



16 October 2014

REGULATIONS DRIVING CLEAN ENERGY INVESTMENT

Santiago, Chile

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Bloomberg
NEW ENERGY FINANCE

PRODUCTS TO HELP YOU UNDERSTAND THE FUTURE OF ENERGY



Solar



Wind



Other
Renewables



Gas



Energy Smart
Technologies



Advanced
Transport



Carbon &
RECs Markets



Americas



Europe, Middle East
& Africa

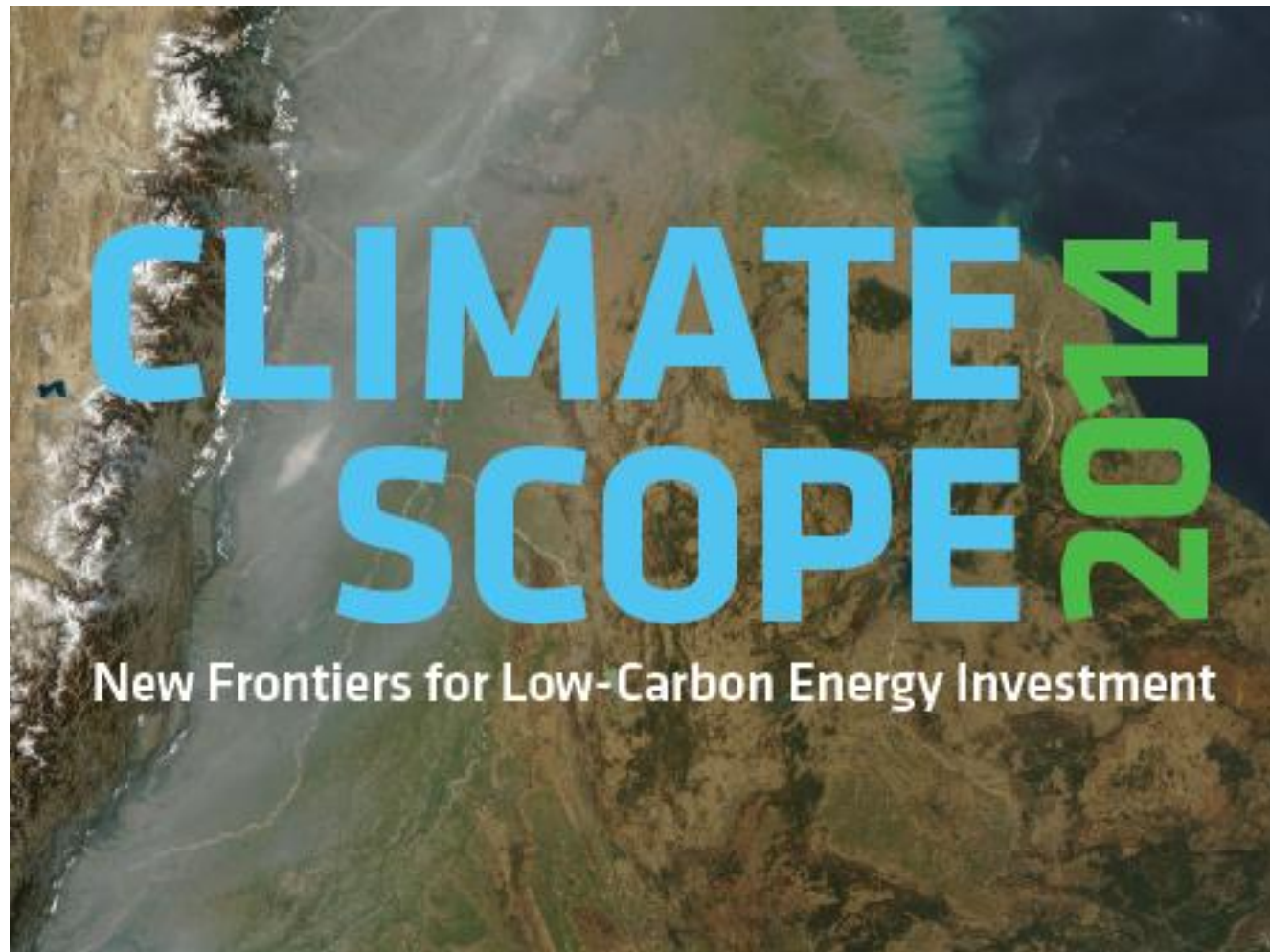


Asia Pacific

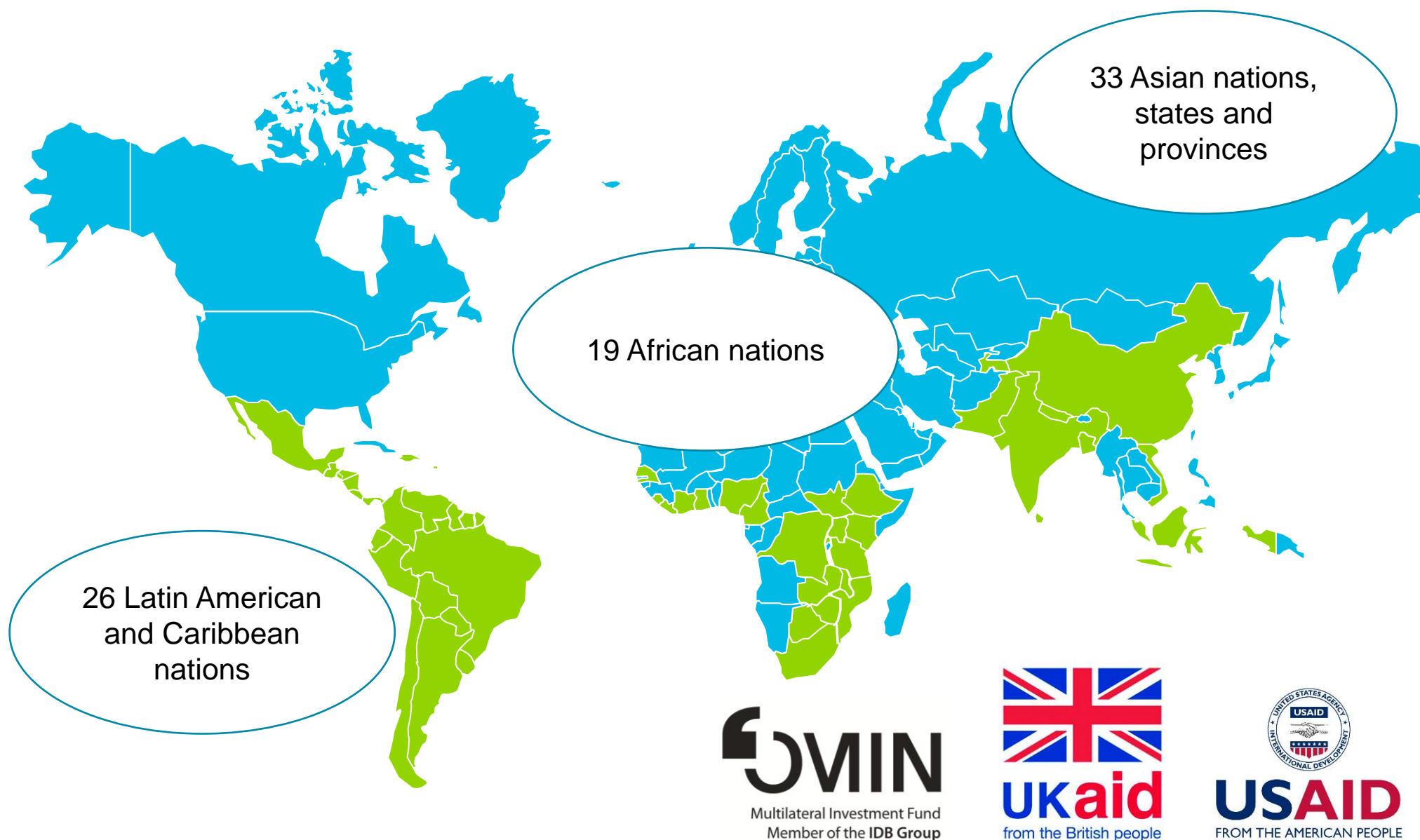
200 EXPERTS ACROSS SIX CONTINENTS



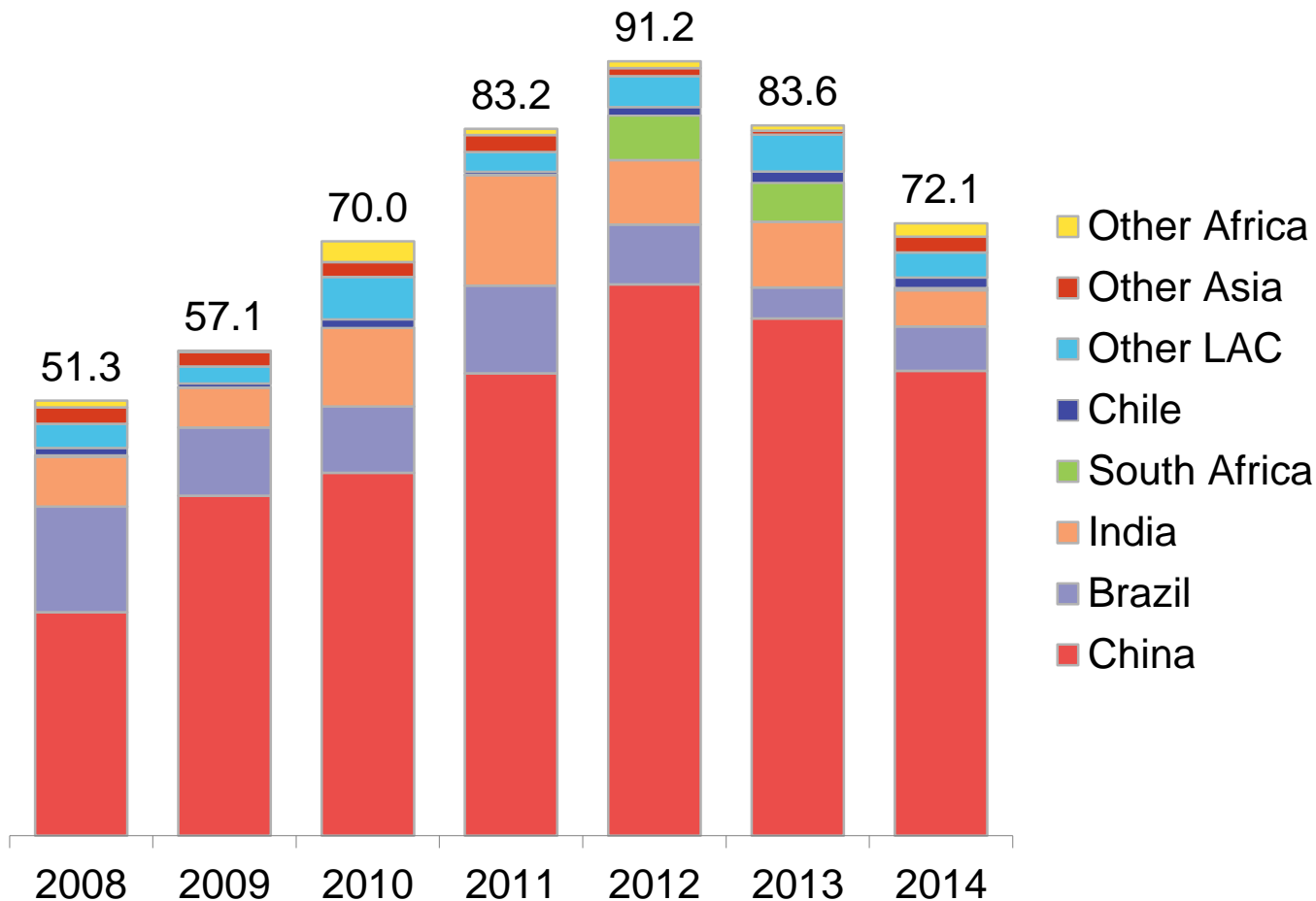
COMING SOON...



