

25  
x25

# Electricity Access Market Activation: 25 Countries by 2025

A Collaboration By:

**POWER** FOR **ALL**

**Hivos**  
people unlimited

**SNV**

**PRACTICAL ACTION**  
Technology challenging poverty



1. MARKET ACTIVATION

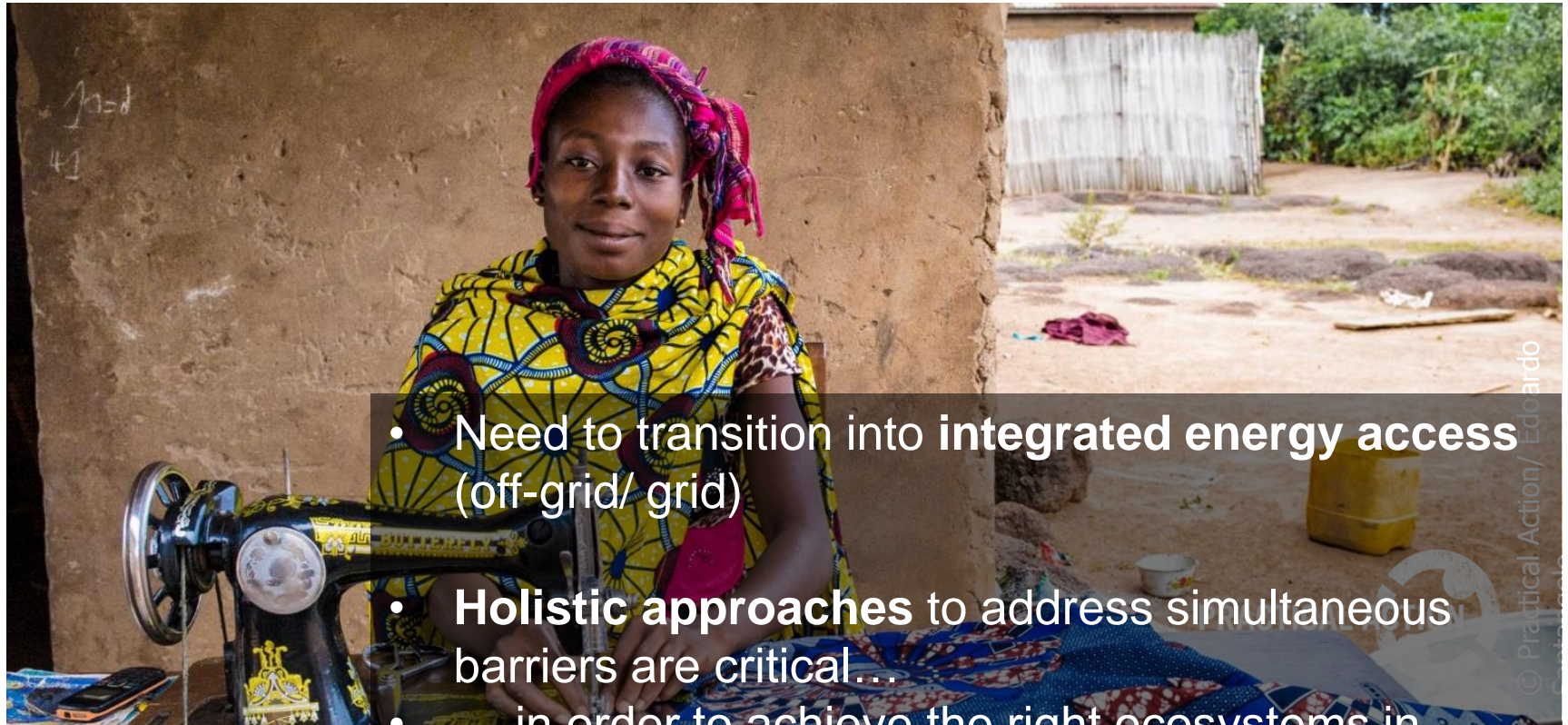
2. ABOUT

- THE COLLABORATIVE

3. IN ACTION

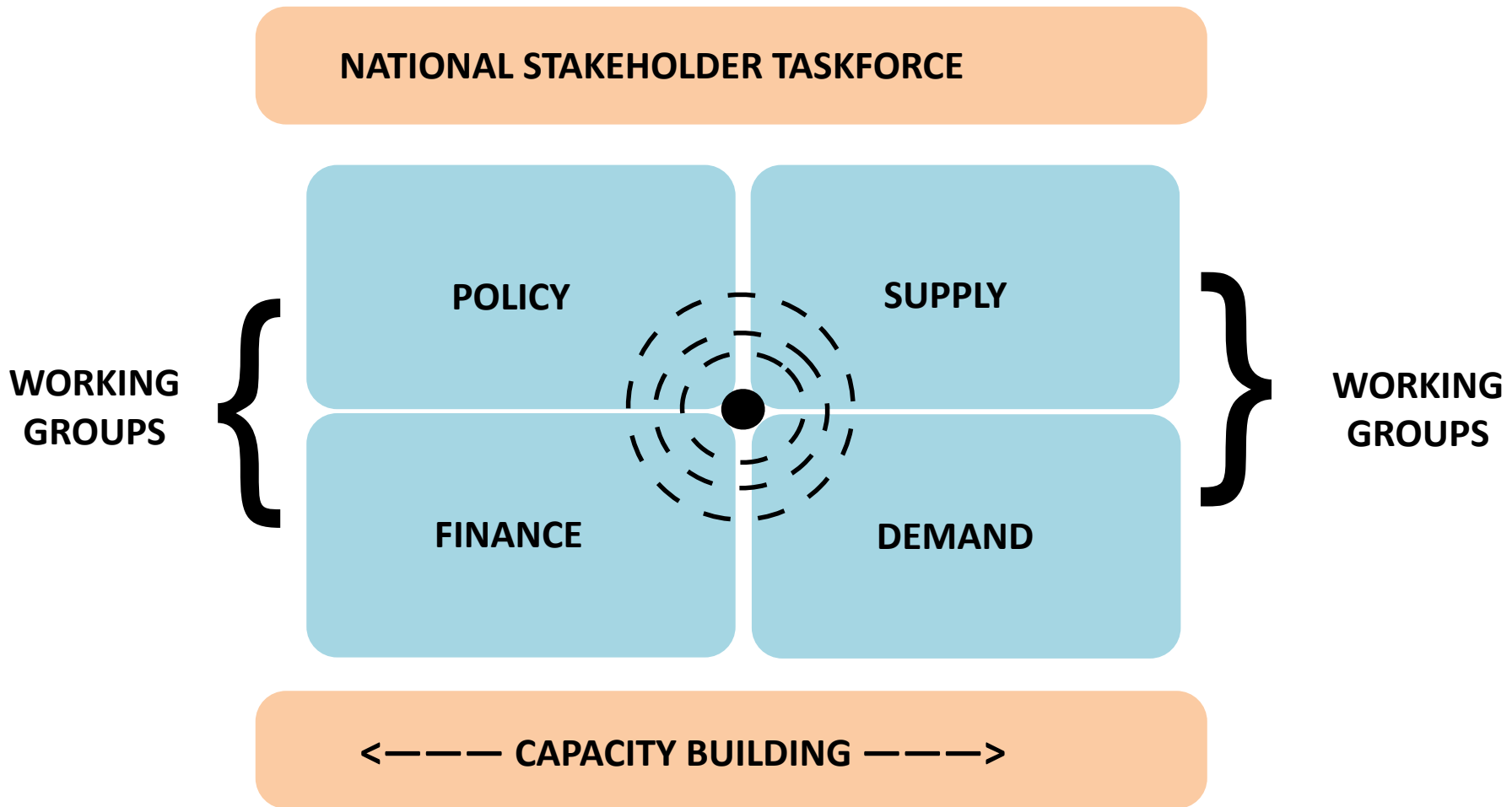
# 1 MARKET ACTIVATION

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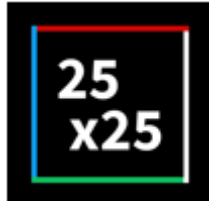


