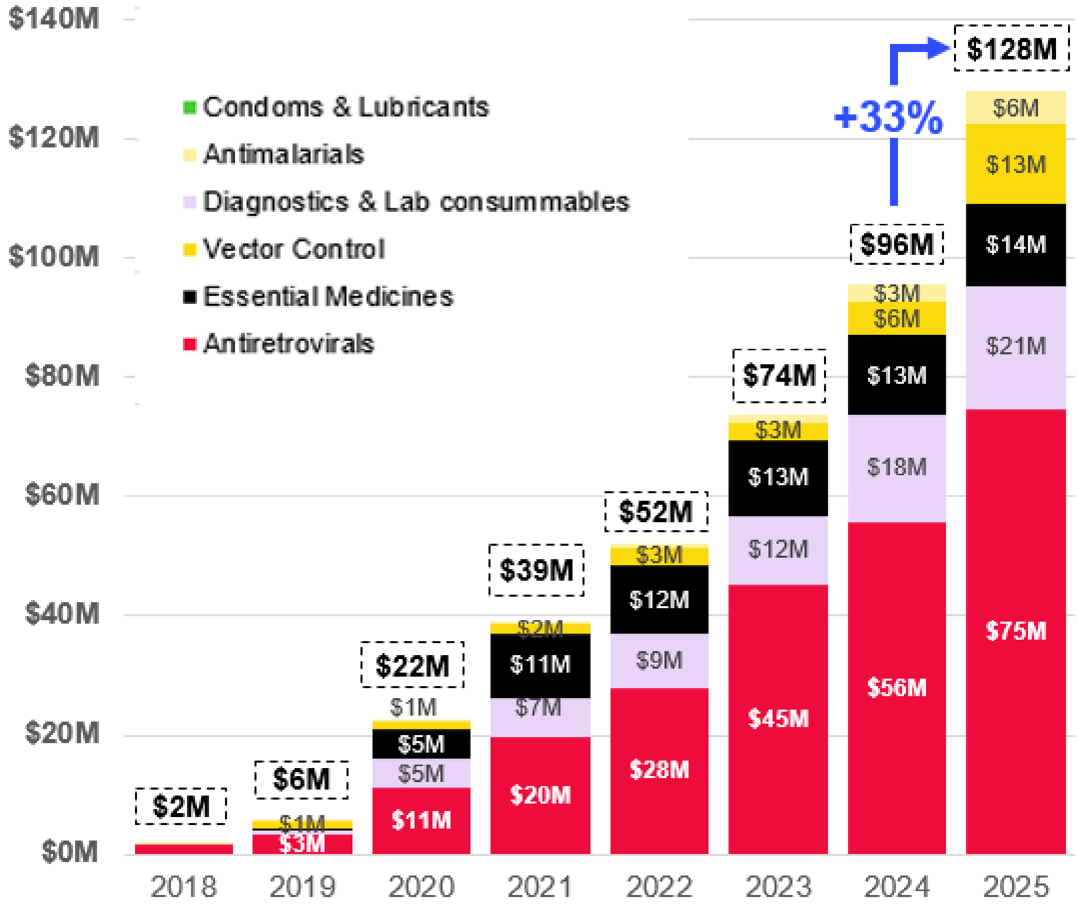
Key changes vs. 2024, include:

1. While the total value decreased by 43% from US$ 1.78B in 2024 to US$ 1.02B in 2025, this fits a typical grant cycle pattern where Year 2 of a grant cycle often includes less health product procurement than in Year 1. It is also in line with grant budgets for the period including after the reprioritization exercise in mid-2025.
2. It is further explained by a reduction of more than 75% of the 2024 spend for C19RM-related products, with 2025 the final year for C19RM.
3. Both the value and share of vector control decreased in 2025 relative to 2024. This is linked to guidance to countries to place dual ai ITN orders for 2025 in 2024 to secure scarce capacity in the first couple of years of scale up.
4. Although a reduction in absolute values from 2024 to 2025, the share of antimalarials, antiretrovirals and diagnostics and lab consumables increased in 2025, likely linked to points 2 and 3 above.

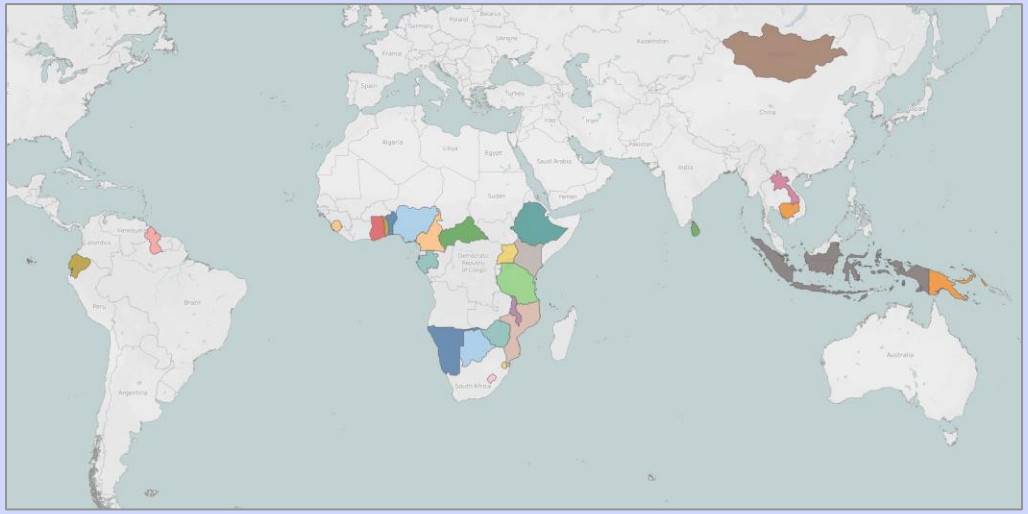
[Additional information in Annex 1]

Since 2018, 30 countries have procured US$ 128 million of health products with non-Global Fund resources through PPM/wambo.org

Cumulative spend by product category over time[1,2]



[1]Product and procurement and supply management costs to country, as of end December 2025. Prior to delivery, includes Purchase Order value. Post-Purchase Order closure, includes final invoiced value.
[2]In 2024, orders valued US$23M; in 2025, they valued US$33M, representing a 45% year-to-year increase.



The depiction and use of boundaries are not guaranteed to be error free, nor do they necessarily imply endorsement or acceptance by the Global Fund.

Benin, Botswana, Cambodia, Cameroon, Central African Republic, Comoros, Ecuador, Eswatini, Ethiopia, Gabon, Ghana, Guyana, Indonesia, Kenya, Lao (Peoples Democratic Republic), Lesotho, Malawi, Maldives, Mongolia, Mozambique, Namibia, Nigeria, Papua New Guinea, Sierra Leone, Sri Lanka, Tanzania (United Republic), Togo, Uganda, Zanzibar and Zimbabwe

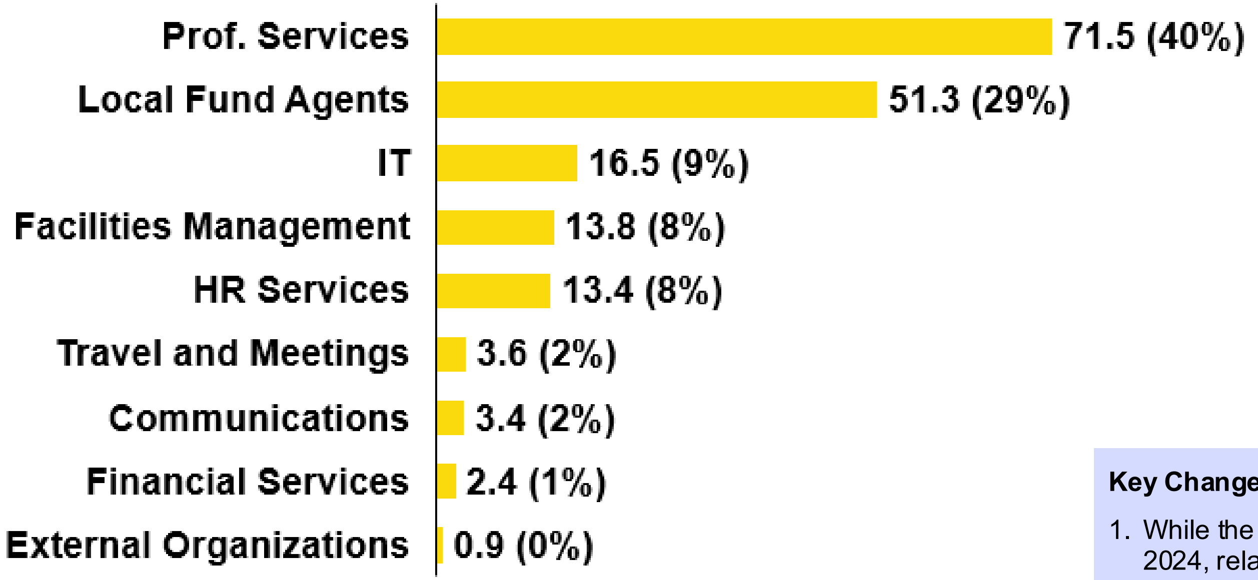
The **top five countries account for US$ 102 M** of the US$128 M cumulative total[1]

Eswatini:	US$ 31M
Benin:	US$ 27M
Nigeria:	US$ 18M
Cameroon:	US$ 15M
Gabon:	US$ 10M

Procurement of goods and services in 2025 through OPEX, SI and C19RM CMLI amounted to US$ 176.6M[1]

In 2025 the top 5 categories represent 95% of the procurement

Procurement by Category in US$ million in 2025[1]



US$ 176.6M total procurement value

[1] Procurement value relates to the value of Purchase Orders issued in 2025. Not related to invoiced amounts or expenditure. For procurement activity that secured multi-year value, the full value of the Purchase Order issued is included, even if expenditure will occur over several years.
Data downloaded on 4 March 2026 using spot rates for non-US$ currencies. Excludes Co-financing, which had a 2025 procurement value of US$ 9.1M, 86% of which was for Professional and HR services. For clarity, exclusive of: salaries, disbursements to CCMs, Board Constituency Funding, Purchase Orders issued for travel by the travel services agent, health product procurement and depreciation of assets. Some totals may not add up due to rounding.
This is a decrease from US$265.8m in 2024, in line with reduced 2025 budget across Operating Expenditure (OPEX), Strategic Initiatives (SIs) and COVID-19 Response Mechanism Centrally Managed Limited Investments (C19RM CMLIs).

