UPDATE ON THE SE4ALL HIGH IMPACT OPPORTUNITY:
UNIVERSAL ADOPTION OF CLEAN COOKING SOLUTIONS
(Note by the Global Alliance for Clean Cookstoves on behalf of the HIO Universal Adoption of Clean Cooking Solutions)

Meeting of the Advisory Board
on 19 May 2015, New York

This note is an update of the HIO Universal Adoption of Clean Cooking Solutions. It outlines objectives and key activities and deliverables. It describes the Strategic Plan and the steps needed to achieve its objectives and to mobilize commitments.

This note is for information.
SE4ALL HIO UNIVERSAL ADOPTION OF CLEAN COOKING SOLUTIONS

Context and objectives

The use of open fires and traditional cookstoves and fuels is one of the world's most pressing health and environmental problems. Globally, three billion people rely on solid fuels to cook, causing serious environmental and health impacts that disproportionately affect women and children. According to the World Health Organization, household air pollution from cooking kills 4.3 million people every year and sickens millions more. Yet, safe, affordable, and accessible clean cooking solutions exist that can dramatically reduce fuel consumption and exposure to harmful cookstove smoke, while providing economic opportunities in communities around the world.

The Global Alliance for Clean Cookstoves (Alliance) is at the forefront of efforts to promote the adoption of clean cooking solutions and spur universal adoption of clean cookstoves and fuels. Launched in September 2010, the Alliance has a 10-year goal to foster the adoption of clean cookstoves and fuels in 100 million households by 2020 toward universal adoption of clean cooking solutions by 2030. The Alliance, on behalf of the Universal Adoption of Clean Cooking Solutions HIO, is working to support Sustainable Energy for All’s objectives by improving access to modern energy services for those who lack clean and efficient cookstoves and fuels. Toward this goal, the Alliance and its 1100 global partners are working to establish a thriving global market for clean cooking solutions by addressing the market barriers that impede the production, deployment, and use of clean cookstoves and fuels.

Alliance Launches Phase 2 of Strategic Plan to Build the Sector

In 2011, the Alliance released a comprehensive sector strategy in its groundbreaking report *Igniting Change: A Strategy for Universal Adoption of Clean Cookstoves and Fuels*. The subsequent Alliance three-phase strategic business plan provided a strategic roadmap for the creation of a dynamic market for clean cooking solutions. The Alliance made enormous progress in Phase I of the initiative and has worked with many SEFA partners under the HIO to surpass many of its original goals. To date, more than 20 million additional cleaner and more efficient cookstoves are in use and global awareness of the serious issues posed by household air pollution is growing rapidly.

While Phase 1 of the Alliance was dedicated to building global and in-country markets for clean cookstoves and fuels, Phase 2, launched at the November 2014 *Cookstoves Future Summit*, will focus on driving investments, innovation, and operations to scale these markets and enable 60 million households to adopt cleaner cooking solutions by 2017 toward a 2020 goal of 100 million households.

Building on Momentum from Phase 1 Achievements

The Alliance’s Phase 2 goals will build from the solid foundation of achievements the Alliance accomplished in Phase 1, which include:

- Growth from 19 partners to 1,100 global partners, including 50 national governments, 12 UN agencies, global corporations, hundreds of small- and medium-sized enterprises, foundations, investors, researchers, women’s groups, and scores of non-governmental organizations.
Launch of a suite of Country Action Plans to build momentum among government leaders in Bangladesh, China, Ghana, Guatemala, India, Kenya, Nigeria and Uganda.

- $50 million in grant funding for activities in the sector that have enabled a stronger market and another $50 million in investment into the sector at large.

- Establishment of the Boost Accelerator, Spark Fund, Women’s Empowerment Fund, Pilot Innovation Fund, and Working Capital Fund to support the development of commercially viable enterprises and encourage innovations in clean cookstoves and fuels.

- Led the International Organization of Standardization (ISO) process to create the first-ever international guidelines for cookstove safety, efficiency and cleanliness.

- Support for 13 regional testing and knowledge centers (RTKCs) across Africa, Asia, and Latin America and coordinated training and staff development to provide high quality testing services.

- Raise global awareness of HAP issue through 100+ global, national, and local media outlets

- Support for research in child survival, climate change, fuels, gender impacts, and adoption.

- Commission 19 market assessments and 5 consumer segmentation studies.

- Creation of several high-impact resource guides and web portals including the Clean Cooking Catalog, Gender Online Knowledge Hub, Partner Country Toolkit, and Carbon Finance Platform.

Focus on Scale in Phase 2

The HIO, led by the Alliance, will continue to leverage the reach and depth of the sector to achieve a thriving global market for clean cookstoves and fuels at scale. In addition, Phase 2 (2015-2017) marks a significant shift towards demand creation, while continuing work to strengthen supply and foster an enabling environment. The Alliance will also continue support for research on the needs and preferences of consumers, and use this information to launch consumer-facing awareness campaigns to increase awareness of household air pollution and drive demand for and adoption of cleaner cooking solutions.

The Alliance will also work to make cleaner solutions more affordable by brokering partnerships with financial institutions and facilitating guarantees and new consumer financing products and delivery models. And the Alliance will work with SE4All partners to increase accessibility of clean stoves and fuels by strengthening existing last-mile distribution channels and leveraging new ones through pilots, capacity-building for enterprises, and sharing of best practices. The Alliance will continue to work under the HIO to drive financing and direct enterprise capacity building, with support mechanisms ranging from early stage grant funding, through subsidized capital, to angel equity, and ultimately commercial capital.

