

Measuring RES4Africa's achievements

pwc

RES4AFRICA FOUNDATION

TABLE OF CONTENTS

Executive Summary

1.0 Introduction

2.0 Measuring the impacts of ideas: the challenges and how we approached it

2.1 Influencing the policy conversation

2.2 Building networks and engaging stakeholders

2.3 Capacity building and knowledge transfer

2.4 Guiding public discussion and building social consensus

3.0 Conclusions

EXECUTIVE SUMMARY

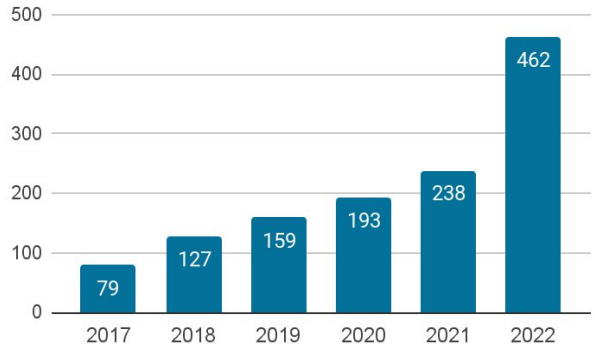
RES4Africa's mission is to work on accelerating Africa's just energy transition and creating favourable conditions for scaling up investments in clean energy technologies. On the 10 year anniversary of its launch, the Foundation considered it important to take a step back and look to what it has been able to accomplish in the last years to progress towards its mission.

To look into accomplishments, PwC applied an analytical lens in the form of an impact assessment concerning the last 6 years of RES4Africa's activities (2017-2022). The methodological approach consisted of identifying 4 impact areas on which RES4Africa's work is focused, and then designing 3 KPIs to quantify and measure the impact made in each impact area. The most significant messages that emerged from the analysis are presented below.

Influencing the policy conversation: in what is probably RES4Africa' s most important impact area, we observed a sharp growth both in the production of analytical content as well in the echo and that such content has generated in the broad public space

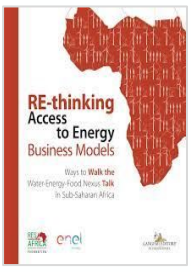
The impact of RES4Africa's work in spurring policy change and influencing the policy conversation is arguably the most relevant impact area to examine, as policy reform stands at the core of the Foundation's mission statement. The goal of RES4Africa's analytical and advocacy activities is oriented to influencing the policy conversation by generating evidence-based technical knowledge and providing a platform for constructive exchanges between industry stakeholders and African policymakers.

Mentions of RES4Africa's activities over 2017-2022

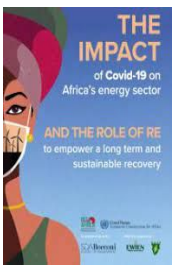


Source: PwC on the basis of web analytics. Figures include mentions by conventional media.

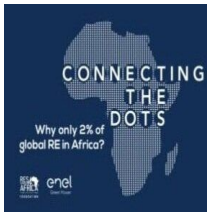
Top 3 most mentioned studies



2020



2020



2021

Source: PwC on the basis of web analytics.

To deliver on that goal, over the past 6 years RES4Africa published 78 reports and studies. The historical trend saw not only an increase in the annual number of reports, but also a growing diversity of topics: where in the early years reports were focused on the Med region and were largely Country Reports, in recent years the focus has expanded to the broad pan-African and sub-Saharan regions with an increasing presence of reports containing policy and technical recommendations.

An important metric of impact is the number of mentions of RES4Africa's work or, in other words, the amount of echo generated - as it gives an idea of how much the Foundation resonated with policy makers and the general public. An extensive web analytics exercise done by PwC identified a total of 1.258 mentions in the last 6 years, with a peak of 462 in 2022. RES4Africa's reports, studies, trainings and conferences have been mentioned by around 650 unique mentioners, composed of:

- Governments, Agencies and International Organizations (IOs)
- Industry Stakeholders
- Foundations and NGOs
- Academic Institutions
- Conventional media

Excluding conventional media, which are covered as a separate category in section 2.4, 33% of mentions come from governments, agencies and IOs, showing that RES4Africa's work has resonated the most with decision makers and policy makers, who are the Foundation's main target audience.

79 Events organized by the Foundation

26 B2G events

16 Countries covered by the events in total

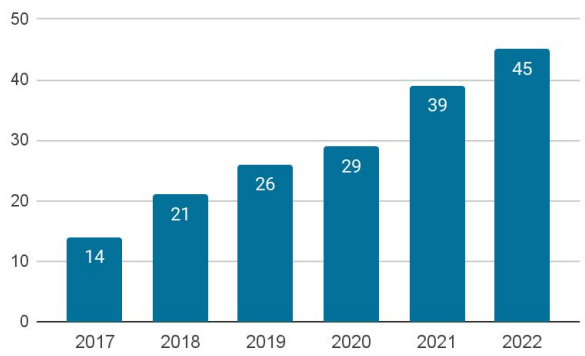
14k Participants in RES4Africa's events

One of RES4Africa's goals is to act as an honest broker and provide a space for dialogue between policymakers and industry, in order to identify joint strategies and to facilitate public-private dialogue to address the needs of the clean energy transition in Africa.

To deliver on that goal, the past 6 years have seen a sharp increase in the number of events and their participants. There has also been a growth in the number of countries covered by the events, which reached a total of 16 in 2022 comprising both the Med region and Sub-Saharan Africa. The growth in the number of events and attendance demonstrates RES4Africa's growing ability to reach out and engage with stakeholders and to speak to a variety of countries in order to embrace and spread its messages. The bigger the audience, the better to spread our voice

Building networks and engaging stakeholders: RES4Africa has successfully built a large and diverse network of stakeholders, through which it has been able to improve its ability to provide technical expertise, policy recommendations and stimulate investments into African renewable energy markets.

Cumulative number of MoUs and Letters of Intent over 2017-2022



Source: RES4Africa Foundation

Since 2017, RES4Africa significantly expanded its membership and partnership base, growing from a small group of mission-driven industry majors to an internationally recognised body that acts as a bridge between African policy makers, the private sector and European institutions.

While the number of members has remained essentially constant over the past six years, the network linked to RES4Africa by Memorandums of Understanding and Letters of Intent has significantly grown, in particular in the two latest years. The breadth of the network served to enrich the Foundation's local knowledge, and to amplify the impact and weight that the Foundation has in its dialogue with local policy-makers.

The geographic composition of RES4Africa network base expanded, too. As of 2022, the Foundation can count on a network of members and partners coming from 17 countries in Europe and Africa.

Geographic evolution of RES4Africa's network in Africa and Europe over 2017-2022



Source: PwC based on RES4Africa Foundation data

Capacity Building and Knowledge Transfer: RES4Africa trained thousands of renewable energy professionals ready to promote green policies and be part of Africa's just energy transition

Trainings and executive seminars are key pillars of RES4Africa's strategy to pursue its mission. RES4Africa runs a series of initiatives and training programmes that reflect the Foundation's commitment to work with Africa and to develop key skills for the energy transition.

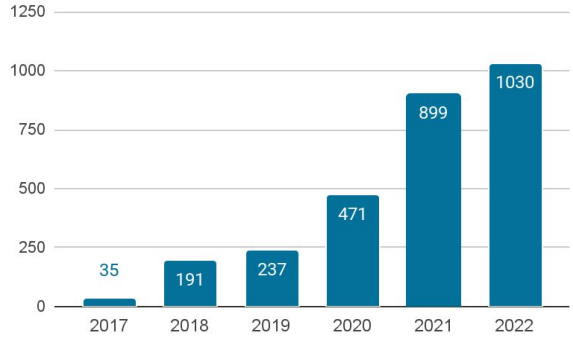
The main training programmes are the Advanced Training Course, established in 2014 to provide comprehensive knowledge to managers working in the RE sector in Africa, both in public and private sector, and the Micro-Grid Academy, a programme which aims to develop a skilled workforce for the implementation of decentralised renewable energy solutions. RES4Africa also offers Executive Seminars aimed at high-level audiences, such as representatives of governments or public companies involved in the energy sector. Finally, in 2022 RES4Africa launched the Re-skilling Lab, a long-term capacity building program in South Africa to accelerate the shift of the coal communities towards a sustainable economy by enabling local educational entities to equip young people on-the-ground with renewable energy skills. Between 2017 and 2022, almost 3000 people participated in RES4Africa's trainings. The pool of participants has become increasingly diverse: welcoming people from 65 countries; younger; and involving a growing female participation.

The impact of the trainings has been twofold. First, on a systemic level, the buildout of green skills has, among other factors, created the condition to facilitate policy change, by building a network of professionals in key positions and companies who act as agents of change.

Second, on a more individual level, they had a positive effect on job and career opportunities for many participants. Indeed, according to a recent survey of 111 MGA participants in 2021:

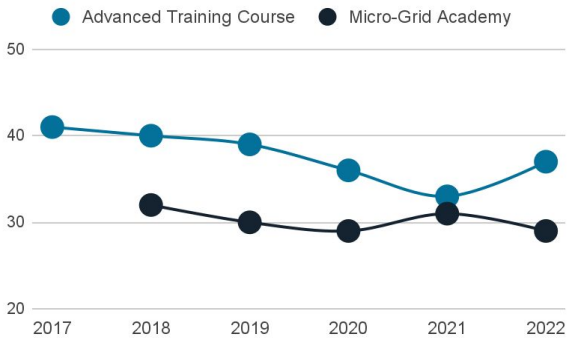
- 98% of respondents got work skills and career improvement
- 41% of respondents got new job opportunities

Number of participants in RES4Africa's trainings over 2017-2022



Source: RES4Africa Foundation

Median age of participants in RES4Africa's trainings over 2017-2022



Source: RES4Africa Foundation

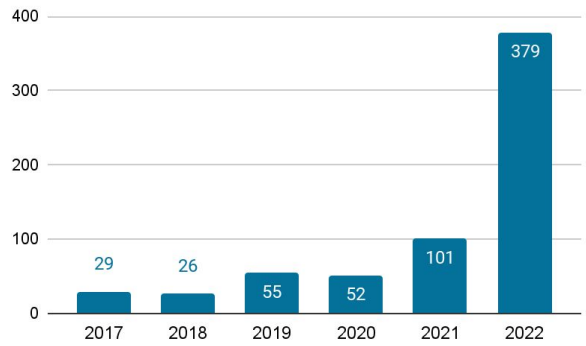


Communication and Building social consensus: Between 2017 and 2022, RES4Africa expanded its communication tools and strengthened its position on social media to reach a broad and more engaged audience

RES4Africa's effort to disseminate technical knowledge and policy recommendations to a wide audience was galvanized by good coverage by conventional media and increasingly more dynamic use of social media channels.

Between 2017 and 2022, RES4Africa's work was mentioned over 640 times by approximately 360 unique media outlets. It is worth noting that, although most mentions come from European media, media coverage by African outlets has been growing. This testifies how RES4Africa has established itself as an authoritative, credible and unbiased source of information and knowledge within the African public sphere.

RES4Africa's media mentions over 2017-2022



Source: PwC based on web analytics

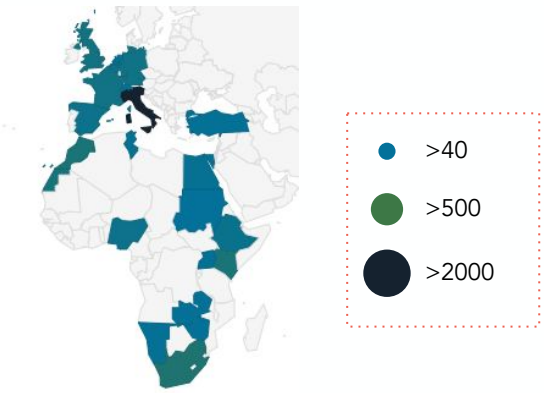
Who is talking about RES4Africa? Five media outlets

Source: PwC based on web analytics

These years were also marked by a new communication strategy. The Foundation expanded its communication tools to engage a wider and younger audience, shaping a new form of communication designed not only to provide updates on the Foundation's activities, but also to disseminate and exchange ideas, knowledge and views. In 2022, a sharp boost in media mentions reflects both the high profile of events (e.g. 10 year anniversary and COP27 side event) as well as an ever closer cooperation with key media outlets.

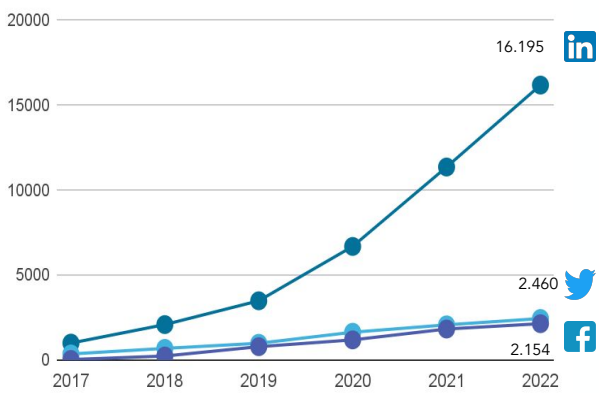
Between 2017 and 2022, the number of followers on the three main social media, Linkedin, Facebook and Twitter, has grown sharply, a sign that RES4Africa has succeeded in engaging a broader audience over time. Followers stem from 23 countries from 4 continents, but mostly from Africa and Europe. Although the largest number of followers comes from Italy, a high level of engagement can also be seen in Sub-Saharan Africa countries, in line with an expansion of the Foundation's scope of work and geographical focus, started in 2017.

