Toolkit for clean energy access in displacement settings

New approach to building a participatory and inclusive marketplace for sustainable energy solutions

IOM
UN MIGRATION

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Toolkit for clean energy access in displacement settings

New approach to building a participatory and inclusive marketplace for sustainable energy solutions

Innovation Norway

IOM UN MIGRATION

NORCAP
PART OF NORWEGIAN REFUGEE COUNCIL

ACRONYMS

CBI	Cash-Based Intervention
CCCM	Camp Coordination and Camp Management
CfIP	Call for Innovative Partnership
CFM	Complaint and Feedback Mechanism
DTM	Displacement Tracking Matrix
ICS	Improved Cookstoves
IDP	Internally Displaced Persons
KAP	Knowledge, Attitudes and Practices
IOM	International Organization for Migration
MSLA	Multi-Sectoral Location Assessment
RFP	Request for Proposal

PREFACE

This toolkit for access to clean energy in displacement settings is based on the learnings from the project "A new approach to building a marketplace for sustainable energy solutions in displacement settings" funded by Innovation Norway and implemented by IOM with the support of NORCAP. The project aims to establish a sustainable market for clean energy in displacement settings in Mozambique, by bridging the gap between the demand and supply side.

In the dynamic landscape of humanitarian assistance, addressing the energy needs of displaced populations is increasingly recognized as a key component of durable solutions and sustainable development. The role of private actors in this endeavour has been also highlighted as critical for addressing the breadth of the challenge. As such, the International Organization for Migration (IOM) has embarked on a journey to bridge the gap between the demand for sustainable energy solutions and the supply of products and services from the private sector in displacement settings. The complexities of this task necessitate a comprehensive approach that combines innovative solutions, strategic partnerships, stakeholder engagement and knowledge-sharing.

This toolkit aims to serve as a practical support to other humanitarian organizations and private providers who want to collaborate to develop and implement clean energy solution in close coordination.

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This toolkit was made possible thanks to the IOM and NORCAP team, composed of Anais Matthey-Junod, NORCAP Energy Expert and Anna Benetello, IOM Migration, Environment, Climate Change and Risk Reduction Programme Officer, in charge of the implementation of the project and the development of the toolkit.

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Finally we acknowledge the work of Linn Tomasdotter in defining the structure of the toolkit and the design work of Jorge Rodríguez.

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Ndedja resettlment site, Sofala Province, Mozambique. © IOM 2024 / Jaqueline HERODEK

INTRODUCTION

Maria Felipe Francisco, merchant and solar freezer's user, Ndedja resettlment site, Sofala Province, Mozambique. © IOM 2024 / Jaqueline HERODEK

INTRODUCTION TO THE TOOLKIT

Why a(nother) toolkit?

In the dynamic landscape of humanitarian assistance, addressing the energy needs of displaced populations is increasingly recognized as a key component of durable solutions and sustainable development. The role of private actors in this endeavour has been also highlighted as critical for addressing the breadth of the challenge. As such, the International Organization for Migration (IOM) has embarked on a journey to bridge the gap between the demand for sustainable energy solutions and the supply of products and services from the private sector in displacement settings. The complexities of this task necessitate a comprehensive approach that combines innovative solutions, strategic partnerships, stakeholder engagement and knowledge-sharing.

The development of this toolkit arises from the recognition that effective dissemination of knowledge and best practices is essential for catalysing positive change in displacement contexts. By documenting the learnings, tools and approaches from a pilot project tested in Mozambique, IOM aims to empower stakeholders with the necessary resources to replicate and scale similar initiatives in other settings. By distilling complex concepts into accessible and actionable insights, the toolkit aims to facilitate informed decision-making and catalyse positive change in displacement contexts.

Who is the toolkit aimed at?

This toolkit is designed to serve a diverse range of stakeholders involved in humanitarian assistance, development and private sector impact for sustainable development. This includes governmental agencies, intergovernmental organizations, non-governmental organizations, private sector entities, donors, researchers and any practitioners working in displacement settings. Whether you are a donor or investor seeking evidence-based solutions, a humanitarian worker navigating operational challenges, or a private sector actor exploring opportunities for collaboration, this toolkit provides valuable insights and practical guidance for advancing sustainable energy solutions in displacement contexts.

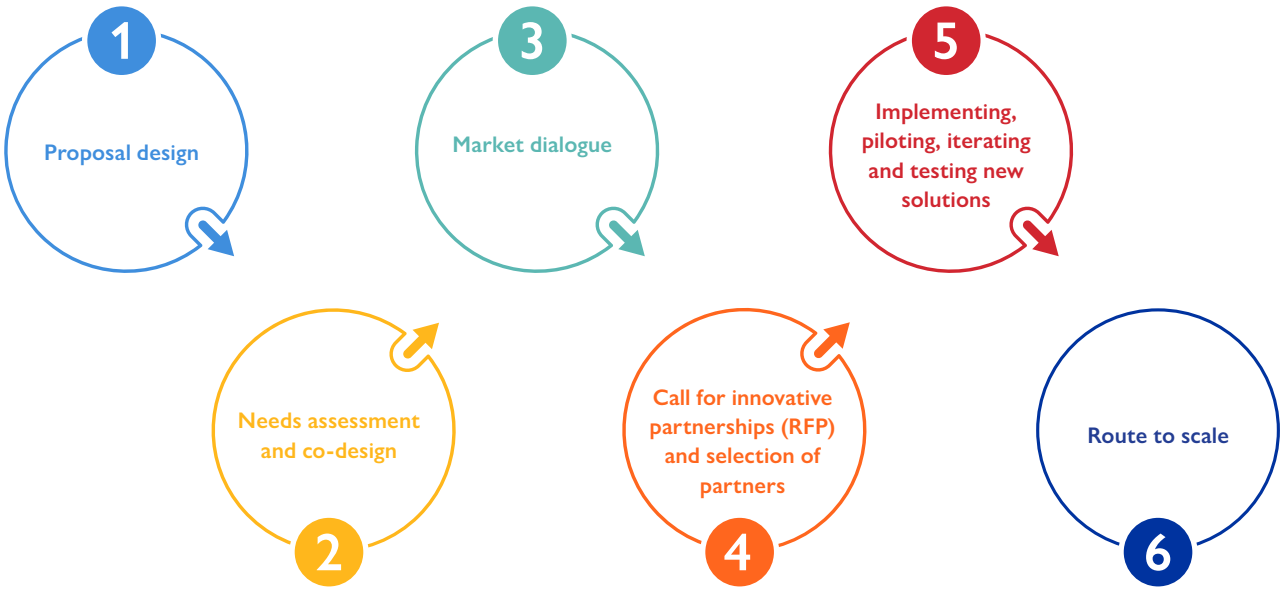
How to navigate and use the toolkit?

To ensure the toolkit is practical and easy to use, the toolkit is organized in a user-friendly manner, incorporating various features to enhance accessibility and usability. Each section presenting a phase of the approach contains the same structure:

- **Introduction:** presents briefly the objectives (why) and outcomes (what) of the phase;
- **Key activities and steps:** provides guidance on the sequence of activities/steps to ideally implement the phase of the project;
- **Roles and responsibilities:** highlights how different stakeholders should be engaged and/or are influencing the project's phase;
- **Learnings, takeaways, recommendations:** list key insights gathered during the IOM pilot project in Mozambique and/or other similar projects;
- **Suggested tools, templates and resources:** recommends a list that can be used to support the toolkit's user to implement the project's phase;
- **Case example:** illustrates the project's phase outcomes based on the IOM pilot project in Mozambique.

Colour coding for different phases of the process

The toolkit employs colour coding to distinguish between different phases of the main process, allowing users to navigate through each stage and subsequent steps seamlessly.



Type of resource or tool (icons)

Icons are utilized to categorize different types of resources or tools within the toolkit. For instance, tools or templates may be represented by a wrench icon, while case examples are denoted by a document icon. This visual cue helps users quickly identify the type of content they are seeking.

Tools or templates

Recommendations or learnings

Case example

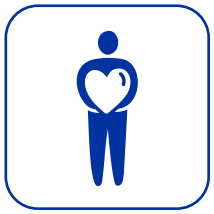
Relevance to different Stakeholders (icons with advice or tips directed to a specific type of partner).

Humanitarian organizations

Private sector partners

Donors

Government and local leadership



Displaced communities

CLEAN ENERGY ACCESS IN DISPLACEMENT SETTINGS

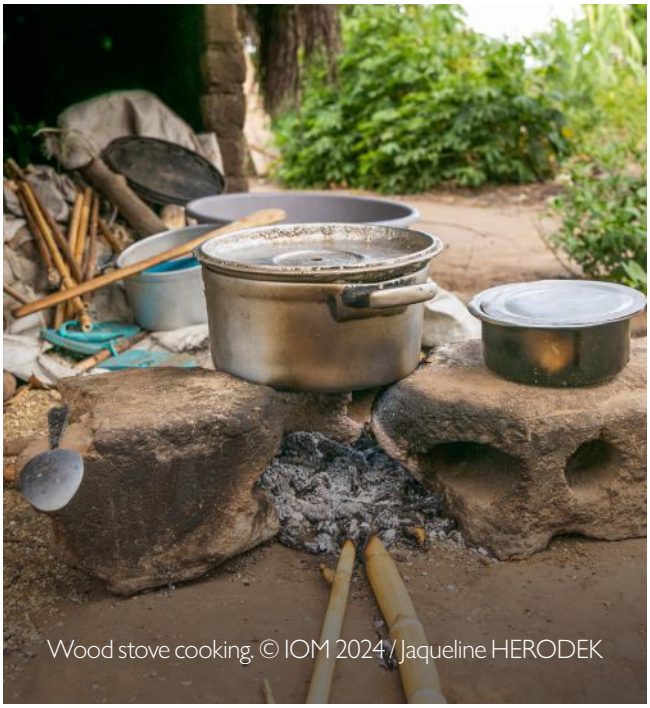
Ndedja resettlement site. @ IOM 2024 / Jaqueline HERODEK

UNDERSTANDING THE CONTEXT

This section presents the pilot project, context and main principles and the cross cutting approaches used to establish a clean energy market place.

