

Energy Efficient Lighting and Appliances (EELA) Project in East and Southern Africa

EELA for on-grid and off-grid productive use in EAC and SADC



Ground Rules

- Kindly <u>mute</u> your microphone during the presentations.
- Use the <u>"Raise Hand"</u> button in case you would like to ask a question or to add something in the conversation.
- Interpretation is available in French and Portuguese click the button and select.
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Virtual and interactive!





Raise Hand







Agenda

| No. | Webinar Item | Time (CAT/EAT) | Name | Organisation |
|-----|--|------------------------------|---|------------------------|
| 1 | Welcome remarks | 10:00-10:10 / 11:00-11:10 | Ms. Karin Reiss-Haimbala | UNIDO |
| 2 | Presentation on EELA Project market assessment and recommendations on PUE for SADC and EAC regions | 10:10-10:40 / 11:10-11:40 | Mr. James Wakaba, Director East Africa Ms. Monica Wambui, Senior Associate Clean Energy Access | CLASP |
| 3 | Presentation on global outlook on PUE appliances drawing on LEIA examples | 10:40-10:50 / 11:40-11:50 | Ms. Richa Goyal, Senior Insight Manager Ms. Sarah Hambly, Partnership and Communications Manager | Energy Saving Trust |
| 4 | Q&A | 10:50-11:10 / 11:50-12:10 | | |
| 5 | Presentation on EELA Project activities on PUE | 12:10-12:20 / 13:10-13:20 | Mr. Readlay Makaliki, Lead Technical Expert, EELA Project | SACREEE |
| 6 | Facilitated discussion in breakout rooms on "Country experiences on EELA for PUE" | 12:20-13:05 / 13:20-14:05 | All Participants | |
| 7 | Closing remarks | 13:05-13:15 / 14:05-14:15 | Mr. Kuda Ndhlukula, Executive Director | SACREEE |

Moderator: Denis Ariho, Lead Technical Expert, EELA Project, EACREEE



Welcoming remarks and objectives of the webinar



Ms. Karin Reiss Haimbala, UNIDO - EELA





EELA Project market assessment and recommendations on PUE for SADC and EAC regions Mr. James Wakaba, Director East Africa, CLASP Ms. Monica Wambui, Senior Associate, CLASP



Study Objective, Methodology and Tools



The Assignment

Objectives

- Characterize the market for energy efficient appliances and equipment for on-and off-grid productive use in the EAC and SADC regions
- Analyze the existing supply/value chains for on-and off-grid productive use
- Identify high impact interventions to support increased uptake of PU appliances and equipment

Activities

- Macro-level analysis of the regional market
- In-depth analysis of 6 selected countries;
- Identification and prioritization of most relevant PUE appliances
- Market sizing for priority appliances in focus countries



Consultative Country Selection

- Regional representation: 2 EAC, 4 SADC
- Geographical diversity coastal and landlocked countries
- Market nascence: development and electrification levels
- Status of EE and PUE policies
- Climatic conditions
- Energy situation, challenges in the sector
- Structure of the private sector
- Availability of data

Focus Countries

- EAC: Rwanda, Tanzania
- SADC: Malawi, Mozambique, Zambia, Zimbabwe







Appliance selection criteria



- Technological maturity
- Income generation potential
- Private sector stimulation
- Efficiency gains
- GHG emission reduction potential
- Inclusivity
- Scalability

| 2 | 1 | 0 |
|----------------------------------|-------------------------|------------------------------|
| Has All indicators/ very likely/ | Has at least two | No indicators/ unlikely/ too |
| significant potential | indicators/Likely/ Some | niche/ not potential; |
| | potential | |



Market Sizing Methodology





The Outputs



PUE Analyses in EAC and SADC

6 PUE Analyses on 6 Focus Countries PUE Market Sizing Report for Priority Appliances



Country Findings





Rwanda and Zimbabwe

| Rwanda | Zimbabwe | |
|--|--|--|
| Demographics | | |
| Geographically smaller compared to neighbors | Relatively large geographical size | |
| High population density: 525/sq.km | Low population density: 38/sq.km | |
| Key Economic Activities | | |
| Agriculture, mining, manufacturing, indsutry, services, tourism | | |
| On/Off Grid Status | | |
| 48.6% of the population accessing electricity via the main grid | Access to electricity stands at 40% i.e., 16% in rural and 78% in urban areas | |
| 52% of the population will be reached through Off grid solutions | Population 6% best served by mini-grids, 13% by SHS and 44% live with 15km of grid, hence, grid extension** | |



