GOGLA

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SAPVIA Universal Access Working Group

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Public policy decides the market

- Public policy is a key factor in establishing market opportunity and size
- Policies determine product eligibility, tax cost, and procurement access
- Standards affect market entry, returns, and brand risk
- Policy intelligence helps companies plan

MISSION 300 · 30 NATIONAL ENERGY COMPACTS REVIEWED

From declaration to delivery

WHAT THE COMPACTS DECLARE

45%

of new connections by 2030 expected from off-grid solar and DRE

Solar home systems, productive use solar and mini-grids appear across most of the compacts.

FULL COMPACT ANALYSIS

gogla.org/mission300

WHAT DELIVERY STILL NEEDS

Funded targets	Only a handful of governments turned off-grid ambition into budget
Contracted instruments	Fewer still reached an instrument with a confirmed market response
Disaggregated targets	Aggregating across technologies hides standalone solar from planning
Affordability design	Subsidy structure and end-user affordability left under-specified

MISSION 300 COMPACTS IN THE REGION

What separates delivery from intention

COUNTRY	ACCESS 2030 TARGET	OFF-GRID SOLAR ROLE	WHAT TO TAKE FROM IT
Malawi	26% → 70%	6.4m of 11.8m connections; ~USD 300m	Ngwee Ngwee Ngwee Fund gave the market a working RBF instrument; ASCENT is the next test
Botswana	77% → 100%	~200,000 people; USD 160m	Dedicated Off-Grid Solar Fund plus national SHS and mini-grid standards
Lesotho	53% → 100%	~130,000 people, mostly SHS	National Energy Fund, PAYGo and RBF mechanisms, MTF-based monitoring
Tanzania	46% → 75%	Not specified	Focused on grid connections and clean cooking; many of the sector's real barriers not addressed

NATIONAL PLANNING

OGS in national energy plans

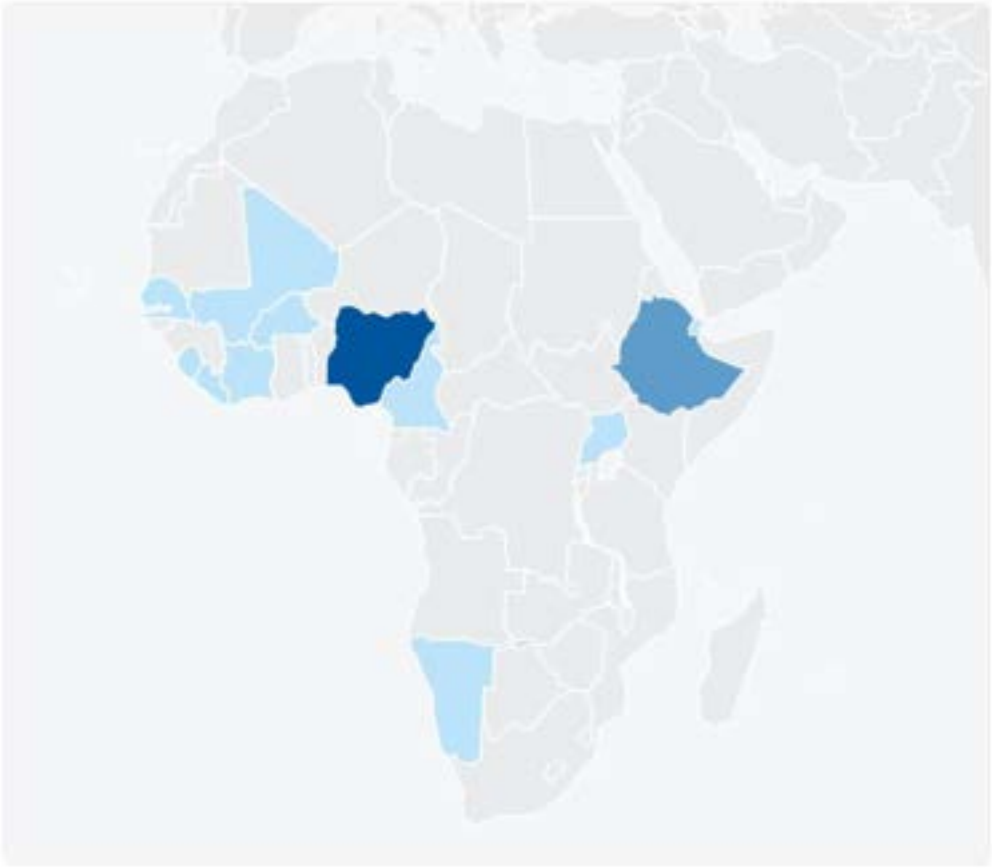
Several African countries have **explicitly integrated off-grid solar (OGS) and DRE** into national electrification plans, energy strategies, or regulatory roadmaps:

Kenya, Uganda, Ethiopia	OGS included in national electrification and energy planning frameworks
Benin, Ghana, Senegal, Togo	OGS and mini-grids embedded in rural electrification strategies
Kenya, Rwanda, Ethiopia, Uganda	Adopted or actively advancing productive use of renewable energy (PURE) in national energy strategies and roadmaps

Driving affordability

Fiscal incentives and supportive policy measures are critical to creating an **enabling environment for the off-grid sector**, reducing costs and de-risking investment.

- **Import duty & VAT exemptions**
  Burkina Faso, Cameroon, Ethiopia, Liberia, Sierra Leone, Nigeria
- **Reduced VAT rates**
  Côte d'Ivoire, Mali
- **Tax incentives / investment allowances**
  Senegal, Nigeria
- **Subsidies / concessional finance**
  Namibia, Djibouti
- **RBF / OBF frameworks**
  Nigeria, Uganda, Ethiopia



HOW MANY OF THE FIVE MEASURES A COUNTRY HAS IN PLACE

One Two Three

IEC ADOPTION

Quality & standards

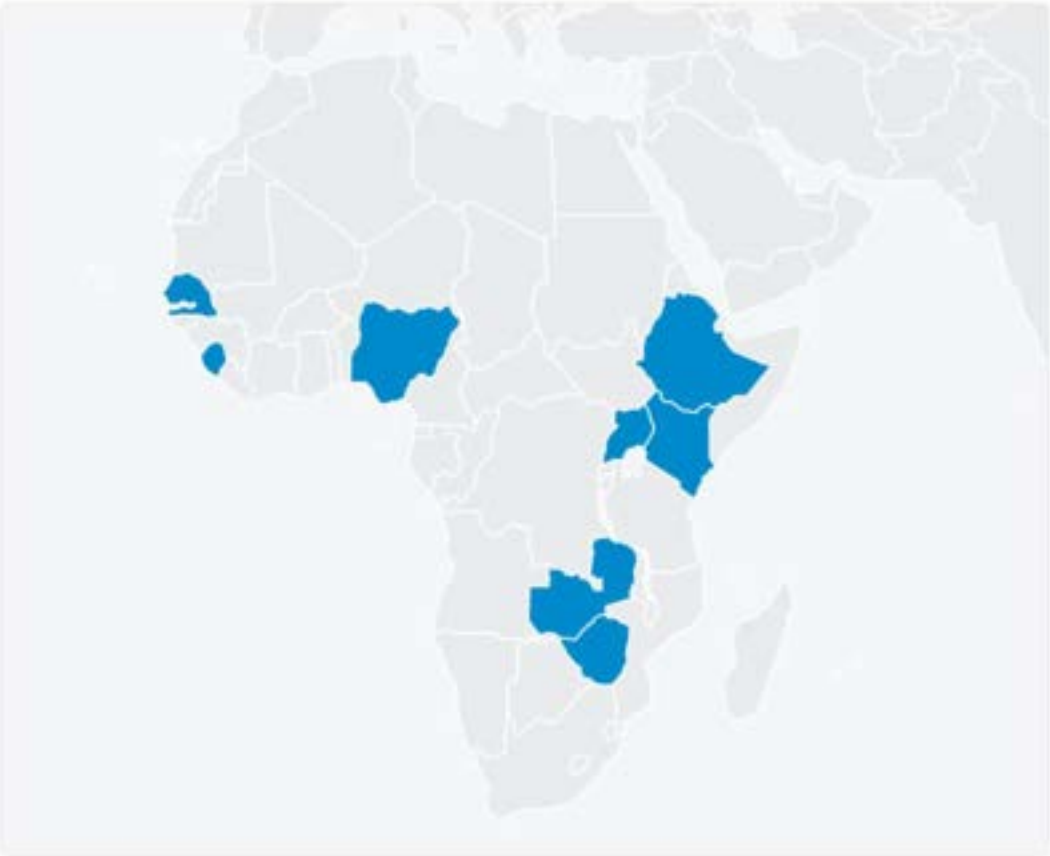
IEC standards are adopted to ensure **off-grid solar products are safe, reliable, and durable**, giving consumers confidence and supporting a high-quality market.

