



## Strategic Business Plan 2012 - 2020



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- **Why is this an important issue?**
- **Assessment of Current Market**
- **The Alliance – Role, Principles and Value to the Sector**
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- **The Alliance – Priority Countries, Interventions, Tools and Mechanisms**
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- **The Alliance – Governance, Champions and Structure**
- **Alliance Score Card, Milestones for Success, Risks and Exit Strategies**

# Executive Summary

## Problem

- Every day, 3 billion people (500 million households) rely on solid fuels to power their traditional stoves, leading to 2 million deaths annually, wasted productivity, and environmental degradation.

## Vision

- Universal adoption of clean and efficient cookstoves and fuels.

## Mission

- Save lives, improve livelihoods, empower women, and preserve the environment by creating a thriving global market for clean and efficient cookstoves and fuels.

## Goal

- 100 million households adopt clean and efficient cookstoves and fuels by 2020.

# Executive Summary

- Alliance will develop a comprehensive vision and strategy to address household cooking energy issues at scale. It will also work to ensure a community of aligned and cohesive stakeholders whose actions will enable markets globally and in priority countries.
- Alliance will enable markets through a combination of global, public good interventions (research, standards, testing, raising awareness, advocacy and knowledge sharing) as well as targeted innovation and capacity building support for enterprises along the value chain.
- Alliance has taken a portfolio approach to prioritizing its countries with consideration to size, impact, market maturity, innovation, need and partner commitment. Initial set of priority countries include Bangladesh, China, Ghana, Kenya, Nigeria and Uganda. It is likely that the Alliance will add up to an additional four countries from the following – Cambodia, Ethiopia, Guatemala, India, Indonesia, Mexico, Nepal, Peru, Rwanda, Tanzania and Vietnam.

# Executive Summary

- Alliance will carefully utilize public and private *grant funding* to leverage substantial investment capital , likely \$3.5b annually through 2030 to ensure full and universal adoption.
- Alliance has a three phased approach and strategy to achieve its goals of 100m by the year 2020, with the scaling up of production and adoption likely to begin in Phase 2 and continue with steep trajectory in Phase 3.
- Alliance will have a small Secretariat of dedicated staff members, an Advisory Council to support strategic direction of the Alliance, a Leadership Council to ensure that the issue and its resourcing remain a priority at the global level and Ambassadors to communicate the message to target audiences.
- Alliance will routinely measure its progress against a Balanced Score Card and adjust its strategies accordingly.

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# The Problem

**3 billion people dependent on traditional stoves**

**2 billion tons of biomass burned each year**

**Exposure to air pollution typically up to 100 times more than recommended as healthy by WHO**

**2 million people die annually**

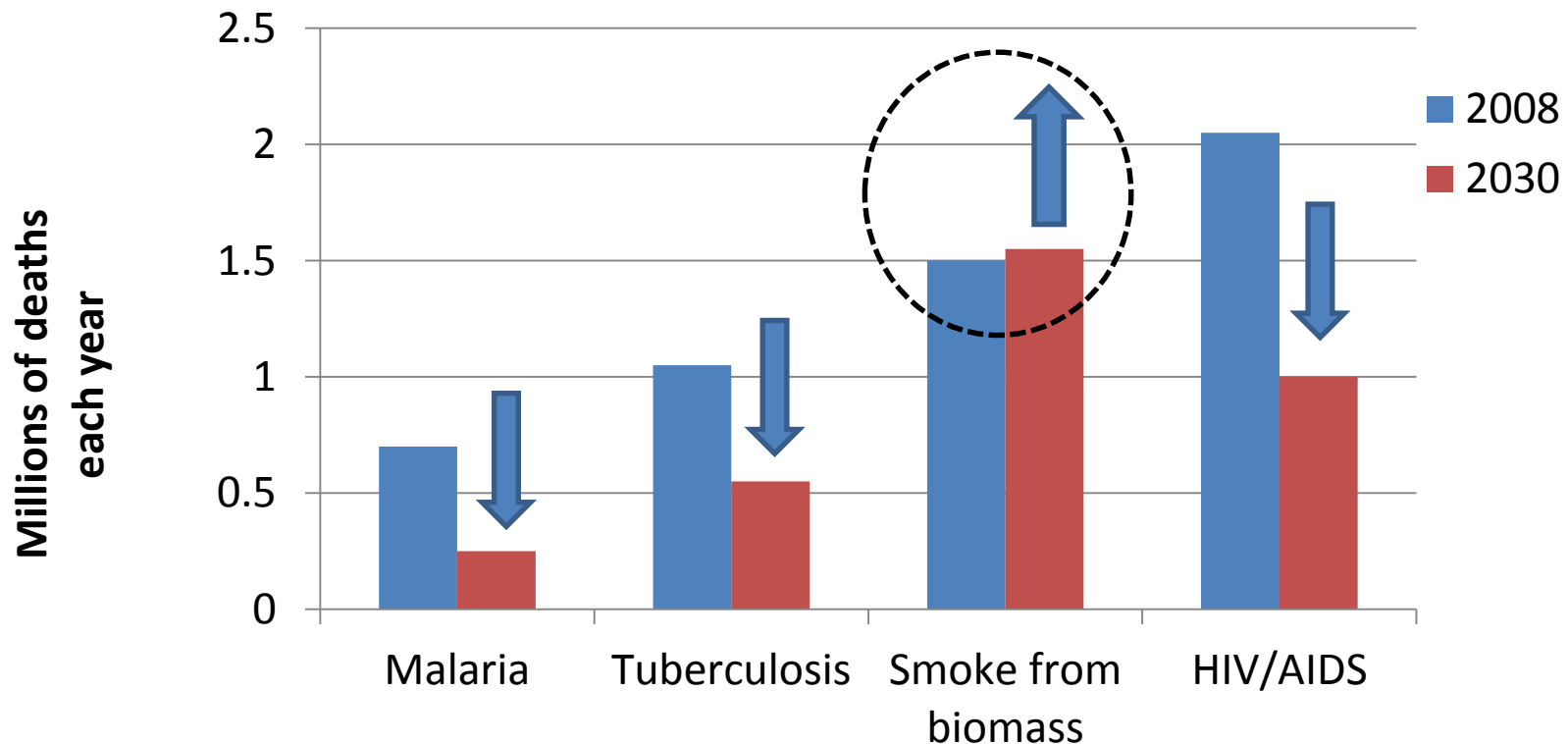
**Up to 40% of household income spent on fuel**

**Up to 5 hours a day spent on collecting fuel**

**Women and children disproportionately impacted**



Deaths from exposure to cookstove smoke are larger than deaths from HIV/AIDs, tuberculosis, and malaria – and are rising.





# Women and girls can spend up to eight hours a day on chores related to cooking.



**Women and girls spend up to three hours per day preparing meals, risking burns and often breathing in smoke that causes deadly health.**

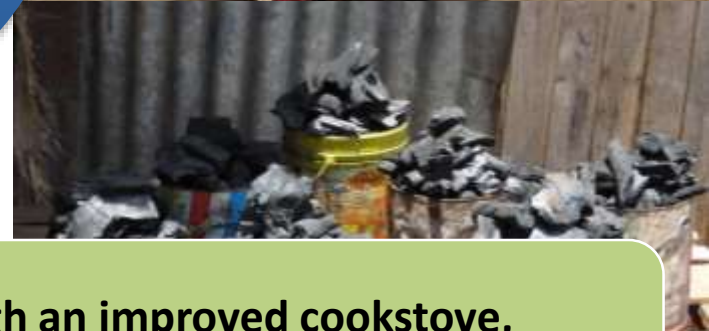
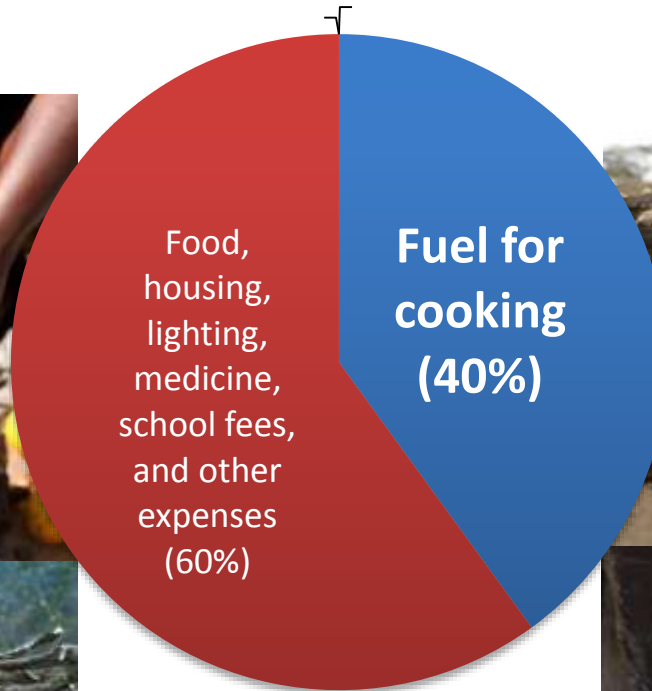


**Women and girls carry up to 70 kg of wood, and spend up to five hours per day collecting fuel, facing risks of head and spinal injuries and potential attack.**

**With 50% more time available from using more efficient cookstoves, women would have the equivalent of more than 60 free days every year to work or care for their families.**

**Up to 40% of household income for those at the base of the pyramid is spent on fuel alone.**

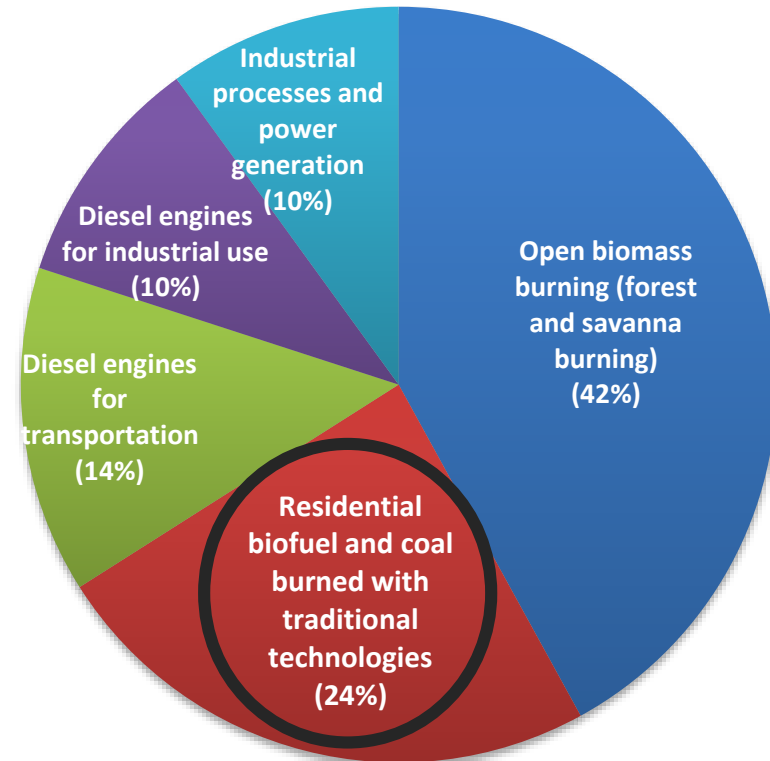
## Household expenditures



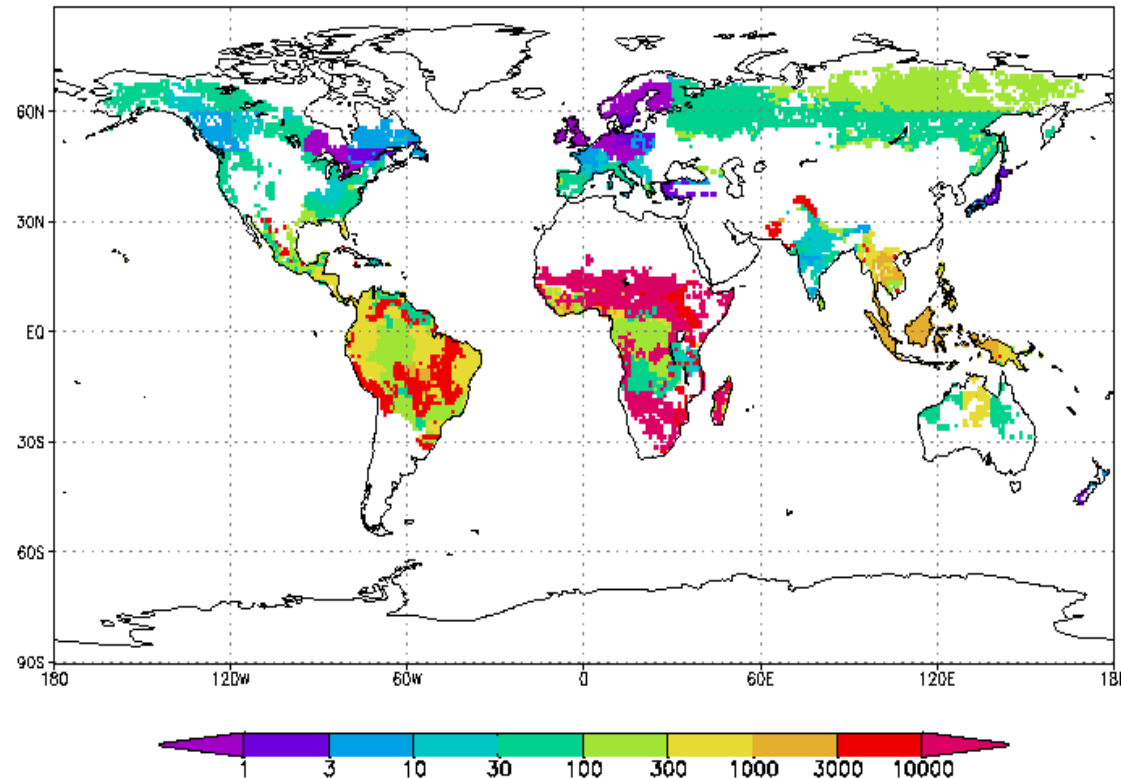
**With a 30% increase in efficiency of fuel use through an improved cookstove, a family could send two children to school.**

# One quarter of global black carbon emissions are from cookstoves.

Global Sources of Black Carbon Emissions



Black Carbon Emissions from Burning Biomass  
(tonnes/1°x1°)



**Over its lifetime, a single improved cookstove could avoid more carbon dioxide emissions than a car being taken off the road for a year.**



# Clean cookstoves are a tangible solution.

Going from open fires or traditional cookstoves to cleaner cookstoves and fuels will lead to:



Less exposure to toxic smoke

Fewer burns and other injuries

Less income spent on and time  
needed to collect fuel

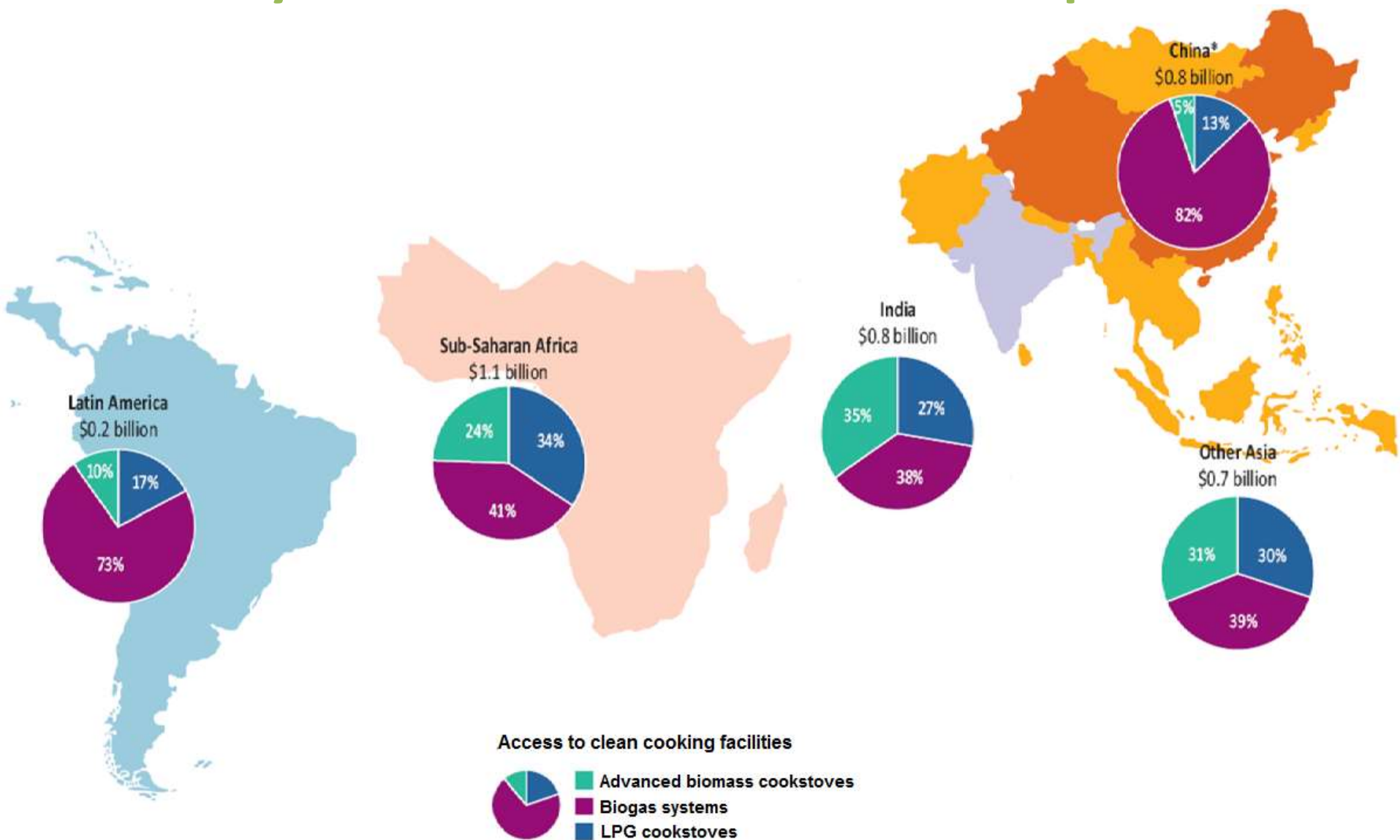
More time for education and  
income-generating activities

Reduced greenhouse gas  
emissions and deforestation



**saving lives, improving livelihoods, empowering women, and preserving the environment.**

# Investment of \$3.5b annually will be required to catalyze the market and ensure adoption.



Map is not to scale

World: 3.5 billion

Note: investments are expressed in year-2012 dollars

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# Innovation and technology have provided the sector with a variety of stove solutions.

## Traditional Stoves



## Improved Stoves and Fuels



## Advanced Super Clean Stoves and Fuels



More options and technologies in development

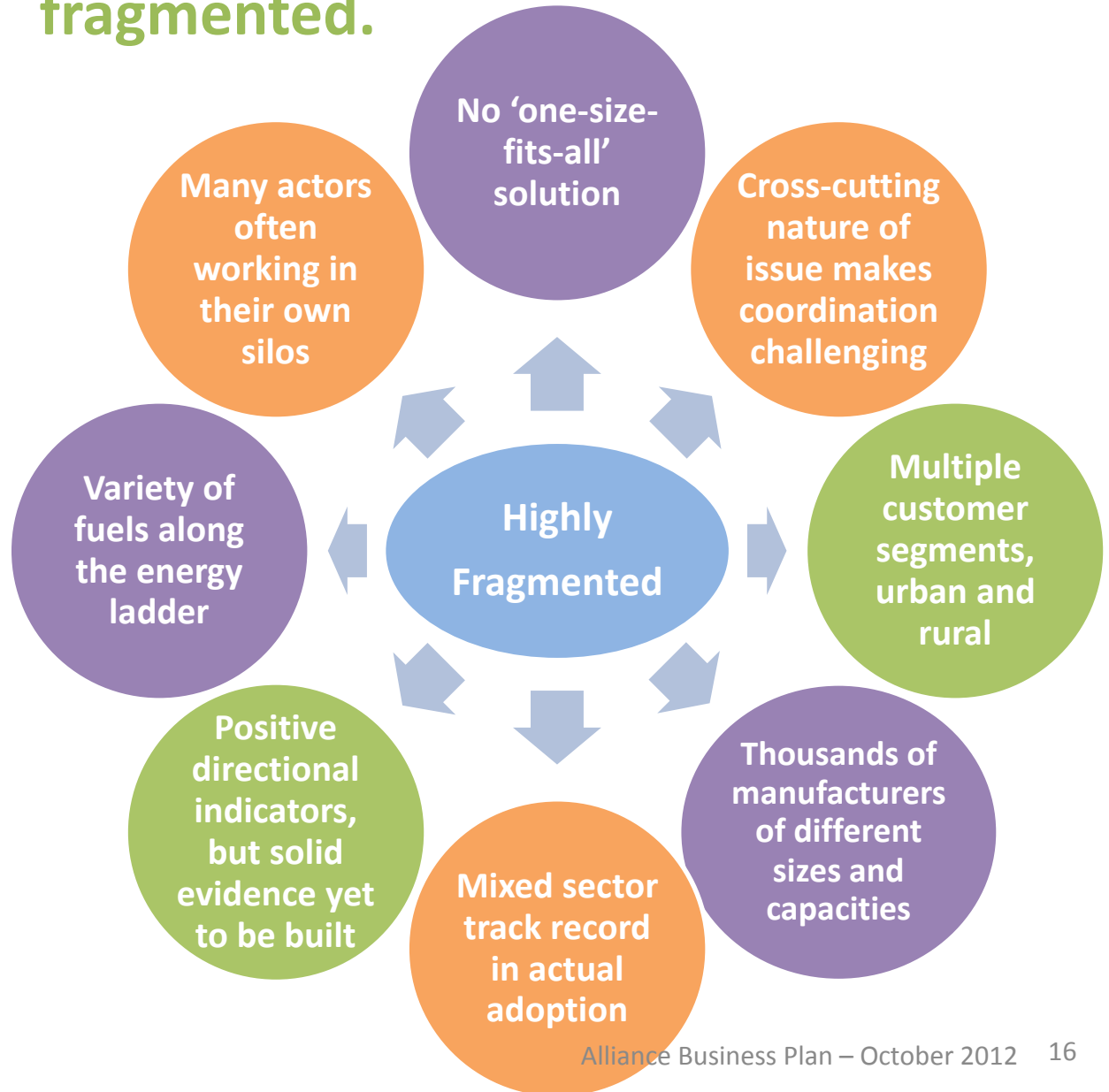
Constant Quality Improvement



**While there is a foundation to build on ...**

- At least 2 million improved stoves sold last year
- Decades of cookstove implementation experience
- Hundreds of active stove organizations

**the market today remains fragmented.**





# Barriers have been identified for each stakeholder...

## Consumers

Lack awareness about risks of exposure to cookstove smoke and availability and benefits of clean cookstoves. Many stoves do not meet local cooking needs.

## Distributors and Retailers

Lack working capital and struggle to identify economically-viable models for distributing stoves and delivering after-sales services to remote rural customers.

## Designers and Manufacturers

Lack adequate capital for R&D and facilities. Limited market intelligence on needs, size of market, etc. Tariffs and taxes prohibitive in some circumstances.

## Researchers

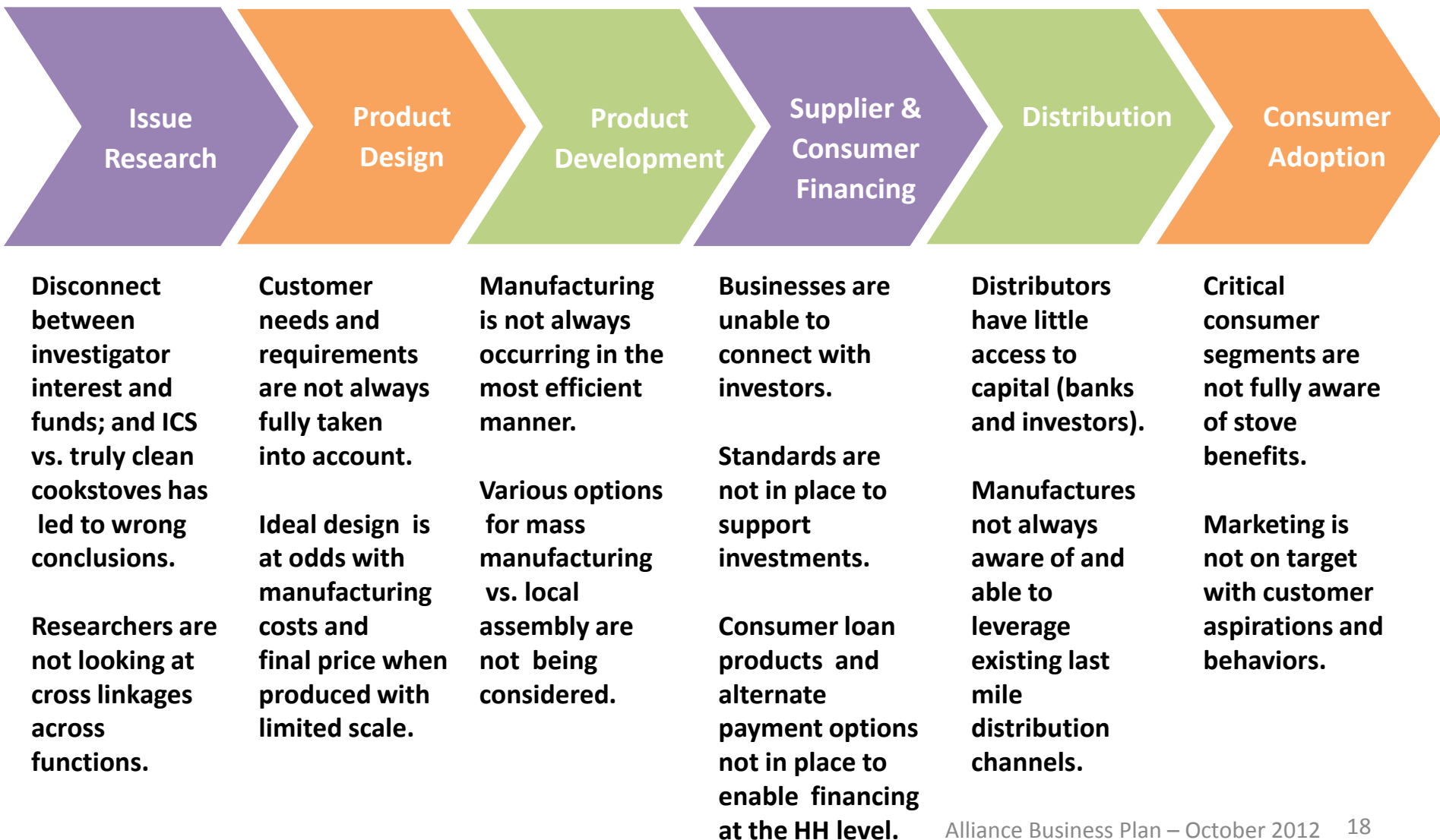
Lack of coordination amongst cookstove researchers. Disconnected with donors interested in cookstove issues.

## Donors

Lack of awareness of the magnitude of the issue, 'time is right' changes in the sector, lack of cohesive strategy and tangible means of addressing the issue, and the need develop the evidence base in support of the issue.

No globally recognized cookstove standards

## and there remain inefficiencies along the supply chain ...



# But, the timing could not be better to achieve global scale.

## Macro- Environment

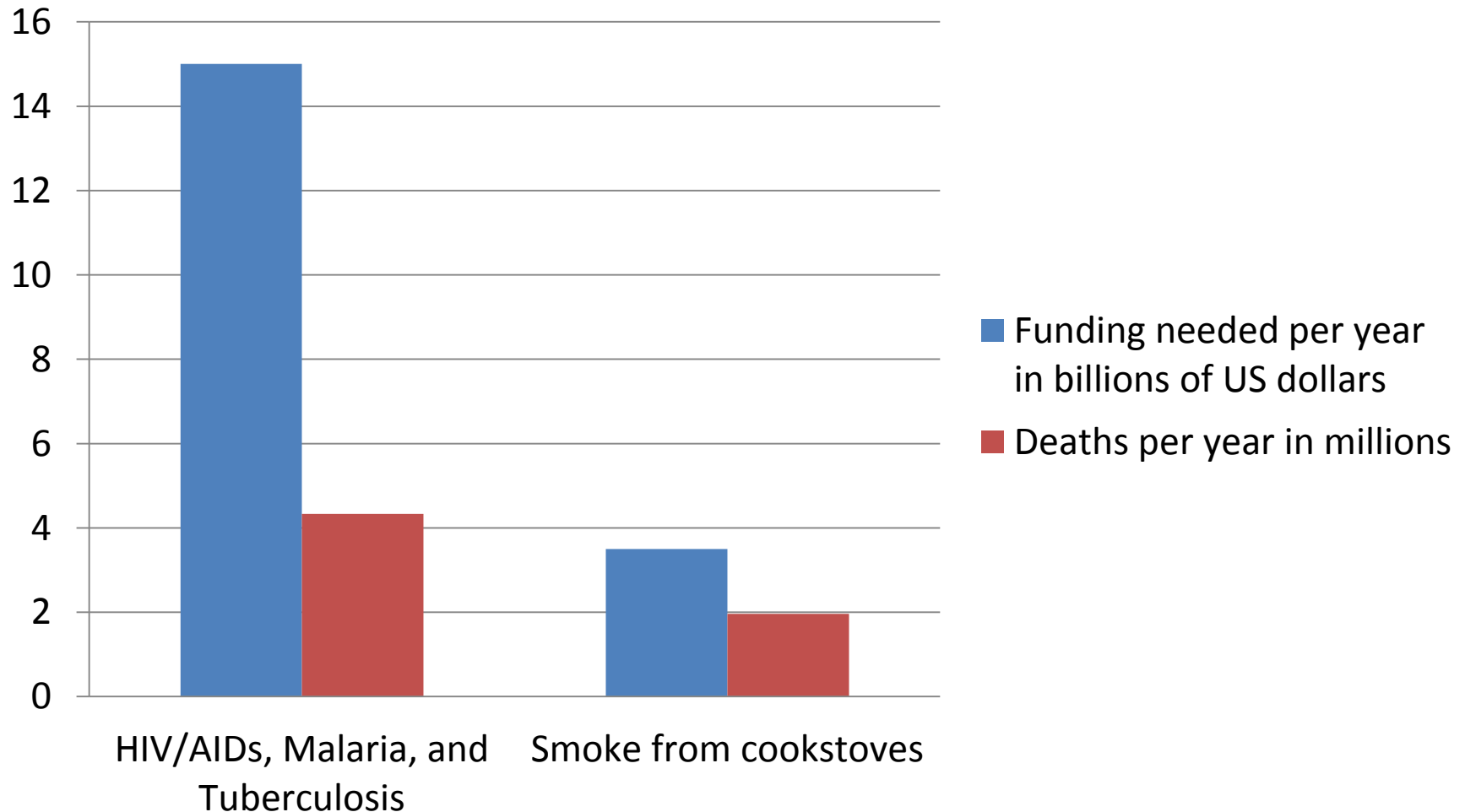
- Multinationals are interested in developing markets at the base-of-the-pyramid (BoP).
- Rapid urbanization is forcing more people to buy fuel, with prices rapidly rising, alternatives are being sought.
- Increasing levels of consumerism at BoP are making cookstove purchases more viable.
- Growth of SME around the world contributing to thriving local communities and development of products that meet local needs/cultures.

