



TERMS OF REFERENCE

Mid-Term Review of Unitaid's 2023-2027 Strategy

PURPOSE OF THESE TERMS OF REFERENCE

These Terms of Reference (TOR) serve as an overall framework for the services to be provided by the Contractor selected under this Request for Proposal (RFP 2024.16).

DESIRED TIMEFRAME

Requested start date: Mid-February 2025

Expected completion date: December 2025

TERMS OF REFERENCE

1. Background

Founded in 2006 by Brazil, Chile, France, Norway and the United Kingdom and hosted by the World Health Organization, Unitaid saves lives by making new health products available and affordable for people in low- and middle-income countries. We work with partners to identify innovative treatments, tests and tools, help tackle the market barriers that are holding them back, and get them to the people who need them most – fast. At the start of 2024, Unitaid had an active portfolio of over 63 grants worth US \$1.3 billion in value.

Since 2006, Unitaid has unlocked access to more than 100 groundbreaking health products to help address the world's biggest health challenges, including HIV, TB, and malaria; women's and children's health; and pandemic prevention, preparedness and response. Every year, more than 300 million people benefit from Unitaid-supported products. Unitaid's current donors have grown to include the Gates Foundation, Japan, the Republic of Korea and Spain. Canada, Germany, Italy, Portugal, and Wellcome have provided additional funding for our COVID-19 response. The organization is governed by an Executive Board.

The Executive Board, Unitaid's decision-making body, determines the organization's objectives, monitors progress and approves budgets. The Board is chaired by Marisol Touraine, former French Minister of Social Affairs, Health and Women's Rights, 2012-2017. Making decisions by consensus, the Executive Board consists of 13 members: One representative nominated from each of the five founding countries (Brazil, Chile, France, Norway and the United Kingdom), Spain and the Republic of Korea; One representative of African countries designated by the African Union; Two representatives of relevant civil society networks (nongovernmental organizations and communities living with HIV/AIDS, malaria or tuberculosis); One representative of foundations; One representative of temporary shared non-voting seat (Japan); One representative of the World Health Organization (non-voting).

[Unitaid's 2023-2027 Strategy](#) was conceived to address the growing need for faster, equitable access to affordable and effective health products, at a time when progress towards achieving SDG3 – to ensure healthy lives and promote wellbeing for all, at all ages – had stalled and the Covid-19 pandemic had exposed the dramatic inequality in access to care between high- and

low-income countries. The Strategy is the road map for how Unitaid will make an essential contribution to the global health community's common challenges.

The 2023-2027 Strategy outlines a stronger emphasis on inclusive and demand-driven partnerships, including deeper engagement and collaboration with affected people and communities to ensure they are part of every step of Unitaid's work. It also recognizes Unitaid's comparative advantage to respond to challenges in women's and children's health and global health emergencies, and formally integrates these two programmatic areas, alongside Unitaid's well-known focus on HIV, TB, malaria and cross-cutting work. The Strategy also identifies that need for Unitaid to gain a stronger voice in the global health world and pushes for Unitaid to take a more active convening and influencing role to align partners towards common global health goals.

In response to recommendations from an organization-wide functional review¹ and to bolster the implementation of the Strategy, a set of change initiatives were introduced progressively starting in 2023. These include five strategic initiatives and four operational initiatives. The strategic initiatives cover the areas of i) Regional Manufacturing, ii) Climate and Health, iii) Pandemic Prevention, Preparedness and Response, iv) Partnerships and v) Access. The operational initiatives focus on i) improving work-planning, ii) increasing effectiveness, efficiency and reducing workload, iii) strengthening resource mobilization and iv) building organizational capacity to address existing and emerging needs.

Unitaid's Strategic Performance Framework (ref. Appendix 2) guides how Unitaid measures and manages the performance of its 2023-2027 Strategy. It is accompanied by a set of strategic and organizational key performance indicators (KPIs) that measure key aspects of Unitaid's work at the mission, strategic objective, and organizational (operational) levels (ref. Appendix 3).

With the current strategic period approaching the mid-point, Unitaid is now preparing to assess the overall progress to date in implementing the Strategy, which includes: i) assessing progress to deliver upon Unitaid's Strategic and Organizational objectives, alongside the set of strategic and operational change initiatives described above, as well as ii) reflecting on the challenges, successes and lessons learned to date to inform the direction of Unitaid's strategy beyond the current strategic period.

2. Objectives and scope of the review

2.1 Objectives

The main objectives of the mid-term strategy review are to provide:

- A critical assessment of the relevance and coherence of the 2023-2027 strategy, and the progress made, the achievements realized, and challenges encountered during its implementation to date;
- A synthesis of key findings, lessons learned and actionable recommendations for Unitaid to deliver on the strategy and to meet its objectives and targets in the remaining period, as well as to inform the direction of Unitaid's next strategy.

¹ A secretariat-wide functional review was conducted in the period September 2022 – April 2023 to define an optimal organizational design, considering real-world conditions/constraints and comparing to the existing design, and deliver a clear plan for making any changes required to optimize the Secretariat to deliver on the 2023-2027 Strategy. The change initiatives in scope of this mid-term review emerged in response to the recommendations of the functional review. (Ref Appendices 4-6 for more information)

2.2 Scope

In line with the broader objectives stated above, the review will provide both a backward- and a forward-looking perspective – on the one hand, assessing the status of Unitaid’s strategy and change initiatives’ implementation to date, and on the other hand, generating lessons learned and recommendations to inform the remainder of the strategic period, and the preparation of the next strategic cycle. To put the implementation of the strategy into context, the review should start with an exploration of the shifts that have taken place in the global health landscape since the 2023-2027 Strategy was developed, and should look at the related challenges and opportunities for the organization. In particular, the review should be undertaken through a lens that recognizes the increasingly constrained funding environment for all global health initiatives, including Unitaid, and should serve to inform prioritization and trade-offs within the organization’s strategy and investment areas.

Principal Area 1: (Cross-cutting) Shifting context – relevance and coherence of Unitaid’s strategy; challenges and opportunities: To explore the shifts in the global health landscape, the associated challenges and opportunities, and their impact on the relevance and coherence of Unitaid’s strategy. Provide analysis and recommendations on:

- i. To what extent does Unitaid’s strategy remain relevant in this changing context?
- ii. To what extent does Unitaid’s work continue to complement that of other actors?
- iii. What challenges do these shifts pose for the organization and how can these be overcome?
- iv. What opportunities does the shifting landscape offer Unitaid, given its position and comparative advantage?

Principal Area 2: Strategy implementation: To assess overall progress to date to deliver upon the 2023-2027 strategy, including its:

- i. Strategic objectives: To what extent is Unitaid on track to meet its strategic objectives and targets? What strategic adjustments may be needed?
- ii. Operational objectives: To what extent is Unitaid on track to meet its operational objectives and targets? What operational adjustments may be needed?
- iii. Strategic principles: To what extent is Unitaid adhering to/applying its strategic principles in the design and implementation of its investments (incl. through the strategic initiatives)? What areas need to be strengthened?
- iv. Comparative advantage: To what extent has Unitaid demonstrated its comparative advantage as a ‘pathfinder, investor and influencer’? To what extent is its role understood, recognized, and sought after by external stakeholders?

Principal Area 3: Change initiatives implementation: To assess overall progress to advance the strategic and operational initiatives emerging from Unitaid’s last functional review, identify key lessons and any adjustments needed (with emphasis on the 5 strategic initiatives):

- i. Five strategic initiatives: To assess progress made to advance the strategic initiatives, as well as Unitaid’s comparative advantage and the potential to mobilize resources to support these work areas on an ongoing basis.
- ii. Operational initiatives: To assess progress made to improve work-planning; increase effectiveness, efficiency and reduce workload; strengthen resource mobilization; and build organizational capacity to address existing and emerging needs.

