

REQUEST FOR PROPOSAL (RFP)

**DIAGNOSTIC MARKET LANDSCAPE OF DELIVERY CHANNELS: THE PHARMACY
(BRICK & MORTAR, E-PHARMACY) AND E-COMMERCE CHANNEL IN INDIA,
INDONESIA, THE PHILIPPINES AND NIGERIA**

PUBLICATION REFERENCE

RP22-0029

PUBLICATION DATE

7 DECEMBER 2022

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LIST OF ACRONYMS AND DEFINITIONS

Acronym	Definition
LMIC	Low and Middle Income Country
OTC	Over the Counter
RDT	Rapid Diagnostic Test
POC	Point of Care

BACKGROUND INFORMATION

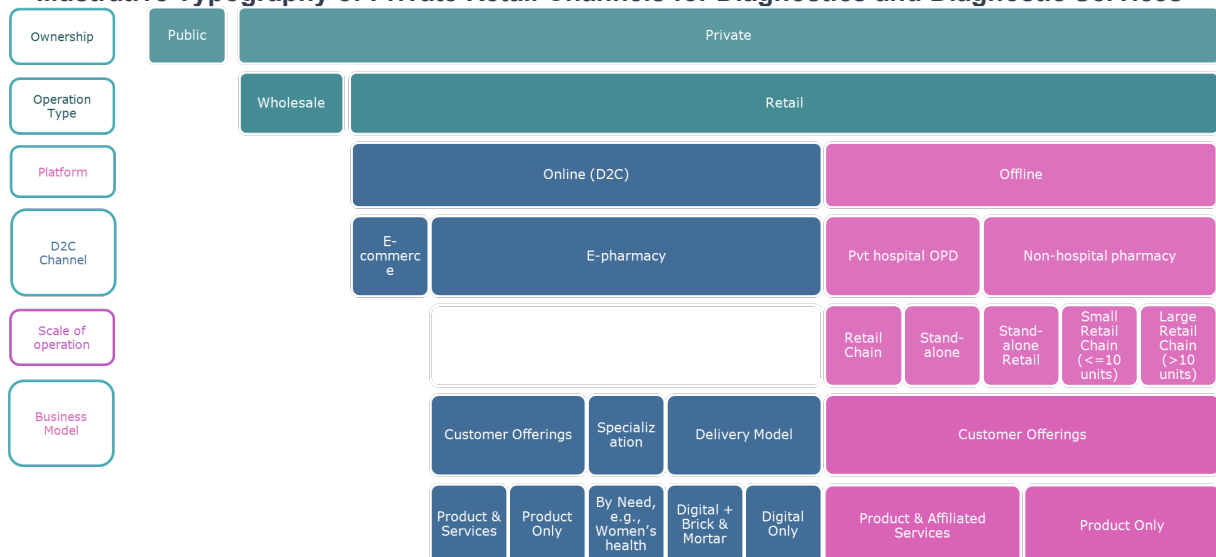
Private channels for decentralized access to rapid professional use or self-testing diagnostic tools

The COVID-19 pandemic highlighted the importance of decentralizing access to diagnostics within health systems. Empowering end-users with multiple options for seeking diagnosis - both through professional point of care solutions and self-administered tests - is key to delivering timely cost-effective access to care, responsive public surveillance and a propelling the shift from curative models of care to proactive self-care models.

With increasing availability of POC testing solutions, the turn-around time for clinical diagnosis, potential access to treatment, and cost of population surveillance has drastically decreased. Low cost connectivity solutions have streamlined the remote management of test results. This has empowered patients and non-laboratory trained healthcare professionals to deliver care closer to the patient, expanding last mile access. Despite the progress towards simplification/ease of use, POC solutions in LMIC are still deployed in dedicated healthcare settings and their decentralization potential is not fully exploited.

Outside of the public sector, several B2B, B2C or C2C private delivery channels for diagnostics and diagnostic services can be leveraged to improve access to POC diagnostics. B2C pharmacies, both brick and mortar pharmacies and digital pharmacies, and e-commerce websites selling diagnostics and pharmaceutical product are preeminent examples of such delivery channels.

Illustrative Typography of Private Retail Channels for Diagnostics and Diagnostic Services



Source: FIND

“Brick and mortar” physical pharmacies

Brick and mortar pharmacies are a frequent first point of care seeking and, in many LMICs, the most frequently used point of care. With widespread physical presence, private brick and mortar retail pharmacies have an especially vital role to play in enhancing access to diagnostics in LMICs. Their geographical proximity, convenient and long operation hours, wide range of inventory, and lack of queues and consultation fees make them popular access points for medical services.

