



# The Toilet Board Coalition

## Accelerating the business of sanitation for all







**For six years, the business of toilets and how people clean up their ‘business’ was my business. In my previous role at Unilever, I was responsible for the Domestos brand, our flagship toilet-cleaning product, sold around the world to people who have toilets in their homes and understand that keeping them hygienic is important.**

It's clear why toilets are interesting for me, but access to safe, clean toilets must be important to everyone, not just those of us that make their living from them. Inadequate sanitation has catastrophic impacts; the facts are stark and depressing. It causes death, disease and indignity. A child dies every 20 seconds from illnesses related to unhygienic sanitation. 443 million school days are lost every year to diarrhoea caused by inadequate access to clean water, sanitation and hygiene. Lack of sanitation also holds back economic growth. The World Bank estimates poor sanitation costs billions of Euros to many countries, amounting to the equivalent of 1.3% of GDP in Vietnam, 1.6% of GDP in Ghana, 6.4% of GDP in India, and 7.2% of GDP in Cambodia annually.

In 2014 I helped to launch the Toilet Board Coalition as its inaugural Chairman, leading a group of committed individuals from multinational businesses, NGOs, intergovernmental organisations, government agencies, academia and public utilities. Every member of our coalition has different backgrounds and skills, but we all share two things: a determination to develop innovative solutions to the sanitation crisis and an unequivocal belief that there is a clear role for businesses to play in creating these and taking them to scale.

Achieving scale is key. There are 2.4 billion people in the world who don't have access to adequate sanitation. The potential, both in terms of commercial and social impact, is colossal. This is a huge market opportunity and working out how to capitalise on it will result in sustainable, business-led solutions, which can make incomparable gains in public health.

The time is right for such an intervention. Our approach is aligned with the UN's Sustainable Development Goals, launched in September, which constitute the agenda for global development up to 2030. The Toilet Board Coalition is contributing directly to Goal 6: Ensuring availability and sustainable management of water and sanitation for all, by applying the principles of Goal 17: Strengthen the means of implementation and revitalise the global partnership for sustainable development, with an emphasis on market-based solutions.

I can't pretend that the Toilet Board Coalition has the answer to the sanitation crisis, but I do know that it is adding something new, different and necessary. Working with some of the best in this space, I can see how we can make a lasting impact. We hope others will find inspiration in the coalition's initiatives, see the potential of market-based sanitation solutions for commercial and social gain, and join us in our mission to help the 2.4 billion people who don't have access to safe sanitation.

From an organisational perspective, this coalition has opened my eyes to the value of intelligent, inspiring people working together. Of course, it hasn't all been fun and games – we have published our “lessons learned” in the publication, *Creating Alliances to Accelerate Commercially Viable Sanitation* – which details many of the challenges we have faced together over the past 12 months, some of which we have overcome and some of which we are still working on. For all the challenges, we are all still at the table with even more determination to make this work.

Equipped with our learnings, at the end of 2015 the TBC committed to investing even more into accelerating the business of sanitation delivery and resilient systems change. At the TBC we are developing a business approach to sanitation solutions and aspirational toilet experiences for all, under some of the most difficult conditions.

Thank you to everyone who has been involved in the story of the Toilet Board Coalition so far, from the Steering Committee and Partnership Council members to all the experts, academics, partners and agencies who have lent their knowledge and skills to help us experience that rare privilege of “being the change we want to see”. We are just getting started!



Jean-Laurent Ingles,

Founding Chairman of the Toilet Board Coalition,  
General Manager, Vietnam, Unilever

19 November 2015

## The global sanitation crisis

Poor sanitation remains one of our planet's greatest challenges. 2.4 billion people do not have access to a safe toilet. Almost one billion of these practice open defecation. The consequences range from public health to nutrition, loss of dignity, gender inequality, education, water quality, and broader economic development. Government action and traditional philanthropy cannot solve the problem alone. The global sanitation community has been resounding in their call for increased private sector engagement. Innovative business models are starting to emerge that aim to improve access to sanitation through the market. In many sectors business approaches have enabled speed and scale by attracting commercial investments and catalysing robust private sector engagement. They offer products and services that people are willing to pay for; focusing on aspirations over needs. A business sector delivering sanitation to low-income markets has remained nascent however, with pioneering business models remaining small scale and unprofitable.

