

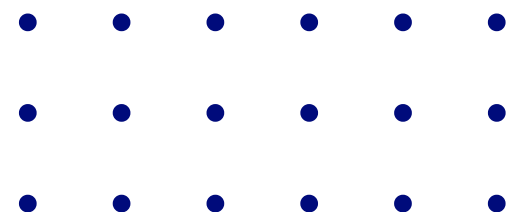
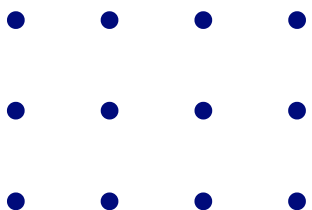
Tender & Contracting

Market Snapshots for the Pharma Industry

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An overview of a country's Tender Market at a glance

A quick yet effective way to understand how the **Pharma Tendering Market** behaves across countries.





Public tenders are mostly managed by the Ministry of Health (SPMS)

Hospitals are then allowed to **negotiate for additional discounts**, after the first round of tenders.

This results in a **two-stage procurement procedure**, with both stages focusing on price, which drives the price-level downwards.

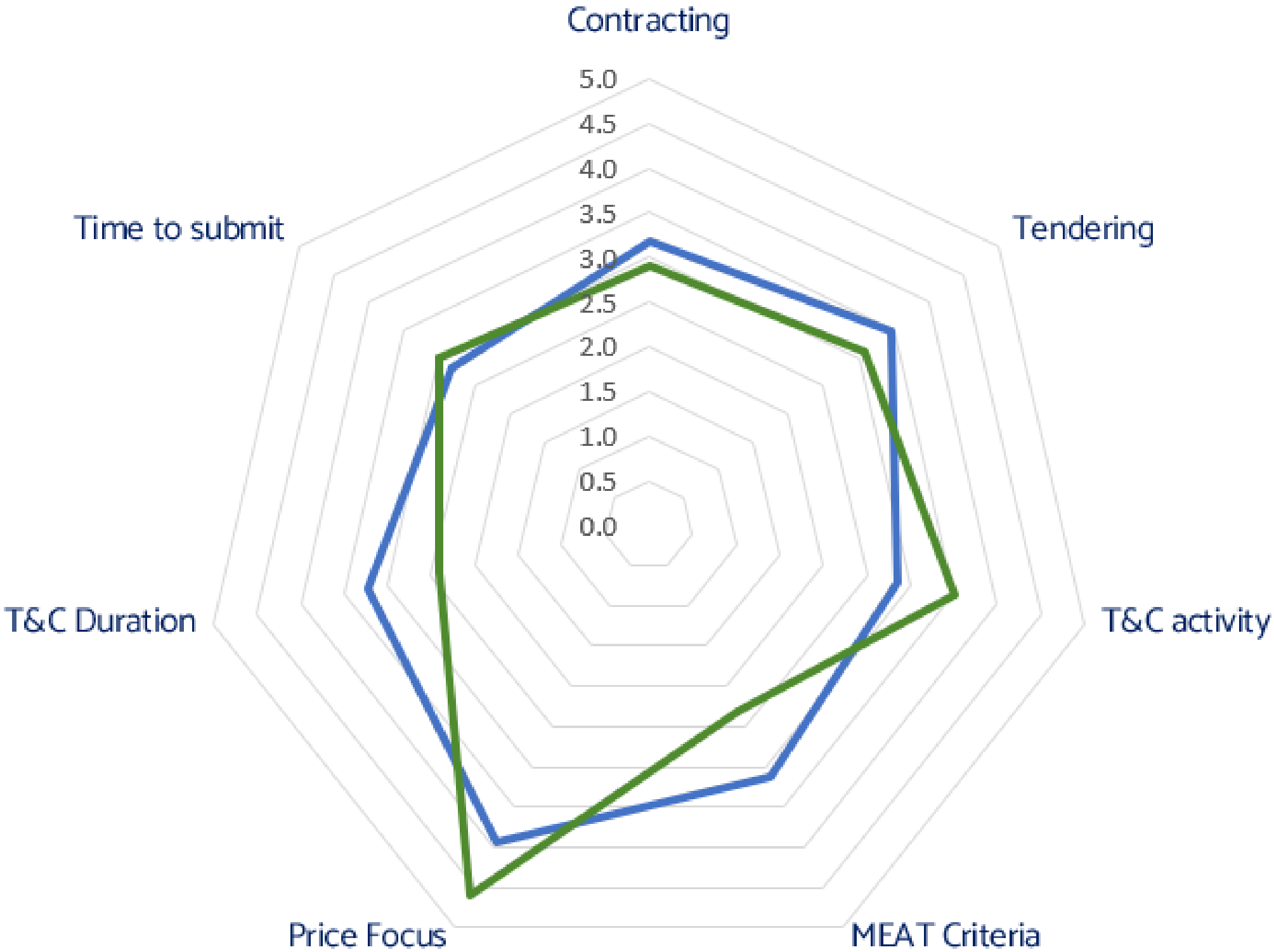
Portugal has a very low level of fully-owned pharmacy chains and therefore practically **no T&C activity in Retail.**





PORTUGAL T&C MARKET

— Average Europe — Portugal





Sources & Graph Explanation

The 'spider-net' indicates the relative importance or length (in the case of 'tender duration' and 'time to submit') of the country in-scope, versus a European average.

The spider-net is based partly on publicly available data, partly on market expert interviews and partly on growpal and CubeRM tender market know-how. It is an indication and estimate without a claim of full completeness and accuracy and it can vary - even within a country - based on tender authority, region or product portfolio.

Spider-net dimensions: 'Contracting' indicates the relative level of importance for contracting & negotiations / 'Tendering' indicates the relative level of tendering importance / 'Tender activity' indicates the number of annual tenders / 'MEAT criteria' indicates the relative importance of non-price award criteria / 'Price focus' indicates the relative importance of price / 'tender duration' indicates the average length of the tender duration / 'time to submit' indicates how much time on average a pharma-company has time to submit a tender.

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