2.3 Key questions

Review Area	Review Sub-Area	Key Questions
<p>1. (Cross-cutting) SHIFTING CONTEXT – RELEVANCE AND COHERENCE OF UNITAID’S STRATEGY; CHALLENGES AND OPPORTUNITIES</p>	<p><i>To document the shifts that have taken place in the global health landscape since the development of the 2023-2027 Strategy and to provide analysis and recommendations on the resulting opportunities and challenges for Unitaid, including on the relevance and coherence of Unitaid’s strategy</i></p>	<ul style="list-style-type: none"> + What have been the main shifts in the external environment in which Unitaid operates since the development of the 2023-2027 strategy? + To what extent does Unitaid’s strategy remain relevant in this changing context? + To what extent does Unitaid’s work continue to complement that of other actors? + What adjustments might Unitaid need to make to ensure the continued relevance and coherence of its strategy in the remaining strategic period, as well as beyond? + What challenges does the shifting context pose for the organization and how can these be overcome? + What opportunities do these shifts offer Unitaid, given its position and comparative advantage? + To what extent is Unitaid appropriately adapting its resource mobilization approaches to ensure that it can continue to carry out its mandate? + What adjustments might Unitaid need to make to ensure it responds effectively and efficiently to these challenges and/or opportunities?
<p>2. STRATEGY IMPLEMENTATION</p> <p>To assess overall progress to date to deliver upon the 2023-2027 strategy</p>	<p><u>Strategic Objectives</u></p> <p><i>To what extent is Unitaid on track to meet its strategic objectives and targets? What strategic adjustments may be needed?</i></p>	<ul style="list-style-type: none"> + What progress has been made across Unitaid’s portfolio to meet its overall objectives and targets across the three strategic objectives? What factors have facilitated or inhibited progress? + How effectively has Unitaid operationalized its programmatic priorities (incl. defining and tracking its objectives at the programmatic priority level)? + To what extent does Unitaid’s performance framework support the measurement of progress towards meeting the 2023-2027 Strategic objectives? + How effective has Unitaid been in fostering inclusive and demand-driven partnerships for innovation, including with affected communities, governments and country stakeholders, as well as through global alliances? + To what extent are Unitaid’s investments responsive to community and country needs? What adjustments might be needed to further strengthen Unitaid’s approaches in this respect? + What progress has been made in facilitating demand, adoption and scale-up of key Unitaid-supported products and how sustainable are these gains? What have been the main factors influencing the adoption and scale-up? + What are the key gaps or risks across the three strategic objectives?

Review Area	Review Sub-Area	Key Questions
		<ul style="list-style-type: none"> + What are the key lessons learned and what adjustments are needed to deliver on the strategic objectives?
	<p><u>Operational Objectives</u></p> <p><i>To what extent is Unitaid on track to meet its operational objectives and targets? What operational adjustments may be needed?</i></p>	<ul style="list-style-type: none"> + What progress has been made to meet Unitaid’s operational objectives and targets? What factors have facilitated or inhibited progress? + How well-suited, responsive and effective is Unitaid’s operating model to delivering the objectives of the strategy in a shifting global health context? + How effective has Unitaid been in raising required resources to implement its strategy; what other opportunities are there for Unitaid to tap into? + What further steps are needed for Unitaid to reach its targets for staff and implementer diversity, equity and inclusion? + What are the key lessons learned and what adjustments are needed to deliver on the operational objectives?
	<p><u>Strategic Principles</u></p> <p><i>To what extent is Unitaid adhering to/applying its strategic principles in the design and implementation of its investments? What areas need to be strengthened?</i></p>	<ul style="list-style-type: none"> + To what extent has Unitaid successfully mainstreamed its strategic principles across its operating model and investment decisions? + How successful has Unitaid been in prioritising equitable, intersectional and people-centred approaches across its operating model, incl. in the Secretariat? + What are the lessons learned and what areas need further strengthening?
	<p><u>Comparative Advantage</u></p> <p><i>To what extent has Unitaid demonstrated its comparative advantage as a ‘pathfinder, investor and influencer’ and its role is understood by external stakeholders?</i></p>	<ul style="list-style-type: none"> + To what extent has the implementation of the strategy demonstrated Unitaid’s comparative advantage as a ‘pathfinder, investor and influencer’? How can Unitaid further capitalize on these three roles and the balance between them (e.g., in terms of Secretariat staff time and resource allocation) to maximize impact and value for money? + To what extent has the expansion of investment scope (into areas such as maternal, newborn and child health, global health emergencies, oxygen) capitalized on Unitaid’s comparative advantage? + Is there anything that Unitaid should be doing differently (including in its approach to scalability) to: i) ensure these programmatic areas deliver the highest possible impact, and ii) Unitaid’s role and value-add in these areas is recognized?

Review Area	Review Sub-Area	Key Questions
3. CHANGE INITIATIVES IMPLEMENTATION To assess overall progress to advance the strategic and operational initiatives emerging from Unitaid's last functional review	<u>Strategic Initiatives (SIs)</u>	<ul style="list-style-type: none"> + What has been the progress on the implementation of the five SIs against their work plans and intended targets? What factors have facilitated or inhibited progress? + To what extent has each of the SIs demonstrated a clear comparative advantage for Unitaid to deliver results and achieve its strategic objectives? + To what extent have the SIs increased visibility, mobilized resources, and opened pathways for potential resource mobilization for Unitaid? + What are the key lessons learned? Considering all of the above (progress, challenges, comparative advantage, resource mobilization potential, lessons learned), how should Unitaid take these initiatives forward?
	<u>Operational Initiatives</u> <i>To assess progress made to improve work-planning; increase effectiveness, efficiency and reduce workload; strengthen resource mobilization; and build organizational capacity to address existing and emerging needs</i>	

3. Review methodology and guiding principles

3.1 Methodology

The review will rely on a rigorous mixed-methods approach that employs both quantitative and qualitative analysis and makes use of primary and secondary data sources to potentially include but not be limited to document review, meta-analysis of existing Unitaid performance information, contribution analysis, strategic analyses, best practice analyses, case studies, stakeholder consultations, etc. Methodological rigor will be given significant consideration in the assessment of proposals. The reviewers are expected to outline their proposed methodology in detail including mapping of suggested methods and data sources by the key questions of the review.

In addition, the reviewers are expected to develop and apply rubrics to assess strength of evidence, strength of effect, and level of contribution to inform analysis and reporting of findings. The proposal should outline options for how qualitative information will be triangulated and analyzed in a robust way to generate findings and insights from a diverse set of stakeholder feedback and information. The final choice of methodology will be subject to the decision of the Unitaid Secretariat.

Theory of change: Unitaid considers its theory of change to be implicit in the 2023-2027 Strategy, particularly, in the overall strategic framework, comprising of three strategic objectives, and the positioning of Unitaid as a ‘Pathfinder’, ‘Investor’, and ‘Influencer’. This articulates ‘what’ Unitaid seeks to achieve. As such, the need to develop something additional for purposes of the review is left to the reviewers’ discretion.

Document review: A number of documents, including Secretariat-generated performance analyses and stakeholder survey results, will fall within the scope of the review and will be shared with the reviewers. The review should go beyond these analyses to generate information that is additional and complementary. Key data sources are listed in Appendix 1. It will be critical that the review consider and reflect other external sources and literature to capture the evolving global health context, Unitaid’s potential positioning in this context, and potential opportunities and risks. The proposal should outline how documents will be reviewed and analyzed.

Stakeholder consultations: The review will feature targeted consultations with a diverse range of internal and external stakeholders, including technical partners, communities and civil society, government partners, Unitaid Executive Board members, Unitaid implementers, Unitaid Secretariat, etc. (Refer to the table below for an illustrative list). The reviewers are expected to focus consultations with each group on where they are best placed to contribute as per the key questions, areas for analysis, and guiding principles. The proposed approach will be complemented by a stakeholder mapping provided by the Secretariat during the onboarding of the successful bidder.

With respect to stakeholder engagement, Unitaid already undertakes periodic surveys of different stakeholder groups; any stakeholder consultations should be additive and complementary to this information. Several of these surveys fall within the timeframe of this review, including a staff survey and partner survey to be undertaken in early 2025, and an implementer survey to be conducted in Q2 2025. The partner survey will include community organizations, civil society, countries (Ministries of Health), and scale funders.

