



mHealth

GSMA mNutrition Initiative



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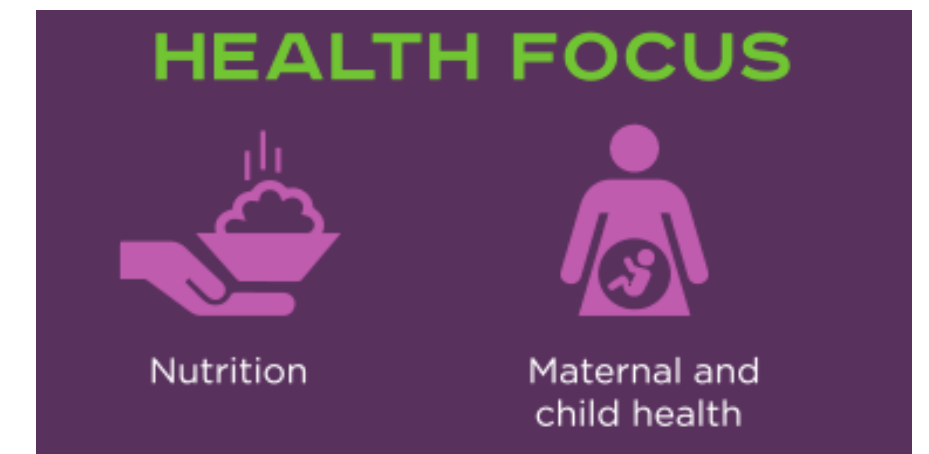
About the GSMA



GSMA Mobile for Development brings together our mobile operator members, the wider mobile industry and the development community to drive commercial mobile services for underserved people in emerging markets. We identify opportunities for social, economic and environmental impact and stimulate the development of scalable, life-enhancing mobile services.

Mobile is the predominant infrastructure in emerging markets. We believe it is the transformative technology that enables us to put relevant, impactful services into the hands of underserved people. Since the creation of GSMA Mobile for Development we have partnered with 50 mobile operators, rolling out 104 initiatives, impacting tens of millions of people across 49 countries.

GSMA Mobile for Development mHealth



In partnership with



The GSMA Mobile for Development mHealth programme currently operates the mNutrition Initiative in Sub-Saharan Africa

Supporting Millennium Development Goals 4, 5 and 6 and is closely aligned to the UN's Every Woman Every Child Initiative, Scaling Up Nutrition (SUN) and the Global Nutrition for Growth Compact

Funders



Research Partners



Content Consortium



Committed Partners



Nutrition: problem statement



Child Mortality

Every day more than **8,000 children die from preventable undernutrition** related causes. Nutrition is the single largest contributor to child mortality worldwide, underlying 3.1 million child deaths a year.

Stunting

36% of children in Africa under 5 are born with low birth weight and as a result of poor nutrition, become stunted. Getting the right nutrients at the right time is critical, particularly during the first 1000 days from pregnancy to the child's second birthday.

Global Productivity

Undernutrition is responsible for the loss of billions of dollars in productivity. It is estimated that **11% of GDP in Africa and Asia is lost to undernutrition** every year.

Good nutrition is a pre-requisite for physical, mental and social development.

mHealth: problem statement



Due to the ubiquity and reach of mobile services, mHealth is in a position to help alleviate many of the challenges in the health system.

However, individual direct integration of each mHealth service with different mobile players result in a proliferation of pilots, a fragmented market and a lack of scale.

This leads to disadvantages for:

Consumer	Government	Service provider	Mobile operator
<ul style="list-style-type: none">• Affordability of access• Poor user experience• Relevance and trust in content	<ul style="list-style-type: none">• Coordination difficulties• Frequent overlap of services• No scale• Lack of clear health and economic proof points	<ul style="list-style-type: none">• Resource and capital intensive• Silo approach to partnership• Lack of clear health and economic proof points	<ul style="list-style-type: none">• Resource intensive• Lack of scale• Medico-legal risk• Limited revenue growth• Limited leverage of mobile money and other platforms

GSMA program objective



The GSMA is working to address this fragmentation in 10 countries in Sub-Saharan Africa, with the eventual aim of providing **vulnerable pregnant women and women with children under the age of 5** with **free access to a suite of basic health and nutrition services**, delivered through a **single consolidated access point** on their mobile phones.