## Cookstove sector

- Continuously improving stove technologies.
- New business models and international market entrants are showing successes at increasing scale.
- Availability of innovative finance, e.g. carbon finance, microfinance, social capital, etc.
- Stronger empirical evidence is demonstrating the health and environmental benefits.
- Renewed interest among governments in impacted countries and growing policy focus on short term climate forces such as black carbon.

A thriving global market for clean cookstoves and fuels is the most customer-oriented, efficient, and sustainable approach to ensure long term adoption.

**And the impact per \$ invested could be double that of HIV/AIDs, Malaria and TB.**



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## The Alliance

*The Global Alliance for Clean Cookstoves was launched by Secretary Hillary Clinton and is an innovative public-private partnership to create a thriving global market for clean and efficient cookstoves and fuels.*



Photo credit: Clinton Global Initiative

## Alliance will drive the sector to ensure that 100M households adopt clean cooking solutions by the year 2020.

- Develop a comprehensive vision and strategy to address household cooking energy issues at scale.
- Ensure an aligned and cohesive set of stakeholders and actions to enable the market globally and in priority countries.
- Generate awareness of the issue at the community and household level to ensure sustained adoption by consumers, and the global and national levels by high-level policy makers, donors, and private sector players.
- Raise more resources, grants and investment, for the sector, on par with other comparable risks and issues (e.g. lack of electricity, clean water, malaria, HIV/AIDS, TB).
- Coordinate, and use a test-and-learn approach, to arrive at a wide-range of solutions to address complex barriers and inefficiencies.



# The Alliance convened the sector to develop a cohesive strategy to ignite change.

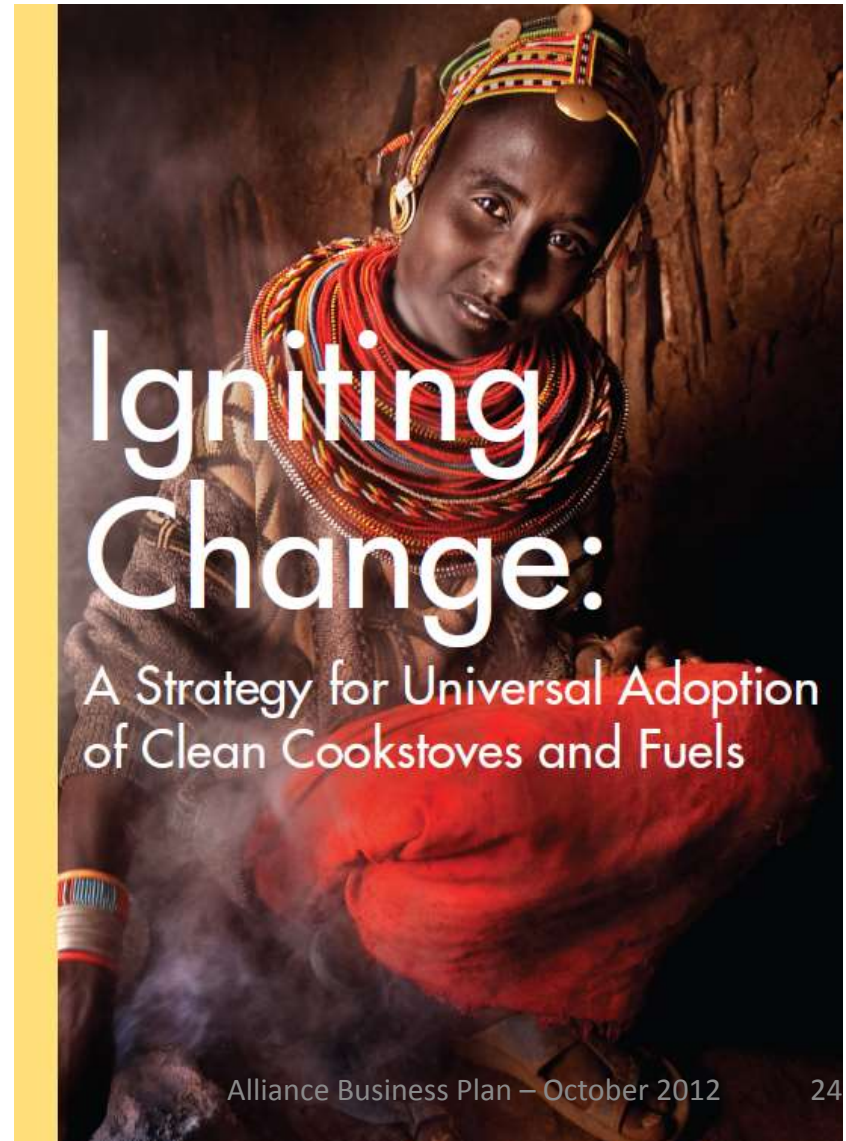
*More than 350  
practitioners and other experts*

*11 expert Working Groups*

*6 months of engagement*

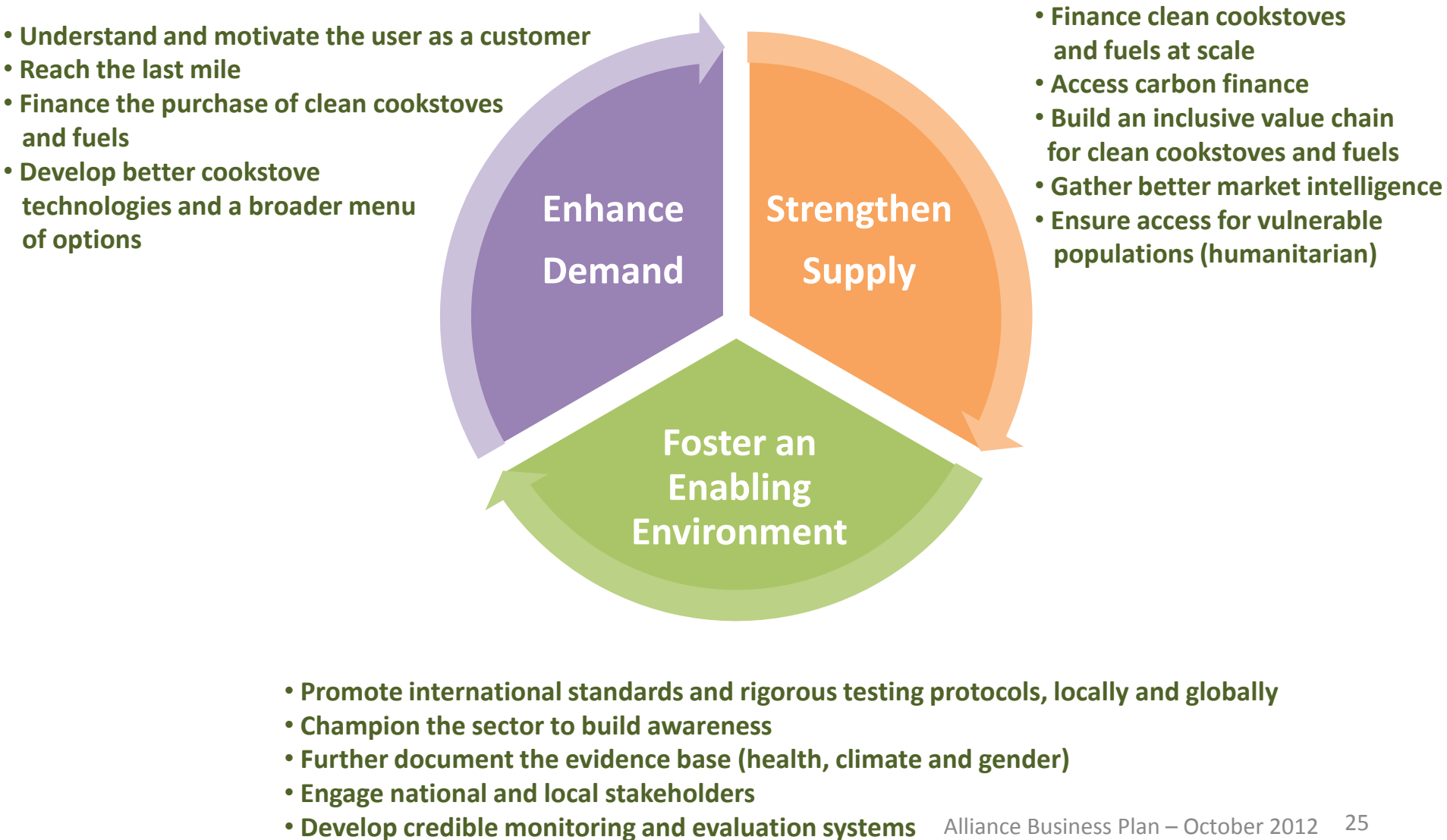


*Strategy report released  
in November 2011*





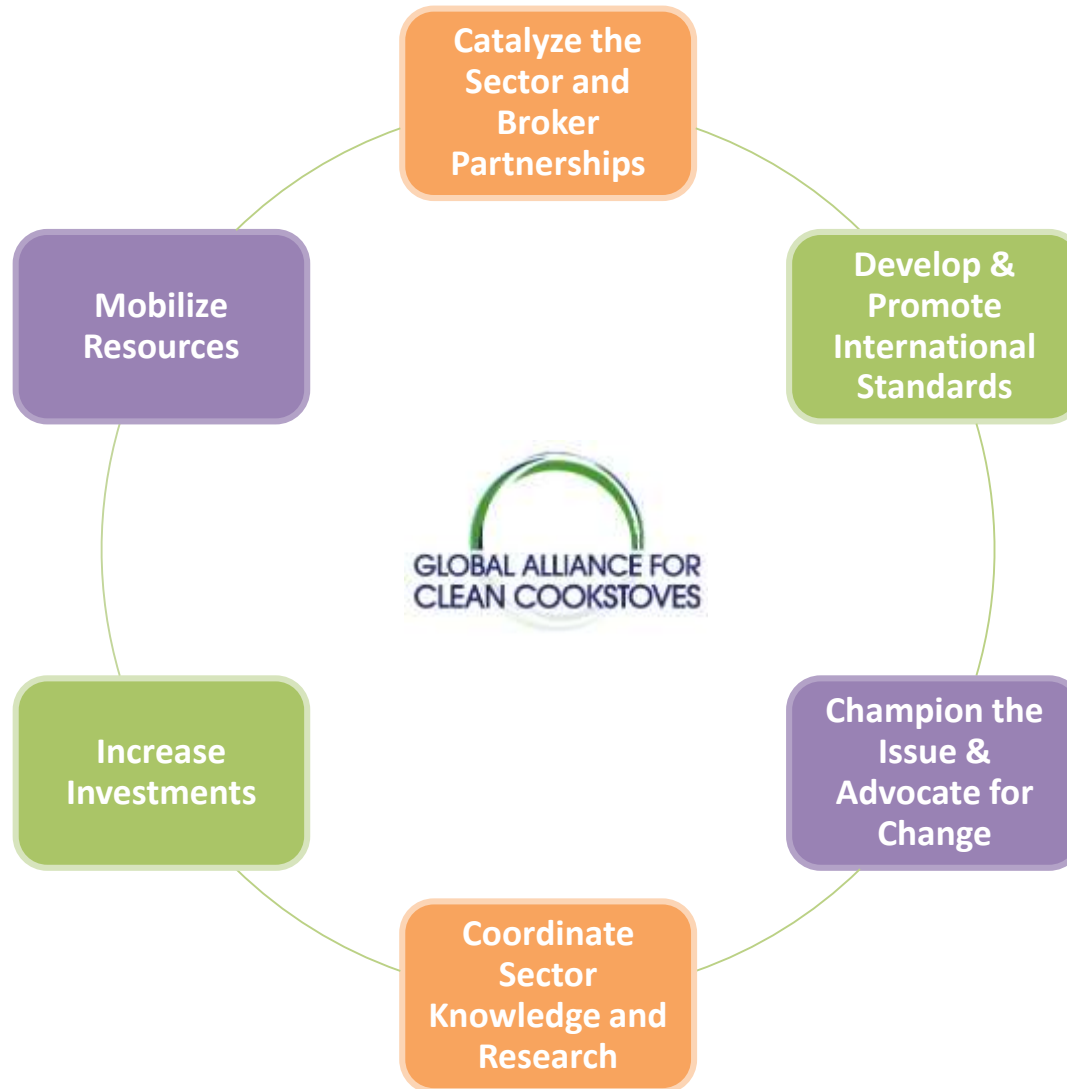
# A three-pronged strategy has been developed to spur the clean cookstove & fuel markets.



# The Alliance will operate under a clear set of principles.

- Focus on high quality approaches that can be brought to **scale**
- Be technology and fuel neutral – but gradually drive **solutions and markets towards advanced or super-clean options**
- **Build** on the ongoing tremendous work, knowledge, and expertise of our partners within the sector **without reinventing the wheel**
- **Consumers and users** will be at heart of our efforts
- Bring **new partners** and donors to the table, while extending engagement of existing partners
- Foster a **market-based** approach (without directly selling stoves) to reach and sustain scale, while also ensuring that **vulnerable populations** have access to clean cooking solutions

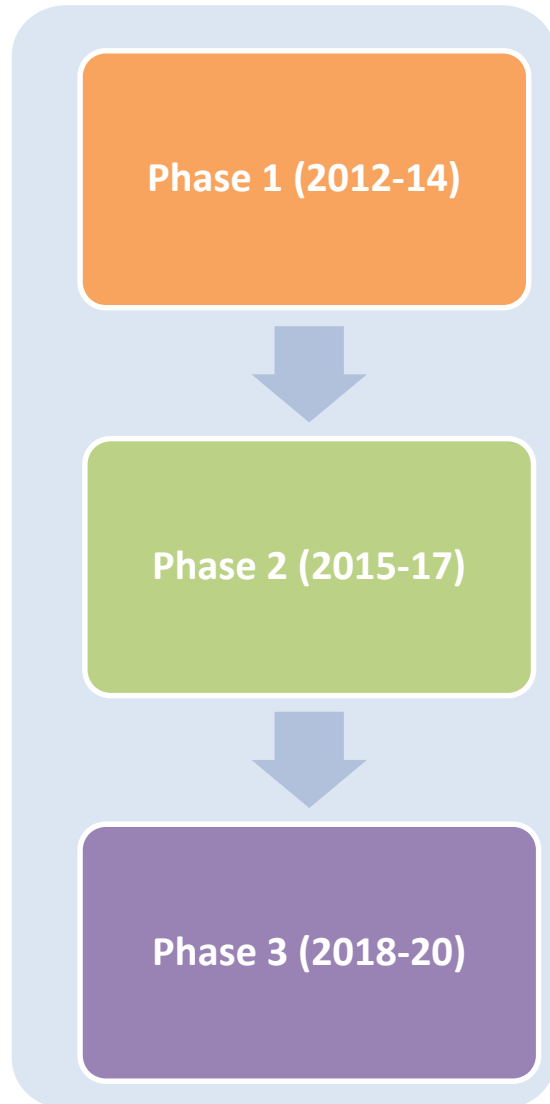
# The Alliance has six global value propositions to enable development of cookstove and fuel markets.