Stakeholder group	Description
Unitaid Executive Board	Unitaid Executive Board members and their wider delegations
Unitaid Secretariat	Senior management and representatives from various functional and strategic initiative teams

Stakeholder group	Description
Unitaid implementers	Executives and project directors from a representative mix of Unitaid implementing partners (in terms of grant size, number of grants, years of experience engaging with Unitaid, and disease area)
Communities and civil society	Representatives at global, regional and national levels from civil society organizations and community groups that reflect Unitaid’s investments with regard to disease area and type of investment
Country governments	Key decision makers within Ministry of Health and other relevant ministries; countries selection should consider the extent of Unitaid’s portfolio, disease area, and region (Africa, Asia, Latin America), among others. Countries where Unitaid has an extensive portfolio and/or a formal agreement should be prioritized (e.g. Brazil, India, Kenya, Nigeria, South Africa)
Funding partners	Global Fund, President’s Emergency Plan for AIDS Relief (PEPFAR OGAC, CDC, USAID), President’s Malaria Initiative, Global Financing Facility, GHIT, Green Climate Fund
UN agencies	WHO, UNICEF, UNFPA, and other relevant agencies
Technical partners	Global, regional, and country-based technical partners or technical working groups relevant to Unitaid’s core areas of work (HIV, Tuberculosis, Malaria, Co-infections, MNCH, Oxygen)
Private Sector	Representatives of the private sector, including diagnostic and treatment manufacturers that Unitaid funds directly or indirectly
Other	Academic institutions, innovation partnerships, among others

The reviewers are requested to dedicate a larger proportion of consultations to external stakeholders and partners and to use focus group discussions where relevant. Further, the proposal should demonstrate a meaningful plan for engagement with civil society and community groups.

3.2 Guiding principles

The design and implementation of the review should be guided by three overarching principles:

1. **Simplicity**: the review implementation and deliverables should be focused, clear, succinct and conclusive.
2. **Complementarity and additionality**: the review should generate information that will be in addition to the wide range of performance-related and other evidence produced by the Secretariat.
3. **Pragmatic and action-oriented**: the review should comprise specific, feasible and actionable recommendations that can be applied in a timely manner using existing resources of the Secretariat.

4. Review timeframe and phasing, place of work, and management

4.1 Timeframe and phasing

Given differing levels of maturity of Unitaid’s strategic and operational change initiatives and to allow for more implementation time before these are assessed, the review will employ a phased implementation approach, as follows:

- **Inception phase: February – March 2025**
- **Phase 1: March – July 2025**
Focus on principal areas 1 and 2 (shifting context; strategy implementation), with interim findings and recommendations to be presented to the Policy and Strategy Committee (April / May 2025),

ahead of Unitaïd’s annual update on overall strategy implementation to its Executive Board (June 2025).

- **Phase 2: July – October 2025**
Focus on principal area 3 (change initiatives), with view to make recommendations to inform decision making on the way the strategic initiatives will be taken forward. Combined findings from Phase 1 and 2 to be presented at Policy and Strategy Committee meeting (October 2025).
- **Conclusion phase: October – December 2025**
Overall synthesis of key findings and lessons learned, recommendations, and dissemination.

4.2 Place of work

It is expected that work under this review will take place primarily remotely, with some in-person meetings with the Unitaïd Secretariat in Geneva to be considered at key junctures of the review (e.g., kick-off/inception phase, interim findings at mid-point and final findings). In addition, the reviewers should consider where in-person consultations with key country stakeholders might be warranted. Unitaïd expects these to be carried out by local review team representatives rather than requiring international travel, in line with Unitaïd’s effort in reducing carbon footprints related to procurement activities.

4.3 Management and communication

The review will be coordinated by the Unitaïd Secretariat, with oversight from the Policy and Strategy Committee of the Unitaïd Executive Board. **Unitaid will take an active part in the review process to ensure it progresses efficiently and effectively, fully leverages all the information already available and focuses on the issues of highest learning potential for Unitaïd.**

In addition to providing an interim and final report, and sharing the final report with all key informants, the reviewers will be expected to:

1. Participate in an initial briefing to introduce the reviewers to the Policy and Strategy Committee and to align on the high-level workplan and how the Committee will be engaged (February 2025);
2. Present the proposed approach, methodology and workplan for the review to the Policy and Strategy Committee (March 2025);
3. Present interim findings and recommendations from Phase 1 to the Policy and Strategy Committee (April / May 2025);
4. Present full findings and recommendations from Phase 1 and 2 to the Policy and Strategy Committee (October 2025).

5. Qualifications and skills

The successful bidders will propose a multi-disciplinary team of experienced reviewers, including the team leader. The team leader must have at least 15 years of experience leading strategic reviews of a similar scope and complexity and a strong understanding of the global health landscape and interventions to increase equitable access to health products in low and middle-income countries (LMICs). Core team members should have at least 5 years of individual experience in their respective areas of technical expertise.

The proposed review team shall meet the following requirements:

- Experience conducting strategic reviews in the field of global health, with a focus on innovation and catalytic investments;
- Significant experience in evaluations and reviews (at least 15 years for team leader and at least 5 years for other team members), with evidence of understanding of evaluation global standards, approaches, and methods.
- Substantive knowledge of the Unitaïd core disease areas (HIV and co-infections, Tuberculosis, Malaria, Cervical Cancer and MNCH) across the cascade of care – prevention, diagnosis and

treatment - and expertise in product introduction, market access and inherent challenges in scaling up;

- Strong understanding of emerging topics in the global health response (for example: climate and health, local and regional manufacturing, pandemic preparedness and response) and emerging topics relevant to each;
- Expertise in global health architecture and governance, including the main drivers, influential actors and how it is evolving, including knowledge of other relevant organizations' approaches, practices and processes (including civil society);
- Include an appropriate representation with regard to sex, a broad mix of backgrounds, skills and perspectives, and national and international experience, including in resource-limited settings;
- Strong inter-personal skills and ability to engage effectively with senior stakeholders;
- Strong commitment to delivering timely and high-quality results, i.e., credible evaluations/reviews that are used to improve strategic decisions;
- Proficiency in English and French (knowledge of other UN languages an asset); final deliverables must be submitted in English;
- *(Desirable)* Familiarity with Unitaid and its operating model;
- *(Desirable)* Presence or existing network of contacts in countries where Unitaid has an extensive portfolio and/or a formal agreement (e.g. Brazil, India, Kenya, Nigeria, South Africa)

It is vital that the same individuals who develop the methodology for the proposal are involved in conducting the review. In scoring the proposals, significant weighting will be given to the quality, experience and relevance of individuals who will be involved in the review, alongside the consideration of the proposed methodology.

In light of the sensitive nature of the review and the corresponding need for the findings and recommendations to be as credible and useful as possible, it is imperative that the selected team of reviewers be unencumbered by relationships with entities of any kind that might hinder an impartial, objective assessment of the topic under review, or by involvement in the Unitaid strategy development, strategy implementation or functional review processes. Accordingly, members of the proposed/selected team will be required to sign a conflict-of-interest disclaimer which attests to the absence of any such encumbrances.

6. Timeline and Deliverables

The review will run over the course of 11 months with deliverables to be submitted within the following indicative timeline.

Deliverable	Timeframe
1. Inception report outlining the process for the review including approach and methodology, work plan and timeline, interview guides and list of key informants	March 2025
2. Presentation to the Policy and Strategy Committee of proposed approach, methodology and workplan for the review	March 2025
3. Presentation to the Policy and Strategy Committee of interim findings and recommendations (Phase 1)	April / May 2025
4. Presentation to the Policy and Strategy Committee of overall findings and recommendations (Phase 1 and 2)	October 2025
5. Final Report on findings and recommendations, integrating feedback from the Secretariat and Policy and Strategy Committee	November 2025

7. Budget

Unitaid is an Organization that is dependent on the budgetary and extra-budgetary contributions it receives for the implementation of its activities. Bidders are, therefore, requested to propose the best and most cost-effective solution to meet Unitaid requirements, while ensuring a high level of service.

All bidders are expected to submit their proposed budget in the Financial Proposal (Annex 5 of the RFP). It is preferred that firms have either a regional/local presence in the target countries or have access to local counterparts that can assist the Reviewers in understanding the local context and arranging interviews.

