

MARKET ENABLING ROADMAP

2015 - 2017

GLOBAL ALLIANCE FOR
CLEAN COOKSTOVES

This Roadmap suggests a path forward for the Alliance and the sector in Phase 2 to achieve a goal of 60m households adopting cleaner and more efficient cooking solutions by 2017.

This is a living document. While this reflects our lessons learned in Phase 1 and the input of partners, we continue to welcome further comments to strengthen our collective approach.

The Alliance envisions that the sector will need approximately \$500m in grant and investment resources to achieve these goals.

Specific implementation plans and timelines will be dependent on resources generated.

The Global Alliance for Clean Cookstoves will create a thriving market for clean cookstoves and fuels.

PROBLEM

Every day,
3 BILLION
PEOPLE
(500 million households)
rely on solid fuels to
power their rudimentary
stoves



which leads to...

- 4,300,000 deaths annually
- Wasted productivity
- Climate, forestry & other environmental degradation
- 21% of global black carbon emissions
- Health & economic burdens that disproportionately impact women & girls



MISSION

- SAVE LIVES
- IMPROVE LIVELIHOODS
- EMPOWER WOMEN
- PROTECT THE ENVIRONMENT



GOAL



100
MILLION
HOUSEHOLDS
ADOPT CLEAN AND
EFFICIENT
COOKSTOVES &
FUELS BY 2020

Our market based approach is built on three core strategies ...



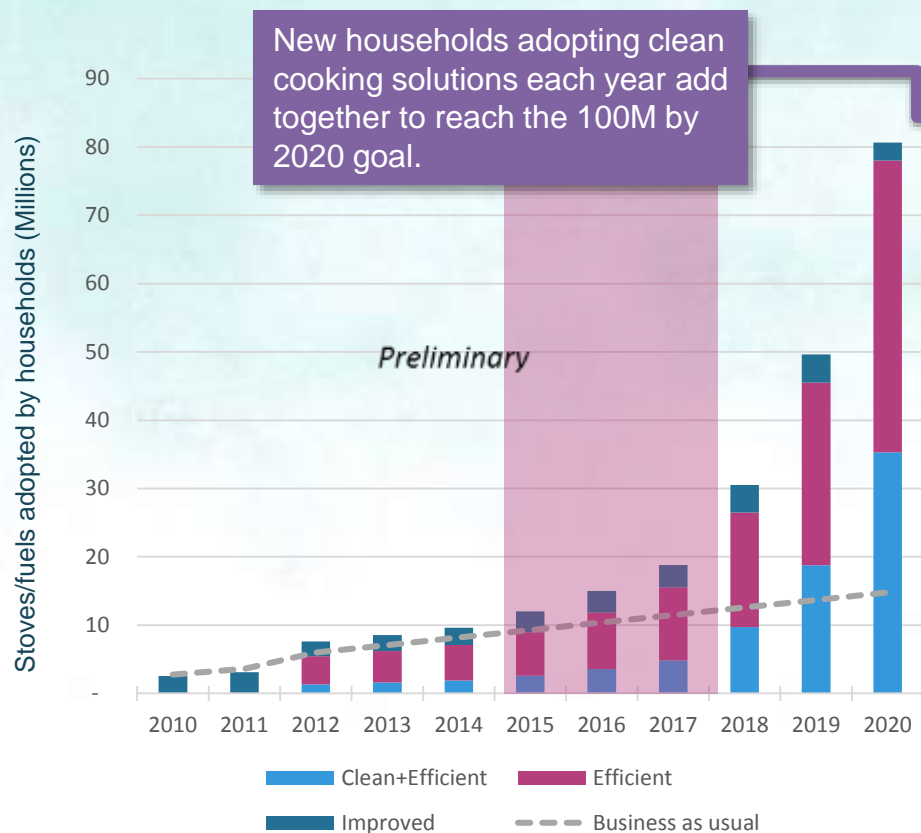
...and is being pursued in three phases.



