

CLEAN
COOKING
ALLIANCE



MARKET STRENGTHENING PROJECT

Annual Work Plan
January 1 – December 31, 2021



Ministry of Foreign Affairs of the
Netherlands

December 7, 2020

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ACRONYMS

BCC	Behavior Change Communications
B4IG	Business for Inclusive Growth
CCA	Clean Cooking Alliance
CCAK	Clean Cooking Association of Kenya
CCIF	Clean Cooking Investment Forum
CCIS	Clean Cooking Investment Series
CCSS	Clean Cooking Sector Strategy
COP	Conference of the Parties
CTI PFAN	Climate Technology Initiative Private Financing Advisory Network
DC	Demand Catalyst
DHS	Demographic and Health Surveys
EEP	Energy & Environment Partnership
EnDev	Energising Development
Eol	Expression of Interest
ESMAP	Energy Sector Management Assistance Program
EPA	Environmental Protection Agency
EQ	Enabling Qapital
GCF	Green Climate Fund
GD&P	Gender, Demand & Policy
GIZ	German Society for International Cooperation
GWNET	Global Woman's Network for the Energy Transition
HEPA	Health and Energy Platform of Action
HLPF	United Nations High-level Political Forum on Sustainable Development
IATI	International Aid Transparency Initiative
IEA	International Energy Agency
ISN	Implementation Science Network
ISO	International Organization for Standardization
LSMS	Living Standards Measurement Study
M&E	Monitoring and evaluation
MC	Market Catalyst
MECS	Modern Energy Cooking Services
NAMA	Nationally Appropriate Mitigation Action
NGO	Nongovernmental organization

NIH	National Institutes of Health
OECD	Organisation for Economic Co-operation and Development
PAYG	Pay-as-you-go
PS&I	Private Sector & Investment
R&D	Research and development
RM	Relationship manager
SBCC	Social behavior change communication
SDG	Sustainable Development Goal
SEforALL	Sustainable Energy for All
Spark+	Spark+ Africa Fund
TA	Technical Assistance
ToC	Theory of Change
UNF	United Nations Foundation
USAID	United States Agency for International Development
VC	Venture Catalyst
WEYA	Woman Entrepreneur of the Year Award
WHO	World Health Organization
WICC	Women in Clean Cooking

I. INTRODUCTION

Project Information

Project Name	Clean Cooking Alliance: Market Strengthening Project to build a stronger, sustainable clean cooking industry
Activity Start and End Date	May 1, 2019 – April 30, 2023
Name of Primary Implementing Partner	United Nations Foundation, Clean Cooking Alliance
Name of Primary Contact	Dymphna van der Lans, CEO Clean Cooking Alliance (CCA) 1750 Pennsylvania Avenue, Suite 300 Washington, D.C. 20036 DVanderlans@cleancookingalliance.org
Project Reference Number	4000002627
Major Counterpart Organizations	Host governments in Ethiopia, Ghana, Kenya, Nigeria, Rwanda, and Uganda. EnDev, World Bank, local clean cooking alliances and associations, and other development partners such as SNV, Norad, GIZ, MECS and HEPA
Geographic Coverage	Ethiopia, Ghana, Kenya, Nigeria, Rwanda, and Uganda

Project Description

The Market Strengthening project aims to develop a credible pipeline of sustainable, scalable, and investable clean cooking businesses that are able to attract capital to scale and replicate, accelerating the transition to cleaner cooking technologies that meet consumers' needs. Through this work, the project will help to build a stronger and more sustainable clean cooking sector while helping the Government of the Netherlands deliver on its goal to increase access to renewable energy globally. The four-year project will focus on strengthening markets in Ethiopia, Ghana, Kenya, Nigeria, Rwanda, and Uganda.

While this report occasionally references activities that will support countries outside of Sub-Saharan Africa and activities that promote LPG as a cooking fuel, funding from the Government of the Netherlands will only cover activities that support countries within Sub-Saharan Africa and that do not focus on LPG. The Clean Cooking Alliance (CCA) draws on other sources of funding including from Norad, Shell Corporation and Osprey Foundation to cover non-Africa and LPG activities.

The project has been constructed across three components which constitute the **Cooking Industry Catalyst** (CIC). Each focus on an important and interconnected element required to create a dynamic and financially sustainable clean cooking industry:

- **Venture Catalyst (VC)** focuses on improving the pipeline of investment-ready businesses through business-level interventions;
- **Market Catalyst (MC)** focuses on improving the enabling environment that helps such businesses succeed through market-level interventions;
- **Demand Catalyst (DC)** focuses on understanding consumers and driving demand through consumer-level interventions.

The Clean Cooking Alliance has made the two following modifications to the project's design since the previous workplan:

- **Monitoring and evaluation (M&E) indicators** have been revised on the basis of lessons learned during the first year of the project. The revisions reflect the project's more detailed design at the end of Year 1.
- **A learning activity stream** has been added to the project to capture and share project implementation lessons that would not otherwise be captured through planned studies, notably around technical assistance and grant funding activities.

This annual work plan covers the period from January 1, 2021 through December 31, 2021. A full report on the work conducted during this period will be presented on April 30, 2022, per the award agreement. The Gantt Chart outlining project activities against a timeline and a detailed budget and budget narrative are included in the Annex.

II. CURRENT SITUATION

A number of developments in Year 1 reinforced the need for continued support of innovative business models in the clean cooking sector, as well as for the ecosystem of actors and factors that support them. In spite of the COVID-19 pandemic, the sector also encouragingly continued to evolve toward high-impact solutions delivered through scalable and sustainable business models. These solutions and business models involve 1) the integration of technology, i.e. leveraging hardware and software-based technology to improve distribution efficiencies and enable consumer finance through various forms of pay-as-you-go consumer finance/lending schemes, 2) industrial-scale manufacturing, 3) fuel-based business models which generate recurring revenues, and 4) companies expanding their product ranges to include multiple fuel/technology types. While biomass, biogas, pellets, ethanol, and LPG stoves in certain contexts continue to dominate the innovative activity in the sector, there are also encouraging signs of increased interest in electric cooking devices.

In Year 1, several new start-ups entered the market, including two in East Africa with adaptations to existing business models that contribute to their financial sustainability. For example, one of these start-ups aims to import biomass pellets rather than making large investments in local production. This model has the potential to reach financial sustainability without the tremendous scale that would have been required by Inyenyeri, an important player that exited the market in late 2020. This development is encouraging as it demonstrates that lessons are being learned and that management teams are moving towards a more commercially viable direction. The fact that sophisticated impact-oriented venture capital investors seem to be convinced by the plans of these companies also bodes well for a continued broader transition towards commercial viability in the clean cooking sector.

However, Year 1 also brought unexpected challenges to the sector through the COVID-19 pandemic and the introduction of VAT policies in Kenya. The pandemic presents new challenges for industries around the world, and clean cooking is no exception. In April 2020, CCA administered a survey to companies, investors, donors, policymakers and other stakeholders working in the clean cooking sector to assess the impact of the pandemic. With over 300 responses, the survey found that 80 percent of investors responding to the survey delayed financing decisions, while 60 percent reported being less likely to support clean cooking enterprises as a result of COVID-19. Of the enterprise respondents, nearly one-third temporarily ceased all operations or planned to do so imminently. In addition, two-thirds of enterprises stated they were expecting moderate to severe disruptions due to COVID-19.

In Year 1, the reintroduction of VAT on clean cooking products in Kenya, including stoves, biogas and LPG was also a setback for the sector. The VAT reinstatement was introduced in the Finance Act 2020 as a reversal from the Government of Kenya's decision in 2016 to exempt clean cooking stoves and fuels from VAT. CCA supported the Clean Cooking Association of Kenya (CCAK) in submitting letters of petition to the Treasury, Parliament and various ministries and worked with GOGLA and others in the off-grid solar industry to align efforts where possible. However, the bill was passed in June 2020 and a 14% VAT has been reinstated on many clean cooking products,

effective July 2020. LPG was granted a one-year extension of zero-rating and so the effective date of the change in its VAT status is July 2021. This will have a significant impact on the industry in that it will increase prices for consumers.

Lessons learned during Year 1 shaped the project's Year 2 workplan. Project ramp-up procedures, team capacity constraints, and the pandemic contributed to longer implementation timelines and highlighted opportunities to adapt the project, while the composition of the VC portfolio and CCA's new Clean Cooking Sector Strategy process also identified opportunities to strengthen the project.

The composition of CCA's VC portfolio has informed and guided the project's needs in Year 2. The VC program now has a portfolio of 33 companies – engaged in eleven countries in Sub-Saharan Africa - which represent a cross section of clean cooking technologies and business models. In Year 1, CCA began to identify a pipeline of projects with VC portfolio companies that focus on increasing investment readiness, developing new products and services, and improving company operations. The pipeline is spread across technologies and geographies, and there is a predominance of innovative clean cooking-focused companies.

With such a large pipeline of companies being admitted to the VC, some Year 1 timelines were shifted due to ramp-up costs and internal capacity constraints. There was a predictable, but longer than expected, ramp-up phase to recruit four new team members, select and onboard VC companies, develop relationships with the management teams of each companies, and identify areas of collaboration and support under the VC. As the offerings to VC portfolio companies were designed to be flexible across the portfolio, effectively engaging with 33 distinct companies with unique needs has placed a degree of strain on internal resources, but has also produced important learnings. Some companies are positioned to absorb far more resources while others lack that capacity, sometimes due to circumstances outside their control such as the COVID-19 pandemic. Further, the internal processes that were put in place to ensure that best practices regarding resource allocation and procurement are followed, have required additional internal capacity.

The pandemic also caused major disruptions to other planned activities of the Market Strengthening project. CCA needed to adapt to working remotely in Year 1, which introduced short-term inefficiencies and required iterating around new organizational processes. Travel restrictions prevented in-person events, scoping and data collection missions, as well as engagements with VC companies and other stakeholders. The consultations for the policy strategy experienced delays as policymakers, NGO staff, and others were diverted to emergency response efforts and had to adjust to new work set-ups. Some activities did not occur while others were reimaged as online activities. The pandemic also presented new questions about how best to approach the Demand Catalyst and how communication approaches may need to be rethought, given limitations and changes to how people gather and communicate with each other.

M&E activities were revised and some Year 1 M&E activities were shifted to Year 2 for better sequencing with other project activities. As the project activities began to be implemented, CCA felt a need to revise some of the project indicators. The project's monitoring framework was subsequently developed based on these revised indicators. Baseline data was collected for some of the project indicators, and that data analysis should be completed by the end of 2020. However,

baseline data still needs to be collected for other project indicators. This data collection will occur in Year 2 to reflect the design of forthcoming Demand Catalyst activities.

The Clean Cooking Sector Strategy (CCSS) process, officially launched in mid-2020, also uncovered several opportunities for enhancing the Market Strengthening project. The CCSS aims to secure commitment and mobilize collective action toward achieving SDG 7—access to affordable, reliable, sustainable, and modern energy for all. The initial phase of the development process consisted of engaging a range of stakeholders to better understand their perspectives and to incorporate diverse voices into the process. One finding from the strategy process is that the sector struggles to learn and adapt effectively due to the absence of a learning mindset as well as a lack of a collective learning agenda and institutions to drive that agenda. Another set of findings relates to market knowledge. The sector still does not have a comprehensive understanding of what motivates significant dis-use of non-clean fuels alongside the adoption and sustained use of cleaner solutions. Highly localized and complex user preferences and markets are also poorly understood. Another set of findings relates to gaps in policy and advocacy. National governments need to do more to drive progress towards national transformations, aided by local champions and voters.

COVID-19 disruptions, ramp up costs, internal capacity challenges, and a shift in the M&E baseline approach all contributed to the postponing of certain activities to 2021. In addition, various activities, which depended on the rollout of VC projects, were not launched. These include activities in the Demand Catalyst which will need to reflect the geographic footprint, technologies, and business models of the VC companies and address the market challenges identified through the VC portfolio.

As a result of all of the factors described above, after receiving USD 6 million in Year 1 cash disbursements, the project is projected to have a positive cash balance of USD 4.3 million. The Year 2 workplan accounts for shifting timelines, the new global context under COVID-19, lessons learned from Year 1 and an adjusted budget.

III. PRIORITIES FOR 2021

In 2021, the Market Strengthening project will focus on adapting its programming to a COVID-19 world, optimizing project design, organizational processes and structures for efficiency gains, deploying two major project initiatives, launching new monitoring, evaluation and learning activities, and scaling up gender programming.

Adapting to COVID-19: Year 2 programming will be adapted to the realities of COVID-19, and the workplan assumes that the CCA team will continue to work remotely for the foreseeable future. The workplan is also designed under the assumption that there will be very limited travel and no public in-person events until there is a change in the global situation. Small in-person meetings may take place where and when they are compliant with local health laws and guidelines. Carrying out the project's activities will entail building up the team's capabilities to engage with companies and other stakeholders virtually and greater reliance on digital collaboration solutions. Adapting to COVID-19 will also require that the project place a heavier emphasis on partnerships to implement project activities that require local presence as well as build a stronger team presence in clean cooking markets in Sub-Saharan Africa.

Improving organizational efficiency: To make up for lost time in Year 1, CCA is currently exploring opportunities to streamline and optimize its engagement with the Venture Catalyst portfolio. The current VC portfolio engagement model aims to provide customized support to each company shaped by company-level project opportunities. However, thus far companies have exhibited varying capacity to absorb technical assistance and grants. As a result, a subset of portfolio companies that have demonstrated the highest level of readiness for project implementation have received more support than companies in the portfolio that are not yet well-positioned to receive support from CCA. In addition, the current portfolio is oriented towards companies that are most active in the sector and identify as clean cooking enterprises. Supporting companies that have lower capacity to absorb support as well as companies that are new entrants into the clean cooking industry but could be important actors within the value chain, will require more standardized delivery approaches that prioritize efficiency and value for money such as standard diagnostic tools to determine technical assistance priorities for each company and cohort approaches for building core business capacities such as sales or financial management. Finally, in Year 2, CCA will recruit more team members based in Market Strengthening focus countries.

Deploying two major project initiatives: Year 2 will see the first investments of the Spark+ Africa Fund (Spark+), and the Demand Catalyst. Over the past three years, CCA has initiated, supported, and promoted Spark+, a first-of-its-kind clean cooking sector-focused investment fund. Despite delays throughout 2020 due to COVID-19, it is making progress towards Board approval by its anchor investor, the African Development Bank. In Year 2, CCA aims to launch Spark+ together with its manager, Enabling Capital (EQ), a Switzerland-based impact fund management firm. Spark+ will play an integral role in financing companies being supported by venture-level and ecosystem-level activities under the Venture, Market, and Demand Catalyst interventions. Year 2 will also mark the launch of the Demand Catalyst. Activities under the DC are intended to

align closely with the Venture Catalyst and aim to support increased demand for the products being offered by businesses in the VC portfolio. Given the delays in the selection of the VC portfolio and the associated projects that CCA will support for the VC companies, the design process for the Demand Catalyst was delayed until Q4 2020. The CCA team will ensure that the interventions designed under the DC reflect the current COVID-19 context and are scalable within this context.

Launching new monitoring, evaluation and learning activities: In Year 2, CCA will roll out its revised indicators, collect the remaining baseline data, and launch a new learning activity. CCA will hire a firm through a competitive process to conduct the baseline for some of the project's indicators. To adapt to the COVID-19 context and increase efficiency, the selected firm will administer a rapid household mobile survey in select areas in Sub-Saharan Africa to collect the baseline data. Baseline data for all of the project indicators will be completed and analyzed by the end of Q1 2021. CCA will also hire a firm through a competitive process to launch a new learning activity. The aim of the learning activity will be to leverage the project's activities, tacit knowledge, and reach to understand and share insights on how change happens, or can happen, within clean cooking market systems in developing countries. The output of this activity will consist of case studies, frameworks, data, and ideas that can be used to inform the design and implementation of public and private initiatives in support of the growth of the clean cooking sector. The learning activity will last over the course of the remaining project timeframe, and all learning outputs will be publicly shared with stakeholders across the clean cooking sector.

Scaling up gender programming: In Year 2, CCA will implement and scale gender-responsive interventions that were seeded in Year 1 related to women leadership development, gender-informed business advisory support, and a gender-specific learning agenda:

- Over the course of Year 1, CCA focused on building the foundation to cultivate the leadership pipeline for women, as employees and entrepreneurs, by exploring and developing partnerships for professional development support. In Year 2, CCA will prioritize implementation of these partnerships to provide mentorship and leadership development programs to ensure women in the clean cooking sector are well poised for growth. By drawing leaders from the total talent pool, CCA believes that companies can tap into underutilized human and intellectual resources, leading to enhanced opportunities to drive innovation through greater diversity.
- In Year 1, CCA also focused on developing and refining its approach to providing gender-focused advisory support to businesses. A gender-informed approach helps companies understand the gender dynamics of every part of their business— from product design to production and distribution to operations and human resources. In Year 2, CCA will focus on providing gender advisory support to Venture Catalyst companies to help them understand and identify opportunities to ensure the unique needs and perspectives of both men and women are properly integrated across their business models and operations. In addition, as the Demand Catalyst ramps up in Year 2, CCA will also ensure a gender lens is applied to all consumer-facing efforts.
- Through the implementation of Year 2 gender activities, the CCA team will extract data and evidence that will showcase how adopting a gender lens can generate more

opportunities for women and help accelerate the transition to clean cooking. This will help CCA ensure that gender interventions provide clean cooking sector players with the knowledge and technical capacity to serve women’s needs and ensure that women, from entrepreneurs to consumers, are equipped with the resources and opportunities to participate in, and be solution makers, for the clean cooking market.

Table 1 provides an overview of key milestones that will occur during Year 2.