Categories and scale of procurement largely in line with the Financial Forecast

1. All procurements are transacted through purchases orders in the Enterprise Resource Planning system with integrated workflow and approvals, with due consideration of segregation of duties.
2. Ongoing efforts resulted in increased numbers of long-term agreements to ensure value for money.
3. Further enhancements to drive procurement efficiency and stewardship have been implemented with the operationalization of the updated procurement policy.

Key Changes vs. 2024:

1. While the total amount has decreased from 2024, relative order of spend has remained stable, with most accounted for by Professional Services, LFA services/travel, IT, Facilities Management, HR Services and remaining categories, in decreasing order.
2. However, while the relative percentage for LFA and Prof. Services increased, the percentage for IT and Facilities Management decreased from 2024. Certain IT and Facilities Management activities in 2025 were driven by the need to address contracts reaching the six-year maximum term, following their initiation when the Global Fund relocated to the Global Health Campus in 2018.

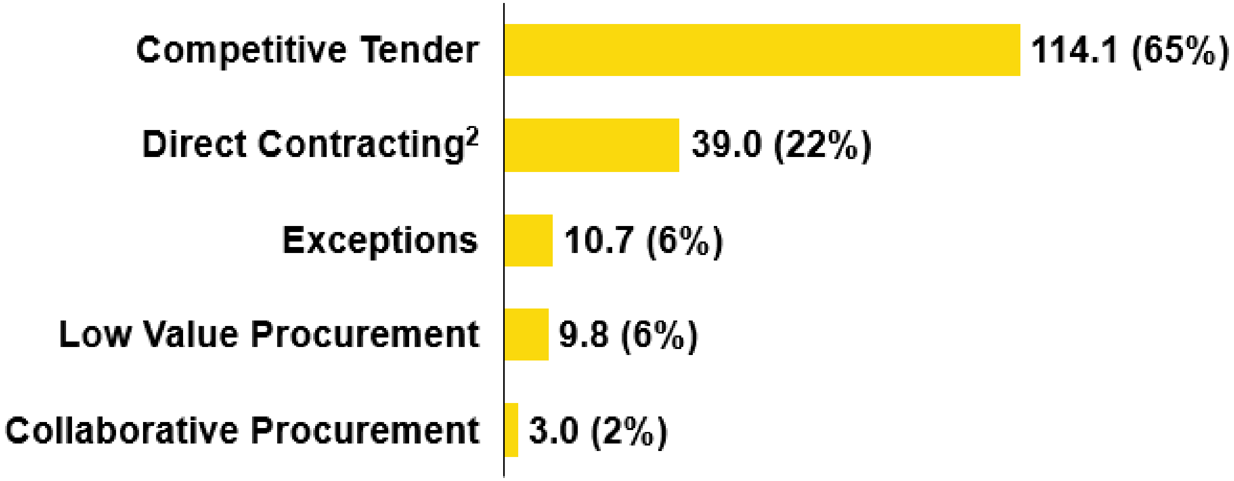
Additional insight into select categories

- **Professional services:** Technical assistance and strategic support, such as laboratory systems, supply chain and others, independent evaluation and learning, strategic project management and advisory, and others
- **LFA:** Professional services and LFA travel
- **IT:** IT consultants, office infrastructure, Software as a Service, and others
- **Facilities Management:** Rent, service providers and others; incl. catering
- **HR Services:** Temporary workforce, recruitment services and others
- **Travel & meetings:** Venue hire, security services, facilitators, transport and accommodation for Board and non-staff – excludes travel for staff
- **Financial Services:** Professional fees for audits, including OIG audits
- **External organizations:** Services related to TRP, IEP, CRG Honorarium

Competitive tenders remain the main procurement method used in 2025 for the Global Fund [OPEX, SI, C19RM CMLI]

Different procurement methods are necessary to balance competition, efficiency, and risk management, ensuring the best value for money while meeting operational needs.

Procurement by Method in US$ million in 2025[1]



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Some totals may not add up due to rounding.

[2] Direct Contracting also includes Board-mandated procurement, including Global Health Campus rent, Technical Review Panel and Independent Review Panel.

C19RM CMLI = COVID-19 Response Mechanism Centrally Managed Limited Investments; OPEX = operating expenditure; SI = Strategic Initiative

Competitive tender remains Global Fund's default procurement method, with overall improvement through better procurement planning

1. Stringent criteria are defined and complied when direct contracting modality is applied. Direct contracting is used when there is a case for sole source, i.e., only one suitable supplier or Board-mandated procurement.
2. Exception procurements undergo a due-diligence review and approval process and are well documented and monitored. Exceptions mostly relate to contract extensions for service continuation.

Key Changes vs. 2024:

No material change was observed in procurement methods between 2024 and 2025, indicating continued consistency in procurement approach, policy application and effective controls.

What is the Global Fund doing to ensure procurement effectiveness and efficiency, stewardship and compliance?

1. **Roll out of the Procurement Manual, a key element of the operational framework, in April 2025.**
   a. **Clear Roles & Responsibilities:** Defined procurement roles with segregated duties to prevent conflicts of interest and ensure accountability.
   b. **Integrity and Financial Due Diligence:** Essential and enhanced integrity checks on suppliers to mitigate operational, reputational, and financial risks.
   c. **Procurement Review & Oversight:** Multi-tiered review mechanisms, including Procurement Review Committee, ensuring compliance with policies and risk assessment.
2. **Transparent & Competitive Sourcing:** Open and limited competition methods with well-documented justification for exceptions.
3. **Supplier Performance Management:** Continuous monitoring, quarterly business reviews, and structured performance evaluation.

While also continuing to drive further process optimization and simplification:

1. **Automation and digitization:** automating Local Fund Agent procurement scoring; implementing automatic closure of Purchase Order lines after six months in closed status; and introducing a Purchase Order maintenance tool to enable limited, business-led updates and reduce administrative burden on technical staff.
2. **Strengthened internal controls:** Check lists built into the Purchase Order creation process to enhance compliance with obligations and facilitate audit trails.
3. **Streamlining and segregation of duties:** Looking to task shift exercise with Finance on procure-to-pay transaction management.

Procurement lessons learnt & trend

- ❑ In 2025, no trade-off interventions were made at the Procurement Policy level; however, trade-off interventions were made at the operational level, to achieve Value for Money, Effectiveness and Efficiency, and Service Continuity.
- ❑ Efforts are underway to further enhance the procurement operationalization framework, building on lessons learnt, including feedback from procurement actors, and in response to procurement audits performed by OIG.
- ❑ Non-Global Fund-financed procurement transactions have increased in 2025, at a total value of US$32m, a 33% increase vs. 2024.
- ❑ Despite the lower replenishment outcome, the overall projected procurement volume and value is forecasted to be similar or higher for GC8. This will require due consideration by the Secretariat in view of OPEX pressure, and the need to further advance on process streamlining, digitization and use of technologies and AI.
- ❑ Business contingency planning and interventions will need to be continued through end 2026, possibly into Q1 2027.

Strong progress, however, increased risks and uncertainties will require more adaptive and trade off interventions

The context remains fluid, and additional action will likely be necessary to limit negative impacts and safeguard continued access to quality-assured, affordable health products through the remainder of GC7 and into GC8.

KEY RISK DRIVERS

1. Evolving context is creating market uncertainties with additional complexity and complications.
2. Geopolitical crises, including ongoing trade and other wars, are creating supply chain disruptions.
3. Continued pressure on available resources may constrain the ability of both countries and the Secretariat to implement effectively.

MITIGATING ACTIONS

1. Deepening partner engagement, with technical agencies, donors and implementers, among others.
2. Active monitoring and engagement with manufacturers and freight forwarders, sourcing flexibility, e.g., health product allocations or product selection.
3. Prioritization and focus on highest impact interventions, process simplification and efficiency in implementation.