8. Payment terms and schedule

Basis for Payment	Payment Percentage
1. Upon satisfactory completion of Inception report and presentation to the Policy and Strategy Committee and acceptance by Unitaid	20% of Professional Fee
2. Upon satisfactory completion of presentation of interim findings and recommendations to the Policy and Strategy Committee and acceptance by Unitaid	25% of Professional Fee
3. Upon satisfactory completion of presentation of overall findings and recommendations to the Policy and Strategy Committee and acceptance by Unitaid	25% of Professional Fee
4. Upon satisfactory completion of Final report and acceptance by Unitaid	30% of Professional Fee

For professional fees, payment will be made following satisfactory completion of the ToR and of corresponding detailed invoices, along with a Financial Statement (using the template to be provided by Unitaid in due course) detailing the actual level of effort incurred and breakdown of travel expenses, if any.

For travel costs (subject to agreement with Unitaid), payment will be made in accordance with WHO rates and upon submission of invoices indicating actual travel costs with proof of payment. The selected bidder is responsible to organize all logistics of travel, including hotel booking and local transportation. All travels must be arranged in the most economical way, in line with Unitaid's effort in reducing carbon footprints related to the procurement activities.

Appendices

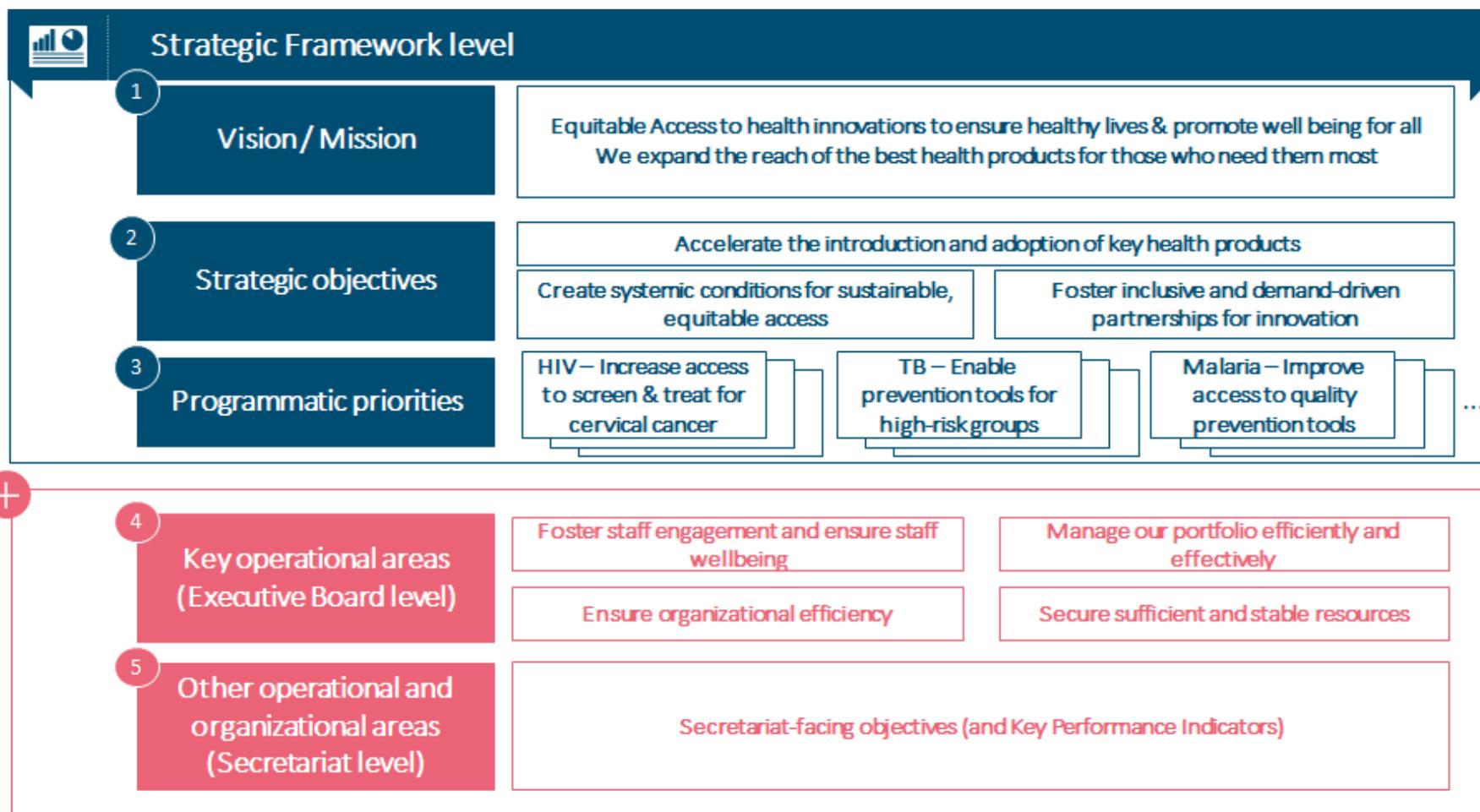
1. Overview of data sources by review sub-area
2. Unitaid 2023-2027 Strategy Performance Framework
3. Unitaid 2023-2027 Key Performance Indicators
4. Change Initiatives Arising from Unitaid Functional Review (2022)
5. Strategic initiatives mapped against Unitaid's strategic objectives and principles
6. Strategic Initiatives – theories of change and targets

Appendix 1. Overview of existing Unitaid data sources (non-exhaustive) by review sub-area

Review Sub-Area	Key Data Sources (non-exhaustive)
<p><u>GENERAL</u></p>	<ul style="list-style-type: none"> • Unitaid 2023-2027 Strategy • Unitaid 2023-2027 KPIs • Strategy Implementation Plan • Unitaid Evaluation Framework • Unitaid Scalability Framework • Executive Director reports to the Executive Board • Report on KPI revisions (+ resolutions) • Relevant Functional Review documentation
<p><u>Shifting Context; Relevance & Coherence of Unitaid’s Strategy</u></p> <p><i>To document the shifts that have taken place in the global health landscape since the development of the 2023-2027 Strategy and to provide analysis and recommendations on the resulting opportunities and challenges for Unitaid, including on the relevance and coherence of Unitaid’s strategy</i></p>	<ul style="list-style-type: none"> • Unitaid 2023-2027 Strategy • Relevant Functional Review documentation • Investment plans • Areas for Intervention documents
<p><u>Strategic Objectives</u></p> <p><i>To what extent is Unitaid on track to meet its strategic objectives and targets? What strategic adjustments may be needed?</i></p>	<ul style="list-style-type: none"> • Strategy implementation reports • Strategic KPI reports • Programmatic priority reports • Partner surveys • ROI analysis • Investment plans • Areas for Intervention documents • Evaluations, incl. Unitaid 2017-2021 Strategy Review
<p><u>Operational Objectives</u></p> <p><i>To what extent is Unitaid on track to meet its operational targets? What operational adjustments may be needed?</i></p>	<ul style="list-style-type: none"> • Strategy implementation reports • Organizational KPI reports • Implementer surveys • Staff surveys • Resource mobilization and communication updates to the Executive Board
<p><u>Strategic Principles</u></p> <p><i>To what extent is Unitaid adhering to/applying its strategic principles in the design and implementation of its investments? What areas need to be strengthened?</i></p>	<ul style="list-style-type: none"> • Investment plans • Investment prioritization framework • Investment recommendation overviews / Executive Summaries to Executive Board
<p><u>Strategic Initiatives</u></p>	<ul style="list-style-type: none"> • Relevant background documents on the SIs conceptualization and phased approach • For each SI: Theory of change and targets

Review Sub-Area	Key Data Sources (non-exhaustive)
<p><i>To assess Unitaid’s comparative advantage and the potential to mobilize resources to support these work areas on an ongoing basis</i></p>	<ul style="list-style-type: none"> • Climate and health strategy (and performance framework) • Regional Manufacturing for Equitable Access (RMEA) Area for Intervention document • Issue briefs • From Milligrams to Megatons report • Access is not an Afterthought • Updates on SI implementation to Executive Board
<p><u>Operational Initiatives</u></p> <p><i>To assess progress made to improve work-planning; increase effectiveness, efficiency and reduce workload; strengthen resource mobilization; and build organizational capacity to address existing and emerging needs</i></p>	<ul style="list-style-type: none"> • Relevant Functional Review documentation • Updates to Executive Board