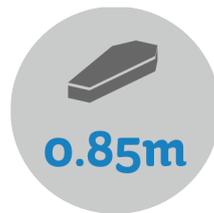
### The problem to solve



Approximately 2.4 billion people live without improved sanitation, of which almost 1 billion people continue to defecate in the open.



Sanitation remains a neglected issue with financial investments representing only 1/5 of the total water, sanitation and hygiene sector expenditure.



Diarrhoeal diseases are the second leading cause of child deaths in the world. Every year 0.85 million children die from diarrhoea. 88% of these deaths are caused by poor sanitation and unimproved water.



1 in 3 women worldwide risk shame, disease, harassment and even attack because they have nowhere safe to go to the toilet.

### Number of people without access to sanitation globally

Source: WHO/UNICEF Joint Monitoring Programme for Water Supply and Sanitation



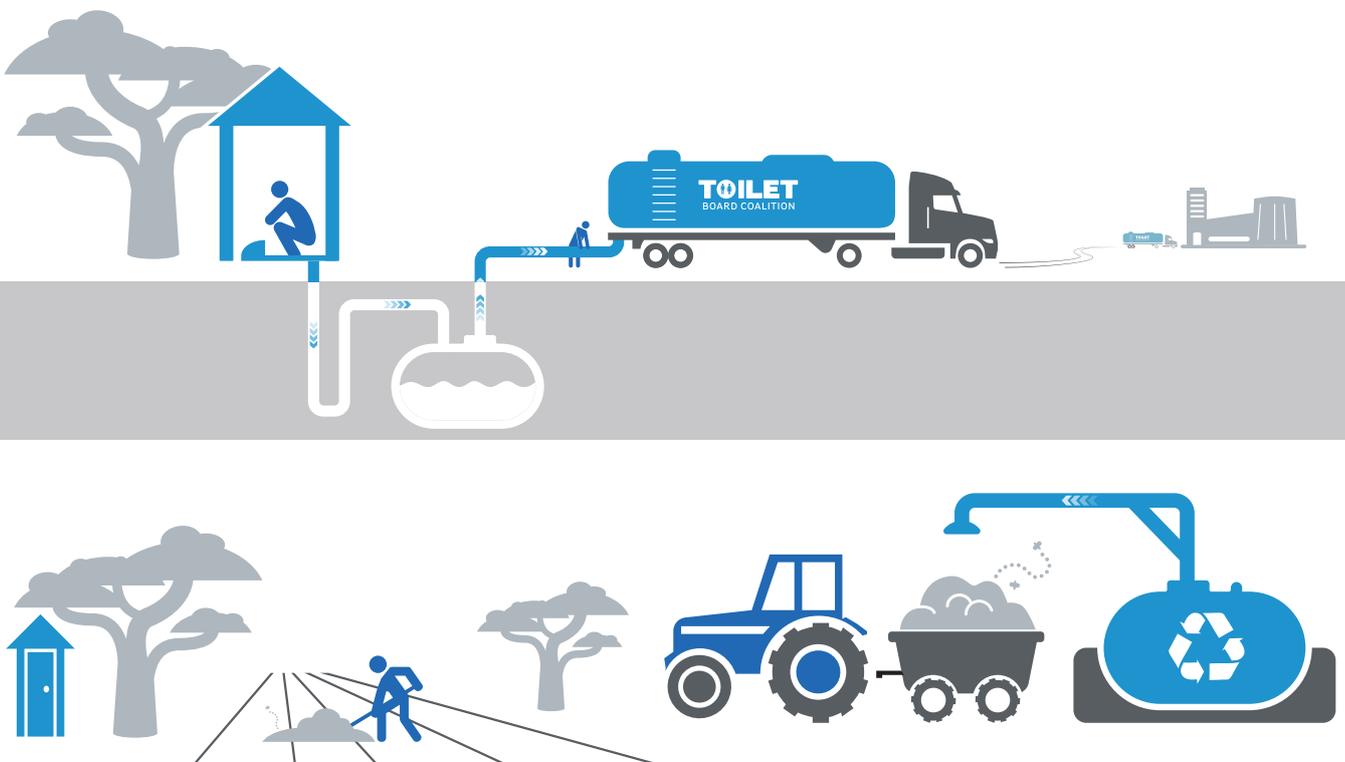
## Toilets for 2.4 billion - The business opportunity of the decade