Online retail pharmacies

Digital pharmacies or e-pharmacies with their large-scale reach and capabilities can play a major role in lowering costs and improving access to care in underserved areas with the right business and regulatory incentives. They offer convenience and anonymity besides benefits for streamlining diagnosis and treatment for chronic ailments.

E-commerce platforms that retail OTC pharmaceutical products

E-commerce channels offer similar benefits as online retail pharmacies and are increasing across LMIC. Africa and Asia-based e-commerce players have entered the healthcare space, mainly through the sale of over-the-counter products—and many operate regionally. In sub-Saharan Africa, the number of health product distribution companies has doubled since 2018, from 28 to more than 60, with more than 40% of companies founded in the last three years. E-commerce giants like Konga, Copia, and Jumia show a strategic interest in health. In East Asia, Alibaba, Tata (1mg), and Flipkart have launched their own healthcare-focused marketplace models.

FIND Market Innovation Unit and Incubator

FIND's Market Innovation Unit leads efforts to ensure affordability, availability and awareness of diagnostics from product introduction to product scale up in the public and private sector. Our focus is on driving the availability of POC testing, i.e., OTC diagnostic products (assisted tests and self-tests, onsite sample collection and on site testing, through community channels and other avenues of diagnostic delivery that can enable diagnosis beyond formal health services and are closer to patients.

As part of this, the Incubator team launches viable, efficient and sustainable pilot projects and partnerships in private sector diagnostic distribution channels such as pharmacies. Our focus is on decentralizing access to new POC diagnostics via the pharmacy channel, brick and mortar and/or digital, by devising and implementing tailored market interventions with pharmacy stakeholders across the continuum.

OBJECTIVES

Objectives for D2C brick and mortar pharmacies and e-pharmacies

The objective of conducting a market landscape for brick and mortar and e-pharmacies is as follows:

1. Understanding of policy and regulatory landscape governing the brick and mortar and e-pharmacy channel:
 - a. Regulatory requirements to provide OTC diagnostic products for individual use, on-site sample collection and on-site testing
 - b. Current menu of assisted testing and self-testing products and services for individual use that are allowed to be sold
 - c. Reimbursement mechanisms & health system interaction, i.e., inter-linkages between physical and digital pharmacies and different components of the health system, e.g., health insurance, DHIS2, referral linkages, etc.
2. Understand a market view of each type of pharmacy channel, including:
 - a. Data from national data-sources to track whole market flows for OTC diagnostic products, including import-export data, sector-wise market audits and consumption data from household and health surveys, etc.
 - b. Market share (including names of pharmacies by type); including populations served; with the ability to segment the market by pharmacy type, population, rural/urban etc.
 - c. Assessment of existing offerings of diagnostic products and clinical and non-clinical services at pharmacies. This should include a complete market assessment of OTC products for individual use, on site sample collection and on site testing, including an

- analysis of their availability, market prevalence, affordability, quality assurance status, awareness about the product, marketing, packaging, etc.;
- d. Assessment of the willingness of pharmacies to provide on-site POC testing and affiliated services
 - e. Estimated demand and trends in the uptake of OTC diagnostic products and diagnostic services
3. Mapping of key brick and mortar and e-pharmacy market players, including pharmacies and pharmacy-affiliated organizations (e.g., pharmacy trade financiers, telemedicine providers, networks, etc.), with whom FIND can collaborate in scaling up access to diagnostics and affiliated services. This includes:-
- a. Organizational profiles of each of the market leaders identified
 - b. Market share of key pharmacy players
 - c. Active models of care and service delivery, and gaps in the market
 - d. A comparative profiling of key market player, including an analysis of their offerings and capabilities
 - e. Offerings/services of pharmacy affiliated organizations
4. Understanding key enablers and barriers along the continuum in scaling up access to diagnostics and affiliated services via the brick and mortar and e-pharmacy channel.

Objectives for e-commerce channels:

1. Understanding of policy and regulatory landscape governing the e-commerce channel:
 - a. Are professional point-of-care solutions and self-administered test authorized to be commercialized through this channel?
 - b. If yes, regulatory requirements that should be observed to comply with local regulations around sale of diagnostic products, including professional tests and self-tests
 - c. Current menu of diagnostic products and services that are allowed to be sold
2. Understand a holistic market view of the e-commerce channels:
 - a. B2B, B2C, C2C channels according to:
 - Market segments served
 - Diagnostic product diversity, particularly professional point-of-care solutions and self-administered test (including ability to bundle and upsell cross-category)
 - Geographic reach
 - Distribution channels (i.e., 3PL, pharma, agents etc.)
 - Marketing strategies (AdWords, newsletter, influencer, agents etc.)
 - Product quality and SOP for quality assessment in place
 - Product pricing
 - Key distribution partnerships
 - Market gaps
 - b. From a company level, organization profiles that include:
 - Market share
 - Product and service offerings segmented by clinical and non-clinical categories
 - Product pricing
 - Product quality
 - Website traffic data (user acquisition cost and conversion rate)
 - Positioning and messaging
 - Company growth and trajectory
 - Key distribution partnerships
3. Understand the key enablers and barriers along the continuum in scaling up access to diagnostics through e-commerce channels
4. It is important that the analysis/outcomes of a landscape not only look at competition between e-commerce channels - but also distribution mechanisms outside of that (pharmacies, black market etc.)

DESCRIPTION OF THE ASSIGNMENT (SCOPE OF WORK) & RECOMMENDED METHODOLOGY

The consultant/organization will conduct a landscaping of each of the channels using a holistic market approach with a mix of quantitative and qualitative methods. The data collected should provide an

accurate and well-rounded view of the whole market, emerging from a combination of [supply](#) and consumer market analysis.

Keeping in mind the objectives laid out, the selected contractor is expected to:-

1. Prepare an inception report demonstrating understanding of requirements of the landscape exercise, outline of the report, methods of data collection, workplan and timelines
2. Develop a general framework or typography classifying different pharmacy and e-commerce types against which the landscaping and data collection will be conducted
3. Develop a research methodology to collect quantitative and qualitative market information and identify relevant stakeholders for primary interviews and prepare interview tools
4. Generate/determine quantitative data related to market shares of key players, penetration of different pharmacy and e-commerce types, availability of professional point-of-care solution and self-administered tests, OTC diagnostic products and on-site testing solutions, customer demand, trends etc.
5. Conduct desk review and analysis of key players, prevalent pharmacy-centric and e-commerce models for diagnostics, market gaps in professional point-of-care solution and self-administered tests POC, OTC diagnostic products and on-site solutions/ diagnostic service models, policies and regulations governing diagnostics and affiliated services pertaining to pharmacies and e-commerce channels, availability and uptake of over the counter diagnostic products for individual use, on-site sample collection and on-site sample testing at these channels, etc.
6. Prepare a directory of key pharmacy market players and e-commerce market players, including pharmacies/e-commerce and pharmacy/e-commerce affiliated organizations, and develop their organizational profiles and a comparative mapping of their business models, market share, capabilities, etc.
7. Synthesize and analyze data, share draft report and presentation capturing the landscape assessment, enablers and barriers to scale up of care via the pharmacy and e-commerce channel
8. Consolidate feedback and share final report and presentation outlining an assessment of key players, diagnostic products and/or services available, policy landscape, enablers and barriers to scale up, etc.

EXPECTED DELIVERABLES

The deliverables for each of the countries and channels should be prepared and submitted separately:

1. Inception report, including classification framework for each of the channels
2. Directory of pharmacy and e-commerce market players along with their organizational profiling (PPT/RTF) and comparative profiling (PPT/RTF & XLS) as detailed above
3. Any quantitative data collected or generated related to pharmacies, e-commerce, market share and consumer demand in XLS format
4. Synthesis of KOL interviews/focus group discussion outputs or any other qualitative information collected (PPT/RTF)
5. Brief market landscape, developed separately for each of the channels, summarizing key findings in a presentation and report
6. Brief policy review of relevant regulations, policies and governance structures as highlighted in the scope of work in a presentation and a report, developed separately for each of the channels
7. Final report and PowerPoint presentation detailing market findings, barriers and opportunities, developed separately for each of the channels with overlaps clearly highlighted

REPORTING REQUIREMENTS

The consultant/organization shall provide to FIND bi-monthly updates detailing the progress. The format for reporting shall be mutually agreed by both parties within ten (10) business days after signing this agreement. The consultant/organization shall maintain records and receipts for costs related to the

consultancy work and shall make them available for inspection by the designated representative, upon request.

LOCATION AND DURATION

The geographical scope of the landscape for all the three channels includes **India, Indonesia, Philippines and Nigeria**. The exercise is expected to last **up to 16 weeks**. Applicants/bidders may apply for the contract in one, some or all the focus countries.

PAYMENT SCHEDULE

- 10% upon signing
- 20% upon submission of inception report
- 25% upon submission of brief market landscape report, organizational directory and comparative profiling of key pharmacy and e-commerce players
- 45% upon submission of final report and presentation

APPLICATION GUIDELINES

- Interested applicants may apply for the contract in one or multiple countries
- Interested applicants need to submit a proposal covering each of the delivery channels in the country proposal. Proposals which do not cover all the delivery channels will be rejected.