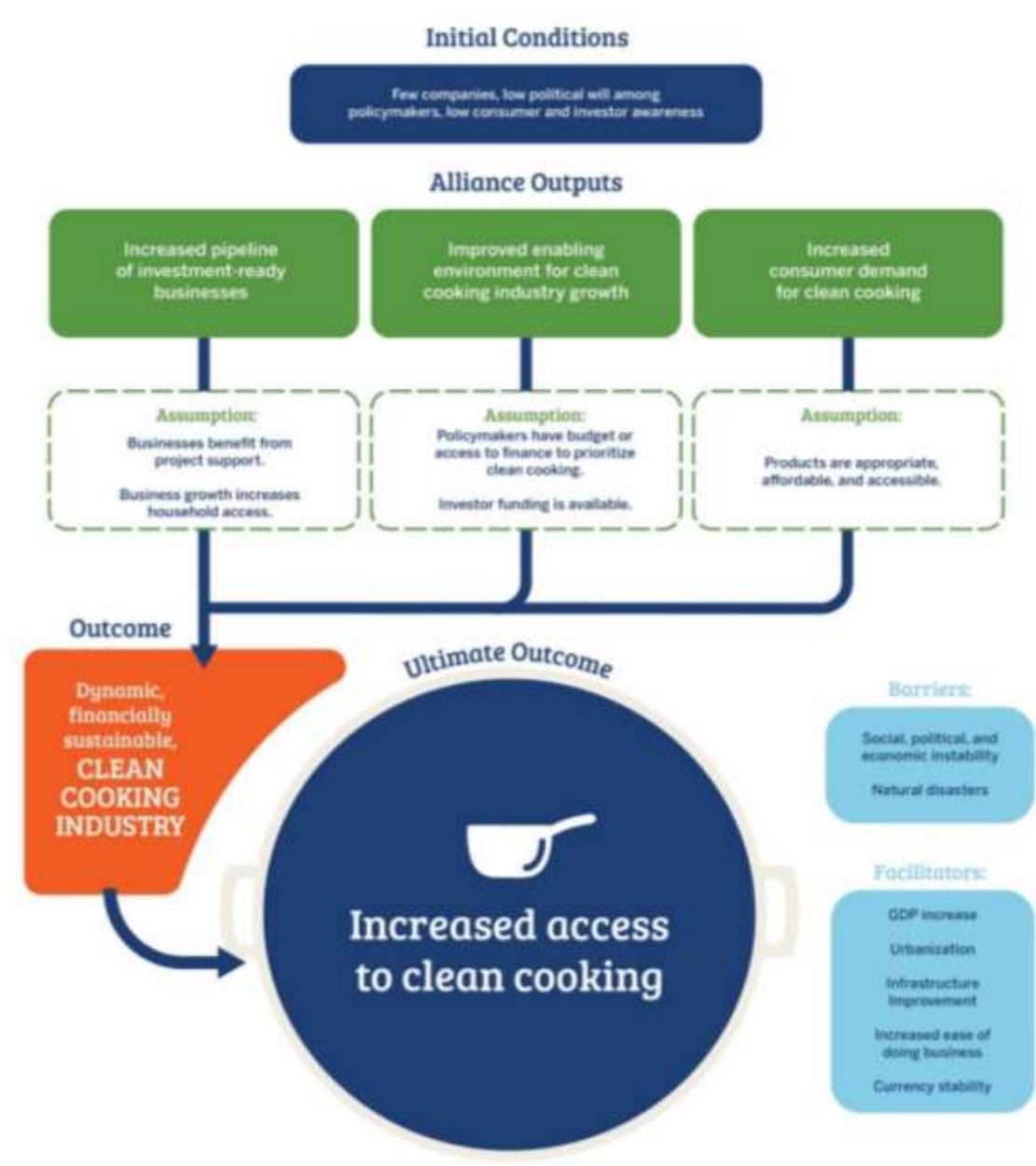
Table 1: Key Year 2 milestones

Key milestones	Program area
Q1	
Launch Gender Advisory Support offering	VC
Launch Women in Clean Cooking (WICC) Mentorship program	VC
Launch Spark+ Africa Fund	MC
Launch Health and Energy Platform of Action (HEPA) webinar series	MC
Finalize baseline data collection and analysis	M&E
Q2	
Launch pilot of Cooking Fuel Price Index	MC
Publish country market assessments	MC
Q3	
Launch sector value chain mapping on CCA website	MC
Clean Cooking Investment Series event	MC
Publish Kenya Cost Benefit Analysis & Policy Brief	MC
Launch Demand Catalyst activities	DC
Q4	
Launch 2021 Clean Cooking Industry Snapshot report	MC
Publish Global Literature Review on Pricing Instruments	MC
Launch Clean Cooking Policy Hub	MC
Host Clean Cooking Forum	MC
Launch Carbon Integration Tool prototype (for RBF)	MC

IV. RESULTS FRAMEWORK

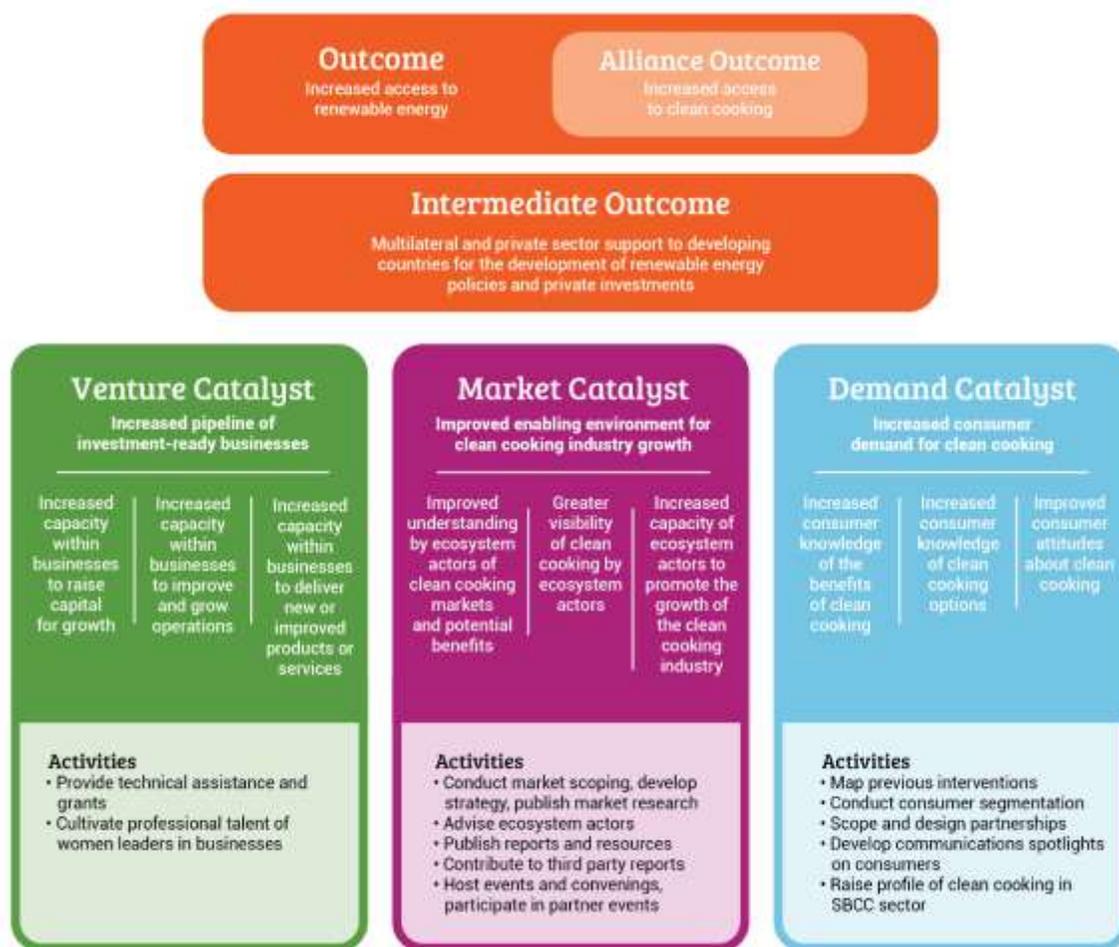
The project's Results Framework is based on its Theory of Change (ToC), and both remain unchanged from Year 1. The ToC shows the larger context that informs the project's strategic approach and is aligned with CCA's organizational ToC (see Annex 4). The project's ToC shows the initial conditions the project addresses. The three green boxes demonstrate the approach CCA will use to address the challenges. Several critical assumptions should be met, to some degree, to allow CCA's approach to be successful in achieving the desired outcome of a clean cooking industry. In addition, the project-level ToC also depicts the barriers and facilitators that can influence the project's work. These factors, outside of the project's control, may influence the ultimate outcome.

Figure 1: Project theory of change



The Results Framework shows a high-level visual depiction of the project’s approach to achieving increased access to renewable energy through increased access to clean cooking.¹ There are three components to CCA’s approach, as shown below.² The Venture Catalyst, Market Catalyst, and Demand Catalyst work in combination to strengthen the clean cooking industry, which brings in more support for clean cooking policies and investment into the larger renewable energy sector (the Intermediate Outcome). Full strategic descriptions of each of the three Catalysts can be found in the Technical Program section.

Figure 2: Project results framework



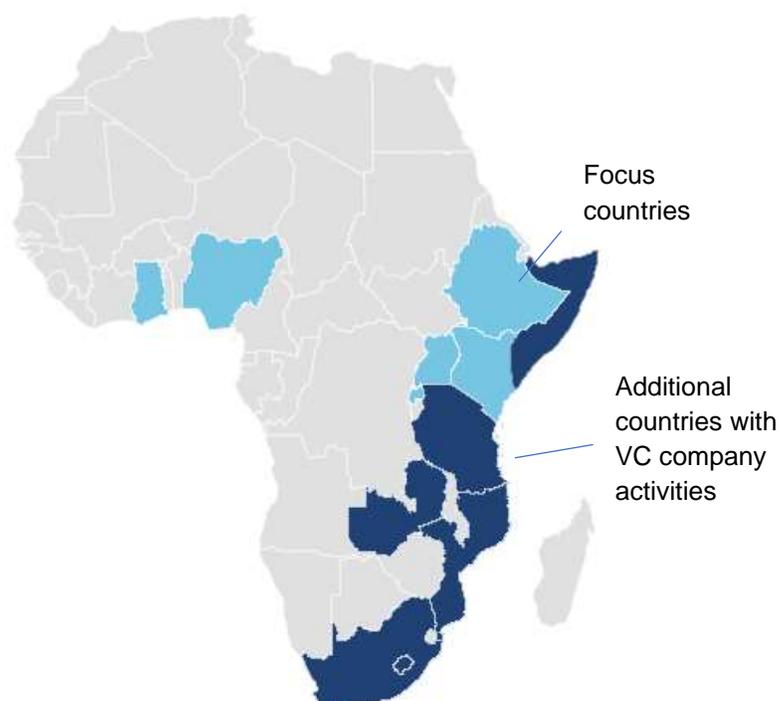
¹ The CCA outcome originally presented in the proposal (increased access to cleaner and/or more efficient cookstoves and fuels) has been simplified for the purposes of indicator measurement to 'Increased access to clean cooking.'

² The four pillars originally presented in the proposal have been condensed into three components, or Catalysts, given the overlap between the investor and policy-focused activities around increased information and targeted advisory support. These activities focus on policymakers, the investment community, as well as other ecosystem actors, and will all contribute to an improved enabling environment that will help the clean cooking industry grow.

V. GEOGRAPHIC FOCUS

The Market Strengthening project covers all Sub-Saharan Africa markets but will focus specifically on markets in six countries: Ethiopia, Ghana, Kenya, Nigeria, Rwanda, and Uganda. By the end of Year 1, the project had a footprint in six additional Sub-Saharan countries (namely Lesotho, Mozambique, Somalia, South Africa, Tanzania, and Zambia) through its VC portfolio companies, many of which operate in multiple countries (Figure 3). It is expected that in Year 2, VC portfolio companies will expand to additional countries.

Figure 3: Focus countries and countries with VC company activity



The VC will be focused on the project's six countries and include businesses that have activities elsewhere in Sub-Saharan Africa. While the Market Catalyst and Demand Catalyst will also concentrate on identifying and addressing market gaps in the six focus countries, it is expected that a share of MC and DC activities will deploy multi-country solutions that address market gaps beyond these six countries in order to leverage learning economies, network economies and economies of scale. The project anticipates that in order to reach a critical mass of markets and stakeholders, initiatives that extend beyond the six focus countries are needed. Examples of these initiatives include events linked to knowledge-sharing and networking, communities of practice, market platforms, market tools, and new initiatives such as Spark+.

VI. TECHNICAL PROGRAM

The activities for Year 2 outlined in this workplan will complement CCA's ongoing efforts to serve as a global convener, communicator, advocate, and knowledge base for the clean cooking sector.

The technical program is organized around three Catalysts:

- **Venture Catalyst** focuses on improving the pipeline of investment-ready businesses through business-level interventions;
- **Market Catalyst** focuses on improving the enabling environment that helps such businesses succeed through market-level interventions; and the
- **Demand Catalyst** focuses on understanding consumers and driving demand through consumer-level interventions.

Please note that some activities outlined in the Year 1 workplan have been completed and will not continue in Year 2. These activities have not been reflected in this workplan. As a result the numbering of workplan activities in this report is not continuous.

1. The Venture Catalyst: Improved pipeline of investment-ready businesses

Rationale

The Venture Catalyst is designed to establish proof points, or successful examples, of how clean cooking solutions—that people prioritize, want, and can afford—can be delivered in a financially viable way to consumers. These proof points reduce uncertainty and risk, and can help to catalyze the growth of an industry, as entrepreneurs and investors replicate and adapt viable business models for many markets and contexts, and new entrants find ways to optimize and generate further economies of scale. The entrepreneurs and investors that the project will engage are actors that are already active or potentially interested in emerging markets and seek viable commercial opportunities with social and environmental impacts.

Building a clean cooking industry will begin with a clear demonstration of commercial success, or the potential for such success, over time. The Venture Catalyst will diversify efforts across multiple business models, technologies, and markets to maximize opportunities to identify businesses and technologies that can indeed scale-up and become such proof points. Innovations and improvements in products, services and business models will be required to grow and scale the sector.

Approach

The Venture Catalyst increases the pipeline of investment-ready businesses by increasing capacity within businesses to raise capital for growth, to improve and grow operations, and to deliver new or improved products or services. This is largely done through technical assistance and grant funding. The project focuses directly on:

- Businesses and management teams with the potential for commercial success at scale;

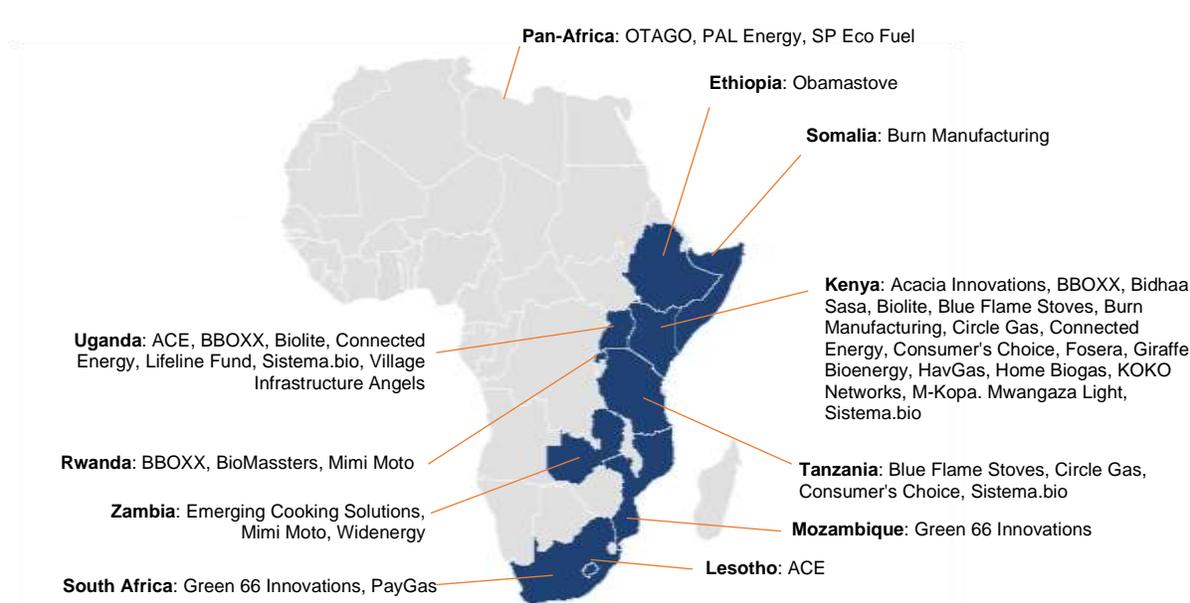
- Products, services and technologies that enable commercial success while also delivering robust social and environmental impacts; and
- Business models with clear potential for financial sustainability and scale.

Activities

In Year 2, activities to support the Venture Catalyst will include continuation of company-focused TA, delivered by CCA staff or external consultants, and complementary grant funding, which may focus on research and development (R&D)/innovation, investment readiness, or other areas relevant for businesses to demonstrate viability and an ability to raise capital for growth. Year 2 support will start with its initial portfolio of 33 companies active in 11 Sub-Saharan Africa countries (Table 2), namely:

- | | | |
|-----------------------------|------------------------------|---------------------------------|
| ▪ Acacia Innovations | ▪ Consumer's Choice | ▪ M-KOPA Labs |
| ▪ Africa Clean Energy (ACE) | ▪ Emerging Cooking Solutions | ▪ Mimi Moto |
| ▪ ATEC | ▪ Fosera | ▪ Mwangaza Light |
| ▪ BBOXX | ▪ Giraffe Bioenergy | ▪ Obamastove |
| ▪ Bidhaa Sasa | ▪ Green 66 Innovations | ▪ OTAGO |
| ▪ BioLite | ▪ Greenway Appliances | ▪ PAL Energy |
| ▪ BioMassters | ▪ HavGas | ▪ PayGas |
| ▪ Blue Flame Stoves | ▪ Home Biogas | ▪ Sistema.bio |
| ▪ Burn Manufacturing | ▪ Lifeline Fund | ▪ SP Eco Fuel |
| ▪ Circle Gas | ▪ IXL | ▪ Village Infrastructure Angels |
| ▪ Connected Energy | ▪ KOKO Networks | ▪ Wid energy Africa |

Table 2: Countries in Sub-Saharan Africa with VC company activities



Based on learnings from Year 1 the project will refine how this support is provided to companies by developing support models that are tailored to specific venture segments based on their differing support needs. These refinements will ensure that ventures across the portfolio are provided with the kinds of support that is most appropriate for their context, while ensuring that the project's resources are efficiently allocated.