- Need to transition into **integrated energy access** (off-grid/ grid)
- **Holistic approaches** to address simultaneous barriers are critical...
- ... in order to achieve the right ecosystems in place
- **Multi-stakeholders** - private sector, governments and CSOs

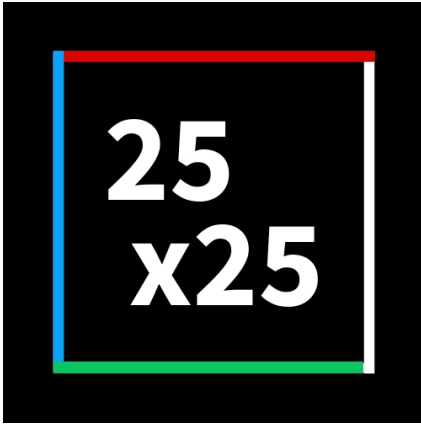
# 2 APPROACH: MARKET BUILDING



### 3 ABOUT: 4 LEADING INGOs



*The **25x25** Collaborative — Hivos, Power for All, Practical Action and SNV — aims to accelerate electricity access in **25** low energy access countries by **2025** through its market activation approach.*



# Success - Demand

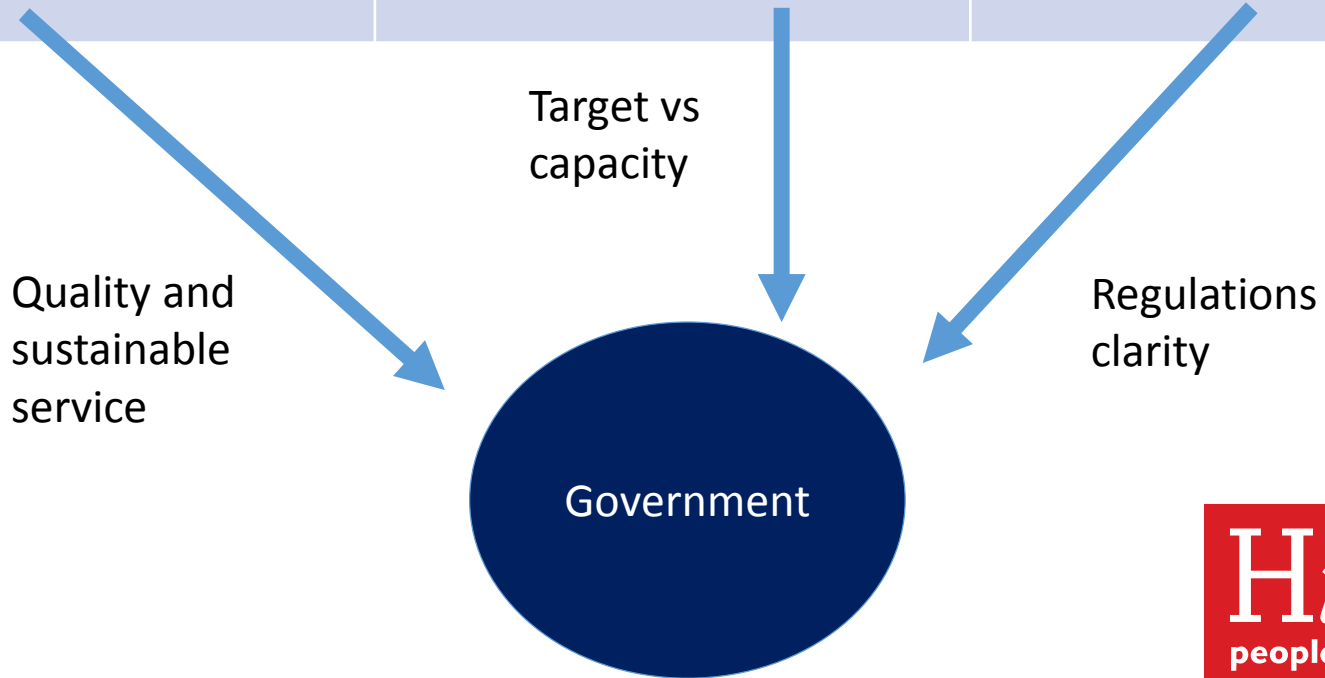
A Collaboration By:



# Understanding Demand

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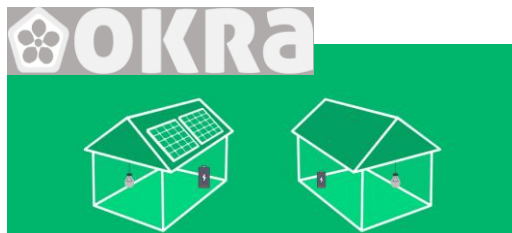
Communities	Utility-State Owned	Private Developers
<ul style="list-style-type: none"><li>• Reliable</li><li>• Sustainable</li><li>• Affordable</li></ul>	<ul style="list-style-type: none"><li>• Economic calculation</li><li>• Subsidy</li><li>• Private contribution</li></ul>	<ul style="list-style-type: none"><li>• Clear policy</li><li>• Viability gap funding</li><li>• Assurance on tariffs</li></ul>



# Demand: Businesses Mapping

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**A. Small group of early stage, social enterprises delivering decentralized RE solutions**



**B. Larger group of mature project developers, with some (CSR) initiatives in rural / remote areas**





# Creating the Market Place

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**Hivos**  
people unlimited

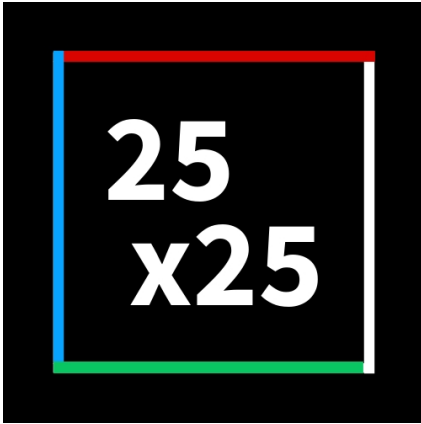
# Key Roles and Results

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Electrification ratio raised  
from 24% to 50.9%  
356k inhabitants electrified  
Total investment USD 48M

- Mobilising stakeholders
- Navigating through complex national & local RE regulations
- (local) business model support and engaging local community
- On-site feasibility assessments, engaging local community



# Success - Supply

A Collaboration By:





# 1. SUPPORT SUPPLY OF QUALITY SOLAR PRODUCTS

25 x25



Quality Standards for Accredited Solar Suppliers

4 Customer Service Standards for SLKs & SHSs

2 System Components Standards for SHSs

**សូឡាឡ**  
GOOD SOLAR INITIATIVE

**Quality Charter**  
Technical & Service Quality Standards for Accredited Solar Suppliers

Feb 2015 (v1.0)  
Final

Accreditation Certificates for various solar suppliers:

- វិញ្ញាបនបត្រនៃធុនស្តារ (Accreditation Certificate) for New Renewable Green Solutions Co., Ltd.
- វិញ្ញាបនបត្រនៃធុនស្តារ (Accreditation Certificate) for KAMWORKS
- វិញ្ញាបនបត្រនៃធុនស្តារ (Accreditation Certificate) for Empower Business Resources Co., Ltd. (Cambodia)
- វិញ្ញាបនបត្រនៃធុនស្តារ (Accreditation Certificate) for Lighting Engineering & Solutions Co., Ltd.
- វិញ្ញាបនបត្រនៃធុនស្តារ (Accreditation Certificate) for Entrepreneurs du Monde Co., Ltd. / Plein Soleil

Product images and specifications:

- D20
- SHS60
- LESSHS100X2

# 2.SUPPORT DEMAND MATURATION

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# 3. BUSINESS DEVELOPMENT FOR LAST-MILE DISTRIBUTION

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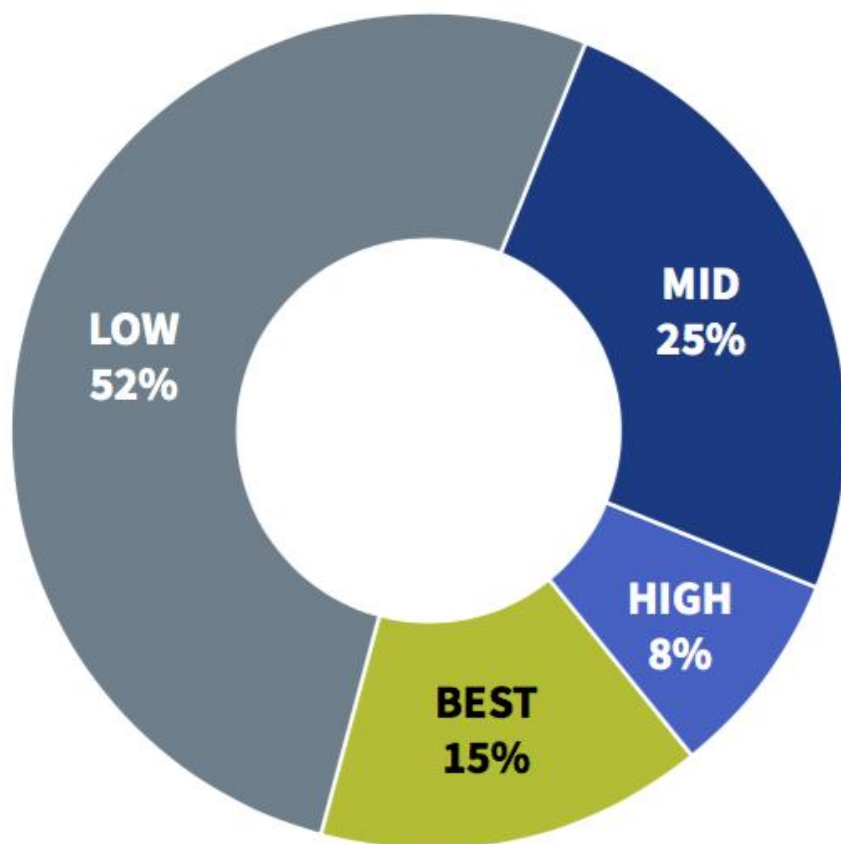
# 4. FINANCING FOR SOLAR DISTRIBUTORS & CUSTOMERS