We are at a decisive time for the global development agenda. September 2015 saw the launch of the Sustainable Development Goals (SDGs), which will require a doubling of efforts to achieve SDG 6, universal access to sanitation and water by 2030, according to the WHO/UNICEF JMP for Water Supply and Sanitation. New approaches to delivering sanitation to low income consumers at affordable prices will be integral to achieving this.

We believe that the private sector has an essential role to play, to refine models, bring new technologies, expertise, assets, and investment. This presents vast opportunities: opening new markets for hardware, consumables and services; exploring new business models; leveraging collaboration to drive innovation, and motivating employees around a social cause. We have all of the tools, we now need to accelerate solutions.

The complexity of the sanitation value chain and the diversity of expertise required also calls for collaboration: professional marketers to drive toilet adoption and usage, toilet makers and other hardware manufacturers to design and manufacture appropriate technologies, organisations with far-reaching geographical presence and efficient supply chains to deliver products and services in the field, utilities or waste treatment specialists to manage the safe disposal of the waste and circular economy approaches to utilising human waste as a resource.

The Toilet Board Coalition was created to bring a business view, approach and new solutions to the global sanitation crisis and aims to bring speed and scale to achieve universal access to sanitation before 2030. Our goal is to catalyze a robust business sector delivering sanitation to low-income markets, profitably and at scale, changing lives. We seek to work with leaders from business, governments, investment and civil society to drive resilient change at the system level. We are hoping to attract and empower more Toilet Innovators and SaniPreneurs to this vast business opportunity with our commitment to support, mentor and invest through our Toilet Accelerator Program. The Coalition brings experts from business, investment, and the global sanitation community to cross-fertilise experiences, and innovate at all levels, to catalyse the growth of profitable sanitation businesses to deliver sanitation to all.



## About the Toilet Board Coalition (TBC)

The TBC is a business led coalition. We share a joint-vision and are committed to providing the necessary leadership, mentorship and investment needed to accelerate the pace of change to achieve universal access to aspirational toilet experiences.

We work at the systems level to co-create the necessary ecosystem to support sanitation businesses to scale. And, we work directly with promising businesses in emerging and frontier markets that have the potential to deliver sustainable and resilient sanitation at scale.

We have created a platform for global business leaders to join the global sanitation community in a public-private partnership with the aim to accelerate the delivery of universal access to sanitation.

- We are catalysing a robust business sector to help to deliver sanitation profitably with speed, at scale, and accessible to all.
- We are investing in business and technical capacity building for promising business models along the complete sanitation value chain, in emerging and frontier markets - providing access to capital, and hands on corporate mentorship.
- We are bringing global marketing power to raise awareness of the crisis and to present business solutions that meet the needs of people today and satisfy our aspirations for the future

## The Power of Partnership

### Why a business led public-private coalition for sanitation?

Multinational businesses are experts at delivering complex systems with speed and scale. Promising sanitation business models need access to capital and skills building to grow, and development experts understand the most urgent priorities for sanitation delivery in under served markets. The TBC is a business-led public private partnership that brings all of these pieces together, innovating at all levels, to drive change.

Leadership is required at the systems level to drive change with speed and at scale. The TBC's unique partnership has assembled global leaders to fill this gap, providing the business view, and a platform to work in partnership with societal leaders to break through current barriers to achieving universal access to sanitation.