1.1. Provide Technical Assistance and Grants

During Year 2, CCA will continue to deliver tailored TA and grants to businesses in support of their sustainable growth and investment readiness. This involves working with high-potential businesses on their business models and growth plans, supporting them to improve their operations, developing and executing fundraising and finance strategies, and identifying and integrating tailored gender-responsible business practices that contribute to growth and various other efforts to prepare for scale.

Based on the pipeline of projects identified during Year 1, TA and grants will continue to be provided across a wide range of technical areas including:

- Company Growth
- Corporate Finance
- Impact
- Legal and Government Policy
- Operations
- Product R&D
- Specialized Finance

These projects will continue to identify opportunities to contribute to the financial and social performance of VC companies and strengthen markets for clean cooking by demonstrating the opportunity for commercial viability. In addition, across these categories, the VC will incorporate the development of non-proprietary public goods in the form of market intelligence, frameworks and models, data and data platforms, and other resources that explicitly contribute to strengthening markets for clean cooking. Where applicable, the team will identify opportunities through the Market Catalyst mechanism to further develop these outputs to make them accessible to the sector systematically and at scale. These activities are described in the Market Catalyst section below.

Select Companies

The initial portfolio of companies was recruited in Year 1 via a public call for expressions of interest. This was followed by a selection process, and the onboarding of 33 companies.

In Year 2, the project will implement a rolling application process that will enable new companies to be added to the portfolio at any time. The VC project team will screen and assess applications from additional companies based on the same criteria as used in Year 1 while also considering these companies' fit with the rest of the portfolio and the team's capacity to support more companies. This approach will support improved alignment between evolving company needs and the project's financial and human resources.

Engage Companies

In Year 1 the project admitted a large pipeline of companies to the VC portfolio and implemented a flexible and adaptive approach to meeting these companies' diverse needs. In some cases, ventures had an active portfolio of projects and concepts that could readily absorb technical assistance and grant resources, and in other cases companies required more focused engagement to surface and develop these opportunities. Additionally, in some cases companies had external dependencies, such as travel and operational constraints from the COVID-19 pandemic, that limited the opportunity for productive collaborations.

In Year 2, the VC will identify opportunities to tailor the approach based on these insights. The approach will segment companies according to the support model they need. The CCA team will also standardize elements of how support is implemented to better target the project's resources. This right sizing approach will enable the project to engage more companies and provide greater value to those companies, while making best use of the project's resources and maximizing value for money.

The team responsible for work under the Venture Catalyst will scale its engagement with partners that focus on different segments or types of businesses, to ensure collaboration and linkages where relevant.

Strengthen Businesses' Capacity to Embed Gender-informed Business Approaches

In line with CCA's broader goal of ensuring gender is mainstreamed across the clean cooking sector, gender-focused initiatives are incorporated and integrated throughout the project. Businesses that are selected into the VC portfolio are eligible to receive advisory support on embedding gender-informed approaches into their business models. During consultations in 2019 for CCA's Gender Strategy, CCA discovered that gender insights are an underutilized asset in the clean cooking sector because companies lack the tools and resources to collect and utilize these insights.

In response to this, in Year 1, CCA devised a six-step gender advisory support process that will demonstrate how companies can unlock short to long-term opportunities that will enhance efficiency and social outcomes by leveraging gender insights. In Year 2, CCA will focus on implementing this process with select VC companies. The process consists of six steps: Baseline, Awareness, Analysis, Plan, Action, and Learn.

In the first step, CCA will administer a gender diagnostic tool, originally developed by Acumen, to assess how Venture Catalyst companies are currently integrating gender into their business operations. This tool serves as a baseline as well as a conversation starter, guiding discussions around gender interventions which can jointly improve business and social performance. Next, CCA will conduct customizable trainings to increase the staff's understanding of gender concepts and help them better understand why gender-informed business approaches can strengthen the overall business model. The third step will be a gender-informed value chain mapping and analysis exercise. During this stage, CCA, with the support of external experts, will administer a training that clarifies the roles men and women play along the company's value chain(s) and identifies key gender issues and bottlenecks.

Based on the trainings, analyses, and inputs from the company, CCA will co-create a Gender Action Plan with company staff and management. This plan will outline the goals the company

aims to achieve from a gender standpoint. Sample gender action plan activities include developing gender-informed marketing strategies and establishing workplace equity policies and practices that provide equal opportunities for men and women to be recruited, retained, and promoted. Following this stage, CCA will support companies to implement their identified gender-focused actions.

At the end of the engagement, CCA will re-administer the gender diagnostic tool to assess progress and work with the companies to co-create a business case study that documents learnings from the gender advisory support process. These learnings will be used to refine and improve CCA's gender advisory support offering and will be disseminated widely to support broader sector learning.

1.2. Cultivate the Professional Talent of Women Leaders within Cookstove and Fuel Enterprises

Another key gender objective for this project is to ensure a strong female talent pipeline for the clean cooking industry workforce. In Year 1 (November 2020), CCA launched the inaugural Women in Clean Cooking (WICC) Mentorship Program to provide targeted professional development support for rising women leaders in the clean cooking sector. This program was devised in collaboration with Sustainable Energy for All (SEforALL) and will be hosted by the Global Woman's Network for the Energy Transition (GWNET), which focuses specifically on advancing the role of women as change agents in the sustainable energy sector.

The 12-month program will target early to mid-career women working in the clean cooking sector and run through November 2021. It will include one-on-one mentoring, virtual networking opportunities, and carefully curated knowledge-transfer webinars and skill-building trainings for professional leadership and career advancement. The inaugural mentorship cohort will consist of 20 to 30 mentees who will be selected by CCA and SEforALL and carefully paired with mentors to ensure the goals of the mentee match the skills and experience of the mentor.

The opportunity is open to women from any clean cooking organization, but Venture Catalyst companies operating in Africa will be prioritized for CCA's support. SEforALL is providing equal financial support to the program and has prioritized women working in Asia. In 2021, CCA will provide continuous support to the program alongside SEforALL and GWNET.

Complementing this program, CCA will also encourage women energy professionals within the Venture Catalyst cohort to participate in GWNET's Women in Energy Expert Platform. This platform currently consists of over 1,300 members and offers free virtual networking events and informational webinars. CCA will promote the platform through direct engagement with VC companies and through its website and social media channels.

In Year 1, CCA also developed a new partnership with Vital Voices, a global movement that invests in women leaders who are solving the world's greatest challenges. CCA and Vital Voices identified the VV GROW Fellowship, which is a global business accelerator and leadership development program for women owners of small and medium sized businesses, as a potential opportunity for Vital Voices to support women in the clean cooking sector. VV GROW offers customized business skills training, leadership development, technical assistance, and access to networks.

Acceptance into the Fellowship is on a competitive basis, and CCA will plan to provide sponsorship to women from the clean cooking sector if they are selected. CCA has shared the

opportunity with women in its network and through social media. In October 2020, Vital Voices conducted an informational webinar on the program exclusively for women in clean cooking, which was attended by twenty-five women. Selection of the 2021 cohort will be announced in December 2020.

In Year 1, CCA had planned to conduct awareness-raising among women's professional networks in the focus countries, such as the Executive Women Network in Ghana and the Rwandan Association for Women in Science and Engineering in Rwanda. Due to COVID-19 travel restrictions and therefore the inability to develop these relationships, CCA did not prioritize this effort in Year 1. Given the likelihood of continued travel restrictions and limited bandwidth for this type of relationship development, CCA will explore the possibility of leveraging pan-African and regional initiatives, like the Network for African Businesswomen, to tap into professional networks.

By bridging access to a suite of global and local networks, CCA hopes to equip and empower women energy professionals through enhanced connections, collaborations, and opportunities.

2. The Market Catalyst: improved enabling environment for clean cooking industry growth

Rationale

The Market Catalyst (MC) component of the Cooking Industry Catalyst aims to strengthen the enabling environment for clean cooking market growth through ecosystem-level interventions. Through the MC, the CCA team seeks to address specific market failures that have inhibited progress towards achieving Sustainable Development Goal (SDG) 7 and to unlock additional resources that can accelerate industry growth. This includes, but is not limited to, addressing specific obstacles to growth for businesses linked to access to finance, access to markets, and innovation.

Approach

Through the MC, CCA aims to scale up its engagement with, and support for, stakeholders in the sector to achieve:

- Improved understanding by stakeholders of clean cooking markets and of their potential opportunities;
- Greater visibility of clean cooking by stakeholders; and
- Increased capacity of stakeholders to promote growth of the industry.

To achieve these goals, CCA generates market intelligence to address information asymmetries, develops policy briefs and other targeted tools, hosts curated convenings like the Clean Cooking Forum, and designs targeted engagements to support relevant stakeholders, such as investors, policymakers and ecosystem-builders. Efforts within the MC are closely coordinated with partners such as Energising Development (EnDev), the World Bank through the Energy Sector Management Assistance Program (ESMAP), Modern Energy Cooking Services (MECS), Health and Energy Platform of Action (HEPA), Get.Invest, and SEforALL to avoid duplication and ensure any resources developed complement one another's work.

As a major subcomponent of the Market Catalyst, CCA's policy work aims to support the establishment of a strong and predictable policy environment that facilitates greater access to clean cooking. In order to align its policy-focused efforts to the changing needs of the market and stakeholders, CCA undertook a process to develop a new, more comprehensive policy strategy in 2020. This strategy will inform CCA's policy approach globally, including within the six focus countries under this project (see Box 1).

Box 1: The Market Catalyst's approach to policy in 2021

In 2020, CCA completed more than 50 consultations with policymakers, local alliances, NGOs, and companies to inform the development of a new policy strategy. CCA synthesized findings from these consultations and identified four key themes: there is a continued need to make the case for addressing the clean cooking issue; data required for decision-making needs to be better packaged; lack of coordination continues to impede progress; and market friendly policies and strategies exist, but implementation of them has been slow due to lack of financing and capacity.

CCA used policy consultations' findings from Year 1 to develop a revised policy strategy that focuses on developing and disseminating knowledge products that clearly lay out the costs and benefits of various policy interventions and sharpen the case for taking action. CCA will continue to capture global learnings, provide clear, tangible recommendations for action, and continue to serve as a global advocate for the issue during Year 2.

Key activities for 2021 will include:

- Commission new studies that analyze the economic and social impact of policy interventions. Most immediately, this will include a Kenya-focused cost-benefit analysis of Value-Added Tax (VAT) and other taxes, as well as a global literature review of how taxes, subsidies, and other pricing interventions have been used to drive (or have stymied) broader energy access and similar sectors;
- Develop policy briefs outlining the results of the aforementioned studies, as well as additional briefs summarizing previous and ongoing research, including CCA's recently commissioned research on potential interactions between chronic household air pollution exposure and COVID-19. This will be done in close coordination with CCA's Evidence and Impact team;
- Support the Clean Cooking Association of Kenya (CCAK) in becoming a strong local advocate and explore support for other national cookstoves and fuel alliances;
- Create a Clean Cooking Policy Hub on CCA's website to include all new and existing tools and studies and outline current country policies for quick access by companies, policymakers and other stakeholders;
- Support the development and implementation of a HEPA-branded webinar series aimed at decisionmakers from both the health and energy sectors;
- Continue to serve as a global advocate for the issue by participating in platforms and events such as High Level Dialogue on Energy, G20, COP26, HLPF 2021, implementing the "Clean Cooking Is..." campaign, and pushing for the establishment of an International Day of Clean Cooking.

Activities

2.1. Conduct market scoping

As a critical first step in refining the design of the MC in 2019, CCA conducted an initial mapping of activities and resources being developed by other stakeholders to identify gaps and opportunities for collaboration. The scoping informed the plan for public good offerings developed in 2020 under the MC. Consultations with stakeholders will continue throughout the project, including through the Clean Cooking Sector Strategy process, to ensure that CCA's undertakings are relevant at the time of their development.

2.3. Publish market research

A key objective of the MC in Year 1 was to develop a set of market assessments for each of the project's focus countries that will outline the clean cooking market potential and growth opportunities. In early 2020, CCA compiled information from recent market studies conducted by other stakeholders (e.g. Clean Cooking Association of Kenya, ESMAP, and MECS) to identify gaps that CCA's market assessments could fill. Areas that seemed to be lacking from these reports included: detailed analysis and segmentation of the consumer landscape for clean cooking in each country, overviews and analyses of companies and their respective business models, and summaries of key policies affecting the markets.

CCA decided to draft the market assessment for Kenya first, given its relative wealth of data and activity around clean cooking, with the aim of using the Kenya assessment to guide the development of the remaining five market assessments. To this end, CCA developed a first draft of the company and policy analysis sections for the Kenya market assessment in Q2 of 2020 and contracted Fraym, a data firm specialized in hyperlocal mapping of geospatial data, to conduct a consumer segmentation for Kenya. Fraym's analysis included segmentation of the market into target groups based on urbanicity, consumption power, and primary cooking fuel; development of detailed profiles and sizing for each segment; and use of geospatial data to identify where these segments and overall demand are concentrated.

Over the following months, CCA gathered and incorporated feedback from internal teams and external stakeholders to further refine the Kenya market assessment. CCA conducted consultations with businesses (BBOX and PayGas) and investors (GAIA Impact Fund, Lowercarbon Capitol, and Acumen) to gather their reactions to the initial draft and ensure it responds to their needs (this was in addition to more informal discussions undertaken earlier in the year to guide the content). Incorporating this process slowed down the development of the assessments and pushed out the timeline for completion, but CCA felt that gathering this feedback was critical to further sharpen the content and ensure the assessments provide value to the sector.

Based on overwhelmingly positive feedback received by the businesses and investors, CCA will reengage Fraym in late 2020 to conduct additional consumer segmentations for Ethiopia, Ghana, Nigeria, Rwanda, and Uganda during Year 2. CCA has also contracted a design agency to develop a template for the market assessments to ensure that they are clean, modern, and uniform. Through the end of 2020 and early 2021, CCA will finalize the company and policy overviews for the remaining countries and work with Fraym to finalize the country-level consumer

segmentations. CCA anticipates that the six market assessments will be completed by Q2 of 2021, starting with the Kenya market assessment.

2.4. Engage with and advise ecosystem actors

Engage government

There is significant value to be gained through closer engagement with the public sector—both among implementing governments and various global actors, including donor governments and multilateral platforms. CCA will engage with public sector actors to identify opportunities to deliver targeted capacity building and other support based on specific needs.

In Year 2 a more robust strategy for supporting policymakers in the six focus countries will be outlined after the scoping and consultation process that was initiated in Year 1 is completed. The scoping examined the current policy landscape in each country, major gaps, and beneficial changes to be sought. The consultations identified opportunities for engagement and support for ministries beyond those typically involved in clean cooking programs, such as ministries of finance, planning, economic development, employment, industry, agriculture, health, and women's affairs. Consultations with policymakers will also ensure that the support provided meets the needs of these actors.

Activities to engage policymakers that have already been identified for Year 2 include the Health and Energy Platform of Action (HEPA) webinar series, a regional standards workshop series, and the Evidence to Policy Academy:

- **HEPA Webinar Series.** CCA had planned to conduct an East Africa regional workshop with policymakers in Q4 2020. This workshop was intended to be conducted in coordination with a previously planned International Organization for Standardization (ISO) workshop to disseminate updated clean cooking testing standards. Unfortunately, due to COVID-19 restrictions, the ISO workshop was postponed and is now being conducted virtually. Due to the limited bandwidths of participants in virtual convenings, CCA has decided that it will not combine efforts with the ISO virtual series. Instead, CCA is planning to partner with WHO and other HEPA members to host a HEPA-branded series of webinars that will engage policymakers, donors, investors, and other decisionmakers from both the energy and health sectors. The main objective of the webinar series is to showcase the latest evidence and tools on clean cooking—including cost-benefit analyses, case studies, and planning tools—to motivate and better equip these actors to undertake policy and funding decisions that can effectively support the clean cooking sector. The series is expected to be launched in early 2021 with webinars offered on a quarterly basis.
- **Standards Workshop Series:** In partnership with the US EPA, ISO, and WHO, CCA will be hosting a workshop series to help country delegations develop national action plans for adapting, adopting, and implementing the new ISO standards (including voluntary performance targets) for cookstoves. The workshop series will consist of virtual sessions conducted in Q1 2021, potentially followed by an in-person event in Senegal in Q4, 2021. The virtual meetings will help participants build a strong foundation of learning and enable participants to utilize potential in-person time in Senegal more efficiently and effectively. The virtual sessions will include two tracks, one on standards adoption and implementation and another on laboratory testing methods. The first track targets

policymakers, including representatives from standards bodies, ministries of health, environment, and energy, as well as enterprises and other ecosystem stakeholders. The second track targets technical staff from testing centers. The workshop series in 2021 will target francophone countries, including Benin, Burkina Faso, Burundi, Cameroon, Cote d'Ivoire, DRC, Gabon, Madagascar, Mali, Niger, Rwanda (one of the focus countries of the project), Senegal, Togo and Haiti.

- **Evidence to Policy Academy:** CCA will work closely with the US National Institutes of Health (NIH) Clean Cooking Implementation Science Network (ISN) to implement a Evidence to Policy Academy in which policymakers will participate in a series of virtual workshops and trainings on clean cooking. The series will seek to advance collaborative efforts and understanding among researchers, implementers, and policymakers with the overall goal of creating a strong enabling environment for the successful adoption and use of clean cooking technologies within the participating countries. CCA will work with ISN and other key partners including US EPA, USAID, and Vital Strategies to provide an interactive series that meets the needs of different countries by first determining each country's objectives and developing tailored plans for each country. Using the learnings from the Implementation Science Network and others, the CCA team will work to provide policymakers with the data they need, in a format they can use, to make informed policy decisions.

Engage industry, civil-society and other non-government sectors

In Year 2, CCA will continue to identify and prioritize active and prospective investors, investment intermediaries, market intermediaries (e.g. incubators and service providers), market-building entities (e.g. industry organizations, fuel-based organizations and donor-funded programs), and other market and civil society stakeholders based on their existing activity, stated interest, and possible ability to be convinced to enter the sector, as well as their ability to address key financing barriers or gaps in the ecosystem. A subset of this universe of stakeholders, those deemed to be of highest priority, will be assigned a CCA team relationship manager (RM) who will determine how best CCA can support them in helping to grow the clean cooking ecosystem. Options may include ad-hoc technical advice and support, sharing targeted market intelligence, inviting them to participate in CCA-hosted or partner events, connecting them with peers, in addition to other ecosystem actors and intermediaries, or providing seed grants to launch new initiatives that fill gaps in the clean cooking ecosystem.

