

Request for Quote (RFQ)

Willingness to Pay and Market Sizing for Continuous Glucose Monitoring (CGM) in Kenya and South Africa

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About FIND

FIND, the global alliance for diagnostics, seeks to ensure equitable access to reliable diagnosis around the world. We connect countries and communities, funders, decision-makers, healthcare providers and developers to spur diagnostic innovation and make testing an integral part of sustainable, resilient health systems. We are working to save 1 million lives through accessible, quality diagnosis and save US\$1 billion in healthcare costs to patients and health systems. We are co-convenor of the Access to COVID-19 Tools (ACT) Accelerator diagnostics pillar and a WHO Collaborating Centre for Laboratory Strengthening and Diagnostic Technology Evaluation.

Background

Continuous glucose monitoring (CGM) devices have transformed the ability of people living with diabetes and their healthcare providers to manage this condition. However, current CGM technologies are largely unaffordable for people with diabetes in low- and middle-income countries (LMICs). In LMICs where CGM devices are registered for sale, one month's worth of sensor supplies starts at a cost of around US\$ 110 and, given that CGM devices are not generally provided through government insurance schemes, they are an out-of-pocket expense. This renders them largely unaffordable for many people living with diabetes who do not have private health insurance or the means to pay out-of-pocket. Therefore, in LMICs where CGM devices are registered for sale, their availability is mainly restricted to the private sector.

FIND aims to enable the availability of affordable, minimally invasive CGM technologies for people living with diabetes to monitor their glucose levels.

To this end, FIND would like to understand what the willingness to pay (WTP) would be for a) people living with diabetes, as an out-of-pocket expense; b) third-party funders, as an insured benefit; and c) government insurance schemes.

In addition to this WTP research, FIND is interested in understanding what the potential market size would be, in value and volume, for the out-of-pocket segment of the market, considering various price points.

This work will contribute to the strategy that FIND is developing to improve access to CGM technology, through partnering with manufacturers of this technology.

Objectives

The objectives of this work are to

1. Understand WTP for CGM devices when purchased a) out-of-pocket by people living with diabetes, b) by third-party insurance providers and c) by governments
2. Scope the market size for buyers paying out-of-pocket, at various price points

Scope of the Work

The condition that is in scope for this work is **diabetes**. The technology that is in scope is **continuous glucose monitoring** technologies that are applied to the body for a period of 7 to 14 days; these technologies use a thin needle inserted into the skin to measure interstitial glucose concentration every few minutes. Results are obtained by transmitting the glucose values to a hand-held reader. Generally, the components of a CGM device comprise:

- A glucose sensor (usually replaced every 7 to 14 days, depending on the product)
- A transmitter (where applicable)
- A reader (where applicable)

The countries focused on for this work will be **Kenya** and **South Africa**.

1. Willingness to pay

A WTP evaluation (the preference is for the [Van Westendorp methodology](#)) will be conducted in each country. This will provide a price range for CGM devices by payer group and use case, considering the monthly costs as well as the cost of one-off purchases of components. The report must also include any additional requirements, such as adherence rates, comorbidities, or patient segments, that third-party or government payers would consider in addition to the price.

2. Market landscape and sizing

This will comprise:

- A summary of each country's healthcare system for diabetes care
- Stakeholder mapping, identifying the roles played by key stakeholders (e.g. people living with diabetes, caregivers, healthcare professionals, funders etc.) in the CGM device market segment
- Market size estimates, including details on segment profiles and definitions
- An estimate of the price elasticity of demand
- A quantification of the total addressable market and projected growth for CGM devices
- Development of a scenario-based market-sizing model broken down by use-cases

Deliverables:

Deliverable #1: A range of acceptable prices, including the lower and upper thresholds and optimal price point per payer and use-case, presented in written and graphical format.

Deliverable #2: A summary slide deck of WTP in Microsoft PowerPoint. All quantitative results must be graphically represented together with a narrative.

Deliverable #3: A market-sizing model, with inputs (assumptions) and outputs (visualizations) clearly shown, including the market-sizing methodology, in Microsoft Excel format.

Deliverable #4: A list and contact details for key stakeholders who could potentially be interviewed.

Deliverable #5: Standard interview guides for each type of stakeholder that will be engaged with, to be validated by FIND.

Deliverable #6: An intermediate market landscape report in Microsoft Word or PowerPoint format, detailing all the findings of the analysis. A template/outline for the report will be agreed with FIND at the beginning of the project.

Deliverable #7: A finalized market landscape report in Microsoft Word or PowerPoint format, detailing all the findings of the analysis. A template/outline for the report will be agreed with FIND at the beginning of the project.

Requirements for Proposal Preparation

Candidates interested in responding to this RFQ should submit a proposal, in Microsoft Word or PowerPoint format, that includes the following information:

- Organizational profile, including short biographies of key staff involved in the work
- Services provided (consulting, market research, off-the-shelf data and reports, etc.)
- Proposed scope of work and work plan
- Proposed methodology and approach for the WTP and market-sizing research
- Experience, including a list of relevant projects that your organization has worked on
- Networks and partnerships in LMICs
- Timelines and budget (including a full breakdown)
- Client references
- Contact details (in case FIND needs to follow-up regarding the proposal)

Evaluation and Award Process

The evaluation process is designed to be objective, independent and transparent, to ensure that the most suitable proposals are identified. All proposals will be evaluated by an internal review panel comprising the Noncommunicable Disease Programme and Access team members from within FIND. All proposals will be evaluated against the following criteria:

- Organizational strength and team experience in conducting WTP and market assessments in LMICs and in the diagnostics field
- Verifiable past performance with similar projects
- Comprehensiveness of the proposed methodology and strategy
- Ability to deliver the requirements on time
- Networks in the countries of scope, i.e. access to networks of relevant stakeholders in the LMICs in scope
- Budget

Budget

Up to US\$ 50 000, including professional and travel expenses.

Timelines and Submission

Please submit your proposal by 9th September 2022

The successful applicant will be notified by the latest of 30th September if their proposal has been accepted.

The work should be completed by the end of December 2022

Please send submissions and any questions to NCDs@finddx.org