www.global-climatescope.org



CLIMATESCOPE COUNTRIES TOTAL NEW CLEAN ENERGY INVESTMENT, 2008-Q3 2014 (\$BN)



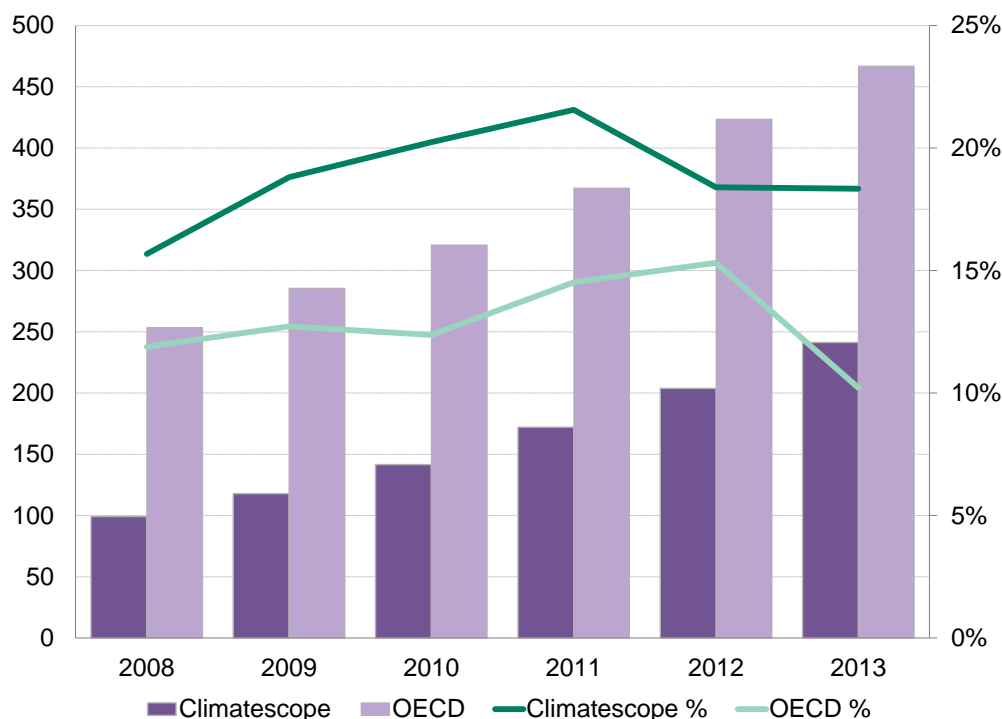
- In 2008, Climatescope countries represented 29% of global new clean energy investment (\$178.3bn). In 2013, they represented 41% of the total (\$205.8bn)

Note: Other Latin America includes Argentina, Barbados, Belize, Bolivia, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Trinidad & Tobago, Venezuela, Suriname. Other Sub-Saharan Africa includes Other Asia includes Bangladesh, Indonesia, Pakistan, Nepal, Vietnam.