# The Alliance will work with and through its diverse and growing base of partners.



# The Alliance will utilize a three-phased approach to achieve its goals.



*Launch global and in country efforts to rapidly grow the sector*

*Drive investments, innovation, and operations to scale.*

*Establish a thriving and sustainable global market for clean cookstoves and fuels*

# The Alliance has distinct priorities across the three phases.

## Phase 1 (2012-14)

- Develop and implement globally-recognized stove guidelines/standards.
- Begin market enabling activities in priority countries (early action and longer-term interventions).
- Commence on the ground research efforts to identify a correlation between clean cookstoves and effects on health, environment, livelihood and women's empowerment.
- Support capacity building of organizations with potential to scale.
- Increase number of investors and resources to support scale up adoption in priority markets.
- Pilot a variety of last mile distribution and consumer finance models using a test and learn approach.
- Increase the number of organizations engaging in the issue.
- Establish a robust monitoring and evaluation system for the sector.
- Launch humanitarian efforts
- Develop mechanisms to share practices

## Phase 2 (2015-17)

- Refine strategies and scale up support to rapidly grow markets in priority countries.
- Fully capitalized funds and a variety of investment derisking instruments that support growth needs for organizations in the sector
- Share lessons learned in effort to prioritize additional 2 to 5 countries.
- Drive development of and adherence to internationally-recognized ISO cookstove standards.
- Deliver research that continues to demonstrate the health, climate, livelihood, and gender benefits of clean cookstoves and fuels.
- Advocate priority governments scale up their efforts by creating favorable regulatory and policy environments.

## Phase 3 (2018-20)

- Promote clean cookstoves and fuels so they become a recognized mainstream global health, gender, livelihood and climate intervention (with funding on par with other major global issues).
- Attract significant investment (social and increasingly commercial) into the cookstove space.
- Catalyze and support increasing numbers of private sector players along the cookstove value chain selling high-quality stoves at scale.
- Replicate successful market enabling activities across numerous impacted countries.
- Ensure 100 million goal attained and clean cookstove programs operating across 50 countries.

# This phased approach will allow the Alliance to reach its 100 million goal by the year 2020.

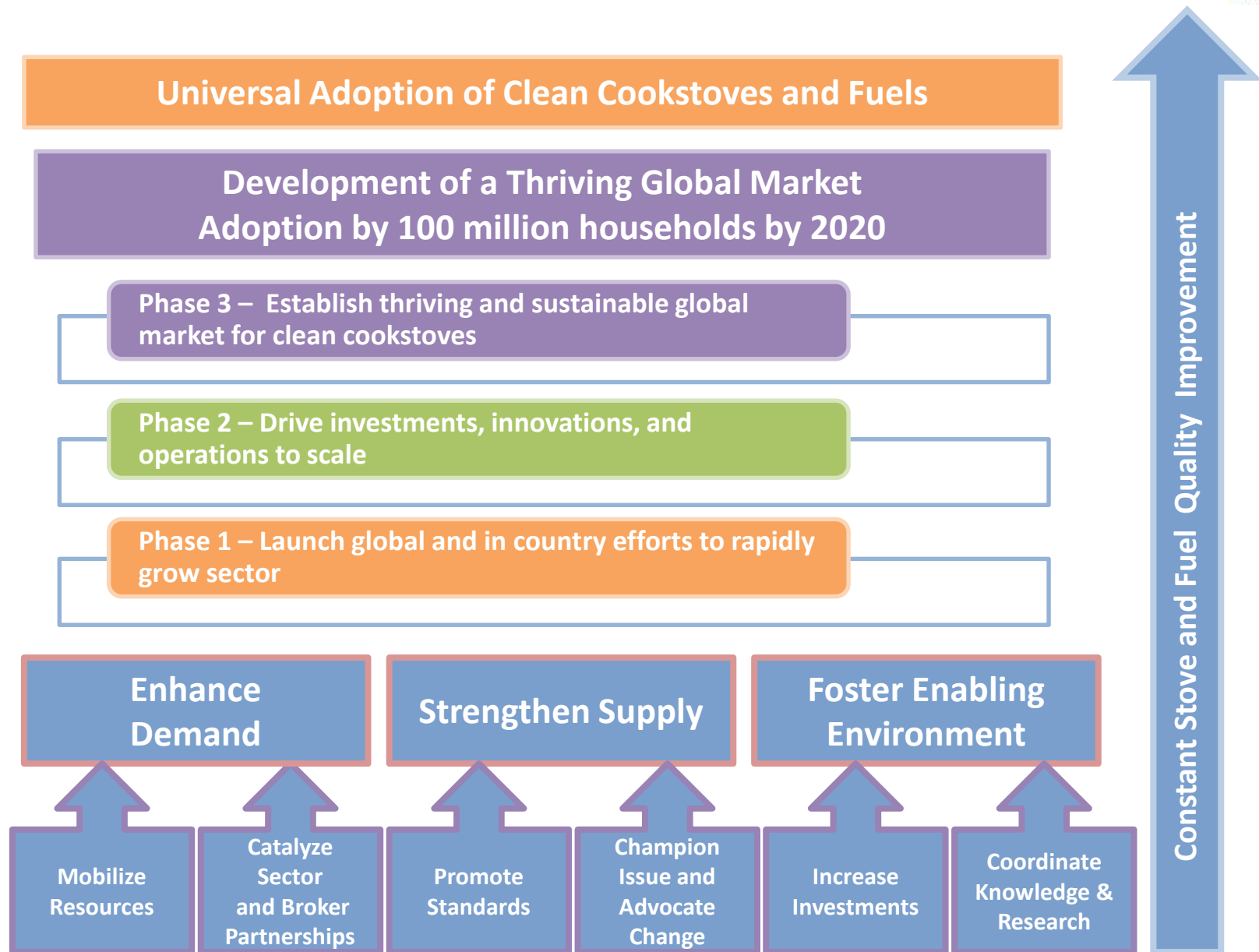
# households that buy and use (in millions)	2011	Phase 1			Phase 2			Phase 3			Total
		2012	2013	2014	2015	2016	2017	2018	2019	2020	
1st stove	2	3	4	5	7	9	12	15	19	24	100
2nd stove				2	3	4	5	7	9	12	42
3rd stove							2	3	4	5	14
4th stove										2	2
<b>Total # stoves adopted</b>	2	3	4	7	10	13	19	25	32	<b>43</b>	<b>158</b>

Constant Quality Improvement

## 158 million clean cookstoves will have to be adopted between now and 2020.

- This assumes a three-year average stove life-cycle and a stove sector in which most of its growth occurs in 2015-2020. Stove life-cycles vary from a few months to 7 years, but 3 years is a reasonable average. Sector growth rate is based on a survey of major stove businesses conducted by the Alliance in June 2011.
- Also assumes that the humanitarian sector is a significant purchaser of clean cookstoves when addressing humanitarian situations.

# The Alliance's Theory of Change





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# The Alliance will have to be transformative, yet pragmatic to achieve its goals.

## Challenge

### Holistic Approach Required

To drive stove  
adoption, many  
barriers and  
inefficiencies need  
to be addressed  
simultaneously, not  
one-at-a-time.

vs.

### Limited Resources

The Alliance and  
its partners have  
limited financial  
and non-financial  
resources.

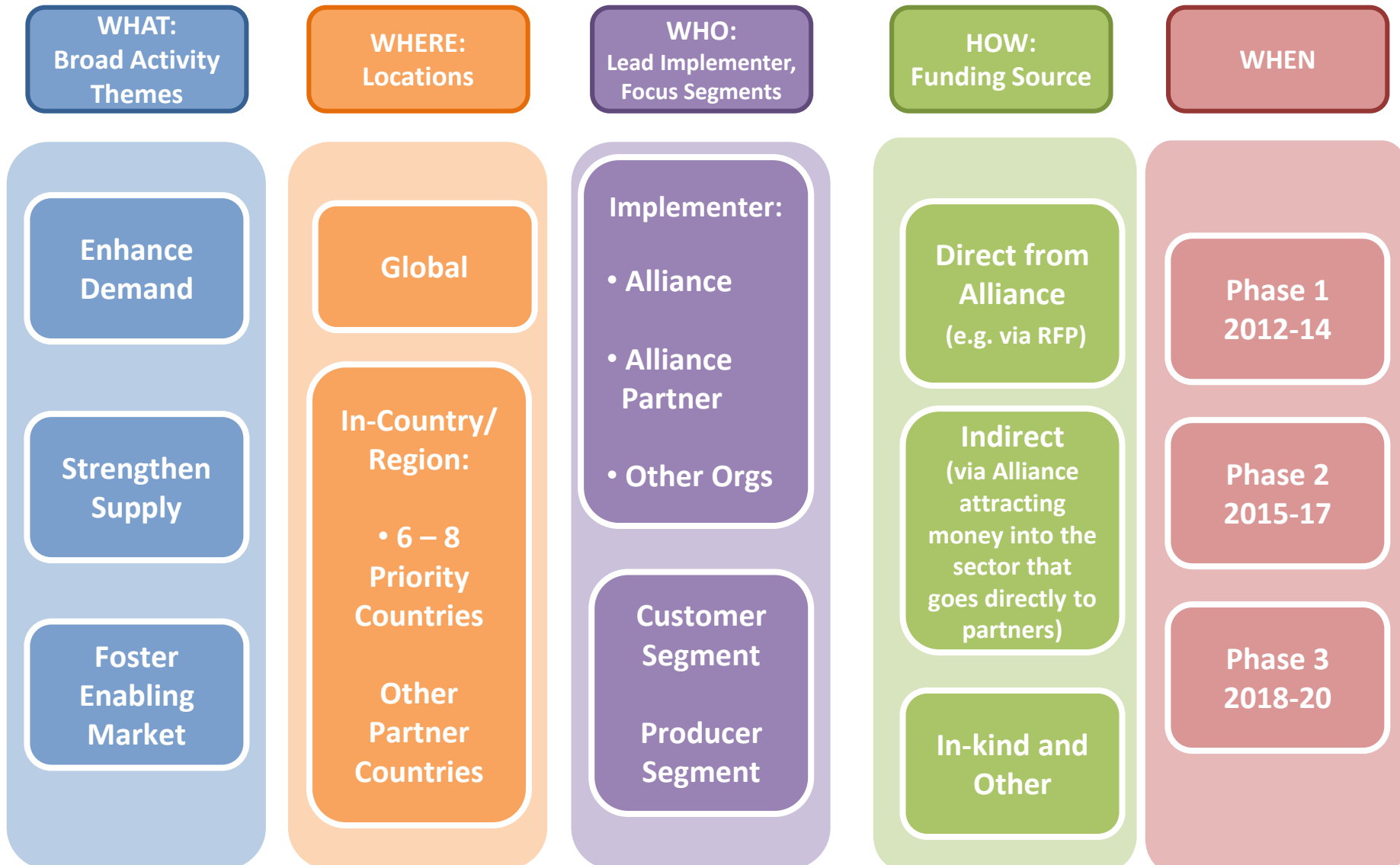
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## Solution

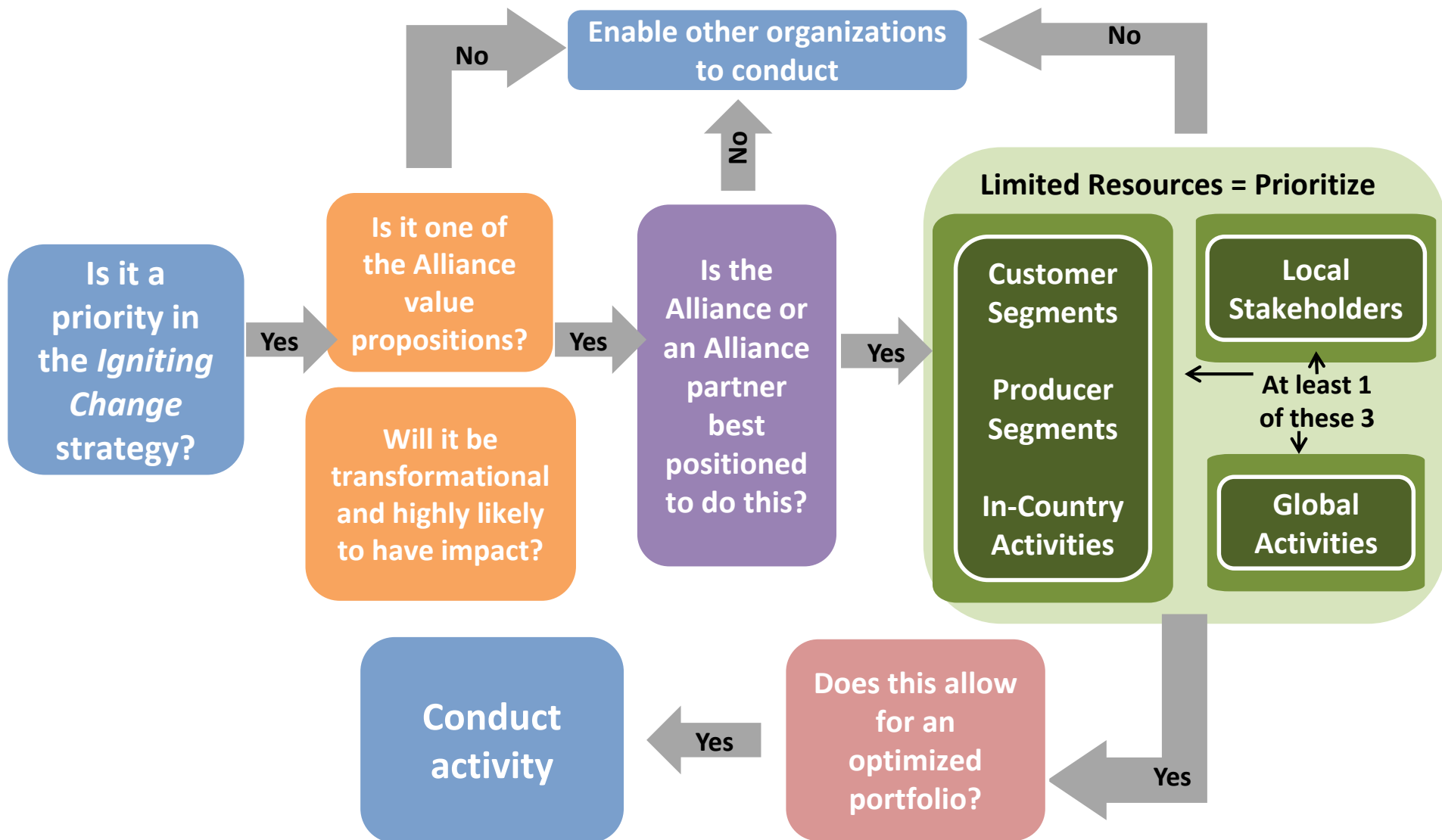
### Prioritization of:

- Global and Local Interventions
- Countries
- Customer and Producer Segments

# Alliance activities will be focused and targeted for high impact.



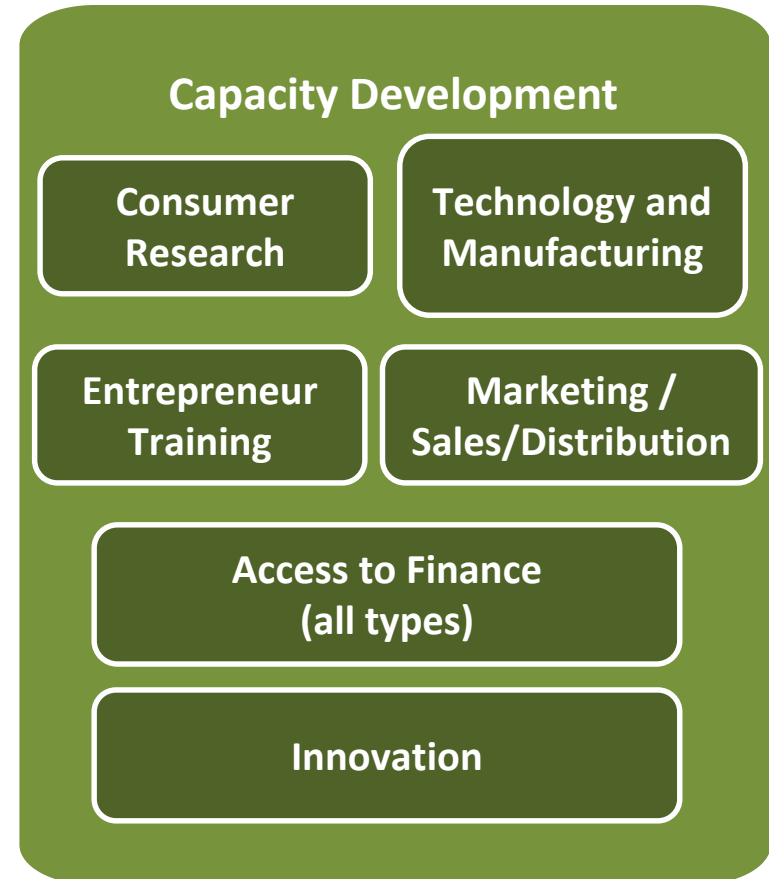
# The Alliance will apply a robust decision making process to determine actions it will undertake.