Appendix 2. Unitaid 2023-2027 Strategy Performance Framework



Appendix 3. Unitaid 2023-2027 Key Performance Indicators

Level	Metric	Definition	Target	Data sources	Reporting frequency
Mission					
	Impact 1 – Public Health impact	Total infections or cases averted and/or Total deaths averted from key health products supported by Unitaid	N/A – based on modelling estimates	Scale funder data (e.g., procurement data, impact evaluation), programmatic priority data, Unitaid evaluations, WHO	Mid-term (2025) and end of strategic period (2027)
	Impact 2 – Economic savings or efficiencies	Total economic savings and efficiencies generated by key health products supported by Unitaid	N/A – based on modelling estimates	Scale funder data (e.g., procurement data, impact evaluation), programmatic priority data, Unitaid evaluations, WHO	Mid-term (2025) and end of strategic period (2027)
	Impact 3 – Return on Investment	Return on Investment = Total Projected Benefits realized from Unitaid investment / Total Projected Costs of Unitaid investment + scale-up costs	N/A – based on modelling estimates	Scale funder data (e.g., Global Fund investment case scenarios, procurement data, impact evaluation), programmatic priority data, Unitaid evaluations, WHO	Every 3 years (2025; 2028)
	Impact 4 – Accelerating the global health response	Acceleration time = Date of achieving reduction of mortality in global disease projections – Date of achieving reduction of mortality without access to innovation supported by Unitaid	N/A – based on modelling estimates	Scale funder data (e.g., Global Fund investment case scenarios, procurement data, impact evaluation), programmatic priority data, Unitaid evaluations, WHO	Every 3 years (2025; 2028)
Strategic objectives					
Strategic Objective 1 – Accelerate the introduction and adoption of key health products	1.1 – Portfolio evolution	Total number of new health products supported by Unitaid over the previous 12 months	N/A – no target. year on year increases and the overall cumulative amount tracked.	Grant Agreement Development packages approved by the Executive Board (in the timeframe in question, each year)	Annually (June)
	1.2 (a) – Overall Portfolio Health	Proportion (%) of key health products on track to meet their target access profiles = Total number of products on track to meet their target access profiles / Total number of target access profiles	Annual Target: at least 80% of products on track to meet their target access conditions	Portfolio update, target access profiles, market data, and data provided by partners (e.g., WHO)	Annually (June)
	1.2 (b) – Target Equity Conditions	Proportion (%) of key health products on track to meet their target equity conditions = Total number of key health products on track to meet their target equity conditions / Total number of key	Annual Target: at least 80% of products on track to meet their target equity conditions	Portfolio update, target access profiles, market data, and data provided by partners (e.g., WHO)	Annually (June)

Level	Metric	Definition	Target	Data sources	Reporting frequency
		health products with a target access profile			
	1.3 – Product uptake	A summary of achievement of key health products in three key dimensions of scale-up: <ul style="list-style-type: none"> • Magnitude of scale-up • Speed of scale-up • Equity of scale-up 	N/A – progress is tracked using a summary dashboard	Scale-up partner procurement data, national investment plans from countries, other strategic/investment documents	Annually (June)
Strategic Objective 2 - Create systemic conditions for sustainable, equitable access	2.1 – Creating systemic conditions for sustainable, equitable access	Demonstrated progress in devising plans, and where appropriate making investments, in areas intended to address SO2	Annual targets ² ; Ongoing target: On track to meet expectations of SIs [<i>refer to TOC and targets for each SI</i>]	Market data, technology landscapes, stakeholder analysis/reports	Annually (June)
	2.2 – Dissemination of evidence on equitable access	A summary of progress in generating evidence to support equitable access through: Studies delivered through Unitaid funded projects, published in peer reviewed journals in the previous calendar year, with emphasis on evidence at a disaggregated level	N/A: progress is tracked through a synthesis report, produced every year	Peer reviewed journals/publications, programmatic priority level data	Annually (June)
Strategic Objective 3 – Foster inclusive and demand-driven partnerships for innovation	3.1 – Partner Satisfaction	Proportion (%) of positive responses to the question - " <i>To what extent has your partnership with Unitaid fostered inclusive and demand-driven partnerships for innovation that has advanced equitable access to key health products?</i> "	Baseline performance in initial partner survey: <ul style="list-style-type: none"> -CBOs: 55% -CSOs: 50% -Overall: 57% 2027 target: 75% for all groups	Partner survey (which would be a new survey administered on behalf of Unitaid by an external consultant)	Every 2 years (2023, 2025, 2027)
	3.2 – Effective engagement with Communities and Civil Society	Proportion (%) of programmatic priorities with a demonstrated engagement with communities and civil society across the operating model	2022 baseline: 40% of PPs with 'strong/good' engagement 2027 target: progress towards 100% of priorities with strong/good engagement	Programmatic priorities	Annually (June)
	3.3– Effective Country	Engagement that supports – <ul style="list-style-type: none"> • Progress in aligning country stakeholder needs and priorities 	Demonstrable progress in advancing effective engagement with country	Internal, project-level data, Partner survey, mid-term/end of Strategy evaluation	Annually (June)

² Initial 2023 targets: - Advance work on IP and regulation, e.g., consider renewal of investment in the areas of TRIPS flexibilities and Prequalification by June 2023; - Undertake exploratory work on innovative supply models, to identify concrete opportunities by June 2023 (learning objective); - Establish a baseline and plans for the dissemination of knowledge on equitable access by June 2023

Level	Metric	Definition	Target	Data sources	Reporting frequency
	stakeholder engagement	<ul style="list-style-type: none"> • Spurs local ownership and fit-for-purpose innovations; increases use of and strengthens local health services, systems, research institutions and manufacturers; and • Accelerates buy-in, adoption and scale-up of better health products, improves sustainability and resilience and strengthens partnerships with Ministries of Health and regional bodies 	<p>stakeholders that leads to better alignment with country stakeholder needs and priorities for next investment cycles, additional partner agreements with Ministers of Health and Regional Bodies, and increased investments through low- and middle-income country institutions and manufacturers.</p> <p>This includes, in the context of the workplan agreed as an outcome of the Functional Review process:</p> <ul style="list-style-type: none"> • At least one (and up to four) country agreement(s) (Memorandum of Understanding) by mid-2025 • At least one (and up to two) flagship country visit(s), bringing together key stakeholders, by mid-2025 • Increased investment in low- and middle-income country organizations (e.g., captured through diversification of the implementer base, linked to Organizational KPI F, and increased focus on regional manufacturing) 		

Level	Metric	Definition	Target	Data sources	Reporting frequency
Organizational objectives					
Operational Objective – Ensure organizational efficiency	KPI A – Secretariat efficiency	<p>A0 - Secretariat Efficiency = Unitaid Secretariat costs / Value of Unitaid's portfolio (on 31 December in a given year) – to be retained for 2024 KPI reporting only. After this point, the information will continue to be reported to the Finance and Accountability Committee each year.</p> <p>A1 - Budget Implementation Rate (%) = Actual Budget Spend (in a given calendar year) / Total Budget (in a given calendar year) Staff Cost Allocation (%) = Proportion of staff costs allocated to Investments, Management, Business Development and Support functions</p> <p>A2 - Investment Commitment ratio (%) = Total Executive Board agreed grant commitments \$ (in a given calendar year) / Total Staff Cost \$ (Investment)</p> <p>A3 - Investment Disbursement ratio (%) = Annual disbursement value \$ (in a given calendar year) / Total Staff Cost (Investment FTE)</p>	<p>A0 – 2%</p> <p>A1 – 95% per annum, supported by demonstrable evidence of driving efficiencies from available resources</p> <p>A2 – N/A</p> <p>A3 – N/A</p>	<p>Internal Secretariat data</p> <p>Audited Financial Statements</p>	Annually
	KPI B – Secretariat Carbon Footprint	% reduction in the Unitaid Secretariat carbon footprint compared to the 2019 baseline	40% reduction of emissions by 2025, working towards a 50% reduction of emissions by 2030	<p>Internal Secretariat data</p> <p>Secretariat analysis, based on data from Carlson Wagonlit for travel, procurement data with internal analysis of emission factors, additional information as available (e.g., Global Health Campus activities, commuting survey etc.)</p>	Annually
Operational Objective – Secure sufficient and stable resources	KPI C – Resource Mobilization	<p>KPI C.1: Total cumulative US\$ resources committed over the strategic period (5 years)</p> <p>KPI C.2: % funds secured against multi-year agreements (in value)</p>	<p>KPI C.1: USD 1.5 billion (cumulative target over the strategic period)</p> <p>KPI C.2: 70% (annual target)</p>	Contributions are tracked internally by the Finance team in collaboration with the Executive Office and External Relations.	Annually