Increasingly required for

- Donor-funded procurement
- National subsidy and RBF programmes

Non-compliant products risk

- Exclusion from tenders
- Brand damage
- Increased enforcement at borders



IEC standards adopted: Ethiopia, Kenya, Nigeria, Senegal, Sierra Leone, Uganda, Zambia, Zimbabwe

Country case studies

Madagascar, Nigeria and Kenya:
How programme design and advocacy
shaped market outcomes.

SOUTH AFRICA

Off-grid solar enters the national electrification programme

Government is incorporating off-grid solar and distributed renewable energy into the Integrated National Electrification Programme (INEP), guided by three priorities: programme coherence, legal and fiscal sustainability, and coordination with municipalities.

1.6m

households still without electricity

75–80%

of unconnected households are rural, where grid extension is not cost-effective

12

months to turn technical plans into policy and financing frameworks

Concerns raised on programme design

GOGLA

1 Tender launched on bulk procurement and a giveaway programme, to distribute portable SHS kits to the poorest and most vulnerable communities

2 Private sector actors raised concerns on beneficiary selection, technical specifications, market risks and aftersales support

3 GOGLA made a formal submission to UNOPS and the government of Madagascar

4 In response, the government drafted a plan of action articulating how the programme would be implemented

BUSINESS TAKEAWAY

Bulk procurement rewards manufacturers aligned with specs and volumes.

WORLD BANK OUTPUT-BASED FUND · NIGERIA

Verified outputs, delayed payments

GOGLA

1	Launch of the Output-Based Fund (OBF), implemented by the Nigeria Electrification Project (NEP) & DARES
2	Provides grants to solar service providers and developers based on verified outputs
3	Complex verification process caused delayed payments and administrative bottlenecks
4	Through GOGLA's intervention, including a consultation with the participating companies, partial payments were secured

BUSINESS TAKEAWAY

Public finance programmes create demand but require strict compliance.