# The Alliance will deploy a two track approach to enable markets in priority countries.



***Activities for the public good that benefit the entire sector***

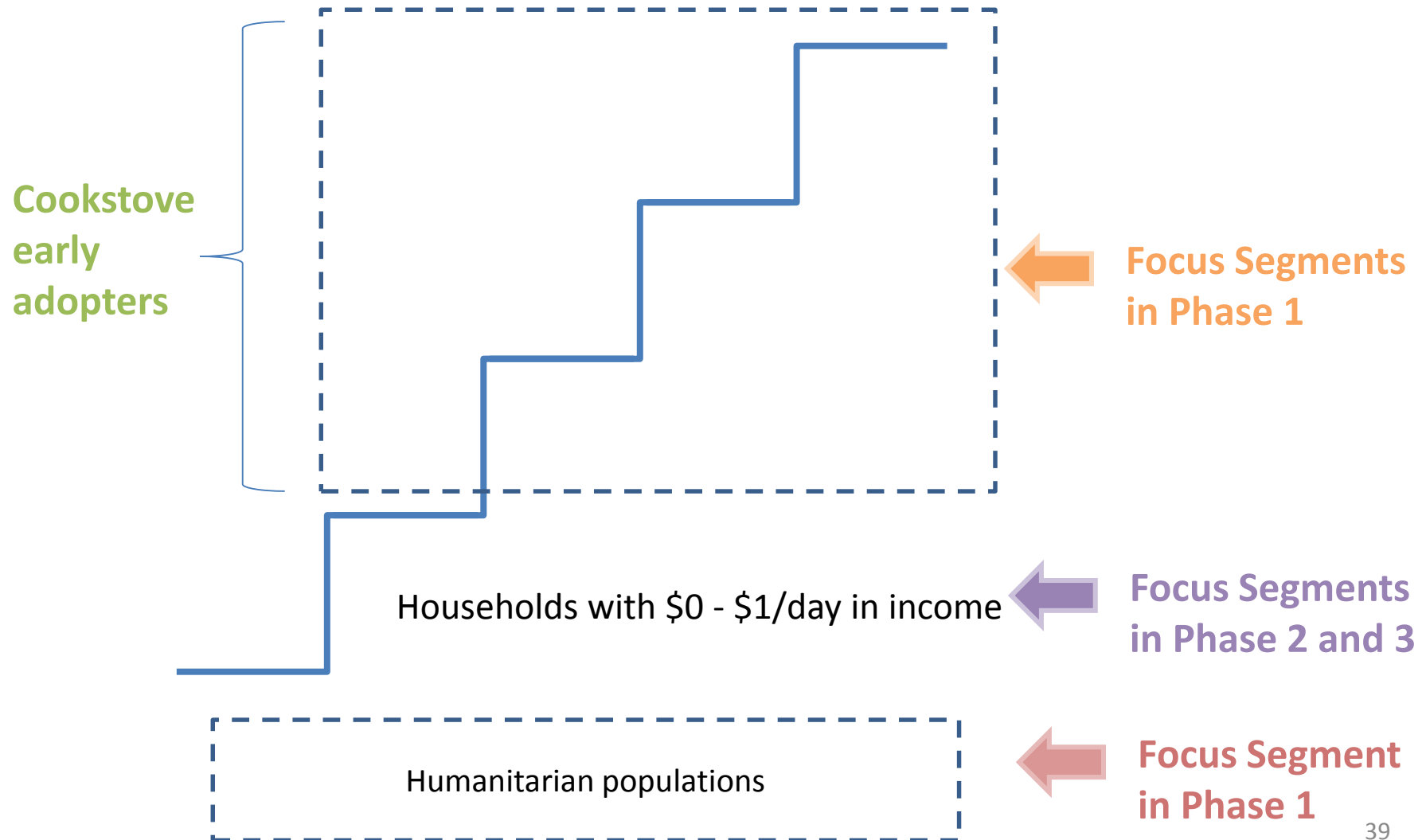


***Tailored support that focuses limited resources on driving scale***

# A robust data driven approach has been utilized to prioritize countries for Alliance engagement.

<p><b>Potential Impact</b> (25%)</p>	<ul style="list-style-type: none"> <li>• Health impact (as % of total deaths)</li> <li>• Relevance to other countries (in region and beyond)</li> <li>• Environmental impacts (deforestation, desertification, biodiversity, and air pollution)</li> <li>• Potential indicators for gender/livelihoods</li> </ul>
<p><b>Scalability/Potential Contribution to 100 million</b> (25%)</p>	<ul style="list-style-type: none"> <li>• Households affected</li> <li>• Extent of current market activity (stoves being sold, potential market, etc.)</li> <li>• Structure of potential consumer financing (MFIs, credit unions, etc.)</li> <li>• Political will, governance/flag instability, ease of doing business</li> <li>• Lessons from past or present national cookstove programs</li> </ul>
<p><b>Opportunity to Test Innovative Business Models</b> (25%)</p>	<ul style="list-style-type: none"> <li>• Traditional market-based approach in this sector and others</li> <li>• Active implementing partners</li> <li>• Potential implementing partners</li> <li>• Current national cookstove programs</li> </ul>
<p><b>Leveraging Other Resources</b> (12.5%)</p>	<ul style="list-style-type: none"> <li>• Donor priority/interest</li> <li>• Partner activities</li> <li>• Complementary UN Foundation programming</li> </ul>
<p><b>Greatest Need</b> (12.5%)</p>	<ul style="list-style-type: none"> <li>• % of Solid Fuel Use</li> <li>• Rural Population</li> <li>• Income per day (USD)</li> <li>• Large humanitarian presence</li> </ul>

# The Alliance will focus on customer segments who are likely to be early adopters in Phase 1.



# We envision four priority customer segments.

## Segment 1

Rural and peri urban households that earn > \$2/day, are likely already paying for fuel, and are relatively easy-to-reach (based on the presence of existing stove businesses, population density, access to consumer finance, etc.)

## Segment 2

Urban households spending more than 20% of their daily income on fuel with a focus on those located in regions where fuel production (especially charcoal) is causing high deforestation. Emphasis on movement to cleaner fuels.

## Segment 3

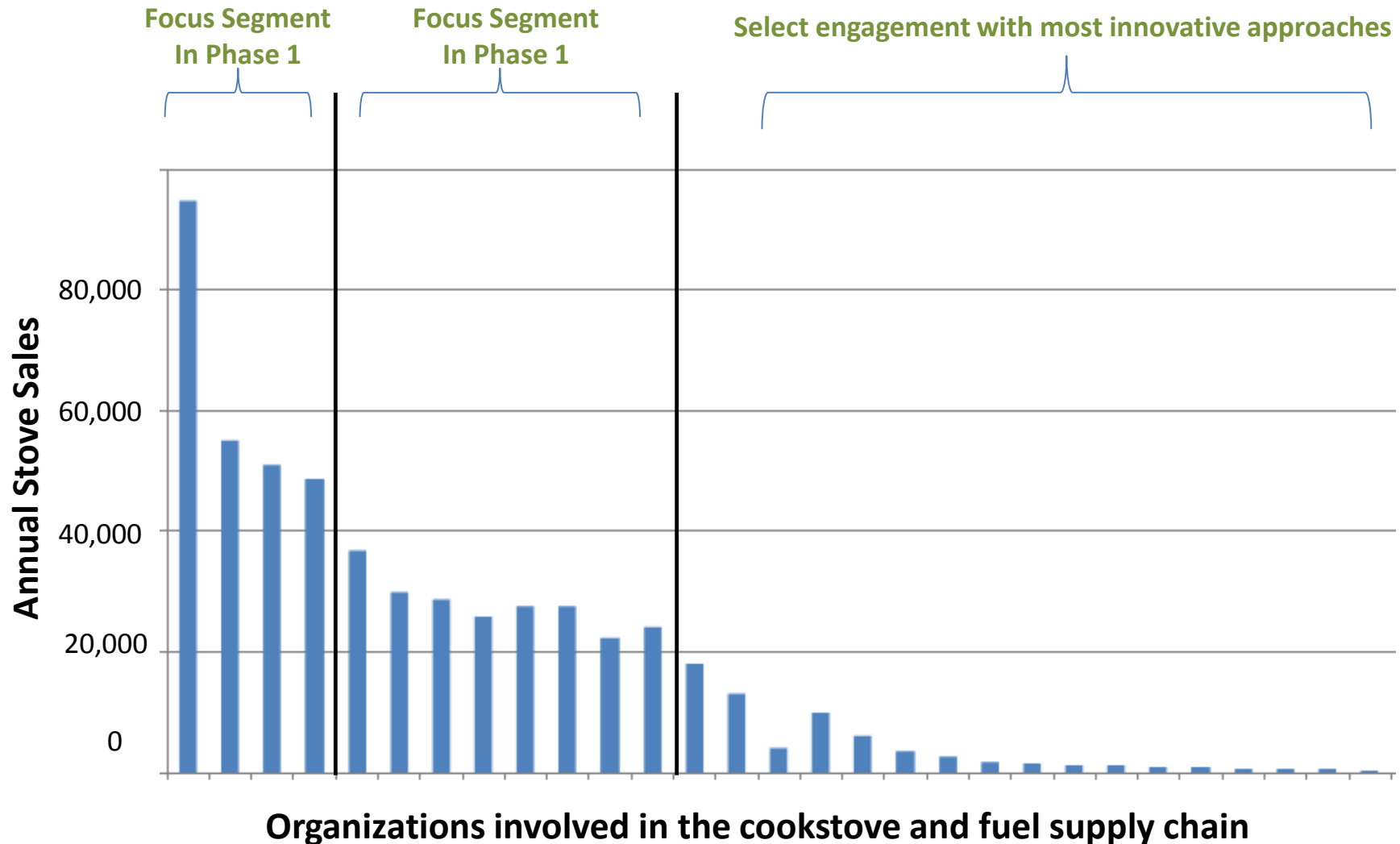
Households that can be reached by adding cookstoves to the portfolios of existing innovative distribution models run by companies, NGOs, membership organizations, and/or microfinance institutions (MFIs)

## Segment 4

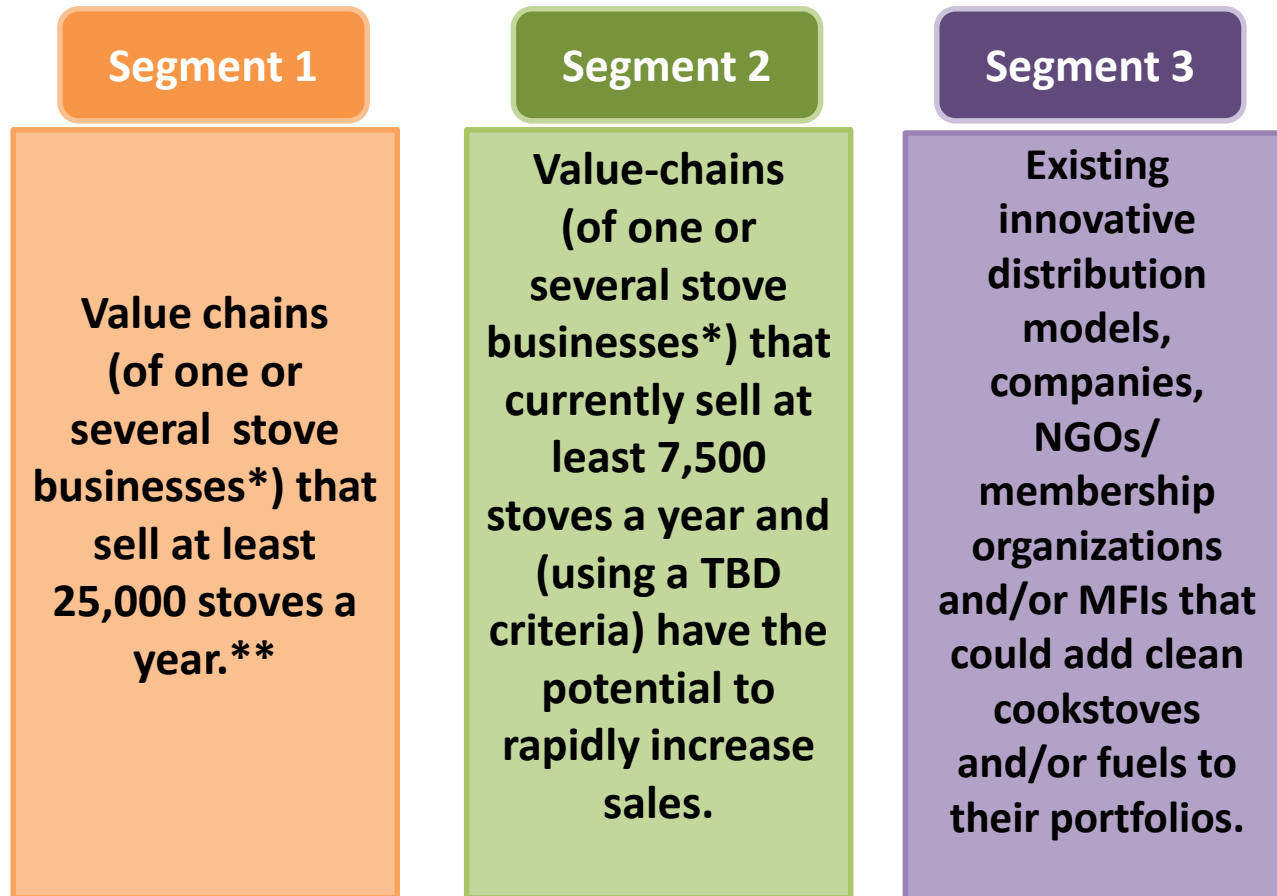
Refugee populations impacted by conflict and disaster. Those populations actively serviced by humanitarian agencies. Will work to develop close partnership with 1-2 UN agencies to support outreach to this segment.



# The Alliance will aim to create thriving markets by focusing on priority producer segments.



# There are likely to be three priority producer segments.



\*Stove Businesses exist along the entire value chain – designers, manufacturers (from artisanal, including liner producers, makers of cladding, assemblers of finished stoves – to factory mass-produced), distributors, retailers, promoters, and installers.

\*\*25,000 is the estimated minimum annual sales required to make carbon finance viable.

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- Ensure 100 million goal attained and clean cookstove programs operating across 50 countries.

