



REQUEST FOR PROPOSALS

MARKET RESEARCH

Issued by

The Global Alliance for Improved Nutrition (GAIN)

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I. PROJECT BACKGROUND

1. About GAIN

The Global Alliance for Improved Nutrition (GAIN) is a Swiss-based foundation launched at the UN in 2002 to tackle the human suffering caused by malnutrition. Working with both governments and businesses, we aim to transform food systems so that they deliver more nutritious food for all people.

GAIN's work to improve the consumption of safe and nutritious food is based on three interlinked strategic objectives:

1. to improve the demand for safe, nutritious foods,
2. to increase the availability and affordability of nutritious foods and enhance the nutritional value of foods, and
3. to strengthen the enabling environment to improve the consumption of safe, nutritious foods

We build alliances between governments, local and global businesses, and civil society to deliver sustainable improvements at scale. We are part of a global network of partners working together to create sustainable solutions to malnutrition. Through alliances, we provide technical, financial and policy support to key participants in the food system. We use specific learning, evidence of impact, and results of projects and programmes to shape and influence the actions of others.

Headquartered in Geneva, Switzerland, GAIN has representative offices in Denmark, The Netherlands, the United Kingdom, and the United States. In addition, we have country offices in Bangladesh, Ethiopia, India, Indonesia, Kenya, Mozambique, Nigeria, Pakistan, and Tanzania. Programmes and projects are carried out in a variety of other countries, particularly in Africa and Asia.

2. Background

Over two billion people, mainly living in Asia and Africa, are affected by malnutrition. One of the most critical forms of malnutrition is micronutrient deficiency, or a lack of the essential vitamins and minerals required for healthy growth, development and function.

Micronutrient deficiency has multiple underlying causes but is most directly affected by narrow diets of energy-dense staple foods that lack micronutrients (refined cereal grains, rice and cassava). One of the most rapid, cost-effective and directly impactful strategies to reach hundreds of millions to combat micronutrient malnutrition is to fortify staple grains and condiments with vitamins and minerals – this process is done through the addition of *Vitamin and Mineral Premix or straight fortificants (either a Vitamin or Mineral)* to a food, e.g. wheat flour, maize flour, edible oil or condiments such as sugar, soy sauce and salt. Food fortification has been ranked among the top three international development priorities by the Copenhagen Consensus³. The intervention needs to be scaled up to ensure it plays its part to help achieve the Sustainable Development Goals (SDGs), including Goal 2 which aims to end hunger and ensure access by all people, in particular the poor and those in vulnerable situations, to safe, nutritious and sufficient food and end all forms of malnutrition by 2030. Staple and condiment fortification increases intakes of critical micronutrients, including iron,

folic acid, vitamin A and iodine in populations without requiring them to change their diet or household spending and has been used effectively since the early 20th century in the U.S. and Europe. GAIN has, over the past 15 years, mobilised partnerships to catalyse food fortification programmes in over 30 countries.

Global Alliance for Improved Nutrition (GAIN)

The Global Alliance for Improved Nutrition (GAIN) was launched at the UN in 2002 to tackle the human suffering caused by malnutrition. Working with partners, GAIN aims to make healthier food choices more affordable, more available, and more desirable. We aim to support and advise governments, businesses, and development partners as they build and mobilise food and nutrition plans to advance nutrition outcomes. GAIN’s purpose is to improve nutrition outcomes by improving the consumption of nutritious and safe food for all people, especially the most vulnerable.

GAIN is a global, Swiss-based foundation that mobilises public-private partnerships and provides financial and technical support to deliver nutritious foods to those people most at risk of malnutrition. GAIN’s programs in Africa and Asia enable better diets via nutritional products, such as fortified staple foods, including cooking oil and flour, and condiments like salt and soy sauce.

Country fortification programs and performance data

A key focus is improving the management and performance of food fortification programs by making key performance indicators available (see table 1 below) that will facilitate decision making and trigger program improvements.