Tax exemptions retained after industry advocacy

1 Finance Bill 2025 submitted to Parliament in April 2025

2 Analysis of the Bill identified the removal of tax exemptions for OGS

3 Members briefed and a petition to Parliament prepared

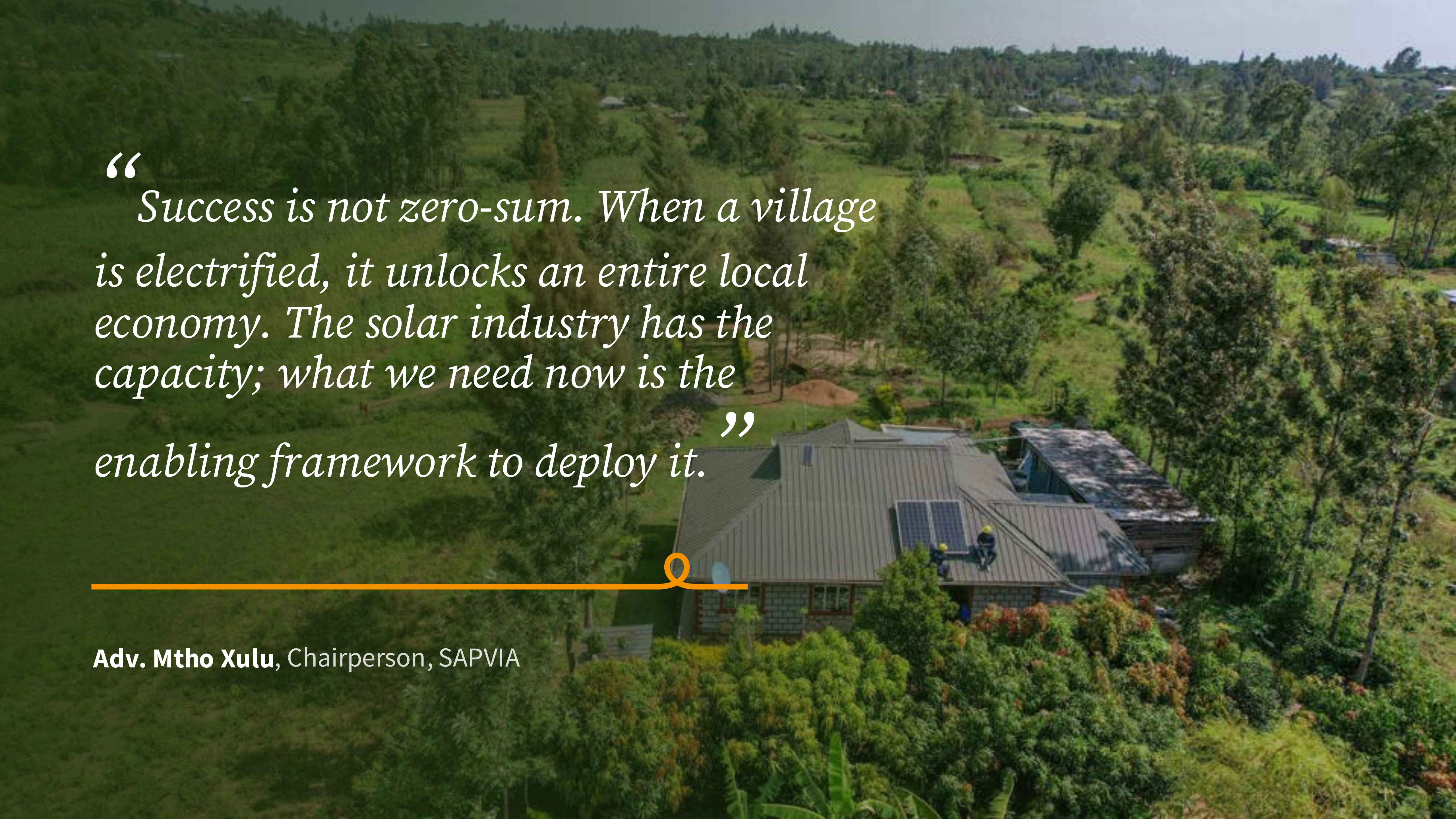
4 Public participation — petition presented to the Finance & National Planning Committee (FNCP) and MPs engaged

5 FNCP report agrees with the OGS industry petition; Parliament passes the report

6 **Finance Act 2025** — assented into law with OGS tax exemptions retained

BUSINESS TAKEAWAY

Advocacy can directly protect product affordability and margins.



> *"Success is not zero-sum. When a village is electrified, it unlocks an entire local economy. The solar industry has the capacity; what we need now is the enabling framework to deploy it."*

Adv. Mtho Xulu, Chairperson, SAPVIA

GOGLA

Thank you

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Policy & Regional Representation

Dedicated to creating an environment where the off-grid industry can expand electricity access and drive economic growth. Through advocacy on national, regional, and international levels, GOGLA promotes best practices, supports policy development, and champions the role of off-grid solutions in achieving global goals.