RES4Africa's social media followers by country (2021-2022)



Source: RES4Africa Foundation

RES4Africa's social media followers over 2017-2022



Source: RES4Africa Foundation



1 INTRODUCTION

RES4Africa celebrated its 10th anniversary in 2022. Since its birth in 2012, the Foundation has worked to create enabling conditions for increased investment in clean energy technologies to accelerate Africa's just energy transition and transformation.

In pursuit of this mission, RES4Africa established itself as a neutral platform and bridge builder between public and private actors along the renewables value chain, bringing together a wide network of members including utilities, industries, agencies, technical service providers, research institutes and universities, and providing an open space for the dissemination of technical knowledge and ideas. The Foundation also increasingly works as a think thank to develop knowledge products and strategic initiatives to help creating the right conditions for policy change, market development and mobilizing private investments.

On the 10-year anniversary, the Foundation asked itself two question:

- What has been the impact of its work?
- How can one quantify and report on the impact of a challenge as significant as Africa's energy transition?

To answer these question, PwC prepared an impact assessment looking into the activities over the past six years (2017-2022). In measuring the impact of qualitative work, it is even more important to focus not only on the activities that have been carried out, but also on how these activities lead to meaningful change.

RES4Africa's signature upside down approach



To challenge established views on cooperation between Europe and Africa, RES4Africa proposed an "upside-down approach" which puts Africa's needs on top of the agenda.

Picture above: An upside-down map of the Mediterranean region known as the Tabula Rogeriana, created by the Arab geographer and scientist Muhammad al Idrisi in 1154 for the Norman King Roger II of Sicily.

Source: RES4Africa Foundation

Sustainable Development Goals which are most relevant to RES4Africa's work



The following pages apply an analytical lens to RES4Africa's work. In order to examine the Foundation's impact both qualitatively and quantitatively, this report measured the impact against a set of KPIs derived from the Foundation's strategy, streams of activity and key areas of focus and expertise.

An impact assessment can be a powerful tool for communicating progress and achievements. It can be a tool for internal accountability and trust, but also for affirming the Foundation's role in the wider space in which it operates. The awareness of what has worked in the past and what more can be done can provide important guidance on where to go next.



2

MEASURING THE IMPACT OF IDEAS: THE CHALLENGES AND HOW WE APPROACHED IT

To reach its goal of accelerating Africa's just energy transition and transformation, the RES4Africa Foundation engages in a range of analytical activities, generating technical and policy knowledge, organizing events, training young talents, disseminating views, and setting up moments of constructive exchange between the public and the private sector. In other words, the Foundation carries out a fundamentally qualitative work grounded in the power of ideas.

RES4Africa's Mission Statement

Working towards creating favourable conditions for scaling up investments *in clean energy technologies to accelerate Africa's just energy transition and transformation.*

Measuring the impact of such a qualitative work is a challenge. To do so, it is important to focus not only on the activities that have been carried out, but also on how these activities have lead to meaningful change.

To achieve this, PwC's methodological approach to assessing RES4Africa's impact reflected the following three steps:

1. Identify areas of impact
2. For each impact area, define KPIs to measure and quantify the impact
3. Assess impact through collecting and analysing data.

The first step was to identify areas of impact. To do so, we started from the Foundation's mission, strategic positioning and activities. Following this model, four areas were identified for which we sought to assess the Foundation's impact:

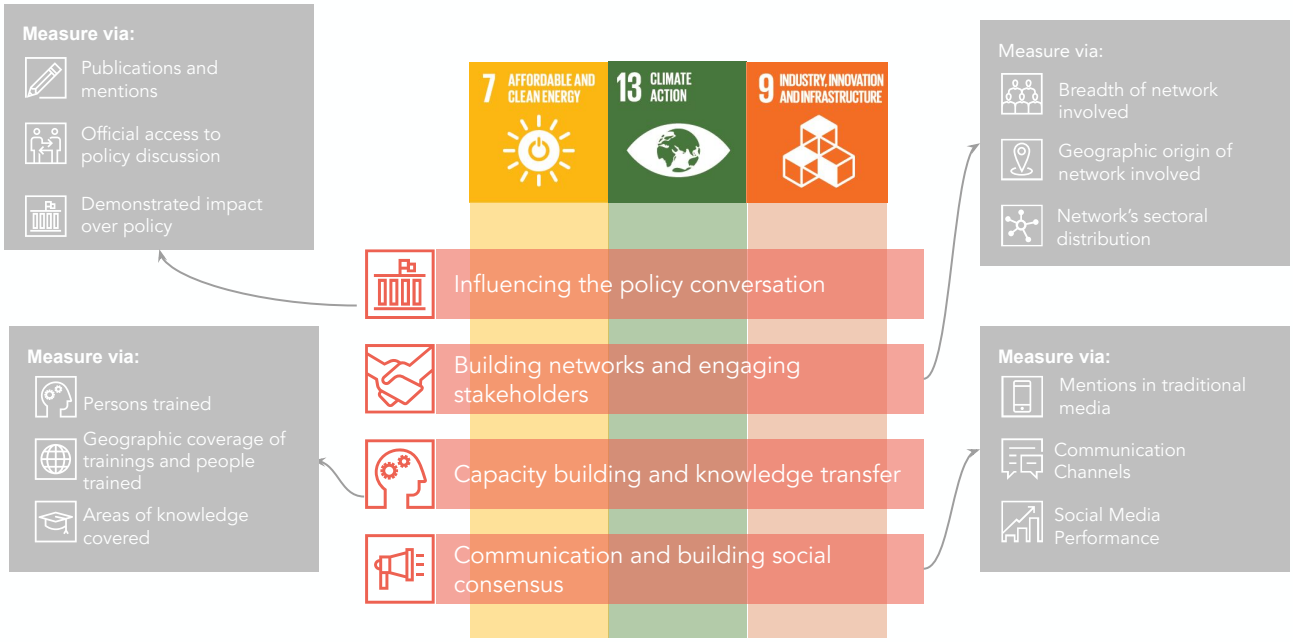
- Influencing the policy conversation
- Building networks and engaging stakeholders
- Capacity building and knowledge transfer
- Communication and building social consensus

For each of impact area, 3 KPIs were identified through which RES4Africa's performance could be measured. A list of the KPIs used is provided on the next page, which summarises the logic model used by PwC.

Finally, through close collaboration with RES4Africa, we collected and analysed the available data.

By examining each of RES4Africa's areas of intervention separately, we provide an in-depth look at the evolution of the Foundation's work by highlighting some important success stories and other noteworthy elements that demonstrate the growing and tangible impact the Foundation has had over the past 6 years in contributing to the development of renewable energy and energy transition on the African continent.

PwC logical framework and methodology to assess the impact of RES4Africa Foundation over 2017-2022



Source: PwC





2.1

INFLUENCING THE POLICY CONVERSATION

This section reviews the impact of RES4Africa's work in **spurring policy change and influencing the policy conversation**. This impact area is arguably the most significant aspect of RES4Africa's work, as it stands at the core of the Foundation's mission statement:

> *We work towards creating favourable conditions for scaling up investments in clean energy technologies to accelerate Africa's just energy transition and transformation.*

Creating favorable conditions for investments in Africa fundamentally entails:

- putting in place a high degree of **political commitment** and targets for renewable energy deployment;
- a conducive policy and regulatory framework enabling private investments scale-up;
- a well-defined, comprehensive de-risking framework to secure financing at minimum costs.

RES4Africa's analytical and advocacy activities are geared to influence the policy conversation in all three of the areas above, by generating evidence-based technical knowledge and providing a platform for constructive exchanges between industrial stakeholders and African policymakers. The impact that the Foundation has had in this area is quantified and measured via 3 KPIs:

- Publications and mentions
- Official access to policy discussions
- Demonstrated influence over policy



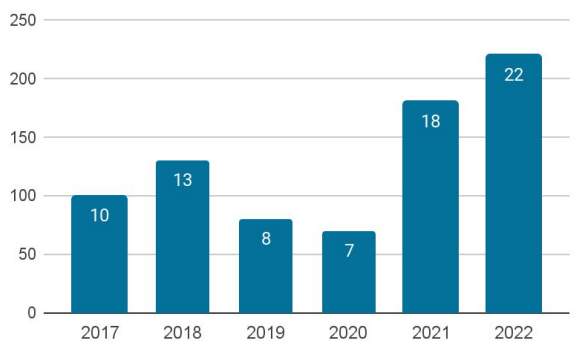
KPI 1: Publication and mentions

This KPI looks into the number of publications released by RES4Africa over the past six years, their subject matter area, and very importantly, the amount of times the Foundation's work has been quoted or mentioned by third parties. The production of knowledge products addressing key topics of Africa's energy transition is a strategic pillar for RES4Africa. With those products, the Foundation builds up its positioning, disseminates its messages and supports decision-making processes. Mentions, for their part, are a simple yet powerful **indicator of how far and wide the message has been disseminated**. In a world where information is ubiquitous, knowing that the message has been heard represents the ultimate testament of influence and impact.

Over the past 6 years, RES4Africa released 78 publications on a wide range of topics. The number of publications has **grown steadily over the years**, peaking in 2022 when on average, each month saw a release of 2 publications. The increase in publications testifies to the Foundation's ambition to establish itself increasingly as a think-tank and a generator of new ideas on key topics for Africa's clean energy future.

The breadth of topics covered has expanded too: in the Foundation's early years publications were focused on the Middle East and North Africa, while following the transition to RES4Med&Africa in 2017, the variety of studies grew to include Sub Saharan Africa and pan-African publications.

Number of RES4Africa publications over 2017-2022



Source: RES4Africa Foundation

78 Publications, of which...

35 Sub-Saharan Africa studies

22 Pan-African studies

21 MENA region studies

How do RES4Africa's publications impact the policy debate?

Studies and analytical content enable RES4Africa to impact and influence the policy debate by:

- Disseminating **in-depth knowledge** among stakeholders and the general public
- Providing expert, technical and **non-biased** policy recommendations
- Generating **technical support** and market intelligence through dedicated studies.

Number of publications by type

15	Country Assessments
15	Technical Studies
11	White Papers
17	Analytical Reports
20	Market Analyses

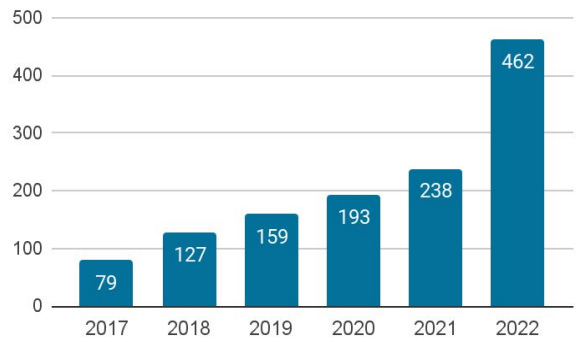
Quantifying mentions of RES4Africa's work over time can provide an estimate of how much the Foundation has been able to stimulate the debate among policymakers and the wider public

An extensive web analytics exercise done by PwC identified over 1.258 mentions of RES4Africa's reports, studies, trainings and conferences in the last 6 years. This figure refers to unique mentions by credible stakeholders, and include mentions in traditional media (which are covered in detail in section 2.4).

Over the period 2017-2022 there has been a remarkable growth in mentions of RES4Africa's work and activities by all types of stakeholders. In 2022, a sharp boost in media mentions reflects both the high profile of events (e.g. 10 year anniversary and COP side event) as well as an ever closer cooperation with key media outlets.

Mentions of RES4Africa's activities over 2017-2022

1.258 Mentions



Source: PwC on the basis of web analytics. Figures include mentions by conventional media, but not social media.

The mentions come from a diverse range of actors, including governments, international organizations, think tanks, and industry stakeholders. The stakeholder category that has most often mentioned RES4Africa's work and activities over the past 6 years is Governments, Agencies and International Organisations.This result shows how over the years the Foundation has succeeded in establishing itself as an influential voice in the debate on renewable energy and energy transition in Africa and in gaining greater resonance among decision makers and policy makers who are the Foundation's main target audiences.

Not surprisingly, the second category that has made the most mentions over the years is that of industry stakeholders. This result confirms RES4Africa's ability to connect and communicate with both businesses and governments, acting as a bridge between the two, and encouraging a fruitful exchange of information which can lead to meaningful change in the context of renewable energy sources in Africa.



Stakeholder categories

33%	Governments, Agencies and International Organizations
31%	Industry Stakeholders
23%	Foundations/NGOs/Think Tanks
13%	Academic Institutions

Source: PwC on the basis of web analytics. Figures does not include mentions by conventional media.

The following page provides a brief overview of who has spoken about RES4Africa over the past 6 years and which initiatives and studies have resonated the most.

What was mentioned the most?

