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Policy Brief

Play a role for the future

ROLE OF NATIONAL RE STRATEGY IN ATTAINING

100% RENEWABLE IN TANZANIA



Photo credit:

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Play a role for the future

ROLE OF NATIONAL RE STRATEGY IN ATTAINING 100% RE IN TANZANIA

Key Messages:

- Transition to 100 % RE. by 2050 is possible, cost-effective and mitigate risks of fossil fuels
- RE is a driver of sustainable socio-economic development
- Fast-tracking upscaling of RE to 100 % by 2050 need a enabling environment for investors and stakeholders

Recommendation:

- **Devlop stand-alone Renewable energy strategy** : based on science-based and cost-effective scenarios for fossil fuel phase-out and transition to 100 %. RE including an action plan, resource mobilization plan , M&E and establishment of focal points. The strategy requires
 - **Defining annual sector trargets** based on cost effective transition scenarios to 100 % RE
 - **Participatory need assessment for strategy realization**
 - **Stand-alone RE-Policy and framework** to gurantee legal security for investors and stakeholders

Executive Summary

A vision of sustainable development: Phase-out fossil fuels, Scale-up RE

Tanzania is in process of implementing the Tanzania National Five-Year Development Plan 2021/22-2025/26 (FYDP III)- "[Realizing Competitiveness and Industrialization for Human Development](#)." Within the process among the enablers is attaining sufficient and reliable energy to power the process. To this end, multiple initiatives have been planned and undertaken to realize it. The national energy sector policy documents and agreements (such as Energy Policy 2015, FYDP III, National Environmental policy 2020M National Determined Contribution and many Others) all point toward increasing the role of Renewable energy (RE) within the generation mix and lowering the role of fossil-based fuel. This development pathway is preferred due to a multitude of reasons among which are national energy security, climate change concerns, socio-economic benefits of RE, meeting international commitments and environmental concerns.

Recommendation:

A stand alone RE strategy

Status-quo of the energy transition : Still high dependence on fossil fuels and slow scaling-up of RE

Though there is shown political will towards this RE pathway, the actual context is different to the expected directions. Although Tanzania has excellent wind, solar, geothermal and biomass resources for power production, in the energy mix of 2020 their total contribution to power generation is less than 2% apart from Hydropower. To further aggravate the concerns, the guiding plans which are Power System Master Plan 2022 ([PSMP 2020](#)) and Electricity Industry Reform Roadmap to 2025 do not appropriately plan for the increasing role of RE but increase the role of fossil fuel. Within the PSMP 2020, is planned for 12 % of the power generated in 2044 to be derived from non-hydro RE (solar, wind & geothermal) and increases the role of fossil fuels within the energy mix mostly from coal and fossil gas. Meanwhile, in Electricity Industry Reform Roadmap to 2025, it considers only 4.85% of non-hydro power renewables potentials. On top of the misalignment in the operationalization of the national policy, there are other challenges on the policy level that create an un-conducive environment for RE growth. They are tariff issues, legislative concerns, changing of regime wills, regulatory concerns and adequacy of sectoral coordination.