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# APPROACH: TARGET

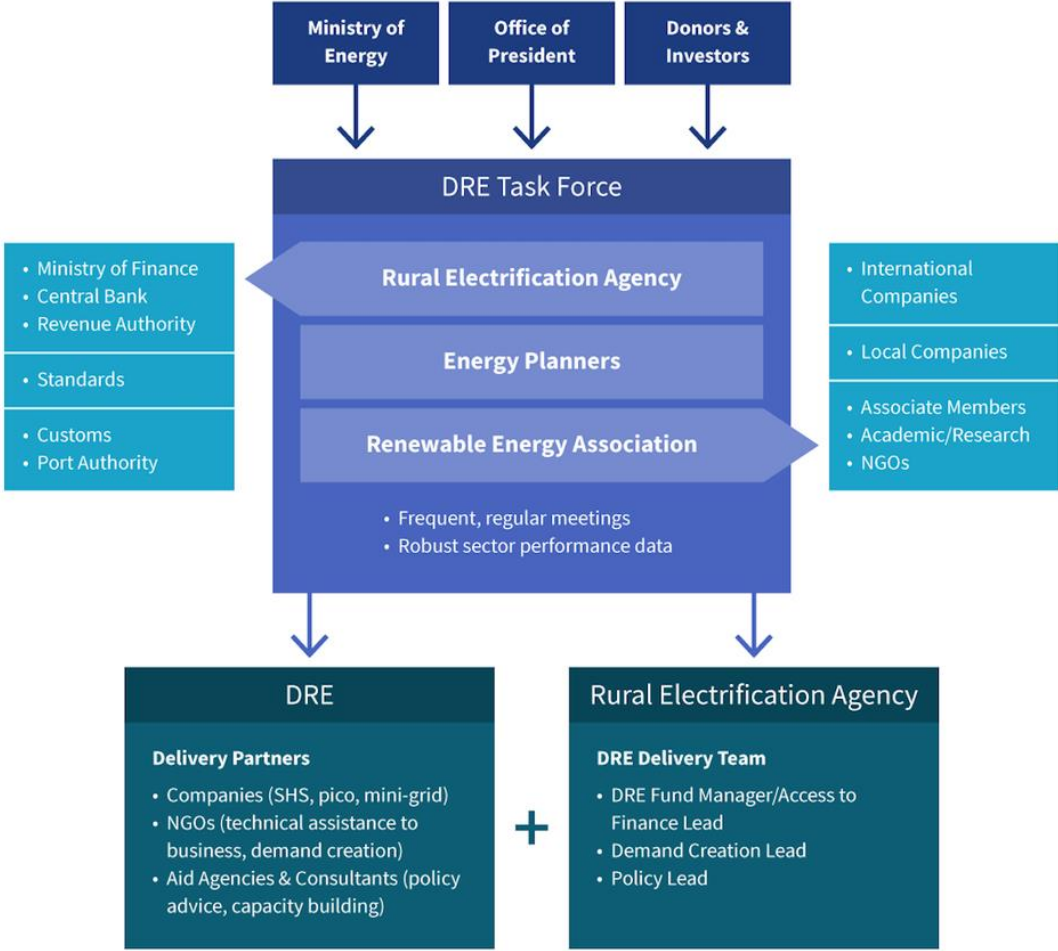


- **LOW**  
No targets *or* only national access targets
- **MID**  
National access *and/or* rural electrification targets  
No DRE target
- **HIGH**  
Rural and DRE targets *or*  
National and DRE targets
- **BEST**  
National energy access targets *and*  
Rural electrification and DRE targets



# APPROACH: TASK FORCE

## DECENTRALIZED RENEWABLE ENERGY (DRE) TASK FORCE



# APPROACH: TRANSFORM

General market development phases						
	Pre-Commercial Phase 0	Pioneering Phase I	Expansion Phase II	Maturity Phase III	Saturation Phase IV	Degeneration Phase V
Description of the market phase	In the context of developing countries, the time when a certain (existing) product/service has not yet reached a certain market or only a few units of this product are traded within the country on demand.	The new product is introduced into the market it is relatively unknown and has not yet earned the trust of consumers. As only small amounts of the product are bought by "early adopters", the focus lies on awareness raising and consumer gaining activities (high marketing costs, usually no-or low profits).	As the product gains popularity, new participants (competitors) enter the market. Turnover increases at a very high rate and the product starts generating high profits.	This is usually the longest and the most profitable phase. Demand is not growing at such a high rate anymore, and product prices drop. Due to the increasing competition for market share, profits decrease at the end of this phase. The number of suppliers decrease and the remaining ones increase their market shares.	The competition for market shares becomes even harder.	Turnover and profits decrease drastically; the product/service is replaced by a new product.
Adopter category	Total potential customers (100%) are divided into different categories during the different stages of market development.					
	Innovator 2-5%	Early Adopters 10-15%	Early Majority 35%	Late Majority 35%	Laggards 5-10%	Late laggards 0-10%



# SUCCESS: TASKFORCE



- Secured presidential pledge for **100% Power for All by 2025**
- Established & led multi-stakeholder **Energy Revolution Taskforce**
- **Drove Africa's first QA-linked VAT/tariff; changed laws in 90 days**
- **9900% rise in home solar market** with 10+ new market entrants
- Finalist for **2018 Ashden Awards** "Energy Access Pioneer"