- Have your say on key topics such as **End-User Subsidies** and **Productive Use of Energy** through our Working Groups
- Participate in the dialogue with the **Community of Champions**, representing policymakers whose priority is energy access
- Leverage our Regional Representatives to work on issues that affect your business like **Import Duties and VAT exemption**

Why Public Policy Matters to Manufacturers

- Public policy is a key factor in establishing market opportunity and size
- Policies determine product eligibility, tax cost, and procurement access
- Standards affect market entry, returns, and brand risk
- GOGLA helps companies anticipate changes before they happen

OGS in National Energy Plans

Several African countries have **explicitly integrated off-grid solar (OGS) and DRE** into national electrification plans, energy strategies, or regulatory roadmaps:

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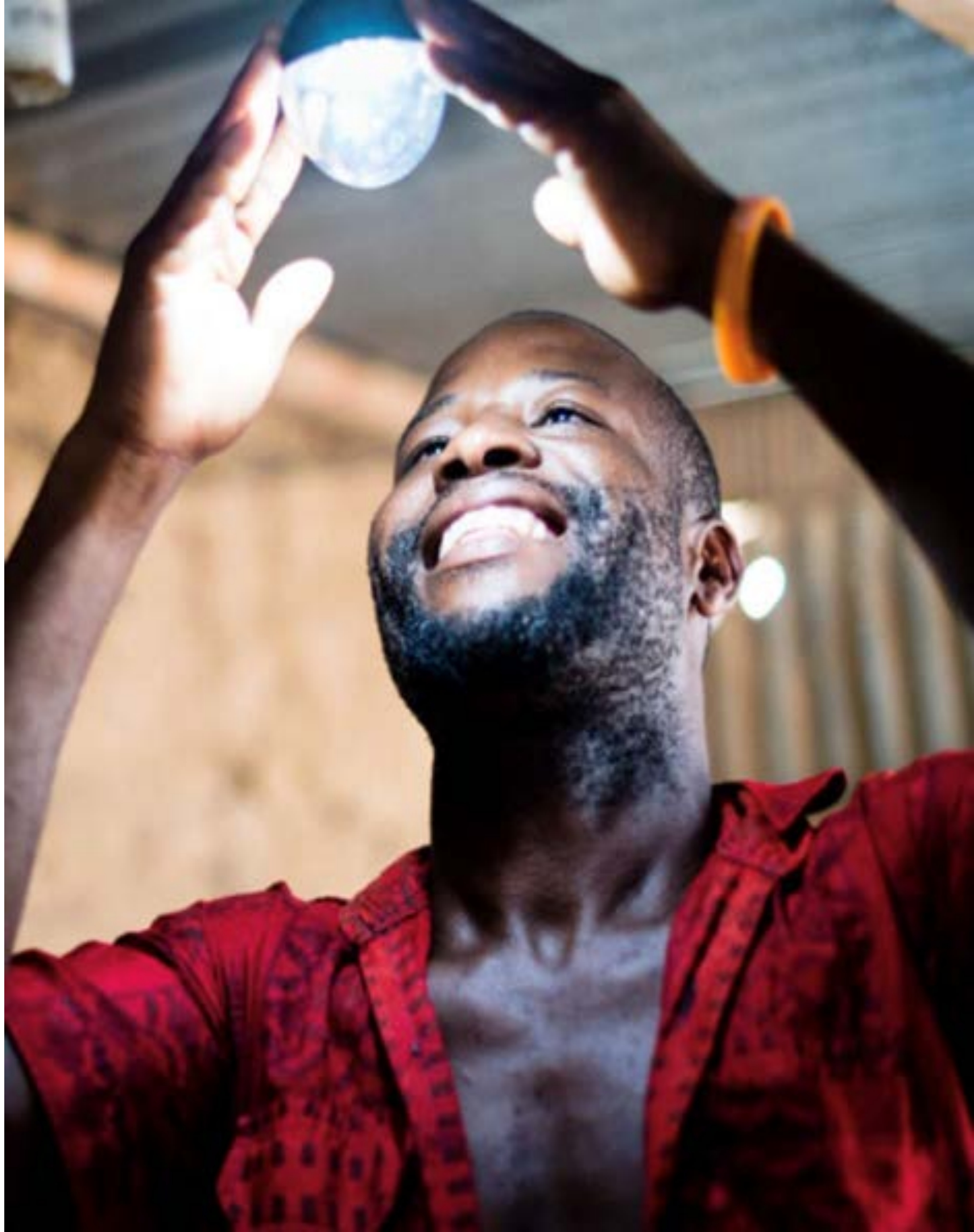
Driving Affordability
Fiscal incentives and policy measures