INTRODUCTION

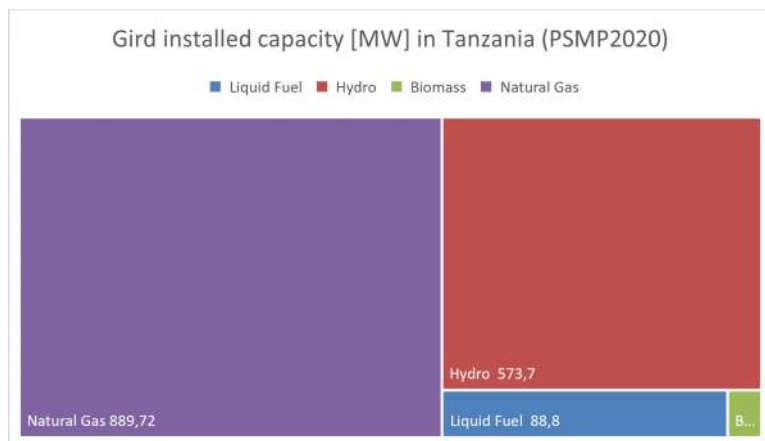
RE-Power for sustainable development

Tanzania is currently in its implementing the third phase of the five-year development plan- “Realizing Competitiveness and Industrialization for Human Development.” To realize the agenda among the requirements is attaining sufficient and reliable energy. To this end, multiple initiatives have been made in relation to energy, among which is the building of the Nyerere Hydro dam. The energy sector is administered mainly through the Electricity Supply Industry Reform Strategy and Roadmap 2014 - 2025, National Energy Policy of 2015, Power System Master Plan of 2020 (PSMP) and the National Rural Electrification Program (2013-2022) and other international and regional frameworks. All these guiding documents acknowledge and embrace the role of Renewable Energy and energy efficiency to spur socio-economic development and industrialization while promoting low carbon sustainability and achieving other policy goals. Furthermore, Tanzania is in multiple national and international agreements that purpurate its willingness to diversify and integrate Renewable energy within its energy mix, these agreements are such as the Paris Agreement, Africa Renewable Energy Initiative, Sustainable Energy for All and many more.

Still very minimal RE in the energy mix:

No plans for scaling up RE fast enough

Despite the political will, the adoption of renewable energy role within the energy generation mix is still very minimal, see Figure 1. Although Tanzania has excellent wind, solar, geothermal and biomass resources for power production, their total contribution to power generation is less than 2% apart from Hydropower. For better resilience, diversification (i.e., a mix of energy from diverse sources) in energy production is crucial as each source has its strength and weakness. By having a diversified portfolio of the energy mix, it better complements each other. Currently, the majority of RE is from Hydropower which is among the cheapest electricity worldwide and most susceptible to climate change's impact on water resources. Furthermore, the guiding plan ([Power System Master Plan 2022, PSMP 2020](#)) does not appropriately address the high potential of affordable RE in Tanzania, by Planning for 12 % of the power generated in 2044 to be derived from non-hydro RE (solar, wind & geothermal). The implementation of the PSMP 2020 will contribute to the climate crisis with 56 mt CO₂e annually by 2050 will a carbon-neutral power sectors with 100 % RE is possible by 2050 if an enabling environment for it will be created. Although it increases the role of fossil fuels within the energy mix mostly coal and natural gas. The continual dependency and use of fossil-based fuel within the energy mix is detrimental to the economy and environment hence needs to be phased out strategically. Recent scenarios for Tanzanian energy future show that a fast upscaling of 100 % RE by 2050 is possible and more cost-effective than relying on fossil-fuel base solution for enhanced energy access. (IRENA 2021, [Clean Energy Transition Tanzania 2022](#)) RE play a key role in fast-tracking the exit of



Advocating for a stand-alone national RE strategy

There is a multitude of factors challenging the adoption of renewable energy as highlighted in multiple works of literature.

With a clear will and goal, concrete actions need to be undertaken to rectify the situation to reach the benefits (i.e., socio-economic benefits, environmental benefits, and national benefits) derived from renewable energy.

This policy brief aims to advocate for a **stand-alone National Renewable energy Strategy** as one of the tools to rectify the situation. The strategy shall guide the development of RE, its integration into other sectors, alignment of different stakeholders' interests and facilitate the formulation of an institutional framework to address RE. By highlighting reasons for transitioning from fossil-based fuel, showing the role of RE in the transition and its benefits to the nation and person. This is further complemented by highlighting the current context of RE in Tanzania and the barriers associated, together with proposing of solution. The solution suggested is further strengthened by reflecting on case studies which have used similar solutions and attained significant results .