Level	Metric	Definition	Target	Data sources	Reporting frequency
		KPI C.3: Number of new donors over the strategic period (cumulative)	KPI C.3: 3 new donors (cumulative target over the strategic period)	Updates are provided to the joint PSC/FAC and reports to the Executive Board. Financial commitment information collated by the Resource Mobilization team.	
Operational Objective – Manage our portfolio efficiently and effectively	KPI D – Speed of grant development	KPI D.1: Average time taken from the Grant Agreement Development (GAD) kick-off to the GAD submission to the Board KPI D.2: Median time taken from the GAD kick-off to the GAD submission to the Board	KPI D.1 – 6 months on average KPI D.2 – no target	Internal Secretariat data	Annually
	KPI E – Grant implementers satisfaction	% Positive responses to Grant implementer survey question: ‘How would you rate your overall experience with Unitaid?’	75% overall positive feedback	Implementers Survey (administered by an external survey provider)	Annually
	KPI F - Grant implementers diversity	Proportion (%) of grants with a lead implementer that is from the ‘Global South’ (LICs & MICs)	End of strategic period target: 40%	Internal Secretariat data	Annually
Operational Objective – Foster staff engagement and ensure staff wellbeing	KPI G - Secretariat gender equality	Proportion (%) of women in management positions (including senior leadership and middle management levels)	Annual Target: 45%-55%	Internal Secretariat data	Annually
	KPI H – Staff satisfaction and wellbeing	KPI H.1: Level of Unitaid Secretariat staff satisfaction reported in the annual staff survey (5 questions) KPI H.2: ability for staff to manage their work-life balance, as reported in the staff survey	KPI H.1 – 75% positive KPI H.2 – 75% positive	Staff survey (administered by an external survey provider)	Annually

Appendix 4. Change Initiatives Arising from Unitaid Functional Review (2022)



Strategic Initiatives

1. Access: Leading partners across the ecosystem, combined with intensive analysis of the market and options, for priority products.

2. Climate and Health: Greening products, contributing to more resilient health systems (related to climate threats), and reducing Unitaid's carbon footprint.

3. Engagement with Communities, Civil Society, Countries, Other Donors and Strategic Partners: Engaging closely to ensure health products respond to people's needs and reflect national priorities and plans, while maximizing resources and promoting availability of products at scale, at the lowest cost.

4. Global Health Emergencies (PPPR): Driving innovation and change in PPPR by investing in sustainable market solutions that have synergies with existing work and Unitaid's programmatic priorities.

5. Regional Manufacturing: Investing in equitable supply chains for priority products, shaping regional architectures.

Operational Initiatives

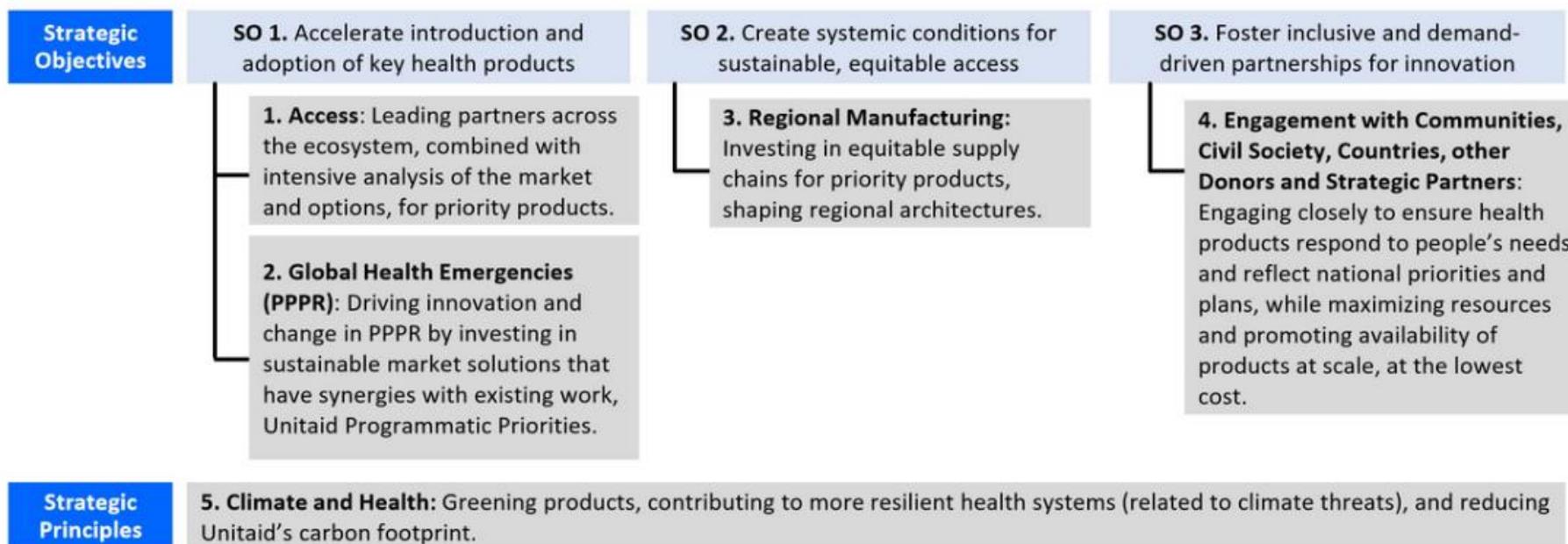
1. Strengthen annual organizational planning as a key function of a learning organization.

2. Implement a suite of functional review recommendations and internal stock-take observations to strengthen resource mobilization.

3. Implement a package of change initiatives related to grant making and grant management ways of working in order to increase efficiency and reduce workload.

4. Build organizational capacity so as to address existing workload challenges and new needs, both in core areas of work as well as the five areas strengthened in the 2023-2027 Strategy (ref. 5 Strategic Initiatives)