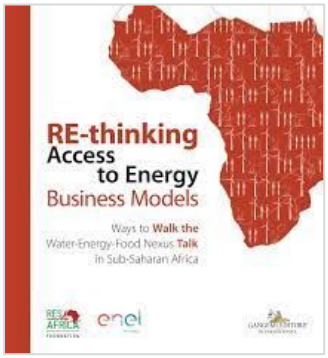
Top 3 most mentioned Initiatives:

Grids 4 Africa

MICRO-GRID ACADEMY

renewAfrica Initiative

Top 3 most mentioned studies:



RE-thinking Access to Energy Business Models: Ways to Walk the Water-Energy-Food Nexus Talk in Sub-Saharan Africa (2020)



The impact of COVID-19 on Africa's energy sector and the role of RE to empower a long term sustainable recovery (2020)



Connecting the Dots: Why Only 2% of Global RE in Africa (2021)

Who is talking about RES4Africa?
Top stakeholders by area

Governments, Agencies and International Organizations

European Commission

African Union

IRENA
International Renewable Energy Agency

United Nations Economic Commission for Africa

Industry Stakeholders

enel Green Power

Terna

Kenya Power

AFRY

Foundations/NGOs/Think Tanks

EACREEE
Building a Sustainable Energy Future

Alliance for Rural Electrification

Academic Institutions

Bocconi

CIRPS

KPI 2: Official Access to Policy Discussions

One of RES4Africa's goals is to provide a space for dialogue between policymakers and industry, in order to identify joint strategies and avenues for public-private partnerships fit to address the needs of the clean energy transition in Africa.

Africa's clean energy transition cannot be reached by one actor alone. Instead, it has become increasingly clear that it is crucial to involve a wide range of stakeholders, bringing both private and public actors together, to develop strategic partnerships and accelerate progresses on RE market in Africa.

To achieve this important objective, RES4Africa centered its approach on spearheading political dialogue, sharing expertise, transferring skills and creating an open hub for multi-stakeholder dialogues. The Foundation has thus positioned itself as a neutral platform for high-level political dialogue and a bridge-builder between a wide range of actors including industry, governments and international organizations to share knowledge, ideas and concerns around new RE market development.

The number of events RES4Africa has organized has grown sharply over the past six years.

Between 2017 and 2022 RES4Africa organized 79 events, covering 16 African countries. These events shed light on the distinctiveness of RES4Africa, which is to be business-driven and to represent an outstanding effort by the RE industry to speak to policy makers in Africa, and present hands-on, evidence-based, technical recommendations on a range of topics in the area of renewable energy and a just transition.

The Foundation's commitment did not stop during the pandemic. To ensure that the open and constructive dialogue continued, despite the challenging circumstances, RES4Africa doubled down on its online engagement, hosting close to 45 online events since 2020. This explains the growth of events in 2021, a year characterised by intense online activity, and the return to pre-pandemic levels in 2022, when mainly in-person events were organised.

To further boost dialogue with policy decision makers RES4Africa also introduced the "B2G events" format in 2017. These workshops have rapidly became a trademark of the Foundation, enabling a straightforward discussion on pivotal topics between the public and private sectors.

Key Figures (2017-2022)

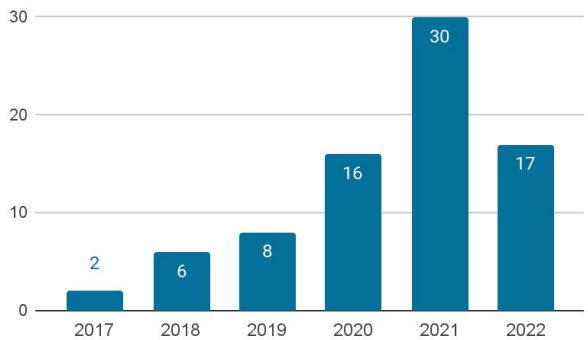
79 Events organized and delivered by the Foundation

60 Participations in external events as a speaker

26 Business to Governments events

16 Countries covered by the events

Number of RES4Africa's events over 2017-2022



Source: RES4Africa Foundation

Countries covered by RES4Africa's events over 2017-2022



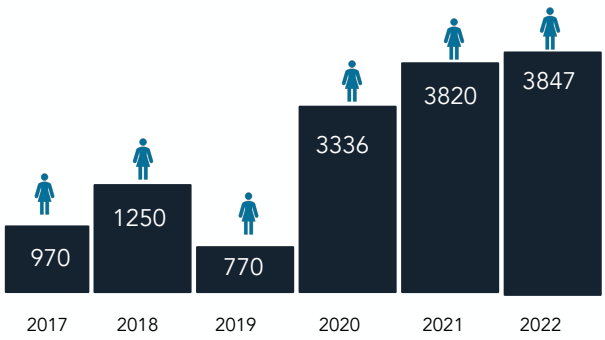
Source: RES4Africa Foundation

The importance of business to government (B2G) dialogue cannot be overstated. Financing needs for the clean energy transition far exceed most countries' already stretched public finances, making investments by the private sector and IPPs in particular of critical importance. The key, then, is to accelerate the pace of investments. Dialogue between policy makers and the private sector can act as a powerful catalyst, to help build trust, spur coordinated action, and generate a sense of combined ownership and shared goals. Seeking inputs and active buy-in from the investor community on policy content and design can help make policies more impactful, and avoid shortfalls in the relevance of investment climate reforms. Greater dialogue with the private sector can also help bridge knowledge gaps and facilitate a transfer of technical know how, especially considering the rising and accelerating interest of RES topics in many countries of relevance.

Events organised by RES4Africa were attended by almost 14.000 people between 2017 and 2022.

Between 2017 and 2022, RES4Africa events managed to involve almost 14.000 people in its events, including representatives from industry, governments, regulators, international organizations and NGOs, as well as students and private citizens.

Participants in RES4Africa's events over 2017-2022



Source: PwC based on RES4Africa Foundation figures

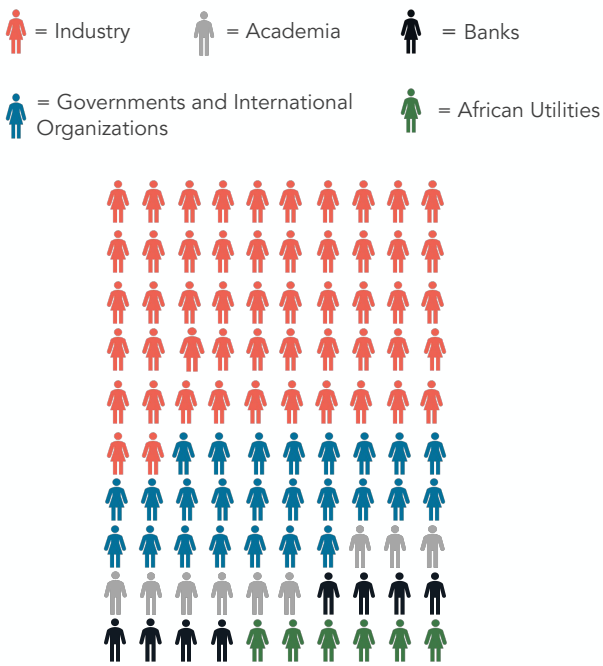
The number of participants has grown significantly over the years, demonstrating RES4Africa's ability to speak to a broader and more diverse audience. The high participant numbers also reflect the remarkable and somewhat unexpected success of online events, which stimulated accessibility also for young professionals and private citizens. The table below illustrates the breakdown of participants.

Breakdown of participants in RES4Africa's events over 2017-2022

52%	Industry
25%	Governments and International Organizations
9%	Academia
8%	Banks
6%	African Utilities

Looking at the breakdown of participants, it is clear that the private sector and businesses are key actors, representing the single largest group of stakeholders participating in the events. However, it is crucial to involve local governments and international organizations, whose participation has grown over time and will continue to be an important part of the Foundation's engagement work. Finally, the participation of young students, banks and African Utilities was remarkable, demonstrating how RES4Africa has succeeded over time in strengthening its capacity to involve young people, fundamental allies for the development of renewables in African countries, as well as actors at the forefront of the energy transition process, such as banks, which are key to accessing investments, and African Utilities, receivers of investments and implementers of the energy transition.

Breakdown of participants in RES4Africa's events over 2017-2022



Source: PwC based on RES4Africa Foundation figures

KPI 3: Demonstrated impact over policy

RES4Africa has been able to provide ahead-of-the-curve ideas subsequently embraced by policymakers, confirming its ability to be on the edge of policy innovation and influence policy conversation

In addition to quantitative measures of how RES4Africa influenced policy, case studies can provide a qualitative view. What are the Foundation's successes in achieving policy change or influencing the policy conversation? PwC chose three case studies to showcase some major success stories.

Case Studies

- renewAfrica
- South Africa Energy Transition
- The Missing Link

Policy-making is inherently a long, complex and multi-stakeholder process, where proving a direct line of influence or cause-and-effect between the Foundation's work and the policy direction taken subsequently is a challenge. For the needs of this study, we consider the Foundation had a demonstrated impact over policy where policies, practices or the official government discourse followed the same direction as that advocated previously by RES4Africa.

It is worth noting that RES4Africa has had a much wider impact beyond these three case studies: as a thought leader, it has provided ahead-of-the-curve ideas that are eventually embraced by policymakers; persistently supporting positions that may not initially represent the common consensus, but become mainstream over time.



Missing Link: supporting policy and regulatory reforms to improve Africa's electricity markets openness, attractiveness and readiness

The issue at hand

Private investment in Africa's energy markets is hindered in large part due to risk perceptions, with policy and regulatory frameworks featuring prominently as a concern for investors. Investment-friendly policy and regulatory frameworks are key to crowd-in private sector investment. The formulation and implementation of conducive policies and regulations play a crucial role in enhancing market openness, attractiveness and readiness towards private investments. Efficient electricity market design and governance, clarity and stability of rules and regulations, transparency and accountability are all fundamental to ensure reliable and competitive electricity supply, to increase sustainable energy development and to reduce electricity supply costs.

What RES4Africa did

In 2019 RES4Africa launched the Missing Link initiative, a strategic, multi-year programme looking at the electricity policy and regulatory environments in Africa. The Missing Link ambitions to work with interested countries on improving the preparedness of legislative and regulatory frameworks to crowd-in private-led investments across the electricity sector value chain. As the first implementation phase of this initiative, RES4Africa Foundation partnered with the United Nations Economic Commission for Africa (UNECA) to implement a comprehensive set of activities meant to support African countries in reforming electricity policy and regulatory environments towards better *openness*; *attractiveness*; and *readiness*.

The programme targets a total of 16 African countries, providing an extensive coverage and representation of African regions and is built around four main workstreams in line with RES4Africa value proposition: (i) analysis and research; (ii) advocacy and policy dialogue; (iii) training and capacity development; (iv) advisory and regulatory reform support.

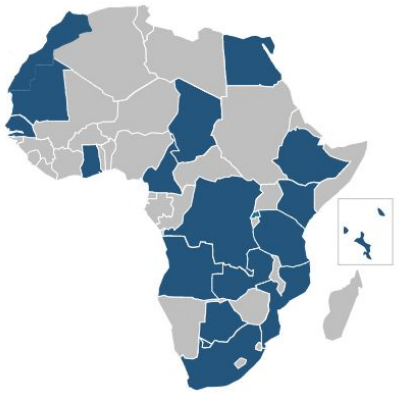
Advocate
Build consensus and political buy-in around possible roadmaps for reform

Analyse
Evaluate the effectiveness of national policies, laws, and regulations and define best practices

Support
Support the definition and implementation of reforms

Train
Enhance national capacity for regulatory reforms

Country coverage of the Missing Link initiative



Source: RES4Africa Foundation



The impact mechanism

The program ambitions to support fit-for-purpose policy and regulatory improvements meant to facilitate private sector participation in electricity infrastructure investments by:

- Quantitatively evaluating the effectiveness of national policies, laws, and regulations vis-à-vis private investors' needs by establishing an innovative and comprehensive analytical framework which investigates the ability of African countries' electricity policy and regulatory framework to attract private investments, and collecting and validating data involving local electricity sector stakeholders. This work has resulted in: 12 country reports published; 4 reports being finalised with publication planned for early 2023;

- Enhancing public-private dialogue on electricity policy and regulatory topics and building consensus and political buy-in for potential roadmaps for reforms: R4A events in Cairo, Dakar and Rabat on "Accelerating Africa's Energy Transition"; UNECA – R4A event in Addis Ababa on "African electricity markets regulatory reviews and proposal for a Continental Regulatory Framework to Crowd-in Private Sector Investments in Africa's electricity markets". Similarly, R4A and UNECA are planning to host a High-Level Public-Private Dialogue on Private Sector Investment in Electricity and Infrastructure Development in Africa at the begin of 2023 with the support of the Italian Ministry of Foreign Affairs and International Cooperation;

- Strengthen national capacity to conceive, adopt, and implement regulatory reforms via: development of the Regulatory Openness, Attractiveness, and Readiness (R.O.A.R) software that will be launched at the begin of 2023; ad hoc trainings and conferences (MGA for MENA region with RCREEE and LUISS Executive First Level Master in Global Public Diplomacy and Sustainable Development);

- Supporting interested African stakeholders in the definition and implementation of reforms to crowd-in private sector investments: a working group for the draft of a High-Level Continental Electricity Regulatory Framework for private sector participation has been launched and the continental report is going to be presented to the African Union Commission at the beginning of the year.