**OUR GOAL:** to catalyse a robust business sector to deliver universal access to sanitation.



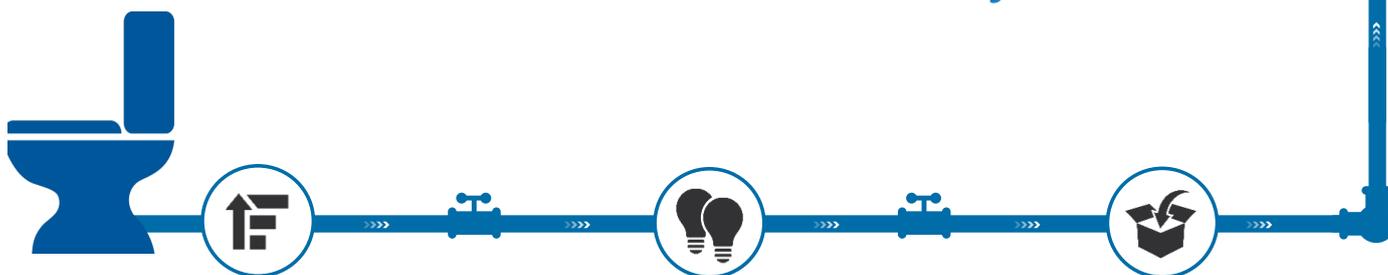
**OUR MISSION:** to accelerate innovative business solutions that deliver sanitation at scale – to those who need it most – by innovating at the social, economic and organisational levels.

## The Toilet Accelerator

In January 2016 we have launched a corporate accelerator program to facilitate private sector engagement and mentorship to sanitation businesses and entrepreneurs serving low-income markets. The Toilet Accelerator works with promising sanitation business models that have the potential to overcome current barriers to access, use and adherence at scale. More than toilets alone, we are supporting commercially viable businesses at every point in the sanitation value chain.

We focus on commercial viability, de-risking and scale. We take a human centred design approach: test all ideas; don't be afraid to fail; build on learnings to get to a viable solution. We insist on commercial rigor, leveraging deep understanding of consumer insights, social & environmental issues, and commercial investment analysis.

### The Toilet Accelerator works with sanitation businesses in three ways:



#### Accelerating

Identifying promising sanitation business models with prospect for scale – and matching expert mentors from across the TBC membership to address critical business issues to ensure access to capital and partnerships for scale.

#### Co-innovating

Co-innovating new solutions where critical components of the system do not exist, i.e. leveraging the innovation & R&D departments of our sophisticated TBC member companies to solve business and technology issues.

#### Bundling

Identifying opportunities to bundle sanitation to other solutions also targeting the same users, i.e. affordable housing, water, energy, and mobile for development.

## Our criteria

The Toilet Accelerator is seeking to work with businesses that meet the following criteria:



### Market-based:

Commercially viable businesses, at every point in the sanitation value chain, delivering sanitation to those without access, profitably.



### Innovative/Replicable:

Product offering that is aspirational for its target market and provides an improved solution to the market. AND / OR Product offering that is proven and replicable.



### Scalable:

The business is positioned to deliver sanitation at scale and is connected to the full value chain of sanitation service delivery.

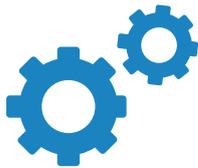


### Emerging & Frontier Markets:

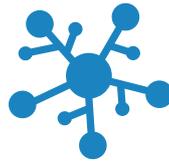
Target market includes populations most at risk in Asia and Africa.

## Benefits

The TBC Toilet Accelerator offers sanitation businesses:



6-12 months of **in-kind business support** and **hands-on mentoring** tailored to your needs and the challenges facing your business.



**Access to global and local mentors:** business experts from leading multinational companies - sales, marketing, supply-chain, financial planning, etc and technical experts from leading companies and stakeholders - research&development, engineering, IT, mobile, etc



**A business intelligence & experiential learnings:** consumer insights study; social & environmental audit; financial analysis