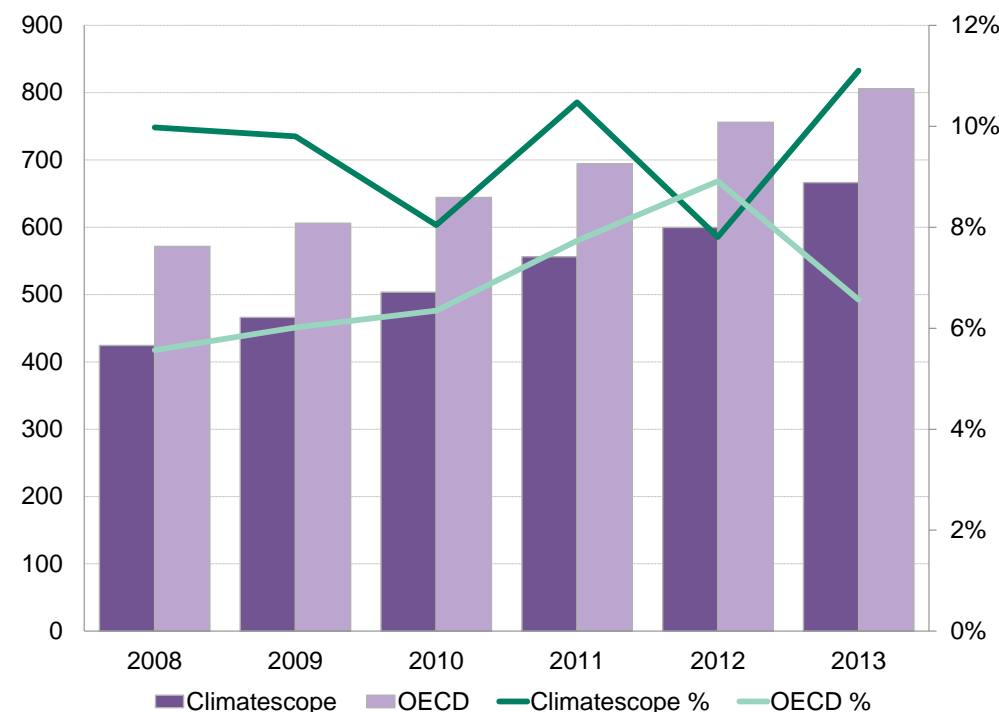
Source: Bloomberg New Energy Finance

CLEAN ENERGY CAPACITY (GW, %) CLIMATESCOPE AND OECD COUNTRIES, 2008-13

EXCLUDING LARGE HYDRO



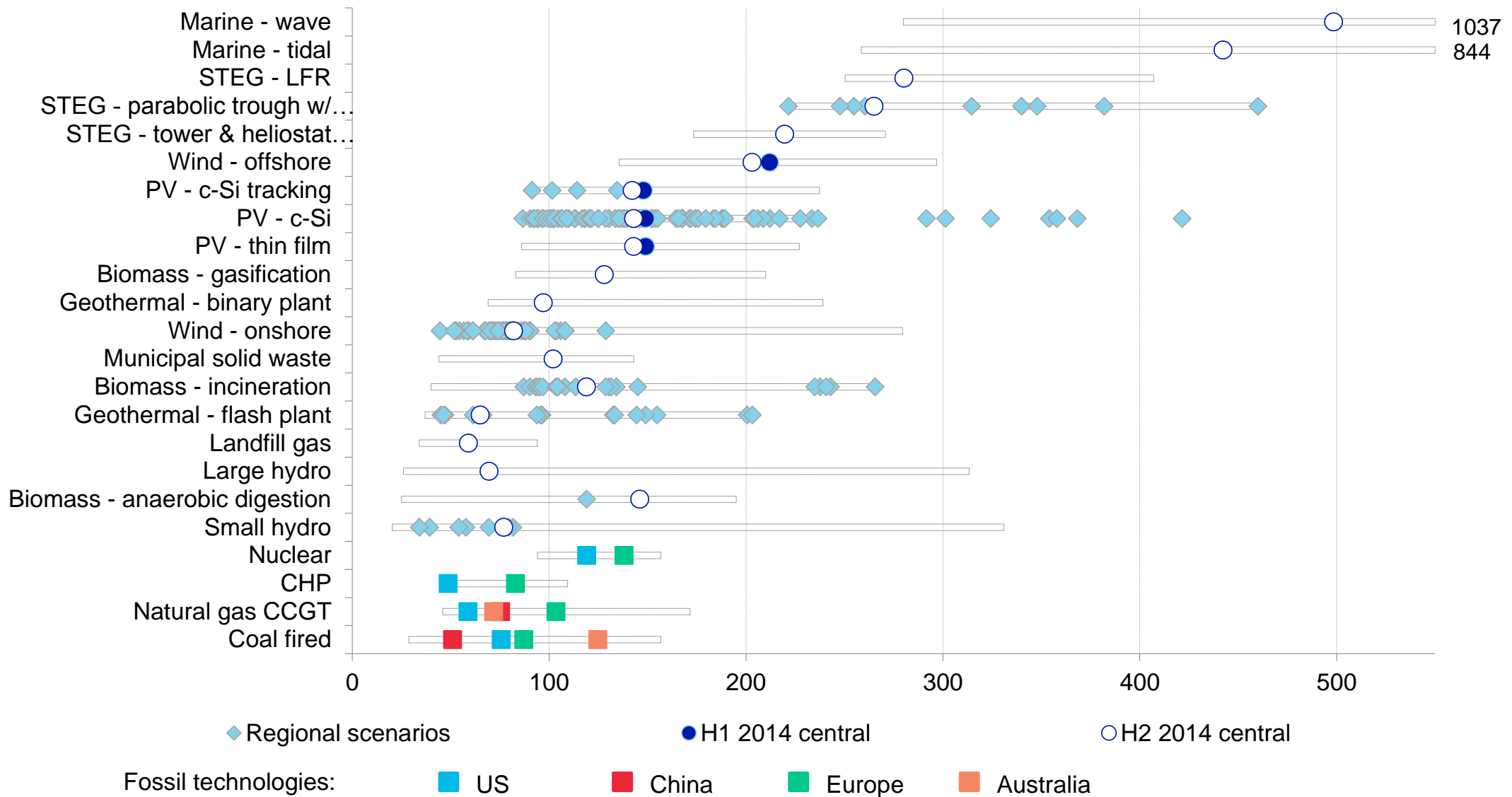
INCLUDING LARGE HYDRO



- New non-large hydro clean energy has been growing at a quicker clip in Climatescope countries (avg 18.8%/y) than in OECD countries (avg 12.8%/yr). In fact,
- In 2013 on a volume basis, Climatescope countries added nearly as much capacity (37GW) nearly as OECD nations (43GW).
- Counting large hydro, Climatescope nations now have 666GW installed capacity compared to 806GW in OECD countries.