MOTIVATION: MITIGATE RISKS OF FOSSIL FUELS

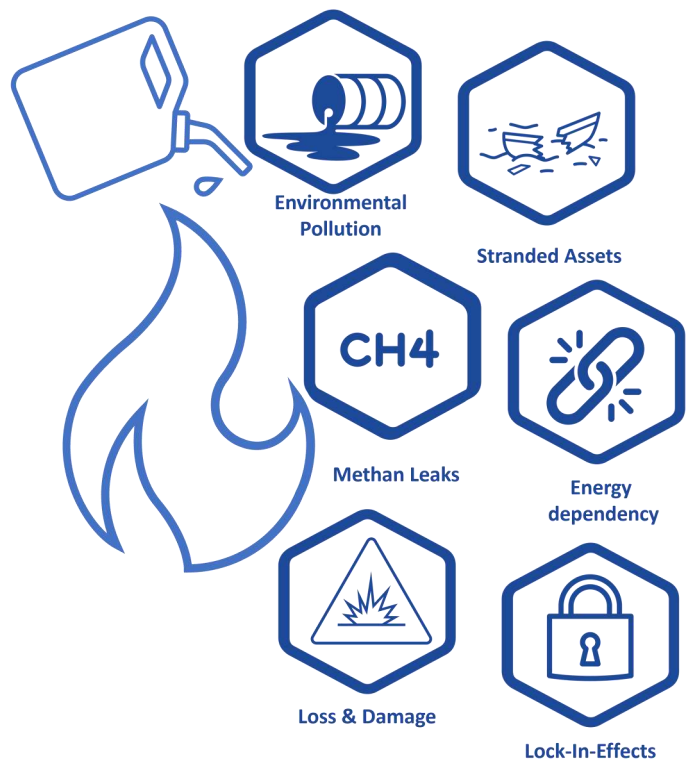
Don't play with the fire: Fast-tracking RE to mitigate risk of fossil fuels

The [Tanzania Power System Master Plan \(TPSM 2020\)](#) plans an energy mix for 2044 with still 60 % coming from high greenhouse gas-emitting fossil fuels such as coal and fossil gas. Fossil gas specific natural gas is often framed as a necessary bridging technology that must be upscaled in developing countries to secure development. Contrary to this, the dependence on such technology is like a quicksand pit that slowly hinders national development. Fossil fuel impact all Social Development Goals (SDGs) negatively and threaten the realization of SDGs significant. (Ref: [Fuelling Failure Report 2022](#)). Fossil fuels are a dangerous distraction from the necessary energy transition in developing countries as discussed below:

- **Lock-In effects:** Promoting and planning fossil fuels leads to lock-in effects and stranded assets. Fossil fuel infrastructure requires remarkably high investment and needs long-lifetime of over 30 years to generate a return on investment. The investments incurred prevents transition to other better alternatives due to cost implications. This causes [lock-in effects](#) and development path-dependencies thereby hindering transition and significant financial losses as result. Specific large fossil flagship projects of the five-year development plan as the LNG (Liquefied Natural Gas) Gas plant in Lindi (\$30 Billion), the Eyasi Wember Petroleum Exploration Project (\$ 2 Billion) and the Mnazi Bay North Petroleum Exploration project need critical review.
- **Energy dependency:** The highly volatile [prices of fossil fuels are a risk to energy security](#) threatening sustainable development. High exposure of the energy generation to the highly volatile market risks can cause energy insecurity for consumers in the case of soaring prices. This can be triggered by unpredictable events such as the Ukraine-Russia war that has led to a significant cost increase from May 2022, with the expectation to last a full year.
- **Loss and damage:** Loss and damage caused by climate change is increasing (e.g. impacts from extrem weather). The climate crisis is mainly caused by emissions from fossil fuels. A tonne CO₂e emitted in 2050 is estimated to [cause loss and damage of 273 USD](#). Therefore the implementation of the PSMP2020 would cause due to its emission in 2050 (56 mt CO₂e) **annual loss and damage of 15.2 billion USD**.
- **Environmental pollution:** Substantial risk of environmental pollution with serious impact on health and safety of people and environment if not effectively managed. Fossil fuels require expensive and complex sound management as the recently updated [National Environmental Policy 2021 \(NEP2021\)](#) of Tanzania. The NEP (National Environment Policy) 2021 is rising concern about several challenges in the sound management of oil and gas assets in Tanzania as “inadequate capacity on the management of pollution (...) compliance, and enforcement”.