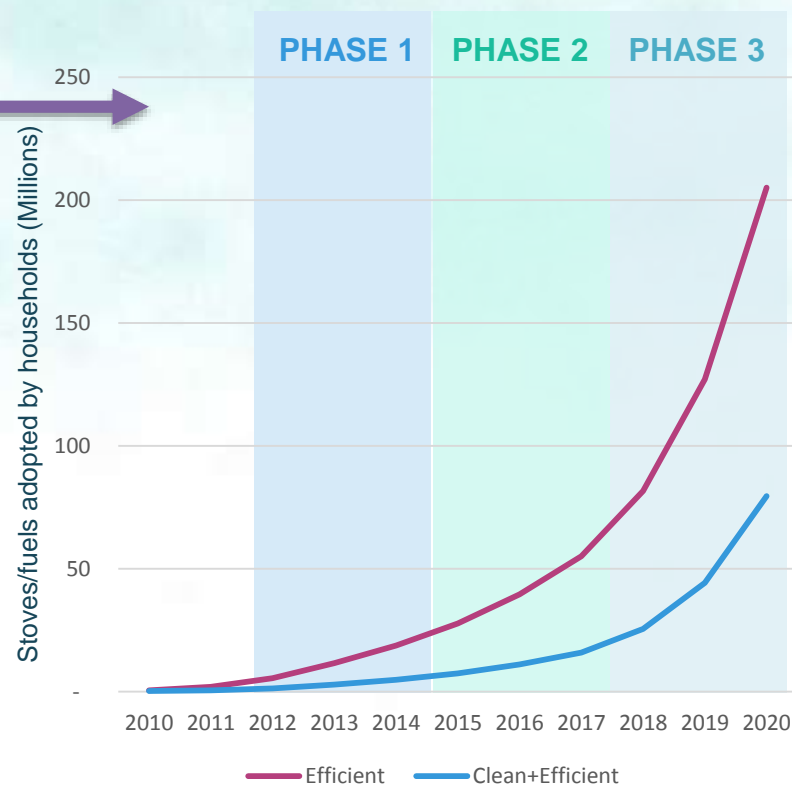
By the end of 2014, over 20m HH cumulatively will have access to cleaner and more efficient cookstoves and fuels and we will likely reach our goal of 100m HH a year ahead of the 2020 target.

