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Palladium's Total Market Approach (TMA)

A pathway for delivering health impact

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The goal of Palladium's Total Market Approach (TMA) is to create greater health equity and impact from resources invested by all sectors. In emerging and developing countries, health markets and services are often fragmented and inefficient, which results in supply gaps, wasted resources, poor quality products and services, and inequities in access and cost.

Palladium's Total Market Approach is centered on helping countries achieve their priority health goals. Our approach begins by understanding health market dynamics and prioritizing the creation of an open, transparent, results-oriented engagement platform in which all actors can participate. This engagement is supported by data and evidence to inform market actions and to improve access and equity. We recognize that market dynamics are constantly evolving, including government health priorities, health market actors and actions, as well as consumer aspirations, ability-to-pay, and behaviors.

TMA is an intensive process, but one which can lead to significant results. The road to results includes improved coordination – understanding who is doing what and where; increased efficiency in resource utilization among all sectors, including the for-profit private sector; increased equity for underserved and difficult-to-reach groups; and increased use of quality health services and products. Ultimately, the goal is population-level health impact – including greater contraceptive prevalence, lower total fertility, reduced HIV infections, and others. These end results can take time, but each step along the road is essential in the journey.

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Our TMA Framework

The following six steps describe the flexible approach we undertake in a Total Market Approach.

1. **Analyze market dynamics at macro- and micro-levels.**
   We start with an in-depth market analysis to understand each country's health priorities and market dynamics. As a global leader in developing and applying data analysis tools, many of our policy and advocacy models support the TMA dialogue, including FamPlan, Goals, ImpactNow, and the Spectrum suite. Our market segmentation analysis uses multiple data sources to understand national, subnational, and micro-market segments. We incorporate key insights from the entire value chain of health products and services, including geographic access, consumer preferences, and purchasing decisions. In India, our in-depth analysis revealed important differences in access to and use of public and private sector services in rural areas at the district level, helping stakeholders to understand the existence of micro-market segments and comparative strengths among sectors. In Mali, our market segmentation analysis revealed an important niche for post-partum family planning and introduction of a minipill. Our history of using data models and other evidence tools to understand market inequities is a hallmark of family planning programs in many countries.

2. **Engage Key Stakeholders.**
   Effective TMA engages key stakeholders from public and private sectors in an ongoing, participatory dialogue that builds consensus. As a trusted global leader in policy and advocacy for more than 25 years, Palladium has successfully engaged senior-level stakeholders and decision makers from Ministries of Health and Finance, Social Security Institutes, and non-profit and for-profit sectors in more than 50 countries worldwide. We believe that effective engagement requires goal-oriented dialogue resulting in concrete action, for example securing government commitment to equity and targeting of resources to hard-to-reach and/or under-served populations, achieving the removal of regulatory barriers for the private sector, and strengthening mechanisms for public-private partnerships. Palladium is helping Ministries of Health establish technical working groups to analyze resource requirements and develop costed implementation plans in 16 countries, including intensive efforts in Uganda, Tanzania, Malawi, Ghana and Nigeria. These groups include public private and NGO stakeholders engaging to understand the FP landscape and coordinate actions, making them ideal platforms for TMA coordination.

3. **Understand Comparative Strengths Among Market Players.**
   Based on our market analysis, we seek to build understanding for the comparative strengths of each sector and stakeholder. Health markets are diverse and dynamic, and all sectors will have different advantages depending on health goals, target audiences, method mix, and geographic focus. We understand that players often have a strong, vested interest in the status quo, which makes for a complex consensus-building process that requires strong stewardship by governments and donors. In many countries, Palladium's legacy as a trusted policy and advocacy partner makes us well suited to play this role. In Uganda, Palladium supported convening of the RH/FP technical working group to break down barriers to sharing and understanding among different sectors, bringing a whole new level of implementation coordination based on their comparative strengths and shared interests.

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Palladium's Total Market Approach is driven by our more than 50 years of experience as a thought-leader advocating and working toward balanced, sustainable health systems and markets. This includes developing data analysis tools and models to inform national and global decision makers, improving health policies and the capacity of governments, private and NGO institutions to implement them, and pioneering new models for private sector engagement.

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4. **Strengthen Capacity of Local Stakeholders.**
With sustainability and stewardship in mind, Palladium builds the capacity of government and key stakeholders to understand TMA concepts and evidence-based practices, analyze country-level data and priorities, strengthen planning and accountability, and effectively engage NGO and private sectors. For the public sector, this often includes strengthening PPP units, regulatory reform, accreditation, and even strengthening private sector players. In the private sector, this includes building capacity and willingness to engage with government, advocate for rational regulation, and participate in data sharing to strengthen market monitoring. In Afghanistan, Palladium supports capacity development of the PPP unit at the Ministry of Health to strengthen its ability to design, manage, and monitor large-scale hospital PPPs—and more effectively engage with the private sector. Our approach is based on practical interventions—such as mentoring, training, learning-by-doing, and facilitation– that foster accountable and transparent stewardship, local ownership, skills transfer and capacity building for TMA at the country level.

5. **Support Total Market Interventions.**
Palladium supports a wide variety of market interventions, ranging from partnering with pharmaceutical industry to introducing new products, improving geographic access and affordability, establishing regional purchasing partnerships for small markets, introducing new technologies to strengthen distribution channels, implementing targeted demand generation strategies, and a wide range of financing mechanisms, such as vouchers, microcredit, and community insurance. In India, Palladium supports a multi-pronged approach to strengthen public and private channels, including collaborating with an e-commerce business partner to bring affordable FP products to private providers, facilitating accreditation and reimbursement for private providers through government-supported insurance schemes, and using village-level social entrepreneurs to expand distribution to small villages in rural areas in collaboration with fast-moving consumer goods companies.

6. **Re-engage and Re-assess.**
Achieving sustained health impact is an ongoing process that requires continuous reengagement of stakeholders and reassessment of market dynamics, entrance of new players, changes in policies and regulations. To further advance TMA dialogue at country- and global-levels, we believe that TMA metrics can be strengthened and market shifts monitored more closely. We are advocating for Total Market Monitoring and Measurement (TM3) to track market-wide shifts across sectors, method mix, products and services. In India, Palladium is using robust and timely monitoring of market trends to understand short-term and medium-term impacts of market dynamics, including government HMIS service delivery data, sales data from multiple NGO and commercial partners, GIS mapping, and retail audits. TM3 is an important part of the road-to-results—ensuring that market interventions are having their intended result, improving efficiency and equity in order to achieve/ health impact.

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