Fiscal incentives and supportive policy measures are critical to creating an **enabling environment for the off-grid sector**, reducing costs, de-risking investment, and enabling sustainable private sector participation at scale.

- **Import duty & VAT exemptions:** Burkina Faso, Cameroon, Ethiopia, Liberia, Sierra Leone, Nigeria
- **Reduced VAT rates:** Côte d'Ivoire, Mali
- **Tax incentives / investment allowances:** Senegal, Nigeria
- **Subsidies / concessional finance:** Namibia, Djibouti
- **RBF / OBF frameworks:** Nigeria, Uganda, Ethiopia



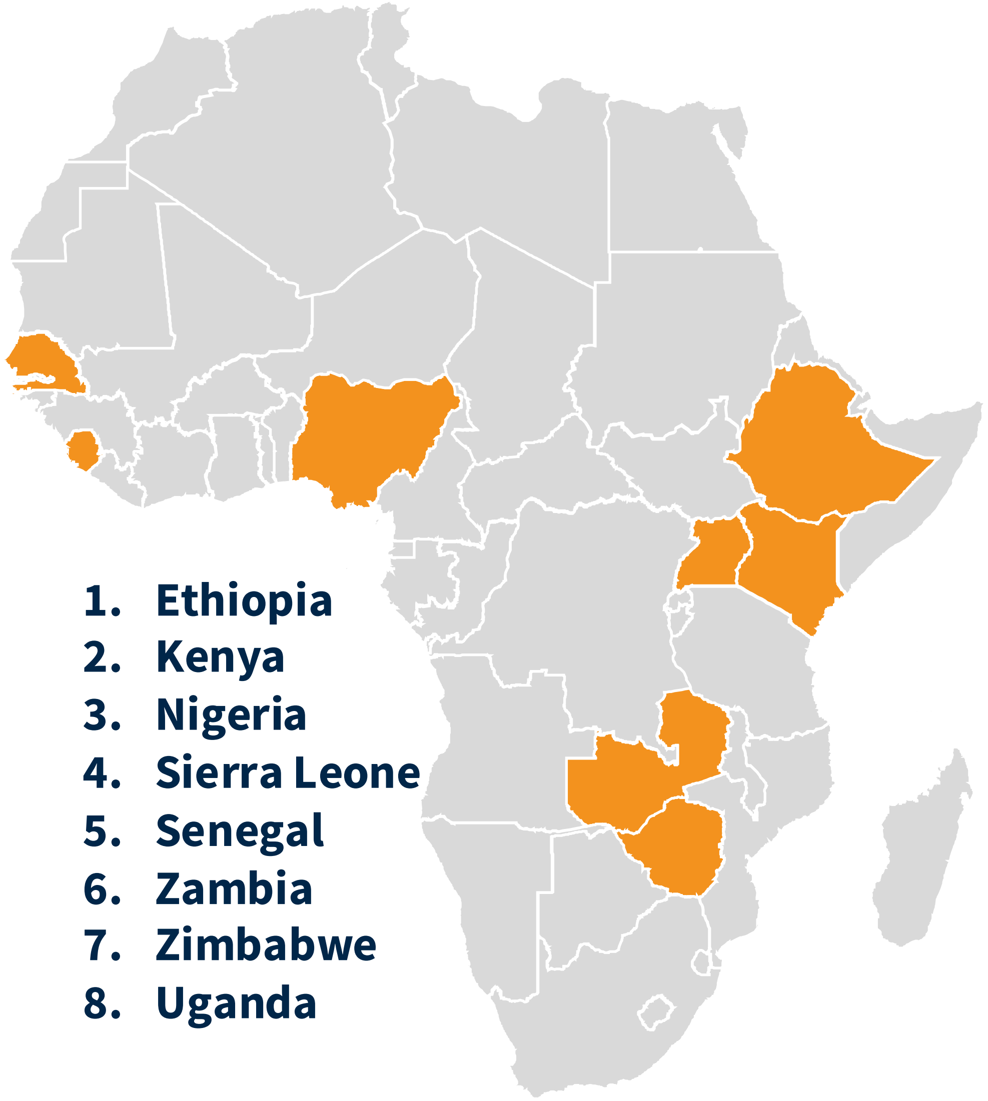
Quality & Standards

- IEC standards are adopted to ensure **off-grid solar products are safe, reliable, and durable**, giving consumers confidence and supporting a sustainable, high-quality market.

- IEC standards are increasingly **required** for:
  - Donor-funded procurement
  - National subsidy and RBF programs

- Non-compliant products **risk**:
  - Exclusion from tenders
  - Brand damage
  - Increased enforcement at borders

Business Takeaway: Standards compliance protects brands and enables long-term market access.



1. **Ethiopia**
2. **Kenya**
3. **Nigeria**
4. **Sierra Leone**
5. **Senegal**
6. **Zambia**
7. **Zimbabwe**
8. **Uganda**

Country case studies

Bulk Procurement Madagascar

Concerns raised by private sector actors on programme design & implementation

Bulk Procurement — Madagascar

Launch of Tender on Bulk procurement and Giveaway Program

To distribute portable SHS kits to the poorest and most vulnerable communities

Private sector actors raised concerns on beneficiary selection, technical specifications, markets risks and aftersales support

GOGLA made a formal submission to UNOPS and the government of Madagascar

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In response, the government drafted a plan of action articulating the way the program would be implemented

Business takeaway: Bulk procurement rewards manufacturers aligned with specs and volumes.

Output Based Fund - Nigeria

Affecting companies with verification process & payments

Output-Based Fund Initiative by the World Bank — Nigeria

Launch of the Output-Based Fund (OBF), implemented by Nigeria Electrification Project (NEP) & DARES

Provides grants to solar service providers and developers based on verified outputs

Complex verification process caused delayed payments and administrative bottlenecks

Through GOGLA's intervention, including a consultation with the participating companies' partial payments were secured

Business takeaway: Public finance programmes create demand but require strict compliance.

Finance Bill 2025 - Kenya

Advocacy on removal of VAT exemptions for OGS products/components

Finance Bill 2025 — Kenya

Key development & GOGLA's influence: Removal of tax exemptions which were retained after OGS industry advocacy

Finance Bill 2025
- Submitted to Parliament in April 2025
- Members Briefed

Analysis of the Finance Bill
- Removal of tax exemptions
- Prepared a petition to Parliament