Household Adoption of Stoves/Fuels

Yearly



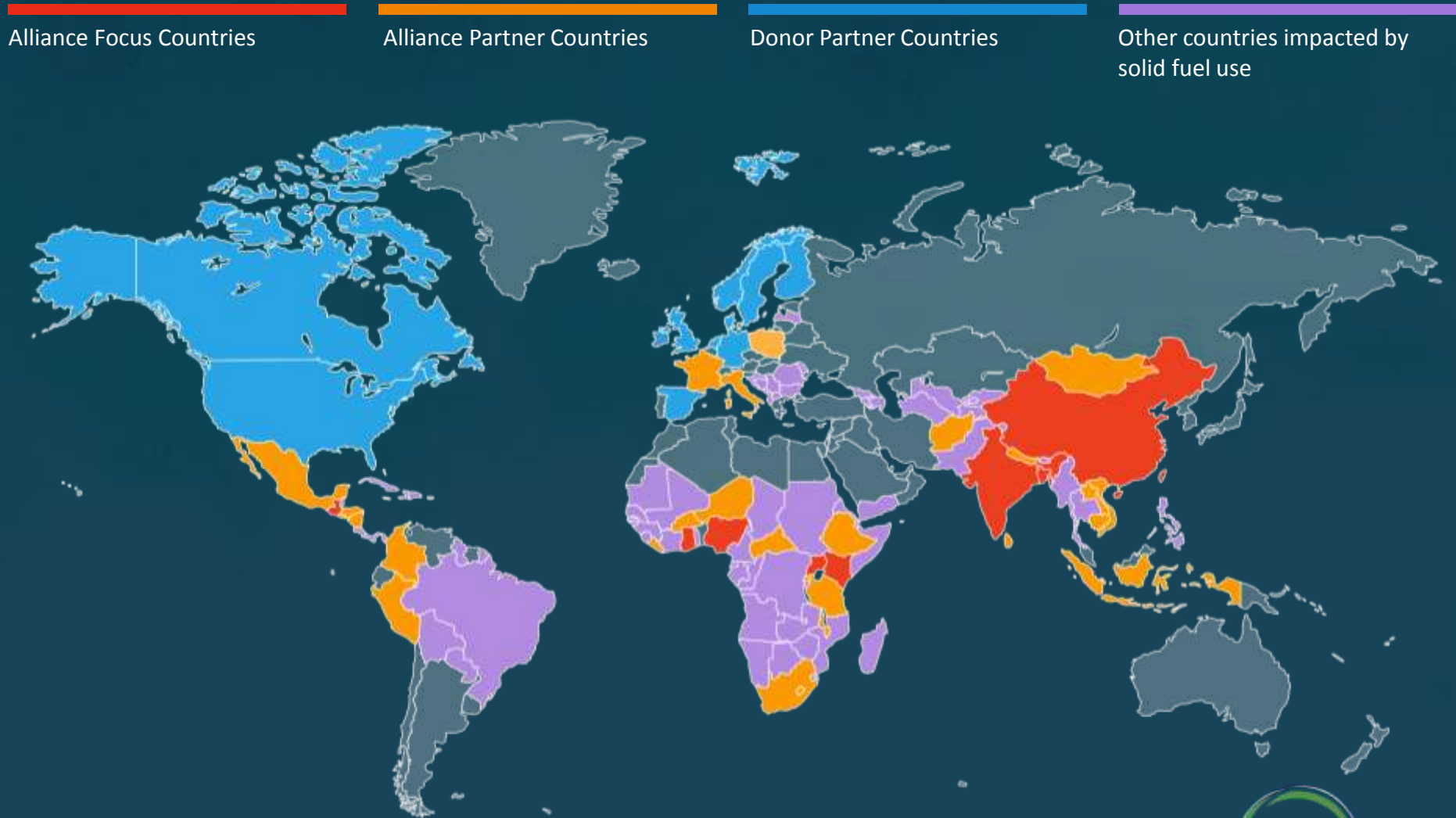
Cumulative Over 3 Phases



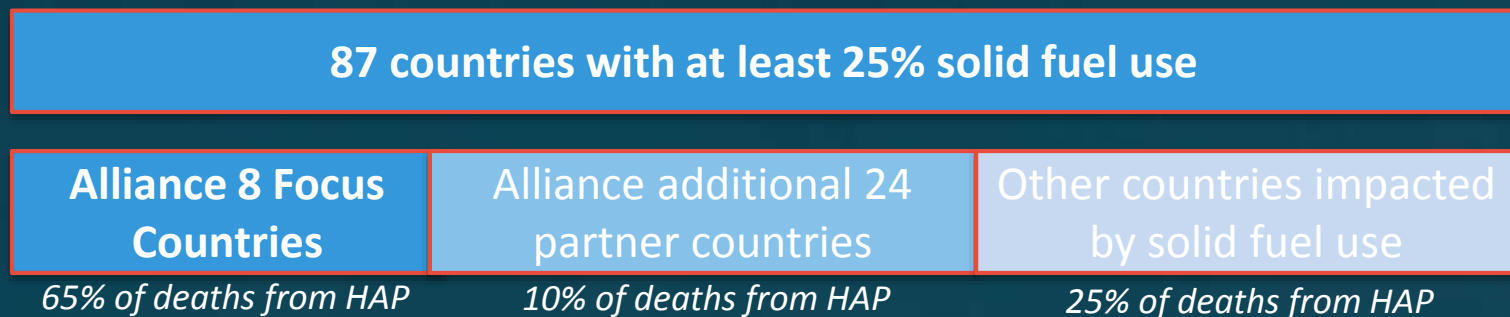
The Alliance now has 1,000 partners actively supporting and growing the sector.

