Mann Global Health (MGH), with the support of the Bill and Melinda Gates Foundation (BMGF), developed a comprehensive tool kit to systematically guide condom market landscaping efforts across five countries in east and southern Africa. The report “The Condom Program Pathway” by MGH outlines the key findings of that project. The guidance in this document includes a description of the tools and their use to support condom market landscaping efforts in other countries.
Market Landscaping and the Market Development Approach

Market landcaping, or market analysis, is a fundamental element of a Market Development Approach (MDA), which aims to identify market weaknesses, constraints, or under performance that inhibit access and use of health products and services by the poor and most vulnerable. Once market weaknesses are identified, root causes are analyzed to inform the design of targeted interventions to mitigate those failings.

Market Landscaping includes analysis of core supply and demand functions that support the value chain, including the performance and role of the public sector, social marketers, and commercial actors in ensuring access to quality products by end users. Market landscaping activities also analyze other market elements including supporting functions, such as market stewardship (which include leadership and coordination of TMA efforts), quality assurance, processes supporting quantification of subsidized condoms, and others. Market functions supporting finance and the appropriate use of subsidy are included in the analysis, as is the environment including rules and regulations governing how condoms are imported, registered, and taxed.

The tools described in this document support the ‘diagnosis’ of market constraints or weaknesses through a holistic analysis of market functions.

A Curated Toolkit

A rich body of work including tools, methodologies and guidance exists to support the analysis of a health market. No single approach, however, comprehensively analyzes all of the key functions supporting a healthy market, and none of the existing tools were targeted specifically at condom markets. For example, Abt Associates has produced guidance supporting the assessment of country specific market stewardship functions, while Population Services International (PSI) built out an approach to analyze the core supply-demand value chain, which they refer to as the production to use spectrum, and functions that directly support that core value chain.

The tools described in this document reflect a curated approach that pulls together relevant elements of existing work to holistically analyze key functions supporting a condom market. The toolkit focuses on the unique aspects of a condom market, which includes the public, social marketing, and commercial sectors, and actors playing a supporting or indirect role in the delivery of health products and services. This guidance is not meant to be a stand-alone document. It is expected that users will bring knowledge of MDA in general, and the specific approaches referenced in this tool kit. The source tools used to inform this work are are included as an appendix.

The Condom Program Pathway

The Condom Program Pathway is intended to serve as an overarching framework that includes the critical elements supporting a successful condom program at the country level. Key market functions supporting the Pathway were identified based on findings from an extensive literature review, field work ‘deep dives’ in eight countries’ condom markets, and inputs from global stakeholders involved in condom programming. The Condom Pathway contains 3 distinct pillars:
1. **Condom program stewardship**, which includes functions that occur at the national level to create an enabling environment for a condom market. Stewardship requires leadership and coordination from national governments, and financing from national and external sources to support use by the poor and the vulnerable. Market stewardship also requires that policies and regulations (e.g., the taxes and tariffs imposed on condoms distributed in a country) create an enabling environment for all market players and strengthen condom markets in the long run.

2. **Condom market development** is the process of improving the condom “category” within a country. This is an aggregation of all the market actors across the core functions of demand and supply necessary to grow the condom market equitably and efficiently. Condom market development includes a well-functioning product value chain for all channels of condom distribution, as well as sufficient demand across all population groups. For an overall understanding of the condom market and to measure performance, good market analytics must be available for all market players, including government agencies, donors and implementing agencies.

3. **Condom market management** occurs at the product level and focuses on functions implemented by individual market actors, including public sector, commercial or not-for-profit players. The primary objectives for these market actors fall along the spectrum of equity and sustainability as the driving force of program design or business model.

Figure one, below, outlines the three pillars supporting the Condom Program Pathway, and priority functions that fall within each pillar.

**Figure 1: The Condom Program Pathway**

- **Condom Program Stewardship**
  - Leadership & Coordination
  - Financing
  - Policy & Regulation

- **Condom Market Development**
  - Market Analytics
  - Supply
  - Demand

- **Condom Market Management**
  - Equity
  - Sustainability
Overview of Tool Catalogue & Guidance on use

