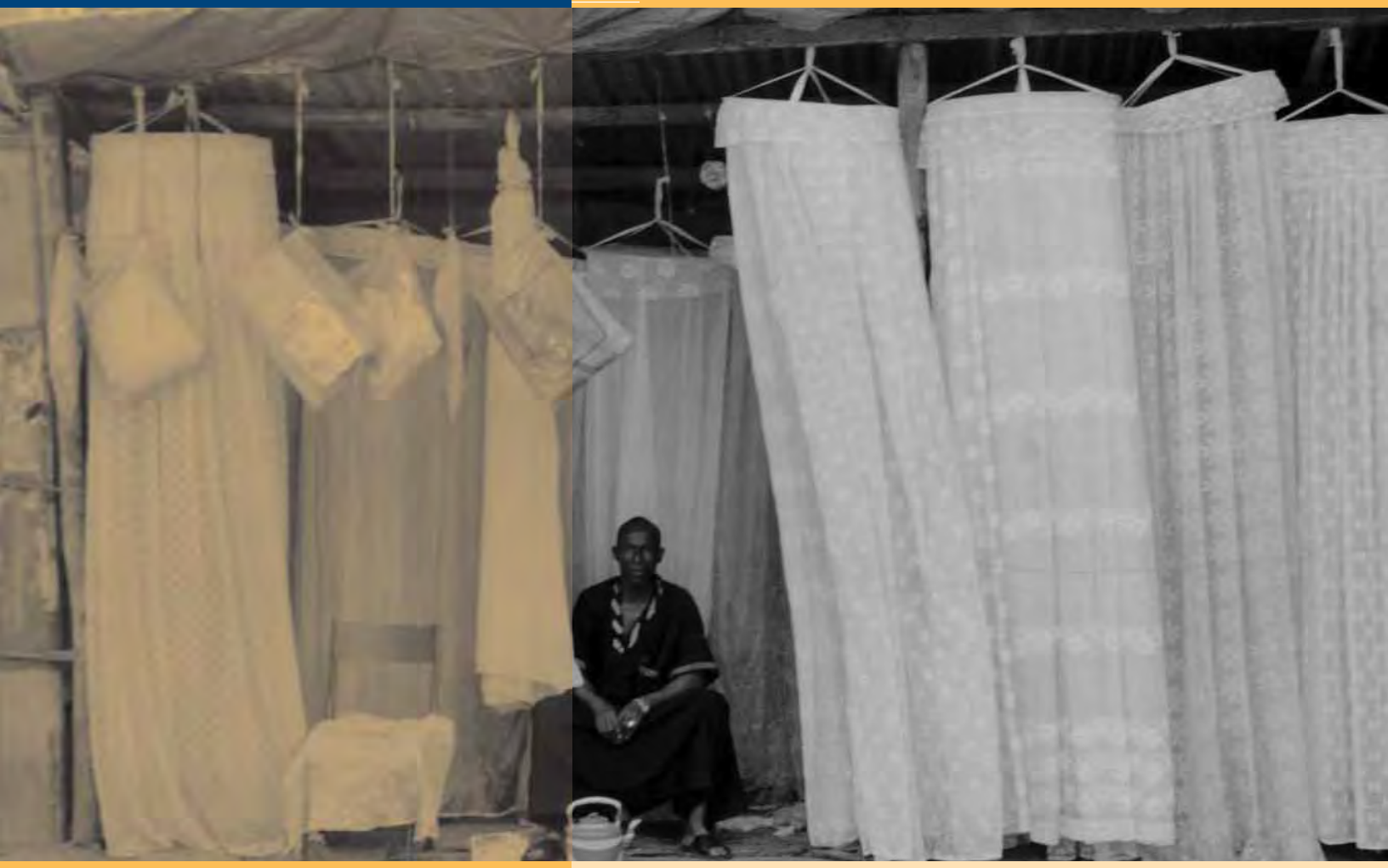
NetMark:

A Case Study In Sustainable Malaria Prevention Through Partnership with Business

An AED Case Study



AED

Center for Private Sector Health Initiatives

Global Health, Population, and Nutrition Group

About AED

Founded in 1961, the Academy for Educational Development is an independent, nonprofit organization committed to solving critical social problems and building the capacity of individuals, communities, and institutions to become more self-sufficient. AED works in all the major areas of human development, with a focus on improving education, health, and economic opportunities for the least advantaged in the United States and developing countries throughout the world.

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AN AED CASE STUDY

NetMark Accomplishments 2000-2005

- More than US $18 million has been invested by private sector partners in developing the commercial ITN market in Africa.
- Nearly 15 million more people are protected from malaria by insecticide-treated bed nets (ITNs).
- More than 100 million people have been educated about malaria, the importance of ITNs and how to use them effectively.
- More than 350,000 pregnant women and children under five have gotten discount vouchers for ITNs, of which 243,000 have been redeemed.
- Treated nets now cost from 30% to 75% less than untreated nets did in 2000 due to competition fostered by NetMark.
- NetMark has increased the supply of ITNs in eight African countries, with the number of ITN distributors increasing from 2 in 1999 to 29 in 2005.

Executive Summary

NetMark is a unique cross-sector partnership created to fight malaria in sub-Saharan Africa where the disease kills more than two million people each year. It was initiated by the United States Agency for International Development (USAID) and developed under the management of the Academy for Educational Development (AED), a nonprofit human and social development organization.

NetMark's mandate is to increase demand for and expand the availability of insecticide-treated nets (ITNs), a simple but effective way to prevent the mosquito bites that cause malaria. To accomplish this task, AED has developed a market-based approach of shared risk and investment dubbed Full Market Impact ™ (FMI™), based on the premise that as demand grows within a competitive market, consumers will benefit from improved quality, lower prices, and wider availability.

FMI™ provides an operational model that creates common ground between the private and public sectors. Partners from both sectors agree on common objectives while observing their respective roles across each of the five factors: supply, distribution, affordability, demand/appropriate use, and equity/sustainable markets.

NetMark's FMI™ model was intentionally designed to reflect the way businesses thought about the market, thus the model's convergence with the classic "4 Ps" of marketing: product, place, price, and promotion. In this way, FMI™ demonstrates how meeting the needs of the poor can translate into good business that promotes expansion into new market segments. AED believes that FMI™ challenges the way businesses think about market opportunity, taking a broader view of the role their products play and the consumer behaviors they influence, while addressing critical public health issues and serving the needs of the poor.

In its six years, the NetMark project has shown that international and African companies are willing to invest in producing, marketing, and distributing ITNs when working in partnership with the public sector.

Data from household surveys conducted by NetMark in 2004 show considerable gains since the baseline research in 2000 and the first country launch in late 2001. In all NetMark countries, awareness and use of nets and ITNs increased dramatically, and more nets are being treated or purchased pre-treated. For example, the percentage of households that owned a net or ITN in Nigeria rose from 12% in 2000 to 27% in 2004; in Senegal from 34% to 56%; and in Zambia from 27% to 50%. Moreover, NetMark's commercial sector approach resulted in increased use among all socio-economic groups. Net coverage rates are increasing equitably, and vulnerable groups are being reached in both urban and rural areas.

By 2004, ITN sales by NetMark's formal partners neared the 2 million mark. While this represented only 62% of the ambitious projection total made by the various commercial partners for 2004, it did represent a 132% increase over 2003 sales. Progress is being made in a sustainable manner, and the market appears to be poised for rapid growth now that supply issues are being addressed. Overall commercial sales in NetMark countries have reached 9 million based on reports from partners, and estimates of additional sales made by NetMark based on market research conducted in 2004. This demonstrates the broad impact NetMark has had on growing the overall market.

Challenges still lie ahead. Public policy must continue to support ITNs and a role for the commercial sector; free and subsidized ITN programs must be fully targeted to the poorest and not totally undermine commercial investments; NetMark and partner marketing efforts must continue to build sustainable demand; and NetMark's commercial partners must expand their investment in ITNs to replace the support provided by NetMark. Under these conditions, the ITN market will continue to grow while serving the public health fight against malaria.