Impact of the Middle East crisis on health product supply chains

Ongoing impact has been largely mitigated; however, as the conflict persists, wider and more severe impacts are expected.

NEAR TERM

Manufacturer Level

Impact

1. No immediate production disruptions reported across contracted manufacturers, although stock levels are depleting
2. Rising input cost pressure linked to petrochemicals, energy and packaging
3. Risk of longer lead times and price pressure on upcoming procurement if conflicts and blockades continue.

Global Fund Mitigations

1. Ongoing engagement with manufacturers on capacity, lead time monitoring
2. Adjust sourcing activities and procurement plan to mitigate supply risks
3. Develop business continuity plan to address mid-/longer-term impact

International Transportation to Port of Entry

Impact

1. Airfreight: airspace instability, suspended routes, tight and costly capacity, longer transit times
2. Ocean freight: vessel rerouting away from Red Sea/Gulf; Suez → Cape of Good Hope
3. Higher surcharges, insurance and schedule unreliability increase stock-out risk

Global Fund Mitigations

1. Active shipment prioritization for time-sensitive products through PSAs
2. Dynamic rerouting and mode optimization (air vs ocean) on a shipment-by-shipment basis
3. Enhanced monitoring of lead times, congestion and capacity constraints
4. Non-urgent shipments deferred where cost escalation outweighs urgency

In-Country Storage and Distribution

Impact

1. Fuel price increases (~30% on average) → higher road and air distribution costs
2. Electricity tariff increases and power reliability issues → raising storage and cold-chain risk
3. Risk of reduced delivery frequency to lower-tier facilities and localized stock-outs

Global Fund Mitigations

1. Strengthened coordination with PRs, Country Teams and in-country supply chain teams on stock visibility
2. Promotion of buffering, load consolidation and adjusted delivery models where feasible
3. Ongoing monitoring of fuel and energy-driven risks, with early escalation where supply continuity is threatened

MID-TERM Commodity impact likely to continue through Q3 2026 and plateau at higher cost position through Q4 2026/Q1 2027. Additional measures are considered to mitigate impact as part of the GC8 planning cycle.

B GC7 Market Shaping Achievements

GC7 NextGen Market Shaping and Results Delivered

What we want to achieve	**Equitable Access to Quality-Assured Health Products** Health product availability and affordability Responsive and agile health services and product delivery Resilient and sustainable supply chains WORKING WITH AND TO SERVE THE HEALTH NEEDS OF PEOPLE AND COMMUNITIES		
Strategic Interventions	1 Shape **innovation** and accelerate **new product introductions at scale**	2 Promote capacity building for **regional manufacturing**	3 Drive environmentally **sustainable** procurement and supply chains
Enabling Interventions	1 SMART partnership and **co-creation of implementation roadmaps**		
	2 **Integrate PPM/wambo.org and networked global and regional procurement platforms** to drive further value through pooled mechanisms		
	3 Advance **financing mechanisms** to promote and sustain national procurement capacity (VfM)		
Foundational Interventions	1 **In-country** procurement capacity building and supply chain **systems strengthening**		
	2 Advocate **regulatory framework strengthening** and harmonization		
	3 **Market surveillance** for quality assurance and access		

OVERVIEW OF RESULTS DELIVERED

1. Leveraged our market shaping tools, including the Global Fund's Quality Assurance Policies, the Global Fund's Procurement Policy, the Revolving Facility, the Access Fund and the Global Fund's Pooled Procurement Mechanism to:
   - a. Continue the rapid transition to dual active ingredient nets to address insecticide resistance;
   - b. Introduce Lenacapavir for PrEP simultaneously with upper income countries; and
   - c. Support the diversification of multiple first line therapies for malaria to address drug resistance threat.
2. Promoted capacity building of regional manufacturing and procurement through regulatory harmonization efforts and strengthened engagement with Africa CDC and Regional Economic Communities for increased self-reliance.
3. Drove supply chain efficiencies through digitalization of information systems and optimization of inventory levels and distribution networks in several African countries.

[Additional information in Annex 2 and GF/B54/08]

The GC7 NextGen Market Shaping Strategic Initiative has been fully leveraged to contribute to this progress, providing centralized, catalytic market shaping investments that complement country-led implementation and unlocking outcomes beyond the scope of individual country grants.

NextGen MS Strategic Priority 1: Shape innovation and accelerate new product introductions at scale

Enabled faster, earlier, and more affordable access to high-impact health innovations at scale, using catalytic tools to shape markets, mobilize suppliers and support sustainable pathways from introduction to long-term access.

Dual a.i. ITNs

multiple antimalarials

Lenacapavir PrEP

NextGen Market Shaping has significantly accelerated access to more effective health innovations at scale, demonstrating the Global Fund's ability to shape markets and improve health outcomes.

1. Accelerated introduction of high-impact innovations, including (i) rapid scale-up of dual active ingredient insecticide-treated nets to address resistance, (ii) multiple first line treatments for malaria to address drug resistance and (iii) the first-of-its-kind, simultaneous introduction of lenacapavir for PrEP alongside high-income markets, with initial deliveries reaching nine African countries.
2. Effective use of catalytic market-shaping tools, notably the Revolving Facility and Access Fund, to de-risk supplier engagement, secure early production capacity and bridge affordability gaps during initial market entry.
3. Expansion and diversification of supplier markets, supporting increased competition, improved pricing and greater supply security, including progress toward sustainable generic entry, such as the recent launch of a global expression-of-interest call for generic manufacturers of lenacapavir for review by the Expert Review Panel to expand supply capacity.
4. Strengthened country readiness and implementation, through coordinated investments in regulatory support, demand planning and early procurement to enable timely adoption and scale-up.
5. Demonstrated value for money and market sustainability pathways, combining early access with clear exit and transition planning to sustain affordable access over time.

[See also Annex 2, slides 37-39. See Annex 3 for approach to prioritization and partnership.]

NextGen MS Strategic Priority 2: Promote capacity building for regional manufacturing

NextGen Market Shaping is strengthening efforts for regional manufacturing and procurement capacity, with the aim of contributing to more resilient, competitive and sustainable supply chains.

1. Early signs of growth, with some Africa-based manufacturers progressively meeting international quality standards and successfully supplying health products through the Global Fund's Pooled Procurement Mechanism
2. Strengthened regulatory harmonization and quality assurance, through partnerships with WHO and Regional Economic Communities, supporting joint product assessments, Expert Review Panel support and reliance mechanisms that facilitate multi-country registration and uptake.
3. Progressing on establishing collaborative procurement arrangements, notably through enhanced engagement with Africa CDC and Regional Economic Communities as well as the long-standing partnership with PAHO, to help consolidate demand, retain scale and stabilize pricing over time.
4. Dialoguing on tailored, appropriate models to support countries as they strengthen regionally coordinated, country-led procurement ecosystems aligned with greater domestic leadership and self-reliance.

These efforts support improved affordability and supply resilience while enabling countries to develop regionally anchored, country-led procurement capacity and long-term sustainability

[Additional information in Annex 2, slides 37-38 and 40]

NextGen MS Strategic Priority 3: Drive in-country supply chain system strengthening

Operational supply chain capabilities strengthened through expanded monitoring (43 countries[1]), increased digitization (27 countries[2]) and adapted delivery models (3 countries[3]), improving day-to-day reliability and efficiency in product availability.

NextGen Market Shaping has contributed to system-level impact in key settings, reinforcing overall supply chain resilience and market health, helping enable reliable, cost-efficient access to quality-assured health products in Global Fund-supported programs

1. Improved market monitoring and risk management in 25 countries,[4] using enhanced visibility and data to identify supply risks, price volatility and early warning signals, enabling timely remedial actions to protect continuity of care.
2. Advanced traceability to reduce inefficiencies, wastage, and stock-outs across multiple country supply chain digitization and integration, supporting better demand forecasting, inventory management and texts.
3. Promoted more efficient and people-centered delivery models, including exploration of multi-channel approaches and private-sector logistics solutions to improve last-mile delivery and reach underserved populations.
4. Strengthened sustainability of downstream supply chains, through cost analysis, optimization exercises (7 countries[5]), and development of more transparent and integrated supply chain financing approaches and business models.
5. Deepened partnerships to accelerate transformation, working with governments, regional institutions, and global partners to support coordinated, country-led supply chain improvements and long-term system sustainability.

[1] Number of countries who have On-shelf availability as a metric in GC7 Performance Framework.
[2] Countries who have digitalization initiatives (SIs or grants).
[3] Number of countries executing projects on distribution and network design through CIs.
[4] Number of countries who executed a supply chain risk calibration exercise in 2025.
[5] Number of countries executing cost benchmarking and optimization exercise through CI.

[Additional information in Annex 2, slides 37-38 and 41]

Strategic KPIs support progress made in 2025

On-shelf availability (S8)[1]

% of health facilities with tracer health products available [on the day of visit] – Target 90%

Largely on track

HIV: 89%

TB: 81%

Malaria: 85%

High availability of 1st-line drugs across HTM. Limited availability of TB diagnostics and 2nd-line drugs for TB and malaria.