Outcomes and Policy impact

Through the Missing Link initiative and its collaboration with UNECA, RES4Africa has been able to enhance the voice of the private sector in the international debate around the clean energy transition in Africa and what is needed to achieve SDG-7 by 2030. RES4Africa activities helped highlight the role of conducive policies and regulations to attract private investors, and mainstream the concepts of market openness, attractiveness, and readiness. This impact is appreciable at three levels:

- Globally, the UN recognized the language launched by RES4Africa and UNECA and endorsed these concepts during the High-Level Dialogue on Energy, which recognizes the importance of improving market openness, attractiveness and readiness through policy and regulatory reforms in Recommendation 8 of the Theme Report on Finance and Investment.

- In the African political sphere, the African Union's Specialized Technical Committee on Transport, Transcontinental and Interregional Infrastructure, Energy and Tourism (STC-TTIIET) commends the regulatory review initiative for its efforts to crowd in private investments and endorses the need to reform African electricity policy and regulatory environments towards better openness, attractiveness and readiness.

- Finally, RES4Africa Foundation, in partnership with UNECA, held a two-days consultative meeting to advance electricity market regulation for private sector investment. The expert meeting marked another major milestone for the R4A-ECA partnership in disseminating the main deliverables of their strategic partnership and engaging with national authorities to advance the electricity reform agenda in Africa.

renewAfrica: an industry-backed initiative which resonated with policy makers

The issue at hand

Africa's energy landscape is shaped by a paradox: despite huge untapped energy demand, abundant natural renewable energy resources and huge amounts of international private capital being available, renewable energy project development has seen only modest growth over the past decade. Why is that? An often-repeated explanation points to investment risks that act as obstacles to private sector capital inflows. The European Union and its Development Finance Institutions currently manage a plethora of de-risking instruments specifically aimed at boosting renewables investments in Sub-Saharan Africa. Yet the variety and fragmentation of these instruments in terms of the institutions managing them, amounts, scope, geographies, technologies, project sizes and stages they cover, as well as low awareness of their availability and their contractual complexity tend to hamper the effectiveness of these instruments.

What RES4Africa did

renewAfrica is an industry-backed initiative launched in June 2019 advocating for the creation of a comprehensive European one-stop-shop programme able to support investments throughout the project life cycle in utility-scale renewables in Africa. The programme envisaged by renewAfrica would comprise an appropriate mix of policy support, capacity building, technical assistance and financial support.

The initiative is backed by 27 major stakeholders from across the European renewables value chain, including public and private sector financial institutions, manufacturing, consulting, Independent Power Producers and industry associations. The RES4Africa Foundation has been entrusted to carry out the duties of the Initiative's Secretariat. Between 2019 and 2021, four Task Forces took on the task of developing a blueprint for the one-stop-shop programme.

The impact mechanism

The RES4Africa Foundation spearheaded the impact of renewAfrica via the following activities:
Development of analytical content to proactively identify gaps and propose solutions, including

- Handbook of Working Groups
- renewAfrica Landing Guide
- Financial Support Task Force Summary Memo
- renewAfrica Presentation Card
- 10 Guiding Principles

High-level advocacy to call attention to the urgency and importance of the topic, including

- Presentations at a G20 and pre-COP event
- Meeting with EU Commission Vice President Frans Timmermans
- Regular technical consultations with key EU representatives from the External Action Service, EU Delegations in Africa, as well as DG INTPA and DG ENER.
- Dialogue and outreach events in African countries to verify interest to host a programme such as renewAfrica (notably events in Kenya, Mozambique and Senegal).
- In 2022 renewAfrica renewed its commitment to support constructive dialogue in Africa, carrying out its core engagement activity to include Senegal, where the Initiative was well received by the more than 120 participants from the local public and private sector during the outreach event held in Dakar in October.

Outcomes and Policy impact

While the instrument proposed by renewAfrica is yet to be created, a series of developments indicate that the key message of renewAfrica - the need to reduce fragmentation of EU instruments - has resonated with EU policymakers. Evidence of this includes:

- The spearheading of the "Team Europe" approach by the European Commission in 2020, which calls for all EU institutions and those of EU Member States to act as one team and thus strengthen the visibility of the European approach
- The creation in 2021 of the Global Europe instrument, which merges several former EU external financing instruments and thus reduces fragmentation
- The proposal for the creation of a new Africa-EU Green Energy Initiative, which ambitions to provide comprehensive investment support to RES in Africa, very much in line with renewAfrica's recommendations. renewAfrica was cited in the official European Council preparatory document for the Green Energy Initiative.
- On July 12th 2022, EIB and CDP sent an application under the European Fund for Sustainable Development + (EFSD+) through a coordination effort with other DFIs. The presented concept note proposes "RISE - Renewable Infrastructure & Sustainable Energy Partnership Africa EU", based in part on the recommendations issued by renewAfrica. The proposal has been approved by the Commission, the next step is the designation of a consultant tasked to help shape the guarantee, and liaise with the private sector including RE4Africa to structure the final product.

Milestones of renewAfrica activities in 2022

January 2022

Participation to Get.Invest Stakeholder Consultation.

March 2022

1) High-level meeting Ing. Bernabei as President of RES4Africa and Mr. Doens, Director General DG INTPA.
2) renewAfrica presented during the SolarPower Europe Summit in Brussels.
3) MoU signed with AMER, Mozambique Renewable Energy Association.

May 2022

Stakeholder engagement mission in Dakar, Senegal

July 2022

1) renewAfrica as part of the training at LUISS provided by RES4Africa
2) EIB and CDP presented the RISE proposal to the EU Commission, based on renewAfrica recommendations.

October 2022

1) Outreach event in Dakar, Senegal
2) Stakeholder engagement mission in Ivory Coast

November 2022

Paper to map the current status of EU-AU energy relations, as part of the monitoring effort carried out by the Initiative

December 2022

1) Stakeholder engagement activities with Ghana (Energy Commission, EU Delegation, Institute for Energy Security, Africa Centre for Energy Policy).
2) Letter of Intent signed with Institute for Energy Security in order to organize an outreach event in Ghana, foreseen for Q4 2023"



South Africa Energy Transition



The issue at hand

Within the Sub-Saharan Programme, special attention is given to South Africa, the largest electricity market of the continent. Now with a permanent desk in Johannesburg, RES4Africa Foundation is committed to support the clean energy transition of the country which, despite the successful initiation of a renewable energy transition, is still highly dependent on coal.
In a country where fossil fuels are such a significant part of the economy, RES4Africa aims to play an active role on the ground by contributing to the roadmap design for an effective and just energy transition: in partnership with local partners and stakeholders, the Foundation carries out the development of key studies and three showcase initiatives, AM-Powering Connexions, Re-Skilling Lab and Executive seminars.

The impact mechanism

The South Africa Energy Transition programme's goal is to to offer a programme of support which leverages on our local presence and close relationship with key energy sector entities. Through the relationships that have been nurtured with local stakeholders, the South Africa Energy Transition Program has become an open platform for analysis, knowledge sharing, networking, and mutual support between locals and our international members.

To ensure that topics covered have the desired impact on the evolution of local electricity market, the program has focused on overarching themes that have dominated electricity sector discourse. So far, deliverables have closely mirrored, and in some cases anticipated, milestone renewable energy regulatory developments - the result of an acute understanding of the local context and ability to effectively interpret sector trends.

Reports and Studies

Detailed analyses in the form of studies and reports have formed the backbone of the initiative. Each study or report has been accompanied by a dedicated event to effectively disseminate findings ensure that key information is reaching the right stakeholders. The online format has ensured that an average of over 300 people has attended each event, setting strong foundations for the return of in-person events and the consequent direct engagement with stakeholders.

RES4Africa Study	South Africa Renewable Energy Market Milestone
A Just Energy transition in South Africa (Sep 2020)	○ Integrated Resource Plan (IRP) 2019 Published. Sets out renewable energy procurement plan and targets up to year 2030 including coal plant decommissioning timeline (October 2020) ○ Eskom Just Energy Transition (JET) Strategy Announced (Aug 2021)
Fostering Renewables within an Independent Network System Scenario (May 2021)	○ Eskom Transmission Unit Unbundling Agreement to unbundle Eskom transmission unit was executed (DEC 2021) ○ Electricity Regulation Amendment Bill announced (Feb 2022)
Commercial and Industrial Renewable Energy Market for South Africa (July 2021)	○ Generation licensing cap raised to 100 MW (June 2021) ○ Cape Town announces tender for 300 MW of RES + Storage (Feb 2022)
Possible Decarbonization Roadmap for South Africa (Nov 2021)	○ South Africa revises NDC at COP26 (Nov 2021) ○ $8.5 billion pledged by US and EU countries to assist SA's decarbonization (Nov 2021)
Integration of Non-Programmable Renewable Energy in the National Electricity System of South Africa (2022)	○ GCCA Phase 1 and phase 2 reports published (Jun & Oct 2021) ○ Publication of Eskom Transmission Development Plan (TDP) 2023-2032 (Oct 2022)
Regulatory Assessment of Battery Energy Storage Systems in South Africa (2022)	○ Risk Mitigation IPP Programme tender awards RES+BESS projects (Mar 2021) ○ Record year of load shedding in 2022

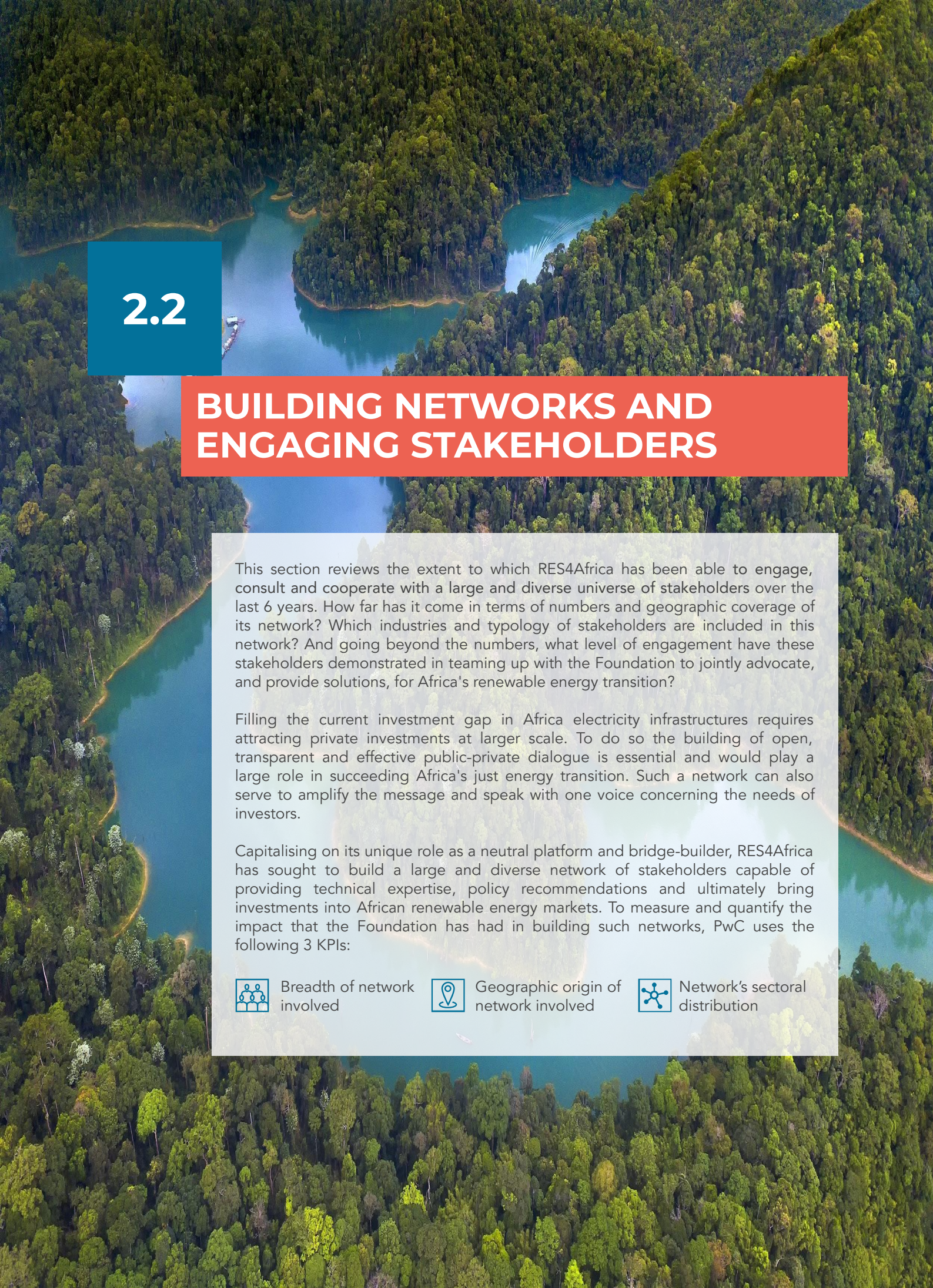
AM-Powering Connexions

AM-Powering Connexions is a discussion series, open to anyone from South Africa interested in the energy sector, which has been successful in maintaining frequent contact with South African stakeholders. Each session covers a hot topic or important development in the country. Subject experts are invited to give opening presentations explaining the issue at hand and its implications, to then participate in an open discussion with those present for the second half. Through AM-Powering we have greatly extended our network in South Africa, with current subscribers almost reaching 500. With topics decided on a monthly basis to follow key announcements, AM-Powering Connexions is one of the first ports of call to digest and discuss market news with experts who are directly involved. Continuing on from 2021, the 8th and 9th sessions of the AM-Powering Connexions series took place focusing on "the critical role of BESS in a competitive South African electricity market" and the "evolving electricity procurement landscape: driving factors and new challenges", respectively. Both continued the trend of having 70+ attendees and an ever-growing list of subscribers and continues to be a successful space for open dialogue between stakeholders of all levels.