Rwanda and Zimbabwe

| Rwanda | Zimbabwe | |
|---|--|--|
| Enablers | | |
| Supportive existing overarching policy and regulatory frameworks | | |
| mechanisms to mainstream gender across all sectors | | |
| PU Highlights | | |
| Existence of cooperatives present an opportunity to implement PU appliances ad equipment at a larger scale | The PUE market is extremely nascent | |
| High population density=access through mini grid= integration of PU technologies | Opportunity to leverage the infrastructure in the nascent but developing standalone solar and lighting market to expand into and scale PUE appliance | |

Key PU Appliances



Market Sizing Sample Results: Zimbabwe and Rwanda



■ 2020 Zimbawe ■ 2033 Zimbabwe ■ 2020 Rwanda ■ 2033 Rwanda Market Size: Zimbabwe & Rwanda



Market Value in USD: Zimbabwe & Rwanda







■ 2020 Zim ■ 2033 Zim ■ 2020 Rwa ■ 2033 Rwa



Regional Findings



Relevant PUE and Value Chains

Motor driven Agro- processing e.g., Milling, Hulling Threshing (excluding drying):

Ideally at community level. Energy intensive energy used is proportional to the throughput achieved. Consider:

- sufficient catchment to utilize the service effectively (population density)
- efficient technologies to reduce operation cost
- If stand-alone solar PV is utilized, consider
 - Provision of ancillary services, to leverage idle energy.
 - Demand side management -to ensure max operation at peak sunhours
 - Value proposition highest in remote area



Relevant PUE and Value Chains

Water Pumping- community based or individually owned. Highly customizable depending on crop-specific water needs, climate, weather patterns and water source.

- Available water- thus water resource mapping is key.
- Poor water quality (high levels of sediments) is a major cause of pump performance decline.
- Pump add-ons such as water storage and irrigation systems are crucial.
- Quality, durability and thus warranties vary significantly across technologies and markets
- If Solar water pumps:
 - Pump efficiency is key to achieve maximum possible water yield
 - Portability may be desired and expected by end-users.



Relevant PUE and Value Chains

Cooling - Refrigeration, walk-in cold stores, milk chillers. variety of scales from individual. community to largescale warehousing solutions.

- Different technologies for different use cases- mapping in vital.
- Performance heavily affected by ambient temperature and relative humidity.
- Skilled and specialized labor required
- Choice of refrigerant is crucial and regulated
- If community-based solutions sufficient catchment areas needed
- Cannot be viewed in isolation as most value chains require a cold chain.
- If stand-alone solar PV is utilized, consider
 - Energy storage can be prohibitively expensive- Innovations like solar direct-drive (SDD) technology



Other Value Chains

| Other Industries | | | |
|-------------------------|--------------------------|---|--|
| Industry | Opportunity | Incumbent Technology | Possible PUE Replacement |
| Textiles & Garm | Tailoring | | Solar powered sewing machines |
| ents | Ironing | Use of Charcoal Iron box to iron fabric | Electric iron box |
| Artisanal produc | Metal working | Manual tools | Electric drills, Welding machines |
| tion | Wood working | Manual tools | Carpentry machines |
| | Cooking | Biomass | Popcorn machines, Electric pressure cookers |
| Services | Entertainment | N/A | TVs , Radios |
| Services | Cooling | N/A | Refrigerators & Freezers |
| | Barber shops and Saloons | Manual tools | Hair dryers and Hair clippers |
| E-commerce & e-services | Communications | N/A | Mobile Phones and computers, printers, scanners |





There are several types of private sector supply chain actors involved in the delivery pf PUE, The most common type, emerging are **Producers/ OEMs** coupled with **vertically-integrated companies** or **distributors**.



KEY: Colored icons represent the activities that supply chain actors are commonly involved Dotted lines signify the activities that supply chain actors sometimes involve.