Supply continuity (S9)

% of priority products with the desired # suppliers meeting QA requirements – Target 90%

On track

High volume products: Target met for 15/16, only artesunate inj. falling short, wtih 3 instead of the target 4 suppliers

Low volume products: Target met for 21/21

High supply continuity across product categories and diseases.

New Product Introduction (S10)

% of new products introduced from an agreed list of products – Target: Lenacapavir PrEP introduction in 2025

On track

HIV: Leveraged US$25M from CIFF to accelerate Lenacapavir rollout across 9 early adopter countries, with initial deliveries in 2 countries by end December 2025

TB: Mobilized additional US$ 14.5m from CIFF to fast-track introduction of NPOC TB diagnostics following ERPD approval in July 2025

Malaria: Continued accelerated scale-up of dual AI ITNs, now representing 69% of GC7 ITN procurement

Key innovations introduced and scaled up through partnership & innovative mechanisms

[1] OSA results reported in Fall 2024 and based on new methodology approved by the Board in Fall 2024; no new data reported in Spring 2025.

AI = active ingredient; CIFF = Children's Investment Fund Foundation; ERPD = Expert Review Panel – Diagnostics; GC7 = Grant Cycle 7; HTM = HIV, tuberculosis and malaria; ITN = insecticide-treated net; NPOC = near point of care; OSA = on-shelf availability; QA = quality assurance; PrEP = pre-exposure prophylaxis

C Planned shifts for GC8, including non-Global Fund-financed procurement

NextGen Market Shaping approach must evolve to sustain progress, respond to the evolving context and support country transition pathways

KEY CHALLENGES

1. Evolving public health landscape resulting in significant ecosystem shifts
2. Geopolitical crises and trade/tariffs causing market and access disruptions
3. Constrained and reduced funding

While the challenges may be great, we do have important levers that can help overcome them

KEY OPPORTUNITIES

1. Impressive pipeline of innovative, more efficacious health products for all three diseases that need to get to market quickly
2. Global Fund's highly efficient and effective pooled procurement mechanism and unique market shaping position
3. Global Fund's country model and partnerships to ensure outcomes and impact

What key adaptations are needed to continue to advance on NextGen Market Shaping efforts?

Further sharpen prioritization to focus on the highest impact market shaping interventions	Align resources tightly to agreed priorities to protect catalytic impact	Drive greater efficiency and effectiveness across market shaping activities	Deepen complementary and joint efforts with partners
Concentrate effort and investment on a limited set of interventions with the greatest potential to deliver impact at scale.	Ensure staff time, funding and management attention are concentrated on priority areas, avoiding dilution of catalytic investments across too many initiatives.	Streamline processes, leverage scale and focus on approaches that deliver clear value for money and measurable outcomes.	Continue to work closely with partners to align roles, reduce duplication and maximize collective impact across the market shaping continuum.

Global Fund's NextGen Market Shaping approach has been updated to contribute to the GC8 Strategic Shifts to maximize outcomes and impact

Global Fund's comparative advantages in market shaping and pooled procurement will be fully leveraged

GC8 SHIFTS

1. Set **transition pathways**
2. Place greater priority on **lowest income, highest burden**
3. Advance **programmatic prioritization**, including for introduction of innovations
4. Accelerate **integration**
5. Feature **community systems and financing**
6. Grow & optimize **domestic resources**

1 Shape innovation and accelerate health product introduction at scale

Work with partners to accelerate product introductions by prioritizing the most impactful and driving complementary efforts

2 Promote regional capacity building for manufacturing and collaborative procurement

Work with regional and country stakeholders for sustainable pathways leveraging the ERP and our collaborative procurement approach

3 Sustain healthy markets and drive resilient and efficient supply chains

Optimize all available resources through Grants, CIs and bilateral contributions to sustain and enhance core market and supply chain resilience

4 Accelerate and scale up non-grant financed procurement

Implement targeted, strategic adjustments to the current approach to enable scaled up non-Global Fund-financed procurement through PPM/wambo.org in support of sustained access to quality assured, affordable health products as countries progress on transition pathways

Refined Strategic Priorities [1/2]: Integrated approaches that support country leadership, service continuity and long-term market resilience

1 Shape innovation and accelerate health product introduction at scale

1. Accelerate market shaping interventions, including product prioritization and partnership efforts, across the pipeline of high-impact innovations across HIV, TB, and malaria where early access and scale can deliver the greatest population benefit.*
2. Deploy catalytic tools (Revolving Facility, Access Fund) selectively, with clear criteria for potential impact, scale-up, sustainability and exit.
3. Strengthen country readiness and regulatory alignment, including demand planning and early procurement, to reduce time from approval to scale.
4. Increase emphasis on transition pathways, supporting affordable access as products move from catalytic support to sustainable market conditions.

2 Promote regional capacity building for manufacturing and collaborative procurement

1. Deepen engagement with regional manufacturing partners, focusing on quality assurance, predictable demand and integration into pooled and collaborative procurement.
2. Advance procurement collaboration efforts with Africa CDC, Regional Economic Communities and other platforms to consolidate demand and retain scale.
3. Support regulatory harmonization and reliance mechanisms to accelerate multi-country registration and uptake of regionally produced products.
4. Prioritize efforts where regional manufacturing is strategically viable, with a primary focus on Africa, while recognizing differing starting points and trajectories across regions.

*See Annex 3, including the innovation pipeline on slide 44, and GF/B54/08

Refined Strategic Priorities [2/2]: Integrated approaches that support country leadership, service continuity and long-term market resilience

3 Sustain healthy markets and drive resilient and efficient supply chains

1. Strengthen market health monitoring to identify early risks to supply continuity, pricing or competition and enable timely corrective action.
2. Scale digital supply-chain solutions that improve demand forecasting, inventory visibility, traceability and performance management.
3. Expand integrated and people-centered delivery models, including multi-channel and private-sector logistics approaches, to improve last-mile access.
4. Advance sustainable supply-chain financing and cost-optimization models, particularly downstream and in transition contexts.

4 Accelerate and scale up non-grant financed procurement

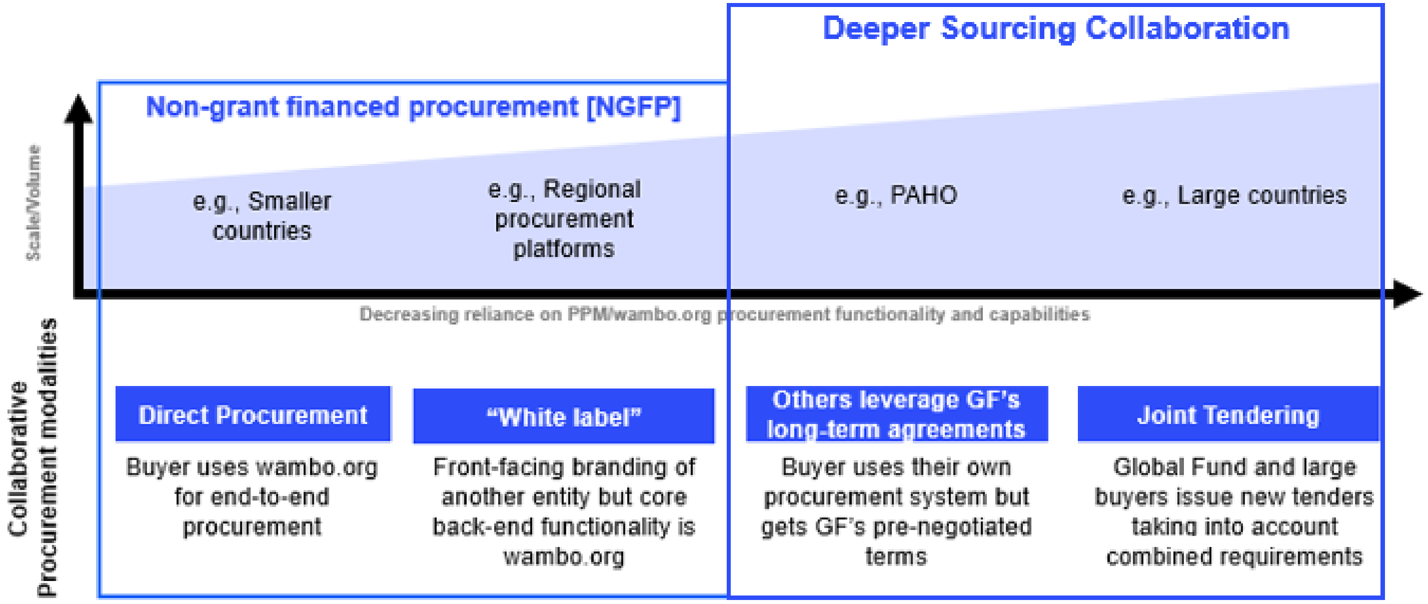
1. Position non-grant-financed procurement through PPM/wambo.org as a strategic pathway to sustain access and affordability, supporting country- and regionally-led transition to domestically financed health responses.
2. Deepen collaborative procurement partnerships with countries and regional platforms over time to demonstrate use cases, build confidence and scale demand.
3. Develop a policy with updates to eligibility and operating models to reduce barriers to uptake while maintaining fiduciary oversight, value for money and sustainability.
4. Develop fit-for-purpose pre-financing solutions to address pre-payment requirements, support transition and unlock broader participation.