AM-Powering Connexions Session	Speakers	RE Sector and JET News
Repurposing of Decommissioned Coal Plants	Eskom, Siemens Gamesa, Matleng Energy Solutions	Eskom announces that RFP for repurposing or re-powering of closing plants will be launched
Risk Mitigation IPPP Tender Review	SAWEA, SAPVIA, SAESA	Risk mitigation IPP tender review preferred bidders announced
Independent Network System Scenario for South Africa: Deep Dive	CESI, CSIR, SAIPPA	Publication of RES4Africa Study on same topic Unbundling of Eskom announced as being on track for June 2021 and to be completed by end of 2022
Municipalities Towards the Energy Transition	IFC, City of Cape Town, PwC South Africa	Amendments to national electricity regulations gazette in October 2020 paved way for municipalities to source directly from IPPs
Creating a C&I Market for South Africa	CSIR, Enel Green Power, Nedbank, McKinsey	Generation licensing cap lifted to 100 MW
RE Job Skills Availability to Approach the Ongoing Electricity Market Evolutions	EWSETA, Vestas	General discourse on RE job creation due to speed of sector growth in 2021
Managing RES Localization and Grid Capacity to Extract Maximum Value from IPPs	Eskom (presented GCCA Report Phase 2), CSIR, African Clean Energy Developments	Eskom Generation Connection Capacity Assessment (GCCA – 2023) – Phase 2 Document Published
The Critical Role of BESS in a Competitive South African Electricity Market	PwC South Africa, City of Cape Town	DMRE published proposed Electricity Regulation Act 2nd Amendment Bill Cape Town announces tender for 300 MW renewables energy or renewables + storage

ReSkilling Lab & Executive Seminars

The South Africa Energy transition is engaged in capacity building activities to support the "just" portion of the Just Energy transition. The Reskilling Lab is the initiative's flagship capacity building program launched following indications from Eskom to assist the local community based around Eskom's Komati Power Station, the first to be decommissioned. A Working Group composed of RES4Africa members and local industry associations, academic institutions, government entities, and international development partners was created to design the programme. Over the course of 5 online Working Group sessions, Working Group members defined the target audience (teachers and students of Nkangala TVET), training locations (Nkangala TVET campuses), curriculum (South African Skills programme) and the creation of a consortium to take charge and manage the RE-Skilling lab going forward. The RE-Skilling Lab work culminated with its launch event-cum-stakeholder consultation in November at the Nkangala District Municipality in Mpumalanga province, which was attended by more than 100 local stakeholders.



2.2

BUILDING NETWORKS AND ENGAGING STAKEHOLDERS

This section reviews the extent to which RES4Africa has been able to engage, consult and cooperate with a large and diverse universe of stakeholders over the last 6 years. How far has it come in terms of numbers and geographic coverage of its network? Which industries and typology of stakeholders are included in this network? And going beyond the numbers, what level of engagement have these stakeholders demonstrated in teaming up with the Foundation to jointly advocate, and provide solutions, for Africa's renewable energy transition?

Filling the current investment gap in Africa electricity infrastructures requires attracting private investments at larger scale. To do so the building of open, transparent and effective public-private dialogue is essential and would play a large role in succeeding Africa's just energy transition. Such a network can also serve to amplify the message and speak with one voice concerning the needs of investors.

Capitalising on its unique role as a neutral platform and bridge-builder, RES4Africa has sought to build a large and diverse network of stakeholders capable of providing technical expertise, policy recommendations and ultimately bring investments into African renewable energy markets. To measure and quantify the impact that the Foundation has had in building such networks, PwC uses the following 3 KPIs:

- Breadth of network involved
- Geographic origin of network involved
- Network's sectoral distribution

KPI 1: Breadth of network involved

The first KPI in this section aims to assess RES4Africa's ability to engage a broad group of stakeholders and to create and/or maintain long-lasting relationships with actors of different nature. In recent years, and especially since 2017, RES4Africa significantly expanded its members and partners base, growing from a small group of mission-driven industry majors to an internationally recognised body that acts as a bridge between African policy makers, the private sector and European institutions.

Over the years RES4Africa has managed to consolidate a large and growing network of stakeholders from different sectors and geographical areas.

The base of RES4Africa's Members has remained broadly stable over the years, reflecting the continued confidence that such actors have in the value of their contribution to the Foundation's work. Where the stakeholder network has grown significantly is in Memorandums of Understanding (MoUs) and Letters of Intent (LoIs). Two types of partnerships stand out: bilateral relations, which provide added value in market understanding and access to local networks, and regional and international organisations, whose added value is in reinforcing RES4Africa's positioning as a contributor to the broader work of the international community of renewable energy practitioners and thought leaders.

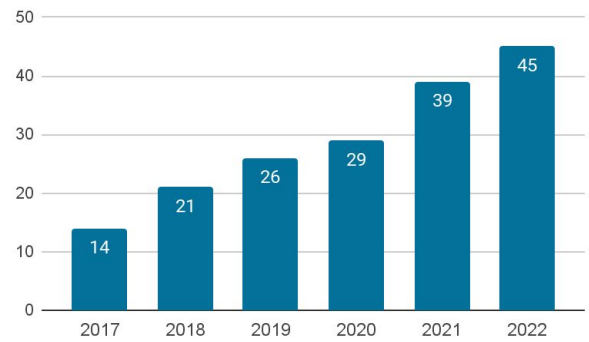
The expansion of the network did not happen by chance; rather it reflects a conscious effort to review the governance of the Foundation in the interest of greater inclusiveness. The network of MoUs and LoIs has particularly grown in Africa, thus amplifying the impact and weight that the Foundation has in its dialogue with local policy-makers.

34 Members

45 MoU*/Letters of Intent

* The MoU figure refers to a cumulative number, and not only to those MoUs signed in 2022.

Number of MoUs and Letters of intent over 2017-2022



Source: RES4Africa Foundation

New RES4Africa Governance Working Group

RES4Africa International Advisory Board

Leveraging the prestige and the growing number of stakeholders built up over 10 years, in 2022 the Foundation created the first RES4Africa International Advisory Board. The Advisory Board gathers a group of independent voices and energy leaders, widely recognized as experts in their respective fields. The members provide their strategic advice and insights on the defining challenges and opportunities to advance Africa's energy transition and to scale up renewable energy investments across the continent.

The Advisory Board will be key to define innovative, forward-looking strategies and support the Foundation in promoting its international engagement and pursue its mission of creating an enabling environment for renewable energy investments.

RES4Africa Youth Task Force

In 2022 RES4Africa created the Youth Task Force to activate a network of both local and regional partners of youth organizations to advocate and implement activities in the countries and regions where it operates. The YTF provides a platform for young networks to propose and discuss priority areas of action, support the exchange of best practices and knowledge transfer as well as stimulate cooperation within the youth sector and among sectors and fields of expertise. The YTF helps RES4Africa to involve the voice of youth in ongoing activities and future projects.

The Task Force meets online approximately every two months. Since its first online meeting in April 2022, the YTF has met on several occasions: an in-person meeting organised by the Foundation in the PwC tower in Milan (June 2022); as a RES4Africa delegation in the African Climate Week in Gabon (organised by UNFCCC in preparation for COP27); and at the centre of a side event organised during COP27.

KPI 2: Geographic origin of the network involved

Since 2017 the geographic spread of RES4Africa's network expanded, in line with an increasing internationalization of its areas of work

Over the past 6 years, the geographic expansion of RES4Africa's analytical work has come hand-in-hand with an expansion of its network of stakeholders. As of 2022 the network of the Foundation comes from 17 countries in Europe and Africa, and to this number one needs to add transnational and / or regional stakeholders.

The first distinctive trend of geographic expansion has been towards European industrial stakeholders, moving on from the initial focus on Italy. This expansion within Europe served to give more weight, influence and credibility to the Foundation's effort to speak with EU institutions as a voice of European investors and industrial majors.

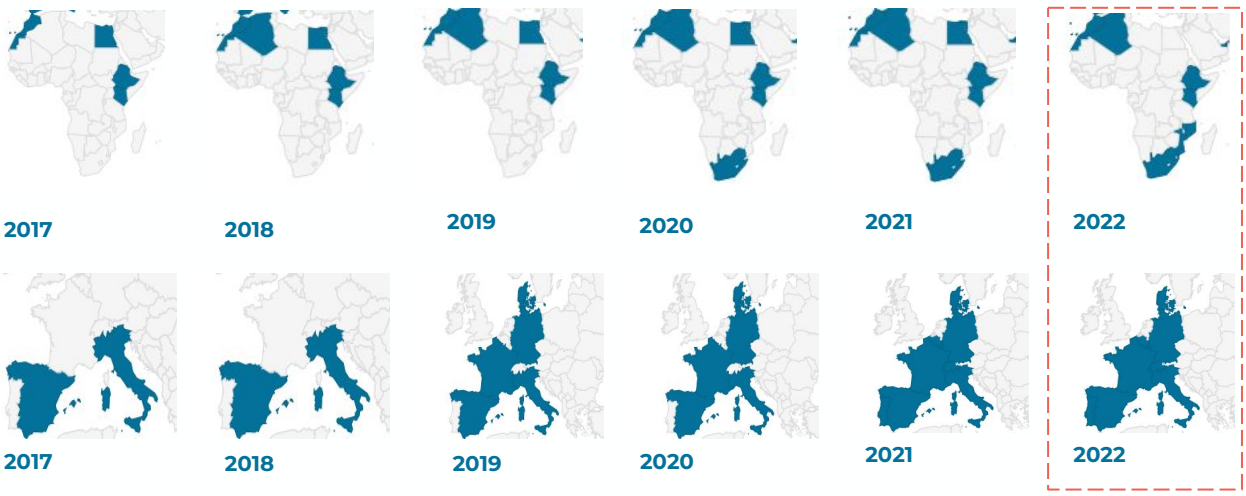
In parallel to this development, the focus of the Foundation's analytical work (studies, events) expanded beyond the Med region towards Sub-Saharan Africa. This served as both cause and effect of the expansion of the stakeholder network: local stakeholders provided valuable local market insights, and also opened the door to a deeper dialogue with local policy-makers. *This happened mainly through the signature of MoUs with various African actors, as well as the joining of two African players as Foundation members.*



What is the impact of this geographic expansion of the network? A geographically diverse base…

- …enables the Foundation to produce analytical content and policy insights which are better suited to local needs, and are therefore more likely to be impactful.
- …reinforces the image of the Foundation as an honest broker, able to build bridges and represent the broad views of the European RES industry in an unbiased manner.

Geographic evolution of RES4Africa's network in Africa and Europe over 2017-2022



Source: RES4Africa Foundation. For members and partners that have a regional presence, the country considered has been the country where the organization has its headquarter.

KPI 3: Network's sectoral distribution

Achieving RES4Africa's mission - *creating favourable conditions for scaling up investments in clean energy technologies* - is a multifaceted challenge which requires the cooperation of a broad range of actors from all sectors of the economy. For this reason, having a broad sectoral representation among the Foundation's network is an important element of strength.

As of 2017 the Foundation opened its membership to new institutional actors, which provided a boost to the sectoral diversity of its member base. Notable new joiners include actors from the institutional world such as CDP, and legal firms such Bonelli Erede Pappalardo.

As of 2018 the Foundation welcomed actors with an important existing portfolio of investments in Africa such as Siemens Gamesa and Intesa Sanpaolo Bank. This presence reinforced the Foundation's analytical work on financing and investments, boosting the effectiveness with which it can pursue its mission.

The representation of the finance sector was reinforced in 2020 with the joining of Nedbank, which also happens to be the Foundation's first African member - thus marking a milestone.

Milestones of RES4Africa membership

2017

Acceleration of the network expansion process and opening to new institutional players and legal firms

2018

European market players and financing actors involved in the network

2019

Birth of RES4Africa Foundation as we know it today and boost to the internationalization process

2020

Large international industrial players involved and first African members joined the Foundation

2021 - 2022

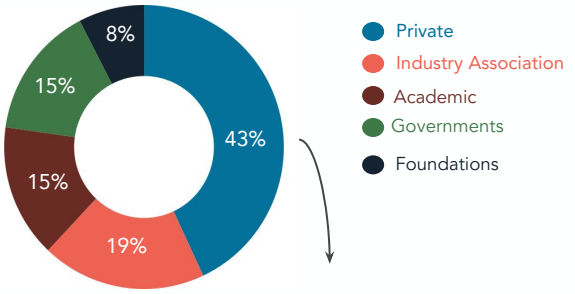
The expansion process continues and European-African partnership is strengthened

Source: RES4Africa Foundation

Looking at the sector breakdown in 2022, most Foundation members are from the private sector and industry associations spanning players from across the renewable energy value chain (project sponsors, finance, construction and O&M). In addition to this, the Foundation has built important partnerships with representatives of governments, international agencies, Foundations and NGOs as well as Academic Institutions and Industry Associations.