Challenges and Recommended Interventions



Legislative and Regulatory Barriers

- Insufficient regulatory frameworks
- Insufficient quality standards
- Adoption of quality, performance, and testing standards provides uniform technical requirements for appliances and equipment entering a market.
- Adoption of clear, efficient, and supportive policy and regulatory framework
- Gender inclusive policies



Capacity and awareness barriers

- Low consumer awareness and limited technical capacity
- Lack of up-to-date information/data
- To strengthen the PUE supply chain and market linkages between relevant actors in the PUE market

- Develop productive use awareness programs in order to build a strong belief amongst a wide range of stakeholders.
- Develop technical/implementation capacity of users and companies
- Enhance evidence-based decisionmaking
- Introduce PUE technology and training programs in higher education institutions or avail free courses on the same through media such as radio or the internet.
- Supply chain logistics enhancement



Financial Barriers

- Poor access to finance/financial constraints for enterprises/companies;
- Affordability/lack of consumer financing

- Reduce affordability barriers for end-users
- Increased focus on the private sector



THANK YOU

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Annexes: Tanzania, Malawi, Mozambique and Zambia Country Profiles



PU Market Barriers and Interventions

- Low customer awareness
- Low consumer affordability
- Financing constraints for companies
- Variable quality and performance of PU
- Underdeveloped supply and value chains
- Limited Market intelligence and reliable data on industrial PU



Zambia

Demographics

- Geographically large
- Low population density 23/sq.km

Economic Activities

- Copper mining, manufacture, tourism
- Agriculture ; large(more developed) and small scale; crop, livestock and aquaculture

On & Off Grid Status

- 74.8% of the urban population is served by the grid compared to 4% in rural areas.
- The grid mainly serves the mining sector
- Only 4.7% of population is served by off grid solutions.



| Indicator | 2020 |
|---|---------|
| Total(million) ¹ | 18.38 |
| Agricultural Land (Sq km)(2019) | 238,360 |
| Population density (people per sq. km of land area) | 23.3 |
| Electrification Rate (access to electricity(%)(2019) ¹ | 43 |
| Rural Population, % of Total ¹ | 55 |



Zambia

Enablers

- Few existing overarching policy and regulatory frameworks
- Few national PU initiatives and budding private sector
- Very nascent gender mainstreaming action

Key PU Appliances

- Solar water pumping
- Milling
- Cold Storage
- Egg Incubators

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switch@ihpressing
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PU Highlights

- The uptake of off grid solar solution is still nascent. Present concerted action to accelerate adoption can be paired with PU solutions
- Existing Rural Growth Centers(RGCs) mapped out to be served by minigrids can be used as a conduit to accelerate PU adoption



Tanzania

Demographics

- Geographically large
- Average population density 64/sq.km

Economic Activities

 agriculture(crop , Livestock and aquaculture), manufacturing, mining

On & Off Grid Status

- 73.2% of the urban population is served by the grid compared to 19% in rural areas. Focus on the grid areas is industrial PU
- The off-grid areas in Tanzania are mostly electrified through Solar home systems and mini-grids.



| Indicator | 2020 |
|---|--------|
| Total(million) ¹ | 59.74 |
| Agricultural Land (Sq km)(2019) | 396500 |
| Population density (people per sq. km of land area) | 64 |
| Electrification Rate (access to electricity(%)(2019) ¹ | 37.7 |
| Rural Population, % of Total ¹ | 65 |



Tanzania

Enablers

- Existing overarching policy and regulatory frameworks
- Multiple national PU initiatives
- Robust private sector

Key PU Appliances

- Solar water pumps
- Grain Mills
- Cold Storage
- Egg incubators
- Oil extraction

PU Highlights

- Access through mini grid = integration of PU technologies
- Existence of mini-grids and active private sector in the PU supply chains present an opportunity to implement PU appliances and equipment at a larger scale while meeting the goal of inclusivity, increased economic and social wellbeing









Mozambique

Demographics

- Geographically large
- sparsely populated with low population density 39.74/sq.km

Economic Activities

 agriculture(Crop, livestock and aquaculture) manufacturing, mining

On & Off Grid Status

- 72.5% of the urban population is served by the grid compared to 4.93% in rural areas.
- The grid is Unreliable with frequent outages
- The off-grid sector is still undeveloped



| Indicator | 2020 |
|---|--------|
| Total(million) ¹ | 31.26 |
| Agricultural Land (Sq km)(2019) | 414138 |
| Population density (people per sq. km of land area) | 39.74 |
| Electrification Rate (access to electricity(%)(2019) ¹ | 29.6 |
| Rural Population, % of Total ¹ | 62.93 |