*Global Interventions*

# Standards and Testing Strategy to evaluate, communicate and improve performance and adoption

## Develop International Standards

- Formalize and expand standards for cookstoves and fuels, working with national and international standards bodies and multiple stakeholders
- Standardize reporting and labeling
- Implement certification of standards

## Develop and Refine Testing Protocols

- Establish a consensus-based process to develop protocols that address a broad range of stoves, fuels and indicators

## Enhance Global Testing Capacity

- Support a global network of regional testing and knowledge centers
- Establish best practices to standardize results
- Organize and host trainings and workshops to build human capital

# Our ISO Workshop in 2012 made strong progress towards the development of international standards.

- **Multiple performance indicators**  
(Efficiency, Emissions, Indoor Emissions, Safety)
  - Programs can select stoves based on their priorities
  - Demonstrate strengths and weaknesses of each stoves
- **Stepped tiers**  
(Tier 0 to Tier 4)
  - Recognize advances that have been made
  - Set aspirational targets to achieve additional needed improvements
- **Accommodate multiple protocols**  
(“Rosetta Stone” to harmonize protocols)
  - Address multiple stove types and regions
  - Different players can meet regulations and use familiar tests while being able to translate results

## Agreed to definitions now in place for “Clean” and “Efficient” Stoves and Fuels for Phase I.

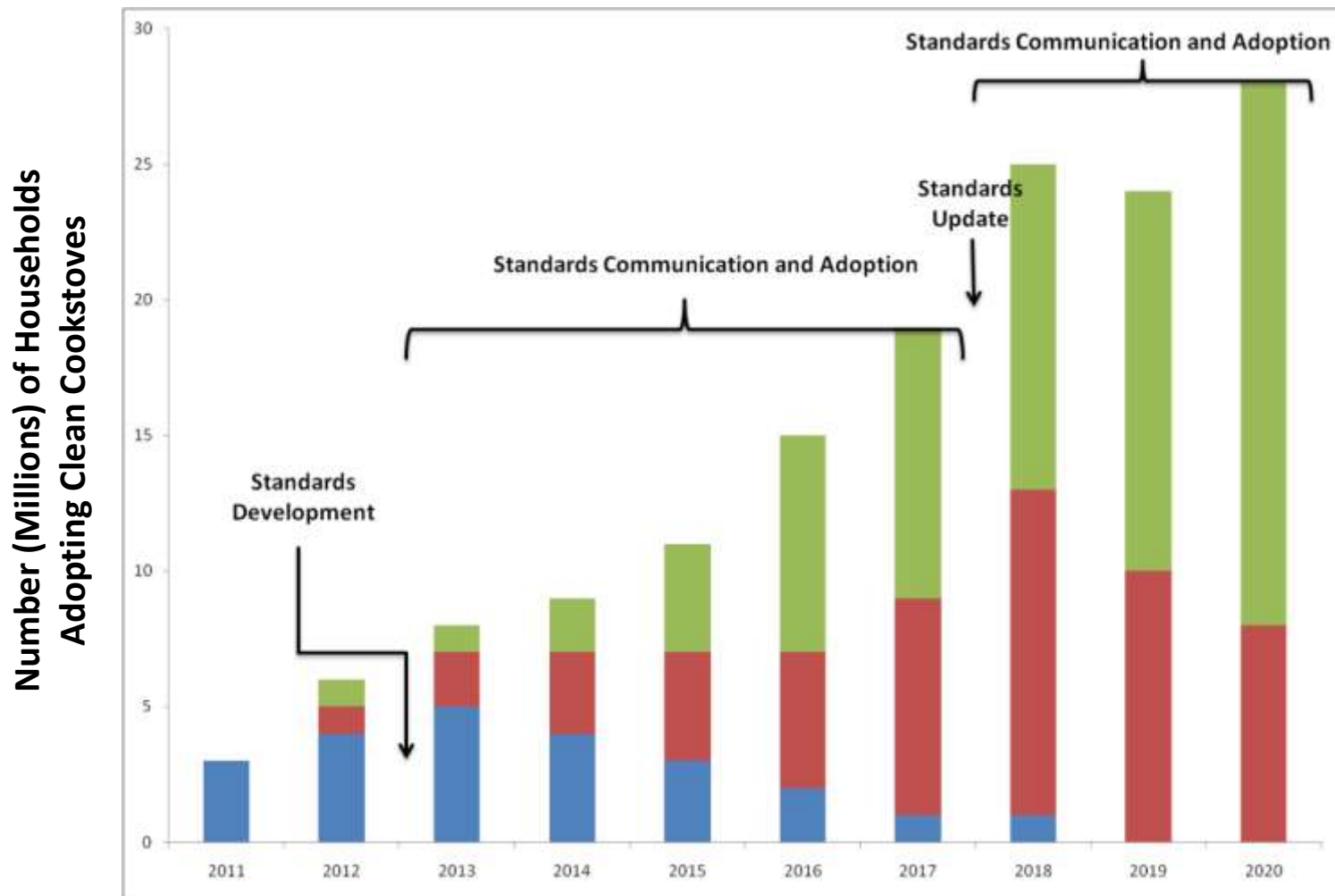
- Efficient
  - Stoves that meet the efficiency requirements for Tier 2 or above will be considered ‘efficient’
  - Sets aspirational target while recognizing that all fuel saved is important
  - Many technologies have progressed to Tier 2 or better
- Clean for the environment
  - Stoves that meet the total emissions requirements for Tier 3 and above will be considered ‘clean for the environment’ and will count towards the 100M target
- Clean for health
  - Stoves that meet the indoor emissions requirements for Tier 3 and above will be considered ‘clean for health’. Existing body of evidence suggests that to achieve powerful reductions in child pneumonia, clean stoves and fuels must have very low indoor emissions.
  - The stoves that are considered clean will be updated based on future research updates.



## Alliance will build a solid evidence base with research that shows correlation between clean cookstoves and improved outcomes.

	Phase 1	Phase 2	Phase 3
Health	child survival and development		
	burns surveillance		
	noncommunicable diseases		
	understudied diseases of public health relevance (TB, adult		
			measuring impacts
Environment / Climate	mapping of nonrenewability of		
		modeling of greenhouse gas emissions from	
	research on net climate forcing of		
			measuring impacts
Women's Empowerment & Livelihoods	opportunity cost impacts and women entrepreneur adoption impacts		
	case studies and best practice		
	strategic pilots testing innovative approaches		
			measuring impacts
Humanitarian	impacts for refugees, IDPs, and vulnerable people		
	pilot testing and measuring best practice		
			measuring impacts
Adoption and Markets	social marketing for increasing consumer awareness and		
	Adoption Research		
	Attracting Social Investment		
	Driving innovation and enterprise development		
			measuring impacts
Standards and Testing	Testing protocols		
	Research and standards meetings		
	Lab and field testing		
	Developing online stove performance inventory		
	Social, behavioral and market research		
			measuring impacts
Fuels and Technology	benefits, impacts and costs of different fuel options		
			measuring impacts

# The Alliance will aim to reach its goals through continuous quality improvement.

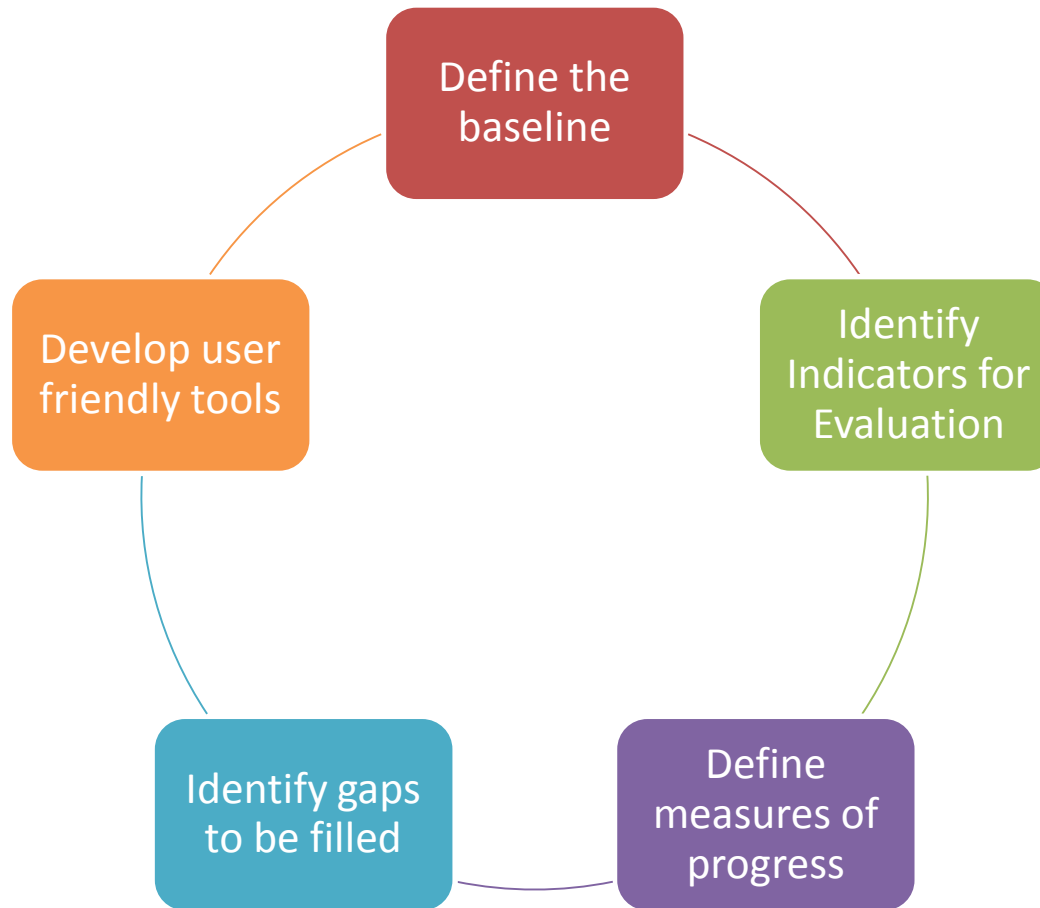


\*Numbers of different stove types and different levels of improved cookstoves in chart are illustrative only

- efficient, ultra low emission stoves
- efficient, low to moderate emission stoves
- efficient, moderate to high emission stoves

Alliance Business Plan – October 2012

**The Alliance has a five step approach to monitoring the number and impact of clean cookstoves.**



# The Alliance will champion the issue to bring new partners to and strengthen connections between existing partners in the sector.

## Core Communication Objectives

- Position the Alliance with key global audiences and target audiences in select countries;
- Raise public awareness about the impact of the problem:
- Shift narrative from narrow to cross-sector, from fatigue to momentum & opportunity;
- Communicate value-add of Alliance as a convener and catalyst for scaling up;
- Communicate the results of research conducted by Alliance and facilitate knowledge sharing.

## Target Audiences Over Time

- Opinion makers and influencers
- Donors
- Practitioners and Entrepreneurs
- Policy Makers in Priority Countries
- General Public
- Consumers and Users

## Messengers/Channels

- Leadership Council
- Advisory Council
- Steering Committee members
- Ambassadors
- Global and local press
- Social media

# Humanitarian engagement is both critical and market enabling.

## Research

- Comprehensive mapping in coordination with UNHCR and WFP
- Research on GBV and other impacts



## Innovative Partnership

- Convene manufacturers and humanitarian experts to figure out most appropriate technologies and how to act on large procurement needs
- Convene carbon finance and humanitarian experts to figure out how to leverage



## Capacity Building

- Develop strategy to allow for large procurements of stoves in crisis that meet specific standards
- Understand requirements from humanitarian agencies
- Set a standard
- R&D to develop appropriate stove types



## Tool Distribution

- Interactive map online
- QAQC best practices
- WFP handbook
- Stove inventory
- Carbon finance tools
- Roster of trained experts ready to respond to crisis situations



## Advocacy

- Advocacy within UN agencies to make cookstove and fuel interventions a priority
- Government advocacy

The Alliance has developed a variety of mechanisms share knowledge with those interested in and within the sector.

## Online portal

Bringing together existing information to better inform the sector such as data and statistics, research and reports, country specific information, best practices, and case studies

Facilitating knowledge and experience sharing through communities of practice and country portals

## Toolkits

Collecting and distributing information in interactive, innovative ways through multiple means that will be useful for stakeholders, including around topics such as financing, technology transfer, women's empowerment, and others.

## Workshops

Building capacity by conducting trainings across the world, especially in priority regions.

Facilitating knowledge and experience sharing, collaboration through in-person meetings of stakeholders

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# Alliance Country Selection



After undertaking a robust data driven approach to select potential countries of prioritization for its first phase, the Alliance engaged in consultations in over 18 countries and commissioned 16 market assessments in an effort to further prioritize its engagement.

## Alliance is taking a “portfolio” approach in its effort to prioritize countries.

- Priorities determined based on size of impacted population, maturity of market in each country, magnitude of need, strength of partner (including government) commitment, and ability to contribute to Alliance goals
- As a portfolio these countries have diversity in cookstove design, manufacturing, assembly, distribution, marketing, sales, and financing models and lessons can be drawn from each country for other “like” partner countries to ensure exponential growth of the market in Phase 2 and Phase 3.
- Government role, type of fuel, customer segments engaged all vary from country to country within the portfolio, providing even further learnings for the portfolio at large and other partner countries.

**Alliance has prioritized engagement in 6 countries immediately, with the potential of up to 4 more in Phase 1.**



***Bangladesh***



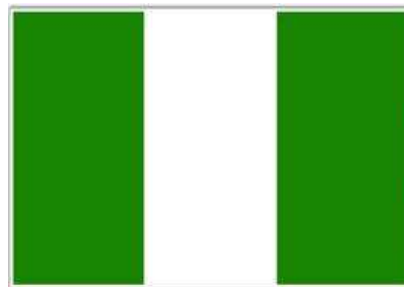
***China***



***Ghana***



***Kenya***



***Nigeria***



***Uganda***

Up to four more countries from the following – Cambodia, Ethiopia, Guatemala, India, Indonesia, Mexico, Nepal, Peru, Rwanda, Tanzania and Vietnam.