The richness and variety of the RES4Africa network and its evolution over time show how the Foundation has been able, over the years, to involve an ever-increasing number of players and sectors, succeeding in transforming its role from "facilitator" to "active promoter" of renewable energy and energy access projects across Africa.

Breakdown of RES4Africa's network by sector in 2022



Equipment Manufactures	Epc Contractor
Project Developers	IPP / Investors
Finance and banks	O&M Asset Management

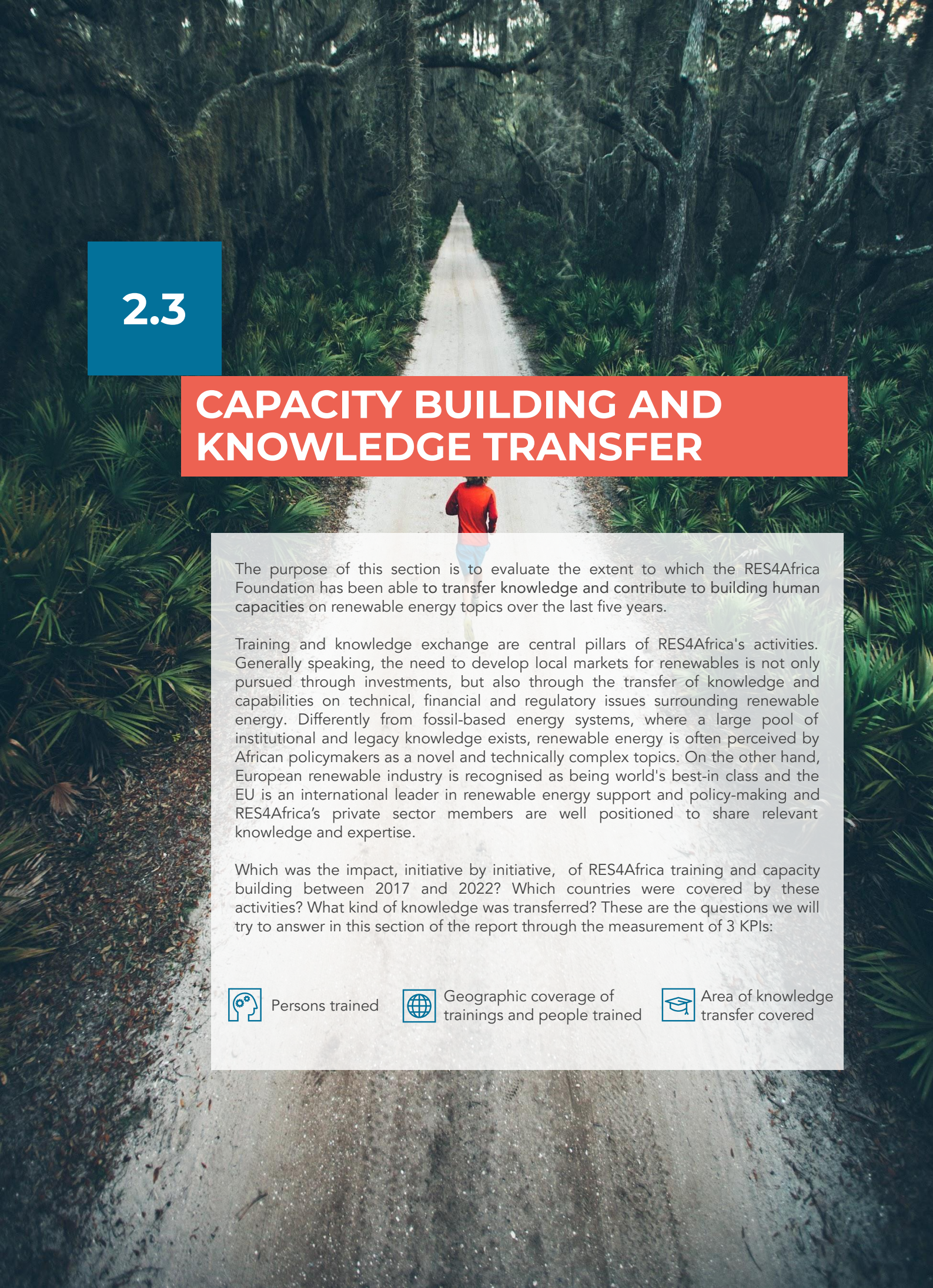
Source: RES4Africa Foundation

New members and MoUs planned for 2023

RES4Africa is developing important MoUs with some internationally well-known actors, that will become official in 2023. These include representatives from the institutional world such as the African Development Bank, UNDP, ONEE, MTEDD and some major Foundations and NGOs such as the Rockefeller Foundation and SEforALL.
In 2023, ABB and Gridspertise will also join the RES4Africa Foundation's membership base.

Such agreements will help create important synergies to accelerate the development of renewable energies in Africa and will strengthen the Foundation's presence in the international arena, thus expanding its reach.

Source: RES4Africa Foundation



2.3

CAPACITY BUILDING AND KNOWLEDGE TRANSFER

The purpose of this section is to evaluate the extent to which the RES4Africa Foundation has been able to transfer knowledge and contribute to building human capacities on renewable energy topics over the last five years.

Training and knowledge exchange are central pillars of RES4Africa's activities. Generally speaking, the need to develop local markets for renewables is not only pursued through investments, but also through the transfer of knowledge and capabilities on technical, financial and regulatory issues surrounding renewable energy. Differently from fossil-based energy systems, where a large pool of institutional and legacy knowledge exists, renewable energy is often perceived by African policymakers as a novel and technically complex topics. On the other hand, European renewable industry is recognised as being world's best-in class and the EU is an international leader in renewable energy support and policy-making and RES4Africa's private sector members are well positioned to share relevant knowledge and expertise.

Which was the impact, initiative by initiative, of RES4Africa training and capacity building between 2017 and 2022? Which countries were covered by these activities? What kind of knowledge was transferred? These are the questions we will try to answer in this section of the report through the measurement of 3 KPIs:

- Persons trained
- Geographic coverage of trainings and people trained
- Area of knowledge transfer covered

KPI 1: Persons trained

RES4Africa develops and leads a diverse number of strategic initiatives and programs to translate words into action and accelerate Africa's renewable energy transition. Since its constitution, training and seminars are key pillars of RES4Africa's strategy to pursue its goals and mission. The RES4Africa Academy, born in 2022, is the environment in which all the training initiatives will converge. The academy will be structured as follows:

- Flagship recurrent initiatives such as the Advanced Training Course and the Micro-Grid Academy.
- Country/thematic tailored training such as the Re-skilling Lab, the Grid development Lab and the Executive Seminars.
- Knowledge Platform: an online platform offering free, self-paced training by creating a common ground of technical knowledge, organised in modules.

The longest active training programmes, i.e. ATC MGA and Executive Seminars, are analysed below, along with some insights into the first phase of the RE-skilling Lab in South Africa, which started in December 2022.

Advanced Training Course

In 2014, RES4Africa launched the Advanced Training Course (ATC), a comprehensive capacity-building programme targeting managers, institutional and high-level profiles working in the RE sector in Africa. The annual training course provides participants with technical, regulatory, financial and sustainability knowledge across the RE value chain. The six annual editions held between 2017 and 2022 attracted a growing number of applicants and trained over 1000 people.

Micro-Grid Academy

As of 2018, the ATC has been complemented by the Micro-Grid Academy (MGA), a training programme targeting young professionals and students, whose major objective is to create a skilled workforce to implement decentralised renewable energy solutions, thereby improving energy access in rural communities while promoting local enterprise and job creation. Since its first edition in 2018, the Micro-Grid Academy trained 1743 people from 42 African countries.

Executive Seminars

RES4Africa also delivers Executive Seminars targeting high-level audiences such as representatives of governments or public companies involved in the energy sector. The Foundation's unique point of strength lies in its ability to communicate and transfer evidence-based technical knowledge to a high-level audience of policymakers.

Trainings and seminars held by RES4Africa over 2017-2022



Source: RES4Africa Foundation.

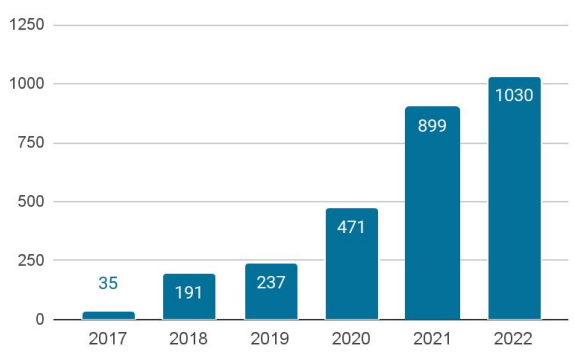
Between 2017 and 2019 RES4Africa delivered 9 Executive Seminars involving more than 400 participants representing governments and/or companies from 6 African countries as well as Italy and the European Commission.

RE-skilling Lab

Re-skilling Lab is a long-term capacity building programme to accelerate the mind shift of Mpumalanga's coal communities towards a sustainable economy by enabling local training entities to equip youth on the ground with certified renewable energy skills.

In January 2023 the Re-skilling Lab will start to deploy a pilot project, in collaboration with the Nkangala TVET college in Mpumalanga, articulated in two phases: TVET capacitation and provision of training to learners. The project have seen the participation of 10 technician in the energy field.

Total number of participants in RES4Africa's trainings over 2017-2022



Source: RES4Africa Foundation. The total number of participants does not include participants in Executive Seminars and RE-skilling Lab. Half of the participants in the 2021 online edition of the ATC were distributed in 2022, as the course spanned the two years.

RES4Africa's trainings and seminars address the need to expand the knowledge base on renewable energy topics and, most importantly, to educate youth. Africa is undergoing a demographic revolution and is currently the youngest continent in the world. *With more than 75% of its people under the age of 35, it is clear that Africa's true potential lies in its young people* who, with the right tools, have the skills to support a stronger and more inclusive economic development and an acceleration of the energy transition process.

For this reason, providing knowledge and technical skills to youth is an important strategic focus of the Foundation. Through the ATCs and MGA, RES4Africa is committed to transferring unbiased technical knowledge and skills among young people. At the end of each edition of both ATCs and MGA, RES4Africa normally submits a satisfaction questionnaire to the participants to assess potential areas for improvement and/or any impact on their career path. With regard to the ATC, in 2022, the students reported a high level of satisfaction with the course as a whole, showing a strong interest in all regulatory, economic and financial aspects related to renewables. Overall, the training was efficient and effective and all students expressed they would like to be engaged in further activities of the Foundation.
For the 2021 MGA edition, RES4Africa went a step further. Being a programme focused on the creation of a skilled workforce, the Foundation decided to submit a questionnaire to 111 participants to assess the impact it had on job placement and career development. The results of this analysis showed that:

- 95% of respondents got networking opportunities
- 98% of respondents got work skills and career improvement
- 41% of respondents got new job opportunities

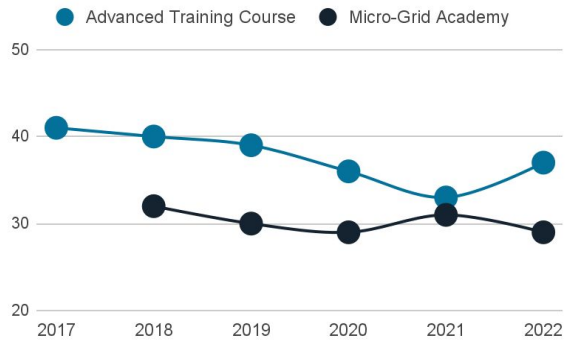


Looking into the numbers, almost 65% of people trained through ATCs and MGAs between 2017 and 2022 were between 22 and 35 years old. This percentage rises to 74% if we only consider participants in MGA, RES4Africa's programme specifically designed to target young people.

The number of applicants has been growing over the years, and the age of the participants followed a generally decreasing trend. This testifies about the ability of the Foundation to attract and speak to young people, laying solid foundations for an African energy system based on renewables.

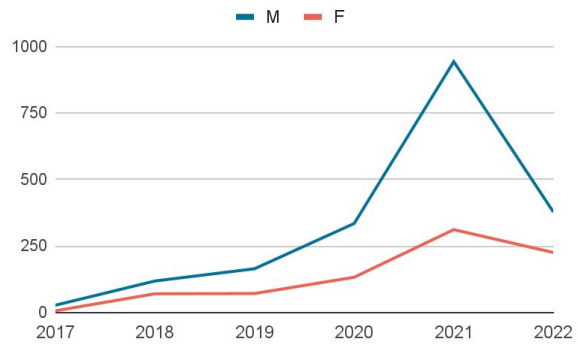
When it comes to gender composition, male participation remains predominant - *mainly explained by the higher proportion of male students in STEM courses. But female participation in RES4Africa trainings has been steadily increasing from 20% to 37% between 2017 and 2022.*

Median age of participants in RES4Africa's trainings over 2017-2022



Source: RES4Africa Foundation. The graph does not include data on Executive Seminars and RE-skilling Lab

Gender distribution of RES4Africa's trainings over 2017-2022



Source: RES4Africa Foundation. Gender distribution does not include participants in Executive Seminars and RE-skilling Lab

Micro-Grid Academy Young Talent of the Year Award

One of RES4Africa's goals is catalysing entrepreneurship and economic opportunities for young people. After a successful and rewarding 1st edition, RES4Africa Foundation launched, with the support of Enel Green Power and in the framework of the Micro-Grid Academy (MGA), the Young Talent of the Year Award, a competition which encourages young energy entrepreneurs from across the continent to develop projects that expand energy access, enable greater use of renewable energy and accelerate sustainability.