Support activities will be initiated throughout Year 2 according to stakeholder interest and the viability of the activity. Activities that have already been identified for Year 2 involve support for the **Clean Cooking Alliance of Kenya** and support for the **Spark+ Africa Fund**.

- **Support to Clean Cooking Alliance of Kenya (CCAK).** A common theme from CCA's policy consultations during Year 1 was that CCA should focus on providing advocacy support in-country through local alliances. Given the urgent need in Kenya to continue to advocate for favorable tax policies, in Year 2 CCA will provide funding to CCAK to support the cost benefit analysis and leverage CCAK's capacities and existing relationships with the Government of Kenya to ensure CCA can successfully complete the study and ensure the findings are disseminated effectively. CCAK will use the findings from the analysis to develop and implement a strategic plan to advocate to the Kenya Parliament, National Treasury, and other key stakeholders for reconsideration of the VAT change and other

favorable tax policies. The support will run through the end of 2021 and will help to further establish CCAK as a strong local advocate and convener for the sector. CCA is coordinating with EnDev to ensure CCA's contribution will complement their support to CCAK. CCA will also use this engagement with CCAK as an example of how to strengthen and support local alliances in other countries and work with EnDev to share the learnings across different local alliances.

- **Support to the establishment of the Spark+ Africa Fund.** In Year 2, CCA will continue to support the launch of the Spark+ Africa Fund through technical assistance and grant funding. The US \$50-70 million Fund is expected to invest in financially viable, scalable businesses that deliver household cooking energy solutions. With a market opportunity-driven strategy, Spark+ will deploy primarily debt, with a minority window for equity and quasi-equity instruments, and will fill a gap in the financing landscape by pre-financing companies receiving grants through RBF initiatives such as RVO's SDG 7 Results Facility and the World Bank's Clean Cooking Fund. Spark+ is also aligned with and complementary to EnDev's country programs and Get.Invest's Finance Catalyst, as well as CCA's Venture Catalyst activities. Spark+ will focus on Sub-Saharan Africa.

Spark+ will be established as a Luxembourg general partner (GP) /limited partner structure, managed by Enabling Capital (EQ), with teams on the ground in Nairobi, Kenya and Accra, Ghana. A Dutch Stichting will be established to hold the shares of the General Partner. The purpose of the Stichting will be to vote on Fund GP board membership and to allocate grant funding received from CCA and other donors. Spark+ will not have a legal relationship with CCA or CCA's host the United Nations Foundation. In order to affect a first close, CCA will grant a share of the General Partner contribution, which is 1% of the total fund size. Further, for Spark+ to launch, during Year 2, CCA will also provide a grant for the establishment and operation of the Dutch Stichting.

Engage in global advocacy

In addition to these activities, CCA will also continue to serve as a global advocate for clean cooking by continuing the "Clean Cooking Is..." campaign, publishing stories in various media outlets and promoting the role of women leaders (Box 2).

Box 2: The Women Entrepreneur of the Year Award

CCA created the Woman Entrepreneur of the Year Award (WEYA) in 2016 to recognize outstanding female leaders in the household energy sector who are advancing clean cooking solutions in emerging markets. Winners of the WEYA receive special recognition at CCA events, financial sponsorship to attend a social entrepreneurship development course, and increased visibility and international recognition via CCA's newsletter, website, social media platforms, and other promotional materials. During Year 2, CCA will open applications for the 2021 award in Q2 with plans to announce the winner in Q4 at the Clean Cooking Forum.

In addition, CCA is also working with partners to establish a UN-designated International Day on Clean Cooking. This is expected to help mobilize political will and financial resources to address access to clean cooking at national, regional, and global levels. This effort was launched in November 2019 at the Clean Cooking Forum when a pledge was made by the Government of

Kenya to initiate the process to petition the United Nations. Since then, more than 20 organizations have signed on to support the effort, including CCAC, WHO, MECS and SEforAll. CCA will continue to advance this effort in 2021 with hopes of securing adoption at the 2021 UN General Assembly.

During Year 2, CCA will continue to participate in various global platforms aimed at driving action on energy access and clean cooking, including HEPA, the Multi-Stakeholder Technical Advisory Group on SDG 7 (SDG7 TAG), the United Nations Climate Change Conferences, COP26 and the G20 Energy Ministerial. CCA will be supporting the development of several technical tracks for the High-level Dialogue on Energy convened by Secretary-General António Guterres during the 76th session of the UN General Assembly in September 2021, in New York. The goal of the Dialogue is to raise ambition and accelerate action towards the achievement of Sustainable Development Goal 7 on energy by catalyzing innovative solutions, investments, and multi-stakeholder partnerships.

2.5. Publish reports and resources

Produce market insights

In Year 2, consultations with ecosystem actors will continue to ensure CCA's undertakings are always relevant at the time of their development. The list below represents the types of resources CCA believes will be useful to produce. Please note that this list is neither final nor exhaustive. Rather, it indicates the types of reports CCA expects to produce over the life of the project, several of these reports will be published during Year 2:

- **Clean Cooking Industry Snapshot.** A continued market insight priority for CCA in Year 2 will be the development of the annual Clean Cooking Industry Snapshot, with a release date slated for late 2021. The Snapshot, which was first released in 2019, is an annual publication that highlights investment and business model innovation in the clean cooking sector to illuminate progress toward a sustainable, private sector-led clean cooking industry. The 2019 Snapshot analyzed self-reported data on investment flows, business model growth, and financial performance provided by more than 40 clean cooking companies for the 2015–2017 period, and the 2020 Snapshot included data from 2018 and 2019. The report's scope includes industrially-produced biomass cookstove manufacturers; producers of biomass fuel for household use; distribution companies that sell stoves with fuels such as ethanol, pellets, and briquettes; prefabricated biogas system manufacturers and installers; and last-mile liquified petroleum gas (LPG) distributors that specifically aim to increase access for BoP consumers.
- **Technology Deep-Dives.** Given that business models and technologies remain highly nascent, and transparency into the financial viability and scalability of such models and technologies remains highly limited, in Year 2, CCA plans to develop and launch a series of "technology deep-dives", which focus on particular business models and/or technologies. They will highlight quantitative elements such as unit economics as well as qualitative analyses including successes, opportunities, challenges, and barriers. Possible topics may include biomass pellets, biogas, electric cooking, LPG, ethanol, char-briquettes, and industrial-scale stove manufacturing.
- **Financing Deep-dives.** Financing remains a challenge for the sector, which is struggling to demonstrate a path to robust growth and, over the longer-term, a degree of profitability.

However, many actors across the financing landscape—from commercial lenders to impact equity investors to grant-funders—are working on various innovative approaches and structures, such as the recently announced Clean Cooking Fund from the World Bank. CCA will seek to highlight various aspects of the financing landscape in deep dives it will publish in Year 2 and over the life of the project. Topics may include equity investment, debt financing, results-based finance, and crowdfunding, though more specific and innovative concepts are likely to be developed upon the launch of the Market Catalyst’s ecosystem-building engagements with financiers and financing intermediaries.

- **Company Case Studies.** The Market Catalyst will aim to leverage insights gained through the work of the Venture Catalyst and highlight industry leaders through the publication of company case studies during Year 2. CCA aims to publish and disseminate case studies of businesses it has been working with to share best practices and learnings with ecosystem actors.
- **Women Entrepreneurs Series.** Seeking to create a continual, sustainable method to elevate women’s stories, CCA launched the [“Women Entrepreneurs Series”](#) to regularly feature the unique experiences of women entrepreneurs in the clean cooking sector. The initial series of articles feature the top five finalists from the CCA’s 2019 Woman Entrepreneur of the Year Award. Three entrepreneurs have been profiled to date – Esther Altorfer, Managing Director of East Africa at Sistema.bio, Kalinda Magloire, founder of SWITCH S.A., and Happy Amos, founder of Roshan Global Services. These stories address critical questions, such as how to overcome challenges posed by COVID-19, and deliver lessons on how some businesses are achieving success. Through creation of social media graphics, partner engagement, and creating a specific web page for the series, these one-on-one interviews have received significant attention. CCA expects to continue the series through 2021 and beyond.

Develop market tools

In addition to the reports and resources described above, during Year 2 CCA will be involved in the development of several data platforms and other analytical tools that aim to fuel the growth of the clean cooking sector by increasing transparency and information flows. Several platforms and tools currently in development include a **carbon integration tool** that can help clean cooking businesses leverage carbon financing and results-based finance, **key performance indicators** for clean cooking businesses, a **cooking fuel price index** that CCA is advancing with partners, **a financing and funder platform** modeled on GOGLA’s robust database for the off-grid power sector, and an interactive clean cooking **stakeholder value chain**. Other potential tools to be developed include online scenario-planning tools and cost/benefit analyses for key components of industry development to inform policymakers. These tools seek to address information gaps within the sector, and as such will benefit greatly from collaboration with and building upon other similar efforts such as those being undertaken by SEforAll, the World Bank and others. CCA will continue to engage partners extensively in the design and development of these resources, sourcing and updating of data, and dissemination and use of these tools to further accelerate the growth of the sector.

- **Carbon Integration Tool:** In 2020 the CCA team began working with Connected Energy, a VC portfolio company, to support the integration of carbon methodologies into its biogas smart meter. This project aims to reduce the transaction cost for biogas system operators

to engage in carbon finance programs, and as a result, to make these programs more accessible to smaller operators. One of the reasons why engaging in these programs has high overheads is the lack of digital tools that facilitate integration of carbon emissions reductions processes, methodologies, and calculations. The Carbon Integration Tool will lay some of the groundwork to improved digitization of carbon integration by designing and submitting revisions to the methodologies, and producing an open-source component that implements processes, methodologies, and calculations related to carbon market integration specifically for biogas systems. The Carbon Integration Tool will reduce transaction costs and improve accessibility to sources of carbon finance for companies across the spectrum of clean cooking solutions. The development of this tool will involve four key steps:

- Expanding the core components that implement carbon emissions reduction processes, methodologies, and calculations to accommodate the full spectrum of clean cooking solutions;
- Designing and developing an online interface that implements key business use cases for integration with carbon markets that use these core components and is compliant with major standards agencies, Voluntary Gold Standard, and Clean Development Mechanism;
- Piloting the interface and core components with Venture Catalyst companies and in partnership with the major standards agencies; and
- Rolling out the final version to the broader clean cooking industry with the necessary data, tools, and support services in place.

It is expected that this work will begin in 2021 and will be completed in 2022. It is also envisioned that this platform and approach may be utilized by results-based financing (RBF) programs that incorporate health and gender co-benefits in addition to those specifically focused on carbon emissions reductions.

- **Key Performance Indicators (KPIs).** This activity intends to develop, pilot, and ultimately establish a sector-wide set of KPIs that provide greater transparency on the relative financial and operational performance of clean cooking businesses. The KPIs seek to tackle information asymmetries between investors and potential investees that are endemic to many clean cooking markets. Uncertainty around the relative performance of clean cooking businesses increases the sector's perceived level of risk, discouraging investors. Furthermore, a lack of performance transparency also hampers the potential for business improvement; clean cooking businesses currently have limited self-awareness on their operational strengths and weaknesses relative to peers. Outcomes of this activity will include a list of standardized KPIs for clean cooking enterprises. With a calculation methodology, the rationale for tracking each KPI, and what adjustments should be made in capturing it, is based on different enterprise business models. In Year 2, CCA will publish anonymized pilot data collected from clean cooking businesses.
- **Cooking Fuel Price Index (CFPI).** This activity consists of the development and piloting of a Cooking Fuel Price Index which captures and tracks prices of charcoal, wood fuel, LPG, electricity, and kerosene. The goal of the CFPI is to decrease the uncertainty around the price of cooking fuels in the market, which currently increases investment risk and leads to suboptimal pricing strategies in the clean cooking sector. This uncertainty reflects the search costs associated with local cooking fuel price competitiveness and related

information asymmetries between businesses and investors. The initial geographical focus of the project will be Nairobi, Kenya and will be initiated in Q2.

- **Financing and Funder Platform.** CCA will develop and launch an online financing and funder platform—which tracks active investors and grant makers, as well as funding flows—which can be used as an information resource and decision-making tool for sector stakeholders. It will provide funders and ventures with the information and tools they need to lower the risks involved in their decisions and reduce transaction costs. It will address market information gaps that hamper private sector funding due to limited demonstration effects and understanding of the investment landscape, limit existing sources of funding for clean cooking, and address funding needs unequally along the venture growth cycle. Year 2 will involve the prototyping of an online interface for creating and maintaining investor profiles, capturing information on clean cooking sector investment deals, and searching and reporting on investors and deal activity. It will also involve designing an investor database component as well as displaying information related to mission, investment scope and criteria, return expectations and investment terms, and other information relevant to businesses seeking investment, co-investors, or funders interested in channeling funds through such intermediaries.
- **Stakeholder Value Chain Map.** The clean cooking sector is a complicated environment. It is difficult for investors to keep up-to-date with the latest business model innovations, the sector needs to work better with actors from adjoining and overlapping sectors, and systematic learning across peers within the sector remains limited. The Stakeholder Value Chain Map aims to create an interactive map (a clickable framework) of clean cooking value chains and their associated stakeholders. In doing so, it aims to 1) more clearly articulate the clean cooking ecosystem to organizations not familiar with the sector, 2) showcase innovative business models and players to investors and potential partners and assist investors in their due diligence processes, 3) group sector peers to facilitate the systematic learning and sharing of emerging best practices, and 4) identify targeted opportunities for CCA to support industry development by aggregating common pain points and opportunities along value chains. This mapping will allow viewers to easily understand the entire sector, discover different business model innovations, and navigate to relevant content. The Stakeholder Value Chain Map is planned to be launched in Q3 of 2021.

Conduct policy analysis

In Year 2, CCA plans to develop two major policy analysis reports, the **Kenya Cost Benefit Analysis** and a **Global Literature Review on Taxes, Subsidies and other Pricing Instruments** in addition to smaller **policy briefs and tools**. These outputs will be featured in a new **Clean Cooking Policy Hub**:

- **The Kenya Cost Benefit Analysis.** In 2020, CCA worked closely with the Clean Cooking Alliance of Kenya (CCAK), Kenya Ministry of Energy, and other stakeholders to advocate against the reintroduction of VAT on clean cooking products in Kenya, including stoves, biogas, and LPG. The VAT reinstatement was introduced in the Finance Act 2020 and is a reversal from the Government of Kenya's decision in 2016 to exempt clean cooking stoves and fuels from VAT. CCA supported CCAK in submitting letters of petition to the Treasury, Parliament, and various ministries and worked with GOGLA and others in the

off-grid solar industry (VAT reinstatement was also proposed for solar products) to align efforts where possible. However, the bill was passed in June 2020 and a 14% VAT has been reinstated on many clean cooking and off-grid solar products, effective July 2020. LPG was granted a one-year extension of zero-rating and so the effective date of the change in its VAT status is July 2021.

This change will have a significant impact on the industry in that it will increase costs for companies and prices for consumers, and is therefore considered a major setback for progress on clean cooking in Kenya. In response, CCA commissioned an assessment in Q3 of 2020 of the likely impact the VAT change will have on the clean cooking market. The assessment kicked off in late 2020 and is expected to be completed in June 2021. It will include interviews and analysis with businesses and other stakeholders to determine the direct impact of tax changes for actors along the supply chain. It will also examine the various factors motivating the re-imposition of the VAT on clean cooking products. In addition, the study will include a model-based analysis of the costs and benefits of tax changes in terms of consumer demand, growth of businesses, and broader socio-economic impacts. Interim findings from the study will be released as they are completed to ensure they can be incorporated into the 2021 budget planning process in Kenya, which takes place during the first half of the year.

- **Global Literature Review on Taxes, Subsidies and other Pricing Instruments:** CCA has also commissioned a comprehensive global literature review to examine and document global best practice and learnings on taxation and other pricing interventions, such as subsidies for social goods and growing sectors, like clean cooking and broader energy access. This review will examine national experiences from countries such as Indonesia, Ecuador, and India, among others. It will also include a review of more specific and small-scale experiences that have attempted to rigorously evaluate the effects of subsidies for clean cooking products and fuels, e.g., in Cambodia, India, Ghana and elsewhere.

This work is expected to be completed by Q4 by researchers at Duke University and will be integrated as appropriate with Duke's Sustainable Energy Transitions Initiative, which has been reviewing the impacts of energy transitions and policies more broadly and comprehensively over the past 5 years. This work will provide an important addition to the understanding and evidence base for using pricing instruments to drive clean cooking access.

- **Gender in Energy Policy Framework/Tool.** Lastly, in 2020, CCA had planned to initiate the development of a policy tool or framework to support governments in designing gender and energy policies. This was inspired by the Kenya Ministry of Energy's Gender and Energy policy, which was launched in November 2019. CCA decided to postpone this initiative until CCA's new policy strategy was finalized. CCA will therefore launch this effort in the five other focus countries in early 2021 with an aim of completion by Q3 2021, and implementation with focus countries starting in Q4 2021. As a first step, CCA will conduct consultations with the Kenya Ministry of Energy's gender focal point and other relevant stakeholders to better understand how the policy was developed. CCA will then consult with relevant Ministry of Energy staff in the other five countries to share the Kenya policy and determine what type of support other countries would need to develop similar policies. CCA will also work closely with organizations such as ENERGIA who recently completed their assessments and published policy briefs on gender and sustainable energy access

in Kenya, Rwanda, Tanzania, and Uganda aiming to provide policymakers and practitioners with recommendations to effectively integrate gender in energy planning, implementation and monitoring.

- **Development of Additional Policy Briefs and Tools.** CCA will use the results from the studies outlined above to develop policy briefs that outline the key findings and recommend actions governments can take. The team will also work closely with CCA's Evidence and Impact team to develop briefs summarizing previous and ongoing research. This will include CCA's recently commissioned research on potential interactions between chronic household air pollution exposure and COVID-19 to be published in Year 2.

The team will explore opportunities to feature the briefs in the US National Institutes of Health (NIH) Clean Cooking Implementation Science Network (ISN), which plans to implement a clean cooking academy for policymakers where they will participate in a series of workshops and trainings on clean cooking.