Source: Bloomberg New Energy Finance

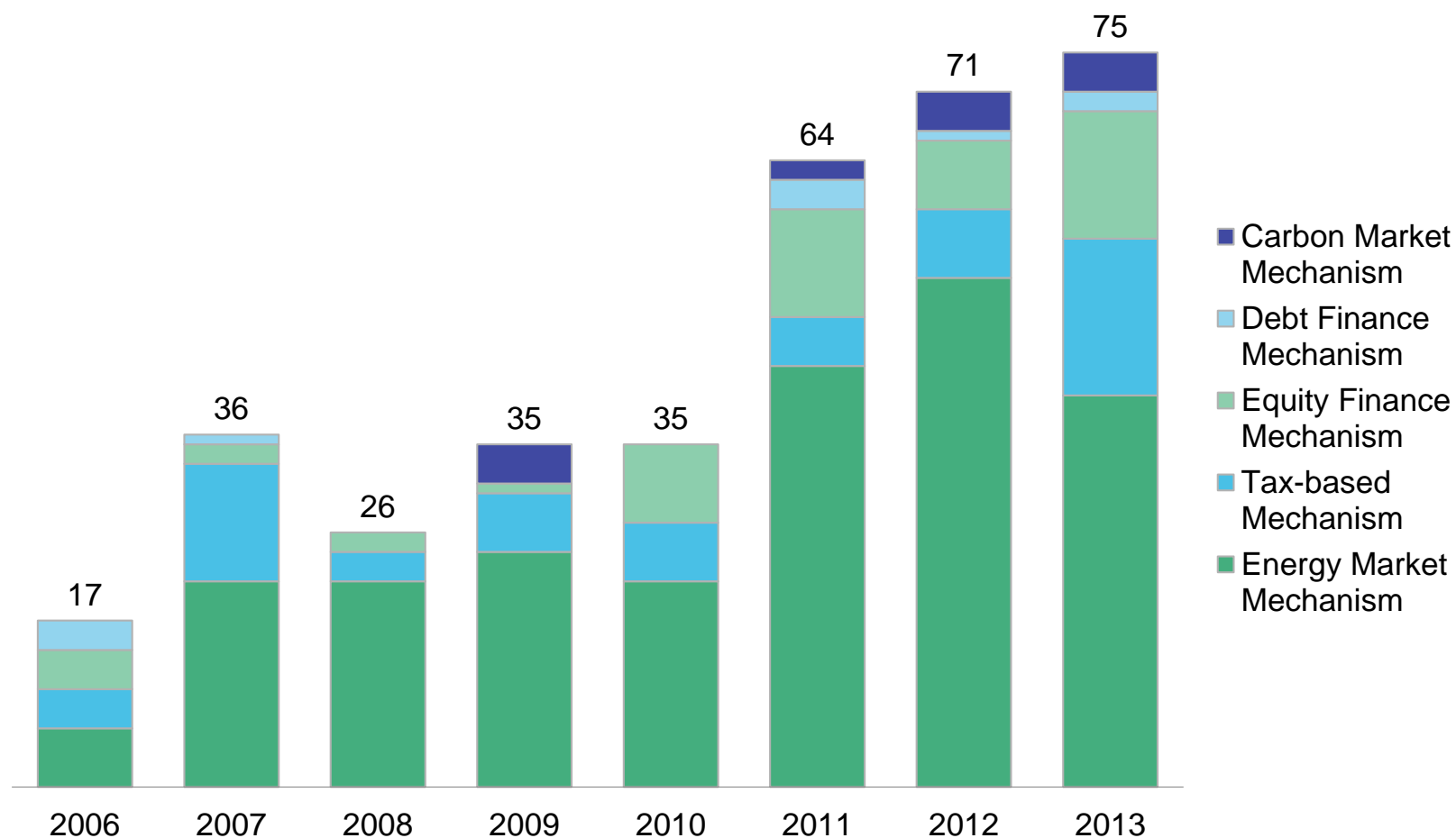
H2 2014 LEVELISED COST OF ELECTRICITY, CENTRAL AND REGIONAL SCENARIOS (\$/MWH)



Note: carbon prices note included for fossil fuel LCOEs.

Source: Bloomberg New Energy Finance

CLIMATESCOPE COUNTRIES POLICY ADDITIONS PER YEAR



Key Policies:

Targets

Auctions

Feed-in Tariffs

Tax incentives

Debt/equity finance incentives

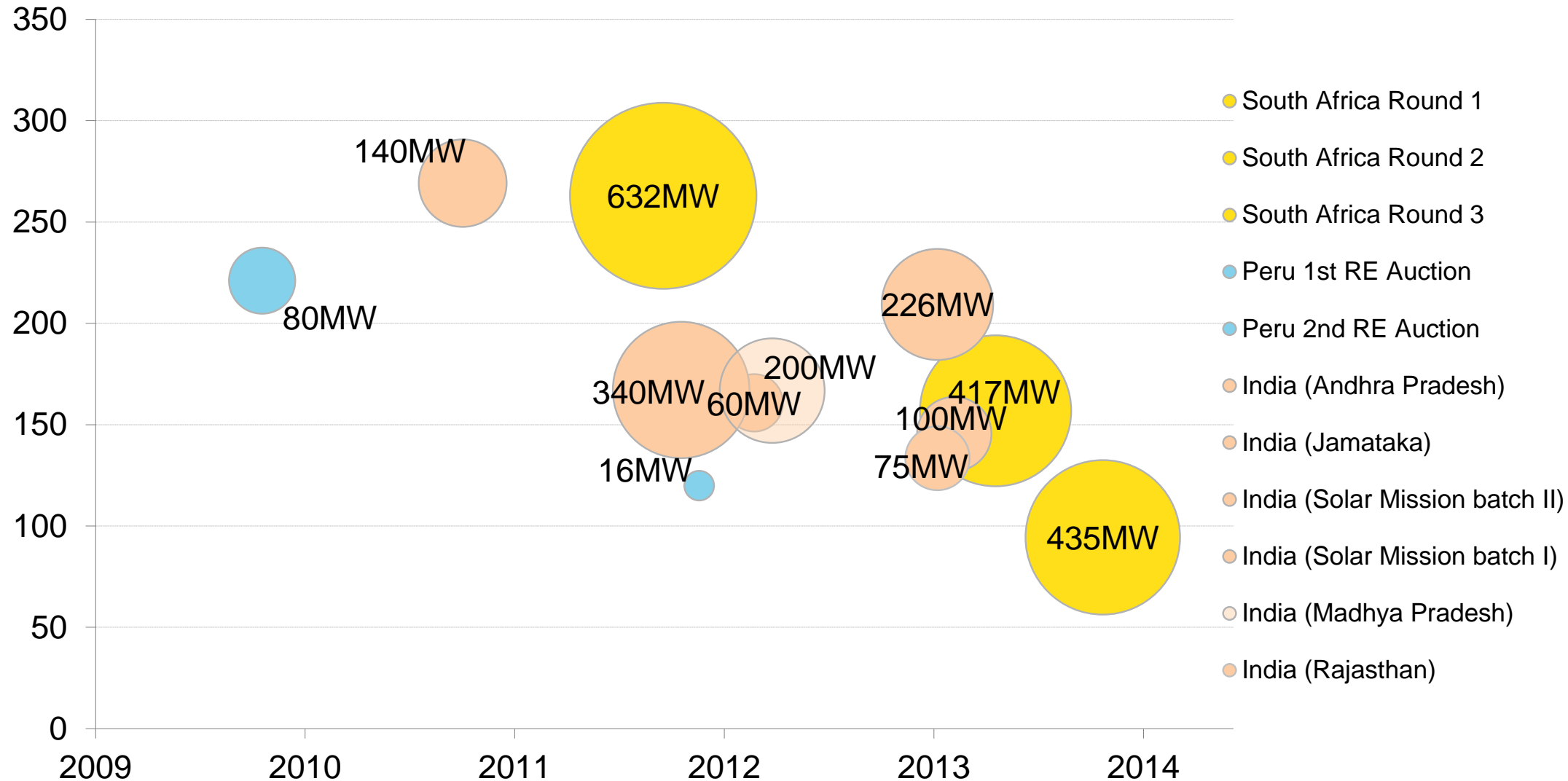
Net metering (dist)

Mini-grid regulations (dist)

Source: Bloomberg New Energy Finance

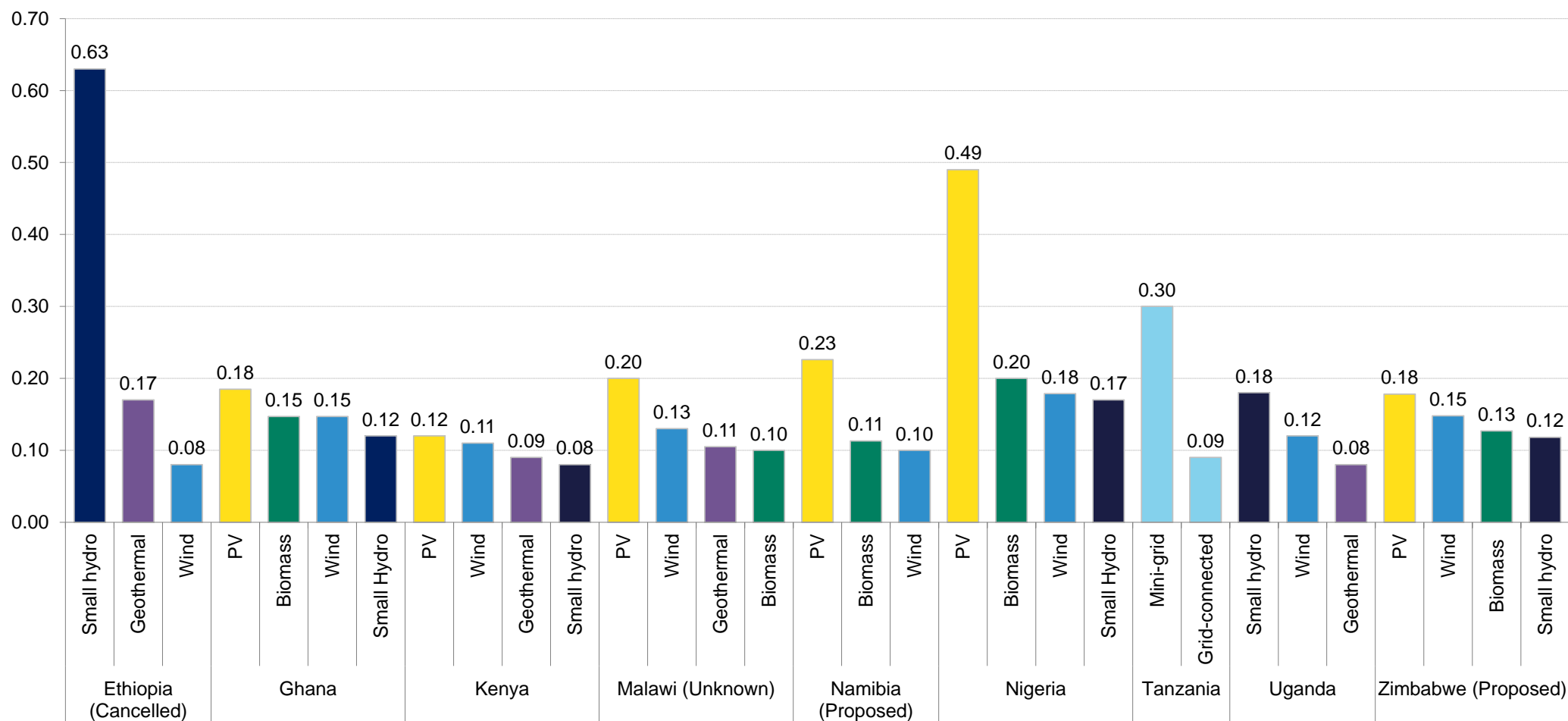
SOLAR AUCTION IN SOUTH AFRICA, PERU, INDIA, 2009–13, MW (\$/MWh)