[See GF/B54/08 for additional information]

Ensuring that countries have access to existing and emerging pooled procurement options remains critical as they progress on transition and sustainability pathways

OUR COLLABORATIVE PROCUREMENT APPROACH

Global Fund's Procurement Policy enables different approaches for collaborative procurement with partners/buyers suited to the needs. These differentiated models can help maximum scaled synergies and drive cost-efficient and transparent procurement at national, regional and global levels.



1. Leveraging established procurement platforms in the immediate term, such as PPM/wambo.org, provides an option for countries to efficiently access needed quality assured health products and innovations at favorable pricing with reliable supply.
2. Ongoing demand consolidation helps address market fragmentation challenges, such as loss of purchasing power, reduced supplier incentives and market exit, increased supply insecurity and volatility, higher transaction and system costs and weakened market shaping impact.
3. The Global Fund, working with regional procurement platforms, can progress through different collaborative procurement modalities suited to needs, and evolve these over time.

Enabling further scale up of non-Global Fund-financed procurement will require targeted adjustments to the current approach

PRIORITY INTERVENTIONS

1. Update the policy framework for the non-grant financed procurement mechanism, building on earlier Board decisions.
2. Operationalize the new framework through strategic engagement with countries and partners.
3. Stand up a pre-financing facility to enable more countries to use the non-grant financed mechanism.

KEY CHALLENGES TO BE ADDRESSED

- National procurement laws
- Differential procurement priorities
- Limited visibility
- Pre-payment requirement
- Buyer eligibility definition

KEY TO SUCCESS

1. **Enhanced user experience** to support onboarding new buyers and partnering with other pooled procurement mechanisms.
2. **Integration of non-grant procurement into co-financing and public financial management priorities** to set a transparent cost benchmark and provide a procurement option for domestic country procurements.
3. **Nimble and sustainable pre-financing facility** solution that supports countries' access to PPM/wambo.org, when facing cash flow delays and/or difficulties in making a timely advance payment, while keeping Global Fund financially secure.

In May 2026, the Committees considered the proposed enhanced NGFP Policy and financial management approach to enable further scale up of NGFP for decision by the Board

To safeguard affordability, supply security and market stability while supporting countries' transition toward sustainable, domestically financed health systems

Strategy Committee considerations

- Eligible Buyers
- Buyer Preferences
- Buyer vs. Payer Roles
- Quality Assurance
- Eligible Products
- Innovation Access
- Financial Framework
- Addressing Non-Financial Barriers

Audit and Finance Committee considerations

Financial Management Framework

- Segregated Financial Mechanism
- Sustainability
- Pre-Financing Facility
- Financial Risk Management and Controls

Committee engagement followed Board support of GC8 Strategic Shifts, and the updated NextGen Market Shaping approach

Board and Committee engagements

February 2026: B54

- Update on work to review the policy framework for non-Global Fund-financed procurement, including an update on the development of a pre-financing facility.
- Board decision on Sources and Uses of Funds for GC8, including NextGen Market Shaping CI amount that would sustain progress and accelerate prioritised interventions.

May 2026: SC30/AFC30

- Annual update on NextGen Market Shaping (SC) and Procurement (AFC)
- Recommendation on the Policy on Non-Global Fund-financed Procurement (SC), including a Financial Management Framework for implementing the Policy (AFC)

July 2026: B55

- Annual Procurement and Market Shaping Report
- Decision(s) on the Non-Global Fund-Financed Procurement Policy and Financial Management Framework

The Board workplan from February 2026 proposed engagements to enable the scale up of non-Global Fund-financed procurement, with Board decision(s) in July 2026.

See GF/B55/05 for the Decision Paper on Non-Global Fund-Financed Procurement.

Thank you

THE GLOBAL FUND

The Global Fund to Fight
AIDS, Tuberculosis and Malaria

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theglobalfund.org

Annexes & Background Materials

The following items can be found in Annex:

In 2025, deliberate, targeted activities improved responsiveness and strengthened the sustainability of procurement and supply chains for procurement through PPM/wambo.org

SUPPLY SECURITY

Active efforts undertaken to manage ongoing operational challenges and minimize delivery disruption to programs

1. Enhanced monitoring given international supply chain disruption and more countries with political instability or suffering natural disasters.
2. Implemented active monitoring of availability of raw materials to ensure stable supply and pricing.

EFFICIENT FREIGHT / LOGISTICS

Most shipment by sea

84%
by value

97%
by volume

1. Ocean freight is preferentially utilized whenever possible and constitutes 84% of value shipped in 2025 (+4% vs. 2024).
2. Air transportation is required in some circumstances (e.g., urgent need, low volumes, remote destinations not viable by sea, cold chain requirements, etc.).

Pooled volumes underpin sourcing interventions that advance market shaping objectives, sustain high on-time, in-full manufacturer performance and enable rapid health product delivery

PPM/wambo.org Sourcing-related Intervention Highlights from 2025

Concluded the **Molecular Diagnostics Procurement Process** with seven eligible suppliers for multiyear, performance-based frameworks, aligned with NextGen market-shaping objectives.

Completed the **PSA Tender,** reducing implementation risk and strengthening the PSA Strategy across performance, strategy, visibility, alignment and value.

Successful implementation of **Dual ai nets projects**: fully executed and de-risked the Revolving Facility commitment made to reduce the entry price and secure production capacity of these more efficacious nets.

Successfully completed **Gilead contract negotiations and delivery of Lenacapavir** to two countries within four months of US FDA approval.

Milestone delivery of antimalarials for seasonal malaria chemoprophylaxis from an **Africa-based supplier** and delivery of an ARV (TLD) from an **Africa-based manufacturer** to an additional country

2025 progress on **Reliable On-Time In-Full delivery (OTIF)** shown below:[1]

Manufacturer OTIF for key products:

- ARVs = 94%,
- ANTMs = 91%,
- ITNs = 95%,
- RDTs = 90%
- PSA OTIF: 89% (vs. 75% target)

ARVs = Antiretrovirals
ANTMs = Antimalarial medicines
ITN = insecticide treated nets
RDTs = rapid diagnostic tests
PSA = procurement services agent
US FDA = United States Federal Drug Administration

[1]This relates to timeliness of health products being ready for pick up and delivery to countries. Weighted average across manufacturers or PSAs, as applicable.

Annexes & Background Materials

The following items can be found in Annex:

Key progress has been made in Grant Cycle 7 for each NextGen Market Shaping Strategic Priority

NextGen Market Shaping SI

Drive equitable access to quality-assured health products
to meet the needs of the people and communities we serve

1 Accelerate **Health Product Introductions** at scale

Revolving Facility: Accelerating adoption of dual AI nets by expanding supply and bringing prices close to parity with conventional ITNs.

Access Fund: Enabled diversification of ACTs to limit spread of resistance and supported the rapid mid-cycle introduction of Lenacapavir PrEP accelerating access to more effective malaria treatments and next-generation HIV prevention.

Country Readiness

1. Technical assistance (TA) for introduction of pediatric ALD and accelerated adoption of HIV rapid diagnostic tests
2. TA to develop procurement strategies, support demand generation for country introduction of new TB diagnostics
3. TA for improved quality of Therapeutic efficacy studies for antimalarial medicines
4. Develop new normative guidance and update existing documents

Expert Review Panel (ERP):
Expert Review Panel for pharmaceuticals and diagnostics

2 Promote capacity-building for **African manufacturing**

QA Training & TA: Quality assurance training delivered at scale to African manufacturers, complemented by targeted, needs-based technical assistance through partner (including GMP, dossier development) to support selected manufacturers in progressing toward WHO prequalification and ERP pathways.

Regional regulatory networks: Technical assistance to strengthen Regional Economic Communities' (RECs) regulatory networks, for enabling reliance, joint assessments and harmonized registration of quality-assured medical products across countries.

Collaborative Procurement: Strengthening engagement with Africa CDC, RECs, and PAHO to explore Collaborative Procurement efforts for consolidated demand, sustained procurement scale and stable pricing over time.

ERP for African rapid diagnostic tests (RDTs):
ERP mechanism to accelerate access to quality-assured African manufactured HIV RDTs

3 Drive **in-country supply chain systems strengthening**

Accelerating digitalization

- Scale information systems to improve visibility and performance
- Deploy AI to strengthen oversight and logistics efficiency
- Expand digital platforms (e.g., logistics marketplace) to increase coordination and access

Design alternate & efficient delivery channels

- Expand private sector delivery to improve access to quality-assured products
- Strengthen logistics networks and provider engagement
- Pilot sustainable financing models to support last-mile delivery

Strategy & Governance

- Implement supply chain cost benchmarking to guide planning and budgets
- Translate national strategies into prioritized investments
- Strengthen governance, integration and catalyze resource mobilization

The US$ 49M NextGen Market Shaping Strategic Initiative has catalyzed additional funds for the Revolving Facility and the Access Fund

ACT: Artemisinin Combination Therapies | APR Artemisinin Partial resistance | GMP = Global Malaria Programme | ITN = insecticide-treated net | PrEP = pre-exposure prophylaxis

GC7 NextGen Market Shaping Investment

The NextGen Market Shaping Catalytic Investment (CI) has created a platform that successfully leveraged additional private sector investments in GC7 to advance key priorities.