The Problem

This project was spurred by the imperative to change the way the humanitarian sector and other stakeholders address the energy access challenges confronting internally displaced persons (IDPs) worldwide. According to the State of the Humanitarian Energy Sector Report (2022) approximately 94 per cent of displaced individuals in camps worldwide still lack access to electricity and 81 per cent rely on firewood and charcoal for cooking. Additionally, basic energy products and services are often provided through humanitarian assistance, potentially disrupting local economies. With a high confidence, the IPCC Sixth Assessment report states that climate hazards are increasingly impacting involuntary migration and displacement.[1] Given the impact of climate change and the expected increase in disaster displacement, IOM designated Sofala Province in Mozambique as a pilot area for intervention, where a total of 16,717 families have been displaced[2] by disasters and resettled. Recognizing the profound impact of restricted energy access on livelihoods, safety and environmental sustainability, the project aimed to bridge this gap by fostering the adoption of clean energy solutions.



Wood stove cooking. © IOM 2024 / Jaqueline HERODEK

Displaced communities in Sofala Province face significant barriers in accessing vital energy services, including electricity and clean cooking fuel. This deficiency not only exacerbates existing hardships but also amplifies vulnerability to gender-based violence, particularly for women and girls who must undertake arduous journeys to procure firewood. Insufficient lighting compounds safety concerns, limiting mobility and access to community infrastructures, including water points, schools and health centres. The project endeavoured to mitigate these challenges by deploying sustainable energy solutions tailored to the unique needs of displaced populations.

Furthermore, by working closely with private actors, the project aimed to overcome their barriers to enter into the energy market in displacement settings. This includes mitigating perceived risks for private actors and creating an enabling environment for their participation. Ultimately, the project seeks to unlock innovative solutions and sustainable business models that can effectively address the energy needs of displaced populations while fostering economic development and resilience within host communities.

1. Cissé, G., R. McLeman, H. Adams, P. Aldunce, K. Bowen, D. Campbell-Lendrum, S. Clayton, K.L. Ebi, J. Hess, C. Huang, Q. Liu, G. McGregor, J. Semenza and M.C. Tirado, 2022: Health, Wellbeing, and the Changing Structure of Communities. In: *Climate Change 2022: Impacts, Adaptation and Vulnerability.* Contribution of Working Group II to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change [H.-O. Pörtner, D.C. Roberts, M. Tignor, E.S. Poloczanska, K. Mintenbeck, A. Alegría, M. Craig, S. Langsdorf, S. Löschke, V. Möller, A. Okem, B. Rama (eds.)]. Cambridge University Press, Cambridge, UK and New York, pp. 1041–1170, doi:10.1017/9781009325844.009.
2. International Organization for Migration (IOM), 2023. Multi-Sectoral Location Assessment - Mozambique - Round 13 - December 2023 | Displacement Tracking Matrix (iom.int)

About the Selected Pilot Sites

Mozambique, with its history of frequent extreme weather events and displacement, emerged as an area for this pilot and addressing energy access challenges. Within the country, Sofala Province was identified as a priority area due to its high number of IDPs and acute energy needs, **highlighted by the DTM energy data collected between 2021[3] and 2022**.[4] The project targeted five resettlement sites within Sofala Province, hosting a significant number of IDP households (1,961, representing 9,806 IDPs)[5] affected by cyclones and other extreme weather events, such as cyclones Idai and Eloise, since 2019.

IOM's Role and its Partners

IOM played a pivotal role in spearheading this transformative initiative, leveraging its expertise in camp management and camp coordination (CCCM) and durable solutions, and commitment to addressing the energy needs of displaced populations as a critical pillar of its environmental sustainability efforts. With support from Innovation Norway and NORCAP, IOM facilitated the coordination of diverse stakeholders, mobilized resources, and provided technical assistance to ensure the successful implementation of the project. By fostering partnerships with three private companies (C-Quest Capital, GreenLight Africa and Epsilon Energia Solar) and one international non-governmental organization (Mercy Corps) and promoting innovative solutions, the project aimed to create a sustainable marketplace for clean energy in displacement settings, thereby enhancing resilience and improving the well-being of affected communities.

Ndedja resettlement site. @ IOM 2023 / Amanda NERO


Ndedja resettlement site. @ IOM 2023 / Amanda NERO

3. International Organization for Migration (IOM), 2021. DTM Central Mozambique — Multi-Sectorial Location Assessment — Round 21. IOM, Mozambique. https://dtm.iom.int/datasets/central-mozambique-multi-sectorial-location-assessment-round-21.
4. International Organization for Migration (IOM), 2022. DTM Central Mozambique - Multi-Sectorial Location Assessment Dataset - Round 22 - Public Dataset. IOM, Mozambique. https://dtm.iom.int/datasets/central-mozambique-multi-sectorial-location-assessment-dataset-round-22-public-dataset.
5. International Organization for Migration (IOM), 2024. DTM Mozambique — Multi-sectorial Location Assessment Dataset — Round 13 (Dec 2023). IOM, Mozambique. https://dtm.iom.int/datasets/mozambique-multi-sectorial-location-assessment-dataset-round-13-dec-2023.

CRUCIAL CROSS-CUTTING CORE PRINCIPLES AND APPROACHES

Inclusive and participatory principles

By fostering collaboration among diverse stakeholders, the project aimed to ensure that all voices are heard and valued. Inclusive and participatory principles are integral to the project's approach, ensuring that the voices and perspectives of displaced populations and other key stakeholders are central to decision-making processes. Through participatory methods such as co-design workshops and community consultations, the project seeks to empower individuals and communities to actively participate in shaping the design, implementation and evaluation of energy solutions. By promoting inclusivity and participation, the project aims to foster ownership, trust and accountability, ultimately leading to more effective and sustainable outcomes.

Community meeting, Muda Nunes resettlement site. @ IOM 2024 / Jaqueline HERODEK

The ecosystem process

This approach to establishing a sustainable market for clean energy in displacement settings is rooted in an ecosystem model that addresses both demand and supply-side dynamics, policy frameworks, and capacity-building efforts (including training and market linkages). Embracing an ecosystem approach entails recognizing the interconnectedness of various elements within the energy sector and beyond, including social, economic and environmental factors. This holistic perspective guides the project in designing comprehensive and sustainable solutions that address the multifaceted challenges of energy access in displacement settings.

Here's a brief overview of the overall process:

Figure 1: The energy ecosystem

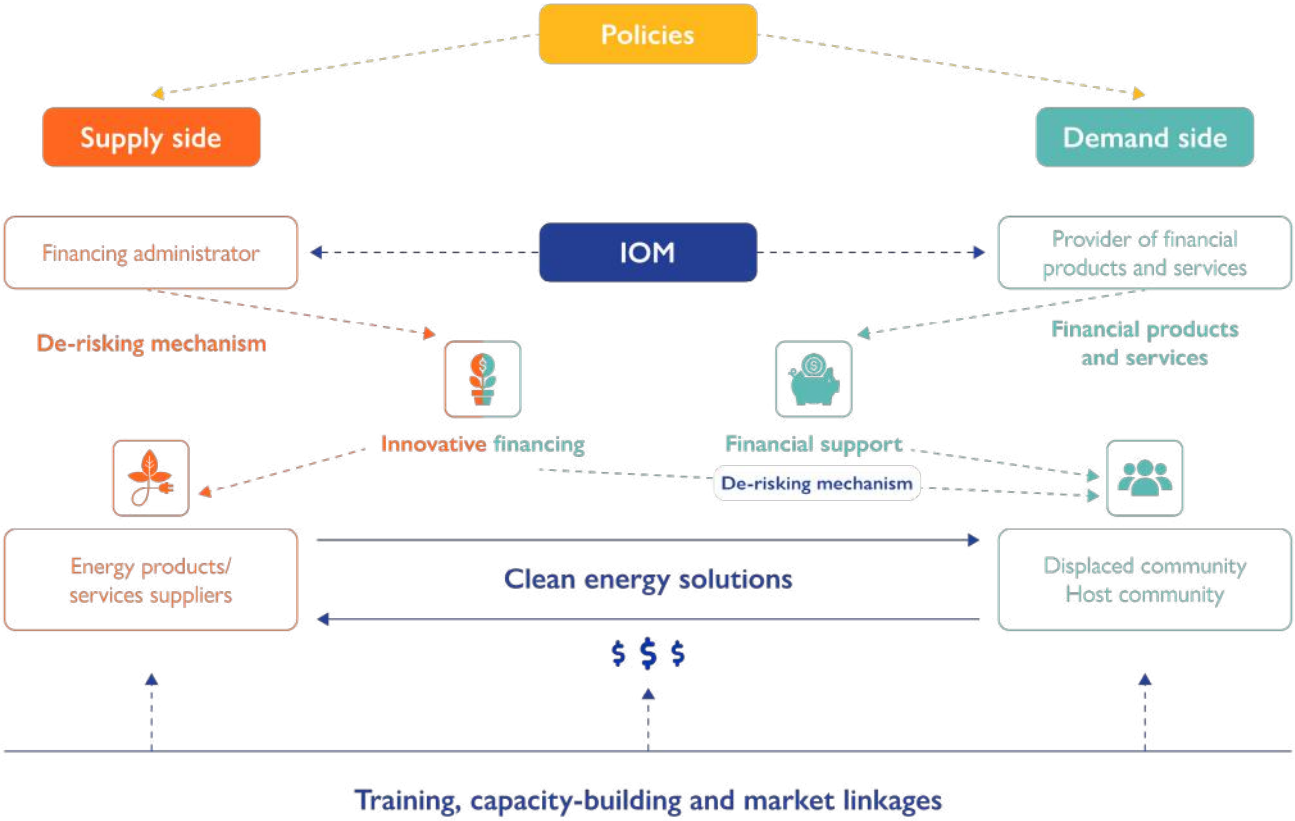


Figure 1 illustrates a comprehensive ecosystem model for providing clean energy solutions to displaced and host communities. At the centre of this ecosystem is a humanitarian organization – in that case IOM – which facilitates the collaboration between various stakeholders, including policymakers, financial institutions and energy suppliers. Policies shape both the supply and demand sides, creating an enabling environment for energy access initiatives.