Support for improved stove and fuel performance will also continue via the Alliance’s leadership in the ongoing ISO process to establish standards for the sector to ensure that technologies achieve the desired benefits for health, livelihoods, and environment. The Alliance will also ramp up efforts to roll out certification and labeling in our focus countries to ensure adherence to global standards and allow consumers to make informed choices. Finally, the Alliance will continue to serve as a convener and knowledge hub for the sector, and has recently launched a new website with expanded resources and information for HIO partners. Preparations are now underway for the 2015 Biennial Forum in Ghana, a country that has publically prioritized clean cookstoves and fuels in its SE4All strategic plan.

Steps to Meet HIO Objectives and Mobilize Commitments

The Cookstoves Future Summit marked the first time that the international community of clean cooking supporters convened publically around a common goal – to mobilize resources for and awareness of the
clean cooking sector. More than 75 representatives from implementing and donor countries, UN agencies, investment institutions, corporations, research institutions, and NGOs made $413 million in formal commitments to the sector to provide grant, financial, and in-kind resources for program implementation during Phase 2 of the Alliance’s Strategic Roadmap (2015-2017). These commitments are expected to be deployed over the next three years to support enterprise capacity building, investment in market-based solutions, research, standards and testing, advocacy, consumer marketing, humanitarian outreach, and women’s empowerment. Implementing countries were also well represented at the Summit, pledging more than $250 million in commitments for in-country programs and policy implementation. While these commitments are impressive for the fledgling clean cooking sector long ignored by donors, the challenge remains to convert Summit pledges into cash flow for the sector to achieve impact.

Annex 1: Phase 1 report
A MESSAGE FROM
RADHA MUTHIAH
EXECUTIVE DIRECTOR OF THE GLOBAL ALLIANCE FOR CLEAN COOKSTOVES

Dear Friends,

Four years ago, when Hillary Rodham Clinton announced the launch of the Global Alliance for Clean Cookstoves, I remember thinking, “This is it. This is the issue and the approach that will galvanize women and girls around the world.” She spoke movingly of the fact that, for 3 billion people who depend on open fires, the simple act of boiling a pot of water, making a meal or trying to heat a home carries a lethal health risk. The Alliance would bring together women’s groups and entrepreneurs, governments and corporations, foundations and investors in a global effort to save lives, empower women and protect the environment by creating a thriving market for clean cookstoves and fuels. The goal was ambitious and the vision of a public-private partnership to create the change was pioneering.

Four years later, as the Executive Director of the Global Alliance for Clean Cookstoves, I can report that this optimism proved prescient. In just four years, the Alliance has mobilized a thousand partners who are working together to address this silent killer. It has championed policy decisions that will enable and accelerate the clean cookstoves and fuels market. It is working with the International Organization for Standardization to create a set of standards that will help us deliver quality, effective, and independently tested products. It has driven $50 million in grant funding and $50 million in private investment into the sector. Most important of all, the Alliance is raising the awareness of millions of men and women who, in their very purchasing decisions, have the ability to solve the problem of household air pollution. With the desire, access, and means to own a wide variety of cleaner cooking technologies and fuels, our target audiences are becoming informed customers, not hapless victims.

I’m proud of the amazing progress the Alliance has made, and as Phase 1 of our Strategic Business Plan comes to a close, I am thrilled to report that today there are at least 20 million households using cleaner and more efficient cookstoves and fuels. This growth reflects the commitment of our partners, our organization’s focus, our donors’ generosity, our investors’ faith and of course burgeoning consumer demand. As we move into Phase 2 of our strategic plan, we will build on that momentum. The Alliance’s goal is to enable 60 million households to adopt clean cooking solutions by 2020.* Working together we can save lives, improve livelihoods, empower women and protect the environment.

*and the good news is we are already ahead of schedule.

Speed, flexibility and smart strategies are essential if we are to combat this global killer. We encourage you to deepen your commitment to the sector in 2015 and redouble your efforts to accelerate the market for cleaner cookstoves and fuels. Working together we will improve public health, empower women and girls, and protect our environment. It’s an investment that promises lifesaving returns and it will pay dividends for decades to come.

Radha Muthiah
REAL CHANGE, REAL GROWTH, REAL MARKETS

Highlights of Alliance Achievements 2010-2014

In 2011, the Alliance released a comprehensive sector strategy in its groundbreaking report Igniting Change: A Strategy for Universal Adoption of Clean Cookstoves and Fuels. The subsequent Alliance strategic business plan, structured in three phases, provides a clear roadmap for the creation of a dynamic market for clean cooking solutions. As Phase 1 of the plan draws to a close, the Alliance has made tremendous progress and, thanks to the energy and commitment of its partners, it has surpassed many of its original goals. Here, in brief, are just a few of the Alliance’s major achievements to date.

The Alliance has commissioned research to identify barriers across the clean fuel supply chain, supported capacity building of clean fuel enterprises, increased the number of investors and resources to support scale and adoption in priority markets, and developed mechanisms to share best practices. The Alliance has welcomed global corporations, investors, financial institutions and hundreds of entrepreneurs and enterprises looking to build capacity, scale up production, and improve their products. Researchers across several disciplines, including climate, gender, public health, and policy đánh are incorporating cookstoves and fuels elements into their equations. Beyond looking at biomass, improving access to—and affordability of—electricity, LPG, ethanol, methanol, biogas and solar is central to its work. In Phase 1, the Alliance has also partnered with Social Capital Markets (SOCAP) to give scholarships for clean cooking entrepreneurs to attend its annual conference. In addition, it works with SOCAP to offer networking and matchmaking opportunities for all audiences.