**Partnership brokering & brand building** through affiliation with TBC member corporate, NGO and institutional brands

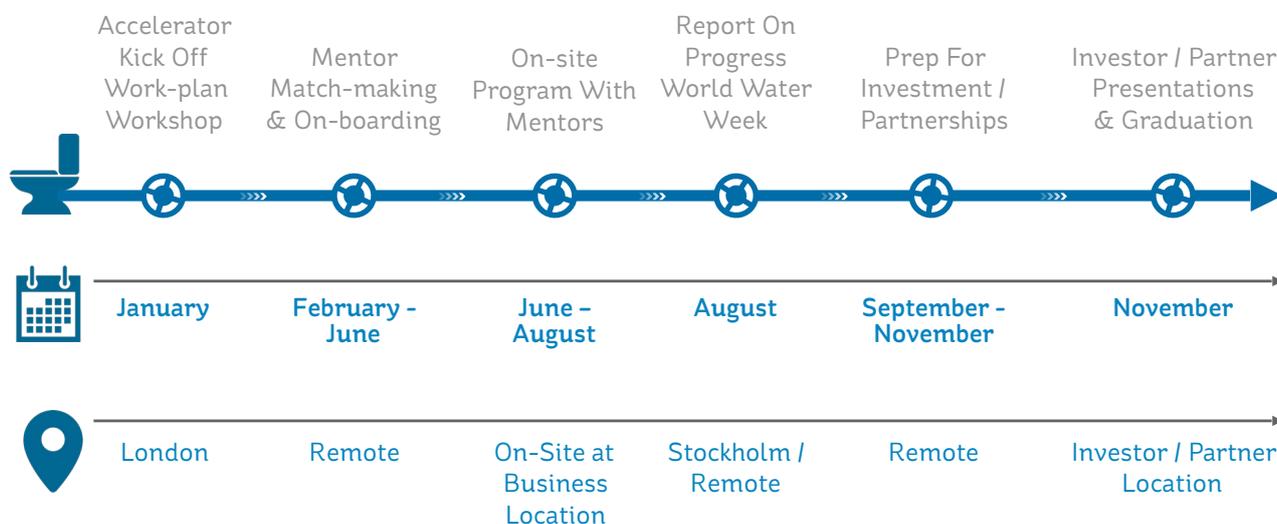


**Access to capital** upon graduation from the Toilet Accelerator (Capital from TBC members and TBC investor network based on investment readiness)



**Membership to Toilet Entrepreneur Country,** a global peer-to-peer network of sanitation business entrepreneurs and Alumni of the Toilet Accelerator Program

## 12 month Annual Program



## Selection process

### Toilet Accelerator Selection Process

- 1** The Toilet Board Coalition reviews all applications and selects a short list of promising sanitation businesses.
- 2** Applicant businesses selected for the short list are asked for an interview.
- 3** Final selection of potential businesses submitted to the Toilet Board.
- 4** The Toilet Board confirms up to 6 businesses for a Feasibility Cohort and up to 6 businesses for an Accelerator Cohort.
- 5** The Feasibility Cohort businesses are supported with a 3-6 month program with Toilet Board Coalition experts to define the optimal areas for TBC & Toilet Accelerator support
- 6** The Accelerator cohort is selected from the Feasibility Cohort or directly from the application process.

**We can't wait**

**Delivering sanitation at scale requires innovative sustainable & resilient solutions**



## Our Inaugural Toilet Accelerator Cohort 2016

### CLEAN TEAM GHANA



**Model:** Product to service model. Monthly fee for toilet servicing, including the rental of toilet unit and waste collection three times per week. Waste is disposed at the municipal treatment centre.

**Lead:** WSUP

**Date of creation:** 2012

**Status:** 1,000 toilets – Scale up

**TBC Mentor Chair:** Charlie Beevor, Unilever (TBC SteerCo)

**Other TBC members involved:** WSUP, SFF, DFID, Unilever, Firmenich

### LAGUNA WATER PHILIPPINES



**Model:** Bundling of services to the same consumers (Water & Sanitation). Model enabled by efficiencies gained with cross-subsidies between higher income consumer segment (85% of households) and last mile water service network (15% of households), charged as top up on water bills.

