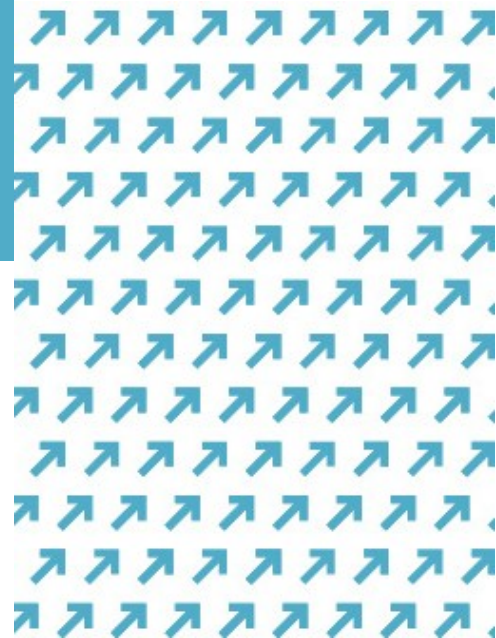


Driving affordability & availability of AT: Developing product narratives to guide sector investments



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An AT2030 Case Study www.AT2030.org

About AT2030

The AT2030 programme tests ‘what works’ to improve access to Assistive Technology (AT) and will invest £20m over five years to support solutions with a focus on innovative products, new service models, and global capacity support. The programme will reach nine million directly and six million more people indirectly to enable a lifetime of potential through life-changing AT. The programme is funded by UK aid and led by the Global Disability Innovation Hub (GDI Hub).

Under Cluster 3: Country Implementation of the AT2030 programme, Clinton Health Access Initiative (CHAI) is working with sector experts and partnering with country governments to identify opportunities to drive availability and affordability of AT. The below presents a case study of one such piece of work.

Context

AT provision has traditionally been fragmented and under resourced

Historically, AT has been an under-resourced and fragmented sector. Only a few bilateral donors, such as USAID, have been active in the space and these funders have a specific focus on wheelchairs, prosthetics, and vision. An initial analysis of the sector showed that faith-based organizations, corporate social responsibility programs of AT suppliers, and family foundations have attempted to fill the gap, but are typically also focused only on one area.¹ They often provide products through donations rather than strengthening public systems to deliver products and the related services necessary such as repairs and training on use.

New large initiatives launched to improve access to AT

The global AT community needs to leverage the capabilities and resources of the public, private and non-profit sectors. Two initiatives were launched in 2018 at the Global Disability Summit: 1) the **AT2030 programme**, a five year, GBP £20 million investment by UK aid, led by GDI Hub to test ‘what works’ to improve access to AT; and 2) **ATscale, the Global Partnership for Assistive Technology**, a cross-sector partnership to catalyse change to reach 500 million more people with the AT that they need by 2030. To achieve this goal, ATscale aims to mobilize global stakeholders to develop an enabling ecosystem for access to AT and to shape the markets, in line with a unified strategy.

¹ Holloway Catherine et al. (2018). Scoping research report on assistive technology on the road for universal assistive technology coverage. DOI: 10.13140/RG.2.2.13099.49443.; Boston Consulting Group. (2018). AT Market Shaping: Wheelchairs and Hearing Aids [Internal for USAID]; Clinton Health Access Initiative. Assistive Technologies (AT): Assessing The Potential for Market Shaping: (2018) [Internal for DFID]



The Challenge

Market shaping has been proposed to increase access to AT, but no comprehensive sector strategy exists to tackle market shortcomings

Market shortcomings contribute to low access to AT in low-and middle-income countries. Market shaping aims to improve a market's specific outcomes, such as access to high quality, affordable AT, by targeting the root causes of these shortcomings. As demonstrated in global health areas such as HIV/AIDS and vaccines,² this requires a clear understanding of the market, active partnership and coordination from multiple stakeholders.

Current efforts address several components of increasing access, such as training for professionals or developing service points, but activities are fragmented. A unified strategy to sustainably increase access could align stakeholders working in this area, including the public sector, private sector, and non-profit organizations, and bring new partners to this important work.

Approach

Market and sector analyses were conducted for selected assistive products

Under the AT2030 programme funded by UK aid to identify and test 'what works' and in support of ATscale's strategy, CHAI conducted market and sector analyses for five assistive products and related services—wheelchairs, hearing aids, eyeglasses, prostheses and assistive digital devices and software. Various methods were used to do this assessment such as desk research, market sizing, market segmentation, supplier mapping, pricing analysis and key informant interviews. Between 30-50 interviews were conducted for each product area with suppliers, users, service providers, academic experts, and government representatives.

² UNITAID and World Health Organization. (2013). *UNITAID 2013 Annual Report: transforming Markets Saving Lives*, http://unitaid.org/assets/UNITAID_Annual_Report_2013.pdf.; Suzman M. (2016). *Using Financial Guarantees to Provide Women Access to the Modern Contraceptive Products They Want to Plan Their Families*. Bill & Melinda Gates Foundation & World Economic Forum: May 2016.