On the supply side, energy suppliers deliver essential clean energy technologies, while the demand side includes the communities that benefit from these solutions. Financial institutions offer innovative financing and de-risking mechanisms to mitigate investment risks, ensuring the project's financial viability. Training and capacity-building efforts further support the communities in effectively utilizing and maintaining these energy solutions, fostering a sustainable market linkage that ensures continuous support and development.

The solutions and its core components

Workstream 1 – Clean cooking, nature-based solutions and community-based financial inclusion

This workstream focuses on enhancing cooking fuel efficiency and reducing environmental impact through the promotion of improved cookstoves and nature-based solutions. By introducing cleaner and more efficient cooking technologies, the project aims to reduce the reliance on traditional biomass fuels, mitigate deforestation and improve indoor air quality. Additionally, the workstream leverages on carbon financing to incentivize the adoption of clean cooking technologies, by subsidizing the technologies and ensuring long-term sustainability. Nature-based solutions are also integrated into this workstream, leveraging natural resources and ecosystems to enhance resilience and support sustainable energy practices.

Box 1: C-Quest Capital

C-Quest Capital is a carbon project developer with a mission of empowering rural communities to address climate change and drive sustainable development. We are committed to catalysing a sustained transition to a climate resilient future for communities whose well-being are most at risk from climate change. Our ambition is to use carbon finance to achieve a long-term transition to more sustainable alternatives at scale.

To learn more, visit https://cquestcapital.com/about

Workstream 2 – Productive uses of energy, business skills training and e-waste

This workstream centres on the deployment of solar energy systems for productive uses, refrigeration and irrigation, to improve the economic opportunities and livelihoods of displaced communities. By providing access to solar freezers and solar-powered irrigation pumps, the project aims to empower communities to engage in income-generating activities and improve food security. Subsidies are utilized to make solar technologies more affordable and accessible to displaced populations and host communities, thereby overcoming financial barriers to adoption. Through Workstream 2, the project seeks to catalyse economic development, enhance resilience and promote sustainable livelihoods in displacement settings.

Box 2: The Consortium's partners

GreenLight Africa

GreenLight Africa is a regional company with a base in Mozambique which has been developing projects and consulting since 2010 in two specific areas, namely: Energy and Environment.

In the Energy Sector, GreenLight focuses on off-grid and on-grid solar, wind, hydro and biofuels projects. They have experience in residential and industrial energy efficiency, sustainable charcoal production and improved and efficient cook-stoves. They provide technical support to a mix of stakeholders including private sector, government, development organizations and funding institutions. The scope of projects includes the development of feasibility studies; business models; monitoring and evaluations, fund management, market research; baseline studies; management of pilot projects; policy analysis and capacity-building initiatives directed at State agencies and ministries.

To learn more, visit https://greenlight-africa.com

Mercy Corps

Mercy Corps is a global team of humanitarians working together on the front lines of today's biggest crises to create a future of possibility, where everyone can prosper. Their mission is to alleviate suffering, poverty and oppression by helping people build secure, productive and just communities.

In more than 40+ countries around the world, over 6,000+ team members work side by side with people living through poverty, disaster, violent conflict and the acute impacts of climate change. Mercy Corps' approach to low-carbon development is rooted in innovative, market-based energy programming that both reduces emissions and supports livelihoods.

To learn more, visit www.mercycorps.org/who-we-are

Epsilon Energia Solar

Epsilon Energia Solar is a company that distributes and finances small solar systems in rural Mozambique. The business model combines last mile distribution, connected equipment, mobile money and effective credit management to deliver a Pay As You Go service to bottom of the pyramid households.

To learn more, visit www.epsilonenergia.co.mz/about-us

Ndedja resettlement site. @ IOM 2023 / Amanda NERO

PHASE 1: PROPOSAL DESIGN

Muda Nunes resettlement site. @ IOM 2023 / Amanda NERO

INTRODUCTION

In this phase, the focus is on grasping the contextual intricacies and pinpointing the primary needs and prerequisites from the end user's standpoint, as well as defining a vision for the role of private sector in tackling these needs. Understanding these aspects is crucial for crafting a successful project proposal that resonates with the challenges and aspirations of the target audience.

Objectives (why)	Outcomes (what)
Formulate a proposal that actively engages the private sector in devising and executing market-based approaches for clean energy solutions within displacement settings.	A meticulously researched proposal grounded in the realities and requirements of displaced communities and/or private sector stakeholders.
Specify the nature of innovation the project aims to incorporate, fostering novel solutions to address energy access challenges.	A proposal that draws upon insights gleaned from past experiences within the sector, harnessing existing knowledge to inform future endeavours.

KEY STEPS

Step 1	Organize a problem identification and design thinking workshop to inform project design, ensuring a user-centred and evidence-based approach.
Step 2	Identify an innovation and private sector partnership-friendly donor or call for proposal.
Step 3	Seek buy-in from senior management in your organizations as some innovation and partnership (refer to Strategies – see below).
Step 4	Anchor your proposal in concepts, trends, innovations and lessons learnt, from the energy sector in displacement settings.
Step 5	Collaborate with relevant internal entities (e.g. responsible for environmental sustainability, innovation and/or private sector partnerships – if these resources exist) to incorporate best practices and innovative approaches into project design.

ROLES AND RESPONSIBILITIES

Donor	Humanitarian organizations
Provide flexible and consistent grant opportunities and technical support, for example through the Humanitarian Innovation Programme from by Innovation Norway; Creating Hope in Conflict from Grand Challenge Canada; ELRHA, etc.	A meticulously researched proposal grounded in the realities and requirements of displaced communities and/or private sector stakeholders.
Share innovation project management tools.	Set up institutional innovation and private sector engagement strategies for staff to refer to for guidance on definitions, priorities and preferred approaches.
Share successes and failures of innovation piloted for inspiration and avoiding duplication of efforts.	**Government:** Liaise with relevant governmental entities to ensure the project aligns with the country's priorities, strategies and policies.

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

- **Embrace feedback and collaboration:** Incorporating feedback from various stakeholders, including internal units/staff specialized in innovation and private sector engagement, enriches the proposal development process and enhances the project's alignment with sectoral best practices and institutional strategies.
- **Define innovation and differentiation:** Clearly articulating the innovative aspects of the project, such as its unique approach to engaging the private sector and its departure from traditional humanitarian programming, helps set the project apart and communicates its potential value to donors and other stakeholders.
- **Foster inclusivity and participation:** Prioritizing the involvement of diverse stakeholders, including displaced communities, private sector entities and local authorities, fosters ownership and sustainability, while also ensuring that interventions are responsive to the needs and aspirations of affected populations.

- **Build partnerships for collective impact:** Leveraging partnerships with organizations possessing complementary expertise and resources, such as sectoral experts (e.g. from rosters), enhances project effectiveness and expands opportunities for cross-sectoral learning and collaboration.

- **Adapt to contextual opportunities:** Identifying and capitalizing on contextual factors, such as existing data collection mechanisms or favorable regulatory environments, can streamline project design and implementation, while also maximizing impact within specific geographic or thematic areas.

- **Cultivate organizational openness to innovation:** Creating an organizational culture that encourages experimentation and welcomes new ideas enables staff to explore creative solutions to complex challenges, fostering an environment conducive to innovation and continuous improvement.

Checklist	Question	Yes	No
1	Have you considered including an innovative financing (e.g. blended finance) component in your proposal? (see below definition)		
2	Have you clearly defined what type of innovation you're pursuing? (see Box 4 on the 4 Ps of innovation)		
3	Have you incorporated all sustainability aspects in your project? (sociocultural, environmental, political-legal, business model, economic, technological)[6]		

6. www.sciencedirect.com/science/article/pii/S2214629622001402

Box 3: Innovative financing

"The concept of humanitarian energy funding and financing sits in a difficult position between energy access, climate and humanitarian funding and financing sources [. . .] Displacement settings are complex and unpredictable operating environments, and present a range of risks and uncertainties for private companies and potential investors. Traditional approaches to the financing of energy access will not be supported by the risk/return characteristics of this market opportunity, so alternative [or innovative] structures are required. Such structures will be specific to the risk and type of project, and can include mechanisms such as grants, guarantees, "results-based financing" and "impact bonds". These blended financial instruments should aim to leverage first losses – whereby, in the case of default, the first loss is taken by the "impact-first" investors, or guarantors, thereby fully or partially protecting "finance-first" investors. This can enhance the attractiveness of investment opportunities for other sources of capital."

"Innovative financing refers to a number of non-traditional mechanisms for raising additional funds for humanitarian and development assistance. This may be through innovations such as micro-contributions, impact bonds, public-private partnerships and market-based approaches/ business models."

Source: Cohen, Y. and L. Patel (2019). *Innovative Financing for Humanitarian Energy Interventions*. Chatham House. Available at: https://www.chathamhouse.org/sites/default/files/2019-02-2019-InnovativeFinancingforHumanitarianEnergy.pdf

Savane resettlement site. @ IOM 2023 / Amanda NERO

Blended finance: an example of innovative financing

"Blended finance is defined as an approach for increasing the amount of project funding by combining different types of financing from different sources and/or for different purposes, which contribute to development, social, environmental or humanitarian goals and generate financial returns. It is common for one source of funding within the blended finance solution to act as a catalyst for raising additional funds."