The Alliance is gathering tremendous momentum in its focus countries of Bangladesh, China, Ghana, Guatemala, India, Kenya, Nigeria and Uganda. Government leaders have built clean cooking solutions into their health, energy and environment policies, and stakeholders have worked closely with the Alliance to develop and execute comprehensive Country Action Plans. The Alliance has helped local distribution channels and strengthened the capacity of entrepreneurs to produce higher quality stoves and fuels in greater quantities. As each country works to address its unique challenges and opportunities, the Alliance has also expanded and enriched its base of knowledge on the sector and has shared it with a wider audience. The Alliance’s 6th Biennial Clean Cooking Forum in Phnom Penh, Cambodia in 2013 convened 500 participants from 60 countries and was the largest gathering to date of sector stakeholders.

The Alliance held a training workshop by 40 staff members from 16 countries of the U.S. Environmental Protection Agency’s Cookstoves Testing Facility. The Alliance, in collaboration with national standards committees and relevant organizations from 23 countries, has supported International Organization of Standardization Technical Committee 285 (ISO TC285), the first standards for cleaner and more efficient cookstoves and clean cooking solutions. The Alliance is also increasing local capacity in design innovation and testing by supporting 13 Regional Testing and Knowledge Centers (RTKCs) across Africa, Asia, and Latin America, and coordinating knowledge training and staff development within a broader network of RTKCs.

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The Department for International Development (DFID), the Alliance Secretariat’s largest bilateral donor, won “Best Initiative by a Government Body” at the 2014 Climate Week Awards. DFID was recognized for its efforts to support innovation, market development, and research in the clean cooking sector. DFID funding has been instrumental in the Alliance’s research, gender, and humanitarian programming.

Launched with just 19 members in 2010, the Global Alliance for Clean Cookstoves now includes more than 1,000 active partners. Together they represent a network that can provide all the resources necessary to create a thriving global market for clean cookstoves and fuels. To date, the broad reach and depth of the Alliance has helped spur the adoption of more than 20 million cleaner and more efficient cookstoves and fuels, which represents huge progress in the goal to deploy clean cooking solutions in 100 million households by 2020. The Alliance is proud of the incredible progress made by its global suite of partners and is thrilled to celebrate their incredible success.

### 1,000 Partners Strong

**PARTNERS BY CATEGORY**

|--------------|-------------------------------|----------------|----------------|-----------------------------|--------------------------------|-----------------------------------|------------------------|-------------------|

The Swiss Tropical Institute of Public Health and Capianto University in Peru are working with the Alliance to identify the key attributes that influence the acceptance and adoption of cleaner, more efficient and safer cooking products in rural Andean populations of Peru. The study will examine cooking-related practices and preferences, showcase risk perceptions, and highlight how household decisions are made. The study will also map existing improved cookstove (ICS) interventions along with national and regional policies associated with ICS promotion.

**EnviroFitt Development**

Envirot International, a cookstove manufacturer, and EVAK, a community development and training institution, are working in partnership with Johns Hopkins Bloomberg School of Public Health to conduct gender research in Kenya. The research will examine the impact that women entrepreneurs can have on the adoption and sustained use of clean cooking solutions.

**Eco-Fuel Africa**

CEO Sanga Moses was named one of National Geographic’s 2014 Emerging Explorers. The start-ups were recognized for making discoveries, making a difference, and inspiring people to care about the planet.

**The World Health Organization**

and the Alliance are working together to develop and accelerate the release of new indoor air quality guidelines for household air pollution. The guidelines, which cover cooking, heating, and lighting, will allow government officials and others involved in policy development to better understand the relationship between levels of exposure to household air pollution and their devastating health outcomes. The guidelines can be used by governments and ministries both to promote clean cookstoves and fuels programs and as a scientific basis for legally enforceable standards.

**Project Gaia**

A U.S.-based NGO working to create a thriving market for alcohol-based fuels and stoves, has scaled up its operations in Ethiopian refugee camps, installed the first microdistillery for ethanol cooking fuel in Addis Ababa, collab- orated on maternal health research in Nigeria and conducted mini-pilot studies in Asia and Central America. They are currently working on launching a new innovative stove model with Domestic and commercializing programs in Ethiopia, Nigeria, and Haiti. The Alliance continues to be a leader in the global clean cookstove sector for over ten years, and whose work was instrumental in creating the Alliance in 2010.

**ClimateCare**

ClimateCare, a leader in both the climate and development sectors, has unlocked private sector finance to distribute clean cookstoves to more than 750,000 families throughout the developing world.

**The United States Government**

is one of the largest bilateral contributors to the sector. Eleven of its government agencies, more than any other country, are lending their expertise on research, testing, and market development to ensure the Alliance meets its goals.

**Calvert Foundation**

is launching the next round of their Women Investing in Women fund, WIN–WIN 2.0, with the Alliance. The focus of the $20 million fund will be to empower women by scaling access to clean energy products, including clean cookstoves and fuels.

**Professor Tami Bond**

one of the world’s leading experts in the study of indoor and outdoor air pollution, is collaborating with Johns Hopkins Bloomberg School of Public Health as it conducts research on improving air quality in homes and communities. She is also leading a global research initiative to understand the relationship between household air pollution and the impact on public health.

**Deutsche Bank**

The Alliance and Deutsche Bank hosted an Investor Roundtable in New York. Representatives from major banks, financial institutions, and impact investment funds discussed the capital needs of the sector, as well as methods for scaling and structuring investment in clean cooking solutions.
SNV Netherlands Development Organisation, a founding partner of the Alliance, has implemented biogas projects in 20 countries, and clean cookstove and fuel projects in 16 countries across Asia, Africa, and Latin America. It is also leading research studies in concert with the Alliance, to better understand and document innovative distribution models for clean cooking solutions.

