Increasing access to assistive technology by addressing the market barriers: A market shaping approach for wheelchairs.

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Background: Market barriers limit both supply and demand of appropriate AT in low- and middle income countries (LMICs). Market shaping aims to break the vicious cycle of low supply, low private investment, limited competition, and high prices that perpetuates low demand. Market shaping has proven successful in increasing access to global health products including vaccines and antiretrovirals, leading to hypothesize that these approaches could also be applied to AT markets. ATscale, the Global Partnership for AT, aims to mobilise global stakeholders to shape markets in line with a unified strategy. To inform this strategy, it is critical to identify specific interventions required to shape markets and overcome barriers. Wheelchairs are the first assistive technology undergoing analysis, which is being delivered by Clinton Health Access Initiative under the UK aid funded AT2030 programme. WHO estimates that 75 million people need an appropriate wheelchair and most lack access. The market for appropriate wheelchairs in LMICs is highly fragmented and characterized by limited government engagement, limited investment, and low willingness-to-pay and is dominated by cheaper, low quality wheelchairs failing to meet end-user needs. Non-governmental organizations (NGOs) have attempted to fill the need for context-appropriate wheelchairs, but market uptake is limited. These initial findings led ATscale and AT2030 partners to believe that market shaping could support increased access to appropriate wheelchairs.

Method: To develop a robust understanding of the market landscape and identify opportunities to increase access to appropriate wheelchairs, a mixed-methods approach is used including a grey literature review, market data analysis, key informant interviews, and site visits. The analysis outputs are captured in a market shaping strategy document that incorporates a market landscape, key barriers, and identification of market shaping objectives, recommended interventions and outcomes. The authors have sought input from experts, suppliers, and stakeholders throughout the drafting and stakeholders will provide feedback on proposed interventions through virtual roundtable discussions prior to finalization.

Key results: The process led to recommendations on marketing shaping interventions to increase access to wheelchairs. On the demand-side, incorporating proven models for provision in the health sector in line with WHO Guidelines may stimulate appropriate provision and increase predictable demand. Tools to support countries to develop roadmaps for integration around financing, policy, provision and procurement will be important enablers. Pooling resources though innovative financing, such as co-financing, may decrease fragmentation of resources available and catalyse demand. On the supply-side, the development and adoption of specifications and preferred product profiles (PPP) may strengthen procurement for context appropriate wheelchairs, decrease market fragmentation and increase market transparency. Mechanisms to secure a reliable supply for a range of affordable AT may require an approach combining technology transfer or licensing from manufacturers, regional distribution systems, and local assembly (rather than manufacturing).

Conclusion: This work provides evidence to inform ATscale’s strategy and investments and will continue to inform the approach and reach of AT2030. Interventions may include additional evidence generation, development of tools to support
decision-makers or piloting models of financing, provision or supply. The same process will be used for other priority AT.

Keywords: Market Shaping, Wheelchairs, Access.

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