KEREA
Kenya Renewable Energy Association

KENYA RENEWABLE ENERGY ASSOCIATION

STRATEGIC PLAN

2021-2025

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List of Abbreviations

B2C	Business-to-Customer
C&I	Commercial & Industrial
EC	Executive Committee
EPC	Engineering, Procucement and Construction
KEREA	Kenya Renewable Energy Association
MFI	Microfinance Institution
PAYG	Pay-As-You-Go
PPA	Power Purchase Agreement
PUE	Productive-Use-of-Energy
R&D	Research & Development
RBF	Results-based Finance
SHS	Solar-Home-System
SP	Strategic Plan
SWH	Solar Water Heater
SWOT	Strengths-Weaknesses – Opportunities – Threats
TVET	Vocational education and training

I. INTRODUCTION

1. Background & Objective

KEREA, as the Renewable Energy Association of Kenya, is a Business Membership Organization (BMO), which represents the interests of the Renewable Energy Industry in the country. Through various services and advocacy KEREA wants to promote the development of the RE market, including various market segments (grid-connected, off-grid segments such as minigrids, SHS and stand-alone systems for productive use) and various technologies, including solar PV, solar thermal, hydro power, bioenergy etc. In addition, it has the objective to increasingly trigger discussions about innovative topics such as e-mobility, tidal wave technology etc, which are still in very early stage and thus, are not yet represented by established companies.

Formed in the year 2002, KEREA continuously makes efforts in growing along with the market. Strategic plans are considered to be the guideline for the further development and to allow a target-oriented representation of interests of their members.

The strategic plan 2021-2025 is supposed to

- Give a clear direction about objectives to be achieved and how they shall be achieved
- Provide the basis for the development of target-oriented annual activity plans
- Include a needs-oriented roadmap, which supports the RE industry to develop business,
- Strengthen and consolidate the impactful and visible position of KEREA as RE sector leader, who significantly contributes to the creation of conducive political and regulatory framework conditions
- Show a realistic finance plan, which allows KEREA to become more self-sustainable and, thus, more independent.

Much attention is given to this plan, as KEREA itself at a critical turning point: A very weak Secretariat, which lacked permanent professional staff, made it difficult in the past, to work as a professional industry association. This affected the confidence of cooperation partners in the performance of organization. To re-gain the confidence and strength, KEREA wants to restructure and, thus, looks for a clear way to become more sustainable.

2. Methodology

In regards to the importance of this Strategic Plan, it has been elaborated in a very participatory way, including members of all working groups (representing the different market segments) and cooperation partners such as donors and other associations. For facilitating the elaboration process, KEREA contracted an independent consultant, which was financed through the partnership project of KEREA with the German Bfz.

The overall approach for the elaboration of the Strategic Plan (SP) consisted of 3 main steps:

(1) Assessment of needs of KEREA members and of the feedback on KEREA: Individual meetings with companies of all market segments, with representatives of the Government, other associations such as GOGLA and, finally, with donors.

(2) Elaboration of activity plans/ roadmaps for the various market segments: Small workshops with each working group

(3) Editing of the Strategic Plan including a finance plan, also including feedback from Board and donors on the draft Strategic Plan.

It has to be underlined, that this SP is fully based on inputs and ideas of the members, the working groups and the Board. Guiding idea is that the strategic plan is really used and implemented.

It was tried to be realistic, i.e. reflect an organic and intrinsic growth path, which has the chance to be financed not be too complex and easy enough to be a feasible basis for the annual activity plans and to allow a good monitoring (measurable indicators, milestones etc.).

II. STATUS

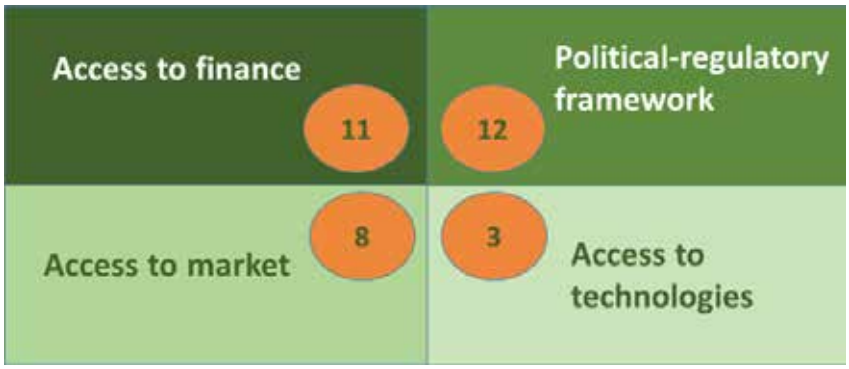
To assess the needs and to get feedback about strengths and weaknesses of KEREA, the consultant conducted 33 interviews with stakeholders, including KEREA members, Board members, representatives of government, donors and other associations. A detailed report about the assessment is available. This SP gives only a short summary of the outcome.

1. Challenges and needs in the RE industry

The challenges can generally be categorized as follows:

- **Challenges related to the political-regulatory framework**, including e.g. political targets and prioritization of technologies and/ or market segments, standards for products and installations, regulations such as net-metering, obligations in terms of mandatory equipment such as SWH; taxes etc.
- **Access to technology**, including also the issue of quality assurance/ good quality products
- **Access to market**, including challenges to raise general awareness about the feasibility of RE solutions, to reach out especially clients in remote areas as well as to develop smart business models etc.
- **Access to finance**, including customer finance and finance of RE companies.

Figure 1: Overview about challenges



As figure 1 shows, the stakeholders see most challenges in the political-regulatory framework, followed by access to finance and access to markets.

It clearly turned out, that advocacy/ lobbying is the primary reason of members to join KEREA. Issues for advocacy are often very specific to the different market segments, but there are also few cross-cutting topics such as the taxation issue and the licencing requirements and procedures.

Table 1:Challenges/ needs in terms of political-regulatory framework

Category	Topics
Cross-Cutting ("Fire Fighting")	• Taxation • Licensing(e.g for importing and selling batteries, licensing for smaller projects)
Cross-Cutting persistent,continous lobbying	• Lobbying for compliance with standards (fighting against sub-standard products and systems and systems in the market • lobying for cost effective tarrifs for fossilfuel energy • With regard to the new Energy act (In place since 2019) regulations (e.g Solar PV) have tobe reviewed and aligned with the act and the new regulation have to be developed • Establising broader networks, e.g Ministry of Education, Health, Agriculture, etc.
Market Segment Specific topics (Examples)	**SHS:** Shaping the regulatory framework for digital payment etc. **PUE:** Providing evidence for the importance of PUE (e.g From food security perspective); lobbying for incentive systems for PUE systems (based on assesed viability of investments in PUE systems) **Biogas:** Research on what kind of regulations are needed; research on why busineses are not growing /evidence for lobbying for incentive systems **Minigrids:** Minigrid regulations (what happens if grid comes; reqyirements to get contractor license, etc. **SWH:** Reactivating the SWH regulations which were annuled in 2018 **C&I:** Net-metering **Utility -Scale:** Delays of PPAs etc.

In regards to **access to finance**, challenges are seen both for the RE companies themselves as well as for their customers: It was highlighted that especially the smaller, LOCAL companies (including distributors) struggle to get finance, e.g. those which sell products on basis of PAYG or generally have business models, which allow customers to pay for the system over a longer period (supplier credit, leasing/ rent-to-own etc.).