Given the diversity of actors within a market, and broad information required to assess market performance, a number of tools were developed to assess the priority functions that comprise a market. Each individual tool, the purpose, and guidance on use are described below. Each tool component is described in more detail following the table.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Purpose</th>
<th>How to use</th>
<th>Who to use with</th>
</tr>
</thead>
</table>
| #1- Comprehensive Indicators | • Organize data collection and presentation in context of the Condom Program Pathway;  
• Quickly assess overall market performance against critical building blocks, or functions, supporting the Pathway  
• Source data to inform the condom market dashboard (explained in detail below) | • The indicators lay out critical aspects of market analysis supporting landscaping efforts. It may be helpful to think of the indicators as the ‘skeleton’ supporting the analysis – further information can be used to flesh out the core elements of the skeleton.  
• Definition guidance for each indicator is included on the indicator sheet.  
• The indicators are cross-walked to the two main information gathering tools (KII & Landscaping Guidance) that will inform how each indicator is ‘scored’. More detail is embedded in the landscaping guidance and KII, with direct links provided.  
• Cross-walking of the indicator form to core tools should a) support data gathering by clarifying the information of what we’re aiming to get and b) support analysis by organizing data collection.  
• Individuals conducting market assessments can fill in the comprehensive indicator sheet throughout their assessment – it is, in effect, a cumulative presentation of the market analysis.  
• Used in conjunction with the Dashboard, indicators can support benchmarking of country markets, while cumulative scoring can flag country specific strengths and weaknesses in market functions. | Internal document to organize analysis |
| #2 Key Informant Interview (KII) Guide | • Systematically collect data during country specific market analysis  
• Supports understanding of condom programming, focusing on the Stewardship &  
• The KII has been structured to capture information in a systematic way in support of the Condom Program Pathway. While long, its unlikely all questions will be used for each interview – and it’s not necessary to ask every question.  
• In actual application, it’s a good idea to speak with well-informed stakeholders early in the assessment, such as with the condom focal point at the MoH, or a condom social marketing manager. After the | Focus on stakeholders such as condom focal points in the MoH, informed donors, and condom programmers. The |
| #3 Condom Market Landscape Guidance | Outlines general approach to landscaping the core production-to-use spectrum; primary focus is to inform the Market Development Pillar. | Pulls together general approach to landscape the core manufacturing-to-use spectrum, drawing heavily on PSI approaches and tools. Indicator guidance (that is, the type of information collected) is embedded in the document, with links to supporting guidance/tools. *This tool leveraged work of PSI, Springfield, Abt and the USAID market shaping primer.* | KII does not necessarily target actors in the mkt (although SM & NGOs & select government entities may serve multiple roles in the market) |
| #4 Value Chain Analysis | Systematically collect data related to the Market Development and Market management pillars, focusing on players in market. Will support description of market and support identification of market failures. | The Value Chain Analysis questionnaire has been tailored to condom markets. Directly links into Tool #3, and is essentially the KII for market players. This tool leveraged work of PSI. | Actors in the market – commercial, SM, NGOs as well as gov entities supporting delivery. |
| #5 Data Analysis & Charts: 5.1 Condom Dist wksht 5.2 Free Dist wksht 5.3 Charts & Graphs 5.4 Mkt Reliance on subsidy 5.5 Condom Use wksht 5.6 Condom Availability 5.7 brands wksht 5.8 Donor Analysis wksht | Tools to support analysis of market data, organize presentation of data in consistent manner, and feed into reports. | Use individual worksheets as guide to collect & present data. Instructions for each worksheet are embedded in each worksheet. Tools will inevitably need to be tailored to specific market data available. Can be thought of as way to organize and present data. Graphs and charts are automatically generated. Guidance on use of each worksheet is provided in text box on each worksheet, with some comments embedded in cells. | Internal doc to support analysis, creating charts to reflect data. |
| # 6: UNAIDS Condom Needs Assessment Tool | Tool producing condom needs estimates at a national level and by sub population. An efficient way to estimate existing condom | The Condom Fast Track Tool was developed by UNAIDS to produce condom needs estimates at a national level, which can be rolled up to support regional and global estimates. The tool generates estimates of total condom quantities and funding required to achieve national targets, disaggregating condom need by behavior, by specific populations such as ... | Internal analysis, has been successfully used with working groups in countries to identify the gap |
use and total condom needs to meet country targets. Instructions included on tool.

sex workers, and by whether condoms are needed for HIV prevention or family planning purposes. The Fast Track Tool also highlights the gap between current condom use and needs, and can help model a total market approach to sustainable condom markets, factoring in contribution across sectors in all channels of delivery – important when developing a vision for a healthy market supporting sustainable condom use.