Donor Countries	Canada Denmark Finland	Germany Ireland Malta	Netherlands Norway Spain	Sweden United Kingdom United States			
Private Sector & NGO	 	 	 	 	 	 	
UN & MFI	 	 	 	 	 	 	
National Partners	Afghanistan Bangladesh Burkina Faso Cambodia Central African Rep.	China Colombia Côte d'Ivoire El Salvador Ethiopia	France Ghana Guatemala Honduras Indonesia Italy	Kenya Laos Lesotho Liberia Malawi	Mexico Mongolia Nepal Nicaragua Niger	Nigeria Peru Poland Rwanda South Africa	Sri Lanka Tanzania Uganda Vietnam

We will continue to utilize a focused geographic strategy...



...to achieve rapid and sustainable impact.



Tailored Market Development Efforts



National Communications & Advocacy



General Enterprise & Programmatic Support



Global Communications & Advocacy



Global Standards



Phase 1 Accomplishments



Fostering an Enabling Environment

- 35 Alliance research studies, leveraging ongoing related efforts to maximize value and ensure rapid delivery of results
- Over 30 countries engaged in the development of ISO standards
- Interim international standards established in four critical areas of technology performance including indoor and total emissions, efficiency, and safety
- WHO Indoor Air Quality Guidelines approved and released
- 13 testing centers around the world enhanced through grants and many more engaged in training and collaborative opportunities
- Global Burden of Disease demonstrates and global community accepts that HAP is 4th highest public health risk, and 2nd highest for women, in the developing world



Strengthening Supply

- Close to \$50m in investment resources supporting the production and distribution of cookstoves
- 3 different capacity building mechanisms developed in support of 100 enterprises
- 5 different financing mechanisms in place to support innovation and growth that have supported 40 enterprises; including a Women's Empowerment Fund
- \$15m to support innovation in the sector
- Attracted over \$170m in carbon finance