Table 2: Challenges/ needs in terms of access to finance

Category	Topics
Supplier finance	• For "**pure" Kenyan companies including distributors of systems which are soldon basis of PAYING model** which requires a lot of working capital; not so relevant for the few"big" intenational companies • For new upcoming ventures (even forlarger international companies), e.g PUE: information about grants and RBF schemes etc. • **Portfolio for development for funds**
Customer finance	• Of high relevance for **those companies which(partly) rely on on B2C** • Engagement / sensitization of **MFI's** (Segment of SHS,PUE, Biogas) • **C&I** Investments are usually of a too small ticket size, which is of no interest fo may financiers • **C&I** working on **making local insurances** available, for mitigating risks from financiers' perspective
Project finance	• E.g for 40 MW projects, investors have to be engaged • Information about available suppoprt / finance for mini grid developers

And even for larger (international) companies it is not so easy to mobilize funds, especially if they want to venture in new segments (e.g. in the field of Productive-Use-of-Energy). Information about grants, RBF-schemes as well as other finance (equity/ debt) is needed. Customer finance is especially an issue for those RE companies, which partly rely on B2C (Business-to-Customer). In this context, MFIs for instance have to be sensitized and mobilized.

In context of **access to market,** there is the need for market information, especially in increasingly upcoming market segments such as "Productive-Use-of-Energy". It is wished, that KEREA would explore new market opportunities, help to assess the market potential, e.g. in agriculture through modern behavior assessment methods.

Table 3: Challenges/ needs in terms of access to market

Category	ASPECTS / ACTIVITIES
Information about market potentials	• Taxation • Licensing(e.g for importing and selling batteries, licensing for smaller projects)
Raising awareness of potential clents	• Developing marketing tools (too expensive for small/micro enterprises • Organizing road shows in rural areas (especially for those companies, targeting small holder farmers cooperatives etc.) (PUE, biogas etc.) • Still also general awareness raising for RE (through adverts - Radio,TV), as reputation has been damaged by bad quality products and non-properly sized systems • Reaching out to customers for briquettes
Linkages to & strengthening (potential) distribution partners	• Training of EPC's e.g about storage technologies (improving the understanding about battery technology etc.) • Training of installers

In addition, interviewed stakeholders still see the need for awareness raising activities, both for addressing the general public (e.g. through adverts in radio and TV etc.) and for reaching potential customers/ investors of RE systems, e.g. by organizing roadshows.

Table 4: Challenges/ needs in terms of access to technologies

- **Information about cutting-edge technologies for components** such as batteries (even companies with own R&D and sourcing teams abroad expressed this need)
- **Information about appliances:** Increasingly needed, as RE companies shift more to the market-acceleration-business model,which includes not only the supply of the solar but also of the energy consuming equipment (refgirator, TV etc.)
- **Training about good-bad quality**
- **Linkages to manufacturers:** trips e.g. to Germany were very effective (much more than visiting exhibitions)

Compared to the other categories, **access to technology** was not so often mentioned as a challenge. However, the problem of many sub-standard/ low-quality products in the market is considered by many companies as a key issue, e.g. in the market segments of biogas/bioenergy, SWH and SHS. The idea of introducing a kind of a voluntary certification/ labelling scheme came up several times.

Apart from that, companies obviously appreciated the organization of business trips e.g. to Germany few years ago and would love to see this activity re-vitalized, as such trips allow much more than any trade fair to establish linkages to good manufacturers.

2. Strengths and Weaknesses of KEREA

Generally, **KEREA shows positive dynamics**, which is reflected e.g. by

- The re-vitalization of several working groups
- The mobilization and incorporation of representatives from companies of different market segments in the EC of KEREA
- Rising revenues from membership fees: After having sharply decreased between 2015-18 from 1,1 million KSH to 520,000 KSH, the revenues increased in 2019 by 12% and reached 583,000 KSH.

Table 5: SWOT analysis of KEREA

STRENGTHS	WEAKNESSES
• Positive dynamics • Somehow active lobbying (taxation etc.) • Established relationship with most "core" gorvenment bodies • long track-record (KEREA was very pro-active in regards to the National Electrification Strategy and the developmentof PV regulations) • Largely responsive secretariat • Organizing events • StrongSHS working group	• Lack of CONTINOUS and SYSTEMATIC work • Rather re-active, not pro-activ • Lack of neutral leadership; no CEO • Lack of proffesionalsin secratariat • Lack of compliance with procedures • Low levelof activities (services); limited effectiveness and activities • Not representing full scope of industry; not enough private companies in the Board • Lack of mangement (e.g. Annual statistics about membership etc.

OPPORTUNITIES	THREATS
• Dynamics in the sector(revision of regulations, drafts of new regulations; PUE segments etc. • Significant potential new members • recognized mandate/role of "shaping the RE industry" • Strong willingness of donors to cooperate with KEREA and support then to become stronger • Regional associations such as GOGLA showa high level of activities which provide windows for opprtunities for national RE associations	• Loss of credibility • Further fragmentation of the BMO landscape • membersare not paying and leaving, members donot engage • overall ecosystem ofRE system affected

Members appreciate the active lobbying on taxation issues and the responsive Secretariat. Despite these positive dynamics, KEREA is considered to be quite weak, although the association exists already for many years.

The main reason for the weakness is seen in the lack of professionals in the Secretariat, and especially of a CEO, who is important to ensure a systematic and continuous work and to actively push and coordinate activities. As there is not such a CEO, the level of activities is quite low, which is also reflected in the financial statements: While revenues e.g. in the year 2015 were generated through services/ activities such as subscription from voluntary accreditation (e.g. 500,000 KSH in 2015) and advertisement in Energy Digest, there are no revenues any more from any services. The weaknesses resulted in the decreasing revenues from memberships: In 2019, KEREA had 46 paying members, out of which 18 are corporate members. According to some interviewed stakeholders, the full scope of the RE industry is not sufficiently represented by KEREA.

The re-vitalization of working groups and the incorporation of representatives from various market segments in the EC, are an initiative to address some of the weaknesses.