Instructions included on the tool

### #7: Market Structure format

| Sample presentation of market structure (distributor – end user) & role of government | Guidance to visually present the market structure. Can be helpful to generate and understand overall distribution channels and product flows of a condom market. | Internal analysis, will inform presentation |

### #8: Who does, who pays

| Analysis mapping out who pays for current key functions in the market – ie, donors, government, out of pocket) and who performs specific functions. | An important element of turning the corner to design of interventions is mapping out who currently does, (or performs key market functions), and who currently pays (funds) key market functions in the current and future state. For example, commodity procurement may currently be performed by an NGO, and paid for by external donors now. In the future, a vision of a healthy market may include commodity procurement performed by commercial sector and paid for by the government or out of pocket payments. | Internal analysis tool. |
Tool #1- Comprehensive Indicators & the Dashboard

Indicators are a de facto master plan, key information to guide data collection to address the key indicators outlined in the document, in addition to other information about the condom market landscape. This is an internal, excel based tool that can be used both as you collect data, and after you have completed your field visit. The following notes guide you through how to use this tool.

This is an excel tool. There are 7 tabs

Tab 1 is the only tab to enter data; Tabs 2 to 7 are reference documents which were developed under a different context and made available here as a point of reference.

When you open Tab 1 – Consolidated Indicators you will find the following headings:

Pillar: There is no need to ‘fill’ in anything here, it is just to help navigate the file. The Condom Program Pathway is intended to serve as an overarching framework that includes the critical elements supporting a successful condom program at the country level. The Condom Pathway contains 3 distinct pillars - Condom Program Stewardship, Condom Market Development and Condom Market Management.

Functions Pathway: These are the 8 core functions, or elements of the Pathway, describing key functions supporting each pillar of the market.

#: This is the number given for each indicator. Each number is made up of 3 digits (e.g. 1.2.3). Indicators for stewardship all start with 1, market development start with 2 and management start with 3. The next number refers to the element of the Pathway, so under stewardship, all indicators for leadership and coordination will be 1.1, policy and regulation would be 1.2, finance will be 1.3. Leadership and coordination has 10 indicators going from 1.1.1 to 1.1.10, whereas policy and regulation has 4 indicators going from 1.2.1 to 1.2.4.

Indicator: This is a short descriptor of what the indicator measures. You will see there are some duplications, e.g., 2 indicators with descriptor ‘leadership and coordination’ but they have different numbers (see above).

Tool taken from: This refers to the external tools (Tabs 2 to 7) that informed the curated indicators supporting the Condom Program Pathway. These are for reference only.

Indicator Definition: This is a summary of what the indicator is measuring. As all the indicators selected came from a ‘bottom-up’ approach from a literature/desk review, this summary supports why the indicator has been included.
| **Unit, Yes/No** | This column shows how to measure the indicator. Is it something that can be quantified, if so how? Or is it something that is either present or absent? |
| **Denominator:** | |
| **Numerical Score:** | Indicators are scored as a 0, .5, and 1. Specific guidance is provided to outlining the scoring strategy of each indicator, but generally boils downs to: 0 = No or Not fit for purpose; .5 = Yes but insufficient quality; 1 = Yes of sufficient quality/fit for purpose. Note that in many cases scoring is subjective, and it’s important the assessor rolls together all they know and understand about that particular indicator. In many cases, a strategy may exist, but it is not funded, does not drive programmatic decisions, and is not managed to. In that case, the scoring for that indicator would be “Yes, but insufficient quality.” |
| **Comments & Follow On questions:** | In this column are some suggestions of follow on questions you might need to ask to support the interpretation of the data. Please note – this column is not exhaustive and merely gives an indication of what you might ask. Depending on the situation you encounter in country, other or subsequent questions may be needed. |
| **Data Collection Tool:** | This column flags which tool you will use to get the data. For example, will this information be available from key informant interviews, from government data or from private sector or donor reports. Again, this list is not exhaustive and you might find other sources of data that can help you capture the indicator. |
| **Frequency:** | This refers to how often the data are available or change. You can update this if you find that the frequency is more or less than suggested. |
| **Disaggregation by:** | Some data need to be disaggregated by gender, geography, or outlet type and this column will provide some guidance. |

Other things to note:
It may not be possible to complete all the indicators because of missing data. In such cases, record why it is not possible to complete an indicator or why the information is not available. In some instances, you might need to use proxy data for an indicator - for example indicator 2.2.5 is about stock outs of condoms and aims to understand the number and percentage of storage facilities that had a stock out, by condom type. If this information is not available, a proxy indicator might be data from a survey where respondents had reported unavailability of condoms as a reason for discontinuation of use of condoms. Although we would not know the extent of the stock out, the data does provide an indication of the size of the problem -- if, for example, 60% of respondents reported this in the survey, and anecdotal evidence from other reports confirmed it, the information could be triangulated to show that a stock out happened.