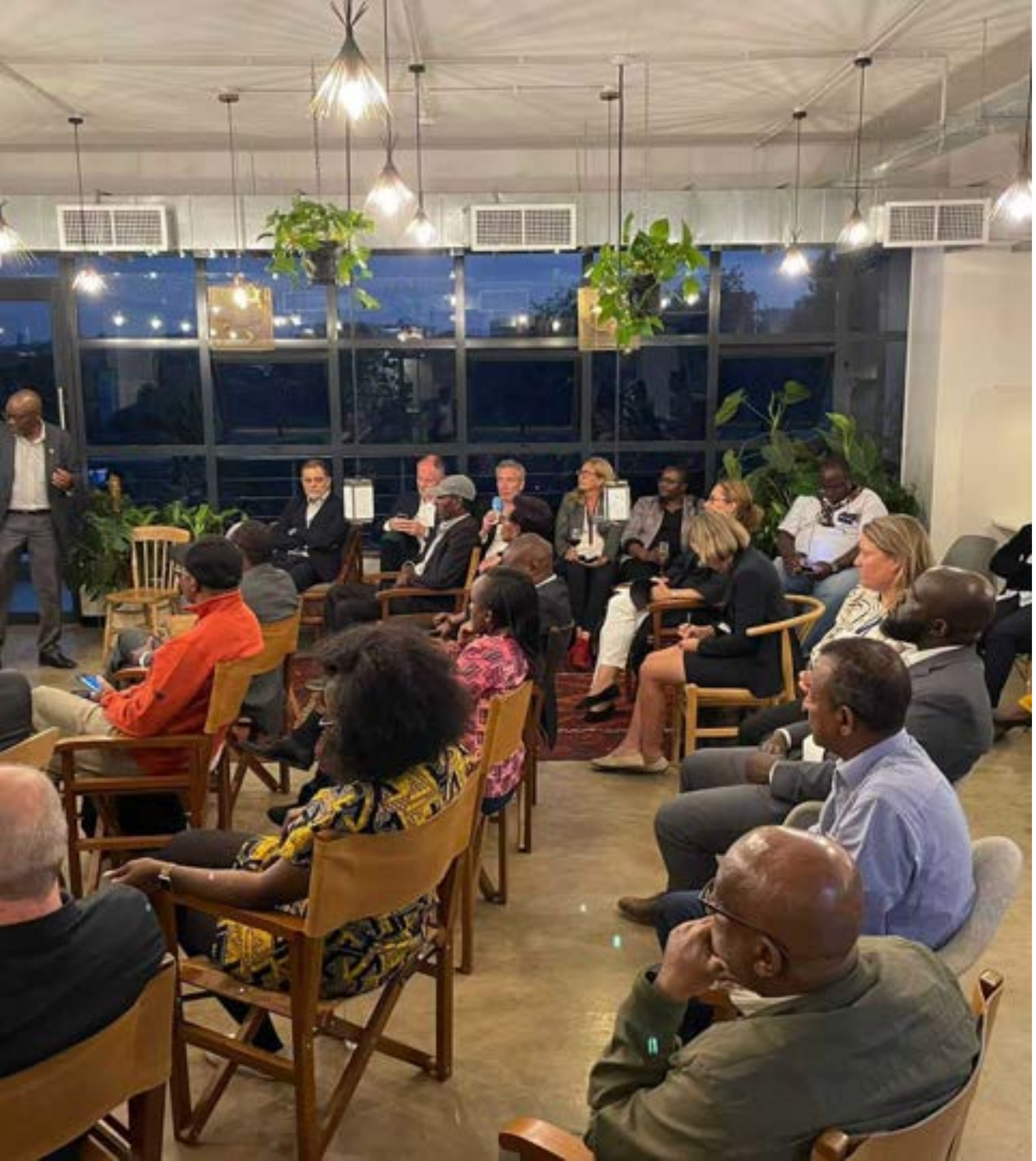
Public Participation
- Presented the petition to Parliament (Finance & National Planning Committee – FNCP)
- Engaged MPs from pastoralist

FNCP Report & Parliamentary Debate
- FNCP delivers a report after public participation
- FNCP agrees with OGS industry petition
- OGS Tax exemptions retained
- Parliament passes the FNCP report

Finance Act 2025
- Finance Bill Assented into Law by the President

Advocacy
- Successfully advocated for retention of the tax exemptions for OGS

Business takeaway: Advocacy can directly protect product affordability and margins.



Why You Should Engage with GOGLA

- Navigate policy volatility and currency risk
- Anticipate standards and compliance requirements
- Reduce market-entry risk through collective action
- Improve access to donor- and government-backed programmes

GOGLA helps companies move from policy uncertainty to predictable market access.

Thank you

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