Consumer
<i>Women of reproductive age: include young women, pregnant women, lactating mothers</i>
<ul style="list-style-type: none">• Inclusion of nutrition• More sustainability through revenue• Trickle down to base of the pyramid

Focus countries:

Cote d'Ivoire Nigeria Ghana Rwanda Kenya Tanzania Malawi Uganda Mozambique Zambia



GSMA activities

- **Operator engagement** - brokering of commitments across mobile operators in Sub-Saharan Africa at both group and country level
- **Ecosystem engagement** – brokering of commitments from broader industry stakeholders
- **Content** – sourcing, development and localisation of content with local and global nutrition bodies
- **Product development and project management support**
- **Research** – qualitative and quantitative research on consumers, community health workers and mHealth services
- **Monitoring and Evaluation** – development of country-specific frameworks to measure outcomes and impact
- **Launch support** – technical assistance and activities to generate consumer interest



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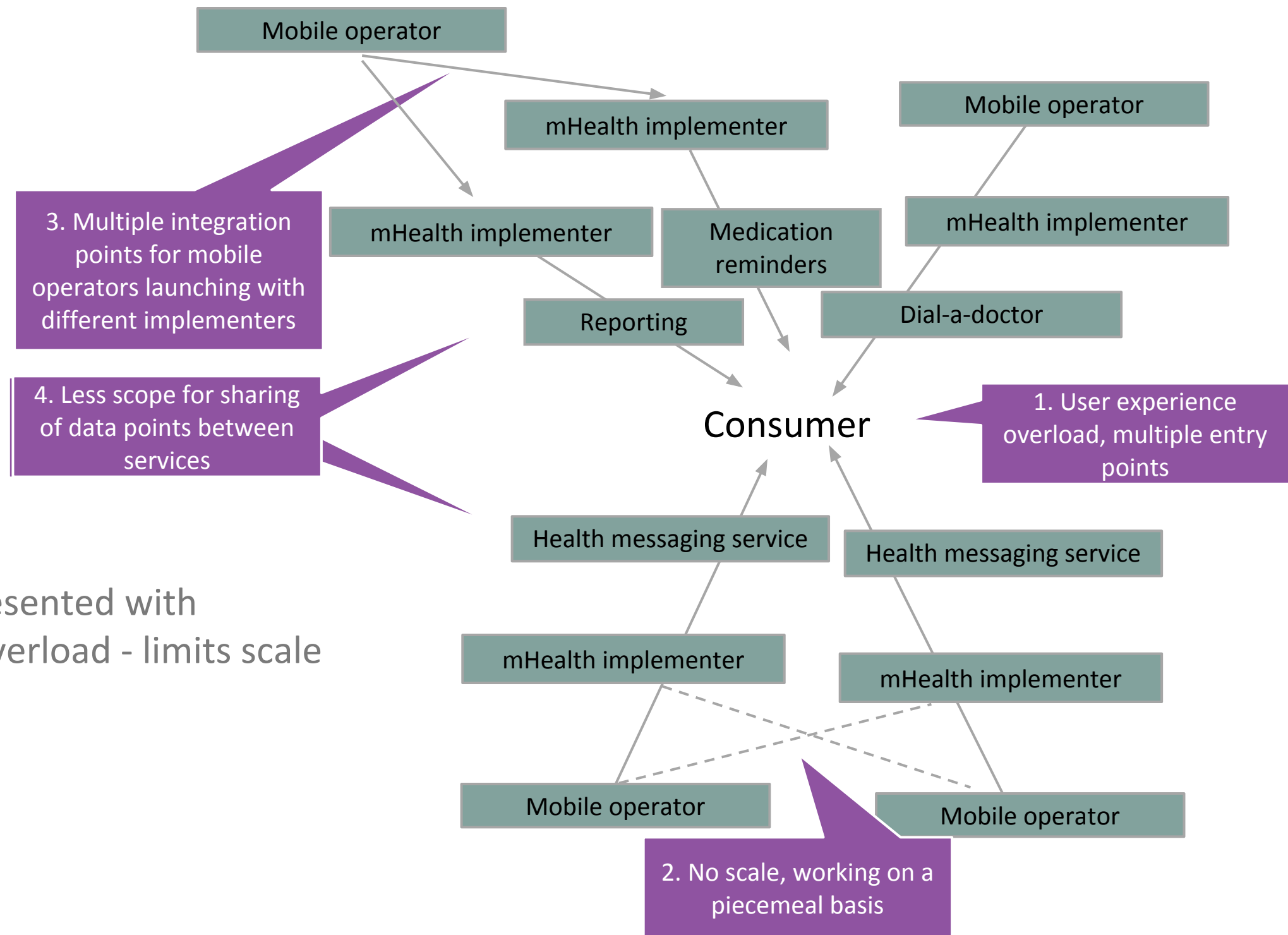
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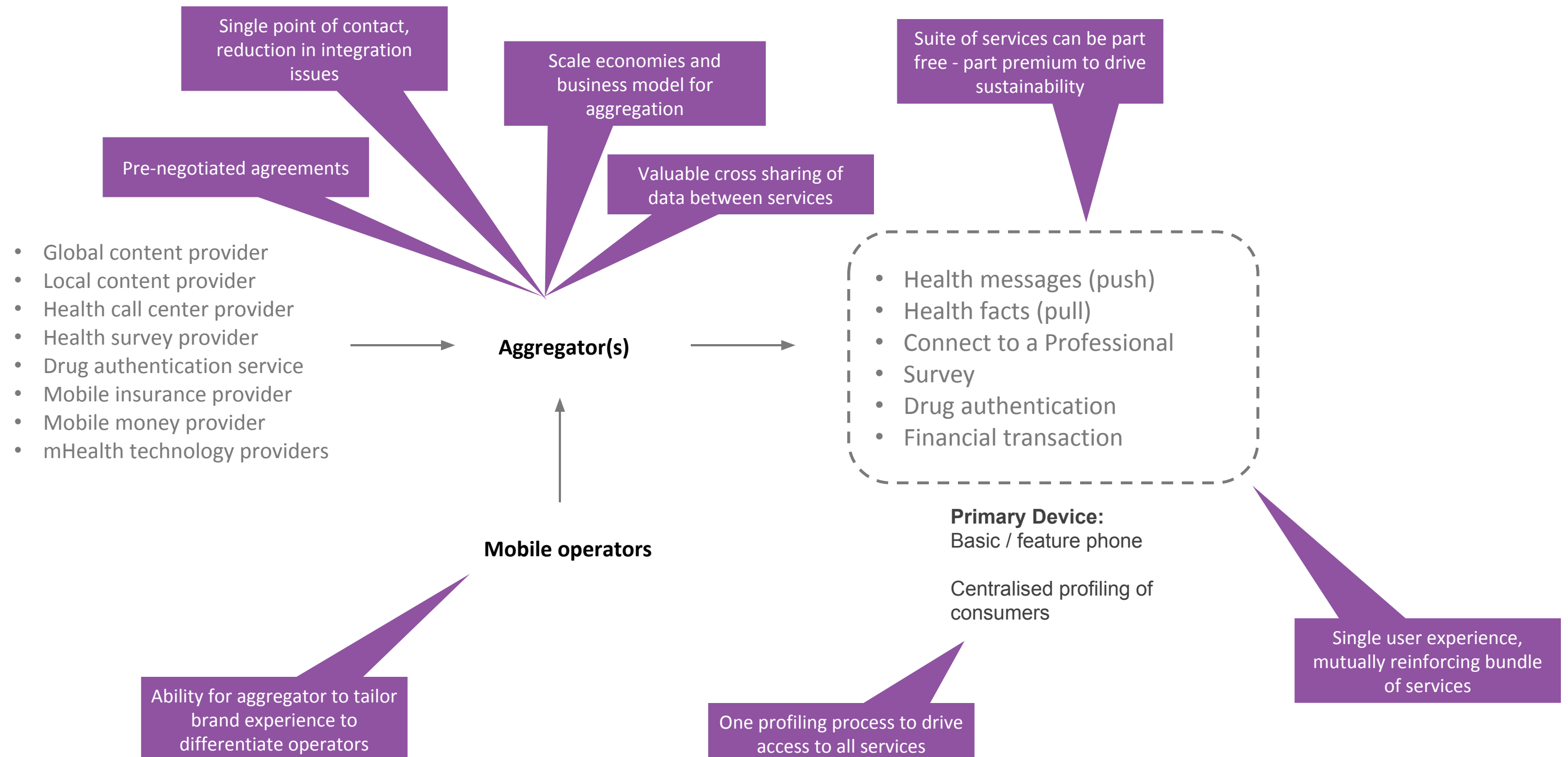
4. Program activities