Malaria in Africa and the Roots of NetMark

MALARIA IS A MOSQUITO-BORNE DISEASE that has a devastating health and economic impact. An estimated 300 to 500 million cases each year cause 1.5 to 2.7 million deaths, more than 90% in children under 5 years of age in Africa[1]. In addition, Africa loses $12 billion in GDP p.a. due to malaria[2], due to the inability of millions to escape poverty.-

In 1998, the World Health Organization (WHO), United Nations Development Program, United Nations Children's Fund (UNICEF), and The World Bank Group launched a partnership called Roll Back Malaria (RBM). RBM provides a coordinated international approach to fighting malaria. In 2000, member states of the United Nations committed to reducing malaria as part of a global framework for measuring development progress—the Millennium Development Goals.

In response, the United States Agency for International Development (USAID), the arm of the government responsible for development assistance, initiated a five-year, $15.4 million effort called "NetMark." Well aware that economic development is the key to social and economic progress, USAID wanted to engage the private sector in the fight against malaria, and at the same time foster economic development in Africa.

NetMark's original mandate was to establish commercial markets for ITNs in three to five countries in sub-Saharan Africa. NetMark was asked to work with the private sector to increase demand, appropriate use, availability and affordability of ITNs, and determine the extent to which the private sector could meet the demand generated by the project. The project began in 1999 and was slated to end in 2004. In 2002, however, because of positive results, NetMark was extended until 2007, the funding ceiling was increased to $65.4 million, and the project's mandate was expanded to include development of "targeted subsidy" programs. The project is now at work in eight countries—Ethiopia, Ghana, Mali, Nigeria, Senegal, Uganda, Zambia and Zimbabwe, and is looking to expand to Cameroon in 2005. During the past six years, NetMark has evolved under the management of a nonprofit, charitable 501(c)(3) organization, the Academy for Educational Development (AED).

A Market-Based Approach

Net stalls in a Nigerian market

AED employees David McGuire, Will Shaw, and Camille Saade had long been incorporating the private sector into their public health projects. Mr. McGuire had lived for many years in developing countries, where he managed social marketing programs. Dr. Shaw was an expert in behavior change and communications with years of international field experience. And Mr. Saade had a background in the pharmaceutical industry and in the implementation of social marketing programs. However, NetMark was their first chance to integrate what the development community came to call "public-private partnerships" as a core project model and on a large scale. Together, they tailored a market-based approach to convince the commercial sector, other non-governmental organizations (NGOs), and public sector players to turn malaria prevention into a sustainable business, supplying ITNs currently purchased by donors.

During the design of NetMark, USAID took a hard look at the traditional social marketing model, which allowed NGOs to build brands through subsidized marketing that existed only as long as funding existed. In the past, the public sector had engaged the commercial sector in the role of ***commodity supplier*** rather than ***brand marketer.*** Under NetMark, the commercial sector was asked to make a real commitment to building its own brands. For the first time, the public sector—via NetMark—would assist in the creation of market conditions that would enable business growth. If NetMark were successful, it would work itself out of a job as the commercial sector, under its own power, sustained the market and created a sustainable supply of ITNs in malarious areas.

In 1999, AED forged a partnership with SC Johnson, a global leader in the marketing of consumer insect control products. Mr. McGuire and Dr. Shaw, who had become NetMark's Director and Deputy Director, respectively, felt it necessary to work with a company that had insect control as part of its core business and that had the distribution and marketing capacity to take on a new product under an existing well-known brand. Such a relationship would increase the likelihood of creating a viable ITN market in at least four countries—as stipulated in the agreement between USAID and AED—within the original five-year timeframe of the project. They both understood that there was a risk in partnering with a company that did not have nets or net treatments as part of its current business, but strongly felt that the consumer product development and marketing capacity of SC Johnson as well as its multi-national, sub-Saharan distribution network

"…they wanted their businesses to be committed to more than 'just making a profit.'"

was a critical advantage that was not found in any of the other company units that were producing nets and treatment kits. SC Johnson made it clear from the start, however, that it would work closely with NetMark on conducting extensive market research before it would make a final commitment to develop and market a RAID® line of ITNs.

When the market research yielded mixed results with regard to the potential for developing an ITN market in Africa, SC Johnson proposed launching a test market of its newly developed ITN treatment during the first year in Nigeria, before making a final decision to roll out on a larger scale after three to six months. SC Johnson had understandable concerns about the viability of a commercial ITN market in an environment of low ITN demand, highly subsidized and free ITNs as competition, and uncertain tax and tariff policies. In addition, its timeframe was not consistent with NetMark's commitment to USAID to launch in at least four countries on a national scale. SC Johnson ultimately decided that it was not a good business decision for it to enter the ITN market at that time, and it made the decision to withdraw from the partnership.

At this point, AED and USAID contemplated whether NetMark could continue. Mr. McGuire and Dr. Shaw made a case to AED's senior management and to USAID for presenting market data to all major net and insecticide manufacturers to determine if these manufacturers would reach the same conclusion as SC Johnson. They pointed out that:

1. The data could be interpreted differently, particularly because some of the analysis was based more on developed markets in Europe and North America than on those in Africa;
2. This bias resulted in lower sales projections than might be achievable; and
3. Companies that were already producing ITN products (nets or treatment kits) were already active in the donor market and might be willing to expand into the commercial market.

The six major suppliers of nets and insecticides at the time—Aventis, Bayer, BASF, SiamDutch Mosquito Netting, A-Z Textiles, and Vestergaard Frandsen—were subsequently contacted. Each company agreed to accept a visit at its headquarters by Mr. McGuire and Dr. Shaw to discuss AED's compelling value proposition: "How would you like to at least double your marketing budget and gain the support of key policy makers and community groups to enter a new market where few competitors exist, all while saving the lives of millions?"

Mr. McGuire and Dr. Shaw left on a 10-day trip across three continents to sit down with each company and present data showing that a large percentage of potential consumers who tried ITNs liked them, were willing to pay commercial prices for them, and expressed an interest in purchasing them if they were made available.

Within six months, NetMark had negotiated partnerships with each of these companies, which, at the time, represented almost 80% of the estimated global production of nets and insecticides. Some manufacturers perceived an opportunity to share investment risk to build a commercial market where one did not exist; others hoped to gain first-mover competitive advantage by establishing their brands in the minds of hundreds of millions of future consumers; and others, while not convinced of the business opportunity, wanted to ensure they were not excluded from a new venture. And, in the words of several, they wanted their businesses to be committed to more than "just making a profit."

The realities of working with the commercial sector quickly became apparent with ongoing consolidation of the global insecticide industry, the beginning of a transition of the net industry from donor tenders (donor-funded procurements through a competitive bidding process) to a consumer market, and the challenge of getting the global net and insecticide industries and country distributors to work together to market affordable ITNs that met international standards. But through mergers and acquisitions among partners in the insecticide industry, and through resulting shifts in ownership of product lines, lay-offs, and office closures, the NetMark team persevered.

A Catalyst Model

NetMark, by design, would act as a catalyst and was therefore dependent upon its partners for execution and achievement of its objectives. NetMark was to take an active role in implementation by sharing risk and investment with the commercial sector while helping it build its commercial brands and businesses.

First-year results showed sales of over 910,000 ITNs and 600,000 re-treatment kits, well short of NetMark's original targets of 2.2 million ITNs and re-treatment kits. However, much of the shortfall was due to delays in launching programs rather than lack of demand. The initial approach of focusing on commercial expansion suffered various setbacks typical of developing a non-existent market, and the problem was exacerbated by highly subsidized product and product giveaways by various NGOs, ministries of health, and donors which were not carefully targeted to the most needy. But evidence of the efficiency of the commercial approach began to appear. In Zambia, for example, NetMark's partners were selling ITN products (unsubsidized) for less than "socially marketed" (donor-subsidized) ITN products. Early gains were made by a well-crafted advertising and promotion campaign produced by NetMark and adapted to each participating country.