"As outlined by the Organisation for Economic Cooperation and Development (OECD) and the World Economic Forum (WEF), blended finance can include one or more of the following financial support mechanisms: 1. Direct funding for the removal of commercial barriers; 2. Technical assistance; 3. Risk transfer mechanisms; and/or 4. Market incentives."

De-risking mechanism (also called risk-transfer mechanisms)

"Risk transfer reduces specific risks associated with a transaction. This mechanism provides direct compensation or assumes losses for specific negative events, addressing the concern of private capital providers to ensure their capital can be preserved related to project/company specific risks."

Source: Norwegian Refugee Council (2022). *Blended Finance Solutions for Clean Energy in Humanitarian and Displacement Settings: Lessons Learnt – An Initial Overview.*

Box 4: The four Ps of innovation

1. Product innovation – changes in the things (products/services) an organization offers
2. Process innovation – changes in the ways products and services are created or delivered
3. Position innovation – changes in the context in which the products/services are framed and communicated
4. Paradigm innovation – changes in the underlying mental models that shape what the organization does

Source: Francis, D. and J. Bessant, (2005). Targeting innovation and implications for capability development. *Technovation*, 25(3):171–183.

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
The Humanitarian Innovation Programme supports humanitarian-private partnerships to develop, test and scale new solutions that can contribute to better and more efficient humanitarian assistance. Read about the ongoing and completed projects via the link.	https://hip.innovationnorway.com/article/innovation-projects
Private Sector Engagement Strategy 2023–2027.	https://publications.iom.int/system/files/pdf/Private-Sector-Strategy_1.pdf
IOM Innovation Principles.	www.iom.int/innovation
The GPA Coordination Unit, with support from NORCAP and IOM, has developed an overview of blended finance mechanisms and their role in delivering sustainable energy solutions in displacement settings along with an associated Blended Finance Toolkit aimed at supporting energy specialists in developing market-based clean energy solutions.	www.nrc.no/resources/reports/blended-finance-solutions-for-clean-energy/

CASE EXAMPLE

Recognizing the pressing need for innovative solutions, IOM Mozambique strategically leveraged existing expertise within its staff to define the geographical area for the pilot (originally Nigeria or Mozambique). Drawing upon data gleaned from the IOM Displacement Tracking Matrix (DTM) and learning from previous IOM energy access initiatives, the project was meticulously crafted to address the specific opportunities identified in the sector such as blended finance as innovative financing, based on recommendations from a report released in 2021 jointly by the GPA and NORCAP with support from IOM. By fostering partnerships with organizations like NORCAP (CashCap and Green Shift Rosters), IOM aimed to bridge thematic areas and amplify impact, exploring cash-based interventions seamlessly into the clean energy marketplace.

Affected community in Savane resettlement site. @ IOM 2023 / Amanda NERO

PHASE 2: NEEDS ASSESSMENT AND CO-DESIGN

Affected Community at Muda Nunes resettlement site. @ IOM 2023 / Amanda NERO

INTRODUCTION

The journey towards addressing energy access challenges in displacement settings begins with a comprehensive understanding of the needs and aspirations of affected populations. In this phase, the critical process to ensure that interventions are tailored to meet the unique requirements of displaced communities are detailed. By engaging stakeholders in collaborative decision-making, practitioners can develop contextually relevant solutions that prioritize the voices and preferences of those directly impacted by energy access constraints.

Objectives (why)	Outcomes (what)
To gain insights into the energy challenges faced by displaced communities, using a gender, age and diversity approach to ensure beneficiary engagement and participation.	A nuanced understanding of energy usage patterns, needs, and aspirations across selected resettlement sites, informed by data collected through comprehensive needs assessments.
To utilize collected data to inform site selection and intervention prioritization, ensuring that project efforts are directed towards areas with the greatest need and potential impact.	Identification of priority intervention areas and sites for project implementation, guided by evidence-based decision-making and beneficiary input.
To lay the foundation for a co-design approach that fosters collaboration among stakeholders (including private sector) and facilitates the development of innovative, contextually appropriate solutions for clean energy access.	Establishment of a collaborative framework for co-design, laying the groundwork for stakeholder engagement and participatory solution development throughout the project lifecycle. Enhanced understanding and awareness among private sector stakeholders of the energy needs and context in displacement settings, facilitating the development of relevant and sustainable solutions that address the identified challenges and opportunities.

ROLES AND RESPONSIBILITIES

Displaced communities	Humanitarian organizations	Government and local leadership
Actively participate in data collection activities, providing insights into their energy usage patterns, needs and challenges.	Lead the energy needs assessment process, leveraging existing data collection mechanisms and methodologies. Facilitate stakeholder engagement and participation, ensuring that displaced communities are actively involved in the assessment process.	Ensure buy-in and ownership of project interventions from local leadership by actively engaging in decision-making processes and fostering a sense of empowerment and representation within their communities.

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KEY STEPS

Step 1	Define selection criteria, such as off-grid status, accessibility, community infrastructure and economic development opportunities, for shortlisting sites to assess.
Step 2	When possible, leverage existing data collection mechanisms, such as the DTM MSLA **(see Box 7)**, to gather high-level data on energy needs within displaced communities to help prioritize site to investigate.
Step 3	Design tailored needs assessment tools leveraging standardized tools from the sector.
Step 4	Train enumerators on data collection methodologies and ensure consistency and accuracy in data collection processes.
Step 5	Implement energy market[7] **(see Case Example)** and financial services assessments* **(see Box 5)**.
Step 6	Organize participatory workshops and co-design sessions to create a collaborative environment that fosters open dialogue, active participation and mutual respect among participants. Use creative tools and methodologies, such as design thinking approaches, participatory decision-making processes and visualization techniques, to facilitate co-creation of solutions.
Step 7	Document and synthesize insights, feedback and proposed solutions generated during co-design sessions to inform subsequent project planning and implementation phases.

7. As part of the pilot, an energy market assessment was conducted to establish the state of play across the (renewable) energy sector in Mozambique. This was achieved through a desk review of all policy, regulatory and project documents relating to the on/off-grid energy sector in Mozambique. This desk review was supplemented by the IOM Mozambique energy team's knowledge and experience in the sector.

Box 5: Financial services assessment and links to cash-based interventions

The partnership with NORCAP CashCap aimed to assess the feasibility of implementing cash-based interventions (CBI) to address energy access barriers in displacement settings. Initially, the goal was to conduct a market assessment to evaluate market functionality, financial infrastructure and the potential for CBI. However, some challenges arose due to differing understandings of a "market assessment" and "financial assessment" between the partners, leading to a need for realignment. Therefore, the CashCap Expert focused on the financial inclusion component of the terms of reference, investigating innovative financial services and products alongside traditional CBI models. Stakeholder consultations with microfinance institutions, mobile money providers and other relevant entities provided insights into service offerings, geographic coverage, costs and legal frameworks. The analysis identified risks and opportunities for implementing suitable CBI models tailored to the project's objectives:

Finding #1: Cash transfers without any restriction attached will allow households a great choice. Although, it allows to purchase non-sustainable energy products and services, consequently a deviation from the ultimate goal of the project. It's the case of mobile money that gives access to a wide range of services and goods. The delivery mechanism selected linked to this modality type could add some restrictions, such E-cash through smart cards that obliges to be spent in particular shops. However, a further assessment of digital platforms willing to work in Mozambique, as well as energy vendors willing to accept such platforms.

Finding #2: Vouchers bring restrictions and narrows down household options. Either paper or electronic mechanism should be selected according with different administration and compliance burden levels, depending on the communities' level of digital literacy, shops/ suppliers' capacity and interest to participate. Perhaps exploring some products or services that vouchers could be split in instalments according with achieved project goals.

Thanks to assistance through **Finding #3: Subsidies**, stakeholders might be willing to provide a partial amount up front and the beneficiaries would repay the remaining through a credit line in a set number of instalments, by joining group savings for example. This option may require a large effort on providing official documentation, collateral and bank account details, and financial literary training to the majority of the targeted population.

Box 6: Data collection and evidence-based analysis

While emphasizing the importance of data collection and evidence-based analysis, it's crucial to acknowledge the potential challenges associated with too much data, especially at household level. Excessive data can be time-consuming to analyse, leading to community fatigue and may result in unused or underutilized information. To mitigate these challenges, practitioners should establish a **clear analysis framework for the data collection exercise**. This framework ensures that data collection efforts are focused and purposeful, with a clear understanding of how the information will be used for decision-making. Additionally, stakeholders should be engaged early on to ensure their involvement in utilizing the data to design, evaluate or assess their interest in participating in the project. This approach maximizes the utility of collected data while minimizing resource wastage and community fatigue. Furthermore, by structuring data collection efforts within a defined analysis framework, practitioners can effectively identify key challenges, opportunities and intervention points, facilitating more targeted resource allocation and strategy development for impactful energy interventions.

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

1. **Integrated approach:** Adopting an integrated approach that combines energy needs, financial and energy market assessments allows for a comprehensive understanding of the energy landscape in displacement settings and in the country/area of interest. By analysing socioeconomic profiles, financial inclusion levels and market dynamics alongside energy needs, practitioners can develop targeted and holistic interventions.

2. **Data-driven decision-making:** A strong emphasis on data collection and evidence-based analysis is placed to inform decision-making processes. By gathering robust data key challenges, opportunities and intervention points can be identified, enabling more effective resource allocation and strategy development.

3. **Total energy access approach:** Embrace a "total energy access"[8] approach that assesses energy needs across various dimensions, including household, productive uses and community infrastructure levels. This approach allows to comprehensively evaluate energy usage, aspirations, and barriers, enabling more nuanced and effective intervention strategies.

4. **Community-centric assessments:** Prioritize community engagement and participation throughout the assessment process to ensure that interventions are responsive to the needs and aspirations of displaced populations. By actively involving community members in data collection, analysis and decision-making, practitioners can co-design solutions that are contextually relevant and sustainable.