Mozambique

Enablers

- Existing overarching policy and regulatory frameworks
- Few national PU initiatives and mature private sector
- Very nascent gender mainstreaming action

Key PU Appliances

- Solar water pumping
- Milling
- Cold Storage
- Dryers

PU Highlights

- The uptake of off grid solar solution is still nascent.
- Working with FUNAE to accelerate their existing efforts on mini-grids and other off-grid solutions can be used as a pathway to accelerate PU adoption.









Malawi

Demographics

- Relatively medium-scale in geographical size
- High population density i.e., 202 per sq. km

Economic activities

• agriculture, services, industry

On & Off-Grid Status

- 23% of the population has access to some form of electricity, of which 10% is grid and 13% an off-grid solar device
- Electricity regulatory environment has been largely focused on grid power, but now extending to include mini-grids and Stand-Alone System
- Estimated potential to meet basic energy needs for 37% of the population through off and mini –grid renewable energy systems



| Indicator | 2020 |
|---|--------|
| Total(million) ¹ | 19.13 |
| Agricultural Land (Sq km)(2018) | 56500 |
| Population density (people per sq. km of land area) | 202.91 |
| Electrification Rate (access to electricity(%)(2019) ¹ | 11.2 |
| Rural Population, % of Total ¹ | 82.57 |



Malawi

Enablers

- Existing overarching policy and regulatory frameworks
- Favorable business environment to attract investment
- There is evidence of efforts to mainstream gender at least in the energy sector

Key PU Appliances

- Solar water pumping
- Milling
- Egg incubators
- Cold Storage

PU Highlights

- Though nascent PUE, the country has an existing standalone solar and lighting market which provides a strong infrastructural foundational basis on which productive use appliances and equipment can be expanded into and scaled in the market.
- The high population density is favorable especially for small scale PUE centered businesses applications for which adequate demand for services/good is essential for profitability








PU Supply Chains and Actors remove this, add to



KEY: Colored icons represent the activities that supply chain actors are commonly involved Dotted lines signify the activities that supply chain actors sometimes involve.







Global outlook on PUE appliances drawing on LEIA examples

Ms. Richa Goyal, Senior Insight Manager, Energy Saving Trust Ms. Sarah Hambly, Partnership and Communications Manager, Energy Saving Trust





About

- We will speak about two countries' experience promoting productive use and household appliances, using examples from the Low Energy Inclusive Appliances programme (LEIA)
- LEIA is a research and innovation programme that aims to double the efficiency and halve the cost of electrical appliances suited for off- and weak-grid households, small businesses, and industrial consumers.
- It is funded by UK aid and the IKEA Foundation and is delivered through Efficiency for Access.





Solar Water Pump Experience in India





Key characteristics of the Indian pump market

- In India, 54.6% of population is engaged in agriculture and allied activities. Agriculture contributes to 17.4% of the country's Gross Value Added.
- Number of installations: ~30 million pumps (21M electric, 9M diesel, 0.25M solar)
- There is a stress on government led subsidy-based schemes

Key differences with the African market

- Land under irrigation: 52% in India and 4% in SSA
- High number of installations in India: India has about ~30 million pumps
- India is a subsidy led-market: India a subsidy driven 'push' market, mostly a business to government market. 60-95% subsidy provided by government.
- Pricing: In India, SWP pricing depends on benchmark cost or tender cost, market-based price exploration is less.
- PAYGO financing is less prominent in in India
- Local manufacturing and supply is strong in India and weak in Africa
- Pump sizes: In India, 5 7.5HP are more prominent and common
- Appropriate density of farmers
- Higher grid availability for enabling grid integration or feeder models involving FiTs



The water stress challenge

- In some places, water table is receding by 0.3 meters per annum. Over 18% of total electricity consumption and over 5% of total diesel consumption in India is used for irrigation purposes (Central Electricity Authority, 2015).
- Fuel powered ground water pumping is responsible for 8-12% of GHG emissions.
- National water supply is predicted to fall 50% below demand by 2030.
- 54% of India faces high water stress. In particular, the extremely high stress area blanketing Northwest India. The region is India's breadbasket.
- Water stress experience is heterogenous in nature.