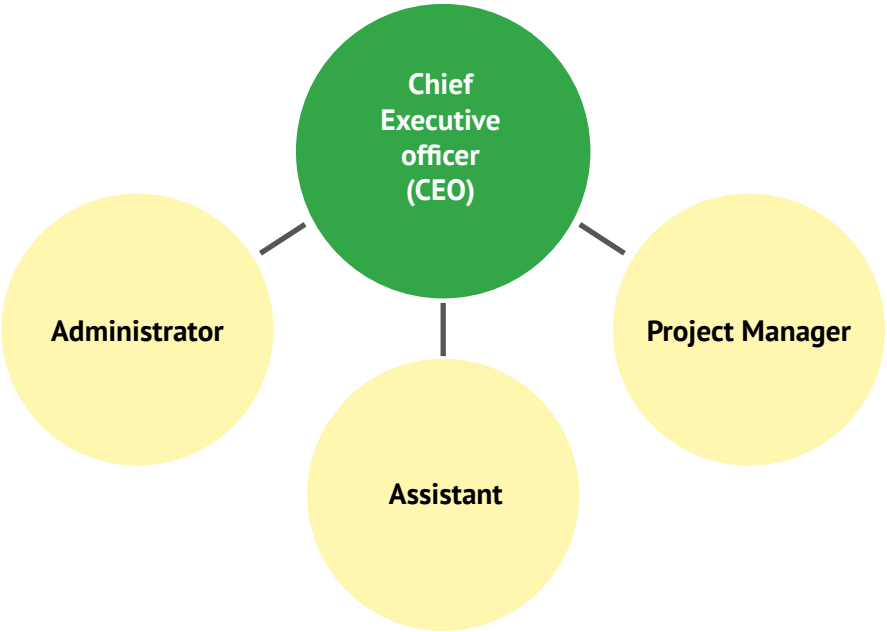
The opportunities are huge: Generally, KEREA has a recognized mandate and role of being the voice of the RE industry. In consideration of the ongoing and upcoming work on the regulatory framework – e,g, Solar PV regulations have to be reviewed and aligned to the new Energy Act – as well as the existing challenges in many segments (net-metering, de-activated SWH regulations, mini-grid regulations etc.), KEREA has the chance to play an active role. In addition, donors are implementing a lot of relevant programmes, which provides windows of opportunities for cooperation with KEREA (see also chapter 3). In this context, KEREA highly appreciates that developing partners are willing and ready to cooperate.

III. Strategic Plan (2021-25)

1. Professionalization of the KEREA Secretariat

In consideration of the received feedback from all relevant stakeholders, **KEREA decided to professionalize and to play a much more active role. For this purpose, the Secretariat shall clearly be strengthened, especially by employing a CEO**, who is not only able to manage and coordinate the activities of KEREA, but also to do "technical" work, e.g. providing inputs to studies, working on stakeholder maps, elaborating case studies for showcasing vis-a-vis different stakeholders (potential investors/ clients, financiers, government etc.).

Figure 2: Planned structure of KEREA Secretariat



In the past years, the full-employed staff of the Secretariat only consisted of an administrator and assistant. The management was done by the Board.

Employing a CEO will allow **to separate the functions**, i.e. the management from the supervising Board. In addition, a **systematic approach and continuity in key activities such as advocacy as well as pro-active development of demand-oriented activities** will be possible. Finally, a day-to-day professional leadership will ensure that KEREA **complies with all formal requirements of an industry association**, the key basic condition for being recognized by partners, members and government. The CEO will make sure, that annual statistics about number of members and about revenues from different sources will be compiled and properly reported (including the annual report); the annual report will not only summarize the conducted activities, but conclude to what extent the annual activity plan, which shall be elaborated at the beginning of each year, has been implemented. In this context, the implementation of the annual activity plan will regularly be monitored.

To become a more professional association, KEREA also plans to have an own office. Actually, KEREA is hosted by the Strathmore University.

2. Kind of activities and role of KEREA (Secretariat)

In consideration of the challenges as clustered above – political -regulatory framework, access to finance, access to market and access to technology/ quality assurance – KEREA generally plans the implementation of following kind activities (table 6); table 7 describes roughly the scope of work to be done by the Secretariat (CEO etc.). It illustrates, that the **Secretariat's role shall not longer be limited to coordination, collecting feedback from members on documents which are circulated by governments and donors etc., but rather provide sound "technical" inputs**.

Table 6: Overview about planned kind of activities

Category of activity	Kind of activity	Description/ remarks
Research/ information	Studies/ Research (Type 1)	Studies, where KEREA will be very pro-active and plans to be in the driving seat
	Studies/ Research (Type 2)	Studies, where KEREA will provide technical inputs (CEO and members), but partners will coordinate and manage
	Reference projects/ Case studies	Showing the profitability and benefits/ impact of certain solutions and technologies; can be put in different narratives, depending on the target groups (government, financiers, clients etc.)
	Stakeholder mapping	basis for establishing networks in market segments of PUE, biogas/ bioenergy etc. and in finance sector; basis for advocacy and other key activities (e.g. events)
Advocacy/ lobbying	Position papers	For ensuring a knowledge-based and systematic advocacy.
	Conferences/ Workshops	
	Roundtables (esp. for advocacy)	
	General advocacy (strategy development for key topics)	
Marketing/ awareness raising	Decentralized workshops, with visits of reference projects	For reaching and engaging local governments, multipliers and customers in various counties.
	Marketing material	Is of great help especially for (very) small companies
	Roadshows (3-4 days)	Provide an excellent platform for companies to reach and engage local governments, multipliers in various counties and to reach remote customers
Quality assurance	Development of (technical) guidelines	As basis for trainings of installers; can also be used as basis for the voluntary certification schemes
	Development of checklists	e.g. for C&I projects, installers have to prove the correctness of installations (e.g. information to be provided by the installer about installed components, norms, standards, safety regulation)
	Development of voluntary certification/ labelling scheme	For creating/ strengthening the confidence of customers/ investors and financiers; reducing technical risks
Access to finance	Dialogue with finance institutions (meeting with 1 institution or workshop)	Based on assessment of finance landscape and on documented case studies, which provide evidence about profitability of investments; for promoting partnerships between companies and FIs
	Training of companies on business plans/ becoming more ready for finance	For supporting them to become ready for fundraising, for approaching funds/ FIs
Others	Implementing special projects	e.g. partnership with TVST institution to promote practical, demand-oriented vocational trainings

Table 7: Scope of work of Secretariat, activity-wise

Kind of activity	Scope of work of Secretariat
Studies/ Research (Type 1)	Development of scope and table of content; own collection of information; own analysis and finalization
Studies/ Research (Type 2)	Contributing technically to defining scope and table of content; partly collection of information or collection together with consultant; contributing to analysis and final documentation
Reference projects/ Case studies	specifying an analytical framework for case studies (key information which shall be documented), inviting members of WG to submit case studies, setting-up a kind of database, selecting those which are most proper for communication purpose (to finance sector, government, customers etc.)
Stakeholder mapping	Defining stakeholder groups/ categories to be mapped; searching contacts and doing interviews based on interview guidelines; documenting the information, presentation
Position papers	Working closely together with the WG: sharing and presenting findings from studies --> evidence; facilitating the dialogue about recommendations which the paper shall give; drafting and finalization
Conferences/ Workshops	Development of agenda, acquisition of speakers, invitation list and follow-up with invitations, organizational aspects etc.
Roundtables (esp. for advocacy)	Development of agenda, acquisition/ inviting participants; supporting the preparation of inputs; MoU; organization
General advocacy (strategy development for key topics)	per topic: elaborating an advocacy strategy: deciding to what extent a study has to be done for providing evidence and to come to a clear position; developing a rough roadmap with key activities (roundtables when and with whom, bilateral meetings with key persons, conference etc.)
Decentralized workshops, with visits of reference projects	Development of itinerary +agenda; organization; realization/ participation, reporting
Marketing material	Working closely with WG: Specifying target group(s), collection and compilation of information/ content, refining through dialogue with WG, hiring/ coordinating layout and print
Roadshows (3-4 days)	Proposing an itinerary; discussion and finalization of itinerary with WG, organization, completing marketing material/ presentation material if needed, roadshow realization, reporting etc.
Development of (technical) guidelines	Coordination and facilitating the cooperation of the consultant with members
Development of checklists	Coordination and bringing all inputs together and drafting + finalizing the checklists (3-4 WG sessions etc.)
Development of voluntary certification/ labelling scheme	Assessing lessons learnt from other countries (interviews with stakeholders in other countries); analysis and preparation of options/ possible features; workshop with WG on main features; proposal with design; ppt to EC etc.
Dialogue with finance institutions (meeting with 1 institution or workshop)	Carefully elaborating communication strategy with FI (with WG), summarizing the case studies (see above) from financier's perspective (KPIs, risk mitigation etc.); trying to come to a pipeline of projects to be financed/ compilation of projects to be financed (information about KPIs); maybe in-advance training of companies/ project owners on pitching; organization (speakers, inviting participants), summary/ report/ article etc.
Training of companies on business plans/ becoming more ready for finance	Defining scope of training (in dialogue with members and with peers); identifying and contracting trainer, commenting on training agenda proposed by trainer, marketing/ invitation, participation, reporting/ feedback survey etc.
Implementing special projects (e.g. partnership with TVST institution to promote practical, demand-oriented vocational trainings)	Project management