In many cases, a score is an attempt to identify known weaknesses based on the data on hand and feedback from key informant interviews. Triangulation of data is often required.

Country Dashboard
This project collaborated with USAID on the development of a condom dashboard. The purpose of the dashboard was to apply the framework of the Condom Programming Pathway to provide opportunities for...
country comparison and trends to show the current status and any movement towards better-developed markets in support of equitable and sustainable condom use. It is recommended that this dashboard be further developed and used in focus countries.

The indicator list that was developed to guide the analysis of the country case studies was the main tool used for the dashboard. Each function within the Condom Program Pathway has one or more indicators that contribute to the overall score of that function within the Pathway, as each indicator has been weighted and scored. The scorecard for each indicator uses a simple numerical allocation to indicate: the functions that are in place, acting as drivers on condom program marketing and delivery; functions that impede condom programs and markets and require attention; and functions that are inadequate, constituting a barrier to successful condom markets and programming and which are a priority for reform. The dashboard is a performance management tool. If repeated over time, the dashboard scorecard could be used to systematically track market progress and trends.

Over time, analysis of country dashboards can be helpful in understanding important cause-and-effect relationships in the condom market. If managed well, these would be expected to lead to a functioning total market where players and functions are aligned to achieve a healthy condom market. Thus, the dashboard can be used to:

- Benchmark the Condom Program Pathways in each of the example countries and provide an assessment on the stage of market development;
- Use cumulative scoring to flag country specific strengths and weaknesses in market functions supporting the Condom Program Pathway, and relative to other countries – e.g., benchmarking within a region or similar GDP category;
- Educate and inform market stakeholders (donors, governments, actors) on the importance of market intelligence and critical programmatic elements supporting sustainable condom markets;
- Advocate for interventions and resources to improve market health. Findings could influence general investments in program functions (the dashboard indicates stewardship is weak across many countries, creating a barrier to sustained use, so let’s invest there) or begin deeper dives to zero in on country specific interventions by donors.
- Highlight data gaps and indicator ambiguity.

The dashboard represents a snapshot of the current state of condom markets and programming in each of the countries, and allows for country comparison and comparison to the mean of all countries. Figure 4 below presents the dashboard for the Condom Program Pathway for the five countries assessed for this assignment.

Figure 2: Condom Program Pathway Dashboard summary for 4 countries against the mean from all 4 countries
Tool #2 Key Informant Interview Guide

This word-based interview guide aims to assess certain functions supporting the condom pathway. Guidance for use is already provided in the tool. The key things to note are:

- Questions are aligned against the indicator so the user can check back to ensure that processes have collected all the relevant information.
- As the survey is long, it is not expected that all questions will be asked of any one participant. A key role for the interviewer is to identify those informants early on that are likely to yield optimum information, and solicit information using the guide as just that – a prompt to get information.
- If you are happy and satisfied that another respondent has given you correct information then no need to repeat the questions with a different interviewee. However, there are some indicators that are more subjective/opinion-based and might benefit from different perspectives from different types of stakeholders.
- This tool is really focused on getting the information you need for the stewardship pillar, with complementary information supporting the other two pillars.
- The recommendation is that you try and do your most ‘comprehensive’ interviews upfront so that you can get as much of this information early on. You can then use subsequent information for plugging gaps.

Tool #3 Condom Market Landscape Guidance

This tool (Word tool) leverages external sources for a traditional market landscaping and thus focuses mostly on the market development pillar, and to a lesser extent, stewardship. As the user goes through this tool, it is possible to see that it is aligned to the indicators in tool #1 so that it provides a checkpoint to ensure all the relevant indicators in the “master plan” have been assessed.

The purpose and description of each resource are described, as well as guidance on where to get data. You will see that Tool #2 includes indicator definition sheets that provide the headings for the columns in tool 5 where you report on the indicators.
Tool #4 Value Chain Analysis

This tool can be used as an interview guide for conversations with market players. It is essentially a large matrix that has the following column and row headings. Questions and guidance have been included in each of the boxes to help you get the data you need.