Image from www.indiawatertool.in, WRI



Weblink



Government subsidy scheme details

- PM Kusum scheme launched in March 2019 is the government's flagship scheme for distribution of SWPs.
- Gol plans to add 15,750 MW through installations of 2.75M SWPs by 2022 under KUSUM scheme. Some of the leading states in terms of installations are Chhattisgarh, Rajasthan, and Andhra Pradesh. This scheme has 3 components:
 - Component A: 10,000 MW of Grid connected pumps (solar or any other RE) [Solar feeder model]
 - Component B: 17.5 lakh standalone solar pumps (up to 7.5HP)
 - Component C: Solarizing existing 10L grid connected pumps (up to 7.5HP)
- Solar Energy Data Management (SEDM) Platform, rolled out in 15 states across India



Image from mnre.gov



Examples of innovative business models and technological solutions being deployed in India

Grid connected models

- Watchdog transformers to curb free-riding
- Universal Solar Pump Controller (USPC) based systems to use surplus energy for food processing and cold
- Design appropriate FIT scheme to incentivize optimum use
- Gujurat Suryashakti Kisan Yojana (SKY) model in Gujarat
- Maharasthra's Solar Agricultural Feeder Policy
- Service based models: Asset lies with entrepreneur, or rural NGO, or farmer cooperative e.g. pilot by IWMI in Bihar, work on Irrigation As A Service by Claro Energy

Stand alone solar models

- Asset sharing models e.g. owned by Farmers cooperative or JLG
- Micro pumps or portable pumps where intersection with Africa is greater: <1HP pumps or Claro Energy type models where an e-vehicle with batteries will transport pump for hire
- IoT devices to monitor gw use



Off-grid fan market in Pakistan





Background context and end-users

- Pakistan regularly experiences high temperatures and humidity
- To keep cool, people need fans that provide high airflow and, as such, consume a lot of electricity
- Many people with low incomes struggle to afford available fans





Available appliances

- Locally manufactured fans deliver high airflow, but consume a lot of energy and cannot be supported by small SHSs.
- Imported solar-powered fans often have low airflow and limited battery time, so cannot keep many of their users in Pakistan cool





Limited commercial finance and investment/focus on lowincome markets

- Previously, the IFC attempted to support local solar-powered fan manufacturers to improve the efficiency of their fans
- Small and medium enterprises have limited commercial finance & investment to improve their fans; big brand fan companies tend not to focus on DC fans.





Inconsistent and unsupportive policy

- The market in Pakistan was largely unregulated and quality standards for solarpowered fans were lacking.
- Without standards, fan manufacturers produced metal fans that deliver high airflow but compromise on quality.





How the LEIA programme supported the off-grid fan market

OUR WORK ON





Outcomes – more efficient fans and reduced costs

- Local fan manufacturers improved the efficiency of fans by incorporating PM motors
- The average cost per service delivery has fallen
- Fan manufacturers are able to provide longer warranties to consumers





Energy efficiency value in m3/min/W



Impacts: increased sales and benefits for beneficiaries

Increased sales of highly efficient fans

- Tamoor Fans reported that, since the launch of their new BLDC pedestal fan in early 2020, fan sales have surpassed 5,000 units within six seven months.
- The Sindh Solar Energy Project will finance 200,000 fan-based SHSs over three years in Pakistan.

Health and productivity benefits

- Increased energy access for households that purchase the fan with a PV system.
- Increased business productivity



LEIA resources

- Promoting High-Performing Off-Grid Appliances
- Promoting High-Performing Appliances: Advisory Services for Governments





THANK YOU

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EELA Project activities on PUE

Mr. Readlay Makaliki, Lead Technical Expert, EELA Project, SACREEE



Presentation Outline

- 1. EELA Approach to Change
- 2. EELA Interventions
 - Private Sector Support
 - > Policy Framework
 - Capacity Building











Energy Efficient Lighting and Appliances in East and Southern Africa - EELA

EELA has a transformational approach towards the development of vibrant markets where suppliers are delivering high-quality services and products for energy efficient lighting and appliances to increase awareness for households, businesses and public facilities across East and Southern Africa. EELA stimulates local manufacturing and private sector investments.