8. A "total energy access" approach defines "access" as "when the full range of energy supplies and services required to support human social and economic development are available to households, enterprises and community service providers". Practical Action (2014). *Poor people's energy outlook 2014: Key messages on energy for poverty alleviation*. Rugby, United Kingdom, Practical Action Publishing.

Checklist	Question	Yes	No
1	Have you checked which existing information is available and if the data can be used to select the site?		
2	Have you clearly defined the criteria to select the site?		
3	Have you developed the tools needed to collect data in a way that ensures they are inclusive and sensitive to gender, age and diversity?		
4	Have you engaged with the local leadership and governmental entities in order to ensure buy-in and meaningful participation in the assessments and co-design activities?		
5	Have you reflected and adjusted on the levels of co-design you are able to offer to communities and other stakeholders?		
6	Did you set up a clear analysis framework for data you will collect, in order to ensure fair use of time of project's stakeholders?		

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
From theory to Practice: A review of co-design method for humanitarian energy ecosystems (Robinson, B. L., Halford, A. and Gaura, E. et al., 2022).	www.sciencedirect.com/science/article/pii/S2214629622000524
Inclusive Energy Access in Emergencies: A Handbook for Humanitarians (Mercy Corps).	www.mercycorps.org/research-resources/inclusive-energy-access-emergencies
3 Planning pro-poor energy services for maximum impact: *The Energy Delivery Model Toolkit* (CAFOD and IIED, December 2017).	www.iied.org/sites/default/files/pdfs/migrate/16638IIED.pdf

Box 7: Displacement Tracking Matrix multi-sectoral location assessments (MSLA) Energy module

The Displacement Tracking Matrix (DTM) is a system to track and monitor displacement and population mobility, provide critical information to decision makers and responders during crises, and contribute to better understandings of population flows. DTM was first conceptualized in 2004 to monitor internal displacement in Iraq and has since been adapted for implementation in 90 countries, including in contexts of conflict, natural disaster, complex emergencies and protracted crises. MSLA collects information at location level, in each location where population of concern lives (e.g. IDPs). It usually uses closed questions interviews with Key Informants and Observation by enumerators. With this method and sources, MSLA can provide useful information on the availability of energy products and services, and barriers to accessing basic products and services faced by displaced populations.

DTM data is often used to understand locations, direction, scope and scale of displacement, as well as trends. Intersectoral and sectoral information can also be used as alerts by response actors, to identify red flags, locations and areas in urgent sectoral need where intervention and follow-up of in-depth assessments should be prioritized. Access to basic energy services (e.g. for lighting, cooking and basic connectivity) is a responsibility that is not clearly assigned to any humanitarian responder due to its cross-sectoral dimension. Therefore, ownership and responsibility for data collection and energy provision is unclear and often context-dependent. For that reason, DTM aims to provide relevant information to all clusters, sectors, agencies and NGOs.

DTM MSLA questions, for example, are designed to be answered by non-sectoral experts, so that the results can be used by sectoral experts for analysis: colleagues working on CCCM, food security, shelter and non-food items, protection, water, sanitation, hygiene and other sectors can use DTM data on energy needs, priorities and barriers faced by displaced populations. DTM has a large and consistent coverage of crisis, can be adjusted to collect information that Partners need and provides regular updates that can indicate how displacement, needs, resources, conditions of displaced populations and barriers to goods and services for displaced populations evolve over time. Partners can use the data to follow changes, identify where barriers are minimized and intervene where new obstacles appear.

More information: https://displacement.iom.int/sites/g/files/tmzbdl1461/files/tools/DTM%20FAQ_Infosheet_0.pdf

CASE EXAMPLE

In the resettlement sites of Mozambique, an extensive energy needs assessment was conducted using a "total energy access" approach. The assessment utilized a mixed-methods approach (quantitative and qualitative), combining household-level surveys, key informant interviews, focus group discussions and site observations to capture insights from diverse population groups.

Socioeconomic profiles and financial inclusion	Household energy	Productive use energy
The majority of households (87%) rely on agriculture as their primary source of income, with almost half earning less than MZN 3,000 per month. Despite high mobile phone ownership (85%), a significant portion (47%) has never accessed any financial services. Mobile money is a popular mode of payment (51%), but formal financial inclusion remains low.	Predominantly, households (86%) use firewood for cooking, while battery-powered torches (60%) are common for lighting. Most households (74%) express willingness to pay for solar kits with multiple functionalities and improved cookstoves.	Informal businesses such as grocery shops, barber shops, and milling stations operate in the sites. Productive energy uses are limited, primarily encompassing lighting, phone charging, hair cutting and milling.

Recommendations:

1. **Immediate action:** Urgent steps are needed to unlock energy systems and services for IDPs.

2. **Equal importance:** Recognize the equal significance of energy for households, community and productive use from the IDP perspective.

3. **Financial support and education:** Address demand-side financial support and education to foster a sustainable energy market.

4. **Capacity-building:** Enhance demand-side energy capacity to stimulate the improved cookstove market.

5. **Ecosystems approach:** Embrace a holistic "total energy access" approach, acknowledging its complexity but also potential for comprehensive impact.

In addition to the energy assessment, three co-design workshops were organized. One undeniable fact shouts the loudest – access to modern, reliable and sustainable energy systems and services would significantly boost quality of life and unlock aspirational futures. Unfortunately, the resettlement sites approached these conversations with hesitance due to the impact of previously unfulfilled promises by the government and other energy projects. There was a universal understanding that access to energy would improve the quality of life, participants listed many examples, including security, improved health, no fire risk from solar panels, improving yield in fields and increasing the opportunities for starting businesses. It was stressed the quality and reliability of energy systems and services is critical and must be combined with post-sales support. IOM also invited participants to reflect on two areas, what happens after energy (or electricity) arrives in the communities and how to make their voices heard. Above all, the key message of these workshops is clear, "all we want is energy". Using Technology Implementation Model for Energy (TIME) as a framework for analysis (Robinson), the recommendations were:

#1 Pre-sale, implementation and post-sale support are critical elements of Energy Systems and Services in the IDP setting.

#2 Inclusive financing is needed to unlock energy access across the household, community and produce use levels.

#3 IOM must act as an ambassador to build trusting and equitable partnerships between energy actors (private sector, governments) and IDP communities.

PHASE 3: MARKET DIALOGUE

Savane resettlement site. @ IOM 2023 / Amanda NERO

INTRODUCTION

For innovation projects with a strong focus on private sector partnerships, a market dialogue is a step that should not be overlooked. It takes place prior to the procurement process, in order to establish a conversation between humanitarian organizations looking for new ways to address a pressing need and the private actors able to provide solutions. In addition, other stakeholders (government, non-governmental organizations, academia, etc.) should participate (or be part of) the dialogue in order to share experiences and identified opportunities, as well as perceived risks and barriers.

Objectives (why)	Outcomes (what)
Identify potential solutions that were not known to the humanitarian organization.	Documented challenges, risks and opportunities related to the needs and the possible solutions to the problem.
Understand any existing barriers preventing the private sector to engage in solving the energy access challenge.	A foundation for establishing a call for innovative partnerships.

Ndedja resettlment site, Sofala Province, Mozambique. @ IOM 2024 / Jaqueline HERODEK

KEY STEPS

Step 1	Map the stakeholders through desk research and consultation of humanitarian energy sector groups.
Step 2	Engage early on with procurement colleagues (or any other relevant one(s) you foresee influencing) who will support you to align with organizational policies, and initiate dialogue on the particularities of the innovation and partnership processes.
Step 3	Define a clear strategy by formulating key hypothesizes to verify, and key questions to be answered by the private sector and other stakeholders. Consider a strategy that will allow to formulate clearly the challenges, opportunities, and risks to manage while designing solutions to address the needs.
Step 4	Decide on the best modality to host the market dialogue session(s) (in-person, virtually, etc.).
Step 5	Convene, listen, steer conversations and document your learnings.

ROLES AND RESPONSIBILITIES

Donor	Humanitarian organizations
Create a conducive environment for innovation and private sector partnerships by allowing for enough time to conduct a market dialogue as part of the project workplan. Provide guidance on conducting market dialogues.	Identify and reach out to potential solution providers and other relevant stakeholders to take part in the market dialogue. Steer the conversations based on energy needs' and market's findings.
Academia, civil society and other stakeholders	**Private sector**
Based on research/past project experience, share insights on energy solutions that work and do not work, as well as ones that could be adapted to the needs of the displaced communities.	Share insights on barriers perceived and opportunities to enter the market in displacement settings and address the energy challenge(s). Point out to solutions they could tailor to the needs of the displaced communities.

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

- **Understanding virtual attendance dynamics:** Approximately half of the registered participants did not attend the online market dialogue sessions. This attendance rate is common in webinar settings, reflecting the challenges of virtual engagement. It's notable that about half of the participants attended both sessions, indicating sustained interest among a significant portion of the audience.

- **Clarifying expectations:** Many participants anticipated that the market dialogue sessions would lead directly to the launch of tender/procurement processes. This highlights the need for clear communication regarding the purpose and expected outcomes of market dialogue sessions, with expectations effectively managed to align with the collaborative innovation process.

- **Navigating collaborative innovation:** Some organizations lacked prior experience with collaborative innovation processes, leading to confusion about their role in shaping the agenda. Particularly, stakeholders were unsure about the relevance of engaging with various parts of the energy ecosystem. This underscores the importance of providing guidance and context to participants to facilitate meaningful contributions.

- **Engaging diverse stakeholders:** The participants represented a diverse range of entities, including donors, governmental agencies, NGOs, private energy companies, consultancy firms and academia. However, there was a perceived need for increased engagement with financial institutions, given their critical role in the process.

- **Challenges in stakeholder participation:** Some stakeholder groups, such as telecom operators and financing institutions, showed limited or no participation. While the passive role of telecom operators was expected, engaging financing institutions proved challenging. Efforts were made to target these groups directly in subsequent bilateral meetings, recognizing their significance in ecosystem transformation.