Nevertheless, it became obvious that NetMark needed better coordination with other players to address the need to segment markets and to assist ministries of health and donors in better targeting limited resources to the poorest populations as the commercial sector targeted those who could afford to pay. NetMark also needed to answer public sector opposition to its strategy: Influential persons were claiming that it was immoral to build an ITN market "on the backs of the poor," which was not the intent. This opposition occurred in an atmosphere in which most public sector officials were highly suspicious of the commercial sector, and in which many businesses perceived the government to be an inefficient and untrustworthy partner.

In 2002, the international RBM Partnership issued a strategic "framework" that promoted building a "sustainable system that guarantees access to ITNs for the most vulnerable, while harnessing the entrepreneurial spirit and efficiency of the private sector. Planning such a system raises important issues concerning subsidies and the interaction between public and private sectors."[3] Recognizing the need to create a broader mechanism to support RBM goals, USAID expanded the mandate and funding of NetMark, which was originally focused entirely on generating demand for ITNs and helping partners build their businesses to meet that demand. AED developed a concept paper for "NetMark Plus," which detailed a three-pronged approach of commercial expansion (the original focus), market priming, and equity, all to improve the impact of NetMark. NetMark and its partners would now build a solid commercial market while expanding outlets into areas not served by the commercial sector and would deliver subsidized product to the poor in ways that would expand rather than undermine commercial markets.

With additional funding for NetMark Plus came additional pressure to deliver public health impact on a larger scale and to deliver it quickly. This pressure put new demands on NetMark's commercial sector partners and created a tension between delivering public health benefits while building a sustainable market. The NetMark team recognized the need to work with the commercial sector to develop new strategies for faster market development, while managing the expectations of a broad array of public and private partners and stakeholders. Friction often arose when NetMark pushed international and national commercial partners to expand their ITN business more rapidly than their normal business practices allowed.

NetMark Partners

When NetMark was building its partnerships, it asked all interested companies to submit proposals that included draft marketing plans and a demonstration of commitment to invest in developing the ITN market for their brands with NetMark support. NetMark turned down one company because that company was not prepared to invest its own money. After negotiating with each company, AED signed collaborative agreements that spelled out roles, responsibilities, and objectives. In order to maintain competition, NetMark selected at least two partners for supply and distribution in each country. Partners with whom AED has agreements in place are considered "formal partners."

But NetMark is interested in increasing overall use of ITNs. It has developed generic materials that support all sales and the general use of ITNs, even if they are given away for free. While the project provides support to its "formal partners" to help them leverage their investment in building their brands, it also has begun building partnerships with importers, traders, and retailers who do not have formal agreements in place but who benefit from NetMark's information sharing, campaigns, and attempts to link them with good net and insecticide suppliers. These groups are referred to as "informal partners."

The expansion of NetMark also necessitated the hiring of additional staff to ensure solid links with all partners at the country, regional, and global levels. Originally, the project limited staff to offices in Washington, D.C. and Johannesburg, South Africa, relying on local communication and commercial partners at the country level to conduct day-to-day implementation. NetMark's original philosophy was to avoid building an office and staff structure in every country according to the normal "international development" approach, when it was clear that any such structure would be disbanded at the end of NetMark and when NetMark's goal was to build markets sustained by local organizations. NetMark's expanded mandate under NetMark Plus and the problems that occurred without country representation, however, made it necessary to hire local staff and open country offices.

Today, NetMark's headquarters is based in Washington, D.C. in AED's main office. The Washington team is responsible for overall project management, global partnerships, research and evaluation, and various kinds of technical support. The Johannesburg regional office is responsible for day-to-day oversight of country operations and the maintenance of relationships with regional commercial and communication partners. Country offices are responsible for the implementation of plans, the provision of support to commercial partners, and interaction with USAID missions, ministries of health, NGOs, and other RBM partners.

As NetMark grew, it became different things to different players. Known by the public health community as a "public-private partnership," it also began to fit what the private sector called a "cross-sector partnership." Throughout its evolution, NetMark benefited by stability with its participating personnel and with its partners—USAID as the donor/client, AED as project manager, commercial sector and NGO players as project executors, and RBM and its multilateral partners as champions.

U.S. Agency for International Development (USAID)

USAID is an independent federal government agency that receives overall foreign policy guidance from the U.S. Secretary of State. Its work supports long-term and equitable economic growth and advances U.S. foreign policy objectives. From the

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beginning of the project, USAID was committed to developing a new market-based model to build upon its 20 years of funding for traditional social marketing. This consistency has allowed NetMark the funding and flexibility over six years to develop both a new development model and a commercial market.

Dr. Dennis Carroll, Senior Health Advisor in the Bureau for Global Health in USAID's Washington, D.C. office, provided vision and unprecedented support by believing that a new development model would only arise through experimentation and calculated risk-taking. Staff in-country at USAID Missions, however, held a range of perspectives about how to best increase ITN use (e.g., traditional social marketing, free giveaways, partnership with the commercial sector, and various combinations of these), and it was the responsibility of the NetMark team to obtain support from both USAID headquarters and local missions.

NetMark felt that traditional public health measures of success, such as number of ITNs distributed, were not good indicators of the progress being made with this bold new concept; who was receiving product and the level of sustainability being created were also important considerations. Early metrics disappointed the public sector's expectations, particularly when most countries were focused on achieving the RBM goal of 60% coverage of pregnant women and children less than five years of age by 2005.

Academy for Educational Development (AED)

Founded in 1961, AED is one of the world's leading human and social development organizations. Independent and nonprofit, AED is committed to solving critical social problems through education, research, technical assistance, and social marketing. Its major areas of focus include health, education, youth development, the environment, and leadership development. The NetMark team had to manage stakeholders both external and internal to AED. NetMark's success in attracting partners created the classic organizational issues associated with fast growth. There was a constant need to bring new people on board and to reorganize in order to serve the needs of the growing partnership. The broad business skill set necessary to implement NetMark necessitated hires outside of AED.

NetMark's regional manager, Dr. Shaw, described the situation as "dealing with 30 CEOs at once, all with their own agendas." At present, NetMark is struggling with its own headquarters-regional-country organizational issues and the need to decentralize decision making to the country level and build capacity among country managers. And RBM and other public health stakeholders still expect NetMark to align with their organizations to ensure good communications and coordination with the public sector.

Commercial Sector Partners

This eclectic group of for-profit businesses represents the formal partners for NetMark. Most were attracted to an association in which they could share risk, contribute to a credible and unified voice that could influence policy makers, and benefit from generic demand creation for ITNs. They also recognized the need to hedge against the volatile tender market, which would evaporate when donor funds shifted to other issues. From multi-national corporations (MNCs) to 25 small-to-medium-sized African enterprises (SMEs), the range of capabilities, relationships, objectives, and goals was broad. The smallest enterprises were severely under-appreciated at the start, but they have proven to be key players

in both the execution and economic development of the countries served by NetMark. NetMark's global public health and commercial partners found it difficult to differentiate between philanthropic and business strategies. In the former, a donation was only sustainable as long as the donor continued to give, whereas the latter was tied to the very profits generated by a business, which was sustainable as long as the business continued to profit. When commercial partners were asked why they were involved, one responded that it was inspired by the idea of using the market to solve big problems. Another added that the partnership gave it the license to think about issues of equity and access, instead of just profit.

Other Non-Governmental Organizations (NGOs)

AED has actively sought out partnerships with other NGOs and community-based organizations in its effort to serve the needs of diverse market segments. Some of these NGOs were competitors, contending for funding on malaria and other public health projects while partnering with NetMark. Most NGOs welcomed the opportunity to join forces; however, as with any disruptive innovation, some perceived the NetMark model as a threat to funding for social marketing and donor giveaway programs. The NGOs and multi-lateral agencies that have committed massive resources and time to these efforts as a public good remain skeptical of the NetMark model, despite the seemingly obvious need for both donor and commercial models to address this disease.