Accelerate Health Product Introductions at Scale

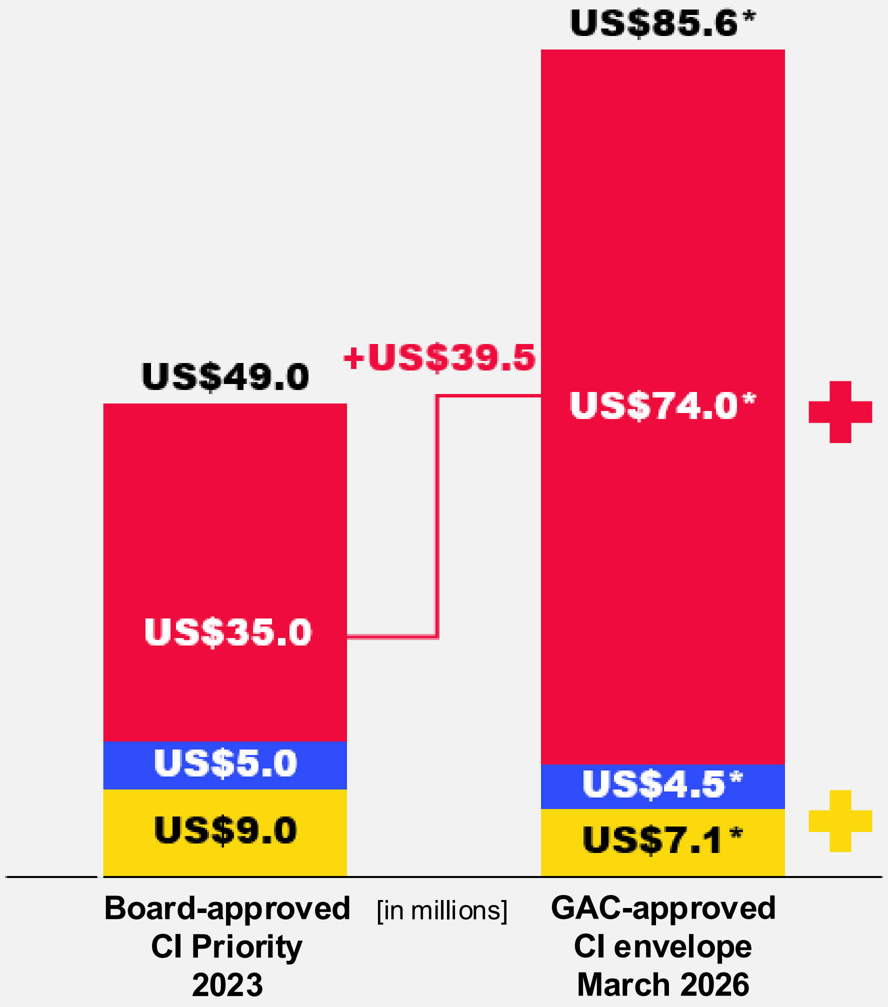
- Revolving Facility
- Access Fund
- Country Readiness
- Expert Review Panel

Promote Capacity Building for African Manufacturing

- Quality Assurance Training & Technical Assistance
- Regional Regulatory Networks
- Regional Pooled Procurement

Drive In-Country Supply Chain Systems Strengthening

- Accelerating Digitalization
- Design Alternate & Efficient Delivery Channels
- Strategy & Governance



+ additional US$20m contribution from CIFF for Lenacapavir, available for use in GC7 if needed

+ aligned contribution of US$5m from the Gates Foundation for GC7

+ aligned contribution of US$5.5m from the Gates Foundation for GC7

*The net increase has been reduced by ~US$3m through the GC7 de-allocation exercise implemented in 2025 and exclusion of centralized program management costs.

Shape innovation and accelerate new product introductions at scale

In addition to what was previously reported in GF/B54/08.

Additional Examples of Progress in 2025

Accelerating Access to Optimized Pediatric HIV Treatment

Building on Unitaid's investment in the development of a child-friendly, generic pediatric fixed-dose ARV (pALD), the NextGen Market Shaping Strategic Initiative translated product availability into sustained country uptake across seven countries. Expanding access to simplified pediatric formulations is essential to closing treatment gaps linked to delayed initiation and poor adherence and improving child survival.

By aligning policy adoption, regulatory alignment and implementation readiness, particularly in underserved settings with limited partner presence, this collective effort aligned partner investments around a structured transition pathway for pediatric ARVs, ensuring that children receive timely access to improved, easier-to-use treatments that support better adherence and long-term health.

Embedding Digital Innovation in National TB Strategies

The NextGen Market Shaping Strategic Initiative translated grant investments in ultraportable digital chest X-ray (DCXR) and computer-aided detection (CAD) into measurable TB case-finding gains by embedding these tools into national policies and delivery systems across 13 countries. By expanding access to high-quality digital screening, the initiative helped close persistent TB diagnosis gaps through earlier, more systematic detection of people at risk.

Mini X-ray machine with CAD software in a health facility in Nkau, Lesotho

Targeted technical assistance integrated DCXR and CAD into national TB frameworks and screening strategies for vulnerable populations, strengthening implementation capacity and improving resource use. This positioned digital CXR and CAD as sustainable, scalable components of national TB control strategies and enhanced resilience to evolving epidemiological and diagnostic needs.

Preparations for the introduction of Near Point of Care TB Diagnostics

The NextGen Strategic Initiative positioned 13 early adopter countries to introduce near point-of-care (NPOC) TB diagnostics in 2026, generating real-world implementation data to inform scaled adoption in GC8. Leveraging catalytic co-pay funding from the Children's Investment Fund Foundation through the Access Fund, the initiative accelerated early product introduction and reduced financial barriers, while regional convenings and planning workshops aligned countries, donors, and partners on rollout pathways. Following Expert Review Panel - Diagnostics approval in July 2025 and initial procurement through wambo.org in December 2025, countries are now poised to begin implementation and generate the evidence needed to guide future scale and financing decisions.

Promote capacity building for regional manufacturing

Additional Examples of Progress in 2025

In addition to what was previously reported in GF/B54/08.

In 2025, the Global Fund continued to leverage its Pooled Procurement Mechanism (PPM)/wambo.org to procure regionally produced health products.

In 2025, the Global Fund's PPM procured antiretrovirals, malaria treatments, essential medicines, insecticide-treated nets and HIV self-testing kits, including historic first procurements of seasonal malaria chemoprophylaxis and HIV professional rapid diagnostic tests from Africa-based manufacturers and manufacturing sites.

1. Supply of quality-assured antiretrovirals from a Kenya-based manufacturer expanded to Lesotho, marking a further step in scaling access to African-made, WHO pre-qualified HIV treatments. This expansion followed the milestone first delivery of this product to Mozambique in 2024.
2. Antimalarial medicines continue to be procured from Africa-based manufacturers, including the first-ever deliveries of sulfadoxine–pyrimethamine plus amodiaquine from an Africa-based manufacturer in Kenya for seasonal malaria chemoprophylaxis (SMC) campaigns in Togo, Ghana and Mali. In Mali alone, sufficient supply was secured to support approximately 1.8 million children in receiving all four monthly SMC doses. Artemether–lumefantrine was also supplied from Kenya and Uganda to Mali, Mozambique, Niger, Tanzania and Uganda. This also included deliveries of intermittent preventive treatment for malaria produced in Kenya, supporting malaria prevention for hundreds of thousands of pregnant women in Cameroon.
3. Quality-assured essential medicines were procured from Africa-based manufacturing sites in Kenya and Uganda for Benin, Chad, Côte d'Ivoire, Eswatini, Gambia, Guinea, Guinea-Bissau, Lesotho, Malawi, Mali, Niger, Uganda and Zambia.
4. Between 2023 and 2025, more than 22 million insecticide-treated nets were procured from a Tanzania-based Africa manufacturer, representing 10% of all ITNs and nearly 27% of all non-dual a.i. nets ordered for Africa.
5. HIV self-testing rapid diagnostic tests from a manufacturing site in South Africa for Zambia, marking continued progress in expanding access to Africa-manufactured HIV self-testing solutions.
6. First ever HIV professional rapid diagnostic tests from a manufacturing site in Africa for use in Nigeria, contributing to the development of regional markets for quality-assured diagnostics and marking a major milestone for supply security in Africa.

Drive in-country supply chain system strengthening

Additional Examples of Progress in 2025

In addition to what was previously reported in GF/B54/08.

Expansion of Private Sector Health Access Initiatives

Initiated projects in Uganda and Nigeria to expand access to quality-assured health products through private sector delivery channels, with strong endorsement from Ministries of Health.

Projects will improve access to malaria and HIV products, strengthen integration (product, data, financial flows), and test sustainable financing models.

Launch and Growth of the Logistics Marketplace Platform

Operationalized the Logistics Marketplace platform, enabling improved access to private sector logistics providers.

As of December 2025, 39 companies (158 users) are registered, supporting increased market visibility and engagement.

Accelerating Supply Chain Digitalization& Use of AI to Drive Efficiency

Advanced supply chain digitalization by supporting ERP implementation and stabilization across 21 EPSS warehouses in Ethiopia, while ensuring stabilizing of eLMIS in The Gambia, achieving 98% facility coverage.