DON'T POUR FUEL ON THE FIRE

RISKS OF FOSSIL INFRASTRUCTURE INVESTMENTS



- **Stranded assets:** The risk of fossil fuel project to become stranded [assets](#) exposes the government to potential high losses when their budget is highly dependent on income generated by investment in fossil Infrastructure. The Climate Policy [initiative](#) predicts that the oil reserve of Uganda can lose 56 % of its value under a global carbon transition scenario that limits global warming to well below two degrees Celsius. As the entire world is advocating for carbon transition and the project has a long lifetime to reach ROI, this puts at risk billions of dollars invested in this project and consecutive projects like the East African crude oil pipeline (EACOP) from Uganda to Tanzania.
- **Methane leakage:** [Global Methane Assessment](#) shows fossil gas is part of the problem, especially due to high methane emissions occurring along the value chain. According to the [IPCC \(Intergovernmental Panel on Climate Change\)](#), [methane has a Global Warming Potential of 87 higher than CO₂ in the first 20 years after emission](#). Therefore, methane emissions cause a high short-term greenhouse effect and warming, which is threatening to [trigger tipping points](#) in the global climate system, leading to uncontrolled warming that will threaten human existence.

MOTIVATION. MITIGATE RISKS OF FOSSIL FUELS

Exit fossil fuel production by 2042

Milestones: Reduce by 69 % by 2035

To limit global warming with a high probability of 1.5 ° exploration of fossil fuels have to phase-out fast including in developing countries. According to the [Tyndall Centre](#), Tanzania must **phase out fossil fuel production**, reducing it by 28 % until 2030, by 69 % until 2035 and by 93 % until 2040 reaching **net zero by 2042** to contribute to limiting global warming to 1.5 ° with a probability of 50 %. A just phase-out of fossil fuels exploration must be strategized and mainstreamed in Tanzania’s Energy policies.

Transition to 100 % RE by 2050

Most recent scenarios for Tanzanian energy futures show that a fast upscaling of renewable energy (RE) is more cost-effective than relying on fossil-fuel based solution for enhanced energy access. (IRENA 2021, Clean Energy Transition Tanzania 2022). Contradicting to this current Tanzania’s current guiding plans of the energy sector (Powers System Masterplan 2020: PSMP 2020) do not appropriately plan for the increasing role of RE but increase the role of fossil fuel. The Clean Energy Transition Tanzania scenario show-case how Tanzania can reach 100 % RE by 2050 and compare it to the business-as-usual scenario of PSMP.

RE play a key role in fast-tracking the exit of fossil fuels. A fast exit from fossil fuel use, import and production are essential to mitigate high risks connected to them that are a threat to a just and sustainable development.

FAST-TRACK RE IN TZ: UNLOCK SUSTAINABLE DEVELOPMENT

Multiple key roles of RE

Renewable Energy has various roles it can play to bring about socio-economic development and industrialization while promoting low carbon sustainability. RE can play a key role to mitigate the risk of fossil fuels and delivering many benefits.



Socio and Environmental Benefits	Economic Benefits	National Benefits
Energy access for rural areas It can supply energy to remote areas where it is not feasible by the grid	Low-cost Energy: Electricity from RE is more affordable (Lower Priced). Within Tanzania Scenario, it's more cost-effective to develop RE over fossil-based power generation	Energy Security Promotes Energy Security by getting independent from energy imports and fluctuating fossil fuel prices
Job opportunities Provides job opportunities within the value chain that addresses un-employments. For example, solar business has offered jobs to thousands of Tanzanians.	Business opportunities There are multiple business opportunities available to locals within the value chain. In addition, Mini grids owners can sell energy to national grids	International support Internationally promoted with aid provided in financial, technical, and advisory
Mitigate environmental impacts It contributes to the mitigation of climate change effects to a very high percentage. Beyond that, it mitigates the negative impacts of fossil fuels usage on health and the environment	More Finance for development More finances will be directed to economic development rather than to addressing climate change effects	Compliance Fulfilment of international commitments such as the Paris Agreement

