Sanitation Service Delivery

Catalyzing markets for urban sanitation in West Africa

COTE D’IVOIRE
GHANA
BENIN
SSD PROJECT VISION

The team envisions catalyzing the markets in the three target countries such that by the end of the five-year project there will be a thriving sanitation marketplace with increased capacity to deliver products and services to low-income consumers in a sustainable manner.
SSD GOALS

• 1 million increased use of improved sanitation
• 1 million increased use of safe disposal and/or reuse of fecal waste at scale
• Share learning on market-based approaches to the provision of sanitation services throughout West Africa
URBAN APPROACH

- Product and service design
- Test business models
- Demand and supply side financing
- Government partnership
1 Research Methodology

2 Country Presentations

• Research Findings (Market Opportunities/Failures)
• Priority Problems
• Interventions
Research Methodology
What gaps exist between people’s actual and desired sanitation experiences?

Where and how are products being manufactured, serviced and sold?

What are the key strengths and weaknesses of existing market actors?

What financing products are currently available in the marketplace?

Who manages FSM at the municipal level? How and by how much are they funded?
Research Methodology

**Analytical Framework**

Manufacturers → Importers → Distributors → Wholesalers → Providers → Consumers

**Production to Use Spectrum**

**Core**
- Price
- Place
- Promotion
- Product

**Support**
- Coordination
- Information

**Rules**
- Policy/Regulation
- Tax and tariffs
# Product and Financing Scan

<table>
<thead>
<tr>
<th>Technical lead</th>
<th>PATH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementers</td>
<td>PATH with assistance from PSI Country teams and others</td>
</tr>
<tr>
<td>Countries</td>
<td>Ghana, Cote d’Ivoire, Benin</td>
</tr>
</tbody>
</table>

- Characteristics of products on the market
- Technologies, manufacturing, logistics, partners
- Characteristics of finance products.
- Innovations, supply & demand, logistics, partners
# Market Landscaping

<table>
<thead>
<tr>
<th>Technical lead</th>
<th>PSI</th>
</tr>
</thead>
</table>
| Countries      | • Benin, Cote d’Ivoire: Full  
|                | • Ghana: Small Scale (Sept. 2015) |
| Implementers   | • Benin, Cote d’Ivoire: PSI Country teams with input and close coordination with PATH  
|                | • Ghana: PSI Consultant in collaboration with WASUP |
| Insights       | • CORE: Product, Price, Place, Promotion  
|                | • Supporting functions, Financing functions, Rules |
# Market Landscaping

<table>
<thead>
<tr>
<th></th>
<th>BENIN</th>
<th>COTE D’IVOIRE</th>
<th>GHANA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tenants</strong></td>
<td>16 Focus Groups</td>
<td>8 Focus Groups</td>
<td>40 Interviews</td>
</tr>
<tr>
<td><strong>Landlords</strong></td>
<td>21 Interviews</td>
<td>30 Interviews</td>
<td></td>
</tr>
<tr>
<td><strong>Value Chain</strong></td>
<td>17 Interviews</td>
<td>16 Interviews</td>
<td>12 Interviews</td>
</tr>
<tr>
<td><strong>Key informants</strong></td>
<td>12 Interviews</td>
<td>8 Meetings</td>
<td></td>
</tr>
</tbody>
</table>
COTE D’IVOIRE
1. Majority not satisfied with current toilet. Preference for modern and individual toilets, seated toilets that flush; some preference for squat in lower-income neighborhoods due to space and limited access to water.

2. Strong desire for emptying services that can fully empty toilets and respects cleanliness standards; most satisfied with “SODECI service”.

3. Well organized supply chains for input materials; widely available at local level. Few fluctuations in price.

4. Limited management capacity of entrepreneurs.

5. Credit is expensive. Commercial bank loans 10% - 20%, MFI 24%.

6. Across the board agreement that solid waste is priority for the city.
**Priority Problems**

1. Higher demand than supply in the Abidjan housing market contributes to increased rent above market rates when a property is upgraded

2. Government has limited capacity to oversee housing construction and landlords do not know about required standards

3. Few households use appropriate on-site containment owing to lack of affordable and easy to install options. Tenants and renters have insufficient information to evaluate quality

4. Vacuum truck operators have limited technical and business capacity; clients unsatisfied with service, value for money

5. No place for proper treatment or disposal of solid human waste in Abidjan
INTERVENTIONS

Build Business Capacity of VTOs

Landlord Certification

Treatment/Transfer Stations
BENIN
HIGHLIGHTS

1. Prefer vacuum trucks because seen as cleaner and take waste farther away. Although use manual when they need/want to fully empty. However, dissatisfaction when waste is disposed of directly in community.

2. Lack of regular maintenance/culture of pro-actively emptying of tanks.

3. No tradition of a vibrant private sector in Benin.

4. Businesses people don’t see sanitation as a business.


6. Low use of credit, limited desire to borrow.

7. Existence of toilet cleaning services.

8. Five different ministries oversee sanitation.
**Priority Problems**

1. High taxes hinder business growth.
2. There is a lack of quality, low-cost latrines and containment products on the market. Wide variety of products needed because of environmental factors.
3. Not enough “market aggregators” who can connect the pieces in the market, including products, distribution, and communication.
4. VTO association involved in price fixing
5. No treatment center – waste flowing directly into the ocean
INTERVENTIONS

Toilet Businesses

Combine VTO and Latrine Cleaning Services
GHANA
Highlights


2. Many companies indicated working partnerships in the past or present with government agencies or donor projects throughout Ghana.

3. International development partners spotlight sanitation issue and generate political will.

4. Businesses typically pass these additional costs onto their customers.
INTERVENTIONS

Compound Business Models

Technical Assistance on FSM