To inform the food fortification program management in Nigeria, India and Tanzania, GAIN is focused on strengthening monitoring at different points and improving the reporting of key indicators to understand the food market and performance of the fortification program:

Table 1: Key indicators

Objective	Key indicators
<p>1. Assess the availability of brands for a mandated food in the market</p>	<ul style="list-style-type: none"> • Total number of brands of a food • Proportion of food brands that are locally produced or imported (other characteristics) • Proportion of bulk/loose/unbranded food
<p>2. Assess the market share of available brands and producers/suppliers of a food in the market including bulk/loose/unbranded food</p>	<ul style="list-style-type: none"> • Total volume / market value, leading brands, local and imported, as well as bulk/loose/unbranded food • Proportion of total market share occupied by a food brand and/or producer/supplier and including bulk/loose/unbranded food
<p>3. Assess the nutrient content and fortification quality of brands available in the market</p>	<ul style="list-style-type: none"> • Nutrient content of a food brand • Proportion of food brands that are fortified (to any extent) • Proportion of food brands that are fortified to the extent that qualifies as compliant with standard • Proportion of food brands that are appropriately labelled and/or which meet stated fortificant levels

<p>4. Assess the market share of food compliant with fortification standard available to consumers in the market</p>	<ul style="list-style-type: none"> • Food supply volume • Proportion of food volume that are fortified (to any extent) • Proportion of food volume fortified to the extent that qualifies as compliant with standard
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The indicators under the first two objectives (number and volumes of brands and producers/suppliers including bulk/loose/unbranded food) provide the underlying data that is related to fortification quality under the third and fourth objective.

While this assignment is only focused on data that inform the indicators under objectives one and two, the disaggregation of this data into categories should enable linkages with data on fortification quality that is collected at the production site, the market and/or the household level.

FORTIFICATION PROGRAMS AND FORTIFICATION PERFORMANCE DATA

In early 2021 GAIN will conduct market assessments in collaboration with local stakeholders in Nigeria, India (Madhya Pradesh and Rajasthan) and Tanzania to assess availability and fortification quality of food brands/products. This presents a relevant data source for the first two objectives, generates fortification quality indicators under objective three and combined with the market share data informs indicators under objective four.

Nigeria:

National fortification of salt with iodine began in 1993, and fortification of wheat flour, semolina flour, and maize flour with multiple micronutrients, and sugar and edible oil with vitamin A has been mandated by law since 2002. A 2013 nationwide survey of vitamin A in oils and sugar, and iron in flours sampled from factories and markets found that only 15% to 20% of the samples of oil, 12% to 17% of sugar, and 12% to 33% of flour were fortified at or above the minimum national standard for vitamin A, and only 1% to 21% of flour samples were fortified at or above the minimum national standard for added iron⁵. In addition, the FACT 2015 survey conducted in Kano and Lagos states found inconsistent and generally low compliance with fortification standards in household food samples. In Kano, 28% of salt, 1% of sugar, 47% of oil, 27% of wheat flour, 0% of maize flour, and 26% of semolina flour samples were fortified at or above the minimum national standard; and in Lagos, 12% of salt, 2% of sugar, 31% of oil, 73% of wheat flour, 0% of maize flour, and 24% of semolina flour samples were fortified at or above the minimum national standard. The more recent 2017 FACT survey conducted in Ebonyi and Sokoto states found similar inconsistent and low compliance in market samples collected by brand across both states. Of all available brands identified, four brands (67%) of salt, eight brands (89%) of sugar, 18 brands of oil (46%), six brands (86%) of wheat flour, and four brands (80%) of semolina flour were fortified to some extent, while none of the maize flour brands were confirmed to be fortified at all. All of the four brands (67%) of salt were fortified in compliance with the mandated minimum national standard range for Nigeria, while only one brand (11%) of sugar, eight brands (20%) of oil, three brands (43%) of wheat flour, and none of the brands of semolina flour were fortified at or above the minimum national standard.