The Roll Back Malaria (RBM) Partnership

The RBM Partnership is a global initiative supported by more than 90 partners. Its aim is to halve the burden of malaria by 2010.[4] A key element of its malaria prevention strategy is to increase the use of ITNs among pregnant women and children less than five years of age from less than 10% in most countries to 60%, as stated in the Abuja Declaration of 2000, a commitment by 44 African countries to fight malaria using RBM strategies.[5] While RBM could draw attention to the need for ITNs and could mobilize resources, it did not have execution resources, and therefore found NetMark to be a useful vehicle for implementation of strategies to help achieve its goals. It was also critical for NetMark to work within the RBM framework to ensure alignment of its goals and strategies with those of national ministries of health and others in the malaria community. RBM's public health professionals, who were accustomed to indicators of success in the millions of units distributed rather than in the tens of thousands of units sold, found it

(L to R) NetMark billboard in Senegal, NetMark wall mural in Zambia, Former Senegal Minister of Health, Professor Awa-Marie Coll-Seck (now Executive Secretary of the RBM Partnership) at the NetMark launch in Dakar in August 2002

difficult to accept the commercial sector's view of success. In the opinion of one public health advisor, "The NetMark intervention [was] a failure." The ability to use public channels for distribution of free goods can be faster and less complicated for health authorities than trying to develop a market and long-term net supply. If NetMark had not acted as a buffer and advocate, one commercial partner doubted that it would have "wasted the energy to stay in the game," given what it perceived to be the unrealistic expectations of the public health community.

In summary, because of NetMark's mandate, a complex constellation of partnerships was formed to address the needs of numerous stakeholders and players. This effort required engagement and alignment with official public health programs and non-traditional players such as net/insecticide manufacturers and distributors, along with advertising and promotion agencies. Management of the dynamics among traditional public health players and commercial partners proved to be one of the greatest challenges for NetMark. Not only did they differ in objectives and goals, but also in their missions and cultures. Each spoke its own "language." And, as with any innovative operational model, all partners were "learning while doing." The appendix summarizes the partnerships in each of the seven countries where NetMark has full-blown programs (NetMark is providing limited support for a pilot project in Zimbabwe through Reckitt Benckiser), and in Cameroon, where the project hopes to expand in 2005.

Full Market Impact™ and the "4 Ps" of Business

While AED expected the NetMark project to be an experimental process of innovation—trying things out and keeping what works—team members knew that they needed to align their project design with the way business thought about the market and, at the same time, expand the traditional view of the market. A conscious effort was made, therefore, to align NetMark's design with the classic "4 Ps"—product, place, price, and promotion. The aim was to demonstrate how meeting the needs of the poor could translate into good business that promotes expansion into new market segments.

Gradually, over several years, a model has emerged that meets the needs of the various stakeholders. This model, dubbed "Full Market Impact™" (FMI™), encompasses five factors that can be addressed to achieve public health and business objectives through integrated strategies: supply, access, affordability, demand/appropriate use, and equity/sustainability. Private and public sector partners agree on common objectives while observing their respective roles across each of the five factors, which they would address even if they were working independently. AED helps to create a bridge of common objectives across related factors, providing technical assistance to public and commercial partners along the way and helping to leverage resources in a mutually beneficial manner.

AED hopes that FMI™ will challenge the way businesses think about market opportunity, encouraging them to take a broader view of the role their products can play and the consumer behaviors they can influence while addressing critical public health issues. Figure 1 depicts the AED/NetMark FMI™ model, including the points of convergence between the 4 Ps and the five factors of FMI™.

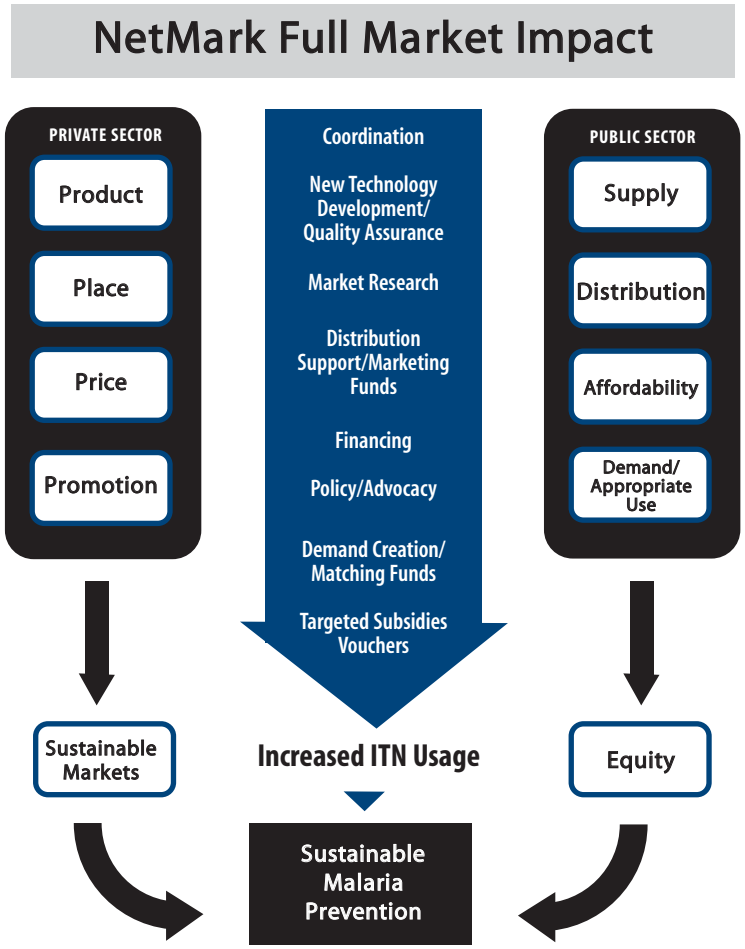


Figure 1: AED/NetMark Full Market Impact

Full Market Impact™ Results

Despite the reality that ITN sales by its formal commercial partners were only 62% of forecast in 2004,

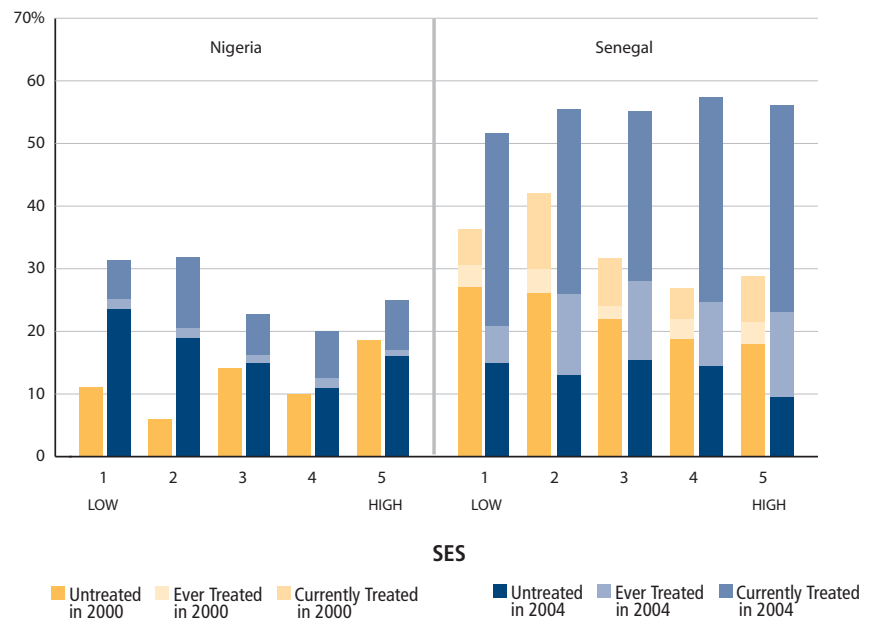
Sales staff for QCL, NetMark partner in Uganda, on ITN distribution motorcycles

NetMark has every reason to be optimistic. Sales by formal partners in 2004 were up 132% over those in 2003, and growth of the overall market in NetMark countries is estimated to have reached over 9 million in 2004. Moreover, demand creation has been successful in building awareness of ITNs. While the pacing of initial forecasts was overly ambitious and based on little more than guesswork, the past several quarters have shown a sharp increase in sales. Indications from recent market surveys are that the market has entered a growth phase, now that NetMark and its partners are solving supply and access issues, and many others are entering the market in response to demand that NetMark has generated for ITNs.