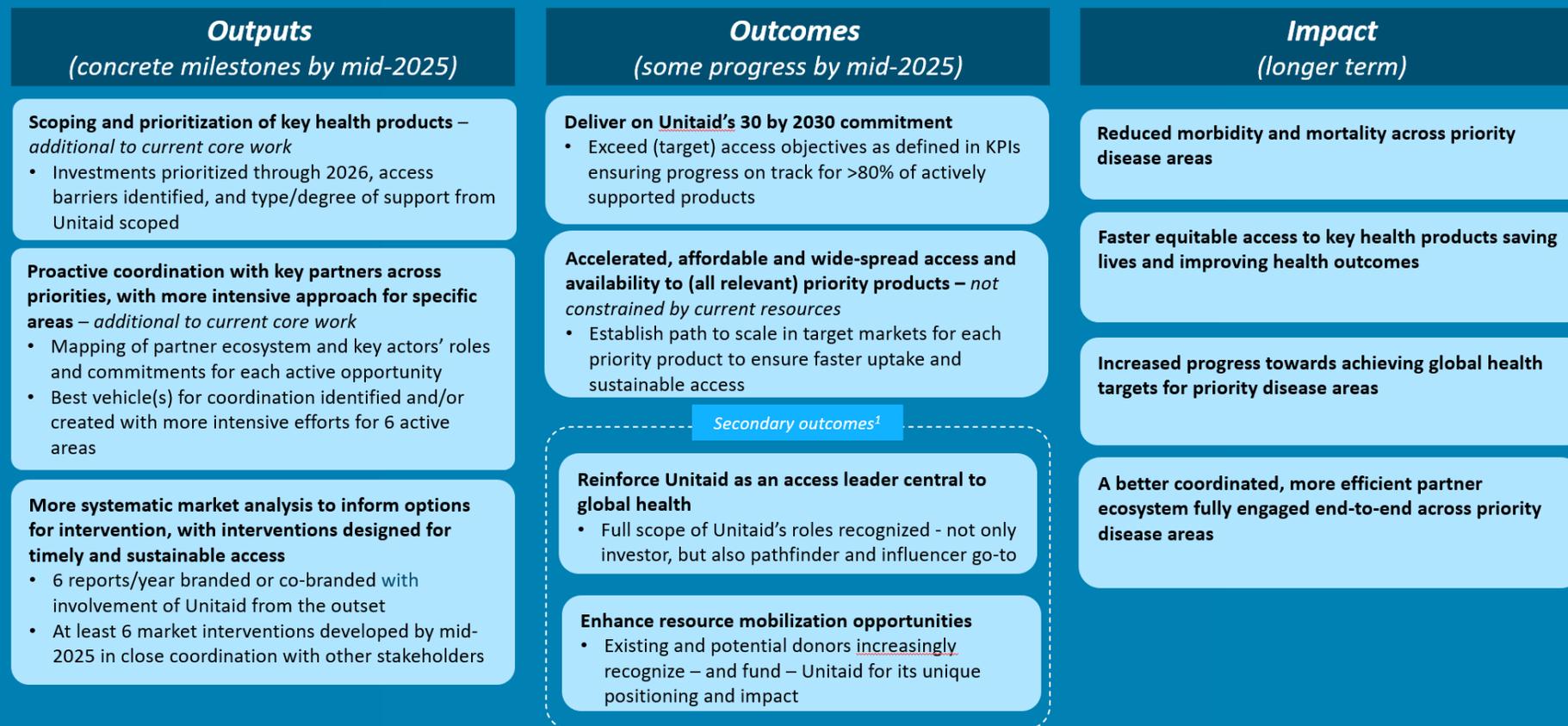
Appendix 5. Strategic initiatives mapped against Unitaid’s strategic objectives and principles



Appendix 6. Strategic Initiatives – theories of change and targets

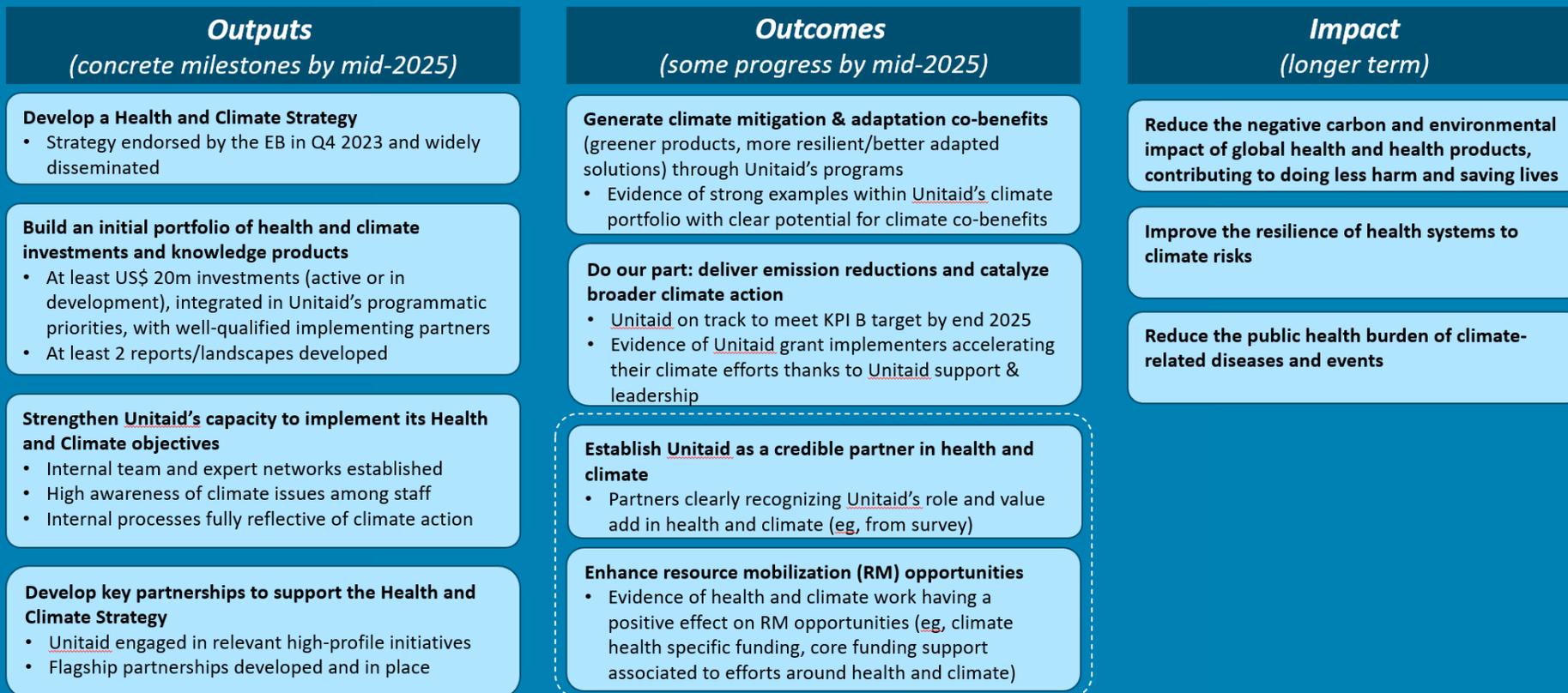
Please note that the below theories of change and targets are currently undergoing revisions; updated versions will be shared with the selected bidder during the onboarding process.

Theory of Change and targets for end 2026: Access



1. Secondary outcomes don’t contribute directly to impact, but are critical enablers as they reinforce Unitaid’s capacity and effectiveness in this area.