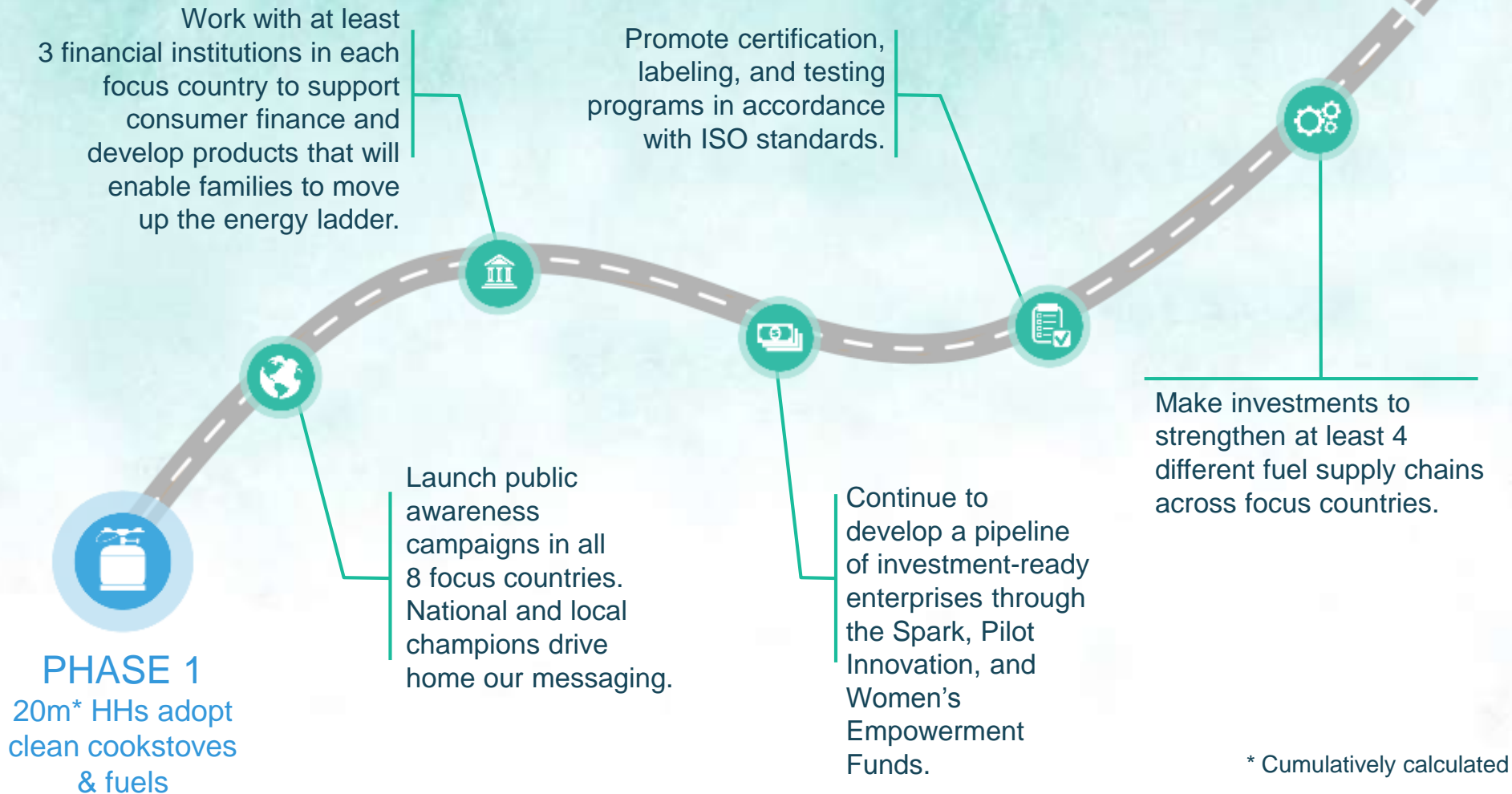
Enhancing Demand

- Customer segmentation studies completed in 3 focus countries
- Customer financing and distribution studies in progress – 2 large national/Pan-African banks finalizing plans for support of consumer finance
- 6 Alliance Ambassadors on board to champion the cause
- Growing in-country media attention

Phase 2 represents a significant shift towards demand creation, while continuing to strengthen supply and the enabling environment.



By the end of Phase 2, the Alliance will strive for 60m* HH adopting clean and efficient cookstoves and fuels.



Pursue meaningful policy and regulatory reforms to optimize the clean cookstoves and fuels market, especially in focus countries.

Help provide access to clean cooking solutions for 5 million people in refugee camps and other humanitarian contexts.

Demonstrate the life-saving impact of clean cooking interventions. Studies on child survival; cardiovascular and lung disease; and burn fatalities will continue to build the evidence base.

PHASE 2
60m* HHs adopt clean & efficient cookstoves & fuels

Use research results to continue to demonstrate the environmental and climate benefits of clean cooking. Affirmation of global energy goals in Post-2015 SDGs, Beijing +20, and SE4All will increase our profile and momentum.

Build a strong global network for evaluation of research.

The global health community fully embraces and acts on the issue of household air pollution.