The Xunda Science & Technology Group Co. Ltd., a leading Chinese manufacturer and exporter of gas and biomass stoves, attributes the popularity of its products to the company’s investment in technology and innovation. The company reports that it owns more than 200 patents and in 2013, it sold 80,000 improved stoves in China, Guatemala, India, Fiji, Yemen, Bangladesh and several other countries.

Support from Norway, a founding partner of the Alliance, has been instrumental in the formation of country level alliances and the development of country action plans in focus countries. Leveraging their longstanding support for global efforts to improve energy access, Norway has been a leader in driving innovation in programs and policies to reach and include the base of the pyramid.

Greenway Appliances, a Pilot Innovation Fund and Spark Fund grantee, has created an innovative partnership with ESAF Retail and ESAF Micro Finance and Investments to distribute clean biomass stoves. ESAF has access to 434,000 members through its 150 branches and its loan officers have agreed to demonstrate Greenway stoves and take customers’ orders. The results have been promising. In three months, Greenway sold a record 50,000 stoves to members of local women’s financial self-help groups.

The Alliance granted Nokooda Solution Systems the Innovation in Clean Cooking Award at the Sankalp Un-convention Summit in 2014. Nokooda processes biomass waste from public parks and turns it into pellet fuels, which are sold in Delhi, India. In addition to diverting tons of waste from landfills in India, the company creates ‘enviropreneurs’ who earn an income from waste processing or from selling the pellets. Nokooda will use the $15,000 prize to help develop an innovative cookstove with continuous refueling capabilities.

Jita Bangladesh, a joint venture of CARE Enterprise Inc. and Danone Communities, is dedicated to empowering women and underserved communities by improving their access to products that promote good health. CEO Rashid Shaikh Saif Al, who was recently named one of the Schwab Foundation’s Social Entrepreneurs of the Year, reports that Jita is currently reaching 2 million consumers with its unique “last mile” sales and distribution model and hopes to increase that reach to 7 million consumers in the near future. Jita saleswomen are known as Aparajita, or women “who never accept defeat.”

THE UNITED NATIONS HIGH COMMISSIONER FOR REFUGEES is working closely with the Alliance to ensure that millions of displaced people will have regular and reliable access to fuel and energy without threat to their lives or personal safety. With an initial focus on energy needs for cooking and lighting in refugee camps, SAFE (Safe Access to Fuel and Energy) is a cross-sectoral issue that must be addressed in order to reduce the many risks associated with the collection and use of firewood for cooking.

2013 Pilot Innovation Fund winner UpEnergy, a company that helps market and distribute efficient stoves in Uganda, was recognized by Fast Company magazine as one of the Top 10 Most Innovative Companies in Africa.

Solar Cookers International held a three-day conference in Sacramento, CA in July 2014. The conference brought together project directors, promoters, designers and researchers from 16 countries to discuss recent advancements in solar cooking, obstacles to adoption, solar cooker testing standards, and a number of other critical topics.

THE CHARCOAL PROJECT is a nonprofit that promotes biomass fuel alternatives and clean combustion technologies. It is collaborating with the Massachusetts Institute of Technology’s D-Lab on The Harvest Fuel Initiative. The Initiative’s technical team is currently performing comprehensive evaluations of green briquettes, wood-derived charcoal, and firewood at Lawrence Berkeley National Lab to help enterprises understand how fuel quality influences customer satisfaction.

The Alliance’s health research portfolio is enriched by productive partnerships with the National Institutes of Health and with the US Centers for Disease Control and Prevention. Their input and guidance have enabled the Alliance to leverage resources, share expertise, and maintain the highest standards of policy-relevant investigation as we work to demonstrate the many benefits of clean cooking solutions.
GETTING TO KNOW OUR 3 BILLION CONSUMERS

Through a combination of 19 market assessments, three major customer segmentation studies, over 100 site visits, and extensive data analysis, we understand more about the clean cookstove and fuels customer than ever before.

Every smart business enterprise knows that consumer needs and desires drive purchasing decisions, and the customer is at the heart of the Alliance’s work. Its consumer-centric sensibility is the starting point from which everything else follows. It is not enough that the Alliance helps stimulate the supply of clean cooking solutions. To produce cookstoves and fuels consistently, and are affordable, some consumers see clean cookstoves and fuels as a status symbol. In Bangladesh researchers found that many women are interested in adopting new products because it increases their social standing.

The Alliance partners include several prestigious research institutes and their studies have revealed some common perceptions that cross cultural and geographic boundaries. We know that a cookstove’s size, ease of use, durability, and portability are critical attributes. Stoves which marry into dough, cookstoves maintains into dough, cookstoves carry cooking can help empower women.

Research is critical to the success of this mission and in the last three years the Alliance has conducted market assessments in 19 countries. Information gleaned from this data, combined with research from Alliance partners, is readily available on the website cleancooking.org. The assessments provide partners with essential insights into preferences, price points, and usage patterns and also offer a snapshot of a customer’s access to new technologies and financing. The customer segmentation research provides even richer detail. It supports researchers who make home visits and watch women prepare their daily meals, noting the types of pots and ingredients used. In Bangladesh, for example, women will often make one huge pot of rice which will be used for every meal. It is no surprise then that a recent WASHplus study found that consumers want stoves that are powerful enough to boil water quickly and big enough to hold large pots. In West Africa, where women spend a third of their day in the kitchen.

Fast Fact

In Ghana the quality of materials is one of the strongest drivers of consumer satisfaction. Consumers are attracted to high-quality metals such as stainless steel or cast iron. Electric induction stoves, which can boil water faster than electric solar or gas stoves, are making inroads in India.

In Bangladesh, women in rural areas can spend up to a bound in adopting new products. If it takes longer to cook on an improved or efficient stove, a user will quickly return to their familiar cooking practices or use an improved cookstove along with a traditional

FAST FACT

One cookstove marketed in Nigeria was renamed the Fast Fire because consumers like products that cook food quickly.