- **The Clean Cooking Policy Hub.** The Hub will be developed alongside CCA's broader website re-design process, which was launched in Q3 2020 and is expected to be completed in mid-2021. The Hub will house new and existing policy-focused tools and studies and will outline current country policies (namely regulations and tax rates) for quick access by companies and other stakeholders.

2.6. Contribute to reports published by partners

Besides self-published reports and informational resources, CCA will continue to play a role in supporting partners with technical knowledge, market intelligence, and sector insights about clean cooking technologies, companies, demand creation campaigns, and policies. CCA will continue to play this role in Year 2 by contributing to the International Energy Agency (IEA) World Energy Outlook, the MECS State of the Sector report, the NY Declaration on Forests report, Practical Action's Poor People's Energy Outlook series, the REN21 Global Status of Renewables report, SEforAll's Energizing Finance series, the World Bank's Regulatory Indicators for Sustainable Energy (RISE) report, and the Global Distributors Collective's State of the Sector Report, among others. As the issue of clean cooking continues to be a priority on the global development agenda, and the industry continues to grow, CCA anticipates greater visibility within various publications related to energy access, impact investing, climate change, and other topics, in turn growing CCA's opportunities to provide valuable contributions to partner publications.

CCA will also work closely with global partners, including ESMAP, EnDev, MECS and HEPA, to develop joint briefs when appropriate. This is in line with consistent feedback received throughout the Year 1 policy strategy consultation process, namely that clean cooking advocates would be more effective if they approach decisionmakers with unified recommendations. CCA will also explore opportunities to develop briefs with local partners, such as CCAK and other national alliances as well as EnDev country offices. Briefs will be disseminated through CCA's various communications platforms, global partnerships platforms like HEPA, and through local partners.

2.7. Host events and convenings

CCA has proven to be the pre-eminent convener in the clean cooking sector and will continue to play this role. Under this project, it will focus on bringing together stakeholders relevant to building an industry at scale, including company management teams, investors, industry intermediaries,

policymakers, and others. These events and convenings will be additional to the stakeholder events planned around the CCA's Clean Cooking Sector Strategy which lie outside the ambit of the Market Strengthening project.

In particular, CCA will continue to host the **Clean Cooking Investment Series (CCIS)** as part of CCA's global efforts to drive engagement and investment in clean cooking solutions. Building on the Clean Cooking Investment Forum in 2018, the CCIS launched with a virtual event in Q4 2020 that brought together venture leaders, investors, donors, and other stakeholders to discuss innovative business models, financing approaches, and policy. The CCIS provided a platform for innovative businesses and offered investors and other stakeholders a comprehensive view of the sector landscape. As of now, the CCIS is envisioned as a series of virtual and in-person events. Hosting additional virtual events offers the possibility of lowering barriers to participation to allow for greater inclusivity, while also facilitating smaller and more focused strategic gatherings. For example, one large investment forum may instead be better executed as a series of virtual events, such as targeted investor roundtables or discussions on specific technical areas and business model innovations. The timing and relationship of in-person events during Year 2 relative to the **Clean Cooking Forum** (tentatively planned for Q4 2021), and as the COVID-19 pandemic will allow, is something which CCA is reconsidering to ensure maximum value for the sector. CCA may also consider a series of roundtables that are more locally tailored to the specific investment or finance hurdles and barriers in each market in which the project is working, with the aim of producing targeted recommendations for each market and to bring together a community that may not already exist around clean cooking.

In Year 2, CCA will continue to drive momentum for specific groups that are key to driving the clean cooking agenda such as women and youth:

- **Women's Entrepreneurship Webinars:** In Year 1, CCA sought to highlight the innovative work of women entrepreneurs in the clean cooking sector by creating a communications platform to share their work. This included a webinar in June 2020 to highlight the challenges facing women entrepreneurs in the sustainable energy sector amidst the Covid-19 pandemic and highlight their innovative responsiveness and adaptability. The webinar was hosted alongside Sustainable Energy for All, ENERGIA, and members of the People-Centered Accelerator and featured five women entrepreneurs representing business models ranging from solar lighting distribution to biodigester programs. The webinar was attended by over 350 people and was one of the most highly attended webinars CCA has ever hosted. This level of attendance was likely in part due to increased interest in virtual convenings due to the pandemic but was also likely driven by the combined outreach efforts and brand recognition of all three partners, which further highlights the power of collaboration with sector partners. Given the success of this webinar, CCA will plan to host two additional women-focused webinars in 2021—tentatively with the same partners— but will explore new partnership opportunities as well. This will include a webinar to highlight the progress of the WICC Mentorship Program.
- **SEforALL SDG7 Youth Summit:** CCA will co-organize the SDG7 Youth Summit in February 2021. The main objectives of this virtual event are to educate youth on the scope and importance of SDG 7 for global development; connect youth across the globe to networks, academic and career opportunities in the energy sector; and inspire youth to actively participate in achieving SDG 7 during the decade of action. The agenda will focus on delivering a set of events that collectively fulfil all the objectives above, including a panel discussion, thematic breakout sessions, a call for ideas or proposals, a virtual job

fair and a virtual academic fair. CCA will support the Youth Summit's clean cooking programming, with a particular lens around gender.

Lastly, CCA may host events specifically aimed at shaping policies by bringing together researchers and policymakers to discuss the latest evidence around the cost-benefit analysis of various technologies and interventions, the case for providing tax and duty benefits, and case studies from large-scale implementation programs. These events will be in addition to the standards workshop series presented further above under activity 2.4.

2.8. Participate in events hosted by partners

CCA has successfully leveraged events hosted by partners during the last several years to amplify its messages around clean cooking and to highlight its unique strategy to develop an industry capable of delivering clean cooking solutions sustainably at scale. During Year 2, CCA will continue to participate in investment-focused events, if scheduled, such as Social Capital Markets (SoCap), the Ashden Awards, the Global Impact Investment Network's (GIIN) Annual Conference, and Impact Days hosted by the Dutch impact investor network, Put Your Money Where Your Meaning is Community (PYMWYMIC). CCA will also focus on climate and renewable energy-focused conferences such as the World Bank's Energy Week, the UN's High-Level Energy Dialogue, COP 26, the IEA's annual World Energy Outlook consultation, Innovate4Climate (formerly Carbon Expo), and the International Renewable Energy Conference. Finally, it is important for clean cooking messaging and updates on the evolution toward a commercially viable industry to reach the Africa-focused investment network at events such as the Sankalp Africa Forum in February 2021, the Africa Financial Services Industry Conference (AFSIC) in May 2021, and the African Development Bank's Africa Investment Forum, which was scheduled for November 2020, but which will now be held in 2021.

It is expected that the majority of these events will be virtual in 2021, and there will likely be limited travel until Q3.

3. The Demand Catalyst: increased demand for clean cooking

Rationale

The Demand Catalyst (DC) is the third component of the Cooking Industry Catalyst. The objective of the Demand Catalyst is to increase consumer demand for clean cooking through communication-based interventions that elevate the issue of clean cooking among potential consumers and provide them with information about solutions. These efforts are designed to drive a behavioral shift in cooking practices and help prime the market for businesses. CCA achieves these objectives through consumer-facing awareness raising and behavior change campaigns, collaboration with partners to integrate clean cooking messages into complementary initiatives (e.g. nutrition and pneumonia programs), and the provision of marketing technical assistance to businesses.

Approach

Activities under the Demand Catalyst are intended to align closely with the Venture Catalyst and aim to support increased demand for the products being offered by businesses in the VC portfolio. While the VC ramped up in 2020, CCA focused its efforts under the DC on reviewing its past efforts on behavior change and gathering information and learnings from other behaviorally-

focused interventions in the six focus countries. CCA had intended to kick off the design process for the DC in Q3 of 2020, but given delays in the selection of the VC portfolio and the associated projects CCA will support for these companies, the design process was delayed until Q4. Design of CCA's activities under the DC will therefore continue into early 2021.

Activities

3.2. Conduct high-level consumer segmentation

To develop the strategy and partnerships for the Demand Catalyst's communication work, CCA began to conduct high-level segmentations of consumers in the six focus countries in 2020, starting with Kenya. The segmentations aim to provide CCA (as well as VC businesses and other stakeholders) with a better understanding of the consumer landscape in each country, including the market size and location of different segments.

As discussed in the MC section, this exercise was initiated in 2020 as part of the broader market assessment process. CCA commissioned a data consultancy firm to conduct a segmentation of the Kenyan market. CCA decided to hold off on commissioning segmentations for the additional focus countries until it could validate the value of the Kenyan market analysis with key audiences for the market assessments. Consultations with these audiences, namely businesses and investors, confirmed the value of this information and provided helpful feedback that allowed CCA to improve the presentation of the findings. CCA is moving forward with commissioning the segmentations in the five additional countries and expects them to be completed alongside the market assessments in June 2021.

3.3. Scope potential communication partnerships

A key priority for CCA in Year 1 was to gather insights and learnings from previous social and behavior change communication (SBCC) interventions undertaken in the six focus countries. To this end, CCA mapped and reviewed close to 20 interventions and conducted interviews with major implementers of SBCC interventions: DAI, FHI360, the Institute for Reproductive Health (IRH), Johns Hopkins University Center for Communication Programs (JHU CCP), John Snow, Inc. (JSI), Plan International, Population Services International (PSI), and Save the Children. While these implementers have typically focused on non-cooking issue areas (e.g. Water, Sanitation and Hygiene (WASH), Maternal, Newborn and Child Health, Nutrition, Malaria and HIV/AIDS), the review and consultations provided valuable information that will help further refine the design of Demand Catalyst activities in Year 2.

Many organizations emphasized the importance of utilizing social marketing, an approach that harnesses commercial sector marketing techniques to influence demand for products, services, and/or practices that benefit individuals and societies. The consultations also validated that implementing a "360 approach" to communication, which is a comprehensive strategy that surrounds a target group with mutually reinforcing message at various touchpoints, is the most effective method for driving behavior change. Furthermore, the consultations identified best practices for effective SBCC programming such as conducting a market segmentation, creating the right brand for communications and marketing, tailoring messages to specific audiences, linking supply and demand, engaging the government, and conducting regular evaluations. In addition, the mapping demonstrated the effectiveness of common SBCC approaches including

messaging through interpersonal communications, health bazaars or community fairs, school outreach sessions, and radio or television shows.

CCA developed a synthesis report of the key findings from the consultations, which it is using to inform the design of the Demand Catalyst for Year 2. These consultations were also used as opportunities to explore partnerships for joint programming and integration of clean cooking messaging into existing initiatives. Most implementers interviewed expressed willingness to explore integration partnerships with particular synergies identified with WASH and nutrition-focused interventions. CCA will remain engaged with these potential partners and further pursue and define partnerships as appropriate in 2021, as the Demand Catalyst activities are further refined.

In addition, the project will use the findings from the consumer segmentations to examine other potential communication partnerships through goods and service delivery channels, such as education and healthcare systems as well as potential influencers, such as celebrities and faith-based organizations. This scoping will be undertaken in 2021 as the segmentations are completed.

CCA continued to prepare for the Demand Catalyst design process by compiling and reviewing previous cooking-focused consumer studies as well as monitoring how cooking behaviors may be changing in the COVID-19 context. While the full impacts of COVID-19 are still playing out, there is anecdotal reporting of backsliding in unclean stacking behavior as disposable incomes reduce. On the flip side, many companies have reported an increase in demand for their products as people are cooking at home more often. Some companies have also reported that people are making the connection between pre-existing conditions from being exposed to air pollution and an increase in the severity of COVID-19 symptoms, which has driven greater interest in clean cooking products. CCA will continue to monitor these dynamics as it considers the design of DC activities for Year 2.

3.4. Design of partnerships and strategies per country

As mentioned, CCA had intended to kick off the design process for the DC in Q3 2020, but given delays in the selection of the VC portfolio and the associated projects CCA will support for these companies, the design process was delayed until Q4 2020. CCA has hired a design thinking expert to facilitate the design process and assembled a core team with representatives from across CCA's technical areas. The team will use the learnings from CCA's previous behavior change efforts, the SBCC review, consultations with companies, and broader commercial marketing and behavior change theory in the design process. During Year 2, the team will also consider where interventions would be most effective given the location and distribution footprint of VC companies, and therefore the accessibility of products. Lastly, the team will research and consider how intervention approaches may need to be adapted in light of the COVID-19 pandemic. CCA started the design process in Q4 2020 and aims to complete it in Q1 2021.

In late Q1 2021, CCA will use the outcomes of the design process to develop a competitive grant mechanism to identify and structure partnerships for consumer-facing interventions. CCA will aim to release a Request for Proposals in Q2, select partnerships in Q3, and launch said partnerships in Q4. CCA will focus on selecting partners with an existing footprint in the project's target populations in the six focus countries.

3.5. Understand business marketing and opportunities for support

This activity commenced in 2020 and will continue into 2021 as new businesses and projects supported under the VC are confirmed. While the Relationship Managers assigned to the companies lead the engagement and negotiation of projects, the DC team supports on TA projects related to marketing where applicable.

In addition, though CCA had planned to conduct consultations with VC businesses in 2020 to better understand how communication interventions can best complement and enhance business-level marketing efforts, CCA decided to postpone this effort to 2021 due to delays in ramping up the VC and kicking off the design of the DC. These consultations will be carried out in early 2021 once the initial stage of the design process for the Demand Catalyst is completed.

3.6. Develop communications spotlight series on clean cooking consumers

To further the understanding of what drives people to transition to clean cooking and ensure that the complex behavioral aspect of this issue is kept top of mind, in Year 1, CCA developed a human-interest communication series spotlighting individuals and families that have recently transitioned to clean cooking. The first [story](#) was published in April 2020 and follows the journey of a school kitchen cook that took part in a CCA program in Ghana (funded by the U.S. Department of State) that aimed to transition school kitchens to clean cooking. The second [story](#) in the series was published in Q3 2020 and follows the journey of a female stove entrepreneur in Kenya-- Charlot Magayi, founder of Mukuru Clean Stoves—as she navigates changes in consumer demand amidst the COVID-19 pandemic.

The project will continue to craft and publish these stories on a quarterly basis throughout 2021. The stories will be shared through CCA's social media channels and be featured in CCA's newsletters and on the website.

3.7. Raise profile of clean cooking within broader SBCC sector

The SBCC sector—which uses creative communication approaches to promote change in knowledge, attitudes, norms, beliefs, and behaviors at the individual, peer, family, community, and societal levels—is actively working across development sectors in the six focus countries. One of CCA's broad goals is to continue to engage and educate more SBCC researchers and implementers on the clean cooking sector through networking and participating in global conferences focused on social marketing and behavior change.

In 2020, CCA had planned to participate in the International SBCC Summit, which was postponed due to the COVID-19 pandemic. The Summit is currently slated for September 2021, and CCA will participate assuming international travel restrictions are lifted. CCA will also explore opportunities in 2021 to participate in virtual events hosted by SBCC-focused organizations.

Furthermore, CCA will continue to serve on an advisory group for a project—being undertaken by the Mind, Behavior, and Development (eMBeD) team at the World Bank—that is examining behavioral approaches to take-up of energy access technologies, including clean cooking products. CCA reviewed and provided feedback on its 2020 reports and will continue as an advisory group member as pilot initiatives under the project are launched. CCA and the eMBeD team have also made tentative plans for CCA to co-sponsor the launch of eMBeD's pilots in 2021.

In 2020, CCA also participated in the Business for Inclusive Growth (B4IG) partnership—an international coalition launched in 2019 and hosted by the Organisation for Economic Co-operation and Development (OECD)—which gathers 35+ member companies who have committed to developing better business practices for inclusive growth and to accelerate on-the-ground initiatives that bring concrete results for people and places left behind. One of the key pillars of the coalition is a series of ‘peer mentoring’ sessions, which address specific challenges of the accelerated initiatives and aim to generate broader insights and lessons that will be made open source. CCA participated in a session on building demand for social good products, which provided the opportunity to introduce participants active in the social marketing and SBCC sectors, including Unilever and Ogilvy, as well as corporates expanding their efforts into emerging markets, including Mars, Incorporated and AXA, to clean cooking. CCA also participated in a B4IG policy focused session and will continue to explore ways to engage in the initiative, as well as similar ones, in 2021.

VII. COMMUNICATIONS

In 2021 CCA will share updates, knowledge and insights through various means. Communications is expected to mainly take place digitally in the context of the COVID-19 pandemic.

Website and online presence

In 2021 CCA will launch a new website, which is expected to offer a more effective platform for communicating project results. In 2020, CCA's Advocacy & Communications team kicked off a full redesign of its website. As part of an initial "Discovery" phase, the team conducted research and held a series of interviews with internal and external stakeholders, gathering useful intelligence on how a new CCA site could better serve their needs and those of the sector broadly. CCA is now working through a "User Experience" phase that will result in the development of a sitemap and wireframe, based on previous findings, which will lead to site design, testing, and launch currently scheduled for July 2021.

As the website redesign process moves forward, CCA is also updating its current site to both streamline navigation and better showcase CCA's identity, work, and impact. The current site continues to serve as a strong resource for the sector, with regularly updated content, including news articles, reports, funding opportunities, jobs, and more, driving an increase in traffic of over 31% from 2019 to 2020.

Social media and email marketing

CCA maintains a significant presence across a range of digital channels, with over 31,000 total followers across all social media platforms (Twitter, Facebook, Instagram, LinkedIn, and YouTube). CCA's digital network of followers includes an effective nexus of high-level sector stakeholders, entrepreneurs, investors, donors, government representatives, and journalists. A new component of CCA's digital communications efforts developed this year is a partnership with Twitter, which included strategic counsel and a \$5,000 grant for promotional content. This has led to a significant boost in follower interactions and a 209% increase in average engagement rate since 2019.

CCA also continues to maintain its broad contact database, which currently includes more than 18,000 recipients globally. CCA's database is used strategically to engage constituencies around major news, surveys, events, and other happenings across the clean cooking sector, as well as to distribute the CCA newsletter. CCA will continue to deploy these communication tools during Year 2.

Blogs and thought leadership

In 2021 CCA will continue to blog and publish articles in strategically placed media channels and on its own website to push its thought leadership and influence actual and potential clean cooking funders, businesses, and governments. Blogs and articles will draw from CCA's 2021 publications as well as from learning that are captured through program implementation.

VIII. MONITORING, EVALUATION & LEARNING

M&E

CCA's approach to monitoring & evaluation (M&E) balances the needs of robust accountability with an agile and lean approach that allows for rapid course correction and learning. The project's Theory of Change (see Annex 3) and Results Framework are the foundation upon which the M&E of the project has been designed.