The described scope of work of the KEREA Secretariat will of course only be possible, **if the costs for the CEO as an expert can be financed, which requires an active and continuous fundraising of KEREA, on basis of concrete project proposals to be submitted to potential sponsors and cooperation partners.**

3. Roadmap, 2021-2025

3.1 Overall roadmap of KEREA

Based on discussions in the various working groups and in consideration of the envisaged capacities of the KEREA Secretariat, following roadmap has been elaborated, showing how many of each kind of activities shall be annually implemented in the next 4 years.

Table 8: Overall roadmap of KEREA, 2021-25

Kind of activity	Number of activities					Number of expert days (SECRETARIAT)				
	21	22	23	24	25	21	22	23	24	25
Studies/ Research (Type 1)	1	0	0	0	0	20				
Studies/ Research (Type 2)	1	1	0	0	0	10	10			
Reference projects/ Case studies	3	1	0	0	0	24	8			
Stakeholder mapping	1	2	0	0	0	8	16			
Position papers	3	3	0	0	0	15	15			
Conferences/ Workshops	1	2	2	2	2	10	20	20	20	20
Roundtables (esp. for advocacy)	2	2	2	2	2	12	12	12	12	12
General advocacy (strategy development for key topics)	0	0	1	1	1			3	3	3
Decentralized workshops, with visits of reference projects	0	1	4	3	3		6	24	18	18
Marketing material	1	0	0	0	0	10				
Roadshows (3-4 days)	0	0	2	4	4			24	48	48
Development of guidelines	0	1	0	0	0		6			
Development of checklists	0	2	0	0	0		12	0	0	0
Training of installers	0	4	4	4	4		16	16	16	16
Development of voluntary certification/ labelling scheme	0	0	2	1	0			30	15	
Dialogue with finance institutions (meeting with 1 institution or workshop)	0	0	4	4	4			40	40	40

Training of companies on business plans/ becoming more ready for finance	0	0	1	0	0			8		
Special project, e.g. Partnership project on vocational education and training in the RE sector	0	0	1	1	1			123	123	74
TOTAL						**109**	**121**	**300**	**295**	**231**

The overall roadmap is the result from the roadmaps/ activity plans in the various market segments, which are presented in the next chapter. The roadmap is considered to be a preliminary plan and shall be adjusted on annual basis.

Regardless the specifics in each market segments, KEREA plans to align its activities to few strategic outlines:

- As voice of the **entire RE sector, KEREA will become much more active beyond SHS**: The first step has been done in 2020, by re-activating working groups in the market segments SWH, Bioenergy, Productive-use-of-Energy and C&I. Other working groups can still be set-up, e.g. in the segment of mini-grids.

- **Shift from sponsorship of single activities to packages of activities/ projects**: For making the fundraising effective and also to allow to shape the RE industry systematically, KEREA wants to bundle activities and, thus, to design projects, in close dialogue with partners.

- KEREA intends to **allocate as many expert days of the Secretariat as possible to concrete activities: More days are allocated and priced in proposals to sponsors, lower can the per-day honorarium be.**

- **High priority is given by all to advocacy, which is seen as the main motivation for being member of KEREA**: To be more effective, the lobbying will be more systematic and knowledge-based. In this regard, studies will play an important role. Networks with governmental entities and potential partners (other associations etc.) will be extended. The market segments of bioenergy and PUE, which are at the nexus of energy and food, provide plenty of opportunities to extend the network of KEREA.

- **Access to finance will be a new field of activity for KEREA**, across almost all market segments. A strategic approach will be chosen: As a first step, KEREA will do an assessment and mapping of the finance landscape. Instead of doing it for each segment, it is worth to do it once for all segments. The assessment will allow to set-up the network. Based on compiled case studies, which shall provide evidence about the profitability of investments and companies, and regular dialogue events (either workshops, smaller roundtables or small meetings with individual, finance institutions), the local finance sector shall be engaged. In this context, KEREA could become a kind of aggregator especially for small-scale projects and, in general, for smaller tickets, to show that there is a significant market potential, which make it more worth for local banks to offer loan products. At the same time, KEREA can set-up and make available a small pool of advisors and trainers, who can train and coach companies to get ready for raising funds (training about business models, business plans, pitching etc.).

- **Re-activating work on quality assurance:** In almost all segments, the private sector expressed the need for quality assurance. And the Government, e.g. KEBS, sees KEREA in the role of making the RE industry comply with the standards, through raising awareness about standards and a kind of self-regulation (voluntary certification and labelling schemes). The overall purpose is to levelize the playing ground for a ethical, fair competition. Especially if it comes to small projects, there is a rather unethical competition due to lack of compliance with standards. KEREA envisages to develop in some market segments guidelines and/ or checklists for installations; these will be the basis for regular trainings of installers. In addition, voluntary certification schemes shall be elaborated and established. Requirements have to be carefully defined (e.g. regular participation of key staff of companies at certain trainings; inspection

of sample installations through independent engineers etc.). Thus, transparency is created in the respective market and companies get motivated to comply with quality standards.

• **Going into regions**: A huge part of the RE potential are decentralized RE systems in off-grid and/ or weak-grid areas. Reaching local governments and potential customers (e.g. of small-scale biogas systems, PURE systems such as solar irrigation and solar mills) requires decentralized activities. To meet this demand, KEREA plans to organize kind of roadshows and decentralized workshops, which can be combined with the visit of reference projects. A huge part of important multipliers and potential customers and investors are not reached by events in Nairobi, Mombasa or Kisumu.

• **Forfront runner**: KEREA will keep an eye on upcoming new market segments and market trends, to trigger discussions within the associations but also with external stakeholders.