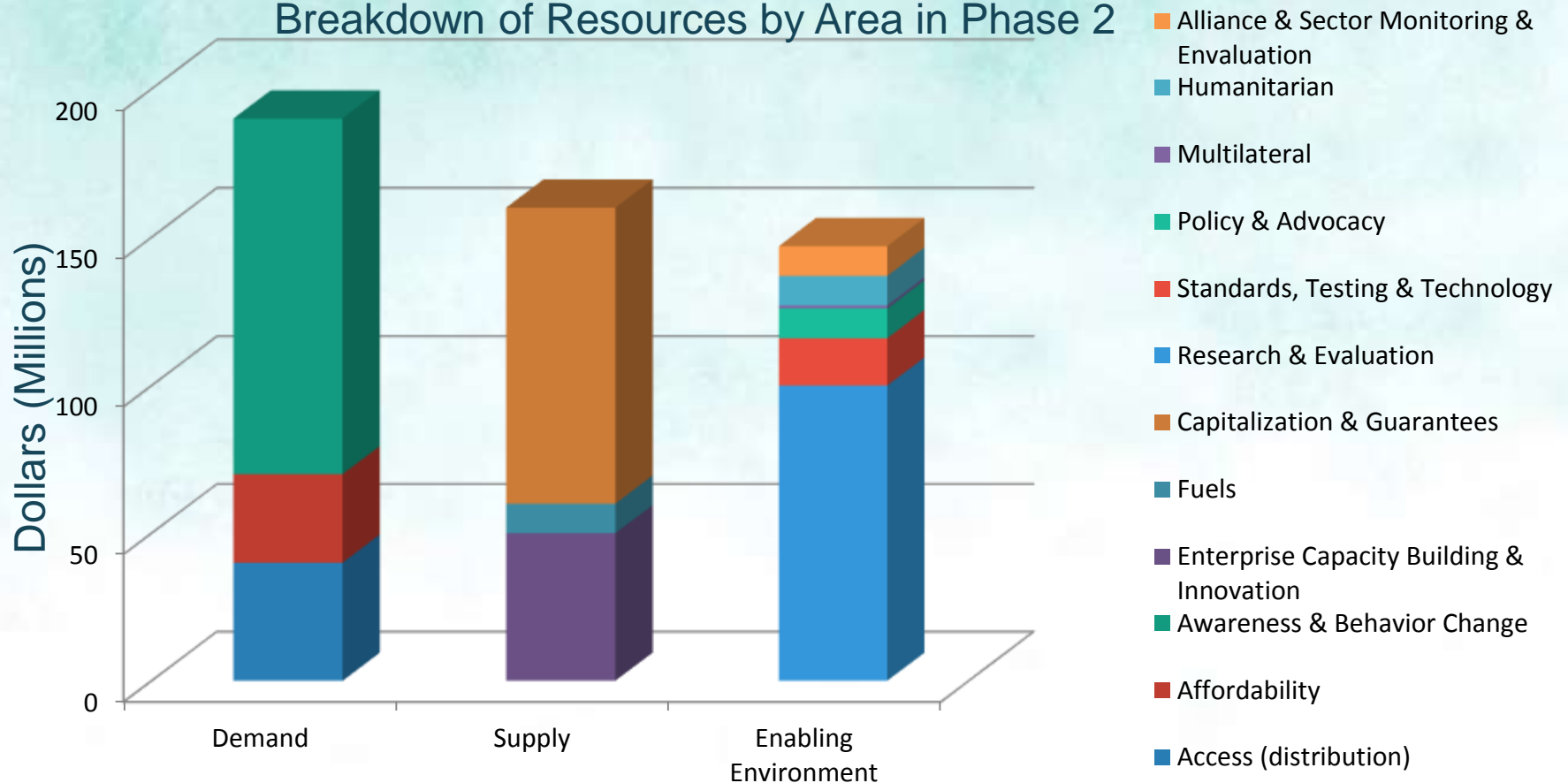
* Cumulatively calculated

The Alliance will need \$500m in resources to accomplish Phase 2 goals.