Meet The Chef Corps

One of the ways the Alliance is raising awareness of the risks of indoor air pollution is through its Chef Corps. Meet four chefs who are using their fame to promote clean cooking solutions.

Jose Andres

Spanish-American chef José Andrés is an internationally-recognized culinary innovator, passionate advocate for economic and social empowerment and founder of World Central Kitchen, a nonprofit which seeks to find sustainable solutions to food insecurity and malnutrition.

Susan Kamau

Kenya’s most celebrated chef, Susan Kamau, is the founder of Kenyan Kitchen, a magazine, website and TV show. Her passion for home-cooked food and ability to connect with citizens from every demographic make Susan a powerful spokeswoman for the Alliance.

Sanjeev Kapoor

Indian restaurateur Sanjeev Kapoor runs a successful TV channel, has won many culinary awards, and is the author of several bestselling cookbooks. He believes that the act of cooking can help empower women.

Luu Meng

Luu Meng is Cambodia’s most recognizable chef. He is the president of the Cambodia Hotel Association and is co-author of the book Cambodia’s Top Tables.

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ALLIANCE FOCUS COUNTRIES AT A GLANCE

65% of annual deaths attributed to household air pollution occur in these eight countries.

**GUATEMALA**
- 70% of population relies on solid fuels
- 9.6 million people affected by household air pollution
- 5,200 deaths per year

**NIGERIA**
- 75% of population relies on solid fuels
- 127 million people affected by household air pollution
- 70,000 deaths per year

**UGANDA**
- 97% of population relies on solid fuels
- 35 million people affected by household air pollution
- 13,400 deaths per year

**BANGLADESH**
- 89% of population relies on solid fuels
- 138 million people affected by household air pollution
- 78,000 deaths per year

**CHINA**
- 45% of population relies on solid fuels
- 608 million people affected by household air pollution
- 1.04 million deaths per year

**INDIA**
- 63% of population relies on solid fuels
- 780 million people affected by household air pollution
- 1.02 million deaths per year

**KENYA**
- 84% of population relies on solid fuels
- 21 million people affected by household air pollution
- 13,400 deaths per year

**GHANA**
- 84% of population relies on solid fuels
- 36 million people affected by household air pollution
- 14,300 deaths per year

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GUATEMALA

Seventy percent of households in Guatemala use firewood and charcoal as their primary source of energy. Better fuels have the potential to reduce indoor air pollution and improve health outcomes for millions. However, the market for clean cookstoves and fuels in Guatemala is nascent, and there is significant potential for market growth with government and donor support. In August 2014, the Ministry of Energy and Mines, in partnership with UNACC, the Ministry of Health, and the Ministry of Education, launched the Second National Fuelwood Demand Survey. The study is the first national survey to quantify the demand for fuelwood and serves as a data source for the design of a demand-reduction strategy. In the medium term, the Ministry of Energy and Mines aims to make clean cookstoves affordable for all Guatemalan households by implementing programs to decrease fuelwood demand and increase access to clean fuels and technologies.

GHANA

In 2012, the Alliance played a key role in launching a National Action Plan for Clean Cooking, which is an effort to reduce indoor air pollution and improve environmental health outcomes. In July 2014, the Ghana Clean Cookstoves Action Plan was formally launched at a national conference in Accra. The Action Plan was developed by the Ghana Clean Cookstove Action Team (GCCAT), which is a partnership among the Ministry of Food and Agriculture, the Ministry of Health, the Ministry of Energy and Minerals Resources, private companies, NGOs, research institutions, and community organizations. The Action Plan includes a set of strategies to increase access to clean cookstoves and fuels in Ghana, reduce indoor air pollution, and improve health outcomes. The Action Plan was developed with the support of the Alliance, which has provided technical assistance and funding. In addition, the Alliance has supported work to increase awareness of the importance of clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns.

UGANDA

In 2012, the Alliance was working closely with the Uganda National Alliance on Clean Cooking (UNACC) and the Ministry of Energy to increase the use of clean cookstoves and fuels in Uganda. The Alliance has supported the UNACC to develop a National Action Plan focused on increasing access to clean cookstoves and fuels. The Action Plan includes strategies to increase awareness of the benefits of clean cookstoves and fuels, to support local businesses and entrepreneurs in producing and selling clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns. The Action Plan was developed with the support of the Alliance, which has provided technical assistance and funding. In addition, the Alliance has supported work to increase awareness of the importance of clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns.

KENYA

The Kenya Kenya Clean Cookstove Action Team (KCCAT) has made significant progress in increasing access to clean cookstoves in Kenya. In 2014, the KCCAT launched the Kenya Clean Cookstove Action Plan, which includes strategies to increase access to clean cookstoves and fuels, to support local businesses and entrepreneurs in producing and selling clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns. The Action Plan was developed with the support of the Alliance, which has provided technical assistance and funding. In addition, the Alliance has supported work to increase awareness of the importance of clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns.

INDIA

In 2014, the Ministry of New and Renewable Energy (MNRE) announced the National Mission on Clean Cookstoves (NMCC), which aims to increase access to clean cookstoves and fuels in India. The MNRE has set a target of reaching 17.5 million households by 2020, and 100 million households by 2025. The Mission has awarded 231 grants to support the development and dissemination of clean cookstoves and fuels. In addition, the MNRE has launched the Clean Energy Access Network (CEAN) to support the development and dissemination of clean cookstoves and fuels. The CEAN has awarded 15 grants to support the development and dissemination of clean cookstoves and fuels. The CEAN has also supported work to increase awareness of the importance of clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns.