3.2 Roadmap for the various market segments

Biogas/ Bioenergy

Table 9: Roadmap, Biogas/ bioenergy market segment

2021	2022	2023	2024	2025
MARKETING/ AWARRENESS: Developping marketing material (addressing different stakeholders)		**MARKETING/ AWARRENESS:** Roadshows to country side	**MARKETING/ AWARRENESS:** Roadshows to country side	**MARKETING/ AWARRENESS:** Roadshows to country side
MARKETING/ AWARRENESS: Listing of reference projects (for different applications), which can be visited	**MARKETING/ AWARRENESS:** Arranging visits of selected reference projects (for farmer groups around, local government)	**MARKETING/ AWARRENESS:** Arranging visits of selected reference projects (for farmer groups around, local government)	**MARKETING/ AWARRENESS:** Arranging visits of selected reference projects (for farmer groups around, local government)	**MARKETING/ AWARRENESS:** Arranging visits of selected reference projects (for farmer groups around, local government)
QUALITY ASSURANCE: Initiating the development of guidelines (with checklists) for biogas installations	**QUALITY ASSURANCE:** Development of guidelines (with checklists) for biogas installations			
	QUALITY ASSURANCE: Training of installers (refresher courses), based on guidelines	**QUALITY ASSURANCE:** Training of installers (refresher courses)	**QUALITY ASSURANCE:** Developing a voluntary certification (KEREA) regime	**QUALITY ASSURANCE:** Implementation of the voluntary certification (KEREA) regime
		ACCESS TO FINANCE: Dialogue with banks, MFIs, SACCOs and other finance sources	**ACCESS TO FINANCE:** Dialogue with banks, MFIs, SACCOs and other finance sources	
ADVOCACY/ LOBBYING: "Learning from solar": Certification scheme? (for installers/ installation companies)	**ADVOCACY/ LOBBYING:** Standards and regulations	**ADVOCACY/ LOBBYING:** Evidence-based definition of required promotion schemes *(credit lines, subsidies, training of banks on project finance etc.)*	**ADVOCACY/ LOBBYING:** Standards/ regulation/ mandatory certification scheme; Promotion schemes	**ADVOCACY/ LOBBYING:** Standards/ regulation/ mandatory certification scheme; Promotion schemes

In regards to the bioenergy market segment, **a lot of marketing and awareness raising is necessary** to put it in the right context: In the past, especially biogas was too much discussed and promoted in context of poverty alleviation, so that stakeholders do not see it as a chance for serious business.

It shall be made clear, e.g. through showcasing successful reference projects, that the investment in systems can be commercially viable. In addition, roadshows to the countryside and the organization of visits of selected reference projects (e.g. for farmer groups and local government) shall be effective instruments to raise awareness about the viability of biogas and bioenergy solutions.

Several activities are planned for ensuring the quality, which is key for securing a good reputation of the technologies: Kind of guidelines and/ or checklists for the installation of e.g. biogas systems shall be developed; they will provide the basis for some trainings for installers (to some extent refreshing courses). An envisaged further step is then the development of a certification scheme, either one which is similar to the scheme in the solar sector or a rather voluntary scheme, coordinated by KEREA.

Activities related to access to finance only make sense, once KEREA is able to provide evidence about the profitability, e.g. through case studies.

Productive Use of Energy (PUE)

Table 10: Roadmap, Productive-Use-Of-Renewable Energy

2021	2022	2023	2024	2025
STUDIES/ RESEARCH/ INFO: About profitability of various systems and needed incentive schemes; market potential etc.)	**MARKETING/ AWARENESS:** Documenting "success" case studies for various applications (pumping, milling, cooling etc.)	**MARKETING/ AWARRENESS:** Decentralized workshops (local governments, associations), visits of reference projects	**MARKETING/ AWARRENESS:** Roadshows to country side, esp. For addressing potential investors (farmer groups, agro-equipment distributors etc.)	**MARKETING/ AWARRENESS:** Roadshows to country side, esp. For addressing potential investors (farmer groups, agro-equipment distributors etc.)
STUDIES/ RESEARCH/ INFO: Mapping of stakeholders, esp. In agrobusiness (government, associations, suppliers/ distributors of agro-equipment etc.)	**AWARENESS/ NETWORKING:** Conference for presenting the results from study and for initiating the dialogue with key stakeholders	**MARKETING/ AWARRENESS:** Training/ Workshops with support structures (e.g. private + public extension service providers, farmers training institutions)	**MARKETING/ AWARRENESS:** Arranging visits of selected reference projects (for farmer groups around, local government)	**MARKETING/ AWARRENESS:** Arranging visits of selected reference projects (for farmer groups around, local government)
ADVOCACY/ LOBBYING: Establishing contacts to stakeholders (Ministry of Agriculture, farmers association etc.)	**ADVOCACY/ LOBBYING:** Establishing contacts to stakeholders (Ministry of Agriculture, farmers association etc.)	**ADVOCACY/ LOBBYING:** Evidence-based lobbying for promotion schemes *(credit lines, subsidies, training of banks on project finance etc.)*	**ADVOCACY/ LOBBYING:** Promotion schemes	**ADVOCACY/ LOBBYING:** Promotion schemes
	ACCESS TO FINANCE: Mapping of finance institutions (national/ regional/ international; commercial banks, institutional impact funds, crowdfunds etc.)	**ACCESS TO FINANCE:** Workshops/ trainings for companies on business models and getting ready for finance*	**ACCESS TO FINANCE:** Making advisors available for coaching of companies*	**ACCESS TO FINANCE:** Making advisors available for coaching of companies*
		ACCESS TO FINANCE: Dialogue with banks, MFIs, SACCOs and other finance sources ; facilitating the development of partnerships (between suppliers and finance institutions, but also between finance institutions)	**ACCESS TO FINANCE:** Dialogue with banks, MFIs, SACCOs and other finance sources ; facilitating the development of partnerships (between suppliers and finance institutions, but also between finance institutions)	

High priority is given to a study, which shall assess the **market potential** for different PUE solutions and **provide evidence**, to what extent financial incentives, both for suppliers and customers, are needed, in consideration of the different maturity levels of the various solutions (solar pumps, solar mills, solar cold rooms etc.). In addition, the same study or another one shall **map relevant stakeholders**, especially in the agriculture and agrobusiness (government, associations such as farmers federations, larger processors and exporters with interest in securing reliability and quality in the supply chain, farmer training institutions etc.). Such a mapping shall be done mainly by KEREA (Secretariat) and will help to build up the relevant network in this market segment and will **provide the basis for further activities, including decentralized workshops, roadshows, visit of reference projects, advocacy on required incentive and promotion schemes etc.**

The engagement in the PUE segment is considered to be a strategically important step, as it goes beyond the classical energy sector network and opens up opportunities at the energy-food-water nexus. In general, KEREA seeks to play an active role in promoting the deployment of PUE solutions.