**Lead:** Manila Water

**Date of creation:** 2014

**Status:** Pilot

**TBC Mentor Chair:** Perry Rivera, Manila Water (TBC SteerCo)

**Other TBC members involved:** Manila Water, LIXIL, Unilever, ADB

### SVADHA INDIA



**Model:** Svadha identifies, trains, supports local entrepreneurs that manufacture latrine components, commercialise them and ensure installation and after-sales

**Lead:** eKutir

**Date of creation:** 2013

**Status:** 10,000+ toilets – Scale up

**TBC Mentor Chair:** Mauricio Troncoso, Kimberly-Clark (TBC Director & SteerCo)

**Other TBC members involved:**

Kimberly-Clark, Unilever, Grand Challenges Canada, Firmenich



### Lixil HOUSEHOLD PORTABLE TOILET GLOBAL

**Model:** Product innovation to be sold B2B to low-income toilet service providers.

**Lead:** Lixil

**Date of creation:** 2015

**Status:** Prototypes

**TBC Mentor Chair:** Neil MacLeod, (TBC SteerCo)

**Other TBC members involved:**

Firmenich, Kimberly-Clark, Unilever, UNICEF, WaterAid

### RFL/iDE BANGLADESH



**Model:** The margins generated on mass produced shelters would allow covering the costs of market activation, either through retail or village entrepreneurs

**Lead:** RFL/iDE

**Date of creation:** 2014

**Status:** SanBox scale up & new product prototypes

**TBC Mentor Chair:** Bérangère Magarinos-Ruchat, Firmenich (TBC SteerCo)

**Other TBC members involved:** Firmenich,

Kimberly-Clark, Unilever, Grand Challenges Canada, World Bank, UNICEF, BRAC

## Our theory of change

The past decades have seen a growing appreciation of the role of business approaches to global development. Many coalitions of public and private players have emerged to promote them. Focusing in on business models with the potential to deliver sanitation to low-income markets at scale, we outline here our approach to-date.

Following its formation in 2014, the TBC carried out a landscaping exercise to identify promising sanitation business models. This study identified about 100 pioneering projects implementing or testing market-based approaches to deliver sanitation to low-income consumers based on ten distinct models.<sup>1</sup> Of the 100 projects, the TBC studied 15 projects and businesses more in-depth including on-site visits. From this, two models were prioritised by the TBC for a feasibility study phase which was undertaken in 2015: portable toilets services for densely populated urban areas and developing supply chains for rural and peri-urban areas (i.e. toilet entrepreneur networks). The TBC selected these two approaches based on the strong potential for financial sustainability, potential for added value from private-sector support, and the aspirational individual sanitation solutions for families on offer.

The learning from this experimental feasibility phase has paved the way for the TBC Toilet Accelerator Program. The Toilet Accelerator Program allows the TBC to work with a new selection of promising sanitation business models each year. It is the aim that this annual program approach will allow us to monitor the progress of an emergent sector, connect learnings and build on successes year on year in order to accelerate impact.

### **What success looks like:**

Catalyzing a robust business sector to deliver universal access to sanitation, and replicating to meet universal demand, will require:

- The facilitation of a systems level approach to co-create the necessary ecosystem to support sanitation businesses to scale - together with leaders from business, governments, investment and civil society
- The management of a global pipeline and ongoing process to identify and support the acceleration of innovative market-based sanitation solutions at each point in the sanitation value chain
- The existence of a pre- investment capacity building program to enable the engagement of leading multinational businesses, global sanitation experts and social investors to mentor promising business models for a 6-12 month period with the aim that they will graduate to private investment or partnership to achieve commercial viability and scale
- The creation of a peer group of sanitation entrepreneurs to foster ongoing peer learning and cross fertilization between businesses that have gone through the TBC Toilet Accelerator (TBC Toilet Entrepreneur Country)
- The creation of a platform of knowledge about how to develop, pilot, refine and scale business models to deliver robust sanitation systems to the BoP.

We intend to measure and report on the progress achieved and continuous learning acquired on our journey. A report of our first year of lessons learned has been published on World Toilet Day, 19 November 2015, *Creating Alliances to Accelerate Commercially Viable Sanitation: Lessons Learned from the Toilet Board Coalition*, which is available on our website.

<sup>1</sup> Graf, J., Kayser, O., and Brossard, S. (2014), *Designing the Next Generation of Sanitation Businesses*, Hystra for the Toilet Board Coalition, Agence Française de Développement, UK Department for International Development, Stone Family Foundation, Kimberly-Clark, Unilever



## We are innovating at all levels to accelerate the business of sanitation for the poor.

The issue is urgent. It is unacceptable for anyone to live without access to a toilet inclusive of a complete sanitation system that enables their safe and sustainable use. The latest report from the WHO/UNICEF JMP for Water Supply and Sanitation states that to achieve SDG 6, universal access by 2030, current rates of reduction for open defecation must be doubled.