In a 2000 household survey, ITN use in Nigeria was found to be virtually non-existent; indeed, only 7% had even heard of treated nets.[6] In 2004, however, commercial players that benefit from NetMark-

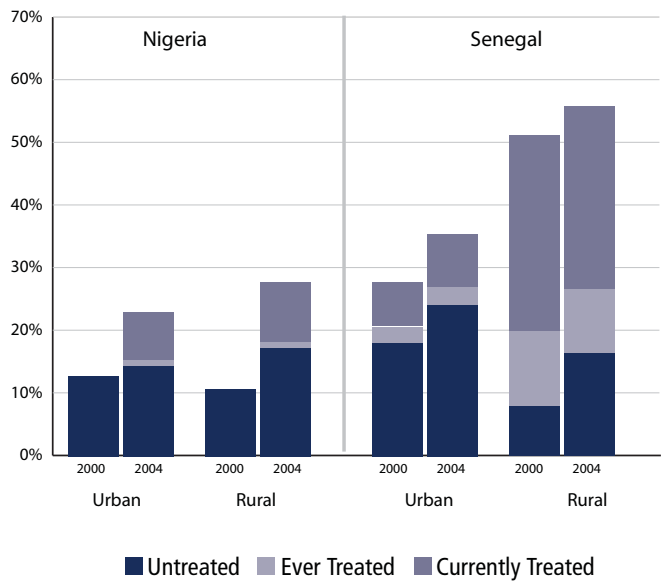
AED hopes that FMI™ will challenge the way businesses think about market opportunity, encouraging them to take a broader view of the role their products can play and the consumer behaviors they can influence while addressing critical public health issues.

Figure 2: Percent of Households that Owned a Net or Insecticide-Treated Net (ITN), by Socioeconomic Status (SES), Nigeria and Senegal, 2000, 2004



The socio-economic status (SES) scale was developed from a series of questions about ownership of assets, as well as measurement of other variables known to be associated with SES, such as level of education. Using statistical procedures (principal components analysis) to analyze the responses, each household was assigned a score. Households were then divided into quintiles based on this score.

Figure 3: Percent of Households that Owned a Net or Insecticide-Treated Net (ITN), Urban and Rural Areas, Nigeria and Senegal, 2000, 2004



NetMark provides matching funds to Reckitt Benckiser to develop their ITN brand in Zimbabwe

financed generic promotion sold more than 981,000 nets in Nigeria. There has also been a dramatic increase in the percentage of nets sold with re-treatment kits, and 37% of net owners reported that their net was treated, according to an Omnibus Consumer Study in October 2004.[7]

In addition, data from household surveys conducted by NetMark in 2004 show considerable gains since 2000.[8] Data from Nigeria and Senegal show that awareness and use of nets are increasing fairly dramatically and that more nets are being treated or purchased pre-treated. The percentage of households that owned a net or ITN in Nigeria, for example, rose from 12% in 2000 to 27% in 2004; in Senegal, the percentage of households that owned a net or ITN rose from 34% to 56%; and in Zambia, household ownership rose from 27% in 2000 to 50% in 2004.

Importantly, NetMark's commercial sector approach is resulting in increased use among ***all*** socioeconomic groups; that is, net coverage rates are very equitable and vulnerable groups are being reached in both urban and rural areas. Figures 2 and 3 show the percentage of households that owned a net or ITN in 2000 and 2004, by socio-economic status, followed by urban and rural areas, in Nigeria and Senegal. Equitability of net coverage is also evident in Ghana, where NetMark began operations in 2002.

NetMark's Experience with Full Market Impact™

Product (FMI™ Supply)

"NetMark is increasing the supply of ITNs by improving the coordination of commercial and institutional procurements, providing technical and financial support to expand manufacturing capacity and quality, and creating strong links between manufacturers and the best distributors in Africa. Increasing the supply of ITNs is necessary to meet the rapid increase in demand for ITNs (particularly long-lasting ITNs [LLINs]) among consumers and institutional buyers. NetMark is working closely with insecticide companies and net manufacturers to bring the most promising LLIN technologies from the laboratory to Africa as quickly as possible."[9]

For many years, the commercial sector had thought of itself as a supplier for public institutions, and some businesses had trouble shaking this self-perception. It took time for the commercial sector to fully realize that NetMark was helping to open up an entirely new consumer market—a classic "base-of-the-pyramid" marketplace completely off the sector's radar. As one partner commented, "At first I thought this was just another tender, like UNICEF or MOH, now I realize that the net is not sold until the lady puts it up in her house. NetMark has made me think about the consumer."

The MNC-to-SME supply partnership—in which high-quality products are linked to locally savvy distributors and their networks, and the business planning capacity of SMEs in the developing world is improved—is a potentially powerful new tool for the development community. One example is SiamDutch, an MNC based in Bangkok, Thailand, along with Palunet, a small for-profit business started in Senegal by Abdou Gueye in 2002. SiamDutch was already supplying one of NetMark's partners in Senegal with nets. However, they were eager to launch their own brand and teamed up with Palunet. NetMark was not convinced that this small company was worth investing in, and decided not to support Palunet until they proved their commitment and showed results. With support from SiamDutch and a total commitment to selling ITNs, and only ITNs, Palunet entered the market aggressively.

Palunet proved to be a capable player even without formal partnership status by riding on the momentum of the demand creation NetMark catalyzed. After 1.5 years, Palunet joined the partnership and gained access to technical, financial, and marketing support to build the Sentinelle™ brand.

Now, Palunet is expanding from Senegal into neighboring West African nations, with a financing guarantee supported by NetMark and SiamDutch. In this way, an MNC's willingness to invest in a long-term relationship has allowed an SME to grow the market while winning on both the economic and social fronts. NetMark provides business planning and reporting tools to improve Palunet's efficiency and professionalism. This SME especially appreciates the support that NetMark brings with its distributor meetings and interface with the Senegalese government bureaucracy, which can be difficult for a small business to negotiate.

Long-lasting ITNs (LLINs) represent the cutting edge in ITN technology. They are much more consumer-friendly in that they do not require re-treatment to remain effective. However, the supply of LLINs is currently limited to two manufacturers, and LLINs are generally more expensive. NetMark is investing in bringing new and less expensive technologies to the market by providing manufacturers with technical assistance from leading textile process engineers. NetMark is also working with African manufacturers to improve the quality of their net production through training in quality control. Without this financial and technical support, the supply of LLINs and the quality of many African-

made nets would continue to be an issue and competition would be minimized.

Product/Supply Lessons Learned

NetMark's willingness to reduce investment risk by sharing in research and development costs is helping to ensure that an adequate supply of high-quality products can be brought to the market by commercial players at affordable prices. In addition, transforming local partners from traders to marketers with improved business planning skills is a key to building a reliable supply. Overcoming the "trader mentality" of buying and selling whatever goods are available and in demand continues to be a big obstacle. NetMark found it needed to put increased resources into helping African partners adopt Western business practices such as development of a marketing strategy and plan for a single product line based on sales projections, stock procurement planning, and cash flow analysis.

Place (FMI™ Distribution)

"NetMark is working with suppliers and distributors to ensure the uninterrupted distribution of ITNs at a national scale through improved stock management, joint investment to expand the number of outlets carrying ITNs, partnerships with grassroots organizations for community-level distribution, and mobile promotional teams."[9]

The lynchpin players for place/distribution have become poorly capitalized SMEs with an entrepreneurial spirit and a willingness to become focused manufacturers and marketers of ITNs. However, expectations for large-scale public health outcomes cannot yet be met within the constraints of these small businesses. NetMark's recent effort to partner with NGOs has expanded product availability beyond purely commercial channels. Both sectors clearly have room to grow. It will continue to be a challenge to select the right partners, both in terms of financial strength and a commitment to focus their resources on ITNs.

Initially, NetMark chose distributor partners who represented other well-known international consumer packaged goods brands, but found that ITNs were not a priority for these large businesses, especially given the size and bulk of ITNs, which make them difficult to transport and stock. NetMark then included small businesses that were focused solely on ITNs and, as such, were more loyal and energetic market developers. These small businesses can neither survive massive un-targeted product giveaways nor bid on large tenders; as a result, the ongoing coordination of all ITN players remains critical. NetMark supports the free or subsidized distribution of ITNs to those who are unable to pay and promotes a market segmentation model that ensures that those subsidies are well-

targeted and allows the commercial sector to grow in market segments that do not need subsidies.