- **Utilizing feedback surveys:** Feedback surveys from the market dialogue sessions served as valuable tools for identifying potential candidates for bilateral meetings. These surveys helped streamline engagement processes, identify stakeholders who grasped the process well, and determine the best approaches for further engagement, particularly in the context of the Call for Innovative Partnerships.

- **Managing global audience introduction:** Introducing the project to a global audience for the first time required additional explanation about the project's background and context. This initial orientation impacted the length of interactive sessions but ensured that all participants had a clear understanding of key project elements.

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Checklist	Question	Yes	No
1	Have you clearly defined the goals of your market dialogue: what do you expect to find out, and how will you leverage this for your call for partnership and attract private sector's interest?		
2	Have you performed a stakeholders' mapping and ensured all relevant participants were invited to the call?		
3	Have you leveraged existing humanitarian or sectoral networks/associations, social media/newsletters, etc., to advertise the market dialogue invitations?		
4	Have you decided which methodology to use to facilitate the activity (online or in-person) and which tools to use (e.g. Miro Board)?		
5	Have you prepared a clear guide for facilitating the market dialogue?		
6	Have you made sure you are aligning with procurement rules of your organization? Did you make sure it was a fair process, sharing the same level of information with all potential partners?		

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
Miro Board from IOM Mozambique's pilot project.	https://miro.com/app/board/uXjVPQlutuA=/?share_link_id=446886569662
Summary of the Market dialogue's findings from IOM Mozambique's pilot project.	https://mozambique.iom.int/sites/g/files/tmzbdl1106/files/documents/2024-07/market-dialogue-session-1.pdf https://mozambique.iom.int/sites/g/files/tmzbdl1106/files/documents/2024-07/market-dialogue-session-2.pdf
Innovation Norway's Template for invitation to market dialogue.	https://hip.innovationnorway.com/article/tools-and-resources
Innovation Norway's Planning template for market dialogue.	https://cdn.sanity.io/files/loal7n8w/inno-hip-prod/d5a01cd0bdbce1d98a8a1f529c707f0dfe41309c.docx

CASE EXAMPLE

IOM conducted two market dialogues sessions virtually and offered the opportunity for bilateral follow-up calls. The content of the first market dialogue session was imagined to gather inputs about clean energy access in displacement contexts globally as well as specificities of the situation in Mozambique. The second session focused on digging deeper into the learnings and themes of session 1, and the realities of the resettlement sites of the Central Provinces of Mozambique.

To ensure the smooth running of the sessions, IOM created very detailed facilitator and note taker guidelines which defined the roles and responsibilities of each participant of the session. In addition, IOM produced a Miro template for each session for participants could use throughout of the online dialogue (see tools above – Summaries of market dialogue 1 and 2 and Miro templates). IOM recorded 164 registrations and 73 participants for the first sessions and 109 registrations and 62 participants for the second.

Box 8: Key takeaways from the market dialogue

Key Takeaways from market dialogue 1

- It is critical to negotiate the legacy of humanitarian agencies.
- IDPs (and most vulnerable groups) are left out of the conversation, often treated as customers rather than collaborators. Or a segment of the value chain rather than vulnerable groups that must be given agency over their own stories.
- It is critical to build holistic or total energy access ecosystems (for example linking financial institutions, energy companies, telecom companies to build credit access and histories).
- The flexibility of choice for IDPs is key – how can supply side mechanisms achieve this.
- It is necessary to incentivize the government/banks to develop policies to provide security for a business in the energy sector as well as to provide micro loans to unlock the ability of IDPs to pay.
- It is important to integrate additional functionality into existing energy systems (i.e. improved cookstoves with USB charging capabilities).
- There is a need to develop revenue generating activities to pay for energy services.
- Is it possible to integrate non-cash-based payment mechanisms into energy programming?
- Organizations need to build trust across the energy ecosystem.

Key Takeaways from market dialogue 2

- Providing Financial Education is a critical component of building a new energy market.
- There is a need to place IDPs at the centre of the energy systems and services to ensure sustainability for example, by creating savings groups or working with associations/cooperatives.
- Sharing market intelligence, data, and contextual knowledge can help to strengthen the business security and market stability of working with IDPs in the central regions of Mozambique.
- The innovative process needs to focus on decentralized solutions, that allow data-driven decisions to create new solutions and corporations between international and local companies.
- Technology is ready for a total energy access approach but are organizations willing to collaborate – how to enable this collaboration?
- Can creative hubs for energy use be created (i.e., treating the project as one ecosystem), establishing group associations that can share the risk and benefits across groups of entrepreneurs?

PHASE 4: CALL FOR INNOVATIVE PARTNERSHIPS AND SELECTION OF PARTNERS

Village Saving and Loan Association, Ndedja resettlment site, Sofala Province, Mozambique. @ IOM 2024 / Jaqueline HERODEK

INTRODUCTION

The Call for Innovative Partnerships (CfIP) represents a pivotal phase in the project journey, signaling the transition from planning to implementation. This phase is characterized by the solicitation of proposals from prospective partners, marking a significant milestone in the collaborative efforts required to address energy challenges in displacement settings.

Objectives (why)	Outcomes (what)
Identify and select innovative partners who can contribute to the realization of the project's goals by issuing a competitive call to foster collaboration with diverse stakeholders, including private sector entities, and leverage their expertise, resources and creativity in developing impactful solutions.	Identification and selection of partners who demonstrate the capability to deliver innovative and sustainable energy solutions tailored to the needs of displaced populations.

KEY STEPS

Step 1	Leverage existing templates and guidelines, and draft the partnership document, ensuring alignment with relevant procurement standards and organizational policies.
Step 2	Thorough review and feedback from key stakeholders, including advisory boards and procurement units, to refine and finalize the document.
Step 3	Develop a comprehensive plan to guide the selection process, outlining eligibility and evaluation criteria, and assigning internal responsibilities for proposal assessment.
Step 4	Officially launch and promote through various channels, such as the online United Nations' marketplace, social media platforms, and partner networks, to attract potential collaborators.
Step 5	Hold a conference to provide prospective partners with insights into procurement procedures, technical requirements, and evaluation criteria, ensuring clarity throughout the process.
Step 6	Publish a bid bulletin to address any inquiries and extended deadlines as necessary.

ROLES AND RESPONSIBILITIES

Private sector	Humanitarian organizations and academia
Review carefully the application requirements and ask for clarifications, if needed.	Collaborate with donors and stakeholders to develop innovative solutions and implement projects on the ground.

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

1. **Document length:** Longer RFPs documents may deter potential partners. Consider streamlining documentation to enhance accessibility.

2. **Clear communication:** Provide detailed guidance to prospective applicants and address queries promptly to mitigate confusion and ensure inclusivity.

3. **Flexibility in eligibility criteria:** Maintain flexibility in eligibility criteria to accommodate various types of applicants, including private sector organizations, consortia with non-governmental organizations, and/or academia.

4. **Engagement strategy:** Use a mutlichannel approach to publicize the RFP and attract diverse stakeholders, including social media, partner networks and industry associations.

Checklist	Question	Yes	No
1	Have you gathered and visualized all the inputs from the market dialogue, co-design workshop and needs assessment to ensure they are included in the CfIP?		
2	Have you involved your procurement and/or private sector partnerships colleagues early on in the design of the request for proposal's documents to ensure compliance and ensure it is innovation-friendly?		

3	Have you shared the CfIP with relevant stakeholders and within the relevant platforms?		
4	Have you developed a comprehensive plan to guide the selection process?		

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
Request for proposal (RFP): Call for Innovative Partnerships: Innovative and sustainable energy-related solutions for displacement settings in Sofala Province, Mozambique.	www.ungm.org/Public/Notice/189615
Step by step guide to innovation friendly procurement.	https://hip.innovationnorway.com/article/tools-and-resources

CASE EXAMPLE

The CfIP process successfully attracted 10 proposals from diverse stakeholders, reflecting a strong interest in addressing energy access challenges in displacement settings in Sofala Province, Mozambique. Through clear communication and strategic engagement, the CfIP facilitated the identification of innovative solutions and potential partners for collaboration.

PHASE 5: IMPLEMENTING, PILOTING, ITERATING AND TESTING NEW SOLUTIONS

Zito Araujo, farmer and irrigation pump's user living in Muda Nunes resettlment site in Sofala Province, Mozambique. @ IOM 2024 / Jaqueline HERODEK

INTRODUCTION

Implementing, piloting, testing, iterating and adapting new solutions in displacement settings is a critical stage that bridges planning with real-world application. This phase is about translating project concepts into practical actions that improve energy access for displaced populations. It involves setting up infrastructure, deploying technology, engaging with the community and evaluating outcomes to ensure sustainability and scalability. Drawing insights from the IOM pilot project in Mozambique, this section emphasizes a community-centred approach and collaboration with private partners to foster a sustainable energy marketplace.

Objectives (why)	Outcomes (what)
Implement strategic plans and theoretical frameworks through practical actions.	Successful installation and operationalization of clean energy technologies in displacement settings.
Test the practicality, effectiveness and potential for scaling new energy solutions.	Promotion of a cooperative environment, facilitating effective implementation and scaling of energy solutions.
Strengthen partnerships among humanitarian organizations, private sector entities, government bodies and local communities.	Empowerment of community members with skills in energy system management, promoting long-term sustainability and resilience.
Facilitate continuous improvement to ensure solutions effectively meet the needs of displaced populations.	Increase in community engagement and self-reliance, empowering communities to actively maintain and expand energy solutions.

KEY STEPS

Step 1	Revise detailed work plan to adjust timelines based on solutions to be implemented.
Step 2	Revise the monitoring and evaluation framework developed as part of the project proposal.
Step 3	Identify potential risks associated with the implementation (e.g. technical issues or community resistance) and implement strategies to mitigate risks.
Step 4	Inform the community and relevant government entities of the outcome of the partner's selection and energy solutions to be implemented.
Step 5	Hold demonstrations to educate community members on the proper use and benefits of the new technologies, aiming to promote acceptance and effective utilization.[9]
Step 6	Ensure flexibility during project implementation to adapt the solution and activities based on the outcome from the monitoring and evaluation.