Theory of Change and targets for end 2026: Climate & Health

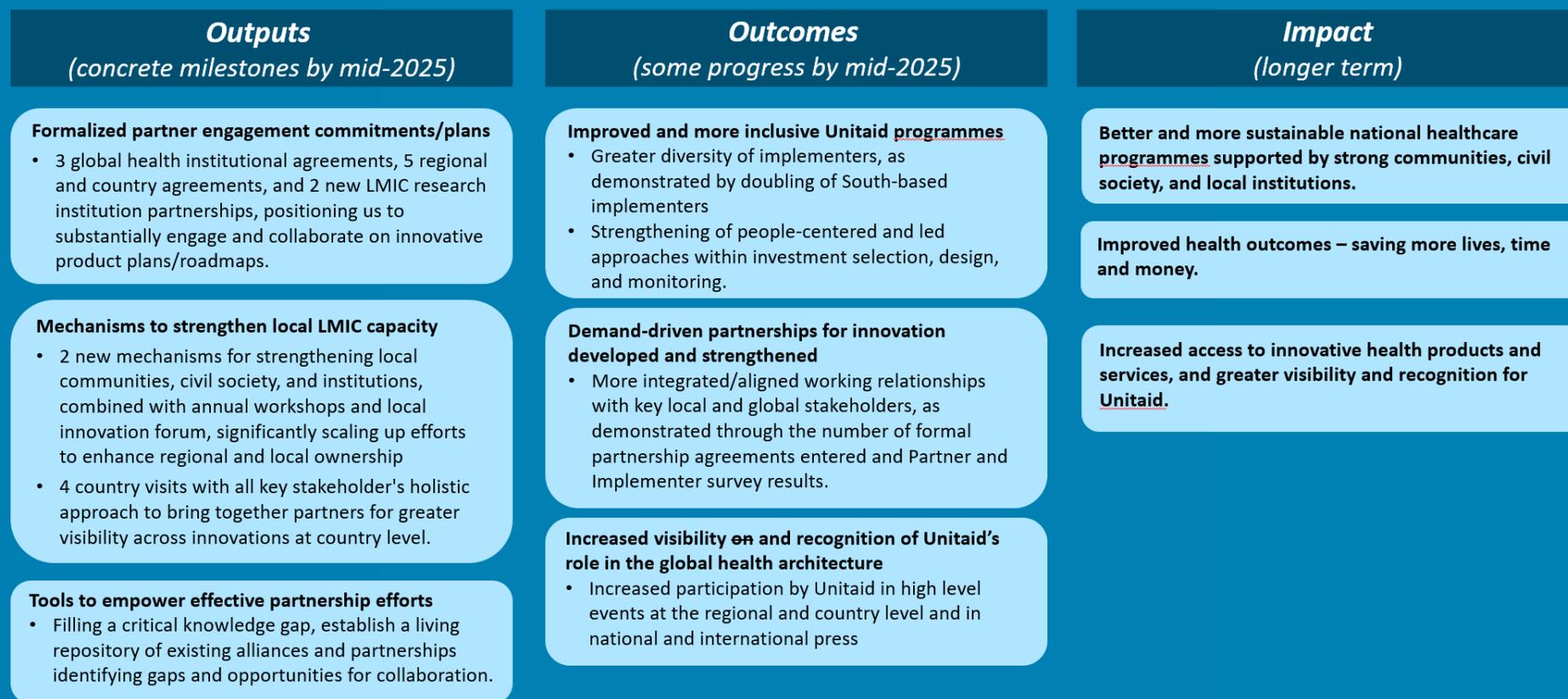


Secondary outcomes¹

2 1. Secondary outcomes don't contribute directly to impact, but are critical enablers as they reinforce Unitaid's capacity and effectiveness in this area
 NB: All targets (light blue text in *italics*) correspond to Mid-2025; they will be adjusted/refined based on the Health and Climate strategy in Q4 2023



Theory of Change and targets for end 2026: Partnerships

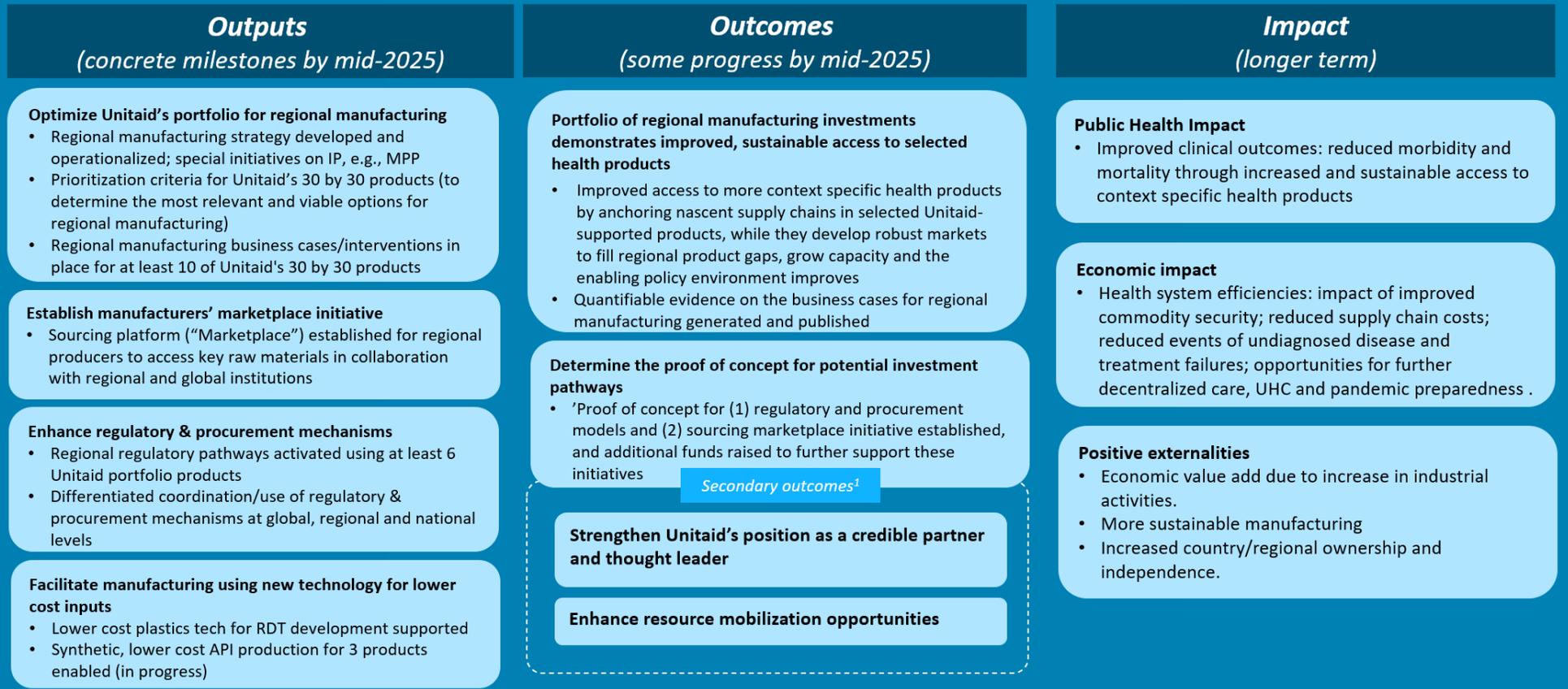


Theory of Change and targets for end 2026: Pandemic Prevention, Preparedness and Response

Outputs <i>(concrete milestones by mid-2025)</i>	Outcomes <i>(some progress by mid-2025)</i>	Impact <i>(longer term)</i>
<p>Investor: Address targeted access issues for pandemic-relevant health tools (investment portfolio with end-to-end view on access)</p> <ul style="list-style-type: none"> Invest to stabilize supply, grow demand, create markets for Tx (incl. O2 and biologics), Dx Address common opportunities in infectious disease, women's health and PPPR <p>[If a pandemic arises]</p> <ul style="list-style-type: none"> Address targeted access issues for pandemic-relevant health tools through targeted investments and as a channel for funding Simple packages of care and fast product introduction 	<p>Markets and LMIC health systems ready to weather pandemics effectively and fast</p> <ul style="list-style-type: none"> Increased capacity to respond to emerging threats through investments in multiple diseases and health priority areas Emergency task force transitioned to sustainable GO₂AL alliance; new investments to stabilize supply/increase access [If a pandemic arises] Resilient, equitable, sustainable markets created for relevant generics/biosimilars, and fit-for-purpose products compatible with simplified care 	<p>Improved public health impact in LMICs during – and between – pandemics:</p> <ul style="list-style-type: none"> Reduced mortality and severe disease Reduced disease transmission Reduced mortality from other diseases (test-and-treat, quality and continuity of care)
<p>Influencer: Ensure global architecture and ecosystem facilitates accelerated LMIC access</p> <ul style="list-style-type: none"> Champion early consideration of equitable access, market shaping, and end-to-end coordination Identify access gaps and pathways early (underfunded areas; geographic equity; flexible & inclusive coordination) 	<p>LMIC-led strategic priorities with effective support from coordinated global health actors</p> <ul style="list-style-type: none"> Faster and broader IP-sharing, tech transfer and price transparency for pandemic priorities 	<p>Minimized LMIC economic and social impact of pandemics and accelerated recovery</p>
<p>Pathfinder: Identify barriers and pathways for access to key PPPR tools</p> <ul style="list-style-type: none"> Develop roadmaps for end-to-end PPPR approach <p>[If a pandemic arises]</p> <ul style="list-style-type: none"> Identify access barriers and tailor roadmaps for priority products 	<p>[If a pandemic arises]</p> <p>LMICs access adequate and affordable health tools when needed</p> <ul style="list-style-type: none"> LMICs are well-positioned to address own priorities at the same time as HICs Effective support from coordinated global health actors, with country stakeholders driving adoption (inc. communities, CSOs) 	<p>Improved equitable access to health tools for LMICs for non-pandemic diseases</p>
	<p>Unitaids central role in global health reinforced</p> <ul style="list-style-type: none"> Unitaid's roles and access leadership recognized – and built into global health response <p>Resource mobilization opportunities enhanced</p> <ul style="list-style-type: none"> Existing and potential donors increasingly recognize – and fund – Unitaids for its unique positioning and impact 	<p>A coordinated, efficient partner ecosystem fully engaged end-to-end and able to respond in real-time</p>

Secondary outcomes

Theory of Change and targets for end 2026: Regional Manufacturing



5 1. Secondary outcomes don’t contribute directly to impact but are critical enablers as they reinforce Unitaid’s capacity and effectiveness in this area.