Current state



Consumers are presented with mHealth service overload - limits scale and sustainability

Aggregation concept: consumers



Suite of consumer mHealth services*



Aggregating services provides value to consumers at all price points and use cases

- **Nutrition health service** – target users will be profiled and sent a package of relevant, stage-based messages on Nutrition (to be offered free)
- **General health content (push)** – users will be able to choose from a selection of health topics to subscribe to, which will then be pushed to them on a regular basis via SMS or other channels (to be offered on a freemium basis)
- **General health content (pull)** – users will be able to browse to specific health topics of interest on demand, when they have a specific interest area. This can include either information on health topics, or information regarding accessing health e.g. locations of clinics, health policies, etc. (to be offered on a freemium basis).
- **Connect to a Professional** – users will be able to connect to a healthcare professional who will be able to provide bespoke advice (to be offered on a freemium basis)
- **Mobile financial services** – users will be able to access mobile financial services, health related or otherwise (premium offering).

**This product concept will be interpreted in different ways in different countries to respond to local conditions*

Core target market



11.24m pregnant women and women with children under 5

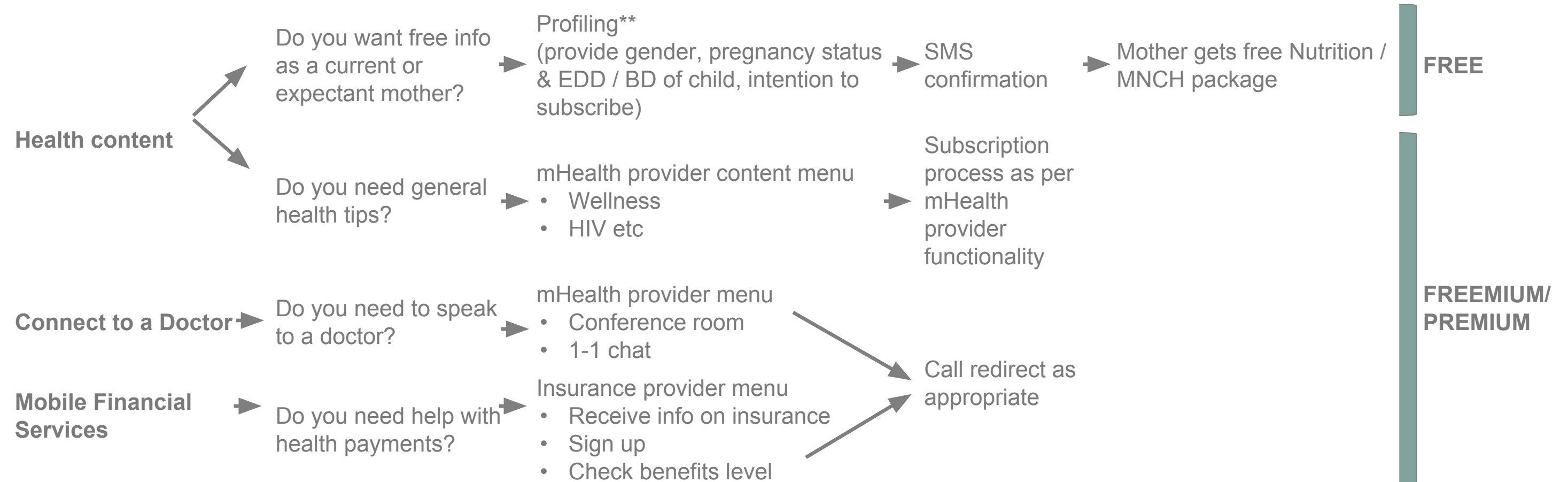
Cote D' Ivoire	Ghana	Kenya	Malawi	Mozambique	Nigeria	Rwanda	Tanzania	Uganda	Zambia
0.66M	1.18M	1.39M	0.33M	0.48M	3.80M	0.36M	1.43M	1.02M	0.59M