Community meeting Muda Nunes resettlment site, Sofala Province, Mozambique. @ IOM 2024 / Jaqueline HERODEK

9. See Phase 6 for monitoring and evaluation activities and steps.

ROLES AND RESPONSIBILITIES

Government	Humanitarian organizations
Facilitate multi-stakeholder initiatives, ensuring that different actors work collaboratively towards common objectives and in alignment with supportive policies and frameworks that encourage the adoption of clean energy.	Contribute to training and educational programmes to enhance community knowledge and skills related to clean energy use and environmental conservation Help raise awareness about the benefits of clean energy and promote behavioural changes that support the adoption of new technologies Identify remaining gaps in the energy ecosystem for long-term sustainability.
Donor	**Private sector**
Facilitate knowledge transfer and the sharing of best practices to improve project implementation and outcomes.	Supply the necessary technology and equipment, and bring innovation to the project by introducing advanced and efficient technologies that can be tailored to the specific needs of displaced communities. Contribute to building technical skills within the community, fostering local entrepreneurship and creating job opportunities. Develop a sustainable market for clean energy products by establishing supply chains, creating business models, and offering financial solutions, such as microfinance or subsidies..
Displaced communities	
Actively and openly share feedback through dedicated communication channels established by the project implementers. Commit and attend capacity-building and knowledge-sharing activities around clean energy use to maximize the social, economic and environmental benefits associated with it.	

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

Importance of Flexibility

- **Community engagement is crucial:** Engage the community early and often to ensure acceptance, trust and sustainability. IOM's success in Mozambique highlighted the importance of involving displaced populations in every step. Involving community members in the planning and testing phases helps to reduce resistance to new technologies and fosters a sense of ownership and acceptance.

- **Adapting to local contexts enhances success:** Solutions that are tailored to the specific cultural, social, economic and environmental contexts of the displaced populations are more likely to be accepted and effectively utilized. Customizing technologies and implementation strategies to fit local contexts (e.g. governance, local habits), if necessary at the site level, can increase the likelihood of project success and sustainability.

- **Capacity-building ensures longevity:** Build local capacity to manage and sustain projects. Training provided by IOM and its partners empowered local communities to maintain and expand energy solutions independently.

- **Testing reveals practical challenges:** Pilot testing is an invaluable step that highlights real-world challenges, such as technical issues, user adaptability and unforeseen logistical hurdles. Pilot tests are crucial for identifying and addressing issues early, allowing for the refinement of solutions before wider implementation.

- **Manage community's expectations:** Setting realistic and clear expectations through continuous communication helps build trust and ensures that the community understands the project's scope and limitations, leading to better acceptance and cooperation.

- **Plan for unexpected delays:** Incorporating flexibility and contingency plans into project timelines and resources helps to mitigate the impact of unforeseen delays, ensuring project continuity and adaptability to changing circumstances.

- **Holistic approach enhances impact:** Addressing energy needs in conjunction with other community needs, such as safety and economic empowerment, creates a more holistic and impactful approach. Integrating energy solutions with broader community development goals can lead to more significant and enduring benefits.

Checklist	Question	Yes	No
1	Have you set up the necessary bidirectional communication channels/ mechanism to inform the community about the selected partners and solutions?		
2	Do you have local staff present in the pilot site(s) that are trusted by the community?		
3	Have you informed and engaged the local government?		
4	Have you decided which methodology to use to facilitate the activity (online or in-person) and which tools to use (e.g. Miro Board)?		
5	Have you set up a coordination structure that allows you to closely monitor and adapt the activities on the ground?		
6	Are you monitoring risks associated with political or economic trends that could cause delay in procuring some technologies or restricting access to the pilot site(s)?		

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
Communication piece on the project partners' solutions and overall project's approach.	https://youtu.be/uY_9vvGOaVM?si=ZmTBWtr9lR6H1EqD
Innovation Norway's Tools for communications. Communications Strategy Canvas | Article on communications in innovation projects | Social media quick tips.	https://hip.innovationnorway.com/article/tools-and-resources

Tools for sustainable business model funded by Fondation Botnar in partnership with the Digital Impact Alliance (DIAL), helps social enterprises, NGOs and small businesses think about their own sustainability and the sustainability of their digital solutions.	https://sustainabilitytoolkit.digitalprinciples.org/guide
Communication piece on the IOM Energy Ambassadors (local activists).	https://youtu.be/1GDVsH3NgBQ?si=Sh7pyS8ywD9FlcR6
Supporting creative business models for innovators in the humanitarian sector". Report by Alliance4Impact for Innovation Norway, 2022.	https://hip.innovationnorway.com/article/tools-and-resources

CASE EXAMPLE

IOM recognized that community engagement was fundamental to the project's success. By involving displaced populations from the outset, IOM ensured that community voices were heard, and their needs understood. Regular meetings with local leaders and IDP representatives combined with workshops allowed community members to participate in decision-making processes, fostering trust and ownership of the project. For instance, technology demonstrations by partners during the early implementation phase helped to present the energy solutions and ensure local preferences and daily routines were taken into consideration, ensuring high acceptance and sustainability.

Understanding the unique socioeconomic and environmental context of each resettlement site was crucial. IOM and its partners tailored the solutions to fit local realities, such as incorporating local governance structures and respecting traditional practices. For example, the selection process for village saving and loan groups were organized in a transparent and competitive manner, and allowing local preferences in terms of gender diversity (same gender or equal representation).

To ensure the sustainability of the project, IOM's partners invested in local capacity-building. Training sessions were conducted to empower Improved Cookstoves (ICS) and solar systems' agents to be capable of registering the ICS end-users, addressing issues from Productive Uses of Energy (PUE) customers, and maintaining the energy solutions independently. This not only enhanced local skills but also fostered a sense of responsibility and pride in managing new community assets effectively.

Pilot testing was instrumental in identifying and addressing practical challenges early on. For instance, initial trials of improved cookstoves revealed adjustments needed for local cooking practices in terms of location. Indeed, the design of the ICS requires a shaded area to prevent rain from damaging the locally built stove. However, the community was mostly used to cooking outside, in front of their house's porch, or inside the house (with limited openings to the exterior). Insights gained from pilot tests informed iterative improvements in terms of the design of a separate kitchen area, ensuring that the final implementations were optimized for resource use and air circulation efficiency.

Throughout the project, IOM and the project partners tried to maintain transparent communication to manage community expectations effectively. Clear explanations of project goals, timelines (including reasons for delays), and potential limitations built trust and cooperation among community members. Regular updates and feedback mechanisms allowed for adjustments based on community input, minimizing misunderstandings and promoting project alignment with community needs **(see Phase 6)**.

Recognizing the unpredictability of operational environments, IOM should have better incorporated flexibility into the project planning. Contingency plans should have been developed to address unexpected delays, such as logistical challenges due political instabilities in the Middle East at the end of 2023, which affected the maritime deliveries of solar products from Europe to Southern Africa. A proactive approach can ensure that project timelines remain on track despite unforeseen obstacles.

By integrating energy solutions with broader community development goals, IOM maximized impact beyond energy access alone. For example, solar lighting not only improved a sense of safety and health conditions, but also facilitated nighttime economic activities, contributing to local economic empowerment. This holistic approach enhanced community resilience and long-term sustainability of the energy solutions implemented.

During the implementation phase in Mozambique, IOM explored the sustainability of the business model for improved cookstoves by integrating it with a carbon credits scheme. By partnering with C-Quest Capital, the project aimed to generate high-quality carbon credits from reduced emissions, thereby creating an additional revenue stream to sustain the initiative. The project also established a subsidy fund for the productive use of energy, enabling families to afford solar home systems, which fostered economic activities. Through pilot testing and engagement with end-users, IOM and its partners gathered valuable feedback on the cookstoves' usability and the financial feasibility of adopting solar solutions for productive uses. This feedback highlighted the importance ensuring that financial models are accessible and beneficial to the community.

Solar panel at Ndedja resettlement site.
@ IOM 2023 / Amanda Nero

PHASE 6: ROUTE TO SCALE

Affected community at Savane resettlement site. @ IOM 2023 / Amanda NERO

INTRODUCTION

"Route to Scale" is a pivotal stage that focuses on expanding successful pilot projects or interventions not just in terms of the number of users, but also in enhancing the value and benefits they receive from the solutions. This phase involves strategic planning, resource mobilization, and stakeholder engagement to adapt, replicate and scale up effective energy solutions in new settings. Effective scaling requires careful consideration of the scalability of technologies, financial sustainability, strategic partnerships and the potential challenges that may arise during expansion, ensuring that the solutions deliver maximum value and impact to all users.

Objectives (why)	Outcomes (what)
Increase the geographic and demographic coverage of successful energy solutions.	Successful energy solutions are implemented across wider regions and more communities.
Develop scalable and financially viable models to maintain long-term operations.	Scalable models ensure continuous and sustainable operation of energy solutions.
Amplify the benefits of energy solutions by reaching a larger population, particularly in vulnerable communities.	Expanded projects lead to greater improvements in quality of life and resilience among displaced populations.

KEY STEPS

Step 1	Evaluate pilot success, identify key success factors and assess context suitability.
Step 2	Develop a scaling strategy.
Step 3	Identify funding sources and develop financial models.
Step 4	Leverage networks and foster multi-sectoral collaboration.
Step 5	Adapt and localize solution by tailoring the spproaches to fit the specific cultural, economic and environmental contexts of new regions, and incorporate feedback.

ROLES AND RESPONSIBILITIES

Donor	Humanitarian organizations
Offer financial support for scaling activities and facilitate connections with potential funding sources. Advocate for the replication of successful models and support policy changes that promote scaling.	Coordinate and lead the development and implementation of scaling strategies. Collaborate with government agencies, private sector partners and community organizations to facilitate scaling.