Technical Proposal

- The technical proposal should include three sub-components
 - **Section 1: About the Organization and Experience**
 - A document outlining company overview and profile including the company's full-time staff strength for last three years; outline of company competency and available examples of previous work similar to this Scope of Work in the last 3 years.
 - For each assignment, the outline should indicate the duration of the assignment, the contract amount, and if it was done in a form of a joint venture or a sub-consultancy, the involvement should be made clear
 - In the case of a joint venture, information on similar assignments shall be provided for each partner
 - Assignments completed by the company's individual experts working privately or through other consulting firms cannot be claimed as the relevant experience of the company but can be claimed by the individual experts themselves in their CVs
 - The organization should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if requested by the Client
 - **Section 2: Description of Approach and Methodology, and Work Plan for performing the assignment**
 - Your technical response should explain your understanding of the objectives of the assignment as outlined in this document, the technical approach, and the methodology you would adopt for implementing the tasks
 - FIND welcomes new ideas and innovative approaches- it is recommended that applicants provide the list of key data sources that will be used to estimate the total market view.
 - Work plan should explain the plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and tentative delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing

understanding of the TOR and ability to translate them into a feasible working plan and work schedule showing the assigned tasks for each expert. A list of the final documents (including reports) to be delivered as final output(s) should be included here. The work plan should be consistent with the requirements laid out in the document.

- The technical response should clearly specify if various components of the response are applicable to each of the delivery channels or specific channels. Please note the technical response should cover each of the channels laid out in the objectives.
- In case the consultant/organization is submitting a proposal for multiple countries, the applicant has the choice to submit a consolidated multi-country technical proposal, however, any country specific differences in the approach and methodology should be clearly highlighted.
- **Section 3: Organization and Staffing of the Team**
 - Describe the staff that will deliver the assignment, the role each person will have on the project and provide a summary of duties and responsibilities.
 - If a staff member is staffed on more than one country, this should be clearly specified along with an explanation of the overlap or divergence in roles played in each of the country assignments
 - Include short CVs of key professionals proposed to be deployed for the research project, as per the format shared in the annexure
 - In case of the involvement of subcontractors, describe the attributes and expertise of each organization chosen to participate on this project as a subcontractor and to which specific primary outcome(s) their participation will contribute
 - Kindly note the lead consultant is expected to participate in all key meetings

Financial Proposal

- In case the consultant/organization is submitting a proposal for more than one country, a consolidated financial proposal can be submitted but country-wise budget-lines should be provided
- The financial proposal should include a summary of finances in USD with a detailed breakdown of staffing costs and reimbursable expenses, a deliverables-based payment schedule corresponding with the required level of effort.
- In the financial proposal please include any estimations for research or market research reports
- No price information should be contained in the technical proposal
- Any additional information may be included in the appendix

HOW TO APPLY

- Interested applicants are invited to submit an electronic proposal in English to **procurements_miu@finddx.org** no later than **11.59 pm CET on 17/01/2023**.
- Please mention “Proposal: Pharmacy and E-commerce Channel Market Landscaping” in the subject line
- The file shall be in the form of pdf files only
- Max. Files Size per transmission: 5MB
- Please be aware that bids or proposals emailed to FIND will be rejected if they are received after the deadline for bid submission. As an email may take some time to arrive after it is sent, especially if it contains a lot of information, we advise all bidders to send email submissions before the deadline.

AWARD CONDITIONS (EXCLUSION CRITERIA)

Applicants that are selected for final awards are required to:

- Be legally permitted to perform work in the country where the contract will be performed;
- Commit to and follow FIND Global Access Policy (mandatory for research, R&D, manufacture or supply of IVD etc), and FIND Code of Conduct and Ethics; and
- Accept the Terms and Conditions of KfW Declaration of Undertaking.

TIMELINES

Publication of RFP	7 December, 2022
Closing for submission of written queries	7 January 2023, 11.59 pm CET
Closing of RFP submissions	17 January 2023, 11.59 pm CET
Start of interviews for shortlisted candidates	25 January 2023
Close of interviews	1 February 2023
Communication on Award	On or before 13 February 2023

QUESTIONS AND COMMUNICATIONS PROTOCOL

Please email questions about the scope of work to: procurements_miu@finddx.org. Questions will be accepted until **07/01/2023**.

CONTRACTUAL TERMS AND CONDITIONS

FIND will use a consultancy contracting mechanism with standard Terms and Conditions.