Commercial & Industrial captive power

Table 11: Roadmap, market segment RE -Commercial & Industrial users

2021	2022	2023	2024	2025
ADVOCACY/ LOBBYING: Exchange with EPRA (e.g. On licencing procedures): roundtable o.a.	**STUDY/ RESEARCH/LOBBYING:** REAL costs for different energy sources (informing about market distortions)			
STUDIES/ RESEARCH/ INFO: Experiences of other countries with net-metering: how they convinced utilities/ developing a know-ledge based advocacy strategy	**ADVOCACY/ LOBBYING:** Position paper/ influencing strategy and implementation of it (can include the initiating of an exchange of utilities (within East Africa?)	**ADVOCACY/ LOBBYING:** Position paper/ influencing strategy and implementation of it (can include the initiating of an exchange of utilities (within East Africa?)	**ADVOCACY/ LOBBYING:** Position paper/ influencing strategy and implementation of it (can include the initiating of an exchange of utilities (within East Africa?)	**ADVOCACY/ LOBBYING:** Position paper/ influencing strategy and implementation of it (can include the initiating of an exchange of utilities (within East Africa?)
STUDIES/ INFO: Documenting attractive case studies to tell the story about the profitability	**AWARENESS/ NETWORKING:** Conference with government and multipliers (associations of various industries), own conference or contributing to larger events	**MARKETING/ AWARRENESS:** Industry-specific workshops (for creating relevance); In regional industry-clusters; combining with visit of reference project	**MARKETING/ AWARRENESS:** Industry-specific workshops (for creating relevance); In regional industry-clusters; combining with visit of reference project	**MARKETING/ AWARRENESS:** Industry-specific workshops (for creating relevance); In regional industry-clusters; combining with visit of reference project
	QUALITY ASSURANCE: Developing a checklist/ guide for installations, for commissioning grid-connected systems	**QUALITY ASSURANCE:** Setting-up a voluntary KEREA-labelling scheme for projects which comply with checklists	**QUALITY ASSURANCE:** Issuing the project labels (KEREA passport/ certificate) after compliance check	
	ACCESS TO FINANCE: Mapping of local finance institutions; compiling bankable realized projects, and maybe a pipeline (KEREA as aggregator)	**ACCESS TO FINANCE:** Dialogue with banks and other finance sources ; facilitating the development of partnerships	**ACCESS TO FINANCE:** Dialogue with banks other finance sources ; facilitating the development of partnerships	

Highest priority will be given to the advocacy, first of all to work systematically on lobbying for a net-metering scheme, as companies still face the challenge that the feed-in of surplus power from the self-consumption/ captive power systems into the KPLC-grid is not yet regulated. In regards to the long-lasting reluctance of the national utility towards net-metering, KEREA sees the clear need for a systematic and knowledge-based lobbying strategy and approach. A study and position paper could be important to show, how national utilities and the overall country could benefit from a net-metering; international experiences from other countries can be brought in. In addition, the advocacy will include an exchange with EPRA about licencing procedures, as the new energy act caused some confusion to the industry.

A further topic to work on in the next 5 years is the **quality assurance**: Ideas such as the elaboration of a "checklist" for the commissioning of embedded solar systems have been pledged; such a checklist can be coupled with a voluntary labelling scheme of KEREA, according to which projects which comply with the "checklist" get a kind of certificate.

The third pillar of the roadmap in the C&I market segment will be the **extension of awareness raising and marketing**: The focus will be put more on *industry-specific* workshops, to create more relevance, and or on regional industry-clusters. Workshops shall be combined with the visit of reference projects. As in the other segments, case studies/ reference projects will be assessed and made available: They can be used not only in the awareness raising and marketing events, but also in the dialogue with the finance sector.

Solar Water Heater (SWH)

Table 12: Roadmap, Solar Water Heater (SWH)

2021	2022	2023	2024	2025
ADVOCACY/ LOBBYING: Position paper/ influencing strategy and implementation of it (can include information about approaches of other countries)	**ADVOCACY/ LOBBYING:** Position paper/ influencing strategy and implementation of it (can include information about approaches of other countries)			
	ADVOCACY/ LOBBYING: Exchange with EPRA (e.g. Re-activating solar building regulations): roundtable o.a.	**ADVOCACY/ LOBBYING:** Exchange with EPRA (e.g. Re-activating solar building regulations): roundtable o.a.		
STUDIES/ INFO: Documenting attractive case studies to tell the story about the profitability/ provide evidence	**AWARENESS/ NETWORKING:** Conference with government and multipliers (associations of developers, architects etc.), own conference or contributing to larger events	**AWARENESS/ NETWORKING:** Conference with government and multipliers (associations of developers, architects etc.), own conference or contributing to larger events		
	QUALITY ASSURANCE: Developing a checklist/ guide for installations,	**QUALITY ASSURANCE:** Setting-up a voluntary KEREA-labelling scheme for companies	**QUALITY ASSURANCE:** Issuing the labels	**QUALITY ASSURANCE:** Issuing the project labels
	QUALITY ASSURANCE Training of companies & installers, based on checklist etc.	**QUALITY ASSURANCE** Training of companies & installers, based on checklist etc.	**QUALITY ASSURANCE** Training of companies & installers, based on checklist etc.	**QUALITY ASSURANCE** Training of companies & installers, based on checklist etc.
	ACCESS TO FINANCE: Mapping of local finance institutions; compiling bankable realized projects, and maybe a pipeline (KEREA as aggregator)	**ACCESS TO FINANCE:** Dialogue with banks ; facilitating the development of partnerships	**ACCESS TO FINANCE:** Dialogue with banks; facilitating the development of partnerships	

Highest priority is given to advocacy, especially lobbying for re-activating the solar building regulation, according to which SWH were mandatory and suppliers had to be licenced.

For the purpose of quality assurance, the idea has been pledged, that KEREA shall introduce a voluntary certification and/ or labelling scheme, which helps to make e.g. the level of capacities of companies more transparent (for selling small domestic systems, larger installations etc.). Evaluation of capacities could be linked to the requirement of having installers, who regularly participate successfully at certain trainings.

The work on quality assurance is also critical for strengthening the confidence of the finance sector in SWH: As suppliers often find themselves in the situation, where they have to provide supplier credits to customers, which requires a lot of working capital, **KEREA wants to help the companies to come to partnerships with local finance institutions,** which provide loans to customers. Besides the overall understanding of the finance landscape, case studies shall prove the profitability of the systems and dialogue events shall be a platform to boost partnerships between suppliers and local banks.

SHS

The working group SHS is already very active and will continue its work.

Priority is given to

- Advocacy/ lobbying
- Quality assurance, through developing technical manuals/ guidelines for installations
- Capacity building, e.g. training of SHS companies about certain technical aspects, including cutting-edge technologies
- Information of members about "ever-changing" policies and procedures/ bureaucracies.

Special projects

In line with the intended shift from sponsored individual activities to rather projects, **KEREA envisages to initiate a project on making the vocational education and training in the RE sector more demand-oriented and practical**.

The private sector, especially the organized private sector such as industry associations can play a crucial role,

to express the needs for qualifications and to promote practical training modules, which can be integrated in the curricula (e.g. internships or dual apprenticeships). There is a German-financed facility, which supports partnerships of German chambers/ associations with TVET institutions and private sector organizations in partner countries with the general purpose to promote demand-oriented practical education and training. In the past years, there were several of such partnerships implemented in various Sub-Saharan countries in the sector of RE. KEREA sees an opportunity for such a partnership project in Kenya.

The partnership project would allow to employ a project manager, who would be mostly financed through the partnership project in the beginning. KEREA can use such a project, to slowly grow and build-up more capacities, with which the organization can become more self-sustainable.

4. Finance plan, 2021-2025

The finance plan is based on following strategic approaches:

- Salary costs reflect the professionalization of the Secretariat, including a CEO.
- Up from year 3 (2023), it is planned to employ a project manager, assumed that KEREA will have succeeded in the acquisition of a comprehensive project, e.g. a partnership project for promoting the demand-oriented, practical vocational education and training in the RE sector, which would allow to finance at least 50% of the salary of this project manager. The project manager is supposed to increas ingly finance himself by raising funds for certain activities and activity-packages.
- Instead of non earmarked grants, which are unbound and generally finances the Secretariat, KEREA will raise funds through submitting proposals for projects and activities to potential sponsors and cooperation partners.
- The professionalization of KEREA shall make sure, that a clear added value is provided to the RE industry and the companies, so that the interest in being member of KEREA will increase: The revenues from membership fees shall increase by 20% per year, due to slowly increasing fees and raising number of members.
- Revenues shall also be generated by the sales of services, including e.g. sales of studies, participation fees for events etc.