Demonstrated that targeted AI agents can materially strengthen oversight of outsourced logistics and drive time efficiencies by 87% in Nigeria.

Supply Chain Cost Benchmarking for Smarter Investments

Progressed in-country supply chain cost benchmarking with 7 country assessments initiated, including development of Nigeria's assessment and revised GC8 budget guidelines.

This work strengthens evidence-based planning and supports informed, scalable grant-making across countries and .

Driving Country-Led Supply Chain Transformation and Investment Priorities

Advanced impact of the Supply Chain Leaders Forum by supporting 25 countries to translate transformation plans into GC8 investment priorities.

Countries prioritized integrated planning, financing, and digitalization, while seeking technical support and financial models to strengthen resource mobilization.

eLMIS = electronic logistics management information system | ERP = enterprise resource planning

Annexes & Background Materials

The following items can be found in Annex:

Annex 1: Additional reporting on the Pooled Procurement Mechanism

Annex 2: Additional Information on the GC7 NextGen Catalytic Investment

Annex 3: Health Product Introduction Approach

Annex 4: Relevant Past Board Decisions

Annex 5: Links to Relevant Past Documents & Reference Materials

Progress with NextGen MS Strategic Priority 1* has been driven by Global Fund's Guiding Principles for Market Shaping

The Global Fund applies a set of guiding principles to identify and prioritize market-shaping interventions that can deliver the greatest impact for countries. These principles ensure that efforts focus on opportunities where the Global Fund has a clear comparative advantage, can accelerate access and affordability at scale, and can work in partnership with others to strengthen markets sustainably over time.

Sustainability

Assure a pathway to sustainability for all engagements with a clear exit strategy from the outset.

Time to Market

Focus on interventions with impact in timeframes; prioritize results over ambition and support regional diversification.

End-to-End Integration

Close collaboration across Global Fund and with countries to integrate supply- and demand-side considerations from design to delivery.

Impact

Highest-priority opportunities to improve health outcomes and value for money.

Suitability

Catalyze interventions capable of achieving scalability, access and affordability.

Comparative Advantage

Act where Global Fund is well-positioned with market shaping levers and procurement primacy.

Partnership

Complementarity with partners; avoid duplication; leverage co-investment and shared accountability.

* Shape innovation and accelerate new product introductions at scale

The Global Fund reviews the robust innovation pipeline to prioritize action where it, together with partners, has distinct leverage to accelerate access

Innovation Pipeline: Update of June 2026

2024-2026 | 2027-2029 | 2030-2032

HIV & COIM

- ARVs: last-mile DTG scale-up incl. pALD ●
- 2L ARVs: TLD recycling, adult/pediatric DRV/r, dual ARV regimens ●
- pTAF ●
- Long-acting HIV treatment modalities (e.g., injectables, implants, monoclonal antibodies) ●
- HIV & COIM RDTs ●
- PrEP: 1M ring, 2M CAB, DPP ●
- PrEP: 6m LEN originator and generic ●
- PrEP: 3M ring, 4M CAB, 1Y LEN, 1M MK-8527 ●
- Cure and future prevention innovations
- TPT: 3HP, pRPT ●
- Harm reduction: LDSS, LADB ●
- AI to facilitate product use / service delivery
- STI Diagnostics ●
- COIM Self-Tests
- AHD Package of Care ●
- Multiplex RDTs (STIs/HIV/Hep) ●
- AHD: CrAg SQ, Histo. LFA, generic L-AmB, new CD4 offerings ●
- HIV Tx Monitoring
- Future TB/HIV, AHD, COIM innovations (e.g., long-acting HCV DAAs, long-acting or new formulations for cryptococcal meningitis)

TB

- New decentralized tests including Near Point of Care tests+ new sampling techniques ●
- New TB vaccines
- Multi-disease diagnostic platforms including DRTB tests ●
- Immuno-therapy treatment
- Digital CXR and CAD ●
- Urinary Point of care tests ●
- Long-acting prev.
- New formulations for shorter regimens for all forms of TB ●
- AI-based health technologies: Cough apps, AI stethoscopes, AI point of care ultrasound ●
- Universal treatment for DS and DR TB

Malaria

- MFT: AS-PY/ DHA-PPQ ●
- Pediatric drug optimization
- MFT: Triple ACTs ●
- Antimalarials with novel molecules and single dose cure
- MFT: GanLum ●
- Tafenoquine and associated near-patient G6PD test ●
- Non-HRP2 RDTs
- Non-invasive diagnostics*
- Eaves tubes ●
- Genetically modified mosquito systems
- Insecticide Treated baby wraps ●
- Monoclonal antibodies
- Long Acting Injectable
- Spatial emanators ●
- Transmission blocking/combo vaccine
- CFP-only ITNs
- Tenebenal ITNs
- Other novel ITNs
- New IRS
- Endectocides

Notes and Glossary

- Developed and updated jointly with partners to inform market shaping interventions across the ecosystem.
- Illustrative, not exhaustive. Reflects work with many other partners not shown here.
- Future plans subject to availability of funds.

*variety of biomarkers and technology platforms, including lateral flow test platforms; novel biomarkers; hemozoin detection, and volatile biomarker signatures and technologies

Legend

- Prevention tool
- Diagnostic tool
- Therapeutic tool
- Screening tool
- Mix of prevention, diagnostic and/or therapeutic tools
- Partner Priority (Monitoring)
- More limited potential of coming to market
- ● Active Unitaid grants / Global Fund collaboration

AHD: Advanced HIV disease
ARVs: Antiretrovirals
ATSB: Attractive targeted sugar baits
CAD: Computer aided diagnostics
COIM: Co-infections and co-morbidities
CXR: Chest X-ray
Dual-AI: Dual active ingredient
EVT: Elimination of vertical transmission
ITNs: Insecticide treated Nets
MFT: Multiple First Line Therapies
PrEP: Pre-exposure prophylaxis
TPT: Tuberculosis Preventive Treatment
RDT: Rapid Diagnostic Test
STI: Sexually transmitted infections

The Global Fund plays different roles and deploys different levers across the innovation, access and scale continuum

The Global Fund works in close partnership with stakeholders to strengthen the overall market shaping pipeline, maximizing the benefits we can deliver at each critical stage of product introduction

INNOVATION
Early-Stage Monitoring

Global Fund Role: Active Support

ACCELARATING INNOVATION

- Monitor pipeline & emerging products
- Identify high-potential candidates
- Engage manufacturers early
- Assess market dynamics & risks
- Market intelligence & analysis
- Ensure products are fit for purpose

KEY LEVERS
Market Intelligence · Pipeline Monitoring · Partner Monitoring – Market Signaling - Early Supplier Engagement - Country consultation

ACCESS
Introduction & Scale-Up

Global Fund Role: Active Engagement

DRIVING ACCESS & AFFORDABILITY

- Engage industry on access terms & pricing
- Deploy market shaping levers
- Support pilot introduction & country readiness
- Accelerate regulatory approvals
- Catalyze co-investment with partners
- Innovative finance mechanisms including non grant financing

KEY LEVERS
Access Fund · Tender/PPM . Market Signaling Revolving Facility · Regulatory TA · Country Readiness

SCALE
Full Market Leadership

Global Fund Role: Lead Role

SUPPLY SECURITY & INTEGRATION

- Engage industry for supply security to sustain a healthy market
- Support accelerated introduction at scale
- Strengthen country systems & readiness
- Drive sustainable pricing & market structure
- Manage exit & transition strategy

KEY LEVERS
Access Fund . Revolving Facility · Tender/PPM · Market Signaling . Systems Strengthening · Exit Strategy

Monitoring & Intelligence → | Active Engagement → | Lead & Sustain

Increasing Global Fund Engagement & Resource Intensity →

CATEGORY/MARKET STRATEGY MATRIX

↑ URGENCY ↓ / ← GLOBAL FUND LEVERAGE →

PARTNER & CATALYZE **High Urgency + Lower Leverage** Critical health need but Global Fund alone cannot move the market. Convene partners; use Country readiness and TA to catalyze others.	**ACT NOW — LEAD** **High Urgency + High Leverage** Global Fund's primary market shaping lane. Deploy full toolkit: Access Fund, Revolving facility, Volume guarantee, Tender, Pooled Procurement Mechanism , Country Readiness support. Set ambitious targets and lead coordination.
MONITOR & WATCH **Lower Urgency + Lower Leverage** Neither urgent nor well-positioned. Place on watchlist; periodic review; do not commit resources until signals improve.	**SELECTIVELY INVEST** **Lower Urgency + High Leverage** Global Fund can move the market but urgency is lower. Invest selectively — monitor pipeline, use light-touch levers, prepare for potential future scale.

The Global Fund considers urgency and leverage to inform prioritization decisions on type of engagement

The Global Fund deploys key market shaping tools and partner engagement across the continuum from pipeline monitoring to assess/adapt

HOW WE PRIORITIZE COMMODITIES

All market shaping investments are filtered through three lenses:

1 Disease Burden & Impact Potential

Health impact potential, Global Fund disease portfolio relevance, burden of disease, value for money of the intervention potential for regional production and scale.