CHINA

In 2014, the Ministry of Science and Technology awarded grants to support the development and dissemination of clean cookstoves and fuels in China. The Ministry has set a target of reaching 17.5 million households by 2020, and 100 million households by 2025. The Ministry has awarded 231 grants to support the development and dissemination of clean cookstoves and fuels. The Ministry has also supported work to increase awareness of the importance of clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns.

BANGLADESH

In 2014, the Ministry of Power, Energy and Mineral Resources awarded grants to support the development and dissemination of clean cookstoves and fuels in Bangladesh. The Ministry has set a target of reaching 17.5 million households by 2020, and 100 million households by 2025. The Ministry has awarded 231 grants to support the development and dissemination of clean cookstoves and fuels. The Ministry has also supported work to increase awareness of the importance of clean cookstoves and fuels, and to promote the use of clean cookstoves and fuels through consumer education and marketing campaigns.
DRIVING INVESTMENT, STRENGTHENING ENTERPRISES, ENCOURAGING INNOVATION

The Alliance is using grants and other forms of soft and patient capital to prepare a pipeline of new opportunities for investors. To date, $50 million of private capital has flowed in to the sector to support the growth of enterprises along the cookstoves and fuels value chain. In fact, the Alliance is currently leveraging a dollar of investment funding for every dollar of grant funding. Access to finance is key to scaling up a sustainable supply of cleaner and more efficient cookstoves and fuels and the Alliance has worked with investors to stimulate their engagement in the sector. It has also focused on developing a suite of financial products to bridge the “pioneer gap” and to strengthen enterprises to the point of investment readiness. The Alliance’s Pilot Innovation Fund finances creative approaches to business development and the Spark Fund provides capacity building and growth capital so that a business can become more investment ready. The Women’s Empowerment Fund provides grants to partners who offer gender and empowerment interventions within their business models. All three funds have attracted a stellar range of applicants who prove that there is no shortage of entrepreneurial talent in this market.

THE SPARK FUND
The Spark Fund invests grant capital in established but underfunded enterprises that have the ability to reach financial viability and scale. The first round of Spark grantees in 2013 included Burn Manufacturing, EzyLife Kenya, Greenway Appliances, Impact Carbon and Relief International. Six grants totaling $2.2 million were awarded under the second round of funding in 2014. The winners, chosen from more than 70 applicants, are profiled here:

SimGas is a biogas producer and manufacturing company focused on distribution in the East African market. The company’s briquettes are made from compressed recycled charcoal and charcoal husks.

Sustainable Green Fuel Enterprises produces and sells clean burning, sustainable charcoal briquettes to low-income households in Phnom Penh, Cambodia. The company’s briquettes are made from compressed recycled charcoal and charred coconut husks.

Greenway Appliances designs and distributes efficient biomass cookstoves for rural families. The company’s flagship product, Greenway Smart Stove, is sold in 24 districts in India and one district in Bangladesh.

EcoFuel Africa produces green charcoal from biomass waste. Based in Uganda, EFA employs local farmers, leverages local technology, and counts 200 women retailers in its value chain.

EcoZoom has sold thousands of improved cookstoves in 18 countries. With its launch in Kenya, EcoZoom will expand its operations to include design, manufacturing, and direct distribution of wood and charcoal-fueled cookstoves.

SMEFunds is an ethanol gel manufacturing and distribution company focused on distribution in Nigeria. It has developed a method of producing cellulose ethanol and converting the liquid into gel that can then be used in their cookstoves, which is manufactured in China. SMEFunds has a distribution structure similar to that used by Ayu Products and employers individuals to sell the product at a margin throughout Nigeria.

THE PILOT INNOVATION FUND
This year marked the second round of the Pilot Innovation Fund (PIF), which was established to spur innovation and finance game-changing ideas. The winners of the first round of the PIF in 2013 were UpEnergy, Potential Energy, Greenway Appliances, Solar Sister, Sustainable Green Fuel Enterprise and Improved Cook Stoves for East Africa Ltd. Two first round PIF grantees—Greenway Appliances and Sustainable Green Fuel Enterprise—have gone on to become Spark Fund grantees, supporting the Alliance’s hypothesis that the PIF creates a pipeline of innovative enterprises with the potential to scale. In 2014, six PIF winners shared $400,000 to support their work.

Applied Sunshine LLC is a startup that has developed an innovative vacuum tube solar cooker to be marketed in Guatemala. This tube can cook various types of foods, including local staples such as tortillas.

Prakti Design will develop a two-burner, multi-fuel stove for Bangladeshi, Indian, and Nepalese markets. The firm hopes to quickly achieve economies
of scale with this innovative product.

**Emerging Cooking Solutions (ECS)** manufactures and distributes pellets made from agro- and forestry waste in Zambia. ECS will market several lower-priced stoves for use with their pellets and look at several options for consumer financing.

Rahimafrooz Renewable Energy Ltd is a solar home systems distributor in Bangladesh. Rahimafrooz will test several different cookstoves and develop their plan to expand into the clean cooking market.

**CleanStar Ventures** will develop an ethanol stove with a refillable fuel cartridge, complementary household appliances that can use ethanol, and a fuel distribution process that leverages partnerships with multinational corporations in Kenya.

C-Quest Capital (CQC) is a private equity and carbon finance firm providing clean and efficient household energy technologies and sustainable sources of household cooking fuels. Through TLC Green, a joint venture between CQC and the Malawian NGO Total Land Care, CQC proposes to test a new business model to couple the marketing and sale of sustainable firewood with improved cookstoves.