Measurement of the highest outcome level indicator 'Number of people who have gained access to cleaner cooking solutions will involve a combination of methods. As the Multi-Tier Framework data are collected infrequently, CCA will examine them where they exist. In addition, CCA will also examine any pertinent and recent data from the Living Standards Measurement Study (LSMS) from the World Bank and the Demographic and Health Surveys (DHS) from USAID that are available. Any pertinent MTF, LSMS and DHS data will be triangulated with other methods to obtain a clearer picture of access to clean cooking at the baseline and as the project progresses. These other methods include administering a rapid household mobile survey and analyzing CCA's Industry Snapshot survey and documents of supported companies.

People with increased access to clean cooking solutions will only include those using fuels for household cooking that come from renewable sources, namely solar, electricity from renewable sources, biomass, biogas, and alcohol fuels. Liquid petroleum gas (LPG) will be excluded, as it is not a renewable fuel.

CCA has revised some of the project indicators since the submission of the previous workplan (see Annex 4, which depicts the old and revised indicators). CCA felt the need to revise some indicators based on the lessons learned from the initial implementation of project activities. The indicators for the Demand Catalyst, however, are subject to further revisions as the activities for this catalyst are currently still being designed.

A table that outlines the monitoring framework of the revised project indicators is available in Annex 4. Data for the indicators will be collected only in geographies where relevant work for the project is conducted. This includes details on data sources, frequency of data collection, disaggregation etc. Supported companies, targeted consumers, and other stakeholders are the primary sources for data collection. Data collection methods will come from a variety of sources and include the Industry Snapshot survey, company documents, rapid household mobile survey, and other surveys.

CCA is currently in the process of analyzing baseline data for some project indicators, while baseline data for other indicators has not yet been collected. As certain project indicators were revised in Year 1, there was a delay in collecting and analyzing the relevant baseline data. Further, as activities for the Design Catalyst are still being developed, baseline data for the indicators pertaining to this catalyst remains to be collected. Due to these reasons, full baseline data collection and analysis could not be completed in 2020, but the project expects to collect this data

by the end of Q1 2021 through a rapid household mobile survey. Once the baseline data analysis is completed, CCA will set targets for the indicators.

Learning

A learning activity called *Market Strengthening Insight Harvesting and Dissemination* will be applied to the project in addition to data collection for the project indicators. This learning activity will address the project's three catalysts across Sub-Saharan Africa. Please note that specific budget lines for this learning activity have been distributed across the three catalysts and M&E activities.

The overall objective of this learning activity is to understand and share knowledge on how change happens, or can happen, within clean cooking market systems in developing countries. The output of this activity will consist of case studies, frameworks, data, and ideas that can be used to inform the design and implementation of public and private initiatives in support of the growth of the clean cooking sector.

The learning activity will be focused on theory-building to address specific knowledge gaps in the clean cooking sector as demonstrated through the work in this project. The activity is expected to use inductive research to move from specific observations to broader hypotheses and theories. The learning activity will consist of identifying, developing, packaging, and disseminating knowledge related to business models, consumer behavior, and market systems related to the clean cooking sector for the following audiences:

- Clean cooking businesses across the value chain
- Clean cooking investors and potential investors
- Clean cooking market enablers
- Governments and policymakers
- The Government of Netherlands and other international organizations and stakeholders
- The CCA team

The following forms of knowledge will be excluded from the scope of this activity:

- A priori knowledge which is not linked to the CCA experience (e.g. stand-alone literature reviews)
- Knowledge derived from deductive research, which tests theoretical postulates and ultimately leads to a confirmation

The main research methods that are expected to be used are interpretive methods related to exploratory and descriptive research. The research is expected to leverage experiential knowledge centered around CCA's current market-building project. Sources of knowledge will include:

- Interviews or workshops with CCA team members working on the three project catalysts
- Internal CCA documents, including outputs generated by supported companies, consultants, and team members
- Observation of external meetings, workshops, and fora
- Interviews with stakeholders
- Written inputs from CCA team members

- Ad hoc special research projects
- Evidence and data from outside of CCA

Large scale surveys, empirical evaluations, and field research will not be included as part of this activity.

The main deliverables resulting from the learning activity will be knowledge products, which will be packaged in a variety of forms according to their content, audience, and delivery channels. Illustrative examples of packaging include briefs, reports, blogs, event proceedings, CCA website stories, infographics, visualizations, videos, interactive media, podcasts, and presentations.

An external entity will be selected through a competitive process to conduct the learning activity.

IX. RISK ANALYSIS

Table 3 below outlines several key risks that may be anticipated in the execution of this project. CCA is committed to careful monitoring of all relevant risks. This project has been designed to mitigate those risks and will continually re-evaluate threats to the impacts of these activities. Further governance and oversight are described in the Operations section.

The table key follows:

- **Likelihood:** The chance a risk will occur within the period of support from the Government of the Netherlands.
 - Likelihood is separated into low probability (green), medium probability (yellow), and high probability (red).
- **Impact:** The impact of a risk on the outcomes of the project if said risk does occur.
 - Impact is separated into low impact (green), medium impact (yellow), and high impact (red).

Table 3: Risk analysis

RISK	LIKELIHOOD	IMPACT	MITIGATING ACTIONS
Businesses may fail to produce products that people can purchase at a price that enables the business to be “unit profitable”, resulting in weak demand and limited financial viability.			CCA recognizes that not all consumers will be able to afford all solutions. This project focuses on building a sector of commercial businesses, and as such will support businesses which have demonstrated product/market fit, which is highly dependent on consumer demand and affordability. Helping such businesses achieve scale will ultimately result in a greater number of solutions being offered affordably to more potential consumers. In addition, as part of the Market Catalyst component, CCA will advise governments on subsidies, tariffs, and other measures which can effectively create new markets by overcoming initial affordability challenges.
Despite demonstrating profitable unit economics, businesses may be unable to successfully scale, or convince investors they are likely to be able to scale, limiting their attractiveness as investment opportunities.			CCA will offer specialized support on the development and implementation of business strategies and growth plans, improving operations efficiency, growing teams and management information systems, accessing financing, and various other areas critical for efficient and profitable business growth to ensure that viable models are able to scale-up.
Businesses may fail to attract debt or equity financing from investors for the production and distribution of			CCA will work to help businesses overcome the barriers to accessing financing. CCA will focus on mitigating business model risks by

RISK	LIKELIHOOD	IMPACT	MITIGATING ACTIONS
clean cookstoves and fuels, limiting innovation and market growth.			<p>providing financial and technical support to businesses with the greatest likelihood to achieve scale and sustainability while helping them overcome barriers to scale.</p> <p>By catalyzing these businesses with capacity-strengthening and tailored TA, CCA will aim to unlock various forms of public and private investment and fuel the early stages of growth for businesses with the aim of enabling them to realize sustainable growth, ultimately with private capital.</p> <p>One of the most immediate and tangible opportunity to unlock both public and private investment is the blended capital facility Spark+ Africa Fund. CCA will ensure it engages intensively and extensively with the fund management team responsible for deploying Spark+ once it launches, which is currently expected to be in early 2021 with financial and technical support from CCA and the Market Strengthening project.</p> <p>Further, CCA will work with local governments to identify opportunities to mobilize domestic and public financing, such as through accessing various climate finance mechanisms like the Green Climate Fund (GCF), Nationally Appropriate Mitigation Action (NAMA) facilities, and other mechanisms. CCA will not seek to directly access funding from the GCF, but will instead work with government and multilateral partners to access financing mechanisms like the GCF..</p>
Stakeholders in the cookstoves and fuels value chain may not recognize the value of engaging women in the sector or the benefit of gender-responsive business models, which could reinforce existing inequalities.			<p>CCA will pair a gender specialist with selected businesses to develop gender-responsive business models and provide tailored training and TA. CCA will also conduct research on barriers for women’s empowerment and gender equality within the clean cooking sector.</p>
Category-level demand creation efforts are not successful in motivating people to seek out clean cooking solutions, and/or the solutions, particularly those offered by the businesses supported under this project, are not readily accessible to potential consumers.			<p>CCA will conduct comprehensive consultations with businesses active in the countries where demand creation efforts will take place to ensure alignment of target consumers, and the suppliers’ ability to respond to increases in demand. In addition, CCA will ensure that all demand creation efforts build upon extensive research and understanding of the target audience, as well as best practices from behavior change and marketing theory, to</p>

RISK	LIKELIHOOD	IMPACT	MITIGATING ACTIONS
			ensure maximum impact on consumer purchasing and behavioral decisions.
CCA may be unable to achieve buy-in from national governments in key markets, at both the political and technical levels, and to foster inter-ministerial coordination, which could limit sustainability and impacts in the long term.			CCA will leverage its existing relationships with key personnel at technical and political levels within relevant ministries and government agencies in the countries of focus under this project. CCA will also build up its expertise so that, together with existing knowledge and ability to advise on social and environmental impacts of clean cooking, it will allow to effectively advise policymakers on relevant enabling policies that will allow governments to achieve their clean cooking targets alongside broader economic development goals. CCA will also work with partners such as HEPA and SEforALL to engage in high-level political dialogues.
Political and/or financial developments in individual countries may limit foreign direct investment.			The COVID-19 pandemic, the ensuing global economic crisis and recent geopolitical developments, including the civil war in Ethiopia, have significantly increased the risk for financial or political turbulence to have a major negative impact on business performance, trade and investment in several countries. These realities are being considered during implementation and CCA will redirect its support to markets with a reasonable degree of stability and potential for investment while identifying new ways of engaging markets suffering from instability.
Prolongation of the COVID-19 pandemic			The COVID-19 pandemic has brought challenges to both the clean cooking sector and the implementation of the project due to travel restrictions, restrictions on in-person meetings and events, and shifting consumer demand. CCA will continue to operate under the assumption that there will be no immediate end to the pandemic, and will continue to build its virtual infrastructure and deploy virtual processes for engaging with the market and stakeholders. CCA will also continue to tailor its support activities to a COVID-19 environment.
Lack of investment: A new global financial crisis may limit the ability and willingness of companies and investors to invest in ventures in developing countries.			A continued global economic crisis is likely during the project's implementation phase. While there are no direct mitigation strategies for such an exogenous, macroeconomic shock, the effects of a possible global financial crisis will be monitored and considered together with

RISK	LIKELIHOOD	IMPACT	MITIGATING ACTIONS
			other global and country-level macroeconomic risks during the delivery phase of the project.
<p>Delay in baseline data collection: There could be delays to collect baseline data collection, for some indicators, through a rapid household mobile survey conducted by a selected firm.</p>			<p>CCA expects to hire a firm by end of 2020/early 2021 to conduct this baseline data collection in Q1 of 2021. If there are any unexpected delays in this timeframe then this baseline data collection and analysis will be completed in Q2 2021.</p>

X. OPERATIONS

Governance

As an initiative hosted at the United Nations Foundation (UNF), CCA is officially governed by UNF's Board of Directors, which maintains fiduciary responsibilities for CCA. UNF also provides CCA with operational support and maintains a seat on CCA's Leadership Council and Advisory Committee.

In addition to counsel from UNF, CCA has a Leadership Council composed of high-level global advocates working to ensure that no one's life is limited by how they cook. The CCA Advisory Committee—a smaller group of Leadership Council members comprised of leaders across private, public, and nonprofit sectors—provides strategic counsel to CCA and offers a diverse range of viewpoints critical to advancing partnerships, innovation, and impact in the clean cooking sector.

Project Management

The project is managed by the Chief Program Officer, Jean-Louis Racine, based in CCA's office in Washington, D.C., with staff distributed across Europe, Africa, and the United States. The finance and administrative structures of the project provide the Government of the Netherlands with clear and open lines of communication and robust, fully compliant systems.

CCA's project support team is comprised of the Chief Executive Officer, Dymphna van der Lans; Senior Director of Strategy & Development, Samiksha Nair; Senior Manager, Monitoring, Evaluation & Learning, Amy Todd; and Senior Director, Communications & Partnerships, Kip Patrick.

The project support team meets quarterly to monitor the project's progress and ensure smooth implementation. Quarterly progress meetings and regular touchpoints will ensure that the project support team is able to provide strategic guidance, manage the budget, and mitigate any risks. The project support team will provide operational oversight and project monitoring to ensure that the project remains on course and achieves the intended results.

In addition, the project staff will be supported by the following CCA staff:

- Kenny Pankey, Director of Finance, is responsible for managing and analyzing the project budget and financial reporting, including preparation of budget to actual reports, financial oversight, budget forecasting and audit engagements with third-party auditors.
- Charlenne Onyango-Obbo, Senior Manager, Operations & Compliance, is responsible for grants and contracts oversight, including liaising with UNF's legal and finance departments, maintaining timely administration and execution of grants, executing contract and payments, and supporting contract compliance.

Staffing

CCA brings together a team of technical and operational experts under the leadership of the Chief Executive Officer and Chief Program Officer to increase access to clean cooking solutions.

The staffing plan is presented below in Figure 6 and roles and responsibilities are further described in Table 4 below. This model ensures technical oversight, supportive project management, clear communication, and integrated crosscutting elements such as market intelligence, policy, and learning. The team's complementary roles reflect each individual's expertise and leverages decades of outstanding programmatic experience. Project staff salaries are funded through contributions from multiple donors.

Figure 4: Staffing plan

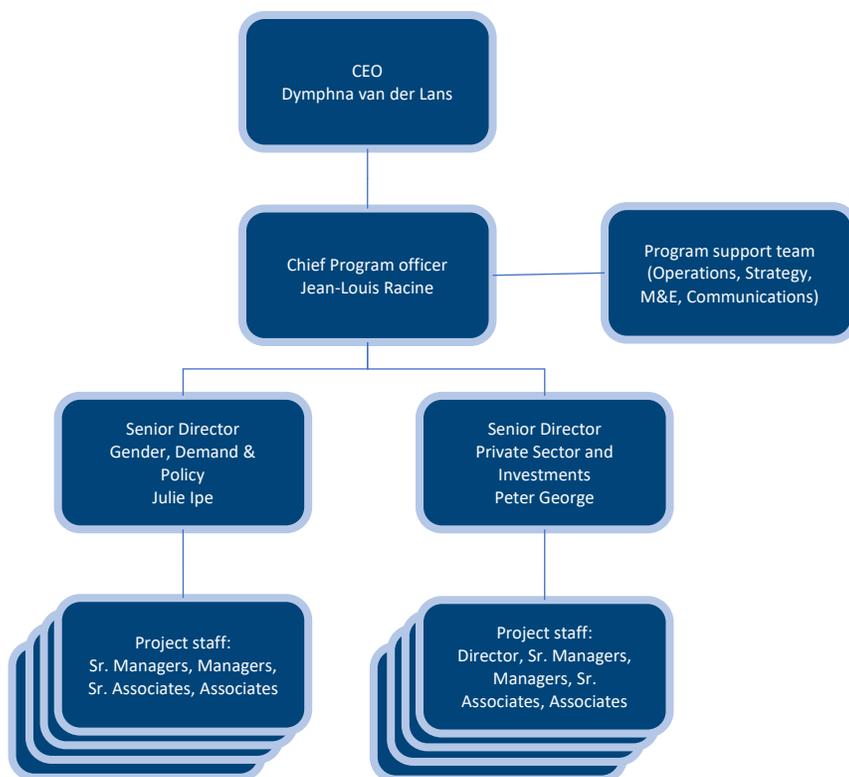


Table 4: Staffing roles and responsibilities

Position	Key Functions	Recruitment Status
Chief Program Officer	Responsible for the strategic leadership, managerial oversight, and operational maintenance of the project, and serves as the key point of contact for host country governments, Government of the Netherlands, and other ecosystem actors to build partnerships and promote synergies.	On board
Julie Ipe Senior Director, Gender, Demand & Policy (GD&P)	Responsible for providing overall strategic direction and technical leadership on demand and behavior change, gender, and public policy.	On board
Peter George Senior Director, Private Sector & Investment (PS&I)	Responsible for providing overall strategic direction and technical leadership on private sector, investment, and public policy (where it intersects with the private sector).	On board
Colm Fay, Director, PS&I	Responsible for overseeing internal processes related to the Private Sector & Investment team’s work. Serves as a VC relationship manager and provides leadership on Market Catalyst engagements. Reports to Senior Director, Private Sector & Investment.	On board

Position	Key Functions	Recruitment Status
Shrikant Avi Senior Manager, PS&I	Responsible for leading Venture Catalyst engagements and inputs to Market Catalyst engagements. Reports to Senior Director, Private Sector & Investment.	On board
Roberta Bove, Senior Manager, PS&I	Responsible for leading Venture Catalyst engagements and inputs to Market Catalyst engagements. Reports to Senior Director, Private Sector & Investment.	On board
Ronan Ferguson, Senior Manager, PS&I	Responsible for leading Venture Catalyst engagements and inputs to Market Catalyst engagements. Reports to Senior Director, Private Sector & Investment.	On board
Simba Mudimbu, Senior Manager, PS&I	Responsible for leading Venture Catalyst engagements and inputs to Market Catalyst engagements. Reports to Senior Director, Private Sector & Investment.	On board
Senior Manager, PS&I	Responsible for relationship management and execution of Venture and Market Catalyst engagements and initiatives. Reports to Senior Director, Private Sector & Investment. Also provides support on the Demand Catalyst.	Q1 2021
Senior Associate, PS&I	Responsible for executing Venture Catalyst engagements and Market Catalyst engagements. Reports to Sr Manager, PS&I.	Q1 2021
Associate, PS&I	Responsible for executing Venture Catalyst engagements and Market Catalyst engagements. Reports to Sr Manager, PS&I. Also provides support on the Demand Catalyst.	Q2 2021
Jescinta Izevbigie, Senior Manager, Gender	Responsible for leading gender and women's empowerment related activities. Supports gender mainstreaming across the project. Reports to Senior Director, GD&P.	On board
Hannah Chi Senior Associate, Demand and Behavior Change	Responsible for executing Demand Catalyst engagements and providing inputs to Market Catalyst engagements. Reports to Senior Director, GD&P.	On board
Asna Towfiq, Manager, Policy	Responsible for leading policy related activities under the Market Catalyst. Reports to Senior Director, GD&P.	On board

Partnerships

A key part of the Market Strengthening project's strategy is to leverage partnerships to enhance the reach, scope, effectiveness and efficiency of its activities. Table 5 provides a list of partners mentioned and their corresponding role in the Year 2 workplan, along with the current status of the partnership with CCA.