NetMark also encouraged international donors to include SMEs in their tender process, thus helping establish both retail and institutional (donor) markets for these businesses. Much progress has been made since a report from 2002 outlined problems:

> "Distributors and agents of NetMark's partners are responsible for placing orders. They remain hesitant to place large orders due to the threat of un-targeted subsidies; fear that new tax laws will not be respected and enforced by customs agents; [and] devaluation and high interest rates."[10]

One issue of concern to NetMark is to avoid creating a sense of dependency among SMEs that currently look to NetMark for access to affordable financing and as a remedy for their own weak planning. NetMark provides valuable technical assistance for business planning and recently began exploring financing options that can be managed by other sources such as commercial banks. NetMark is also initiating agreements with manufacturers to help them increase credit to their distributors through improved planning and partial payment guarantees that reduce their risk. For the past year, NetMark has provided matching funds to help distributors expand their distribution efforts, providing dollar-for-dollar investment based on approved marketing plans and submission of receipts and monthly sales reports.

Some distributors feel that NetMark's requirements are creating too much bureaucracy, while others feel these conditions have helped professionalize their business. As one regional NetMark manager put it, "We are putting first-world business planning tools in the hands of third-world businesses." Fine-tuning to create a useful process without becoming burdensome will require continued monitoring and feedback.

Place/Distribution Lessons Learned

NetMark is helping commercial partners improve their efficiency and lower the cost of building distribution capacity beyond urban markets for their branded products. Employing both traditional retailers and new channels, such as community-based and donor groups, these partners are building new markets while serving the needs of the poor.

Price (FMI™ Affordability)

"NetMark will continue to support the transfer of technology for LLIN production so that LLINs are available to individual and institutional buyers at the lowest possible cost. NetMark will continue to seek the elimination of taxes and tariffs in the countries where the project works and beyond by working in close coordination with local RBM partners."[9]

Taxes and tariffs are constant battles in which NetMark plays an important role in creating an enabling environment for its commercial partners. Having a non-profit advocate for lowering taxes and tariffs in the interest of the public good is more compelling to policy makers than speaking purely as a for-profit business. Disconnects between official proclamations to reduce taxes and tariffs and actual practices remain commonplace. NetMark explained the situation in Nigeria late in 2002:

> "The reinstatement of taxes and tariffs on imported ITNs and increase to a shocking 75% (three times the rate prior to the 2000 Abuja Declaration in which African heads of state agreed to reduce or eliminate taxes and tariffs on ITNs) have virtually halted sales of ITNs by our commercial partners within the country and crippled NetMark activities.
>
> "The Nigerian MOH has put great emphasis on the need to encourage local net production. Unfortunately, current net production is not sufficient to meet the needs of the commercial and

> public sectors. NetMark will work with both local and international partners in Nigeria to complement local production with international imports."[11]

That same year, the project also reported:

> "Even where taxes have been reduced or eliminated, there continue to be problems at the borders due to customs officials not being informed of changed policies."[10]

A direct correlation has been shown between a reduction in taxes and tariffs and increased ITN use in several countries. Lower barriers to entry and improved local quality have increased market competition and put a downward pressure on prices. For instance, in Zambia, one year after NetMark's launch in November 2001, retail prices decreased 30% due to increased competition and lower taxes and tariffs. In Uganda, sales more than doubled after the elimination of taxes and tariffs.

NetMark has also supported commercial partners with seed funding in the form of matching funds for initial product orders, support of promotional teams, and distribution expansion on a time-limited basis in order to support commercial partners and their local distributors. By supporting multiple partners in each market and attracting other players into the market by building overall demand, NetMark has further fostered a competitive environment in which prices continue to fall.

Price/Affordability Lessons Learned

NetMark's efforts to coordinate public sector initiatives, reduce taxes and tariffs, and make strategic time-limited investments are keys to lowering the barriers to entry for commercial players. In addition, NetMark's cost-sharing of consumer market research and demand creation helps create an attractive market into which commercial partners can deliver affordable products to serve this public health need.

Promotion (FMI™ Demand/Appropriate Use)

"NetMark builds demand for ITNs through marketing campaigns based on extensive behavioral research. This effort is amplified by joint investment with African distributors and ITN suppliers who market their own brands. As demand grows within a competitive market, consumers should benefit from improved quality, lower prices, and wider availability."[9]

NetMark partnered with two premier agencies to develop a world-class advertising and communication campaign with regional and country-specific components. AED's behavior change communication experts joined forces with Foote, Cone & Belding (FCB), a global advertising agency, and Exp Momentum, a pan-African consumer products promotion company. Together, these firms merged strategies and techniques to produce a successful advertising and promotional campaign. The campaign included mass media—TV and outdoor billboards, as well as traditional promotional and social marketing techniques such as road shows geared toward building awareness and behavior change. One TV spot won a prestigious international industry award for best "benefit communication."

In addition, NetMark created awareness for its "seal of quality" (Figure 4), which assured consumers that products carrying the seal met international standards, including use of WHO-recommended insecticides. Partners incorporated the seal into their packaging designs, which served to link their brand with the generic marketing campaign. Though the "lack of supply in the market prevents us from knowing our actual demand," as one team member stated, the tag line, "Mosquitoes KILL. KILL Mosquitoes" (Figure 5) has undoubtedly created awareness within the target markets. With adequate supply filtering into commercial channels, demand creation efforts should finally pay off. In 2005,

Figure 4. Seal of Quality

Figure 5. NetMark Poster

NetMark will launch a new pan-African campaign in which the seal of quality will be linked with the message, "ITNs are the new way for Africa to live."

Promotion/Demand Lessons Learned

NetMark's matching funds and public education campaigns built awareness about malaria and ITN use, enhancing the commercial sector's marketing efforts. Partners are leveraging NetMark's seal of quality on product packaging and piggy-backing generic demand creation funded by NetMark onto advertising and promotions for their commercial brands. A new hybrid communication capacity is developing in the African region. Partners can deliver a dual message, building consumer demand while creating behavior change in the interest of public health. Finally, while promotion is important, NetMark has learned the importance of balancing investment in supply- and demand-side activities.

Sustainable Markets (FMI™ Equity)

"NetMark works with commercial and public sector partners to ensure there is equal demand and access to ITNs across all socio-economic groups. NetMark uses targeted subsidies to provide discounted or free ITNs to the most vulnerable populations via the commercial sector. Over time the commercial sector will continue to increase its investment in the ITN market and grow a robust retail market, which will lead to long-term market viability and sustainability across all income groups."[9]

The sustainability of the ITN market is dependent on continued profitiability. NetMark's investment is intended to defray market development costs so that consumer prices can be kept as low as possible while allowing all participants in the value chain to earn normal margins. At the same time, businesses may consider making supplemental investments from their foundations or "social responsibility" budgets during the growth phase of markets in ways that relieve marketing or business managers from making decisions on whether to invest in ITNs or other health-related products within cross-sector partnerships based purely on profit and loss.

"'Mosquitoes KILL. KILL Mosquitoes,' has undoubtedly created awareness within the target markets."

Equity and profitability can be a challenge to balance, and early reports were populated with examples of untargeted distribution of subsidized ITNs, which discouraged the commercial sector from investing in market development. To address this issue, NetMark developed an innovative voucher program in partnership with national ministries of health, UNICEF, and ExxonMobil. Rather than assuming full managerial and financial responsibility for product procurement, storage, packaging, promotion, distribution, and management, donors provided the subsidy directly to high-risk populations in the form of discount vouchers distributed through antenatal clinics. Pregnant women would present vouchers at retail outlets to receive a discount. While NetMark focused on addressing the volume and quality of production and distribution of ITNs, ExxonMobil supported voucher redemption at Mobil Marts® and launched a cause-related promotional campaign, "Help Us Help," in which customer purchases of gasoline generated additional funds for the voucher program. This targeted subsidy program won on three fronts.