India:

Legislation relating to food fortification has been in place in India for more than 60 years. Most recently, the government recommended fortification in its 10th (2002), 11th (2007), and 12th (2012) 5-year plans for government-led nutrition programs. Aside from iodization of salt and fortification of “Vanispati Ghee” (a low-cost ghee substitute) with vitamin A, fortification is devolved to individual states within the country’s federal system. In 2012-13 GAIN conducted a FACT survey in Rajasthan. Atta wheat flour was widely consumed across the state (83%); however, only about 7% of the atta wheat flour was classified as fortifiable, but the majority of that -- about 6% -- was fortified (mostly inadequately). For oil, almost 90% of edible oil consumed by households in the survey was classified as fortifiable, but only about 24% was fortified. For both wheat flour and oil are not mandated to be fortified in the state. For salt, coverage was high nationally, with almost 85% of households using fortified salt and 66% of households using adequately fortified salt.

The market quality assessment conducted in 2019 weighted by the product market volume found over 90% of the branded product market volume fortified, except for maize flour. 95% of the salt, 51% of the sugar and 42% of the margarine was fortified according to the national fortification standard.

Tanzania:

In Tanzania, national fortification of salt with iodine began in the 1990’s, and fortification of wheat and maize flour with multiple micronutrients and oil with vitamin A has been mandated by law since 2011. A FACT survey conducted in 2015 revealed that the proportion of households consuming a fortified food was 54% for oil, 33% for wheat flour, 3% for maize flour, and 70% for salt; with similarities observed in rural and urban areas. The fortification quality compared to Tanzania national standards varied greatly by food. Among oil samples, 16% nationally, 18% in rural areas and 16% in urban areas were adequately fortified. Among wheat flour samples, 19% nationally, 20% in rural areas and 17% in urban areas were adequately fortified. Among maize flour samples, 3% nationally, 5% in rural areas and 2% in urban areas were adequately fortified. Among salt samples, 63% nationally, 53% in rural areas and 80% in urban areas were adequately fortified. Classification of salt samples using the World Health Organization international standard for household samples found that 43% nationally, 34% in rural areas and 58% in urban areas were adequately fortified.

The market quality assessment conducted in 2019 weighted by the product market volume found over 90% of the branded product market volume fortified, except for maize flour of which only 50% were. 90% of the salt, 85% of the wheat flour and 38% of the oil was fortified according to the national fortification standard.

II. OBJECTIVES THE STUDY

A good understanding of the food market sizes, market shares by producer/supplier and their brands as well as bulk/loose or unbranded is required for better decision making and fortification management improvement in Nigeria, India and Tanzania.

The objectives of this market research are to identify and expand available data sources and develop a sustainable approach to enable regular updates of the market of foods that can or are mandated to be fortified with the following disaggregation:

- list the *suppliers / producers* of all *products/brands* available in the country;
 - define products/brands with characteristics such as: brand name, food type, producers or suppliers, origin, price, packaging, logos to enable identification of the product/brand in the market. These categories will enable linkages to available product/brand availability and fortification quality data as well as the household / consumer selection criteria and preferences.

- identify both branded/non branded/loose products and contribution of the two to suppliers' production
- approximate market volumes and values, shares/proportions, food volumes/value by supplier / producer and their products/brands available in the market
- approximate volumes/values and proportions in the country and by state or province determine the volumes/values and proportions of *packaged* brands and food sold as *bulk/loose/unbranded* by supplier/producer that are present in the country, state or province
- approximate volumes/values and proportions distributed through different *supply channels* (import, local production, and sales through different retail outlet types)

III. SCOPE OF WORK

MARKET RESEARCH

The agency shall layout the methodology for market volume estimates and identify various data sources (e.g. primary, secondary) that can provide an in-depth overview of the food market including in-country production, imports and exports and a dataset with breakdown by food producers/suppliers and brand products as well as bulk/loose/unbranded product and their respective market volumes/values.

The agency should layout how such data can be updated and regularly reported in a sustainable way to inform key food fortification decision-makers on the following foods by country:

India:

1. Salt
2. Edible oils
3. Wheat flour
4. Milk
5. Rice

Nigeria:

1. Salt
2. Edible oils
3. Margarine
4. Wheat flour
5. Semolina flour
6. Sugar
7. Maize Flour
8. Bouillon cubes

Tanzania:

1. Salt
2. Edible oils
3. Wheat flour
4. Maize Flour

METHODOLOGY

The agency will propose the required data and the approach to update the food producers/suppliers and brands/products lists and their respective market volumes and values, which will then be used to update the key fortification indicators.