Table 5: Expected CCA Market Strengthening project partnerships in 2021

Partner	Activity (Project Area)	Partnership status
Africa Enterprise Challenge Fund	Support for mutual portfolio companies	Prospective
Ashden	Communications and global advocacy	Secured
Clean Cooking Association of Kenya (CCAK)	Advocacy and government engagement	Secured
COP26	Global advocacy events	Prospective
CTI PFAN	Events and support for mutual portfolio companies	Prospective
ENERGIA	Advocacy and promotion of women entrepreneurs. Co-host of Women's Entrepreneurship Webinar Series	Secured
Energising Development (EnDev)	Events and support for mutual portfolio companies	Likely
Energy & Environment Partnership (EEP)	Knowledge products and events	Secured
Energy Access Booster	Support on the selection of companies and for mutual portfolio companies	Likely
Energy4Impact	Finance and investment-related knowledge products	Prospective
G20	Global advocacy events	Prospective
GET.Invest	Events and support for mutual portfolio companies	Secured
Global Distributors Collective	Events, distributor-related knowledge products, communications, and global advocacy	Secured
Global LPG Partnership	LPG-related knowledge products, communications, and global advocacy	Secured
Global Woman's Network for the Energy Transition (GWNET)	Management of the WICC mentorship program	Secured
GOGLA	CCA Advisory Committee member, E-cooking and other mutually relevant knowledge products, communications, and global advocacy	Secured
Health and Energy Platform of Action (HEPA)	Advocacy and co-host of policy-focused webinar series	Secured
ISO	Regional standards workshop series	Secured
Liquid Telecom	PAYG system deployment in Africa	Prospective
LPG4SDG7	Pipeline development, financing, government advocacy, and knowledge products/communication (all focused on LPG)	Secured

Partner	Activity (Project Area)	Partnership status
Modern Energy Cooking Services (MECS) Programme	Knowledge products, communications, global advocacy, and Spark+ Africa Fund	Secured
National Institutes of Health (NIH) Clean Cooking Implementation Science Network (ISN)	Advocacy and dissemination of policy briefs through the ISN's policy academy	Secured
Network for African Businesswomen	Advocacy and promotion of women entrepreneurs	Prospective
Pivot Energy	Pipeline development, financing, government advocacy, and knowledge products/communication (all focused on ethanol)	Likely
Power for All	E-cooking and other mutually relevant knowledge products, communications, and global advocacy	Prospective
REN21	Knowledge products, communications, and global advocacy	Likely
SEforAll	CCA Advisory Committee member, knowledge products and global and national advocacy. Co-sponsorship of the Women in Clean Cooking (WICC) mentorship program and 2021 Youth Summit. Co-host of Women's Entrepreneurship Webinar Series	Secured
Shell Foundation	Pipeline development, financing, government advocacy, and knowledge products/communication	Secured
TaroWorks	Carbon finance for clean cooking companies	Secured
United States Environmental Protection Agency	Evidence to Policy Academy, and standards workshop series	Secured
USAID	Evidence to Policy Academy	Secured
Vital Strategies	Evidence to Policy Academy	Secured
Vital Voices	Advocacy and promotion of women entrepreneurs	Secured
Whitten Roy Partnership	Sales and marketing training	Likely
WiseHer	Mentorship and promotion of women entrepreneurs	Prospective
World Bank Energy Sector Management Assistance Program (ESMAP)	Finance and investment-related knowledge products, communications, and global advocacy	Secured
World Bank's Mind, Behavior, and Development (eMBeD)	Knowledge products, communications, and global advocacy on applying a behavioral lens to clean cooking	Secured
World Health Organization	Standards workshop series	Secured

Project Reporting

Table 6 below presents the reporting requirements for this project. In addition to formal and official reports, CCA is pleased to provide any additional information on the project at any time. In addition to the Government of the Netherlands' participation in CCA's quarterly donor calls, CCA can also provide verbal project updates via phone or in-person, whenever convenient.

Table 6: Government of the Netherlands reporting requirements

Type of Report	Period Covered	Deadline
Work Plan		
1. Annual work plan and annual budget	2019–2020 2021 2022 2023	1 Dec 2019 1 Dec 2020 1 Dec 2021 1 Dec 2022
Narrative Report		
1. Updates on progress in accordance with the IATI Standard described in the Ministry of Foreign Affairs' IATI Publication Deadlines	Periodically in accordance with the IATI standard	To be published in IATI no later than three months after the end of the quarter
2. An annual analytical narrative progress overview, drawn up in accordance with the IATI standards described in the Guidelines, to be published in IATI under “related documents/ document link,” specific requirement: Achievements per country, reporting on indicators, risks, and lessons learned.	1 May–31 Dec 2019 1 Jan–31 Dec 2020 1 Jan–31 Dec 2021 1 Jan–31 Dec 2022 1 Jan–31 April 2023	30 April 2020 30 April 2021 30 April 2022 30 April 2023 (Included in final report)
3. A final analytical narrative progress overview, drawn up in accordance with the IATI standards describe in the Guidelines, to be published in IATI under “related documents/documents link.”	Entire Grant Period	31 August 2023
Financial Reports		
4. Annual financial progress report specific requirement: expenses per outcome and a summary of travel, workshops, convenings, technical assistance and grants at the country level	1 May–31 Dec 2019 1 Jan–31 Dec 2020 1 Jan–31 Dec 2021 1 Jan–31 Dec 2022 1 Jan–31 April 2023	30 April 2020 30 April 2021 30 April 2022 30 April 2023 (Included in final report)
5. Semi-annual project audit	1 May 2019–31 Dec 2020 1 Jan 2021–31 Apr 2023	31 May 2021 31 May 2024
6. Final financial report	Entire grant period	31 August 2023

XI. BUDGET SUMMARY

Table 6 provides a budget summary while Annex 1 provides a more detailed activity budget and a budget narrative for 2021 as well as over the four years of the project.

Table 7: Budget summary

Revenue		Year 2
	Projected Rollover (Year 1 to Year 2)	\$ 4,358,940
	Planned Disbursement: Ministry of Foreign Affairs of the Netherlands	\$ 3,900,000
Cost Category		Year 2
	Staff Time	\$ 960,000
1	Venture Catalyst	\$ 720,000
2	Market Catalyst	\$ 962,500
	<i>Support to Spark+ Africa Fund</i>	\$ 100,000
3	Demand Catalyst	\$ 857,081
4	Monitoring and Evaluation	\$ 324,600
5	Project Management	\$ 35,000
	Subtotal - Direct Expenses	\$ 3,959,181
	Overhead (13%)	\$ 514,694
	Total Expenses	\$ 4,473,875

ANNEXES

ANNEX 1: Budget Details and Narrative

Introduction

The budget provided in Table 8/9 below outlines projected costs per activity over the four-year period, while Table 9 provides a detailed view of the updated Year 2 budget. In the updated budget, the line item naming and structure have been slightly revised from the Year 1 budget to more easily align with the activities detailed in the Year 2 workplan. Additionally, the budget timeline has been updated to align with the current workplan. The activity-level budget organizes expenses into the following categories:

- Grants and Consultants
- Professional Services
- Workshops, Roundtables, and Convenings

Travel has been included in applicable budget envelopes. The narrative below provides supplemental details regarding the updated budget.

Table 8: Four-year budget



Revenue		Year 1	Year 2	Year 3	Year 4	Total
Planned Disbursement: Ministry of Foreign Affairs of the Netherlands		\$ 6,000,000	\$ 3,900,000	\$ 3,400,000	\$ 700,000	\$ 14,000,000
Cost Category		Year 1	Year 2	Year 3	Year 4	Total
	Staff Time	\$ 1,147,271	\$ 960,000	\$ 1,322,000	\$ 640,000	\$ 4,069,271
1	Venture Catalyst	\$ 111,847	\$ 720,000	\$ 1,192,840	\$ 475,950	\$ 2,500,637
2	Market Catalyst	\$ 156,749	\$ 962,500	\$ 448,690	\$ 299,719	\$ 1,867,658
	<i>Support to Spark+ Africa Fund</i>		\$ 100,000	\$ 156,000	\$ -	\$ 256,000
3	Demand Catalyst	\$ 14,013	\$ 857,081	\$ 1,261,410	\$ 467,175	\$ 2,599,679
4	Monitoring and Evaluation	\$ 5,000	\$ 324,600	\$ 172,500	\$ 456,580	\$ 958,680
5	Project Management	\$ 17,385	\$ 35,000	\$ 49,220	\$ 35,850	\$ 137,455
Subtotal - Direct Expenses		\$ 1,452,266	\$ 3,959,181	\$ 4,602,660	\$ 2,375,274	\$ 12,389,381
Overhead (13%)		\$ 188,795	\$ 514,694	\$ 598,346	\$ 308,786	\$ 1,610,619
Total Expenses		\$ 1,641,060	\$ 4,473,875	\$ 5,201,006	\$ 2,684,060	\$ 14,000,000

Table 9: Detailed 2021 budget

	Revenue	Year 2
	Projected Rollover (Year 1 to Year 2)	\$ 4,358,940
	Planned Disbursement: Ministry of Foreign Affairs of the Netherlands	\$ 3,900,000
	Cost Category	Year 2
	Staff Time	\$ 960,000
1	Venture Catalyst	\$ 720,000
1.1	Provide technical assistance and grants	\$ 675,000
	Grants & Consultants	626,000
	Professional Services	49,000
1.2	Cultivate the professional talent of women leaders within cookstove and fuel enterprises	\$ 45,000
	Grants & Consultants	35,000
	Professional Services	10,000
2	Market Catalyst	\$ 1,062,500
2.1	Conduct market scoping	-
2.2	Develop strategy for public good offerings	-
2.3	Publish market research	\$ 63,500
	Grants & Consultants	60,000
	Professional Services	3,500
2.4	Engage with and advise ecosystem actors	\$ 209,000
	Grants & Consultants	103,000
	Workshops, Roundtables, and Convenings	106,000
2.4.1	Support to Spark+ Africa Fund	\$ 100,000
	Grants & Consultants	100,000
2.5	Publish reports and resources	\$ 515,000
	Grants & Consultants	490,000
	Professional Services	25,000
2.6	Contribute to reports published by partners	-
2.7	Host events and convenings	\$ 150,000
	Workshops, Roundtables, and Convenings	150,000
2.8	Participate in events hosted by partners	\$ 25,000
	Workshops, Roundtables, and Convenings	25,000
3	Demand Catalyst	\$ 857,081
3.1	Map previous behavior change interventions	-
3.2	Conduct high-level consumer segmentation	-
3.3	Scope potential communication partnerships	\$ 62,500
	Grants & Consultants	62,500
3.4	Design partnerships and strategies per country	\$ 777,581
	Grants & Consultants	777,581
3.5	Understand company marketing and opportunities for support	-
3.6	Develop communications spotlight series on clean cooking consumers	\$ 1,000
	Professional Services	1,000
3.7	Raise profile of clean cooking within broader SBCC sector	\$ 16,000
	Grants & Consultants	16,000
4	Monitoring and Evaluation	\$ 324,600
4.1	Baseline	\$ 274,600
	Grants & Consultants	274,600
4.2	Rapid M&E Surveys	\$ 30,000
	Grants & Consultants	30,000
4.3	Endline	-
4.4	Interim Learnings	\$ 20,000
	Grants & Consultants	20,000
5	Project Management	\$ 35,000
5.1	Global Communications	\$ 15,000
	Professional Services	15,000
5.2	Project Management	\$ 20,000
	Professional Services	20,000
	Subtotal - Direct Expenses	\$ 3,959,181
	Overhead (13%)	\$ 514,694
	Total Expenses	\$ 4,473,875

Staff Time

Staff time consists of direct salaries and applicable benefits for Market Strengthening project staff based in the United States, the United Kingdom and Africa. Staffing needs in support of each project activity are consolidated in this section.

Venture Catalyst

Under the Venture Catalyst component, the majority of the non-staff costs over the four-year period will be captured through grants and technical assistance contracts to support enterprises (\$2.4 million). Workshops, roundtables, and convenings will also take place over this period, but costs will be limited by travel restrictions. To provide support to the enterprises, in-person engagement will be required although travel is expected to be limited during the COVID-19 pandemic. The non-staff time costs associated with this engagement are reflected in the international and regional travel line items, although these costs will be affected by the COVID-19 context.

Additionally, the budget outlines costs associated with convenings aimed at cultivating the professional talent of women leaders within cookstove and fuel enterprises, among other areas. The workshop and convening costs within this section include limited venue costs, staff travel, participant support costs, and associated services.

Market Catalyst

Under the Market Catalyst, CCA anticipates engaging consultants to support activities around publishing market research (2.3), engaging and advising ecosystem actors (2.4), and publishing reports and resources (2.5). Though much of this work will be carried out by CCA staff (reflected in the staff time line item), outside expertise will be engaged to support efforts, such as gathering market intelligence and writing technical reports and briefs. The professional services costs associated with the Market Catalyst are comprised of expenses related to the design and production of published market research (2.3) and published reports and resources (2.5). Additionally, under Activity 2.5, the cost associated with contracting a firm to assist with developing, updating, and maintaining the various data platforms (related to investment, policy, etc.) are captured.

Under the Market Catalyst, cost assumptions around hosting (2.7) and participating in (2.8) events and convenings have been reflected. CCA anticipates hosting roundtables, workshops, and convenings over the four-year period. In addition, Activity 2.7. includes the anticipated expenses related to the bi-annual Clean Cooking Forum (Years 2019 and 2022) and the bi-annual Investment Forum (years 2020 and 2022). As with all activities, the project anticipates a need for international travel and regional travel to support these events, workshops/convenings, and report production. Travel needs have been reflected in all applicable activity line items.

Demand Catalyst

Under the Demand Catalyst, CCA anticipates engaging consultants to support high-level consumer segmentation (3.2), and professional service firms to assist with on-the-ground scoping efforts of potential communication partnerships (3.3). The communications spotlight series on clean cooking consumers (3.6) will be supported by CCA directly. To carry out these activities, there will be a need for communication staff travel internationally and regionally as well as professional services associated with the production and distribution of the spotlight series.

Much of the costs associated with the Demand Catalyst are captured in the design of partnerships and strategies for each country (3.4) and raising the profile of clean cooking within the broader SBCC sector (3.7). In section 3.4, the grant and consulting costs reflect activities such as formative research, target audience scoping, and consultations in Years 1 and 2. In Years 2 to 4, the project has anticipated costs associated with executing demand activities in the region, informed by Year 1 and 2 findings.

Monitoring & Evaluation

For Years 2 and 4, much of the M&E costs pertain to engaging a firm to support baseline and endline data collection and analysis. Therefore, the M&E budget will support a firm to conduct a rapid household mobile survey in Years 2 and 4 to collect baseline and endline data. Other M&E costs in Years 2, 3, and 4 will relate to support from CCA's M&E team members (and any potential consultants) to the project's M&E activities and the project's team members as required, along with the learning activity.

Project Management

Much of the project management costs will be included in the staff timeline item. However, this section includes costed line items to support professional services around the design, development, and distribution of Africa Market Strengthening communications materials (5.1). Additionally, the project anticipates the need for project management staff to travel to the region annually (5.2) to support efforts related to the oversight of the Africa Market Strengthening project.

2.5	Develop and publish reports, resources and tools				
2.5.3	Cooking Fuel Price Index				
2.5.4	Industry Snapshot				
2.5.5	Kenya cost-benefit analysis				
2.5.6	Financing and Funder Platform				
2.5.7	Recruitment platform				
2.5.13	CEO Interview Series				
2.5.16	Innovative LPG distribution business model comparison				
2.5.17	LPG value chain analysis in DRC				
2.5.18	OGS distribution article				
2.5.19	CC industry jobs analysis				
2.5.20	Stakeholder Value Chain mapping				
2.5.14	Woman Entrepreneurship Article Series				
2.5.22	Woman Entrepreneur of the Year Award				
2.5.23	Other business and finance-related case studies, articles and reports				
2.5.24	Develop Carbon Integration Tool				
2.5.25	Develop Key Performance Indicators				
2.5.26	Promote gender in energy policy framework/tool for Ethiopia, Ghana, Nigeria, Rwanda, and Uganda				
2.5.27	Global Literature Review on Taxes, Subsidies and other Pricing Instruments				
2.5.28	Policy Briefs				
2.5.29	Clean Cooking Policy Hub				
2.6	Contribute to reports published by partners				
2.6.1	Coordinate with ecosystem actors on upcoming reports				
2.6.6	Contribute to sector reports				
2.7	Host events and convenings				
2.7.1	Clean Cooking Forum 2021				
2.7.4	Webinar series to highlight the work of the CIC				
2.7.5	Clean Cooking Investment Series				
2.7.7	Additional events and convenings, with strategic consideration given to timing, location, and objectives				
2.7.8	Clean Cooking Investor Roundtable series				
2.7.9	Women's Entrepreneurship Webinars				
2.7.10	SEforALL SDG7 Youth Summit				
2.8	Participate in events hosted by partners				
2.8.1	Identify and prioritize attending events where CCA will bring value				
2.8.2	Speak/present at energy access, global development, impact investment and other relevant events				
Demand Catalyst	Increased demand for clean cooking				
3.2	Conduct high-level consumer segmentation				
3.2.2	Procure outside support, as a part of the market research (see section 2.3)				
3.2.3	Analyze findings from high-level consumer segmentation				
3.3	Scope potential communication partnerships				
3.3.1	Conduct mapping of communication and goods and services channels reaching target audiences				
3.3.2	Identify potential key influencers and champions				
3.3.3	Identify priority list of partners through research and stakeholder consultations				
3.3.4	Conduct assessments of potential partners to determine their suitability and understand their needs and terms				
3.3.5	Identify partners based on the results of each assessment				
3.4	Design partnerships and strategies per country				
3.4.1	Analyze findings from market scoping activities to identify target areas and communication resources needed				
3.4.2	Conduct consultations with partners				
3.4.3	Evaluate formative research needs				
3.4.4	Develop strategy for initial round of campaign(s)				
3.4.5	Design initial round of partnership engagements				
3.5	Understand company marketing and opportunities for support				
3.5.1	Conduct initial interviews with companies to understand their needs				
3.5.2	Hold regular meetings (monthly or quarterly) to share and discuss plans for demand support				
3.6	Develop communications spotlight series on clean cooking consumers				
3.6.1	Identify families who have recently transitioned to clean cooking				
3.6.2	Interview families to understand their motivations for adopting a clean cookstove or fuel				
3.6.3	Feature stories on the websites, newsletters, and social media accounts of the Alliance and partners				
3.7	Raise profile of clean cooking within broader SBCC sector				
3.7.1	Participate in global conferences and meetings focused on social marketing and behavior change				

Monitoring and Evaluation					
4.4	Rapid household mobile survey for baseline data collection				
4.5	All baseline data collected and analyzed				
4.6	Targets set for project indicators				
4.7	Project indicators data collection				
4.8	Learning activity				

ANNEX 3: Clean Cooking Alliance Theory of Change

CCA's Theory of Change (ToC) depicts CCA's strategy and motivation, and the context in which it operates, in a clear diagram (see Figure 5 below). The ToC begins with the "Initial Conditions" statement in the top right. The statement describes the current state of clean cooking and the challenges that motivate CCA's work.