It enabled almost all of the donor money to go into the subsidy with a minimum amount spent on management, thus reaching more people; reduced the burden on health care workers so that they did not have to stock and sell ITNs themselves; and increased the number of retail outlets, particularly in areas that were not previously served by the commercial sector.

Balancing equity with sustainability has been successfully accomplished in Ghana, where purely commercial channels were used to reach target populations, including those in rural areas. Three distribution partners set up and supplied 668 retailer shops, including 101 Mobil Mart® gas stations, 45 of which were in regions participating in the voucher program. Two targeted subsidy programs have been linked to this distribution network, and results have shown that:

- In the Kumasi and Great Accra Regions, the ExxonMobil/USAID program distributed 75,000 vouchers to pregnant women with an 87% redemption rate.
- Mobil Marts® involved in the program reported two-thirds of ITNs were sold at full commercial prices.
- In the Volta Region, the ongoing British Department for International Development (DFID)/USAID program distributed 20,460 vouchers in 2004 and achieved a 51.4% redemption rate. In addition, the number of commercial outlets grew from 10 to 185 as a result of the voucher program in this region.
- Overall, vouchers are expanding the market, with close to 55,000 ITNs sold at full commercial prices in addition to 83,000 ITNs bought through vouchers.

These programs have been so successful that the Ghana Health Service (GHS) adopted the voucher approach to provide subsidies for the purchase of an additional 200,000 ITNs for children less than five years of age in the Central Region during a polio immunization campaign held in October 2004. The GHS is also working with NetMark and its partners to expand DFID programs in the Eastern Region in order to target 80,000 pregnant women, and to expand work with ExxonMobil in the Brong Ahafo Region in order to target 40,000 pregnant women.

Today in Ghana, NetMark is focused on increasing the use of insecticide re-treatment kits, especially among vulnerable populations in rural areas. Building on the successful voucher approach, NetMark is partnering with NGOs for the distribution of re-treatment kits to village-level community health workers. In addition, other governments in the region have begun to incorporate vouchers as a cost-effective and scalable method of intervention, emphasizing rural areas where few retail outlets exist.

Sustainable Markets/Equity Lessons Learned

NetMark's approach to shared investment risk is helping catalyze a new market in the interest of public health, one that the commercial sector would likely not have created alone. The competitive advantage of being the first to establish new brands in the minds of millions of new consumers may be a cost-effective business development strategy for these companies.

The Future of the FMI™ Model

The five factors of the FMI™ model—supply, access, affordability, demand/appropriate use, and sustainable markets/equity—have helped diverse partners build common ground with the 4 Ps of business, while expanding market opportunity. Over the next three years, the NetMark team believes it will achieve significant public health impact in malaria prevention. AED will continue to develop the FMI™ model to ensure that business and public health goals are met as the markets in which the model is applied evolve.

NetMark's Sustainable Development Achievements

Nearly six years into the NetMark project, the approach of building a sustainable ITN market through joint investment with the commercial sector is beginning to gain traction. NetMark's commercial sector partnerships have resulted in tremendous leveraging of donor resources, having lowered the cost per ITN delivered by 44.3% (from $7.65 to $4.26) since 2001. More than 30 formal commercial partners have invested approximately $18 million in building a sustainable ITN market in Africa as of December 30, 2004. For every dollar that USAID has invested in NetMark in 2004, formal commercial partners have invested $0.68. Figure 6 demonstrates the trend toward equal investment by NetMark and commercial partners. This is a conservative accounting for the overall impact that NetMark has had, since it does not include the massive investment made by informal partners and traders who have also been investing in building the market.

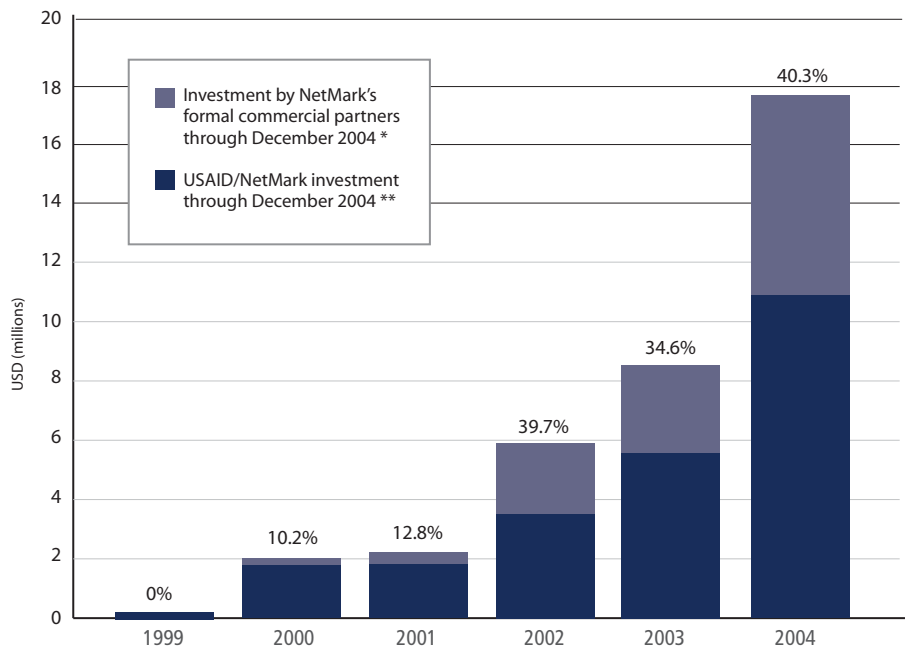
The NetMark project has shown that international and African companies are willing to invest in producing, marketing, and distributing ITNs when working in partnership with the public sector. This commercial investment is setting the stage for a sustainable ITN market. As one team member commented, "More of USAID's money can be spent on reaching the very poor and biologically vulnerable as the commercial sector is able to reach more and more of those who are willing and able to pay. NetMark is demonstrating the efficiency of letting each partner do what it does best."

By 2004, ITN sales by NetMark's formal partners neared the 2 million mark. While this represented only 62% of the ambitious projection total made by the various commercial partners for 2004, it did represent a 132% increase over 2003 sales. Progress is being made in a sustainable manner, and the market appears to be poised for rapid growth now that supply issues are being addressed. Overall commercial sales in NetMark countries may have exceeded 9 million based on reports from partners and estimates of additional sales based on market research conducted in 2004. The number of households from all socioeconomic groups in NetMark countries owning nets and ITNs is showing significant growth, even in rural areas, demonstrating that this model is capable of achieving business and public health objectives in a relatively short timeframe.

In addition, NetMark's approach to measuring total market impact more accurately reflects the shift occurring in the ITN market. In the words of one partner, and as similarly expressed by several others, "If NetMark were to go away tomorrow, most of the players would stay in the market. The commercial market has been created and would continue to exist." And in the highest form of flattery, targeted subsidies and market-based approaches are beginning to emerge from other NGOs and donor organizations.

Overall, the NetMark approach is expanding the reach of ITNs through both the market and donor channels. While the first few years have been difficult, it is quite typical for SMEs to see a market opportunity in advance of MNCs. SMEs begin to develop the market, paving the way for greater investment by MNCs in the future. Indeed, based upon the interest expressed by other MNCs, NetMark is beginning to inch toward a new stage of its evolution. It is yet to be seen what form these new partnerships will take, but partners have proven that there is synergy in pairing global know-how and influence with local African capacity in order to develop a new market and stimulate economic development.

Figure 6: Commercial Sector Investment as a Percentage of Public/Private Joint Investment Under NetMark, 1999-2004



*Commercial sector investment includes product procurement, marketing, distribution, vouchers, management, and product development. Total commercial sector investment resulting from NetMark activities far exceeds that which has been documented among its partners.

**USAID investment includes all NetMark expenditures to date for implementation, demand creation, campaign for re-treatments, policy, research, conferences, and program development.

Developments and Challenges

NetMark is making progress on several fronts. It is improving the quality of nets and the efficiency of production by providing technical assistance to African manufacturers in quality control, and by working with net and insecticide companies to develop new long-lasting technologies that can be made widely available. In this way, NetMark is building significant local capacity within the ITN industry while encouraging policy makers to gradually open up these protected sectors to competition from imports.