Findings are documented in ‘product narratives’ along with recommendations to inform a unified strategy and identify immediate opportunities for investment

AT2030 and ATscale jointly published the analyses, called *product narratives*, which can be found on their websites.³ In line with the USAID Market Shaping Framework,⁴ the product narratives identify market shortcomings and underlying root causes for each product area assessed. Guided by expert consultation, long-term strategic objectives were identified to address these root causes and increase access for AT in low- and middle-income countries. Under each strategic objective, a series of immediate interventions are proposed. These interventions are not meant to only be taken on by one actor in the sector, but rather will require active partnership and coordination from multiple stakeholders.

Findings from the analyses

For all product areas assessed, the markets in low- and middle-income countries are nascent with a need to focus on demand creation

A limited understanding of the unmet need as well as the role and benefits of AT in improving health, social, and economic outcomes limits the political will to invest. Small markets with erratic procurement patterns and a proliferation of products leads to unfavourable manufacturing economics and inefficient supply chains. As a result, purchasers and users face affordability issues, limited choice, low availability, product quality concerns, and products that are not appropriately designed for the context.

Targeted interventions can overcome market shortcomings across AT

A cohesive set of interventions was identified to tackle these issues across product areas. Many of these interventions are connected and will require coordination and collaboration by a coalition of stakeholders:

- Support low- and middle-income country governments to develop comprehensive **policies**, including a national priority **Assistive Products List**, **specifications** for procurement of products, service delivery **guidelines**, and **budget** allocations.
- Establishing **procurement mechanisms** that can help facilitate **coordinated ordering** and **value-based negotiations** of assistive products.

³ Accessible versions of the reports can be found at: <https://at2030.org/publications/> or <https://atscale2030.org/product-narratives>.

⁴ USAID. (2018) *Healthy Markets for Global Health: A Market Shaping Primer*. https://issuu.com/usaidgh/docs/healthymarkets_primer_updated_2018

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- Supporting the **assessment of product quality** and dissemination of results to increase transparency and accelerate uptake of appropriate, quality assistive products.
- Developing **market reports** to enhance information sharing between buyers and suppliers.
- **Building enabling ecosystems for AT delivery**, including awareness and anti-stigma campaigns, personnel training and building delivery infrastructure.

Uptake

The product narratives are informing investments from AT2030 and ATscale, both product-specific and cross-cutting

The product narratives identified a need for increased data at the country-level as well as strengthened government coordination and leadership for AT government. In support of this need, the AT2030 programme developed a new sub-programme in partnership with the World Health Organization (WHO), GDI Hub, and CHAI. A new tool, the WHO's AT Assessment-Capacity, to help governments assess their capacity for AT provision, was tested and revised. To date, eleven countries have completed a country capacity assessment, with five more underway. A recent report published by GDI Hub concluded that the "country capacity assessment findings have already helped form the basis for new policies and, in some countries, budget allocations. In others, the findings are informing ongoing policy development."⁵

In 2020, the AT2030 programme established the AT Impact Fund as a new vehicle to scale promising solutions. Through the market landscaping, the product narratives identified innovative solutions that have the potential to disrupt AT provision and increase access in low- and middle-income countries. In October 2020, the AT Fund's Investment Committee voted to invest in one of the companies identified.

ATscale is using the product narratives as a foundation for its investment strategy, particularly in the context of its market-building and market-shaping work. The product narratives form the basis of more detailed action and investment plans from which ATscale will select specific interventions for investment. ATscale has already started to support initiatives that are foundational for strengthening the enabling ecosystem and critical for addressing specific market barriers. These initial interventions span a variety of product areas and approaches. For hearing aids and related services, for example, a cooperative network of institutions is conducting research to identify the

⁵ Bostian L. Lessons learned from assistive technology country capacity assessments 2019/2020. GDI Hub; 2020. Available from: <https://at2030.org/lessons-learned-from-assistive-technology-country-capacity-assessments-2019/2020/>

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audiological profiles of populations across a representative sample of low- and middle-income countries. This group is also evaluating the experience of using pre-programmable hearing aids, which will inform the potential scale-up of these solutions. Further, a technical partner is conducting analysis to establish fair and sustainable price targets for hearing aids and the associated road map to achieve them.

ATscale has also focused on the need for reliable data and estimates to support decision-making across product areas, as highlighted in each product narrative, and is supporting a project to provide decision makers with tools to generate the cost evidence needed to inform policy choices on the inclusion of AT provision into public systems.

Beyond the product narratives informing AT2030 and ATscale, the publication of the product narratives serves to build broad support and buy-in across stakeholders toward a unified strategy

Initial feedback on the product narratives from stakeholders highlights that the findings align with what they see as the barriers and potential actions needed. This should help support unifying stakeholders around strategies moving forward. In the short-term, it will be important to continue to make stakeholders, such as implementing partners, suppliers, donors, country governments and end-user advocacy groups, aware of the product narratives and encourage alignment to the outlined objectives. In the long-term, these objectives and associated plans for implementation will be refined based on learnings from initial interventions and continued expert input to inform a sector-wide strategy for assistive products and their related services.