The costs and revenues, as shown below, are ONLY those related to the SECRETARIAT, i.e. that they do NOT include activity-related costs which go beyond the costs of the Secretariat (costs for CEO and project manager, overhead costs), e.g. for event locations, catering, costs for external consultants and others.

Table 13: Overview, costs & revenues (in KSH) for the Secretariat

Costs & Revenues					
	2021	**2022**	**2023**	**2024**	**2025**
Salary costs	8520000	8520000	11949600	11949600	11949600
Admin costs, inc. office rent	2568000	2568000	2568000	2568000	2568000
Costs total	**11088000**	**11088000**	**14517600**	**14517600**	**14517600**
Membership fees	600000	720000	864000	1036800	1244160
Grants, not earmarked (bfz)	2000000	0	0	0	0
Project-related funds	8420000	9886000	13052600	12909800	12470440
Service fees	68000	482000	601000	571000	803000
Revenues, total	**11088000**	**11088000**	**14517600**	**14517600**	**14517600**

Table 14: Finance structure, 2021-2025 (in%)

Finance structure, in %					
Finance source	**2021**	**2022**	**2023**	**2024**	**2025**
Membership fees	5,41	6,49	5,95	7,14	8,57
Grants, not earmarked	18,04	0,00	0,00	0,00	0,00
Funds related to activities/ package of activities/ projects	75,94	89,16	89,91	88,93	85,90
Service fees	0,61	4,35	4,14	3,93	5,53

Despite the slow rise of share of revenues from membership fees and services, **the bulk of revenues has to be generated through fundraising.**

In 2019, there were no revenues at all from service fees. In the period, 2021-25 activities will be developed which generate revenues for the secretariat. By 2025, 5,5% of the total annual costs (only costs for personnel, office and other admin costs of the Secretariat) shall be covered by service fees.

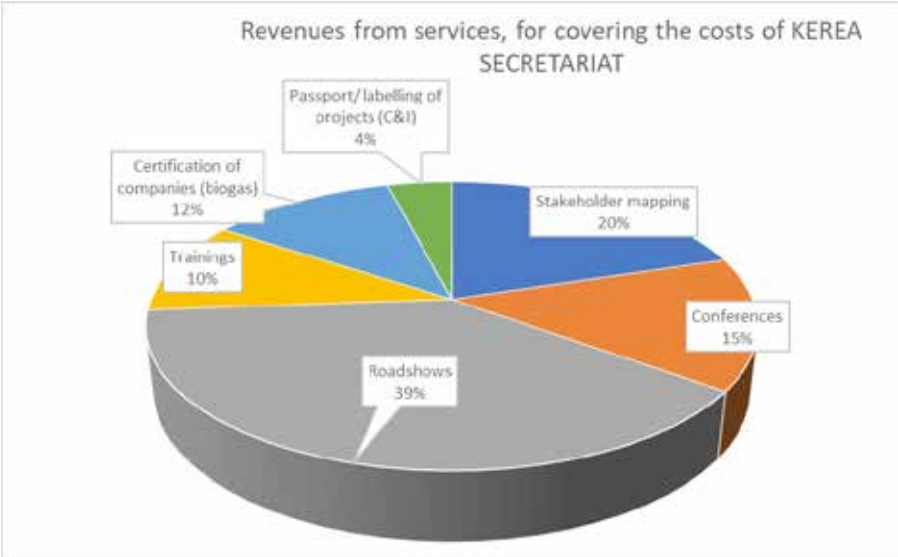
Table 15: Revenues for the Secretariat from service fees (after financing external costs such as rental fee for locations etc.)

Activity	number	Fee/ unit	Total fees	Share of fee for covering costs of SEC	Rev. for SEC	Revenues from service fees for covering SEC costs, per year				
						2021	2022	2023	2024	2025
Stakeholder mapping	3									
Sale of unit	70	14000	980000	0,85	833000	0	238000	357000	119000	119000
Conference Workshops (1 day)	9									
Paying participants	360	5000	1800000	0,34	612000	68000	136000	136000	136000	136000
Roadshows (3-4 days)	10									
Participating companies	50	40000	2000000	0,8	1600000					
Training (2 days)	16									
Trainees	240	18000	4320000	0,1	432000	0	108000	108000	108000	108000
Certification, biogas installers	1									
Companies	30	20000	600000	0,8	480000	0	0	0	160000	320000
Labelling/ passport C&I projects	1									
Number of projects	70	16000	1120000	0,15	168000	0	0	0	48000	120000
TOTAL					**4125000**	**68000**	**482000**	**601000**	**571000**	**803000**

Sources for generating revenues from service fees for covering costs of the Secretariat (costs for external costs such as consultants, event locations, printing costs etc. are excluded) will be as follows:

- Stakeholder maps, which shall be sold
- Participation fees for workshops/ conferences
- Roadshows, where participating companies will pay fees, as the roadshows will be strong platforms to do marketing
- Training fees
- Fees for issuance of certificates for installers (biogas) (voluntary scheme of KEREA for promoting and ensuring quality of installations)
- Fees for issuance of solar "passport"/ label for C&I projects, which comply with checklists/guidelines for installations.

Figure 3: Revenues from services, for covering the costs of KEREA Secretariat



Roadshows will contribute most to the revenues: This results from the relative high number of planned road-shows, in several market segments and the highest fee for participation, as it provides high value-added to the participating companies: meeting multipliers in regions, including local government, meeting many potential customers who are not easy to be reached etc.

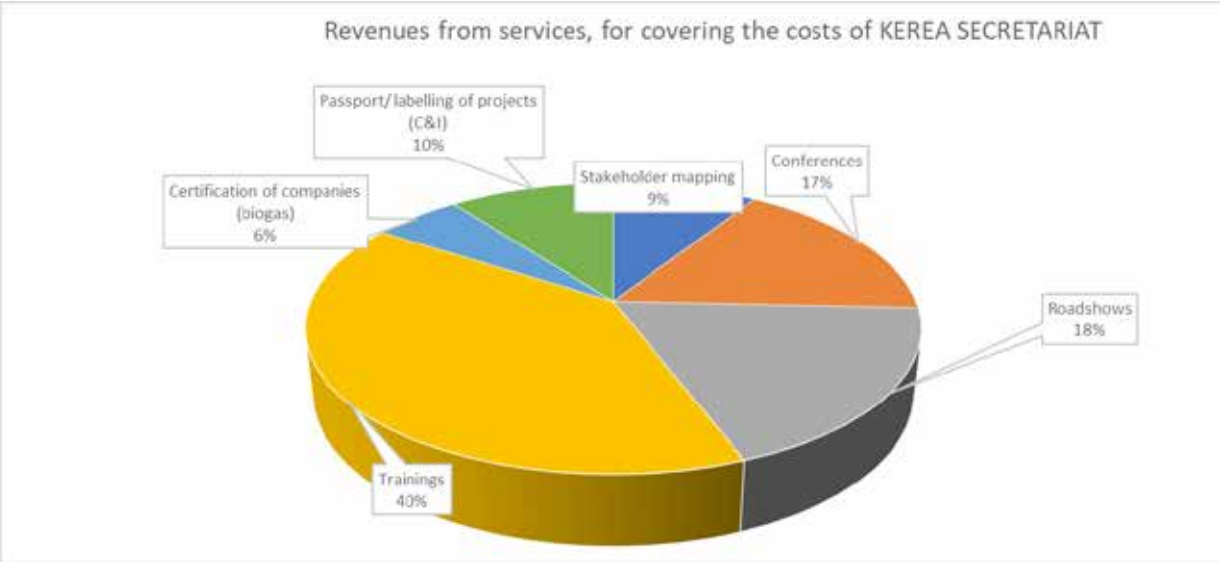
Participation fees for trainings and workshops/ conference have only a share of 10% and 15% in the finance plan. This is partly based on quite conservative assumptions- e.g. 9 conferences are assumed for the whole 5-years period, so that the share can be higher if more trainings and events will be realized. However, these activities are not really "cash-cows" for KEREA, as the fees are mostly for covering external costs (event location, trainer etc.).