Price (\$/MWh)



Source: Bloomberg New Energy Finance

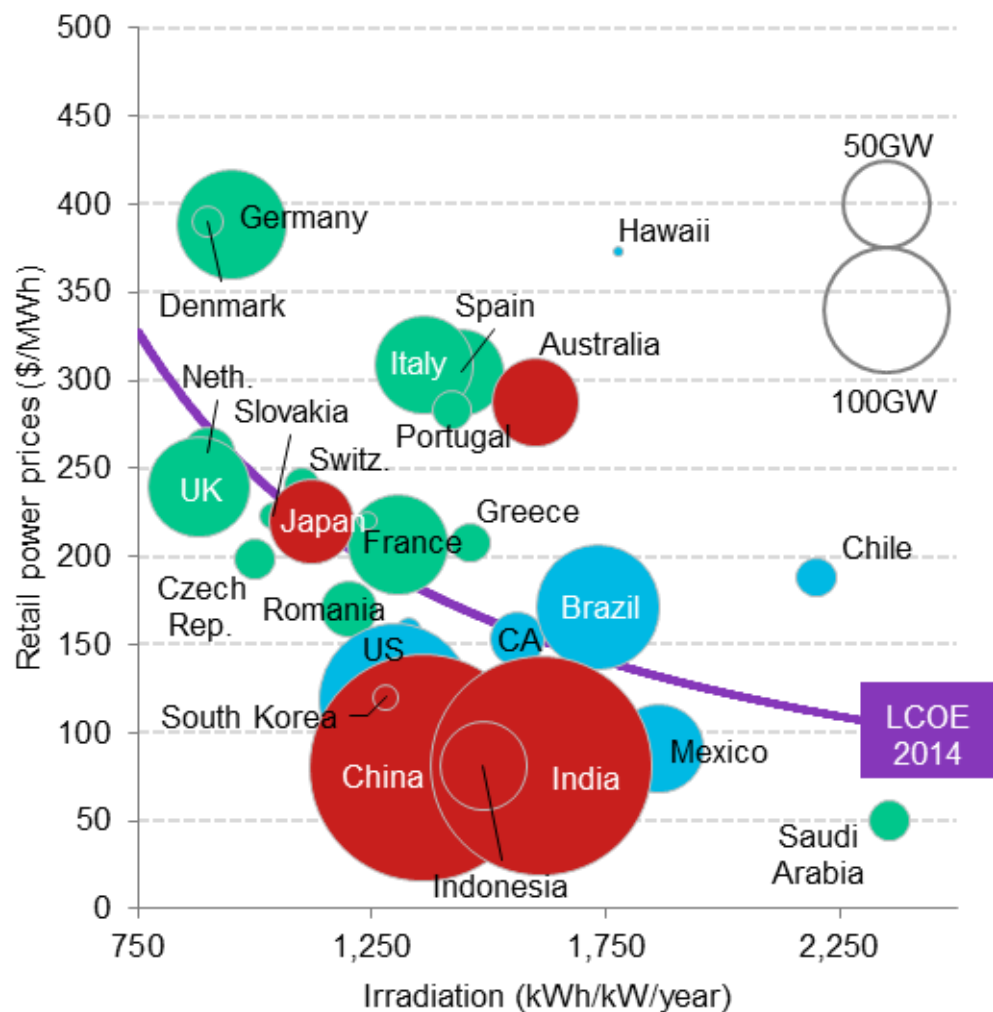
AFRICA: FEED-IN TARIFFS (\$/W)



