



Mobilizing EE and RE industries in Maghreb Feasibility of an industrial association/network

Cairo, 13 November 2019



0. Background and Objectives

- Main Objective : Mobilize private sector in EE and RE sectors to improve implementation of national and regional EE and RE policies
- *Specific goal : Supporting the creation of EE and RES component manufacturing Industrial Associations to serve local EE and RES markets, with special focus on air conditioning appliances*
- *Deliverable* : Concept note including recommended modalities of operation
- Scope : Morocco, Algeria and Tunisia

0. Approach

Preliminary work

- Desk review
- Identification of EE and RE key stakeholders
- Adjustment of tools

Data collection & analysis

- 25-30 interviews in the 3 countries (donors, existing associations, sample of industries, etc)

Workshop - Algiers, 21 november

- Gather feedbacks on preliminary concept note
- Share experience and key success

Concept note finalization

- SWOT analysis
- Recommendations and way forwards

March-July 19

August - Oct 19

November 19

December 19

1. Market structuration



Algeria

- Many industries present on the market
- low structuration especially per sub-sector



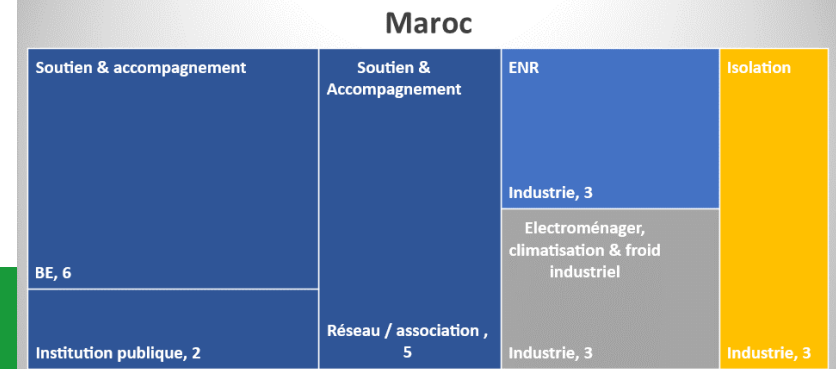
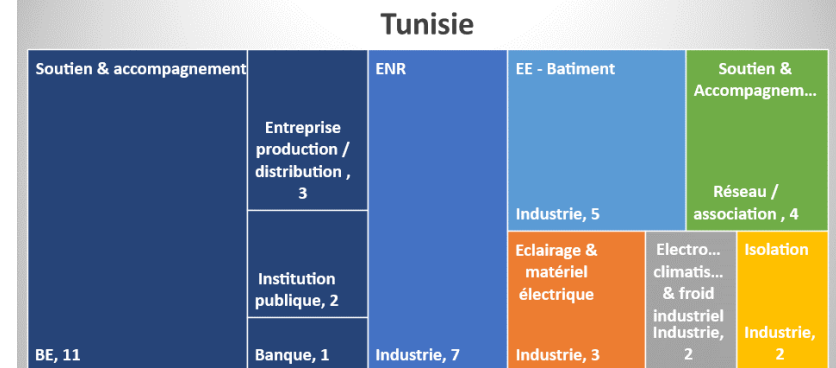
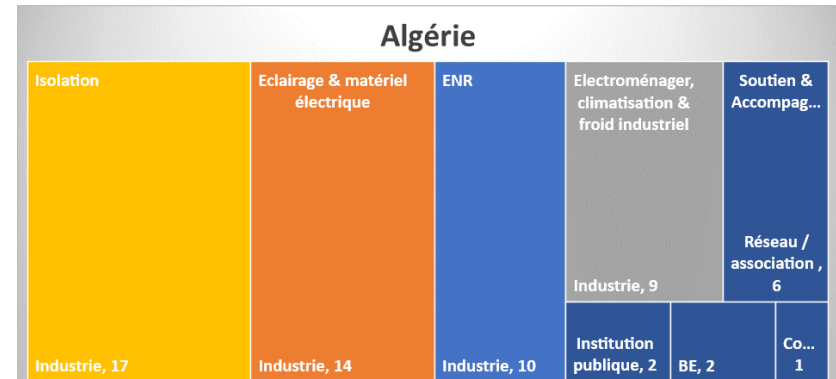
Tunisia

- Market quite dynamic
- Variable structuration per sector ;
- A cluster created in 2017 for EE and RE needs to be relaunched

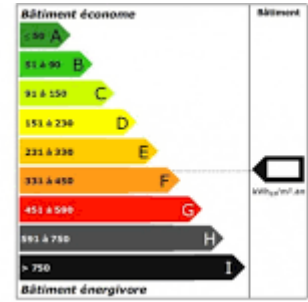


Morocco

- Quite good structuration : « Clusters » for RES, for insulating materials ;
- Association of professionals for « cooling »; Fédération of electricity professionals (FENELEC).



2. Expectations towards a national association



- **Being a recognized stakeholder for discussing with public authorities**
 - ✓ Examples in Algeria - Same taxes applied on all water heaters, issue of labelling appliances (control and enforcement) ;
- **Train and awareness raising on energy efficiency and energy performances of appliances**
 - ✓ Inform the consumers on product quality / energy performance
 - ✓ Train the professionals (installation, maintenance and retail) on energy performances of equipments and new technologies

3. Expectations towards a regional association (1/3)



- **Structure and strengthen relationships that are already existing between the 3 countries**
- **Promote industrial synergies** to create a market for green energy and technologies for the Maghreb
 - ✓ Contribute to policy dialog for harmonizing legislations
 - ✓ Market watch at regional level
 - ✓ Facilitate consortium of industries for tendering based on complementarity of industries or better sizing for regional market
 - ✓ Information on the regulatory framework differences in the countries

3. Expectations towards a regional association (2/3)



- **Support in technology transfer**
 - Facilitation and support for importing spare parts (ex of cooling industries) and high technologies
- **Increase export competitiveness outside Maghreb**
 - Facilitate access to international tenders (especially in Africa) thanks to complementarity
 - Promotion and communication of members value added
 - Sharing of technical experience.
 - Towards European market insertion in 15-20 years ; being a solid and reliable « supply-chain » for UE

3. Expectations towards a regional association (3/3)



- **Mutualize means and share knowledge**
 - Contribute to market Benchmarking
 - Share experience between industries on EE best practices per sub-sector
 - Produce statistics on market potential per sub-sector
- **Increase expertise on energy standards**
 - Training of members on specific issues (ISO 50 001 certification, energy audits, digital tools for energy management, etc).
- **Channel funds for members / projects**
 - Share experience on access to funding (commercial banks, international calls for tenders, international cooperation, etc)
 - Facilitate dialog with banks, etc

4. Conditions of success and risks

- From national to regional network...
 - Pre-requisite : having national associations / networks
 - Be careful not to substitute to /compete with existing associations
 - Keep a light structure (open and large network, small contributions (eventually different levels per « services » access))
 - Dedicated to private institutions but associating public institutions
- Build interest...
 - Build on specific projects that could interest members (appliances labelization, mutualization of laboratory, etc.,)
 - Find a balance between members interest and structure's interest – keep neutral
 - Communication and promotion of members and with members on a pragmatic way (digital tools, credible and key general messages, etc)

Thank you for your attention



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