2 Market Readiness & Global Fund Leverage

Maturity of the product, market structure, whether Global Fund procurement/financing levers can yield market impact.

3 Feasibility & Comparative Advantage

Global Fund's unique position vs. partners, likelihood of success within timeframes, partnership landscape and duplication risk.

GLOBAL FUND FINANCING & MARKET SHAPING MECHANISMS

The Global Fund deploys a suite of targeted instruments across the value chain:

Tenders, Market Signaling and PPM

Access → Scale

Leverage tenders, market signaling and pooled procurement mechanisms to aggregate demand, securing favorable introduction prices and achieving even better pricing as volumes scale.

Revolving Facility

Access → Scale

Financing mechanism for large-scale procurement; enables supply security and volume guarantees for manufacturers.

Access Fund

Innovation → Access

Time-limited co-investment to catalyze introduction of new products at scale; bridge pricing gaps; support generics entry.

Country Readiness

All Phases

Technical assistance and capacity building to ensure countries can absorb new products, regulatory, guidelines, systems, and demand.

THE MARKET SHAPING PROCESS: FROM SIGNAL TO IMPACT

1 Pipeline Monitoring

Monitor innovation pipeline to identify products with potential; assess disease burden fit

2 Market Assessment

Analyze market structure, pricing, competition and identify areas Global Fund could leverage for impact

3 Prioritization Decision

Prioritize commodities based on market intelligence, disease burden, country engagement, funding availability, and impact potential.

4 Intervention Design

Design market-shaping interventions (including exit strategies) aligned with partners and country priorities, and with defined funding needs.

5 Implementation & Monitoring

Deploy levers; monitor impact; engage countries and suppliers

6 Assess & Adapt

Review outcomes; adjust prioritization based on current realities; implement exit or transition strategy

Illustrative Example | How the Global Fund works with partners across the market shaping process continuum: Lenacapavir for PrEP

THE MARKET SHAPING PROCESS: FROM SIGNAL TO IMPACT

1 Pipeline Monitoring

Monitor innovation pipeline to identify products with potential; assess disease burden fit

- CSOs, Communities & AVAC
- Gates Foundation
- MedAccess
- Medicines Patent Pool
- Unitaid

2 Market Assessment

Analyze market structure, pricing, competition and identify areas Global Fund could leverage for impact

- CHAI
- CIFF
- Gates Foundation
- Unitaid

3 Prioritization Decision

Prioritize commodities based on market intelligence, disease burden, country engagement, funding availability, and impact potential.

- CSOs, Communities & AVAC
- CHAI
- Gates Foundation
- MOH/National Gov’t
- Unitaid
- U.S. Gov’t
- WHO/UNAIDS

4 Intervention Design

Design market-shaping interventions (including exit strategies) aligned with partners and country priorities, and with defined funding needs.

- CHAI
- Gates Foundation
- MOH/National Gov’t
- Unitaid
- WHO/UNAIDS

5 Implementation & Monitoring

Deploy levers; monitor impact; engage countries and suppliers

- CHAI
- CIFF
- Gates Foundation
- MOH/National Gov’t
- Population Services International
- Unitaid
- Wits RHI

6 Assess & Adapt

Review outcomes; adjust prioritization based on current realities; implement exit or transition strategy

- CIFF
- Gates Foundation
- MOH/National Gov’t
- U.S. Gov’t

CHAI = Clinton Health Access Initiative | CIFF = Children’s Investment Fund Foundation | CSO = Civil society organization | Gov’t = Government | MOH = Ministry of Health | PrEP = pre-exposure prophylaxis | U.S. = United States | Wits RHI = Wits Reproductive Health and HIV Institute

Annexes & Background Materials

The following items can be found in Annex:

Annex 4: Relevant Past Board Decisions [1/2]

RELEVANT PAST DECISION POINT	SUMMARY AND IMPACT
GF/B52/DP06 Catalytic Investments for the 2026-2028 allocation period (Grant Cycle 8) **(November 2024)**	Based on the recommendation of the Strategy Committee, the Board approved that the total amount of funding for catalytic investments in GC8 will be determined by the total amount of sources of funds for allocation for GC8. The Board also approved the catalytic priorities for GC8, based on the total amount of sources of funds for allocation. The decision included other aspects, including operational flexibilities for the Secretariat, including those which require reporting to the Strategy Committee and those which also require Strategy Committee approval.
GF/B51/DP04: Global Fund Procurement Policy Update **(April 2024)**	Approved a fully updated Global Fund Procurement Policy, replaced the 2008 framework, delegated implementation authority to the Executive Director, delegated authority to the Secretariat and Audit and Finance Committee Leadership to make non-material changes to the Policy and established ongoing oversight through the Audit and Finance Committee.
GF/B51/DP03 Quality Assurance Policy for Vector Control Products **(April 2024)**	Based on the recommendation of the Strategy Committee, the Board approved the Quality Assurance Policy for Vector Control Products and Related Equipment. It requested the Secretariat to work with the World Health Organization (WHO) to establish an Expert Review Panel for Vector Control Products and to conclude the necessary arrangements with WHO. It also delegated authority to the Secretariat, in consultation with the Strategy Committee Chair and Vice Chair, to make non-material adjustments to the Policy and to report back to the Strategy Committee and Board on all such changes. Additionally, while the Board expects efforts will be made to fully implement the Policy upon its approval, the Board noted that implementation of certain aspects of the Policy would require a reasonable transition period.
GF/B50/DP06 Amended and Restated Global Fund Quality Assurance Policy for Pharmaceutical Products and Amended and Restated Global Fund Quality Assurance Policy for Medical Devices (including In-Vitro Diagnostics) and Core Personal Protective Equipment **(November 2023)**	Based on the recommendation of the Strategy Committee, the Board approved: 1. the Amended and Restated Quality Assurance Policy for Pharmaceutical Products; and 2. the Amended and Restated Quality Assurance Policy for Medical Devices (including In-Vitro Diagnostics) and Core Personal Protective Equipment, which replaces in its entirety the former Quality Assurance Policy for Diagnostics Products. The Board delegated authority to the Secretariat, in consultation with the Strategy Committee Chair and Vice Chair, to make non-material adjustments to these two quality assurance policies and to report back to the Strategy Committee and Board on all such changes.

Annex 4: Relevant Past Board Decisions [2/2]

RELEVANT PAST DECISION POINT	SUMMARY AND IMPACT
GF/B48/DP07: Advancement of Non-Global Fund-Financed Procurement Utilizing the Pooled Procurement Mechanism and wambo.org (November 2022)	Removed the cap and authorized the ongoing use of wambo.org for non-Global Fund-financed procurement by governments and development partners, embedding this function within the Global Fund’s NextGen Market Shaping framework, building on the findings from an independent evaluation.
GF/B42/DP05: Evolving the wambo.org Pilot for Non-Global Fund-Financed Orders (November 2019)	Approved an expanded pilot allowing governments and development partners to use wambo.org for non-Global Fund-financed procurement—up to USD 50 million—with structured oversight, evaluation, and committee-level governance.
GF/B37/DP09: Wambo.org: Progress Update and Steps for Advancement (May 2017)	Approved a tightly controlled pilot allowing current Global Fund Principal Recipients to use domestic funds for procurement via PPM/wambo.org, with close monitoring by the Strategy Committee to inform the platform’s long-term strategic role.
GF/B36/DP04: Amended and Restated Comprehensive Funding Policy (November 2016)	Approved an updated Comprehensive Funding Policy that aligned the Global Fund’s core financial framework with its refined allocation methodology, strengthened portfolio and liquidity management, and clarified how resources are determined and managed across allocation periods.
GF/B15/DP15: Market Dynamics and Voluntary Pooled Procurement (April 2007)	Adopted the Objective and Guiding Principles for the Global Fund's Market Dynamics Strategy, endorsed the strategic model for voluntary pooled procurement, as a first element of its strategy on market dynamics, and delegated authority to the Secretariat to implement in a phased approach to initially cover several product categories, taking into account the Global Fund's comparative advantage and the work already done by different partners.

Annex 5: Links to Relevant Past Documents & Reference Materials

a) GC8 Strategic Shifts: NextGen Market Shaping, GF/B54/08 (February 2026)

b) Procurement and NextGen Market Shaping Update, GF/B53/05, (May 2025)

c) Quality Assurance Policy for Vector Control Products and Related Equipment, GF/B51/05 (April 2024)

d) Global Fund Procurement Policy Update, GF/B51/20 (April 2024)

e) Global Fund Quality Assurance Policy Updates: Pharmaceutical Products and Medical Devices, including In-Vitro Diagnostics, and Core Personal Protective Equipment, GF/B50/05 (November 2023)

f) Update on NextGen Market Shaping, GF/SC22/04 (July 2023)

g) Drive equitable access to quality assured health products through NextGen Market Shaping, GF/B48/11 (November 2022)

h) Non-Global Fund-financed procurement through wambo.org, GF/B48/05 (November 2022)

i) Catalytic Investments for 2023-2025 Allocation Period: Frequently Asked Questions, GF/SC19/11C (July 2022)

j) Supply Operations and Market Shaping Update, GF/SC17/19 (October 2021)