In addition, NetMark is beginning to monitor all ITN activity in the market—that is, the activity of informal partners and the broader ITN market in addition to that of formal partners. Previously, the focus was on its formal partners, but clearly, USAID's investment through NetMark (particularly through national-level ITN promotion and policy change) is having a much broader impact on the market, and this impact needs to be documented. It is felt that this monitoring will provide a better representation of total market impact by all participants.

On the supply side, Vestergaard's PermaNet®, the only long-lasting ITN (LLIN) in significant numbers in the market, will soon be joined by competitors. This change is expected to drive down LLIN prices to more affordable levels. The LLIN is the most desirable product, lasting up to four years or 20 washes, whereas other products need to be re-

treated after just three washes. Another LLIN, Olyset® (manufactured by Sumitomo and A-Z Textiles), has only been used through donor-funded distribution and has not yet been launched in commercial markets.

Due to the limited supply and high prices of LLINs, NetMark began to explore how a strategic investment in R&D might benefit consumers. Over the past year NetMark has worked with textile engineers from Anovotek, Bayer and SiamDutch/Tana Netting to develop a new mechanized process for the mass treatment of finished nets with long-lasting insecticides. The objective was to seek a less expensive, scalable and easily transferable process that minimizes environmental impact and exposure to insecticides among workers.

SiamDutch/Tana and Bayer agreed to work on the development of the new process, investing their own resources to cover all capital investments. NetMark provided technical assistance from Anovotek's textile engineers to develop the process to apply the insecticide formulation to the nets, with the understanding that it would be shared publicly with all interested African and international net manufacturers.

In September 2005, the first factory to utilize the new process was opened in Bangkok, Thailand. Two weeks later NetMark hosted an international meeting in Nairobi to unveil the process to all known African net manufacturers, insecticide manufacturers, and donors.

Although the testing of the product is not yet complete, preliminary laboratory results are very positive, and it is expected that LLINs using the new process will be available in 2006 under the Dawa Plus brand. SiamDutch/Tana hope to produce as many as 10 million LLINs per year in their new factory, and NetMark will provide technical assistance to other manufacturers that wish to invest in this new process.

Mary Carlin Yates, U.S. Ambassador to Ghana, visiting NetMark's voucher program

Packaged nets for sale

Furthermore, MNCs are investing in warehousing for regional stocks in Africa to eliminate the risk of stock-outs. Their vibrant relationships with SMEs may become a best practice for development, especially because of MNC incentives to build technical and business capacity with their local partners.

Developing the NetMark partnership has also produced some insights into the process of building a cross-sector partnership. The key lesson has been to manage expectations, ensuring time in the beginning to co-design a process of stages,

checkpoints, and measures of progress upon which everyone can agree, while defining roles and responsibilities and clarifying "language" issues. New commercial sector players are also approaching NetMark as the market begins to emerge.

NetMark will continue to adapt its approach as the lifecycle of the ITN market evolves. Dealing with the sheer number of competitive partners involved in the project is a challenge. NetMark may need to simplify the partnership in some manner and will need to gradually scale down its role as chief catalyst and facilitator as it works itself out of a job in 2007. NetMark has become closely associated with a group of AED employees who have struggled through the stages of team building and have evolved into a "performing" team. Now, the challenge will be to continue to manage organizational growth, including the ability to transition exiting and entering parties, and institutionalize NetMark's FMI™ model at AED.

As with any emerging market, the realities of economic, political, and social instability remain real, but this sector is likely to be no more, and perhaps less, volatile than other consumer markets. If public policy continues to support ITNs, if the marketing programs truly create a sustainable demand, and as the business partnerships become increasingly viable without NetMark's support, then the ITN market will continue to grow while serving the public health fight against malaria.

But ITNs are only a part of the prevention solution. As new players enter the market, NetMark's commercial partners will eventually have to compete not only with higher volume and better-quality ITNs, but also with other options for malaria prevention that may emerge over time. And so, the ITN market will have a lifecycle not unlike that of any other commercial market.

The Path Forward

NetMark partners have learned many lessons over the past six years. As with most matters worth learning, it has not always been easy. The key lessons presented here will help inform future partnerships, whether for malaria prevention or for tackling other public health or social problems. AED is already beginning to leverage its core competencies by applying the Full Market Impact™ (FMI™) model in hygiene and reproductive health partnerships. Capitalizing on its knowledge of behavior change communications and design and management of development programs, AED hopes to continue to partner with the commercial sector to grow new markets while addressing global public health issues and serving the needs of the poor.

AED NETMARK AND USAID PARTNERS

INTERNATIONAL ITN MANUFACTURERS:
A–Z TEXTILES, BASF, BAYER, HARVESTFIELD, MOSSNET KENYA, SIAMDUTCH, SUNFLAG/NIGERIA, SYNGENTA, VESTERGAARD FRANDSEN

REGIONAL COMMUNICATION PARTNERS:
FCB SOUTH AFRICA, EXP MOMENTUM

CAMEROON	ETHIOPIA	GHANA	MALI	NIGERIA	SENEGAL
POLICY AND PLANNING					
MOH PNLP	MOH	Ghana Health Service Regional HS	MOH PNLP	FMOH & SMOH	MOH PNLP
COMMUNICATION					
FCB/ EXP Momentum	Lion Advertising FCB/EXP Momentum	AdMedia FCB/ EXP Momentum	FCB/ EXP Momentum	Centrespread FCB/ EXP Momentum	FCB/ EXP Momentum
MANUFACTURING/DISTRIBUTION					
A–Z Textiles/ Polyflex	A–Z Textiles/ East African Group	Vestergaard/ Netco	SiamDutch/ Indusries Kulubali	Sunflag/ Harvestfield	SiamDutch/ Palunet
Syngenta/Jacovides	SiamDutch/ PETRAM	Vestergaard/ Transcol	Vestergaard/ Ets. Simpara	Bayer/CHI	Vestergaard/ Negitra
		Syngenta/ Reiss & Co.		Sunflag/Syngenta	Bayer/Senphyto
		SiamDutch, Bayer/Agrimat		Vestergaard	
		ExxonMobil		ROSIES Textiles	
TARGETED SUBSIDIES					
ExxonMobil		ExxonMobil	PSI & CARE	ExxonMobil	UNICEF
MOH PNLP		Ghana Health Services Regional HS	MOH PNLP	FMOH & SMOH	MOH PNLP

INTERNATIONAL PUBLIC SECTOR:
RBM, LSHTM, DFID, INTERNATIONAL FEDERATION OF THE RED CROSS, UNICEF, WORLD BANK, WHO, CARE, PSI

	UGANDA	ZAMBIA	ZIMBABWE
POLICY AND PLANNING	ITN Committee NMCP	NMCC CBOH	
COMMUNICATION	Limelight FCB/ EXP Momentum	FCB/ EXP Momentum	FCB/ EXP Momentum
MANUFACTURING/DISTRIBUTION	Vestergaard/ NetShoppe	A–Z Textiles/ Cropserve	Reckitt Benckiser
	SiamDutch, Bayer/QualityChemicals	Bayer/ Ecomed	
	Syngenta/ Twiga	Syngenta/ Melcome	
	Safinet	ExxonMobil	
	Sunflag/Coopers		
TARGETED SUBSIDIES		IFRC, UNICEF, ExxonMobil	
		CBOH/NMCC	

Legend:

CAD = *Consortium Africain de Droguerie*
CBOH = *Central Board of Health*
DFID = *Department for International Development*
FCB = *Foote, Cone & Belding*
FMOH = *Federal Ministry of Health*
HS = *Health Service*
IFRC = *International Federation of Red Cross and Red Crescent Societies*
ITN = *Insecticide-treated Bednet*
LSHTM = *London School of Hygiene and Tropical Medicine*
MOH = *Ministry of Health*
NMCC = *National Malaria Control Center*
NMCP = *National Malaria Control Programme*
PNLP = *Programme National de Lutte Contre le Paludisme*
PSI = *Population Services International*
RBM = *Roll Back Malaria*
SMOH = *State Ministry of Health*
UNICEF = *United Nations Children's Fund*
WHO = *World Health Organization*

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