# Country Prioritization at a Glance

	Bangladesh	China	Ghana	Kenya	Nigeria	Uganda
<b>Greatest Need</b>	✓			✓		✓
<b>Greatest Potential Impact</b>	✓	✓	✓	✓	✓	✓
<b>Contribution to 100 million (% of goal)</b>	Moderate	High	Small	Small	Moderate	Small
<b>Testing Innovative Interventions</b>	✓		✓	✓	✓	✓
<b>Leveraging Resources and Partnerships</b>	✓		✓	✓		
<b>Consumer Segment Focus</b>	Rural	Rural	Urban/Peri Urban	Urban/Peri urban	Urban	Rural
<b>Fuel Intervention Focus</b>	Biomass	Transition from coal	LPG and improved charcoal	Ethanol	LPG/improved charcoal	Biomass
<b>Government Engagement</b>	Strong, Energy and Environment driven	Strong, rural and provincially driven	Strong, Energy and Environment Driven	Strong – interministerial but private sector driven	Light govt/ Primarily small enterprise driven	Strong renewable energy goals
<b>Mission Statement Primary Focus</b>	Empower Women; environment	Health; environment	Energy access & livelihoods	Livelihoods/ health/enviroment	Empower women/ livelihoods	Environment

# Bangladesh – Summary of Alliance Engagement

## Cookstove sector

- Strong government interest and national energy policy in development (SREDA)
- Some of the world largest NGOs already experience with sales to BoP
- Large cookstoves and fuels programs with international NGOs and other interested in entering the market
- BRAC interested in the sector

## Alliance Market Development Efforts

- Pilot interventions with partners that will tap into existing distribution networks not currently selling stoves
- Test consumer finance and women's empowerment approaches
- Support R&D so that improved technologies are available to replace basic improved cookstoves

## Enabling Environment Interventions

- Research ongoing on gender and empowerment best practices
- Part of larger global climate mapping study
- Advocate government to adopt "technology" not made in Bangladesh

## Other Front Burner Issues in Bangladesh

- Members of Clean Air and Climate Coalition

# China – Summary of Alliance Engagement

## Cookstove sector

- Largest cookstove program in any country
- Current 5 year plan has provision for promoting clean cookstoves
- NDRC is a strong nodal ministry for Alliance with interest in coordinating among other agencies
- China Alliance an active partner

## Alliance Market Development Efforts

- Support the development of a national cookstove program -- provide best practices from other countries
- Sensitization of manufacturers on global needs

## Enabling Environment Interventions

- Alliance Global Research Platform to have a hub in Beijing. Inclusion of Chinese data to support international collaborations  
Focus to understand benefits of clean cooking and fuel processing technologies
- Partner with the government to enhance testing capacity to support organizations in China

## Other Front Burner Issues in China

- World Bank East Asia considering a program in China

# Ghana – Summary of Alliance Engagement

## Cookstove sector

- Strong combination of domestic and international cookstoves actors
- Multiple fuels in use – wood, charcoal & LPG
- Strong government policies in support of cleaner fuels and more efficient cookstoves
- Multiple initiatives converging for possible quick impact– SE4ALL, ECOWAS cooking initiative, W LPG, ACCES and Alliance
- GOAL of 5m HH with clean cookstoves by the year 2020

## Alliance Market Development Efforts

- Demand – focus on building awareness and enabling financing to two customer segments. Urban and periurban with access to but limited use of LPG and rural customers using wood in the north
- Supply – support for capacity building of select entrepreneurs through Alliance Spark Fund and for innovation in improving charcoal production and technology that will make exiting local stoves more clean and efficient

## Enabling Environment Interventions

- Cutting edge testing Center enabled in Senegal that will service Ghana as well. Likely to have a “spoke” of the Senegal testing hub in Accra
- One of the three child survival research studies being conducted in Ghana
- Advocate govt to reduce import tariffs on cookstoves and raw materials,; modify the current LPG subsidy to be better suited for household use; apply solar incentives to sector
- Ghana knowledge hub to be developed

## Other Front Burner Issues in Ghana

- Allow Alliance to work with a segment that could move to LPG
- Country with strong development agenda, strong government engagement, conducive environment to private investment
- Trial Alliance engagement with many international actors

# Kenya – Summary of Alliance Engagement

## Cookstove sector

- Strong SME driven sector with engagement from traditional and new actors
- Strong international govt and investor interest in Kenya (Energy +, WBank, AfDB)
- Government Kerosene Free Kenya initiative prioritizing cookstoves and established interministerial coordination group
- Strong potential for ethanol and LPG
- GOAL of 5m stoves by 2020

## Alliance Market Development Efforts

- Target two customers segments – urban slum; peri urban slum segments paying for wood/charcoal
- Test efficiency of ethanol supply chain and pilot clean fuel interventions
- Provide support to entrepreneurs along the value chain (finance, marketing, technology, distribution, etc.)

## Enabling Environment Interventions

- Cutting edge testing center enabled in Uganda and Kenya as a “spoke” will have its own center for stove improvement
- Climate mapping study to include Kenya
- Advocate government to ensure East African free trade zone applies to cookstoves and fuels; interest rate incentives for renewable energy use

## Other Front Burner Issues in Kenya

- Strong entrepreneurial activity at the base of the pyramid



# Nigeria – Summary of Alliance Engagement

## Cookstove sector

- Private actors from MNCs, international manufacturers, LPG distributors, NGOs
- High fuel prices, scarcity of wood lead to consumer aspirations for cleaner fuels
- Successful consumer product business models and women's organization at base of the pyramid
- National Alliance in place

## Alliance Market Development Efforts

- Commission a supply chain study to understand the key barriers in getting stoves to the market
- Support entrepreneurs to overcome supply chain barriers (access to finance, consumer research, etc.)
- Leverage women and faith-based networks and other product distributors

## Enabling Environment Interventions

- Childhood survival health study underway
- Support to develop national testing center
- Conduct government advocacy to promote the inclusion of cookstoves and fuels in policy, reduce tariffs, and ensure coordination through the national Alliance

## Other Front Burner Issues in Nigeria

- Under consideration by SE4ALL as a priority country

# Uganda – Summary of Alliance Engagement

## Cookstove sector

- Government has set renewable energy target at 61% by 2020
- Biomass energy strategy in place
- Many players with different carbon financing approaches in place; and actors interested and capable regional roles
- Carbon revenue sharing approaches unique and likely scalable

## Alliance Market Development Efforts

- Test variety of carbon finance approaches to determine effectiveness
- Pilot M&E tools
- Provide support to carbon finance entrepreneurs (R&D, market intelligence, and distribution)
- Broker partnerships between carbon credit buyers and sellers

## Enabling Environment Interventions

- Enhance existing testing center, promote standards and testing protocols globally
- Create specific areas on knowledge hub to facilitate coordination and collaboration with regard to carbon financing
- Conduct government advocacy to make cookstoves and fuels a national priority and to ensure coordination

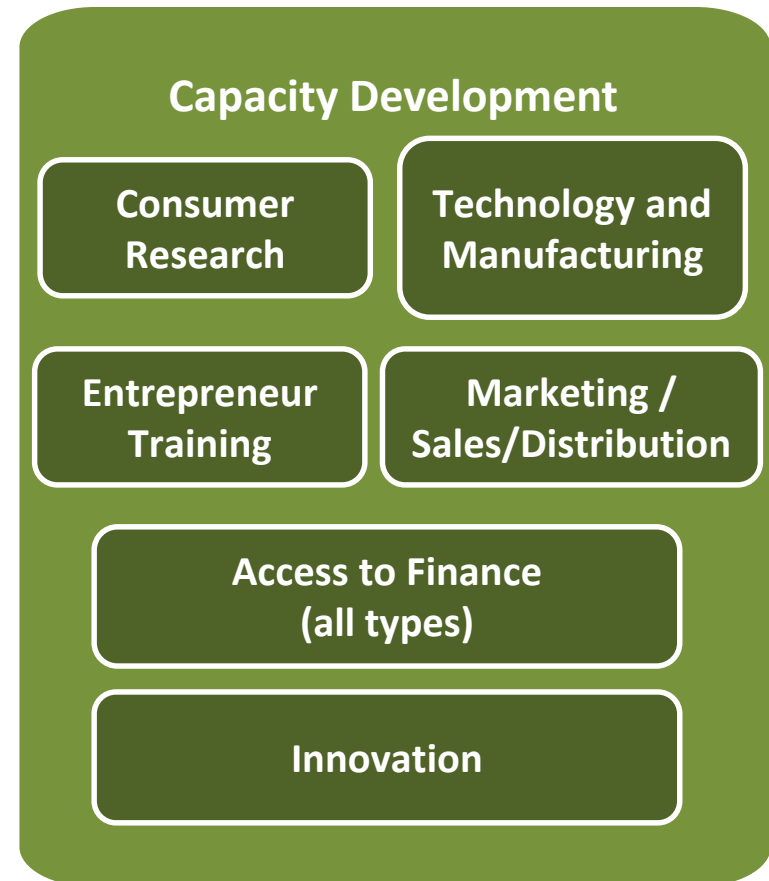
## Other Front Burner Issues in Uganda

- Likely to be a World Bank ACCES priority country

# The Alliance will deploy a two track approach to enable markets in priority countries.



***Activities for the public good that benefit the entire sector***



***Tailored support that focuses limited resources on driving scale***

# Public Goods

- **Objective: To help the entire sector** (i.e. a rising tide raises all ships) by conducting and supporting a range of activities and interventions that will remove some of the major barriers the sector currently faces
- Takes place at both Global and In-Country levels
- Tends to help with the creation of a sector-wide enabling environment, as opposed to direct support for enterprises, though this is not always the case
- Funded through a combination of grants and innovative finance
- **Example Activities:**
  - Development of global standards: Objective, globally accepted standards that will provide clarity to the user, manufacturer, researcher and investor.
  - Advocating for Change with Governments: Work with both donor and governments of impacted countries to make stoves a greater priority, launching new stoves initiatives, favorable policies and regulations, etc.
  - Market Intelligence: Commissioning and publishing open source market intelligence

# Tailored Support for Qualifying Entrepreneurs

- **Objective: To unleash stove entrepreneur potential by providing resources (grant and investment) so they can tackle multiple value-chain barriers simultaneously**
- Takes place globally and in-country but priority given to entrepreneurs:
  - Working in priority countries
  - Already or have the potential to scale up their engagement in the stove sector (whose quality is continuously improving)
- Example Activities in support of entrepreneurs:
  - Design: Enhance their stove design (through the provision of world-class R&D support)
  - Consumer Understanding: Better understand their consumer (by providing grants to enable them to conduct market research)
  - Production: streamline manufacturing process (by helping them access funding – grant or investment – to buy new equipment, expand factory, etc.)
  - Access to Finance: Convene a partnership of organizations to deliver a needed but currently unavailable intervention e.g. a Working Capital Fund or a First-loss Guarantee Fund

# Innovation

- **Objective:** To drive disruptive change to business as usual, recognizing that new, innovative ideas along the entire value-chain play an important role in delivering a thriving sector
- All activities would take place at multiple levels – global, regional and local – but emphasis will be given to priority countries
- Examples Activities include:
  - Technology: Support for potential groundbreaking stove technology
  - Distribution: An innovative business model or distribution system is trialed
  - Partner: An innovative partnership is formed to tackle a value-chain barrier

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# This sector can only truly function as a market *if and when* investors see the potential.

\$3.5b a year  
to achieve  
universal  
adoption of  
clean  
cookstoves



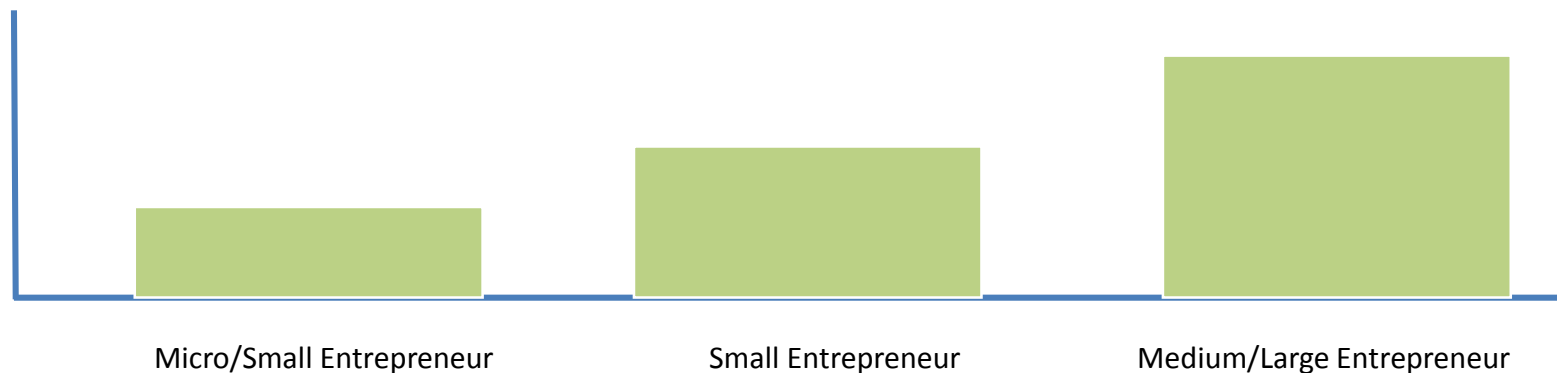
**Current Investment**

Alliance needs to mobilize grant resources and use those to strategically leverage private investment.

Alliance needs to support capacity development of stove enterprises to get them to the point of investment readiness.



**Alliance has unique roles and critical tools that it can employ along the entrepreneurial life-cycle, while it builds awareness across all investor groups.**



<b><i>Alliance Role</i></b>	Help build capacity in a “gap” area for an enterprise that otherwise has strong potential to scale.	Help build capacity of an organization to ensure investment readiness.	Help build capacity of an organization to ensure investment readiness. Work to broker financing partnerships.
<b><i>Alliance Tool(s)</i></b>	Alliance Spark Fund	Alliance Spark Fund Loan Guarantee Product	Loan Guarantee Product Working Capital Fund

# Alliance will administer a catalytic capacity development fund for qualified entrepreneurs.

## Alliance Spark Fund – An Innovation and Capacity Development Fund

- Once a year, individual stove entrepreneurs can apply to this fund for support at one or multiple points along the value-chain
- Entrepreneurs expected to explain in detail the type of support they require
- Likely min. \$50,000 to max. \$500,000. Alliance goal is to have \$2m available in the fund annually.
- Investment advisory committee sets the criteria and experts select awardees
- A robust initial terms of reference with each entrepreneur, including quarterly reporting, staggered payments based on key milestones being achieved and regular monitoring by Alliance to ensure support effectively used.
- Support will be closely coordinated with other entrepreneur support mechanisms (to avoid duplication or replication)

## Alliance will develop a suite of loan guarantee products to *derisk* investments and encourage impact investors and venture capitalists to enter the sector.

- Alliance will work with DFIs, philanthropists and foundations to ensure availability of a variety of loan guarantee products
- Alliance aims to have at least 3 loan guarantee products in the range of \$1m to \$10m available for qualified entrepreneurs in phase 1

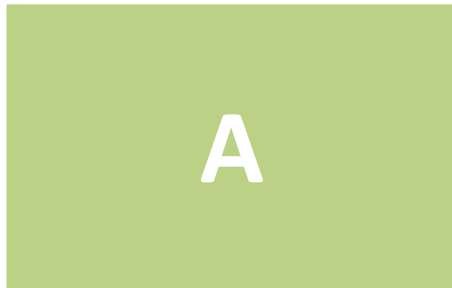
## Alliance will capitalize a Working Capital Fund that will be administered by a third party to support needs of investment ready businesses in the sector.

- Alliance aims to raise investment dollars from philanthropists, venture capitalists and early stage patient investors to capitalize a \$75m working capital fund during Phase 1.
- Alliance will have a qualified Fund Manager oversee all aspect of fund management. Alliance will serve on the investment steering committee.
- Fund might be exclusively for clean cookstove businesses or one that caters to businesses that service the needs of the population at the Base of the Pyramid with a \$75m allocation for clean cookstove businesses.

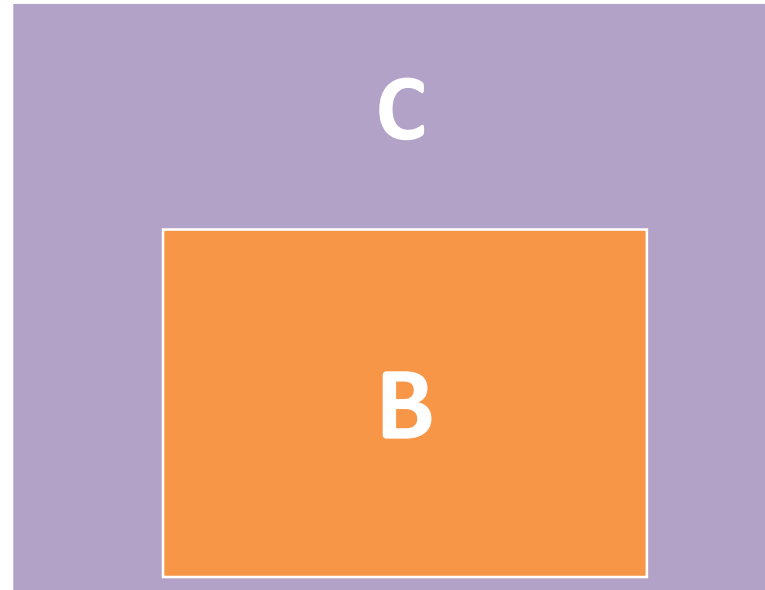
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# The Alliance will mobilize grant resources at three levels.