Source – WHO 2012, World Bank, GSMAi. Total number of pregnant women and mothers with children under five, adjusted for % of unique mobile subscribers, adjusted for % of literacy and adjusted for HIV prevalence.

Illustrative consumer user experience



Dial USSD* shortcode



Marketed by: **operator**

Branded: **at operators discretion**

Endorsement and awareness building by: **government** and **health partners**

Technical aggregator / VAS: **at operators discretion**

* USSD to start with, but depending on operator commitment and operational realities in country, might extend to SMS or IVR

** USSD to start with, but dependent on operator commitment and operational realities in country, might extend to Call Center-based profiling

Value to end consumer



- **Ease of access** to aggregated service through a single short code, instead of having to go through different access channels for different services
- **One-stop utility** to a consolidated access to a suite of mHealth services to address a number of health use cases as well as health areas
- **Trust and relevance.** Assured that the services provided have met with the approval of government authorities and that the health content complies to local as well as national guidelines.
- **Reach to base of pyramid.** Free access to a basic suite of health services to promote maximal reach to the base of pyramid (the Nutrition health service, as well as aspects of the other health services)
- **Long-term sustainability.** Access premium content, allowing service providers and mobile operators to continue subsidizing the free component of the service

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Partnership model



The success of this initiative in reducing fragmentation depends on bringing together a set of partners within the mHealth ecosystem, and securing commitments in exchange for potential benefits which are relevant to them.

The GSMA has already secured commitments from a number of partners.

Requested contribution



Mobile operator / Opco partner

Contribution:

- Free dedicated USSD & SMS short code (per opco) for mHealth services for consumers and health workers
- Free access to channels for basic profiling and subscription of services for pregnant women
- Embedding of localised and approved nutrition content
- Adoption of aggregated consumer health service concept
- Free and premium components within aggregated service, to drive premium up-sell (“freemium”)
- Marketing of subscription services to existing and new customers, to drive adoption

Tangible and intangible benefit:

- Enhanced demand for mHealth services through a customised user experience
- Enhanced demand for core mobile services (voice / data / text)
- Single point of commercial and technical integration for content and service providers through an aggregator
- PR opportunities to drive ecosystem uptake, brand equity and CSR – global, regional and national
- Increased access to existing and new target audiences (rural and underserved market)
- Cross marketing through integration of new and existing services on one platform
- Reduction in churn through aggregated user interface and increased value proposition
- Leverage of mobile financial services and other current offerings
- Broadcast channels for advertising

Partners already committed:



Requested contribution



Mobile content and health service provider

Contribution:

- Contextual, localised and validated content and services
- Ability to contribute to a freemium business model
- Technical and commercial integration with aggregators
- Commitment to update content on an ongoing basis where needed
- Sharing of service data
- Potential ability to replicate across numerous countries and other operators
- Collaboration with partners

Benefit:

- Increased reach of services through reduced cost of delivery
- Increased discoverability of service with direct embed on operators' mHealth menu
- Partnership with the operator's agreed aggregator(s) with pre-negotiated commercial and technical agreements
- New partnership opportunities with broader industry stakeholders

Partners already committed:



Requested contribution



Aggregator

Contribution:

- Technical and commercial integration with operators, aggregators and other stakeholders
- Integration with multiple health service partners
- Customized user experience by country
- Replicable model across numerous countries
- Sharing of data with GSMA, evaluation partner and health providers (principally Ministry of Health in each country)
- Strategic and operational commitments to mobile operators and end users

Benefit:

- Increased reach of product/service
- New partnership opportunities with the health industry
- Brand exposure and loyalty
- Maximizes the technical capabilities of existing platforms and services

Partners already committed:



Requested contribution



SIM and handset manufacturer

Contribution:

- Technical and commercial integration with operators, aggregators and other stakeholders
- Direct embed on SIM and/or handset menu
- Replicable model across numerous countries
- Sharing of data with GSMA, evaluation partner and health providers (principally Ministry of Health in each country)
- Strategic and operational commitments to mobile operators and end users
- Reduction in total cost of SIM / handset ownership – regional discount agreements (incl. distribution and after-sales services) to all qualified development sector partners

Benefit:

- Increased reach of product/service
- Pre-negotiated commercial and technical agreements with mobile operators through a single aggregator
- New partnership opportunities with the health industry
- Brand exposure and loyalty
- Maximizes the technical capabilities of existing hardware and SIM cards

Partners already committed:



Requested contribution



Government and relevant agency

Contribution:

- Endorsement of program and initiative
- Identification of priority nutrition indicators
- Adoption and consideration of new interventions
- Raising awareness at a national level

Benefit:

- Complement existing health campaigns via different mobile channels
- Increased distribution of health and nutrition knowledge in order to achieve behavioural change
- Alignment of the mobile ecosystem to national nutrition indicators
- Reduced capex and opex barriers to handset ownership and connectivity
- The starting point to building a secure a health registry of target populations
- Affordable and aggregated health worker services
- Innovative technologies for primary healthcare

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GSMA In-country engagement approach



mHealth

1. **Engage government and validate priorities** - engage early to align with government priorities
2. **Identify opportunity for mNutrition** - quick assessment in country to diagnose key issues / opportunity and identify stakeholders to work with (“country feasibility reports”)
3. **Conduct research** - in-depth research on services which have succeeded / failed, as well as on drivers of consumer demand
4. **Identify partner model** - identify “gives” and “gets” for key players in the mobile and health sector, in both public and private sector, for optimal collaboration
5. **Validate product concept framework** - develop a product concept framework within each country which responds to consumer needs, as well as to stakeholder “gives” and “gets”
6. **Secure commitments** - secure both in-country as well as regional commitments
7. **Develop M&E framework** - develop and adapt a measurement framework
8. **Develop sustainable business framework** - develop a business case for both public and private sector which provides for sustainability beyond the usual donor-driven mHealth model
9. **Support launch** - provide technical assistance before, during and after launch to optimize chances of success

Complementary activities supporting in-country engagement



1. Engage government and validate priorities
2. Identify opportunity for mNutrition
3. Conduct research
4. Identify partner model
5. Validate product concept
6. Secure commitments
7. Develop M&E framework
8. Develop sustainable business framework
9. Support launch

Regional business development: secure group-level commitments within mobile industry

mNutrition Content development: develop country-specific mobile content in Nutrition

Global and regional advocacy: share best practices and raise awareness of mNutrition



mHealth

Thank You

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<http://www.gsma.com/mobilefordevelopment/programmes/mhealth> Web URL