If it is assumed that external costs will be sponsored by partners, so that the complete fee can be used for financing the costs of the Secretariat, trainings become the most important source of revenues, with a share of 40% at the total revenues from service fees, followed by roadmaps (see table 16 and figure 4).

Table 16: Revenues for the Secretariat from service fees (external costs are 100% sponsored)

Activity	number	Fee/ unit	Total fees	Share of fee for covering costs of SEC	Rev. for SEC	Revenues from service fees for covering SEC costs, per year				
						2021	2022	2023	2024	2025
Stakeholder mapping	3									
Sale of unit	70	14000	980000	1	980000	0	280000	420000	140000	140000
Conference Workshops (1 day)	9									
Paying participants	360	5000	1800000	1	1800000	200000	400000	400000	400000	400000
Roadshows (3-4 days)	10									
Participating companies	50	40000	2000000	1	2000000					
Training (2 days)	16									
Trainees	240	18000	4320000	1	4320000	0	1080000	1080000	1080000	1080000
Certification, biogas installers	1									
Companies	30	20000	600000	1	600000	0	0	0	200000	400000
Labelling/ passport C&I projects	1									
Number of projects	70	16000	1120000	1	1120000	0	0	0	320000	800000
TOTAL					**10820000**	**200000**	**1760000**	**1900000**	**2140000**	**2820000**

Figure 4: Revenues from services, for covering costs of KEREA Secretariat



Even if some services such as the sales of stakeholder maps do not generate so much revenues, they are very important from strategic point of view: They help to build up knowledge within the secretariat and provide the basis for extending the network, which is crucial for further key activities such as advocacy/lobbying and organization of events (conferences/ workshops etc.).

Cooperation with developing partners

KEREA appreciates much the cooperation with partners, including various developing partners and other associations. In respect of the strong interest and willingness of the partners in collaboration, to jointly promote the Kenyan RE sector, **KEREA commits to make all efforts in professionalizing the organization.** The employment of a CEO will allow to bring in professional inputs, to be pro-active and to make sure, that requirements at a registered industry associations and standards will be met.

KEREA sees plenty of opportunities for a stronger and closer cooperation with partners. Table 17 gives only an overview about few examples. It will be up to the CEO to have a regular dialogue with actual and potential partners to explore systematically possibilities for cooperation,

- for raising funds for initiatives of KEREA (driven by members)
- for bringing KEREA in as active partner for initiatives and programmes of partners.

Table 17:Windows of opportunities for cooperation with donors (few examples)

GIZ	▪ **ENDEV,** worked in the past a lot on cookstoves and (pico) SHS, but now increasingly on PUE; principally strong focus on strengthening the private sector ▪ **PDP – Project Development Programme:** Trainings on solar PV (e.g. for EPC) and matchmaking, working a lot on project development in the C&I segment ▪ **Cooperation opportunities:** Interest in collaboration for publications/ research on PUE etc.
ACE-TAF	▪ Programme funded by DFID, 2018 – 2022, 14 countries ▪ Aims to catalyse a market-based approach for private sector delivery of renewable energy electrification technologies, with a focus on high quality stand-alone solar systems ▪ Focus on enabling environment for private sector (policy & regulations), knowledge management and coordination ▪ **Past cooperation:** Solar PV importation guideline ▪ Cooperation opportunities: research/ publications
TEA – PowerUp!	▪ Transforming Energy Access (TEA), funded by DFID ▪ GOGLA leads the project POWERUP, on strengthening national RE associations to promote off-grid solar markets ▪ Project Dec 2018 – December 2021 ▪ **Activities:** Trainings for the associations, support in collection national data; ▪ **Cooperation opportunity:** 3 funding windows for associations, which can submit project proposals,
Power Africa – Offgrid	▪ Provides TA and targeted grant funding to support the development of SHS and minigrid sectors; aiming at promoting the private sector ▪ Includes market intelligence, hands-on support to companies (including access to finance), advice on supportive policy frameworks ▪ **Cooperation opportunities:** Collaboration on annual major publication (Coordinating peer review, focus group meetings, marketing etc.)
SNV	▪ **Managing a solar RBF facility** (12 Mio. USD), in context of KOSAP (deployment of SHS to 250,000 households) ▪ **Promotion of solar-powered systems** for productive use (ENDEV III): Supporting distributors/ call for proposals and policy advisory including development of standards for productive use etc, ▪ **Cooperation opportunities:** Vital interest in cooperation on PUE, incl. e.g. doing a study on gaps and needs; advocacy, awareness raising/ education
Sequa/ BMZ	▪ **Finances partnership projects** between German TVET institutions and TVET institutions as well as BMOs in partner countries, which follow the objective to strengthen the local TVET-system, e.g. in selected sectors such as RE ▪ **Cooperation opportunity:** KEREA as partner in such a project, for promoting the demand-oriented and practical-oriented vocational education and training in the RE sector.

Strategically, the **cooperation with developing partners will be aligned with following strategic principles:**

- **Phasing out non-earmarked grants** which are not bound right from the beginning to concrete activities

- Shift from sponsorship of individual activities to sponsorship of packages of activities ("projects")

- **Bringing in PROFESSIONAL (technical) inputs,** based on the expertise of the CEO and KEREA members

- **Funding/ sponsoring of activities and projects shall always include the costs of the involved KEREA personnel (Secretariat)**[1].

- **Diversification of the cooperation** with partners: Besides the collaboration with RE programmes, KEREA will also look for **windows of opportunities of ongoing/ upcoming programmes in other fields such as inclusive finance/strengthening of MFIs, vocational skills development programmes as well as agricultural programmes** (Green Innovation Center of GIZ, IFAD, USAID etc.). Programmes in these other fields are relevant, especially in regards to the promotion of the market segments of PUE and biogas and in regards to the new activity field of improving the access to finance.

1 For instance, if the CEO/ senior professional will work 20 days on a research study (technical inputs, general coordination etc.), maybe together with external experts, these days should be properly priced in an offer and proposal to the donors/ sponsors.

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