Private sector
Contribute financial resources and infrastructure to support the expansion of successful energy solutions. Help transfer and adapt technologies to new contexts and regions.

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

Checklist	Question	Yes	No
1	Have you considered the sustainability of the business model beyond the pilot phase? And if not, have you engaged the necessary resources to explore this aspect in parallel of the pilot?		
2	Have you set up an internal knowledge management plan about the project to ensure learnings are institutionalized and replication is possible in other contexts? Do you plan to share some learnings externally (e.g. in the form of a toolkit)?		

3	Have you set up an external communication plan about the project to share milestones and opportunities to partner for a possible scale-up phase, which will require securing additional resources?		

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
Scaling model, by Tinkr	https://cdn.sanity.io/files/loal7n8w/inno-hip-prod/1f7f52388874a73d9a8792656f5e9e804973257c.pdf
Tool for scaling, by Tinkr	https://cdn.sanity.io/files/loal7n8w/inno-hip-prod/e9f73cb104be385a7430181f8698d5d52c8a8f2b.pdf
The scaling scan, by PPP Lab	https://cdn.sanity.io/files/loal7n8w/inno-hip-prod/a1fccbb22d16068a70a189a1255e7daaaeeb536e.pdf

CASE EXAMPLE

In the IOM Mozambique pilot, the Route to Scale phase potentially involves expanding the successful pilot project to reach a broader population across multiple resettlement sites, including the host communities. The pilot's initial success with improved cookstoves and solar lighting in select households demonstrated significant benefits in reducing firewood dependency and improving community safety. To scale these benefits, IOM developed a detailed scaling strategy that included:

1. **Assessing scalability potential:** IOM evaluated the pilot project's success and identified key factors such as community engagement, technology adaptability and economic viability that would support scaling.

2. **Developing a scaling strategy:** A comprehensive scaling strategy was formulated, outlining steps to replicate the project in other geographical areas of Mozambique. IOM prioritized nearby geographical areas with similar energy needs and engaged stakeholders in planning and decision-making processes.

3. **Securing funding and resources:** IOM aims to secure funding from various sources, including grants and private investments, to support the expansion. IOM developed scalable financial models to ensure the project's sustainability in new regions.

4. **Building partnerships and collaborations:** IOM aims to leverage existing partnerships and formed new collaborations with local governments, private sector partners, and community organizations to facilitate the scaling process.

5. **Adapting and localizing solutions:** The improved cookstoves and solar systems would be adapted to meet the specific cultural, economic, and environmental needs of new regions. Pilot tests would be conducted in these areas to validate the effectiveness of new or adapted solutions.

6. **Implementing and monitoring scaling activities:** IOM would execute the scaling strategy, continuously monitoring progress and adjusting approaches as needed. Regular evaluations and feedback loops help identify and address challenges promptly.

7. **Documenting and sharing learnings:** IOM will document the scaling process, capturing best practices and lessons learned. These findings will be shared through reports and workshops, advocating for broader adoption of successful energy solutions.

By engaging strategic stakeholders at every step, IOM could successfully expand the benefits of their energy solutions to a larger population, ensuring sustainability and enhancing the quality of life for displaced and host communities across Mozambique.

Community meeting at Muda Nunes resettlement site. @ IOM 2023 / Amanda NERO

MONITORING AND EVALUATION

Affected Community - Elisa José Gimo at Savane resettlement site. @ IOM 2023 / Amanda NERO

INTRODUCTION

Monitoring and Evaluation (M&E), is a critical component of the project lifecycle, focusing on assessing the performance, impact and sustainability of implemented energy solutions in displacement settings. This phase involves systematically collecting and analysing data to measure progress against predefined objectives and indicators, ensuring accountability and informing continuous improvement. M&E provides valuable insights into the effectiveness of the project, identifies areas for enhancement, and ensures that the benefits of energy interventions are realized by the displaced communities. By integrating robust M&E practices, the project can adapt to changing circumstances, address challenges proactively and achieve sustainable, long-term outcomes.

Objectives (why)	Outcomes (what)
Evaluate the solutions to assess their practicality, usability and performance in real-world conditions.	Data-driven insights support informed decision-making and project adjustments.
Validate that the energy solutions are safe, reliable, and sustainable for long-term use.	Feedback-driven refinements enhance the effectiveness and user satisfaction of the implemented energy solutions.
Gather user feedback to refine technologies and implementation strategies for better effectiveness.	

KEY STEPS

Step 1	Establish a Monitoring and Evaluation plan in accordance with the project's Results Matrix, outlining key indicators, data sources and methods for data collection.
Step 2	Allocate clear roles and responsibilities among project partners for data collection, analysis and reporting to ensure accountability and efficiency in the M&E process.
Step 3	Establish a feedback loop to continuously gather input from stakeholders, especially the end-users of the solutions, during the implementation and testing phases, ensuring that any issues and suggestions for improvement can be promptly addressed.

Step 4	Conduct baseline (midterm) and endline assessments, for example knowledge, attitudes and practices (KAP) survey to gather initial data before and after the solutions' implementation.
Step 5	Analyse and report findings.
Step 6	Document best practices and lessons learned to guide future projects.

ROLES AND RESPONSIBILITIES

Donor	Humanitarian organizations
Offer opportunity to revise the results matrix after innovative solutions is designed as it might not be clear from the beginning what indicators would be relevant to monitor the impact. Review M&E reports to assess project performance and impact.	Lead the development of the M&E framework, ensuring it aligns with project goals and stakeholders' expectations. Conduct baseline data collection, regular monitoring and impact evaluations. Coordinate with project partners and stakeholders to centralize and gather comprehensive data and feedback.
Displaced communities	**Private sector**
Share preference for communication channels and explain local governance principles to ensure community representation.	Share data on sales, user registrations, technology adoption rates and grievances recorded on their site to inform evaluations. Incorporate feedback from customers/end-users.

LEARNINGS, TAKEAWAYS, RECOMMENDATIONS

- **Visuals for non-literate community members:** Traditional written grievance mechanisms (like forms) may not be accessible to non-literate community members, potentially limiting their ability to report issues or provide feedback. The use of visual communication tools, such as posters with images and symbols, and leveraging local activists to collect complaints/feedback and share information about the mechanism in small groups, can make grievance mechanisms more inclusive and effective. It would be therefore recommended to develop and distribute visual aids to explain the grievance process and engage trusted community figures to disseminate information, to ensure that all community members can easily understand and access grievance channels.

- **Multiple communication and grievance channels:** Relying on a single channel for communication and grievances can lead to information gaps and lack of transparency. Having multiple channels – such as in-person meetings, information desks, phone hotlines, and digital platforms – ensures comprehensive information flow and helps address issues from various sources, increasing project transparency and responsiveness. Establishing diverse communication and grievance channels allows to capture a broad spectrum of feedback and issues. This approach helps to cross-verify information and ensures that no issue goes unaddressed, fostering a transparent and accountable project environment.

- **Continuous monitoring is key:** Regular monitoring allows for the timely identification and resolution of issues, preventing them from escalating into significant problems. Consistent and systematic monitoring allow for timely adjustments and continuous improvement, ensuring that project objectives are met effectively. One recommendation is to hold weekly or biweekly meetings with individual project partners and quarterly meetings with all partners involved to review progress, share feedback, and leverage potential synergies to improve activities. This ongoing dialogue supports proactive problem-solving and stakeholder alignment.

- **Baseline, midterm and KAP surveys:** Establishing a baseline and conducting subsequent assessments are crucial for measuring project impact and progress. Performing a baseline survey helps in setting a reference point for evaluation, while (midterm and) endline surveys provide insights into the project's effectiveness and areas for improvement. Implement baseline, midterm (if resources allow) and KAP surveys to assess the project's impact comprehensively. These surveys provide valuable data to gauge changes over time and inform future project planning and adjustment.

Checklist	Question	Yes	No
1	Have you consulted the community members on their preferred communication channels for feedback and complaints? Did you make sure they were inclusive (gender, disability, language, literacy, etc.)?		
2	Have you established a Monitoring and Evaluation plan that includes the list of activities and a clear timeline for its implementation?		
3	Have you developed the monitoring tools?		

SUGGESTED TOOLS, TEMPLATES AND RESOURCES

List	Link
IOM Complaint and Feedback Mechanism (CFM) poster	https://mozambique.iom.int/sites/g/files/tmzbdl1106/files/documents/2024-07/cfm-energy-mecanismo.pdf
Kobo Toolbox template for reporting complaint/feedback	https://mozambique.iom.int/sites/g/files/tmzbdl1106/files/documents/2024-07/cfm-energy.pdf
IOM Monitoring and Evaluation Guidelines	https://publications.iom.int/books/iom-monitoring-and-evaluation-guidelines
Energy Practices In Ugandan Settlements Amid Environmental Challenges (KAP study)	https://ulearn-uganda.org/energy-practices-in-ugandan-settlements-amid-environmental-challenges/

CASE EXAMPLE

In the IOM Mozambique pilot, M&E played a crucial role in ensuring the project's success. The M&E team developed a detailed plan based on the project's Results Matrix, defining key indicators and data collection methods. IOM established a comprehensive feedback loop involving regular community meetings and diverse communication channels, such as suggestion boxes and hotlines, to gather continuous input from all stakeholders. Visual aids and local activists were employed to make the CFM accessible to non-literate community members, ensuring inclusive participation. Baseline KAP surveys were conducted to assess initial conditions, followed by regular monitoring and a midterm evaluation. Weekly meetings with project partners and quarterly reviews with all stakeholders facilitated timely adjustments and proactive problem-solving. The project team used the gathered data to refine the cookstoves and solar solutions, enhancing their effectiveness and user satisfaction. By integrating robust M&E practices, IOM ensured that the energy solutions not only met community needs but also contributed to long-term sustainability and resilience in the displacement settings.


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