<table>
<thead>
<tr>
<th>Players</th>
<th>Importers</th>
<th>Distributors/Wholesalers</th>
<th>Retail outlets</th>
<th>Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
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<tr>
<td>Price</td>
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<tr>
<td>Place</td>
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<tr>
<td>Promotion</td>
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<tr>
<td>Supporting Functions/Enabling environment</td>
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<td>Information</td>
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<td>Guidance</td>
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<tr>
<td>Coordination</td>
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<td>Financing</td>
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<td>Quality Assurance</td>
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<td>Labor Capacity</td>
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<tr>
<td>Rules and Regulation</td>
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<tr>
<td>Registration</td>
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<td>Policy and Regulation</td>
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<tr>
<td>Informal Rules</td>
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<tr>
<td>Taxes and Tariffs</td>
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</tbody>
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Tool #5 – Data Analysis and Charts

This suite of tools presents a set of templates and methods of analysis to pull country specific data together, which can then be put into a PowerPoint template, report, or other format. This tool is an excel tool, with 8 tabs.

5.1 Condom Distribution: There are two main tables on this sheet, and you will input data into the orange cells. If you scroll down to the bottom you will find guidance on how to use the tool. It is important to have reviewed this and the other tools in advance of your interviews so you know what data you need to collect and input.

5.2 Free Dist Breakdown: There is one table on this sheet. As well as putting in the numbers in the blank boxes you can also put in the names of the donors or NGOs.

5.3 Charts & Graphs: This sheet presents ideas on the visual representation of the data you have collected once you have returned following the deep dive. Again, being aware of what data you need before you conduct the interviews will help to ensure you get the information that is needed.

5.4 Mkt reliance
On subsidy: Market reliance on subsidy is a key indicator that maps out a country’s external reliance on subsidy. As with condom distribution, you need to input data into the orange cells. Please note that some additional guidance is given in comments and if you click the red triangle in the corner of the cell this will pop up. The key element we’re measuring here is external reliance on subsidy – some governments do procure condoms using domestic resources – which in the long term are presumed to be less volatile and more sustainable in the long run. For Social Marketing brands, cost recovery is the money collected from the sales of condoms to the private sector – or program income. Cost recovery is the cost of the commodity, packaging, and shipment into country, less program income received from sales. If it costs US $0.10/condom for commodity, packaging, and shipping – and program genets revenues of $0.05/condom, then the product is 50% cost recoverable.

5.5 Condom Use: Fill this out with the best data available including country specific DHS, National Integrated Biological and Behavioral Surveillance (IBBS), which can be found at [www.aidsdatahub.org](http://www.aidsdatahub.org), and relevant up to date, population-specific use data that exist. As per the previous tool, you will find some additional guidance in comment boxes attached to individual cells.

5.6 Condom Availability: This data should be available from government and social marketing organizations – you may have to use different sources to fill out the relevant sections of the table.

5.7 Condom Brands: This sheet collates detailed information on each brand of condom including brand attributes, packaging, sales volume, distributors, manufacturers etc. As with other tabs of this excel sheet, it is good to be familiar with the data you need for this tab before you go to the field.

5.8 Donor Analysis: This tab is a matrix of the information you will collect from all donors summarized in one table. It should be straightforward to complete.

Tool # 6: UNAIDS Condom Needs Assessment Tool
The Condom Fast Track Tool was developed by UNAIDS to produce condom needs estimates at a national level, which can be rolled up to support regional and global estimates. The tool generates estimates of total condom quantities and funding required to achieve national targets, disaggregating condom need by behavior, by specific populations such as sex workers, and by whether condoms are needed for HIV prevention or family planning purposes. The Fast Track Tool also highlights the gap between current condom use and needs, and can help model a total market approach to sustainable condom markets, factoring in contributions across all channels of delivery – important when developing a vision for a healthy market supporting sustainable condom use. Detailed instructions on use of the tool are attached.
Tool #7: Market Structure Format
Visually mapping the flow of products from manufacturer to consumer can be an extremely helpful way to both understand how a market functions, including the depth and breadth of importers, distributors, retailers, health facilities and outreach workers - and how beneficiaries interact with the value chain to access products. Gaps and weaknesses in the value chain can emerge. This tool is a graphic that captures the value chain from production to user for free, private and SM condoms in a country. The example given is for Cameroon.

Resources Informing Tool Creation


UNFPA 2010 Comprehensive Condom Programming: A guide for resource mobilization and country programming


HEALTHY MARKETS FOR GLOBAL HEALTH: A Market Shaping Primer, USAID, lead contact Amy Lin and Joe Wilson,