In the 2022 Edition, nearly 60 people submitted an application for the award. While only four innovators received the 3 prizes and a special mention, the contest provided an opportunity to stimulate debate on innovative, sustainable and cutting-edge ideas among young people, generating a positive impact for the acceleration the energy transition in Africa that goes beyond the contest itself. Below is a success story of an applicant from the first edition.

The Empowering Force of Sustainability: Norah's journey

Do you remember **Norah Magero**? If you are committed to Africa's energy transition, odds are you already read or heard about her. At RES4Africa we met her more than a year ago, on the occasion of the first edition of our **Micro-Grid Academy Young Talent of the Year Award**. She had applied to the contest with *Koyo,* an affordable 50-litre solar-powered fridge and freezer, developed with *Drop Access*, an organisation dedicated to the provision of sustainable energy access to rural communities in Africa. Impressed with her determination and resourcefulness, the MGA Evaluation Committee voted to assign the Kenyan engineer and entrepreneur one of the three monetary prizes at stake and to provide *Drop Access* with visibility and networking solutions. But that was just the start of Norah's story.

From Words to Deeds

A little over a year later, Norah persists in her mission with passion and enthusiasm, fully conscious that it goes way beyond building a successful business. She relies on a vision of **renewable energy** so well-structured and fact-based, that is practically a mini masterclass of sustainability. As she explains, *"Renewable energy holds the keys to unlocking immense potential for growth and access for African communities; […] depriving people of energy security […] has slowly become a human right issue".*



Norah's concept of sustainable energy is based on Africa's "vast untapped resources for renewables", which should be put at the service of rural off-grid communities. Only in this way the **productive uses of energy** can truly be unleashed, ensuring that their added value is given back to the communities: **universal access to electrification, better healthcare, improved gender equality and, ultimately, a more prosperous life for all**. And *Koyo* was, literally, the materialisation of Norah's vision: an object as simple as a fridge, with the incalculable potential of changing so many lives. Winning the first edition of the MGA Award could be considered as an accomplishment in itself…but for Norah, it was just a launchpad to build something even bigger.



Change, Adapt, Overcome

COVID-19 brought a particularly harsh impact in Africa and exacerbated the challenges of inadequate access to energy and healthcare. Sometimes, however, it takes just a small, innovative step to leave a deep mark. *"Since winning the MGA Award, we managed to adapt our product from a food-based solar refrigerator (Koyo) to a Vaccine refrigerator (VacciBox), and also conduct a successful pilot at 2 sites in Kenya. The first site is Usungu Health Centre […] located in Kibwezi West Sub-County […] the second site is at Merrueshi Village Health Centre located in Maasai Simba Camp/Conservancy"*.

Once again, the seeds of truly impactful actions could crop up, as they were planted in a solid ground of awareness. Both the pilot locations are either widely off-grid, or rely on inadequate medical facilities and energy infrastructures. To illustrate the seriousness of the situation, Norah tells us that the *Merrueshi Village Health Centre "Can only stock a limited number of child-based vaccines, since the facility uses a soda fridge to store [them, ed…] They used an icebox to transport vaccines and always incurred in vaccine loss and wastage"*. However, thanks to *VacciBox*, in *Merrueshi* it is now possible to safely transport vaccines, without incurring in the risk of spoilage. On top of that, *Usungu Health Centre* managed to increase the vaccination rate in the area by 45%. More than a business accomplishment: a gift to the people of entire communities. Fully aware of the logistic and technological gaps hampering the distribution of COVID-19 vaccines in Africa's most remote areas, *Drop Access* provided a straightforward, smart and effective solution, with results that couldn't be more tangible or coherent with the current emergency.

The Inspiration Continues

Even though the story we are telling today is one of success, the past year was not all fun and games, for Norah and the *Drop Access* team. The pandemic caused the shipping and equipment prices to shoot up, while Kenya's lack of technical and infrastructural support for manufacturing caused unexpected organisational and timeline setbacks.

Nonetheless, putting together strong technical skills, a bold but clear vision, a rare business acumen, and a strong will to produce an impact, Norah embodies a bright, inspiring example of empowerment. By awarding her the MGA award, RES4Africa provided a small contribution to the impact achieved.



As she acknowledges, *"Our victory in the MGA Award sparked a chain of positive reactions in our organization. It not only supported our traction developing a working prototype […] We were also enrolled into national and global accelerators, and […] other donors could see that we had been trusted by RES4Africa Foundation. Since winning the MGA, we successfully raised a follow-up funding of at least 100,000 Euros in 2021"*.

The future ahead looks bright for Norah and *Drop Access*, despite being aware of many walls still to climb over. As she tells us, "*We foresee hindrances with the policy regulations on healthcare fridges […] and a potential challenge of tax regulations and demands on local manufacturing."*. And yet, this testing circumstances are have not intimidated the team, as Norah outlines. *"The immediate goal is to launch our fridge into the market by the last quarter of 2022. This will support our ambition to eventually have our own production workshop […] for use in not only the healthcare but food and SME sectors. We plan to expand our market base to East Africa by 2023 and eventually to the rest of Africa"*.

As a non-profit Foundation, RES4Africa's impact comes not in the amount of Euros awarded. Rather the impact is measured via the number of ideas generated, and in the impetus provided to entrepreneurship able to act as a catalyst of local economic development.



KPI 2: Geographic coverage of trainings and people trained

A key indicator to understand the impact RES4Africa has had in transferring quality technical knowledge to young people and energy professionals is to look at the geographic coverage of its trainings and the expansion of the geographical focus of people trained over the years.

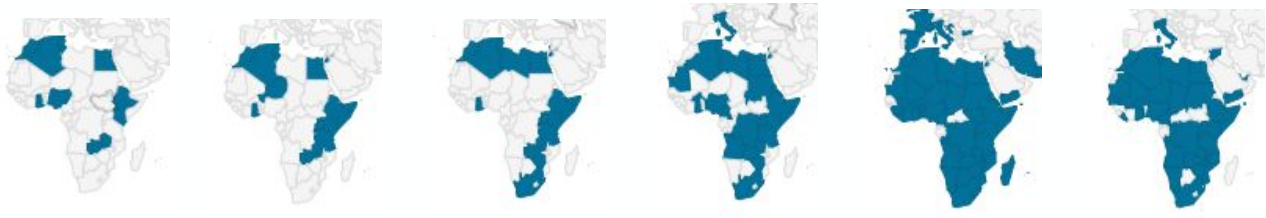
Since 2017 there has been an expansion of countries in which trainings have been held. While the ATCs are typically held annually in Milan, Italy, the Micro-Grid Academy - since its first edition - has been held in Africa. From 2018 to 2022, the MGA took place in 5 countries: Kenya, Zambia, DRC, Ethiopia and Mozambique. *The gradual expansion of countries covered by the Micro-Grid Academy demonstrates the impact the Foundation has had over the years in enabling the development of technical skills in different areas of the continent, creating a positive impact that goes beyond national borders.*

Another interesting feature is the progressive expansion of the geographical focus of participants in both ATCs and MGA. *From 2017 onwards, there has been a rapid and evident expansion of participants' countries of origin, from "just about" 9 African countries plus Italy, to almost the entire African continent.*

It is therefore evident how RES4Africa's trainings have had an increasingly important echo over the years and have succeeded in transmitting unbiased, technical and specialized knowledge to a vast audience representing different geographical areas.

The Foundation's commitment did not stop during the pandemic. Since 2020, 2 ATCs and 15 editions of the MGA have been held online, thus allowing RES4Africa to continue the work of disseminating knowledge and skills, and to expand the pool of users targeted by the courses.

Geographic evolution of MGA and ATC participants nationality over 2017-2022



Source: RES4Africa Foundation.

KPI 3: Areas of knowledge covered

The ATC, which has been running since 2014, is the Foundation's flagship and longest running capacity building programme. Since its inception it has trained 1195 people, providing to its participants multidisciplinary knowledge across the RE value chain.

The ATC course evolved over the years from a focus on large-scale renewable energy projects to cover all relevant aspects for succeeding Africa's just energy transition.

Looking into the content of each training from 2017 to 2022, what emerges is an evolution and expansion of the topics covered by ATCs. Technical issues have gradually reduced their weight to make room for other thematics such as economic-financial and regulatory ones. However, after a substantial reduction up to 2020, from 2021 onwards technical topics regained some of the lost space, to achieve a balanced programme that gives due weight to all topics concerning the energy transition. The most interesting feature is the introduction of sustainability topics from 2018 onwards, when Just Transition, Gender Inclusion and Social Equality begin to appear as part of the training agenda.

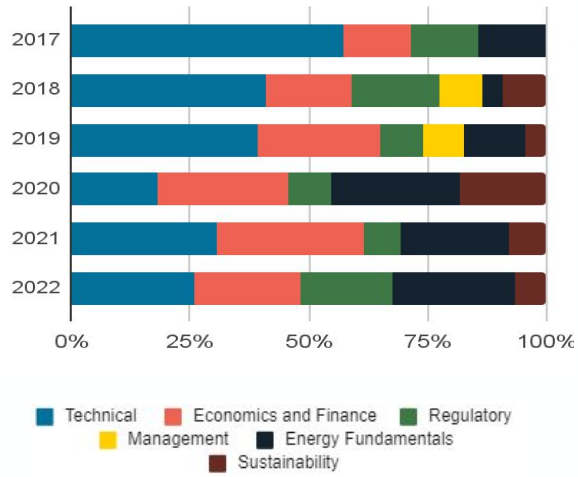
There is a clear reason for including these issues in ATCs: ensuring a secure access to energy for all and the development of renewable energy in Africa goes hand in hand with a sustainable, equitable and inclusive economic and social growth. Therefore *it is pivotal that young people, Africa's real driving force, and energy professionals have the opportunity to*



approach the issue of energy transition with a holistic approach which takes into account all perspectives.

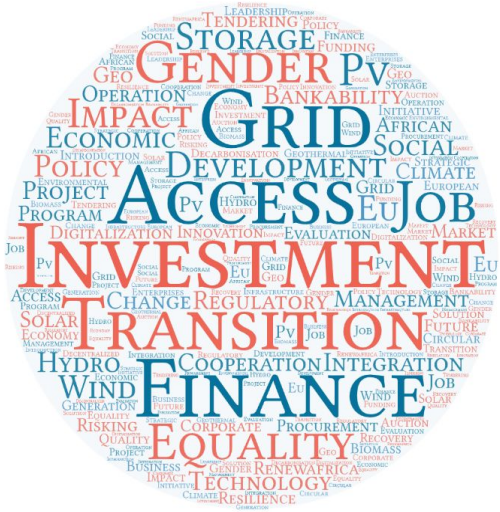
Following the trend of broadening topics of trainings, in 2018 RES4Africa identified the need to include the issue of micro-grids, which presents an important piece of the puzzle for achieving universal energy access in remote and rural areas of Africa. For this reason, as of 2018, the Foundation launched the MGA training programme which dives deeper into technical aspects of renewable energy.

Thematics evolution of ATC over 2017-2022



Source: PwC based on RES4Africa data

Most frequent words mentioned in RES4Africa's ATCs over 2017-2022



Source: PwC based on RES4Africa data



2.4

COMMUNICATION AND BUILDING SOCIAL CONSENSUS

The previous three impact areas focused on RES4Africa's role in creating content. The fourth and last impact area looks into the communication aspect, to examine how that content has generated waves and echoes in the broader public space. To what extent is RES4Africa part of the public policy conversation? Is its analytical work managing to reach its target audience? How deep and wide is its public footprint and reach? Or, to put it simply, how much resonance is RES4Africa having?

Having resonance matters not only to amplify the message, but also to incrementally build social consensus around new ideas. Only 10 years ago, renewables were an expensive, marginal technology compared to more traditional ones, but today we live in a changed world where clean energy, knowledge transfer and a just transition are needed to meet the climate challenge. In this context, Africa can play a key role, given its high potential for renewable energy development. Yet social consensus around renewable energy cannot be taken for granted, as evidenced by developments in EU countries, and a concerted effort is needed to build an evidence-based support movement.

RES4Africa's work in sparking and influencing public discussions is, in part, driving such a support movement. Its impact in doing so it measured quantitatively via the following 3 KPIs:

- Mentions in traditional media
- Communication Channels
- Social Media performance

KPI 1: Mentions in traditional media

RES4Africa Foundation has reached a wide audience thanks to a good media coverage of its studies and activities.

The analysis of media coverage and number of mentions of RES4Africa's activities and publications showed that the Foundation has been successful in getting its messages across a wide range of people, disseminating knowledge and fuelling public debate on issues within the Foundation's remit.