FAST-TRACK RE IN TZ: UNLOCK SUSTAINABLE DEVELOPMENT

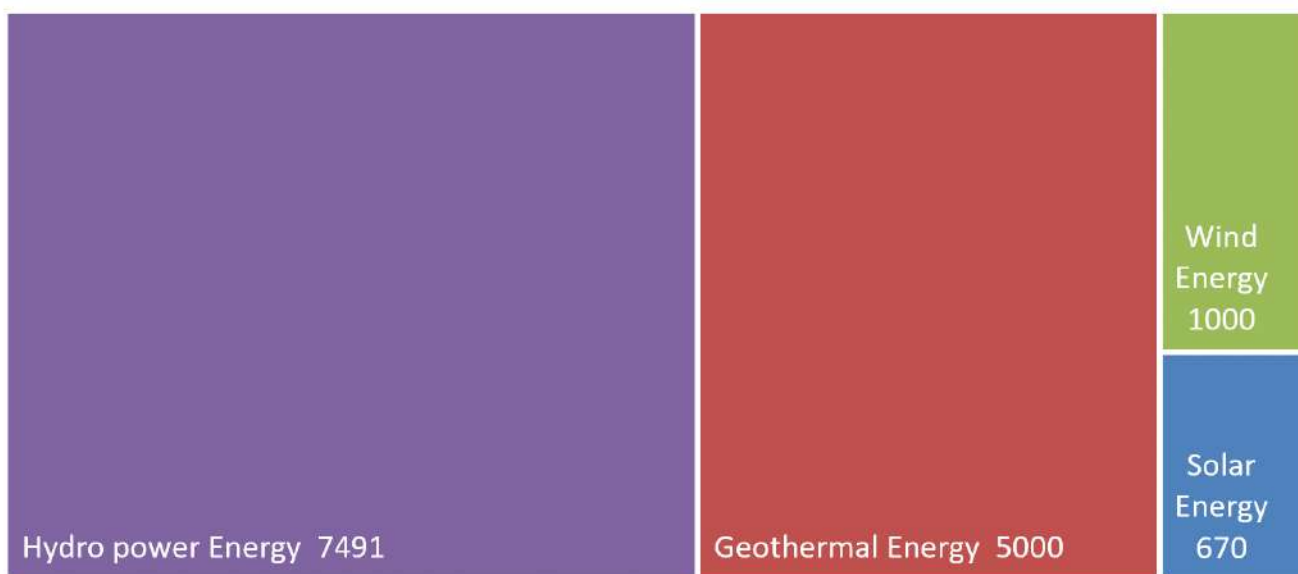
More than enough: High potential of RE in Tanzania

Tanzania has an immense potential within renewable energy to provide the required energy with multiple benefits as prior highlighted. See the below table highlighting the potential of different renewable energy sources

Type of renewable energy	Available Capacity [MW] (source: PSMP 2020)	Location in Tanzania
Solar Energy	670	Dodoma, Singida, Shinyanga, Iringa, Katavi, Rukwa, Tabora and Mara
Geothermal Energy	5000	Multiple regions in Tanzania among which are Mbeya, Songwe, Arusha, Manyara and Kilimanjaro
Wind Energy	1,000	The coastal region, central and northern regions notably Singida region
Hydropower Energy	7,491.2	Multiple rivers pass in different regions among which are Rufiji River and Ruhuji river
Biomass		All over Tanzania