- A.** The Alliance mobilizes resources (financial and in-kind) to support priorities that will be delivered:
- i. directly by the Alliance
  - ii. indirectly through Alliance partners and other organizations



- B.** The Alliance brokers resources and partnerships for Alliance partners to execute against. Funding does not necessarily go through the Alliance.
- C.** The Alliance champions and advocates for additional resources for the cookstove sector at-large.

# Phase I – Donor Partnership Priorities

Donor Objectives	Primary Audience	Phase I
<p>Design and execute a <b>successful partnership strategy</b> that builds a <b>strong base of financial and in-kind support</b> for the Alliance's 100 x 2020 adoption objectives, assists partners to meet their individual strategic goals, and supports the development of a <b>thriving global marketplace for clean cookstoves and fuels.</b></p>	<p><b>Donor governments</b></p> <p><b>Corporate partners companies primarily in consumer goods, ICT, Food/Ag, Financial Services and Health/Pharma sectors</b></p> <p><b>Institutional and Phil-anthropic Foundations</b></p> <p><b>Major donors in US, Europe, Japan, and developing world</b></p> <p><b>General public</b></p>	<ul style="list-style-type: none"> <li>• <b>Bilateral Donors - \$20m to \$25m</b> <ul style="list-style-type: none"> <li>• Retain current bilateral donors</li> <li>• Increase \$\$ from current donor countries</li> <li>• Secure 6 new bilateral donors</li> <li>• Diversify funding sources (ministries) within existing donor countries</li> </ul> </li> <li>• <b>Corporations - \$10m to \$20m</b> <ul style="list-style-type: none"> <li>• Develop multi-asset engagement strategy with 6-8 new corporate donors</li> <li>• Diversify base (geographic, sector, etc.)</li> <li>• Formalize in-kind support with 5 new partners</li> </ul> </li> <li>• <b>Foundations - \$5m</b> <ul style="list-style-type: none"> <li>• Retain current foundation donors and increase their funding commitments</li> <li>• Secure 5-7 new foundation gifts</li> <li>• Develop 2 add'l non-US foundation grants</li> <li>• Hold tailored foundation briefings and outreach sessions (US, UK, elsewhere)</li> </ul> </li> <li>• <b>Individual Donors - \$1m</b> <ul style="list-style-type: none"> <li>• Develop individual major gifts campaign</li> <li>• Develop strategy for public-facing donor campaign</li> </ul> </li> </ul>

# Enhanced Partner Engagement

As our partner base continues to grow, stakeholder engagement and stewardship will be critical. The following are some of the areas in which we hope to increase our “touch” with our ever expanding partner base:

- Increase visibility of our partners in print, video, and social media to highlight their achievements;
- Inclusion in regional and national stakeholder events and conferences to increase their visibility;
- Participation in steering committees and peer review panels to draw on the wealth of existing knowledge in the sector;
- Involvement in training and capacity building activities to build sector expertise;
- Development of case studies and best practices to further highlight partner accomplishments;
- Actively engage them in new Alliance *Spark Fund* and other financing mechanisms to bring much needed pre-investment and investment resources to the sector;
- Resource mobilization to help partners secure needed grant funding;
- Participation in the Clean Cooking Forum 2013 in Cambodia to convene the sector and facilitate exchange of knowledge; and
- Connect partners through our online community tools and networking website.



# The Alliance will deploy transparent procurement and implementation mechanisms.

## Priorities <\$100k

**The Alliance Secretariat will determine the best provider with consultation of up to 2 subject matter experts and will sole source the effort.**

## Priorities >\$100k

**The Alliance Secretariat will commission a peer review committee of subject matter experts to rapidly evaluate responses to RFPs that have been issued.**

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# Alliance Governance and Support Structures

**Leadership Council** – This Council serves as critical champions, thought leaders, collaborators and catalysts of and for the Alliance. Members share their support and service by providing the Alliance with their professional expertise; their diverse knowledge of constituent perspectives; their connections to and influence with local, national or international resources, colleagues, peers and platforms; their philanthropic support or other forms of needed assistance.

**Advisory Council** – This body will provide strategic guidance and oversight to the Alliance management team in support of Alliance efforts to reach its goals. The body will not have fiduciary responsibilities as the Alliance is currently a part of the UN Foundation and all fiduciary responsibilities lie with the UNF board.

**Alliance Ambassadors** -- Entertainers and other personalities who communicate the messages of the Alliance to our target constituents.

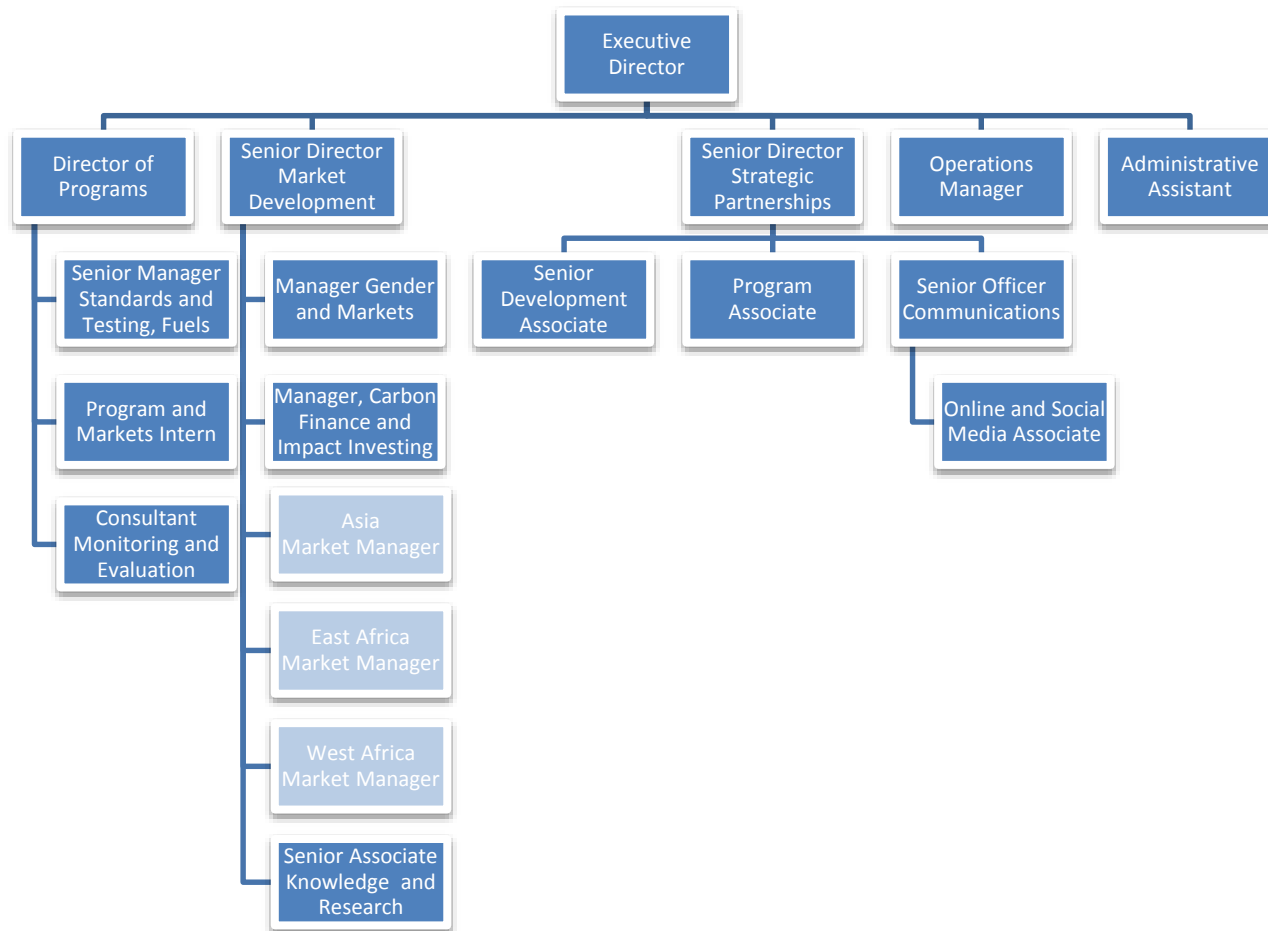
**Alliance Steering Committees** – These bodies are created for specific purposes to assist the Board and management team in its work. Focus will be on providing technical assistance for Alliance programmatic and market engagement, assessing the impact of a service or program, conference advisory services, resource mobilization, and serving as an advocate or public relations advisors to the management team.

# Advisory Council and Steering Committees will support the Alliance Secretariat.

2010- 2011



The Alliance organizational structure suggests on average a team of 15 FTEs for optimal operations.



Back office, human resources, grants, and contract management provided by UNF.  
 Knowledge and Research position reports into Markets team but has cross cutting responsibilities.  
 Part time support on building China engagement.

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# Alliance Balanced Score Card

Value Proposition*	Indicators	Annual Targets		
		2012	2013	2014
All	Cookstoves sold Activities completed (as per Strategic Business Plan)	3m 85%	4m 85%	5m 85%
Promote International Standards	Standards Testing centers supported	ISRS in place 6 (25%operational)	25% of ISO process complete** 6(50%operational)	75% of ISO process complete** 6 (100%operational) 4 (25% operational)
Mobilize Resources	Direct \$\$\$ to Secretariat (grant) Indirect \$\$\$ leveraged for sector (grant) Indirect \$\$\$ leveraged for sector (impact investment)	\$10m \$10m \$15m	\$10m \$15m \$25m	\$15m \$25m \$35m
Broker Partnerships	New Alliance partners (baseline 250) -New orgs entered sector*** -Partnerships brokered by Alliance	75 20 25	75 25 30	80 30 35
Enable Markets	% of Alliance partners who agree Alliance activities have directly helped increase stove sales****	50%	60%	70%
Coordinate Sector Knowledge and Research	Visits to, activities on Alliance website; number and quality of tools to aid research and market development; strategic research funded and research results communicated	Alliance Knowledge Hub Live	Alliance seen as 'the' hub by 75% of partners****	State of Sector Report published with buy in ??
Champion the Issue	Global Key Opinion leaders see issue as priority***** No. of 'hits' in quality media (e.g. NYT, Economist , Atlantic, Guardian, The Independent etc.) No. of visits to website (65,000 in 2011; 39,000 unique) Newsletter recipients (1,308 at end of 2011)	Up5% 12 Up15% (new site) Up25%	Up10% 25 Up10% Up20%	Up20% 35 Up 10% Up 20%

\*Some overlap, \*\*Measurable as ISO follows defined process \*\*\* i.e. never been in stoves before \*\*\*\*Using annual partner feedback survey

\*\*\*\*\*Using Reputation Tracker Survey of 50 Key opinion leaders and baseline of early 2012 Alliance Business Plan – October 2012 85

# Milestones Towards Success

Sub-Area	Indicators	Target		
		Phase 1	Phase 2	Phase 3
Clean Cookstoves Sold, Adopted, and Used	<ul style="list-style-type: none"> <li>• Sales by emissions, efficiency, and safety tiers</li> <li>• Extent of adoption and use</li> <li>• Field verification of use and performance</li> </ul>	15m	42m	100m
Lives Saved	<ul style="list-style-type: none"> <li>• Reduced exposure, burns, and injury</li> <li>• Modelled deaths and DALYs</li> <li>• Impacts on severe pneumonia, adverse pregnancy outcomes, and markers of noncommunicable disease</li> <li>• Perceived benefits / reduced discomfort from smoke</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ exposure</li> <li>• modelled health impacts</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ exposure</li> <li>• modelled health impacts</li> <li>• 50% ↓ in burns and injuries</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ exposure</li> <li>• modelled health impacts</li> <li>• 50% ↓ in % of major cookstove-related illnesses</li> <li>• 75% ↓ in burns and injuries</li> </ul>
Livelihoods Improved	<ul style="list-style-type: none"> <li>• Increased employment / income generation across value chain</li> <li>• Increased wealth / assets</li> <li>• Increased education / training</li> </ul>	<ul style="list-style-type: none"> <li>• Define baseline</li> <li>• Set targets for indicators</li> </ul>	TBD	
Women Empowered	<ul style="list-style-type: none"> <li>• Reduced drudgery, i.e. time/ labor savings, reduced distance to fuel</li> <li>• Number of stove businesses who adhere to gender-informed best practices</li> <li>• Agency in decision making</li> </ul>	<ul style="list-style-type: none"> <li>• Define baseline</li> <li>• Set targets for indicators</li> </ul>	TBD	
Combat Climate Change (Includes Environmental Impacts)	<ul style="list-style-type: none"> <li>• Fuel savings</li> <li>• Forests saved</li> </ul>	<ul style="list-style-type: none"> <li>• 30% ↓ fuel / stove</li> </ul>	<ul style="list-style-type: none"> <li>• 30-60% ↓ fuel / stove</li> </ul>	<ul style="list-style-type: none"> <li>• 60% ↓ fuel / stove</li> <li>• 3 – 6 M ha/forests</li> </ul>
	<ul style="list-style-type: none"> <li>• Emissions mitigated</li> </ul>	<ul style="list-style-type: none"> <li>• 16 M tons CO<sub>2</sub>e</li> </ul>	<ul style="list-style-type: none"> <li>• 42 – 168 M tons CO<sub>2</sub>e</li> </ul>	<ul style="list-style-type: none"> <li>• 100 - 400 M tons CO<sub>2</sub>e</li> </ul>



# Potential Risks for the Alliance

Risk	Description	Mitigation measures
<b>Strategic</b>		
Not seen as a truly “global” initiative	The Alliance is or is perceived to be a too U.S.-centric or Northern-led an initiative.	Balanced membership, funding, and profile base
Host fit & continued support	Comfort of Alliance mode of engagement (i.e. market mechanism) with that of UNF strategy. Continued support from UNF through Phase 1.	UNF leadership made aware of these concerns and movements in UNF strategy ideally to incorporate Alliance strategy at least in Phase 1.
<b>Financial</b>		
Funding	Alliance fails to raise enough funds to cover priority activity and core costs.	Focused, disciplined fundraising strategy that emphasizes multi-year commitments.
<b>Operational</b>		
No focus	Alliance tries to tackle too many issues, scratching the surface on all, achieving little.	Disciplined, focused business plan. Regular reviews to ensure the Alliance is on track to achieve goals.
Capacity	Staffing does not meet the Alliance needs and deliverables.	Ongoing review of staff against deliverables and adjustment to be made accordingly and expediently.
Goals	100 million by ‘20 target and/or Alliance KPIs are off-track	Balance Score Card is reviewed quarterly and at Board meetings
Partners	Alliance members don't see Secretariat delivering against value propositions and ask to dissolve Alliance.	Regular outreach to Alliance partners to incorporate their views and approaches – in line with strategic business plan goals

# Exit Strategies

**If we fail to raise enough resources to operate:**

**Assess why this is the case and revise fundraising and champion the sector strategies accordingly. Streamline the Alliance Secretariat. If after concerted efforts, it is still not possible to raise sufficient resources, then close the Alliance.**

**If we fail to enable markets in priority countries:**

**Assess why activities are not achieving success. Consider revising existing country Market Enabling Plan to mitigate these issues and implement the changes. If these do not succeed within an agreed timeframe, exit the country.**

**If we fail to meet a significant number of metrics:**

**Assess why the Alliance's strategy and implementation plan is not succeeding. Together with the Board, agree on a revised strategy and plan and a defined period for delivering progress. If this does not occur, explore other improvement options. If these do not deliver, then close the Alliance.**

**100 million target achieved early or by 2020:**

**Conduct an Alliance needs assessment. Assumed likely outcome is that until universal adoption is achieved the Alliance will still have a value-adding role to play, but if this is deemed untrue, then consider closing it.**



**Thank You!**  
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