Source: Bloomberg New Energy Finance

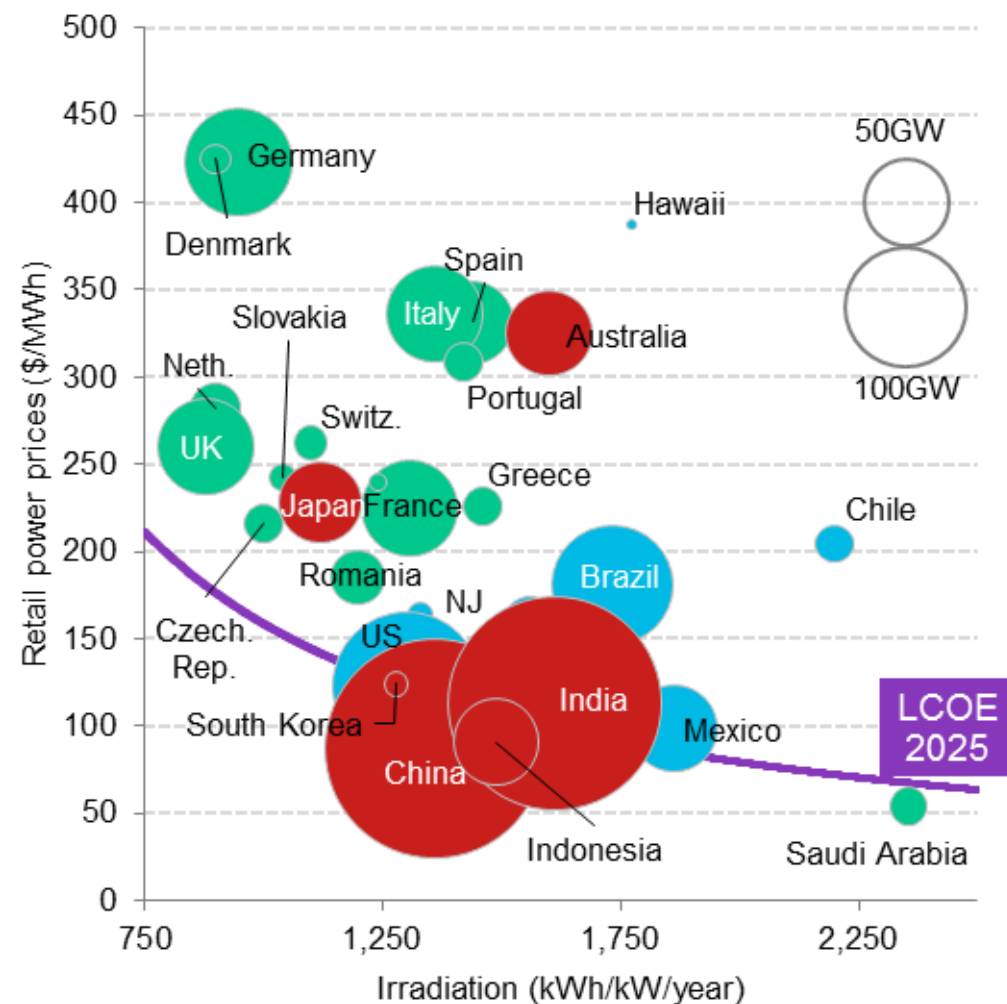
GLOBAL RESIDENTIAL-SCALE PV SYSTEM ECONOMICS

2014



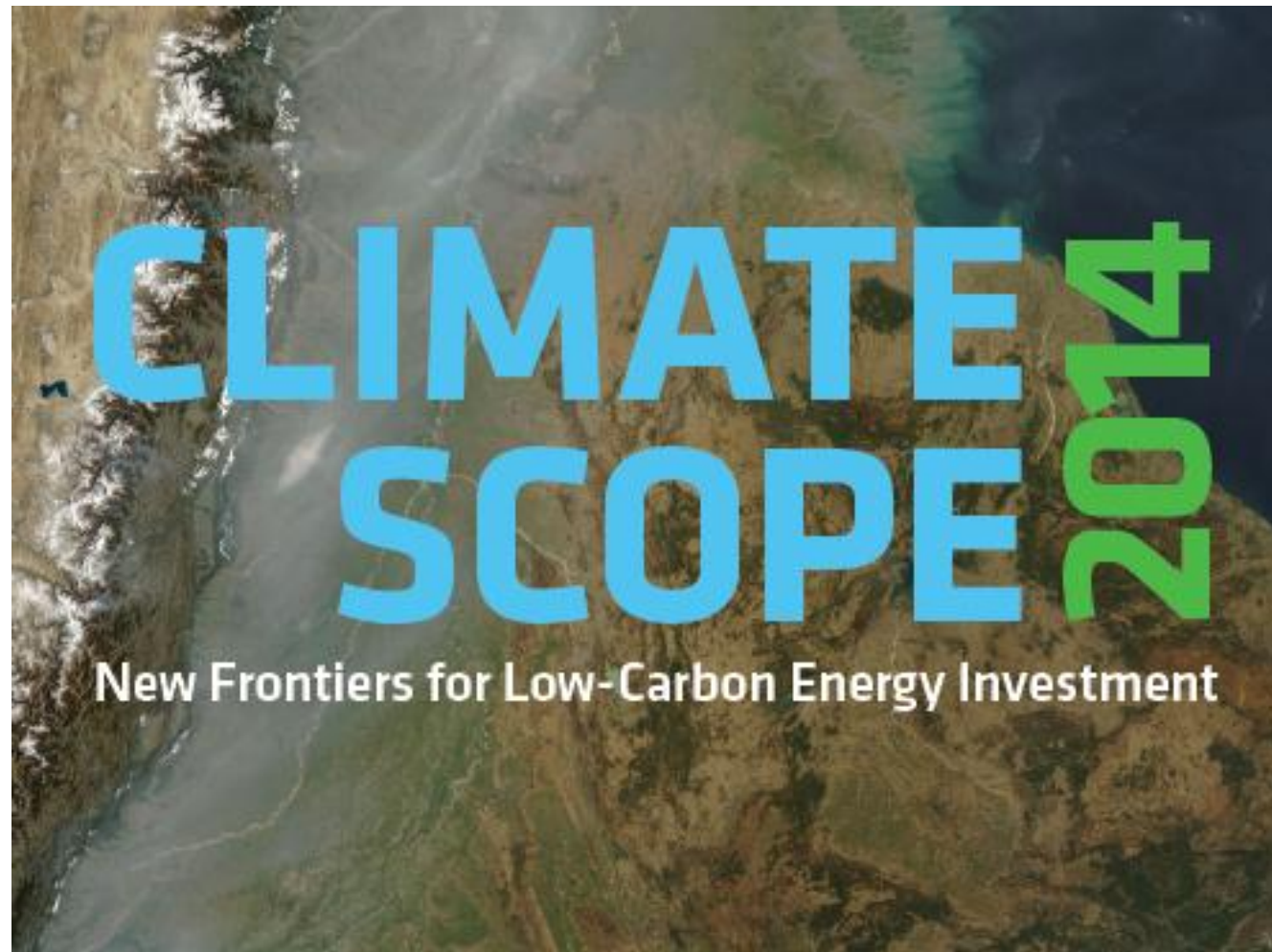
Note: NJ, New Jersey; CA, California. Source: Bloomberg New Energy Finance

2025



Note: NJ, New Jersey; CA, California. Source: Bloomberg New Energy Finance

COMING SOON...



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