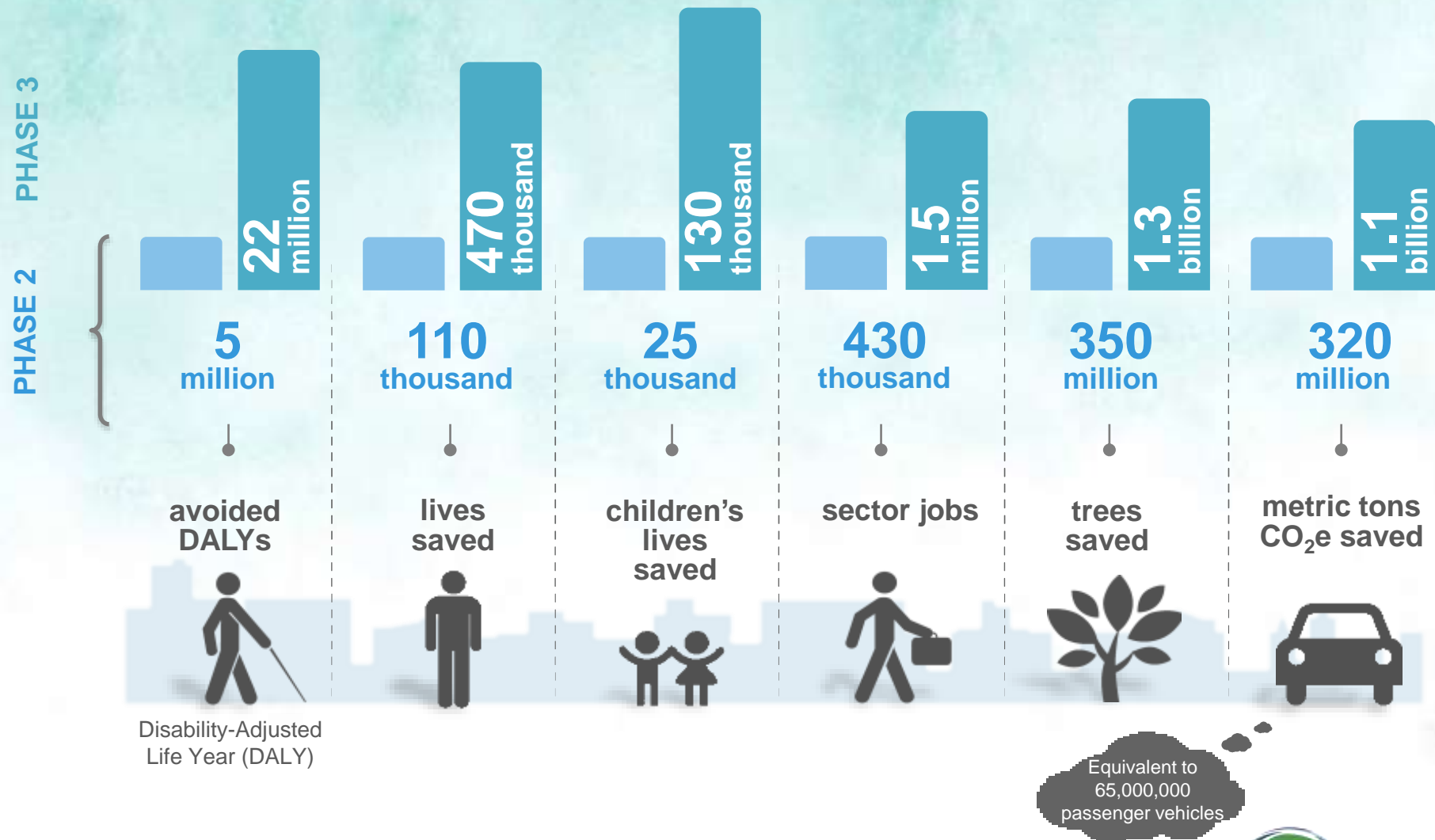
Phase 2 resources will focus on increasing demand while continuing to strengthen supply and enable the market.

Breakdown of Resources by Area in Phase 2



*Alliance women's empowerment and knowledge management efforts have been mainstreamed throughout our programming and this resource allocation

Projected Impacts – Global



Projected Impacts – Per Household

Households PURCHASING fuel



61%

reduction of
spending on fuel



6.2%

household income
saved

Households COLLECTING fuel



102 HOURS

saved per year
collecting firewood

Together we can build on the 'spark' we ignited in Phase 1 to create a dynamic marketplace with sustained impact in Phase 2.



Impact on health



Impact on environment



Women empowered



Economic productivity