

Scaling Reproductive and Maternal Health Technologies in Diverse Global Contexts Part 1: Understanding the Opportunity

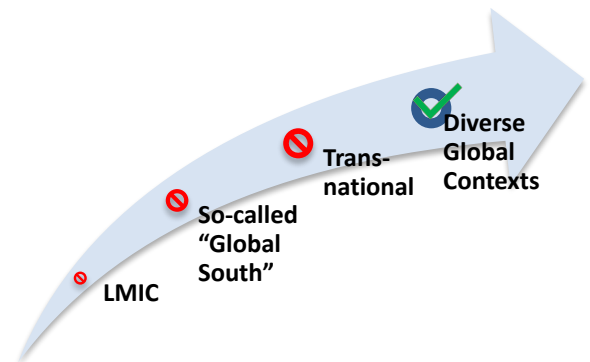
This document is a companion guide to the webinar “Scaling Reproductive and Maternal Health Technologies in Diverse Global Contexts, Part 1: Understanding the Opportunity”, hosted by [Rhia Ventures](#), [Propelevate](#), [Catalyst Global](#), and the [Coalition to Expand Contraceptive Access \(CECA\)](#) (June 2023). The recorded webinar will be available on our [website](#).

This guide will:

- Discuss gaps in reproductive and maternal health access and inequities across diverse global contexts.
- Provide an overview of the needs, inequities, opportunities, and the potential for generating revenue in diverse global markets.
- Explore strategies to engage community stakeholders when determining the applicability of a company’s solution in diverse global contexts.
- Highlight differences between global regions, with particular emphasis on the roles of international donors, government, and social marketing non governmental organizations.
- Discuss practical ways to estimate and segment global markets, including review of total addressable market (TAM), serviceable addressable market (SAM), and serviceable obtainable market (SOM).

Defining Diverse Global Contexts – Intentionality in Language Matters

- Terminology like low and middle income countries, Third World, the Global South, and developing countries implies inferiority and overgeneralizes diverse countries and populations, particularly non-white, previously (or still) colonized peoples.
- “Diverse global contexts” ensures we go beyond deficit frames and US or European-centric narratives.
- Research does not always use inclusive language so when describing communities in diverse global contexts, we will use terms that reflect the research conducted



Addressing Coercion in Diverse Global Contexts

- There is a well-documented history of coercion in global family planning programs
- Origins in the population control movement, shaped by racism, sexism, poverty, colonization
- Fertility reduction continues to motivate contemporary contraceptive interventions, innovations, and technology
- High-quality reproductive and maternal health care can transform people's lives, but any effort to expand access must guard against coercion
- Contemporary reproductive and maternal health efforts must take a person-centered, rights-based approach that centers autonomy and a holistic view of well-being

Opportunities to Advance Equity and Impact in Reproductive and Maternal Health

- Menstrual Health Management
 - 500 million (approx. 25% of all menstruating people) lack access to adequate menstrual products and / or facilities.¹
 - Satisfaction with current menstrual products ranges from 20% to 100% depending on the country.
- Ovarian Cancer
 - Eighth most commonly occurring cancer in women.
 - Country-specific mortality rates in diverse global contexts equate to thousands of excess deaths per year.²
- Contraception
 - 163 million women had unmet contraception need in 2019
 - Over half (56%) with an unmet need for contraception live in sub-Saharan Africa and South Asia.³
 - Contraceptive preferences differ by country.
- Maternal Mortality
 - In 2020, approx. 95% of all maternal deaths occurred in diverse global contexts.
 - Most maternal deaths could have been prevented.⁴

Global population trends: Understanding market and impact opportunities in reproductive and maternal health requires knowledge of the geographical distribution of target consumers, which are currently most populous in Asia, specifically women and other birthing people aged 15-49. However, due to the [African “Youth Bulge”](#), it is anticipated that within the coming years Africa will have an equivalent number of target consumers as Asia.

From Need to Desire – Who Decides?

- Engage with individuals on the ground to determine preferences, priorities and solutions.
 - Touch points may include: advocacy groups and coalition associations, or in-country researchers
 - These touch points can be excellent ways to engage health workers and target consumers in solution co-design.