This methodology shall enable regular updates of the dataset with any new data from already identified sources or new data sources, thereby generating updated reports of key food fortification indicators for each food by country. If up-to-date data from the desired sources are not regularly available, the methodology should propose estimates based on other more indirect more frequently available data.

We are looking for innovative, cost-effective approaches and data sources, which are easily repeatable and affordable by governments to ensure sustainability.

The methodology can include an outline of the database structure and provide syntax to update producers/suppliers and brands/products lists including bulk/loose/unbranded food as well as estimate/model market proportions when primary data is not available at that level.

IV. DELIVERABLES

For the following food vehicle by country:

India:

- a. Salt
- b. Edible oils
- c. Wheat flour
- d. Milk
- e. Rice

Nigeria:

- a. Salt
- b. Edible oils
- c. Margarine
- d. Wheat flour
- e. Semolina flour
- f. Sugar
- g. Maize flour
- h. Bouillon cubes

Tanzania:

- a. Salt
- b. Edible oils
- c. Wheat flour
- d. Maize flour

- An Executive Summary and responding PowerPoint presentation summarizing the data, data source, estimation models, indicators updates
- A report comprising the following:
- Overview and description of the entire market as well as the relevant market categories and suppliers/producers and brand definitions by food
 - Food market
 - Consumption
 - Production
 - Imports
 - Exports
 - Market categories e.g.:
 - Different food type categories

- Regional supply/production differences
 - Supply from different categories of producers/suppliers
 - Supply channels
 - Etc.
 - Producer/supplier categories:
 - Supplier/producer type (trader/importer, distributor, processor, producer)
 - Local or imported
 - Production from small to large scale producers
 - Brand/products
 - Open/ bulk/loose or unbranded and packaged
 - Food type category (e.g. for oil (palm oil, sunflower oil, soyabean oil))
 - Labelling
 - Price
 - Supplier/producer type (trader/importer, distributor, processor, producer)
- Description of the data sources and frequency of data updates
 - Data sets with the detailed tables:
 - Exhaustive list of at least the main (representing >80% of the market share) suppliers (importers, processors/producers) and of their respective brands/products or their food supply provided in bulk/loose or unbranded
 - List of brands and bulk/loose/ unbranded food distributed/sold or available in the market by province/region/state, retail outlet type and volume and value and/or proportion of total market volume/value
 - Other data tables or database queries with break-down by food and food type, supply channel (geographic, retail outlet type), produced and volume and/or proportion of total market volume
 - Description of estimation model and syntax to estimate data required to inform the key fortification indicators that is not regularly available from primary sources, i.e. estimate the food brand volume supplied to the regions based on e.g. total supply volume in the country and data on availability of the food brand in the regions.
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 - Description of the approach to update the market data sets with any new data

TIMELINE

2019	Nov 2020	Dec	Jan 2021	Feb	Mar	Apr
RFP Launch						
Confirmation of Intent to Respond						
Proposal Deadline						
Award of Contract						
Contracting						
First report and data sources						
Report and data set						

The timeline can be modified if multiple countries are covered.

DEADLINES

RFP Launch:	30.11.2020
Proposal Deadline:	15.12.2020
Award of Contract:	05.01.2021 (estimated date)
Signing of Contract:	10.01.2021 (estimated date)
Contract completion:	31.03.2021 (estimated date)

AGENCY SELECTION CRITERIA

The Market Research Agency will be expected to have extensive experience in market research including market size and share determination.

Key criteria for the agency to be hired include:

- Proven expertise in market research including market size and share determination.
- In-depth knowledge of the market in the country of interest
- Registered business entity in the country is an advantage.
- Strong analytical skills and expertise in market estimations and models.
- Previous experience working in all or some of the market categories, including pre-existing data would be an added advantage.
- Excellent writing skills in the English language.

V. INSTRUCTIONS FOR RESPONDING

This section addresses the process for responding to this solicitation. Applicants are encouraged to review this prior to completing their responses.

1. Contact

A selection team of the organisation and will review the proposals. They will be available via email to respond to clarifications on this solicitation. Please direct all inquiries and other communications to the contact below. Responses will not be confidential except in cases where proprietary information is involved.