Available Capacity (source: PSMP 2020) in MW

■ Solar Energy ■ Geothermal Energy ■ Wind Energy ■ Hydro power Energy



GAPS AND CHALLENGES

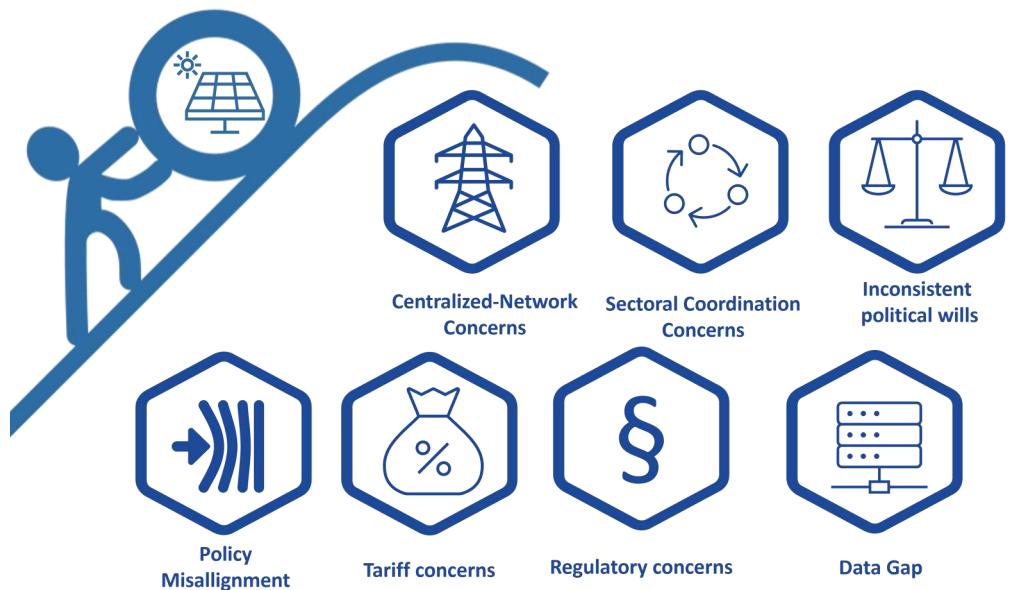
More than enough: High potential of RE in Tanzania

Despite the abundance of Renewable Energy potential and the acknowledgement seen in the national documents, still, there is the limited application due to multiple factors some of which are no effective mechanism or legal framework for facilitating and incentivizing energy access through RE, difficult access to finance for RE projects, lack of technology standards for RE technology, low dissemination of data and insufficient renewable energy skills and citizens' awareness and limiting policies.

Although there are existing challenges at the ground level implementation of RE projects, this policy brief will focus on the policy level gaps towards renewable energy development which are;

Overcome the Barriers

CHALLENGES ON THE ROAD TO 100 % RE IN TZ



Challenge 1: TOP LEVEL POLICY MISALIGNMENT

In future generation plans there is misalignment between the National Energy Policy (NEP 2015) and Power System Master Plan (PSMP, 2020), whereby the NEP 2015 asserts the shrinking of fossil-based fuels and promotion of renewable energy, meanwhile in the PSMP shows a significant increase fossil-based fuel notable coal and natural gas. Refer to Figure 2 showing the baseline production of 2019 and the projected energy shares by source.

Furthermore, another guiding plan within the electricity sector is the Electricity Industry Reform Roadmap to 2025, in which, only 4.85% of non-hydro power renewables potentials are being considered in the Electricity Industry Reform Roadmap to 2025.

RE sources have been given a diminished role within the energy mix up to 2044. This misalignment of policy and its implementation plan may lead to the under-development of renewable energy sources due to their continual diminished roles within the Energy plan up to 2044. This calls for decisive action that can bring to right the role of RE and

its requirement for higher contribution within the energy mix. The stand-alone renewable energy strategy can facilitate the attaining of desired policy goals as stipulated within the NEP 2015 and other policies.

Challenge 2: TARIFF CONCERNS

The primary legislation for generating, transmitting, and distributing electric power in Tanzania is the Electricity Act of 2008. The act focuses on cross-country electricity trading and rural electrification (Kihwele et al., 2012). In line with this act, the Electricity (Development of small power projects) Rules of 2019 and the electricity (Standardized small power projects tariff) order of 2019 stipulates all prerequisites and undertakings to develop and run power projects in the country. These recent rules and orders have put forward clear and simplified procedures for the development of mini and off grids in the country which enhance the best enabling environment for the development of decentralized renewable energy in Tanzania. The main challenge is still in the highly scattered settlement villages whereby the costs of electricity distribution become remarkably high. The tariffs being charged by the independent mini-grids are still expensive and cannot compete with HIGHLY SUBSIDIZED electricity-powered TANESCO and REA and thus pose a barrier to private investment in renewable energy plants. .