**Women’s Empowerment Fund**

In 2014, the Alliance issued its first six Women’s Empowerment Fund (WEF) grants to organizations that are implementing gender and empowerment interventions within their clean cooking business models. The following Alliance grantees will test and further develop the best practices highlighted in the resources guide *Scaling Adoption of Clean Cooking Solutions Through Women’s Empowerment*.

Envirofit will examine how targeted empowerment and leadership training for women entrepreneurs in Kenya can impact their capacity to educate and support customers and scale adoption of clean cooking technologies.

Fuego del Sol will provide female school cooks with improved institutional stoves and train them in clean cooking techniques and maintenance, as well as support clean cooking entrepreneurs. Fuego del Sol will also work with the cooks to create central distribution hubs in Haiti for household cookstoves and briquettes.

Mercy Corps will analyze affordability and financing barriers for women purchasing improved cookstoves in Uganda. They will design and test a portfolio of consumer financing mechanisms and determine which combinations have the greatest potential to scale clean cookstove adoption.

**The Paradigm Project** will apply its gender-sensitive approach to the EzyAgent program in Kenya by facilitating the recruitment of women as clean cookstove employees. Paradigm will seek to identify the primary characteristics, traits and skills that successful female EzyAgents share, as well as understand the conditions of success for female entrepreneurs in the clean cookstove value chain.

Grassroots Trading Network for Women will develop a toolkit for a hand-held electronic device that can be used to collect data to better understand Indian consumers’ willingness to pay for clean cooking technologies. The device will also be used to show consumers the savings benefits they can achieve with improved cookstoves.

**Carbon Finance**

A clean cookstove can save 1 to 2 tons of carbon dioxide (CO2) emissions per year and some clean cooking solutions save considerably more. These CO2 emission reductions can be certified and sold through global carbon markets generating an additional source of revenue for stove businesses. The Alliance’s Carbon Finance Platform provides how-to guides, tools, templates, reports, case studies and other tools to assist stakeholders with varying levels of carbon expertise.

**More News on Clean Fuels**

The Alliance is “fuel neutral” because it recognizes that the 3 billion people around the world who rely on biomass for fuel and heating do not have equal access—in terms of supply or affordability—to cleaner fuels. It must also be flexible in its approach since the policy contexts, barriers, and facilitators of market expansions in cleaner fuels and stoves are unique to each market. The Alliance’s Phase 3 strategy has therefore focused on understanding the most appropriate cleaner fuel options for each region or country and outlining the steps needed to increase consumer access to that option.

In Ghana, the Alliance will assist the government as it seeks to transition 50 percent of the population to LPG as their primary cooking fuel. Partnering with experts in the LPG field, the Alliance has helped develop an action plan to identify the investments in supply, storage, distribution, retail, and consumer finance required to accelerate the adoption of LPG domestically.

In Nigeria, the Spark Fund is helping a local ethanol gel enterprise reach commercial viability and scale. The Alliance is also convening East African briquette producers and distributors to better understand the barriers that have kept them from penetrating rural markets.

In India, populations in several states have access to commercial and high pressure LPG stoves. The Alliance is “fuel neutral” because it recognizes that extending the fuel supply chains to rural areas for both LPG and electric induction stoves is unique to each market. The Alliance’s Phase 3 strategy has therefore focused on understanding the most appropriate cleaner fuel options for each region or country and outlining the steps needed to increase consumer access to that option.

In Phase 3, the Alliance will perform a global analysis of different fuel supply chains to identify impacts and barriers, strengthen the case for investors, and identify successful initiatives.

**The Equation is Clear:** Clean fuels plus cleaner burning stoves equals more lives saved and real progress towards our Phase 2 goal of 60 million households adopting clean cooking solutions by 2017.
The Importance of Building the Evidence Base

Research studies create a compelling case for global action.

In order to reach its goal to spur adoption of clean cookstoves and fuels in 100 million households by 2020, the Alliance must both demonstrate that clean cookstoves and fuels as a public health intervention remains low. Yet we know that electricity and clean fuels including ethanol, solar and LPG, have the ability to reduce exposures to household air pollution to levels that provide health impacts. New more advanced stoves have overcome some of the technical challenges associated with earlier versions of improved biomass stoves and also promise benefits.

The Alliance believes that by providing governments, NGOs, impact investors, and donors with scientifically based information on the benefits of clean cooking technologies, it can help them quantify the impact of their investments in the sector. The Alliance set out to build this evidence base, and over the last four years, has helped direct almost $5 million in research grants to the sector and supported 39 studies across 23 countries. These studies show clean cooking solutions not only protect public health, but also offer clear environmental, gender and economic benefits.

The Alliance has formed a Research Advisory Committee (RAC), which includes distinguished research experts in health, energy, standards and testing, environment, gender and economics. Its committee members support the Alliance research team and provide oversight to ensure that its research priorities are comprehensive, balanced and globally representative. RAC members also support the review and issuance of research grants and help determine which investments will most effectively demonstrate the impact of clean cooking interventions.

The Alliance has also strengthened research on the causes and risk factors for severe burns, which contribute to 195,000 deaths annually. While a large proportion of these are thought to be cooking-related, there is limited data on the direct causes and risk factors for severe burns. To address this data gap, the Alliance, WHO, CDC, and a global network of public health experts have developed a new Global Burn Registry Form so that data collection on burns can be globally harmonized. The form has now been pilot tested in 46 hospitals within 26 countries.