EVALUATION AND AWARD PROCESS

Proposals will be assessed, and partners selected, through a systematic process. A two-stage procedure shall be utilized in evaluating proposals, with evaluation of the technical proposal being completed prior to any price proposal being compared. For evaluation and selection method, the Cumulative Analysis Method (weight combined score method) shall be used. The evaluation matrix is outlined below.

Only organizations that meet a minimum technical score of 50 out of 70 will be evaluated for their financial proposal and shortlisted and invited for an in-depth second pass evaluation consisting of a presentation and interview. Applicants will be notified of FIND's decision after the final partner selection.

EVALUATION CRITERIA

For evaluation and selection method, the Cumulative Analysis Method (weight combined score method) shall be used with the following allocation to the technical and financial proposal

- Technical evaluation – max 70 points
- Financial proposal – max 30 points

Technical evaluation

The technical proposal will be evaluated as follows:

Technical Evaluation (70 points)				
Area of review	Description	Scoring	Weight	Max Score
Organization capacity and experience	Assessment of the history of your company, your experience as it relates to the requirements within this RFP, evidence of past performance, quality and relevance of past work, references and related items	0: No response 1: Limited, poor 2: Fair, possibly acceptable 3: Good, soundly acceptable 4: Excellent, surpasses expectations	5	20
Understanding of the context and method of approach	Description of the assignment's understanding, overall methodology including analytical framework and data collection methodology to deliver within the required time frame. Outline of proposed list of key opinion leaders and ability to access important data/market intel sources.	0: No response 1: Limited, poor 2: Fair, possibly acceptable 3: Good, soundly acceptable 4: Excellent, surpasses expectations	10	40
Projected output	Illustrative projected outputs included in the proposal	0: No response 1: Limited, poor 2: Fair, possibly acceptable 3: Good, soundly acceptable 4: Excellent, surpasses expectations	2	8
Project work plan and timeline	Detailed and feasible workplan that demonstrates efficient execution and delivers expected scope in no more than 16 weeks	0: No response 1: Limited, poor 2: Fair, possibly acceptable 3: Good, soundly acceptable 4: Excellent, surpasses expectations	3	12
Proposed team strength and technical capacity	Demonstrated team experience in relation to this project and geography focus. Presence of key partnerships relevant for delivering outputs, particularly in any of the applicable geographies.	0: No response 1: Limited, poor 2: Fair, possibly acceptable 3: Good, soundly acceptable 4: Excellent, surpasses expectations	3	12
Key issues	Description of challenges, if not already covered above, that you	0: No response 1: Limited, poor 2: Fair, possibly acceptable	1	4

	anticipate in successfully completing this project, and how you will overcome them.	3: Good, soundly acceptable 4: Excellent, surpasses expectations		
Other competencies	Description of any other competencies that you may have related to the project that aren't covered in the above considerations.	0: No response 1: Limited, poor 2: Fair, possibly acceptable 3: Good, soundly acceptable 4: Excellent, surpasses expectations	1	4
Total				100

*Technical score = Technical score out of 100 * (70/100)*

Financial Proposal

The maximum number of points shall be allotted to the lowest financial proposal that is opened /evaluated and compared among those technical qualified candidates who have attained a minimum 50 points score out of 70 points from the technical proposal in the technical evaluation.

Other financial proposals will receive points in inverse proportion to the lowest price. The Contract shall be awarded to a company obtaining the highest combined technical and financial scores, subject to the satisfactory result of the verification interview.

All other financial proposals will receive points in inverse proportion to the lowest price, e.g.:

$$\text{Score for financial proposal } X = \frac{30 * \text{Price of lowest financial proposal}}{\text{Financial of proposal } X}$$

ANNEXURE

CURRICULUM VITAE (CV)

Name of expert	
Organization	
Position Title	
Total years of experience	

Education

Degree/Diploma	College/University	Dates attended

Employment record relevant to the assignment

Starting with present position, list in reverse order. Please provide dates, name of employing organization, titles of positions held, types of activities performed and location of the assignment. Past employment that is not relevant to the assignment does not need to be included.

Period	Your title/position & Employing Organization	Country	Summary of activities performed relevant to the assignment

Role in the assignment

Detailed Tasks Assigned on Consultant's Team of Experts:	Reference to Prior Work/Assignments that Best Illustrates Capability to Handle the Assigned Tasks
List all deliverables/tasks in which the Expert will be involved	

Contact information (email and phone):

Language Skills (indicate only languages in which you can work):

-

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience, and I am available, as and when necessary, to undertake the assignment in case of an award. I understand that any misstatement or misrepresentation described herein may lead to my disqualification or dismissal by the Client, and/or sanctions by FIND

Name of expert and signature

Date

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