SCALING MARKET-BASED SANITATION
Desk Review on Market-Based Rural Sanitation Development Programs

Market-based Sanitation (MBS)
The development of a sanitation market in which the user makes a full or partial monetary contribution (with savings and/or cash equivalents) toward the purchase, construction, upgrade, and/or maintenance of a toilet from the private sector.
Few true market-based sanitation interventions have reached scale

<table>
<thead>
<tr>
<th>Reviewed Interventions</th>
<th>Sanitation-related Interventions</th>
<th>Single-country Interventions</th>
<th>Scaled to &gt;10,000 Toilets</th>
<th>Scaled to &gt;50,000 Toilets</th>
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</thead>
<tbody>
<tr>
<td>1,253</td>
<td>1,146</td>
<td>107</td>
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**Entries reviewed for WASHPaLS**

- 11 multi-country interventions across total of 43 countries
- Interventions that did not scale to provide 10,000 toilets
- Interventions were not truly market-based (government or community-based organizations played the role of product supplier)

**Note:** In the desk review we defined scale as more than 10,000 toilets sold as one criterion to identify interventions for case study with the premise that such interventions were successful in fostering market activity i.e., participation by more customers and entrepreneurs.
Time matters

Scale is important

We must consider the ecosystem
Time Matters:
If funders stay invested, interventions can scale up

Inter-annual trend of toilet sales for select MBS interventions

70-90% of toilets were sold in the second half of the interventions

Cumulative Number of Toilets Sold (‘000)

Year

Y1 Y2 Y3 Y4 Y5 Y6 Y7 Y8

SMSU Cambodia
Hands-Off SanMark Cambodia
PHA Benin
3Si India (Bihar)
Scale is Important:
Cost to scale varies across MBS interventions in different countries

Number of toilets sold vs. programmatic cost per toilet

Note: Programmatic cost per toilet as reported or estimated from program budget literature and toilets purchased; excludes the household’s expenditure on purchasing toilets or funds from other sources (e.g., government subsidy programs); the types of cost included in programmatic costs may differ by program due to variations in reporting methods.
We must consider the ecosystem:
Beyond market dynamics, system-level conditions are key to success
Time matters

Scale is important

We must consider the ecosystem
Where are we now?

Impact of **market rules** on the sanitation market
*Ghana, Uganda, India, Cambodia*

Critical questions about sanitation enterprises
*Nigeria, India, Cambodia*

- [https://www.globalwaters.org/resources/webinars/washpals/review-of-rural-mbs-programs](https://www.globalwaters.org/resources/webinars/washpals/review-of-rural-mbs-programs)
- [https://www.globalwaters.org/resources/webinars/washpals/designing-effective-sanitation-enterprises](https://www.globalwaters.org/resources/webinars/washpals/designing-effective-sanitation-enterprises)