Unique Features of Healthcare Systems in Diverse Global Contexts

- Greater Harmonization with the World Health Organization (WHO) compared to the United States.
 - Regulatory reliance and harmonization initiatives by the WHO are gaining popularity.
 - WHO-prequalified products have a streamlined registration process resulting in faster approval.
- International donors and non governmental organizations (NGOs), are making important decisions.
 - International donors and NGOs provide economies of scale and support for market entry.
- Widespread moves towards universal health care.
 - Potential for increased market demand and expanded care access.
- Decisions are rooted in available data, but without the direct voices of targeted groups.
 - Stronger voice of health workers and consumers in solution choice and design.
- Move towards decentralization of decision-making, oversight, and service delivery.
 - Solutions can be hyper-localized and to address regional or community-specific needs.

1) The World Bank.” [Menstrual Health and Hygiene Brief](#)”, May 12, 2022.

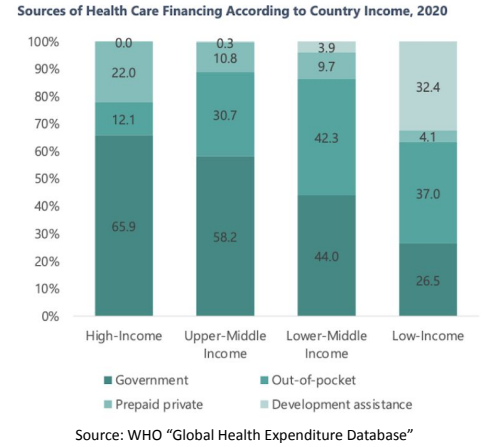
2) Ferlay et al., “[Global Cancer Observatory: Cancer Today](#)” International Agency for Research on Cancer. Accessed June 5, 2023.

3) Haakenstad et al., The Lancet. July 23, 2022.

4) WHO “Maternal Mortality Fact Sheet” February 2023

Roles of Donors, Government and Social Marketing NGOs

- Donors
 - May provide subsidies for products, services, infrastructure development, or market entry (e.g., training, awareness, etc.).
 - Can have a strong interest in both commercial partners and “public-private” partnerships.
- Government
 - Support may include payment for insurance or payment for the actual products/services.
 - Can serve as a centralized channel for new innovations.
- Social Marketing NGOs
 - Can engage communities to generate awareness, fund in-country research, and address barriers to care in their respective markets.

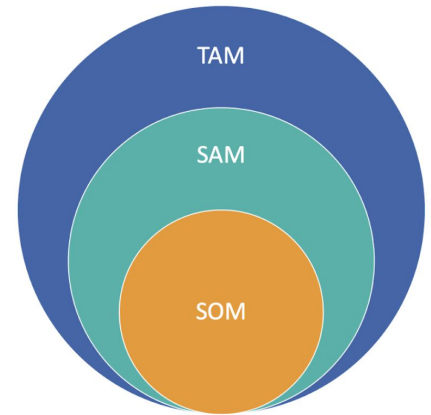


What Channels Provide Products and Services?

- Beyond commercial, subsidized commercial, and government channels, global market channels may include:
 - International networks of self-run or supported services that can be government subsidized.
 - Community health workers/mobile clinics
 - Emergency response plans
 - Innovative new delivery models fueled by COVID-19 and the move towards universal health care

Segmenting Global Markets

- Total Addressable Market (TAM)
 - The total market demand for a product or service.
 - This may be represented by the overall reproductive or maternal health demand in your chosen market.
- Serviceable Addressable Market (SAM)
 - Market demand based on acceptability of a given product or service.
 - This is primarily based on affordability or suitability.
- Serviceable Obtainable Market (SOM)
 - First time-horizon given available resources, competition, and market awareness.



Propelevate is a boutique consulting firm that supports changemakers working at the intersection of the private sector and social impact in diverse global contexts, with a strong focus on sexual and reproductive health and rights. They support investors and NGOs to identify and scope market and impact opportunities, and create and iterate strategy and business models.

Catalyst Global is a US-based 501(c)(3) committed to increasing access to critical sexual and reproductive health products and services in diverse global contexts. Catalyst works with a range of value-matched partners across the system – from laboratories and manufacturing plants to national authorities and service delivery partners – to bring innovations to the girls and women around the world who need them.

Coalition to Expand Contraceptive Access CECA is a convener of committed partners working to ensure access to contraception as part of a broader vision to achieve sexual and reproductive health equity for the U.S. CECA fosters collaboration, synthesizes evidence, creates policy change and expands access to care, and changes the conversation.

Rhia Ventures is a women-led nonprofit seeking to advance reproductive and maternal health equity by intentionally leveraging capital to center the needs, experiences, and perspectives of historically marginalized people in decision-making. The Rhia Ventures Ecosystem Building program supports early-stage reproductive and maternal health entrepreneurs and investors with building and growing in a way that incorporates a health equity lens and a culture of impact management and measurement.