Svenja Jungjohann, Senior Project Manager, sjungjohann@gainhealth.org

2. Budget

Applicants are required to provide GAIN with a detailed fee percentage proposal. The final budget amount will have to be approved by the organisation prior to starting the project.

3. Format for proposal

The proposal needs to be formatted as follows:

1. Executive summary
2. Technical proposal
 - a. Development process: explain the process you envisage to achieve the deliverable, including major milestones and evaluation
 - b. Address the deliverable and quality criteria
 - c. Address any important technical information
3. Schedule
 - a. Provide a detailed workplan with deliverables, on a week by week basis
 - b. Include a schedule for preparation and review by GAIN
4. Budget break down
 - a. Include a break-down of costs for the work components and deliverables
 - b. Include travel costs if required
5. Attachments
 - a. Relevant qualifications and experiences relevant to this RFP
 - i. Agency's capacity statement &/or proof of experience on the assignment
 - ii. Team's composition and key CVs.

4. Submission

An electronic copy containing the documents preferably in MS Word along with all the required information including the fee proposal should reach GAIN by email:

Email: **Svenja Jungjohann, Senior Project Manager, sjungjohann@gainhealth.org**

5. Deadline

Completed proposals should be submitted to GAIN by email **before 12:00 p.m. Central European Time on 15. Dec. 2020.**

6. Unacceptable

The following proposals will automatically not be considered or accepted:

- Proposals that are received after the RFP deadline at the specified receiving office.
- Incomplete proposals.

7. Revisions

Proposals may be revised by electronic mail provided such revision(s) are received before the deadline.

8. Acceptance

GAIN will not necessarily accept the lowest cost or any of the Proposals submitted. Accordingly, eligibility requirements, evaluation criteria and mandatory requirements shall govern.

9. Completion

- Proposals must be submitted must be signed by a principal or authorising signatory of the lead firm or organisation.
- In case of errors in calculating overall costs, the unit costs will govern.
- It is the applicant's responsibility to understand the requirements and instructions specified by GAIN. In the event that clarification is necessary, applicants are advised to contact the responsible person at GAIN under section II. point 1., prior to making their submission.
- While GAIN has used considerable efforts to ensure an accurate representation in this Request for Proposal (RFP), the information contained in this RFP is supplied solely as a guideline. The information is not warranted to be accurate by GAIN. Nothing in this RFP is intended to relieve applicants from forming their own opinions and conclusions with respect to the matters addressed in this RFP.
- By responding to this RFP, the applicant confirms its understanding that failing to comply with any of the RFP conditions may result in the disqualification of their submission.

10. Rights of rejection

GAIN reserves the right to reject any or all submissions or to cancel or withdraw this RFP for any reason and at its sole discretion without incurring any cost or liability for costs or damages incurred by any applicant, including, without limitation, any expenses incurred in the preparation of the submission. The applicant acknowledges

and agrees that GAIN will not indemnify the applicant for any costs, expenses, payments or damages directly or indirectly linked to the preparation of the submission.

11. References

GAIN reserves the right, before awarding the Proposal, to require the applicant to submit such evidence of qualifications as it may deem necessary, and will consider evidence concerning the financial, technical and other qualifications and abilities of the applicant.

12. Release of information

After awarding the Proposal and upon written request to GAIN, only the following information will be released:

- Name of the successful applicant.

I. TERMS AND CONDITIONS OF THIS SOLICITATION

1. Notice of non-binding solicitation

GAIN reserves the right to reject any and all bids received in response to this solicitation, and is in no way bound to accept any proposal. GAIN additionally reserves the right to negotiate the substance of the successful applicants' proposals, as well as the option of accepting partial components of a proposal if deemed appropriate.

2. Confidentiality

All information provided as part of this solicitation is considered confidential. In the event that any information is inappropriately released, GAIN will seek appropriate remedies as allowed. Proposals, discussions, and all information received in response to this solicitation will be held as strictly confidential.

3. Right to final negotiations on the proposal

GAIN reserves the right to negotiate on the final costs, and the final scope of work of the proposal. GAIN reserves the right to limit or include third parties at GAIN's sole and full discretion in such negotiations.