Health Research

In Phase 1, the Alliance supported three child survival research studies in Ghana, Nigeria, and Nepal. Those studies explore how the adoption of clean cooking during pregnancy can impact pregnancy outcomes including birth weight. The study addresses a range of clean cooking technologies, including biomass stoves, ethanol, and LPG. Preliminary results are clear: Adoption of cleaner cookstoves and fuels delivers substantial reductions in exposure to household air pollution. The Alliance has also strengthened research on the causes and risk factors for severe burns, which contribute to 195,000 deaths annually. While a large proportion of these are thought to be cooking-related, there is limited data on the direct causes and risk factors for severe burns. To address this data gap, the Alliance, WHO, CDC, and a global network of public health experts have developed a new Global Burn Registry Form so that data collection on burns can be globally harmonized. The form has now been pilot tested in 46 hospitals within 26 countries.

Climate Research

Large-scale adoption of clean cookstoves and fuels as a public health intervention remains low. Yet we know that electricity and clean fuels including ethanol, solar and LPG, have the ability to reduce exposures to household air pollution to levels that provide health impacts. New more advanced stoves have overcome some of the technical challenges associated with earlier versions of improved biomass stoves and also promise benefits.

The Alliance is continually attracting new researchers from different disciplines to the sector and to maximize the effectiveness of its work, it has created a Research Platform to standardize, synthesize, coordinate, and share those studies with the sector, donors, and other researchers. The Platform also makes the results more accessible and understandable to other stakeholders and it drives innovation by showcasing improvements in stove design, new materials, and factors that influence adoption.

Household Air Pollution Intervention Tool

Policy makers, donors, NGOs and researchers now have access to a simple web-based tool that can compare the impacts of various cooking technologies on health at the national level. With the Household Air Pollution Intervention Tool (HAPIT), users can compare the lifesaving impact of available interventions and make evidence-based decisions. HAPIT was developed at the University of California, Berkeley, with support from the Alliance and funding from the UK’s Department for International Development and Environment Canada.
THE GROWING IMPACT OF GLOBAL STANDARDS AND TESTING

One of the Alliance’s key value propositions is its work to lead the development of standards and testing in the clean cooking community. From its engagement in the ground-breaking 2012 International Standards Organization (ISO) International Workshop Agreement, to its work in 2013 with ISO Technical Committee 285 on clean cookstoves and clean cooking solutions, the Alliance has played a strong leadership role. The development of consensus standards is essential if the Alliance is to drive health and environmental gains. Common standards provide a set of indicators against which to rigorously measure the performance of a technology. And ratings, based on data gathered during a consistent and independent testing process, are a valuable benchmark for stakeholders across the sector.

5 REASONS WHY ISO STANDARDS ARE CRITICAL

1 FOR CONSUMERS
   Expert, independent evaluation of a cookstove’s performance informs, protects, and empowers consumers. With a reliable source of information, buyers can distinguish hype from fact and choose a cookstove based on the performance metrics that best suit their needs. Some consumers prioritize reduced emissions while others seek fuel efficiency. A stove’s durability and safety are also important to some consumers.

2 FOR MANUFACTURERS
   Standards will allow manufacturers to differentiate their products in the marketplace. They can be used as independent verification of a stove’s quality and performance. Standards also encourage product innovation because the tiered rating system provides a roadmap for product excellence.

3 FOR DONORS AND IMPACT INVESTORS
   Guidelines give clear, comparable information on the potential for different enterprises and their technologies and products to have an impact on the environment and health.

4 FOR PRIVATE INVESTORS
   Financial institutions and others looking to maximize their return on investment will be able to distinguish companies with the most impressive products and greatest potential.

5 FOR GOVERNMENTS AND REGULATORS
   The guidelines can both protect citizens and help measure progress towards clean cookstove and fuel adoption, as well as broader renewable energy and health goals.
ROADMAP FOR PHASE 2

The Alliance’s strategic plan includes a goal for 60 million households to adopt cleaner and more efficient cookstoves and fuels by 2017. These strategies will raise awareness to create that demand, bring smart products and ideas to market, build the evidence base for clean cookstoves and fuels, and fully engage impact investors. Working with its partners, and following this action plan, the Alliance will make great progress towards defeating this silent killer.

**2015**

- **20 MILLION HOUSEHOLDS ADOPT CLEANER AND MORE EFFICIENT COOKSTOVES AND FUELS.**
  - We are already ahead of our Phase 1 target.
  - Work with at least three financial institutions in each focus country to support consumer finance and develop products that will enable families to move up the energy ladder.

- **Increase efforts to drive private investment in the sector and encourage financial institutions to allocate capital for clean cookstoves and fuels enterprises.**

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

- **Build a strong global network for evaluation of research.**

- **Launch public awareness campaigns in all eight focus countries. National and local champions drive home our messaging.**

- **Promote certification, labeling, and testing programs in accordance with ISO standards.**

2017

- **60 MILLION HOUSEHOLDS ADOPT CLEANER AND MORE EFFICIENT COOKSTOVES AND FUELS.**
  - The global health community will fully embrace and act on the issue of household air pollution.

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

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

- **Continue to develop a pipeline of investment-ready enterprises through the spark, pilot innovation, and women’s empowerment funds.**

- **CO2 emissions saved**
  - 310 million metric tons

- **Trees saved**
  - 430,000

- **Children’s lives saved**
  - 25,000

- **Lives saved**
  - 110,000

- **Sector jobs**
  - 350 million
The Global Alliance for Clean Cookstoves is grateful for the generous financial and in-kind support of our donors

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The Global Alliance for Clean Cookstoves is a public-private partnership hosted by the United Nations Foundation that seeks to save lives, improve livelihoods, empower women, and protect the environment by creating a thriving global market for clean and efficient household cooking solutions. The Alliance’s 100 by ’20 goal calls for 100 million households to adopt cleaner and more efficient cookstoves and fuels by 2020. The Alliance is working with its public, private and non-profit partners to help overcome the market barriers that currently impede the production, deployment, and use of clean cookstoves and fuels in developing countries.