GAPS AND CHALLENGES

Challenge 3: REGULATORY CONCERNS

. Absence of guiding regulations on the quality requirement for some of the crucial components within the RE industry. The absence of this has given a gap to low-quality products and under-qualified personnel/organizations entering the market which has caused many losses and damaged reputation in the industry. Guidelines that ensure quality renewable energy products and services that users can rely on are needed.

Challenge 4: CENTRALIZED NETWORK CONCERN

Many renewable energy sites are found in remote that do not have central transmission lines (grid Line). The current general electrical power system is designed to accommodate a centralized system, which creates challenges in accommodating renewable energy from areas with no central system

Challenge 5: SECTORAL COORDINATION CONCERNS

Inadequacy of coordination between the existing energy policy of 2015 and other sector plans such as agriculture and forest continue to slow the pace in tapping potentials along renewables in the country. Furthermore, national commitments to international efforts such as the Paris Agreement through nationally determined contributions (NDCs) and Sendai frameworks on Disaster Risk Reduction experience limited linkages to national planning and implementations.

Challenge 6: INCONSISTENT POLITICAL WILLS

Tanzania is a democratic country hence entailed to change of leadership (regimes) within a given period. Due to many factors, among which is the absence of a clear guiding strategy, there are different directives and priorities within each regime. The unpredictability of regulatory regimes that have different directives and priorities on energy investment has a high investment risk, most notably in expansion and new investment in mini-grid projects.

Challenge 7 DATA GAP

Presence of data gaps that are crucial to planning, in addition to the available data being scattered in different organizations (sources) with many restrictions (red tapes) limiting the access and use of such data. To have a more informed energy planning and implementation, updated data are needed not only those related to energy but others such as demographic data, population density, economic activity and more. Furthermore, data sets are needed to track the impact and role of renewable energy within society for further improvement. Those kinds of data are currently not updated, or unavailable and some of the available data is not accessible to the general public thereby hindering effective planning and monitoring.

WAY-FORWARD

Proposed solution

To overcome these barriers for proper scale-up of renewable energy solutions requires a **stand-alone Renewable energy strategy** that guides in having a comprehensive policy framework, institutional framework, clear packaged projects, and a long-term strategy for harmonization. A well-designed framework for renewable energy deployment can offer concrete opportunities to show synergies and complementarities among the three challenges faced by Tanzania: energy security, socio-economic development, and climate change. To better understand the impact that can be achieved through a stand-alone strategy, two case studies are used to show its role and best practice.

A stand alone RE strategy:

Creating an enabling environment for RE in Tanzania

BEST-PRACTICE

A Case study on Bangladesh standalone RE policy

Create an enabling environment

Bangladesh is one of the most densely populated countries in the world, with 162 million inhabitants on a territory of 147.570 km². At the beginning of the century, Bangladesh was one of the poorest countries in the world, with 42% of the population considered extremely poor, and only 30% of the people in Bangladesh had access to electricity. In the year 2008, the government of Bangladesh adopted the Renewable Energy Policy to create an enabling environment and legal support for the promotion of renewable energy in the country. This translated into 800 MW power from RE by 2015, 2.000 MW by 2020, and 4.000 MW by 2030. To achieve these goals, the government **set up the Sustainable and Renewable Energy Development Authority (SREDA) as a focal point** for sustainable energy development and promotion, 'sustainable energy' comprising renewable energy and energy efficiency. The goals of SREDA are to promote, develop and coordinate renewable energy and energy efficiency programmes in the country. SREDA prepares short-, medium- and long-term plans to meet the targets set by the Government through its policy. It monitors all renewable energy programmes and activities imple-

mented by public and private entities. SREDA innovates financing and incentive mechanisms for renewable energy projects. Up to April 2022, they have managed to install 787.67 MW

In addition, the policy aimed to advocate for solar installation in off-grid and remote areas **through the use of the Solar Home System (SHS) Programme. To reach this Infrastructure Development Company Limited (IDCOL) was formed in 2003, whereby January 2019 the programme has supplied solar electricity to 18 million people i.e., 12% of the country's total population** who previously used kerosene lamps for lighting purposes.