4. Evaluation criteria

Proposals will be reviewed by the Selection Team. The following indicate a list of the significant criteria against which proposals will be assessed. This list is not exhaustive or 100% inclusive, and is provided to enhance the applicants' ability to respond with substance.

Applicants are required to submit the following information, conforming to the guidelines given in this section:

- Understanding of the scope of work:
 - Proposal shall demonstrate a clear understanding of the project objective and deliverables as outlined in Section I.
- Demonstrate a clear understanding of the technical requirements of this RFP:
 - Providing detailed technical documentation of the proposed strategy.
 - Evidence of experience delivering solutions using the proposed information technology platform.
- The creative and methodological approaches required to implement each of the parts of the scope of work.
- Comprehensiveness of work plan and reasonableness of proposed time frame:
 - Proposal shall include a feasible work plan to ensure successful completion of deliverables.
 - The work plan details how activities will be coordinated.
- Detailed budget and cost-effectiveness of proposed approach:
 - Evidence of cost-effective approaches to undertaking the scope of work within the proposed budget.
 - Proposal shall identify possible challenges and include creative approaches to addressing them.
- Management and personnel plan:
 - The team members working on this project shall have the relevant qualifications and overall experience required to successfully implement the project.
 - Roles and responsibilities of each team member shall be clearly defined. GAIN shall have one main contact person clearly identified in the proposal.
- A duly completed offer of services.

GAIN reserves the right to contact the individuals and contractor(s) in order to verify the information provided as part of the Proposal.

5. Review process

The review process will involve a Review Panel with participants selected by GAIN.

6. Limitations with regard to third parties

GAIN does not represent, warrant, or act as agent for any third party as a result of this solicitation. This solicitation does not authorise any third party to bind or commit GAIN in any way without GAIN's express written consent.

7. Communication

All communication regarding this solicitation shall be directed to appropriate parties at GAIN. Contacting third parties involved in the RFP, the review panel, or any other party may be considered a conflict of interest, and could result in disqualification of the proposal.

8. Final acceptance

Award of a Proposal does not imply acceptance of its terms and conditions. GAIN reserves the right to negotiate on the final terms and conditions including the costs and the scope of work when negotiating the final contract to be agreed between GAIN and the applicant.

9. Validity period

The offer of services will remain valid for a period of 60 days after the Proposal closing date. In the event of award, the successful applicant will be expected to enter into a contract subject to GAIN's terms and conditions.

10. Intellectual property

Subject to the terms of the contract to be concluded between GAIN and the applicant, the ownership of the intellectual property related to the scope of work of the contract, including technical information, know-how, processes, copyrights, models, drawings, source code and specifications developed by the applicant in performance of the contract shall vest entirely with GAIN.

11. Scope of change

Once the contract is signed, no increase in the liability of GAIN or in the fees to be paid by GAIN for the services resulting from any change, modification or interpretation of the documents will be authorised or paid to the applicant unless such change, modification or interpretation has received the express prior written approval of GAIN.

IV. OFFER OF SERVICES

1. Offer submitted by:

(Print or type business, corporate name and address)

2. I (We) the undersigned hereby offer to GAIN, to furnish all necessary expertise, supervision, materials, and other things necessary to complete to the entire satisfaction of the Executive Director or authorised representative, the work as described in the Request for Proposal according to the terms and conditions of GAIN for the following prices:

- 2.1 [to be completed]
- 2.2 [to be completed]
- 2.3 [to be completed]
- 2.4 [to be completed]

3. I (We) agree that the Offer of Services will remain valid for a period of sixty days (60) calendar days after the date of its receipt by GAIN.

4. I (We) herewith submit the following:

- (a) A Proposal to undertake the work, in accordance with GAIN’s requirements specified.
- (b) A duly completed offer of services, subject to the terms herein.

OFFERS WHICH DO NOT CONTAIN THE ABOVE-MENTIONED DOCUMENTATION OR DEVIATE FROM THE PRESCRIBED COSTING FORMAT MAY BE CONSIDERED INCOMPLETE AND NON-RESPONSIVE.

Date this day of [add month and year] in [add location]

_____ [add title]

Signature (applicant)

_____ [add title]

Signature (applicant)