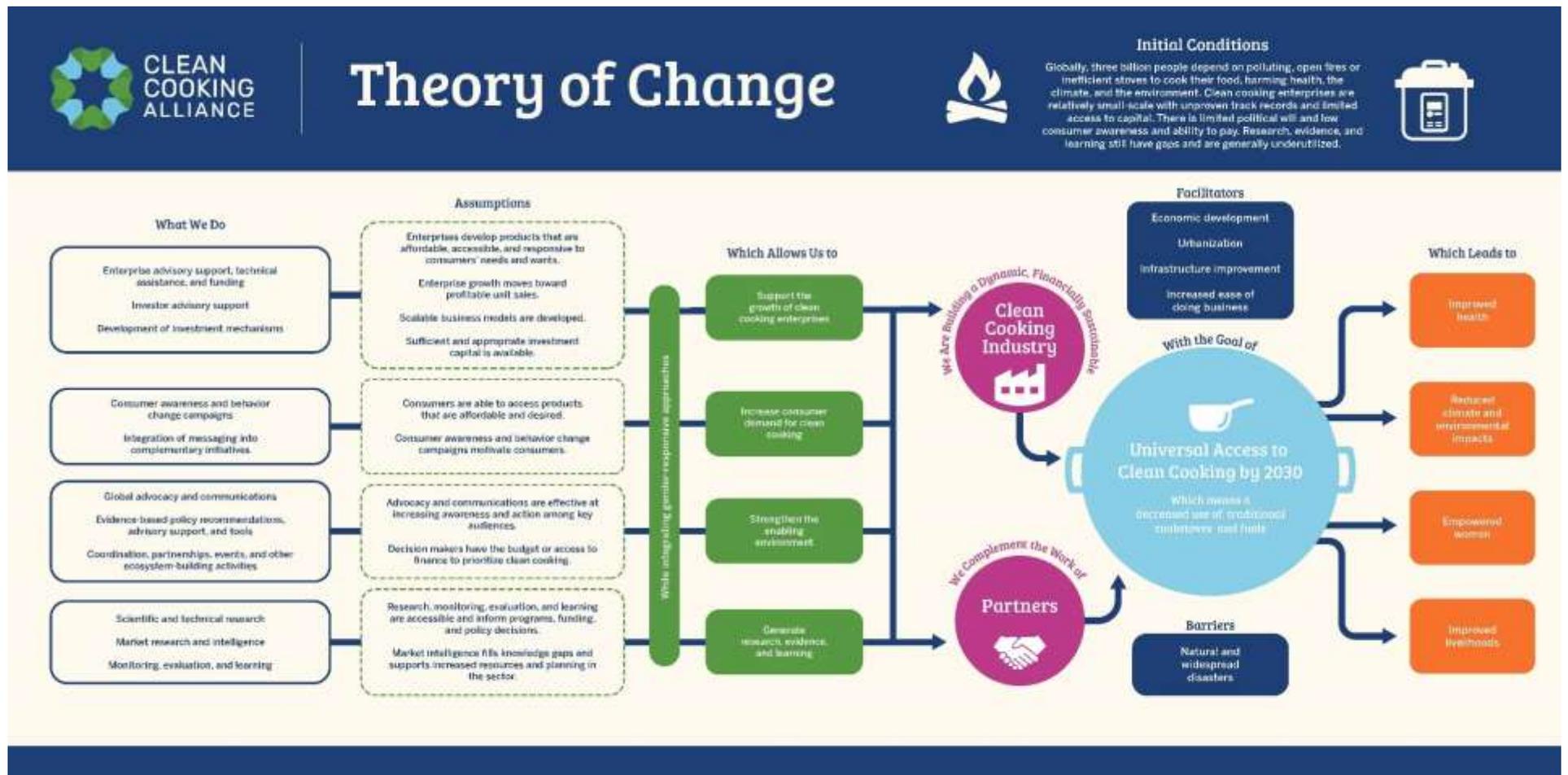
The ToC should be read from left to right, starting with the "What We Do" section that articulates CCA's main activities. The activities presented are not exhaustive, but rather offer a more generalized and representative view of CCA's approach. These activities results in four main pillars under "Which Allows Us to." Connecting the "What We Do" list of activities with the "Which Allows Us to" descriptions are a list of "Assumptions." These assumptions list the conditions that often lie outside of CCA's control and must be satisfied, to some degree, in order for CCA's activities to achieve the work under the four pillars. The vertical green bar before "Which Allows Us to" highlights the gender-responsive component that is embedded in each of the four pillars, per CCA's Gender Strategy.

In combination, the four pillars under "Which Allows Us to" constitute CCA's approach to addressing clean cooking at scale: building a dynamic, financially sustainable clean cooking industry, as shown in the upper purple circle. CCA approaches the goal of universal access to clean cooking by building an industry because it hypothesizes that the sector will reach the scale necessary to achieve universal access only with a fully developed clean cooking market.

CCA also works very closely with, and complements the work of, partners throughout the sector as highlighted in the lower purple circle. With unique approaches and distinct market segment priorities, partners in the sector also contribute significantly to achieving universal access. The ToC also includes "Facilitators" and "Barriers" on the right side of the diagram. These are large-scale global factors that describe the context in which CCA works.

CCA is working toward the ultimate goal of universal access to clean cooking by 2030, according to Sustainable Development Goal (SDG) 7. Through increased access to clean cooking and the associated decreased use of traditional cookstoves and fuels, four main co-benefits may be achieved. The orange squares on the far right show the ways in which clean cooking will transform lives: improving health, reducing the climate and environmental impacts of traditional cookstoves and fuels, empowering women, and improving livelihoods.

Figure 5: Clean Cooking Alliance theory of change



ANNEX 4: Previous and Revised Indicators

Results Framework Area	Previous 2019 Workplan Indicator	Revised Indicator	Comments
<p>Outcome: Increased access to renewable energy</p> <p>CCA Outcome: Increased access to clean cooking</p>	Number of people who have gained access to clean cooking	1) Number of people who have gained access to cleaner cooking solutions	Language change
<p>Intermediate Outcome: Multilateral and private sector support to developing countries for the development of renewable energy policies and investments</p>	Number of organizations providing in-kind and/or financial support to the clean cooking sector	2) Number of organizations providing in-kind and/or financial support to the clean cooking sector	No change
	US\$ mobilized multilateral investments	3) US\$ mobilized multilateral investments	No change
	US\$ mobilized private investments	4) US\$ mobilized private investments	No change
<p>Venture Catalyst: Improved pipeline of investment-ready companies</p>	Unit sales of cookstoves and fuels sold by supported companies	5) Number of cleaner cooking solutions sold by supported companies	Language change
	US\$ revenue generated by supported companies	6) US\$ revenue generated by supported companies	No change
	N/A	7) Average of supported company growth rates in cleaner cooking solution sales year over year	New indicator
	Number of employees in supported companies	N/A	Indicator moved and is now indicator #15
	N/A	8) Net promoter score* of product brand *(Percent promoters minus percent detractors)	New indicator
	N/A	9) Percent of companies receiving gender technical assistance who show improvement in the gender diagnostic tool	New indicator
	N/A	10) Number of participants in the women's professional development program	New indicator
<p>Venture Catalyst: Increased capacity within companies to raise capital for growth</p>	US\$ weighted average unit profit margin of top three selling products	N/A	Indicator changed and is now new indicator # 16
	Number of companies with Boards of Directors	11) Number of supported companies with Boards of	Language change

	that hold regular meetings	Directors that hold regular meetings	
	Number of companies with audited financial accounts	12) Number of supported companies with financial accounts audited	Language change
	N/A	13) Number of supported companies producing monthly management accounts	New indicator
Venture Catalyst: Increased capacity within companies to improve and grow operations	Self-assessment scores using an organizational capacity assessment tool	14) Self-assessment scores using an organizational capacity assessment tool	No change
	N/A	15) Number of employees of supported companies	Indicator moved from other Venture Catalyst area
	Average years of commercial experience held by members of company management team	N/A	Indicator removed, but the project will do internal tracking of cumulative years of commercial experience of company's management team
	N/A	16) Percent weighted average gross margin of top three selling products per supported company	New indicator
Venture Catalyst: Increased capacity within companies to deliver new or improved products or services	Number of products commercialized	17) Number of new products or services commercialized	Language change
	Average time between product releases	N/A	Indicator removed as it is not relevant
	N/A	18) \$USD spent (including staff time) on R&D over the past calendar year	New indicator
Market Catalyst: Improved enabling environment for clean cooking industry growth	Percent of companies that perceive a more beneficial policy environment	19) Percent of supported companies that perceive a stronger policy environment for the clean cooking industry	Language change
	Number of national-level government policy changes that benefit clean cooking industry growth	20) Number of national-level government policies and strategies that benefit clean cooking industry growth	Language change
	Number of governments including clean cooking in funding requests	N/A	Indicator removed as it is not useful and does not demonstrate demand
Market Catalyst:	Percent of targeted ecosystem actors who	21) Percent of ecosystem actors who perceive	Language change

Improved understanding by ecosystem actors of clean cooking markets and potential benefits	perceive resources help support the case for clean cooking	resource materials to be helpful in supporting the case for clean cooking	
Market Catalyst: Greater visibility of clean cooking for ecosystem actors	Percent of event attendees who report that the event provided them with new information that supports the growth of the clean cooking industry	22) Percent of event attendees who report that the event provided them with new information to motivate their action to support the growth of the clean cooking industry	Language change
Market Catalyst: Increased capacity of ecosystem actors to promote the growth of the clean cooking industry	Percent of targeted ecosystem actors with increased ability to promote the growth of the clean cooking industry	23) Percent of policy or investment workshop participants with increased ability to promote the growth of the clean cooking industry	Language change
Demand Catalyst: Increased consumer demand for clean cooking	Percent of target customers who intend to purchase a clean cookstove or fuel	24) Percent of target consumers with the intention to purchase a cleaner cooking solution	Language change
	Percent of supported company sales from customers exposed to behavior change communication activities	25) Percent of target consumers who recognize behavior change communication (BCC) messaging	Language change
Demand Catalyst: Increased consumer knowledge of the benefits of clean cooking	Percent of target customers who are aware of the benefits of clean cooking	26) Percent of target consumers who are aware of the targeted benefits of clean cooking	Language change
Demand Catalyst: Increased consumer knowledge of clean cooking options	Percent of target customers who are aware of available clean cooking options	27) Percent of target consumers who are aware of available clean cooking options	Language change
Demand Catalyst: Improved consumer attitudes about clean cooking	Percent of target customers who would recommend a clean cookstove or fuel to someone they know	28) Percent of target consumers who would recommend a cleaner cooking solution to someone they know	Language change

ANNEX 5: Performance Monitoring Framework (PMF)

Indicator	Baseline	Disaggregation	Year 2 Target	Data Source	Data Collection Method	Frequency
Outcome: Increased access to renewable energy; CCA Outcome: Increased access to clean cooking						
1) Number of people who have gained access to cleaner cooking solutions	Mobile baseline household survey, approx. Q3 2021	Gender, country	TBD	MTF, LSMS, and DHS surveys; targeted consumers; supported companies	MTF, LSMS, and DHS surveys; Rapid mobile household (HH) survey; Industry Snapshot survey; company documents	Annual
Intermediate Outcome: Multilateral and private sector support to developing countries for the development of renewable energy policies and investments						
2) Number of organizations providing in-kind and/or financial support to the clean cooking sector	To be reported in 2020 Annual Report	Supported companies and not; incorporated a gender-lens or not; equity, mezzanine, debt, and grants	TBD	Supported companies; CCA	Snapshot survey, CCA documents	Annual
3) US\$ mobilized multilateral investments	To be reported in 2020 Annual Report	Supported companies and not; incorporated a gender-lens or not; equity, mezzanine, debt, and grants	TBD	Supported companies	Snapshot survey; company documents	Annual
4) US\$ mobilized private investments	To be reported in 2020 Annual Report	Supported companies and not; incorporated a gender-lens or not; equity, mezzanine, debt, and grants	TBD	Supported companies	Snapshot survey; company documents	Annual
Venture Catalyst: Improved pipeline of investment-ready companies						
5) Number of cleaner cooking solutions sold by supported companies	To be reported in	Company, fuel vs. stove; by fuel type vs. service	TBD	Supported companies	Snapshot survey; company documents	Annual

	2020 Annual Report					
6) US\$ revenue generated by supported companies	To be reported in 2020 Annual Report	Revenue from sales vs grants	TBD	Supported companies	Snapshot survey; company documents	Annual
7) Average of supported company growth rates in cleaner cooking solution sales year over year	To be reported in 2020 Annual Report	N/A	TBD	Supported companies	Snapshot survey; company documents	Annual
8) Net promoter score* of product brand *(Percent promoters minor percent detractors)	Mobile baseline household survey, approx. Q3 2021					
9) Percent of companies receiving gender technical assistance who show improvement in the gender diagnostic tool	N/A	By company	TBD	Supported companies	Gender diagnostic tool	Baseline; endline
10) Number of participants in the women's professional development program	N/A	Participant type	TBD	Participants	Workshop roster; CCA documents	Annual
Venture Catalyst: Increased capacity within companies to raise capital for growth						
11) Number of supported companies with Boards of Directors that hold regular meetings	To be reported in 2020 Annual Report	N/A	TBD	Supported companies	Snapshot survey; company documents	Annual

12) Number of supported companies with financial accounts audited	To be reported in 2020 Annual Report	N/A	TBD	Supported companies	Snapshot survey; company documents	Annual
13) Number of supported companies producing monthly management accounts	To be reported in 2020 Annual Report	N/A	TBD	Supported companies	Snapshot survey; company documents	Annual
Venture Catalyst: Increased capacity within companies to improve and grow operations						
14) Self-assessment scores using an organizational capacity assessment tool	To be reported in 2020 Annual Report	N/A	TBD	Supported companies	Snapshot survey	Annual
15) Number of employees of supported companies	To be reported in 2020 Annual Report	Gender of management/non-management	N/A	Supported companies	Snapshot survey; company documents	Annual
16) Percent weighted average gross margin of top three selling products per supported company	To be reported in 2020 Annual Report	N/A	N/A	Supported companies	Snapshot survey; company documents	Annual
Venture Catalyst: Increased capacity within companies to deliver new or improved products or services						
17) Number of new products or services commercialized	To be reported in 2020 Annual Report	New or improved products; products or services; companies with TA for product support and not	N/A	Supported companies	Snapshot survey; company documents	Annual

18) \$USD spent (including staff time) on R&D over the past calendar year	To be reported in 2020 Annual Report	N/A	N/A	Supported companies	Snapshot survey; company documents	Annual
Market Catalyst: Improved enabling environment for clean cooking industry growth						
19) Percent of supported companies that perceive a stronger policy environment for the clean cooking industry	N/A	Company product	TBD	Supported companies	Survey	Baseline; endline
20) Number of national-level government policies and strategies that benefit clean cooking industry growth	To be reported in 2020 Annual Report	Include clean cooking as a gender issue to address gender within policy and not; standalone gender policies relating to clean cooking and not	N/A	Supported companies; government policies	Snapshot survey; company documents; policy review	Baseline; endline
Market Catalyst: Improved understanding by ecosystem actors of clean cooking markets and potential benefits						
21) Percent of ecosystem actors who perceive resource materials to be helpful in supporting the case for clean cooking	To be reported in 2020 Annual Report	Gender; gender-related resource materials vs all materials	TBD	Ecosystem actors	Survey	Annual
Market Catalyst: Greater visibility of clean cooking for ecosystem actors						
22) Percent of event attendees who report that the event provided them with new information to motivate their action to support the growth of the clean cooking industry	N/A	Gender-related new information vs all information	TBD	Attendees	Survey	Per event
Market Catalyst: Increased capacity of ecosystem actors to promote the growth of the clean cooking industry						

23) Percent of policy or investment workshop participants with increased ability to promote the growth of the clean cooking industry	N/A	Gender	TBD	Participants	Survey	Per workshop
Demand Catalyst: Increased consumer demand for clean cooking						
24) Percent of target consumers with the intention to purchase a cleaner cooking solution	Mobile baseline household survey, approx. Q3 2021	Exposure to direct or complimentary messaging	TBD	Target consumers	HH survey	Baseline; endline
25) Percent of target consumers who recognize behavior change communication (BCC) messaging	Mobile baseline household survey, approx. Q3 2021	Exposure to direct or complimentary messaging	TBD	Target consumers	HH survey	Baseline; endline
Demand Catalyst: Increased consumer knowledge of the benefits of clean cooking						
26) Percent of target consumers who are aware of the targeted benefits of clean cooking	Mobile baseline household survey, approx. Q3 2021	Exposure to direct or complimentary messaging	TBD	Target consumers	HH survey	Baseline; endline
Demand Catalyst: Increased consumer knowledge of clean cooking options						
27) Percent of target consumers who are aware of available clean cooking options	Mobile baseline household survey, approx. Q3 2021	Exposure to direct or complimentary messaging	TBD	Target consumers	HH survey	Baseline; endline
Demand Catalyst: Improved consumer attitudes about clean cooking						

28) Percent of target consumers who would recommend a cleaner cooking solution to someone they know	Mobile baseline household survey, approx. Q3 2021	Exposure to direct or complimentary messaging	TBD	Target consumers	HH survey	Baseline; endline
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