New approaches to delivering sanitation to low income consumers at affordable prices will be integral to achieving this. We have all of the tools; we now need to accelerate solutions. The Coalition aims to demonstrate that sanitation can be delivered profitably to underserved communities. In doing so, we will catalyse a new business sector: market-based sanitation solutions tailored to the needs of low-income families and individuals. Building a co-ordinated sanitation ecosystem, one that aligns businesses, utilities, governments and civil society, will help achieve the impact we all want to see.

The Toilet Board Coalition has been bold in its approach, innovating at every step, since its launch. From its unique public private partnership model, to its hands on approach to working with promising initiatives, it thinks differently about solutions to the global sanitation crisis. Over the past months I have had the opportunity to consult with our global sanitation community expert members who have been resounding in their optimism for increased private sector engagement on this important issue. From the perspective of the TBC's corporate members, producing this paper gave them the opportunity to reflect on the power of the Coalition, compounding their confidence, and demonstrating that the whole is a much greater force for change than the sum of its parts. Most importantly, the members unanimously expressed that now, equipped with lessons of the past year, we need to move faster to scale solutions. From our learnings to date we recognise that not all initiatives will be successful, many may fail. But we need to fail fast, and build on all ideas as we move to next generation solutions.

As we move into 2016, I have proposed an "Accelerator" approach to the way we work. Our focus is on refining our process to amplify our support to innovative sanitation initiatives, that take a full system view, and that keep an eye on resilience into the future. Collaboration is at the heart of how we work in the TBC. The potential gains of closer interaction between businesses, NGOs, academia, investors and governments, shaping a strategic agenda for the delivery of sanitation across Asia, Africa and Latin America cannot be underestimated. We are already working to better harness the depth of expertise that exists within the leading organisations of our membership, to build our pipeline, and expand our reach through new networks. By this time next year, I expect our governance to have evolved further as we welcome more like-minded members from across the corporate, investment and development worlds to support a diverse array of innovative sanitation businesses.

If you find that our vision strikes a chord with your own, please get in touch. For more information about the work of the Toilet Board Coalition, visit [toiletboard.org](http://toiletboard.org), or contact me directly at [hicks@toiletboard.org](mailto:hicks@toiletboard.org). I look forward to hearing from you.

A handwritten signature in blue ink, appearing to read 'Cheryl D. Hicks'.

Cheryl D. Hicks  
Executive Director, Toilet Board Coalition

**Honorary Chairman:**

Jean-Laurent Ingles (Unilever)

**Directors**

Chairman: Madhu Rao (Unilever)

Vice-Chairman: John Stone (Stone Family Foundation)

Vice-Chairman: Mauricio Troncoso (Kimberly-Clark Corporation)

Executive Director: Cheryl Hicks (TBC Secretariat)

**TBC Steering Committee**

Charlie Beevor (Unilever), Guy Howard (UK Department for International Development), Jon Lane (Independent Director), Neil Macleod (Independent Director), Bérangère Magarinos-Ruchat (Firmenich), Jim McHale (LIXIL Corporation), Virgilio Rivera (Independent Director), Nathaniel Scott (USAID), Andrew Taylor (Grand Challenges Canada), Mauricio Troncoso (Kimberly-Clark),

**TBC Partnership Council**

Carlos Almasque (Firmenich), Vikki Bolam (LIXIL Corporation), Lizette Burgers (UNICEF), Val Curtis (London School of Hygiene and Tropic Medicine), Pete Dulcamara (Kimberly-Clark), Céline Gilquin (French Development Agency), Jonathan Hague (Unilever), Erik Harvey (Water Aid), Neil Jeffery (WSUP), Lu Shen (Asian Development Bank), David Shimkus (Water Supply & Sanitation Collaborative Council), Lewis Temple (BRAC UK), Sophie Tremolet (World Bank Water and Sanitation Program)





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