The EELA approach to change

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|------------|-----------|
| -:: | l |

Market incentives for the private sector to deliver efficient and high quality energy services



Minimum Energy Performance Standards (MEPS) for appliances which are harmonized in the region



Capacity building on policy and regulatory framework development, appliances testing and regulatory enforcement



Awareness raising on the benefits of adopting efficient technologies across all stakeholders

A coordinated regional effort through RECS and regional sustainable energy centres





Implemented by UNIDO with financial support from the government of Sweden





Policy Framework

- Developed Regional MEPS for Lighting
 - Adopted by SADCSTAN as regional harmonised text with reference SADC HT109:2021
 - ✓ Soon to be voted as adopted standard in EAC region
- Collaboration with UNEP's U4E on cosponsoring development of MEPS for cooling appliances (Refrigerators & Air Conditioners)
 - Draft MEPS for refrigerators and Air conditioners shared with Member States for comments
 - ✓ Expected to be finalised end 2022



SADC Regional TC Meeting



EAC Regional TC Meeting



Regional Compliance Framework

Goal

Effectively implement regional EE policy measures and protect EAC and SADC markets from non-compliant products.





Capacity Building of key Stakeholders

- Lack of ability by MS to carry out market surveillance
- Test equipment key to market surveillance and standards enforcement
- EELA Project to capacitate 2 Regional Labs
- Portable Lighting Test Equipment procured for 21 Member States
- For use in Market surveillance and conformity checks

MEASURE IN 30 SECONDS

- Lumen
- Peak candela value
- Color temperature, CCT
- Spectrum, CRI, TM30, CQS
- Beam angle
- · Detailed light distribution
- · Power and power factor
- Lumen per Watt





Measure any type of Light Source

Measures a variety of parameters No expert Knowledge required to use the equipment



Private Sector Support

Technical Assistance and Co-Financing Facility Summary

| | Window 1 | Window 2 | Window 3 |
|-----------------|----------------------|-------------------------|----------------------|
| Applicants | Energy users | Energy service | Manufacturers |
| | | providers | |
| | Technical assistance | Non- repayable grant to | Non- repayable grant |
| | to design an Energy | cover upfront costs for | to support |
| Support offered | Efficiency project | equipment | technology upgrade |
| | applying an energy | | |
| | service business | Max. 200,000 EUR | Max. 100,000 EUR |
| | model | | |
| | Demonstrated | Signed contract with a | Demonstrated need |
| Required own | commitment to | client. | for upgrade of |
| contribution | implement the | | manufacturing |
| | project | | |
| | | At least 25% | At least 25% |
| | | demonstrated co- | demonstrated co- |
| | | financing | financing |

Open Call for Expression of Interest launched April to December 2021



Capacity Building of key Stakeholders - EELA Online Training

- e-Learning platform developed
- Advantages include wider reach, more content and can be done at participants convenience
- Course open to all stakeholders with guided training for change agents





EELA Activities Supporting PUE Activities

- Through the EOI for the Private Sector Co-financing Facility we have identified projects demonstrating business models supporting PUE under the following initiatives
 - ✓ Street lighting to support off-grid markets
 - ✓ Commercial offshore fishing activities
 - ✓ Solar water pumping for agriculture
 - ✓ Cold storage for agricultural output
 - ✓ Efficient grain milling equipment
- Conducted a Webinar in May 2021 on Pathways to Repair of global off grid appliances – essentially focusing on life extension for PUE
- The Market Assessment on PUE will inform development of module 4 on the E-learning Platform and the recommendations will help develop future activities of the EELA project



Country Experiences on PUE Moderated by: Mr. Denis Ariho, EACREEE – EELA

Breakout session



Breakout Session

- Participants will be assigned in 1 of 4 breakout rooms
- **30 minutes discussion**
- French and Portuguese interpretation available in Group 1 only!

• **Questions:**

- 1. How does the EELA focus on productive use speak to the needs of your country?
- 2. What are your countries' key activities with respect to promoting the uptake of EELA for PUE?
- 3. What are the barriers and what support is required to implement EELA for productive use, on-grid, and off-grid in your countries (incl. capacity building needs)?
- 4. Which appliances do you think is there an opportunity to improve energy efficiency in?



Closing Remarks



Mr. Kuda Ndhlukula, UNIDO - EELA



THANK YOU

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