Media mentions of RES4Africas' activities has been growing over time

Media mentions generally increased over time from around 30 mentions in 2017 to 379 in 2022, resulting in a total of 642 mentions over the whole period under consideration.

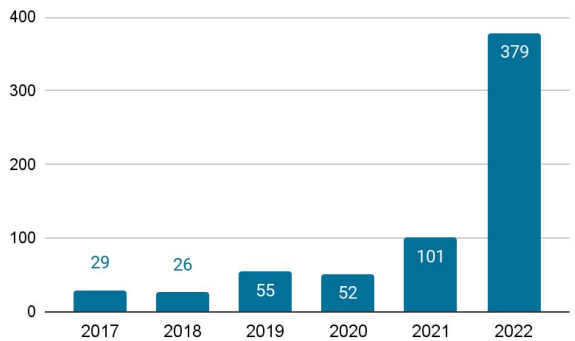
Media that have mentioned RES4Africa's activities, reports and studies target different audiences

Analysing the number of mentions per each media, PwC identified 4 different target audiences:

- Industry (Energy)
- Policy and Geopolitics
- General Public
- Economic - Financial

Although the largest number of mentions were found in media outlets with a predominantly specialised audience (technical and policy), RES4Africa's work also received good media coverage in those media aimed at a general audience, thus succeeding in spreading its messages to a larger public and shaping the public debate.

RES4Africa's media mentions over 2017-2022



Source: PwC based on web analytics



Key Figures (2017-2022)

642 Mentions in online media

>360 Media outlets

RES4Africa's activities and studies have been mentioned in many African and European online newspapers. Below are some of the media outlets that have cited the Foundation's work the most.

Who is talking about RES4Africa? 5 media outlets

Africa e Affari — Rivista mensile sul continente del futuro

ESI AFRICA

ETHIOPIA Semonegna

Afrik 21

الوحدة AL WIHDA

Source: PwC based on web analytics



KPI 2: Communication Channels

Digital communication has enabled direct dialogue with audiences worldwide who use online platforms as a way not only to access information, but also to engage on relevant issues.

Key RES4Africa communication channels over 2017-2022

Members Brief	Newsletter	Articles	Website
>200 recipients	>13.000 subscribers	74 articles 94 press releases 80 editorials	308 K visits*

Source: RES4Africa. *Website statistics and Members Brief figure only apply for the year 2022.

Communication tools

RES4africa ensures a continuous dialogue between public and private actors in Europe and Africa, connecting stakeholders, institutions and organisations in the energy sector.
It uses a variety of communication tools to deliver the right message to the right audience:

- *Members Briefs* are bi-weekly and used to inform its members about the activities of the Secretariat, upcoming events and relevant opportunities.
- *Newsletters* are monthly and sent to a wider audience including the network and subscribers
- *Articles* which are the result of positive relationships established with different media and are published either in print or digital media
- New user-friendly *Website*, created in 2021, where all information is available and free of charge, facilitating information sharing among stakeholders.

Between 2017 and 2022, the pool of recipients grew across all communication channels, allowing the Foundation to disseminate quality information to thousands of users, thus helping to influence public opinion on renewable energy sources in the African continent.

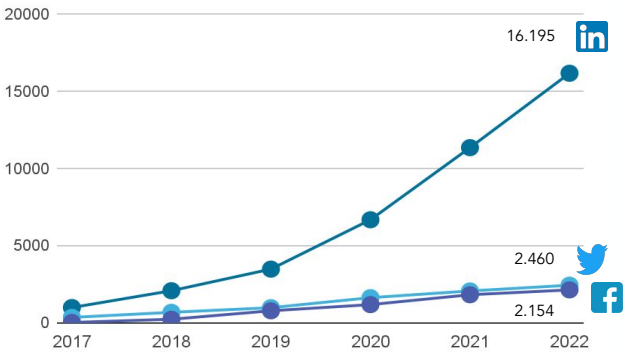
KPI 3: Social Media Performance

Between 2017 and 2022, RES4Africa strengthened its position on social media to reach a younger, more engaged audience

Res4Africa has always been committed to nurturing a continuous communication channel, on different topics and with different formats suited to reach a wide and, above all, diverse audience.
For this reason, and given the broader need for amplifying the message, the *RES4Africa communication team has been striving to consolidate RES4Africa's positioning on social media with a particular focus on Linkedin, Facebook and Twitter.*

This increased effort has enabled the Foundation to engage an ever-wider audience and increase the engagement of the youth population, a key linchpin of the energy transition in Africa.

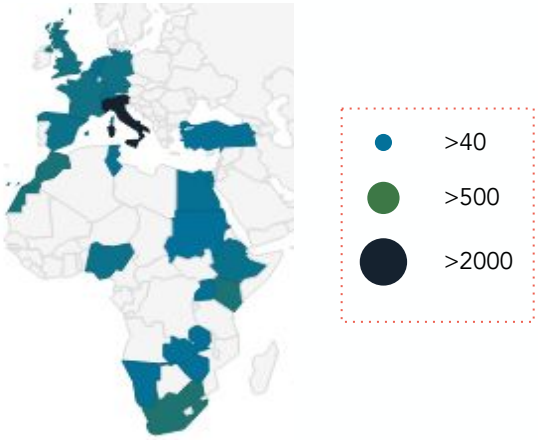
RES4Africa's social media over 2017-2022



Source: RES4Africa Foundation

Stakeholder engagement through the use of social media has grown over the years. LinkedIn followers grew steadily to reach over 16 000 followers. This network remains the single most important social media platform for the Foundation, reflecting its strong orientation to an audience of young professionals who are the platform's most frequent users. Twitter's followers also grew steadily, to reach 2460 in 2022. Facebook posts received around 2000 likes in 2022.

RES4Africa's social media followers demographics by Country (2021-2022)



Source: RES4Africa. The social media included here are Facebook, Linkedin and Twitter

In line with the Foundation's target audience, most of RES4Africa's followers on Linkedin, Facebook and Twitter come from Europe and Africa.

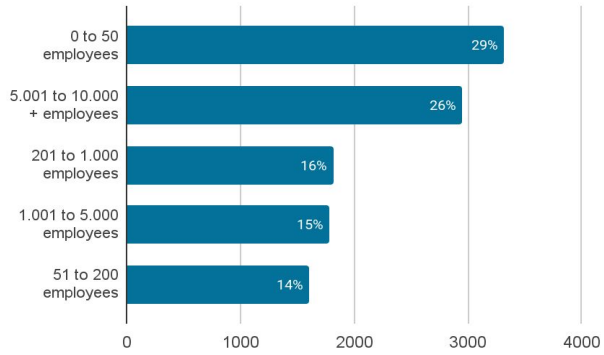
The single country from which the largest number of followers comes from is Italy, but a high level of engagement is also evident in sub-Saharan Africa, consistent with the expansion of the Foundation's scope of work that started in 2017.

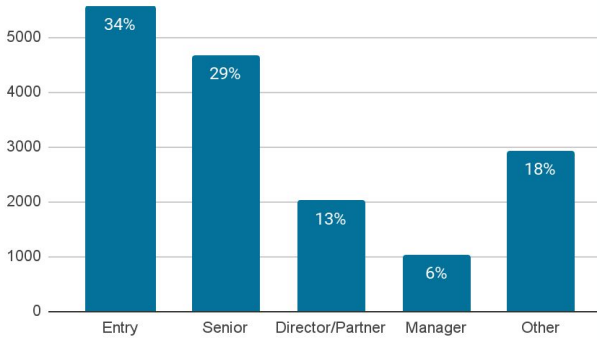
The expansion of the Foundation's areas of work and geographical focus has therefore been followed by an engagement of the local population through social media. This is an important indicator of impact, as social media following helps shape public opinion and convey RES4Africa's messages to a broad network of supporters.



A look at Linkedin Analytics provides a broader picture of the Foundation's audience. Looking at the company size and seniority level of followers, what emerges is that RES4Africa is able to speak to a broad and diverse audience, from Europe to Africa, from small to medium and large companies, as well as people of all seniority levels, from trainee to CXOs.

Linkedin's followers demographics by Company Size and Seniority (2022)





Source: RES4Africa Foundation

The growth in RES4Africa's social media community is partly attributable to the Foundation's conscious effort to evolve and expand both tools and content of its communications. During the last years the communication team strengthened its presence on two important channels: Instagram and YouTube. Both have seen major interest, with Youtube standing out thanks in no small part to the video content being created regularly.

When it comes to the content itself, there has been a shift from merely providing updates on the Foundation's activities , appointments and opportunities to a more engaged and extensive type of communication, based on disseminating information, ideas and knowledge through specific communication campaigns, which aim both to enhance the Foundation's studies and to engage members. Following this approach, RES4Africa's new communication strategy has created a network effect, characterized not by a one-way communication from the Foundation to the public, but rather an open space to communicate with the public. An example of this change is the growing involvement of Members in content creation through, for example, editorials and video interviews. Stakeholders are therefore not passive members of the Foundation's network; instead they are proactive agents and partners in the dissemination of RES4Africa's ideas and mission.



RES4Africa's social media in 2022

Instagram followers

549

YouTube views

17.097

Source: RES4Africa Foundation



3 Conclusions

To achieve its goal of accelerating Africa's energy transition and transformation, the RES4Africa Foundation engages in a series of analytical activities based on the power of ideas. To measure the impact of ideas, the approach used was to identify impact areas based on the Foundation's mission, strategic positioning and activities. For each impact area, 3 KPIs were identified through which RES4Africa's performance could be measured. A thorough data collection and analysis was then carried out to measure the impact. Below are the four impact areas and the main results obtained.

Impact areas and results

Influencing the political conversation: in what is arguably RES4Africa's most important area of impact, we observed a strong growth in both the production of analytical content and the echo that this content generated in the wider public space.

Events and attendance at events have grown, demonstrating RES4Africa's ability to reach and engage stakeholders and to speak to a variety of countries to embrace and spread its messages. The broader the audience, the wider RES4Africa's voice is being heard.

Networking and stakeholder engagement: RES4Africa has successfully built a broad and diverse network of stakeholders.

The Foundation has significantly expanded its membership, its partner base and its geographical composition. As of 2022, the Foundation has a network of members and partners from 17 countries in Europe and Africa.

Capacity building and knowledge transfer: RES4Africa has trained thousands of renewable energy enthusiasts ready to promote green policies and be part of Africa's just energy transition.

Almost 3,000 people from 65 countries have participated in the training courses, with an increasing number of young people and women.

Communication and social consensus building: RES4Africa expanded its communication tools and strengthened its position on social media to reach a wider and more engaged audience.

RES4Africa's work was mentioned over 600 times by some 300 media outlets. A new communication strategy was introduced that expanded the communication tools to engage a wider and younger audience. Instagram, Facebook, Twitter and LinkedIn followers increased significantly.

Knowing the progress of past activities is a useful tool to strategically plan future activities and to achieve the goal of energy transition in Africa, fostering an environment suitable for new investments and new technologies for clean and renewable energy.

In conclusion, we witness a progressive improvement in all impact areas considered. This study provides an analytical, data-driven approach which can be repeated periodically to continue measuring impact and achievements of the Foundation's work to accelerate the energy transition in Africa. An additional step in the continuation of this work could be to associate quantifiable targets to the KPIs used in this study with a view to continuous monitoring and improvement of results.

About

RES4Africa Foundation

Born in 2012, RES4Africa (Renewable Energy Solutions for Africa) is a Foundation that works to support Africa's just energy transition. Its mission is to work towards creating favorable conditions for scaling up investments in clean energy technologies on the continent.

Functioning as a bridge between Europe and Africa, RES4Africa envisions the sustainable transformation of the continent's electricity systems to provide reliable and affordable electricity access, and enabling job creation and socio-economic progress for all African businesses and societies.



PwC

PwC is a network of firms in 155 countries with over 284,000 people committed to delivering quality in assurance, advisory and tax services. With its global strategy, The New Equation, PwC is responding to the challenges shaping the world today, with a focus on building trust and delivering sustained outcomes that create value for organisations, their stakeholders and broader society. Climate change is one of the world's most pressing problems, and PwC has committed to reach net zero greenhouse gas emissions by 2030 and is working with organisations to accelerate their own climate-based transformation. This report has been realized with the contribution of the ESG – Climate Change team of the PwC Italy firm, who have an expertise in renewables de-risking and have assisted a range of national and supra-national policy makers with identifying and addressing barriers to RES investments.

PwC Italy is a founding member of the RES4Africa Foundation. Together with a network of industry and services partners, we are committed to promoting a sustainable energy transition in Africa and globally. Find out more at: https://www.pwc.com/it/it/industries/energy-utilities.html



pwc

RES4AFRICA FOUNDATION

This document has been prepared as an independent analysis of RES4Africa Foundation and PwC. We accept no liability (including for negligence) in connection with this document. The quotation, abridgement or reproduction of this work is permitted under condition that the original source is quoted.

© 2022 PricewaterhouseCoopers. All rights reserved. In this document "PwC" refers to the ESG - Climate Change practice of the Italian member firm, and may sometimes refer to the PwC network. Each member firm is a separate legal entity. Please see www.pwc.com/structure for further details.