The case study shows the role that can be played by implementing a stand-alone renewable energy policy and strategy accompanied by a proper institutional framework. For further demonstration, a case study of the Rural Energy Agency is used to show its role in promoting rural electrification

A Case study on Tanzania's Rural Energy Agency (REA)

How focused stand-alone strategies can break gatekeeping barriers

Another case study showing the role of a standalone strategy or programme is the achievement of rural electrification in Tanzania. To address rural electrification, among the initiatives taken were the formulation of the Rural Energy Agency as an institutional body leading the process and the **National Rural Electrification Program (2013–2022)**.

The main functions of REA are the following.

- Promote, stimulate, facilitate and improve modern energy access for productive uses in rural areas to stimulate rural economic and social development.
- Promote rational and efficient production and use of energy and facilitate identification and development of improved energy projects and activities in rural areas.
- Finance eligible rural energy projects through REF.
- Prepare and review application procedures, guidelines, selection criteria, standards and terms and conditions for grant allocation.
- Building ability and supply technical aid to project developers and rural communities.
- Facilitate preparation of bid documents for rural energy projects.

Fourteen years since its establishment, the Rural Energy Agency (REA) has revealed that it has achieved giving access to electricity to 69.6 per cent of rural mainland Tanzania by 2020. The achievement exceeds the 50 per cent target that the government agency had planned.

Policy Recommendations

Fast-track phase-out of fossil fuel and fast-track 100 % RE

The government and its stakeholders are strongly encouraged to formulate a renewable energy strategy with the following roles among others, setting the big picture, creating an institutional framework, assigning priorities and aligning policies. For an actionable strategy objective, indicators, action plan, resource mobilization, stakeholder engagement and M&E have to be part of it. The development of the strategy should be informed by the best available knowledge and science. Therefore, it should be based on a participatory stakeholder process including the knowledge of relevant stakeholders (private sector, CSOs, Academia research, development partner, LGA, and local communities) The process of developing a standalone RE strategy should be led by the Ministry of Energy (MoE) in close collaboration with the Vice President Office (VPO, responsible for environmental policy). The realization of the standalone strategy should lead by a focal point reflecting on best-practice from REA and SREDA.

Research showed that 100 % RE is possible for Tanzania & a phase-out of fossil fuel production is necessary for a just and livable future limiting global warming to 1.5 °C. Therefore, a stand-alone Re strategy must be built on two key goals: **Fast-track phase-out fossil fuels and fast-track 100 % RE.**

Pathways for the energy transition: Sectoral targets and indicators

The strategy needs to develop a science-based and cost-effective pathway for fossil fuels phase-out (use & production) and science-based pathways for a fast-tracked energy transition to 100 % RE. Based on the scenarios the Policy must define annual sectoral targets and indicators to monitor the progress of these indicators. Following this process the transition pathways have to be mainstreamed into other national planning scenarios and be considered in the review of key national strategies (e.g., NYFDP, NCCRS, PSMP). For best results, the following are required

A) Action Plan

To be actionable the strategy must define an action plan with activities and programs to achieve the set targets. The action plan should be informed by a participatory stakeholder process and include a stakeholder mapping of relevant actors to realize the strategy.

B) Resource mobilization plan

A participatory assessment of needed resources for the realization of the strategy should inform an analysis of potential mobilizable resources to draft a resource mobilization plan. This ensures that sufficient resources are mobilized for the successful implementation of the strategy.

C) M&E

The goals, activities and indicators should be monitored constantly. To ensure fast progress and stay on track annual review and evaluation cycles should be conducted. The strategy should have a mechanism to integrate new activities into the strategy to fill gaps that are shown in the annual review. A solid M&E ensure learning-by-doing and application of the best available knowledge.

D) Stand-alone RE-Policy and framework

To guarantee legal security for investors and stakeholders and build an enabling policy environment a stand-alone RE Policy and supporting regulations as to be developed by policymakers and regulators. A robust policy & regulatory framework creates opportunities for the private sector to engage in the realization of a RE strategy

F) Focal Point

A focal point ensures the ability to coordinate the effective realization of the stand-alone RE strategy. It functions as a knowledge hub, centre for resource mobilization and coordination of stakeholders and activities. As the best practice of REA and SREDA show focal points are efficient in the realization of standalone strategies.