

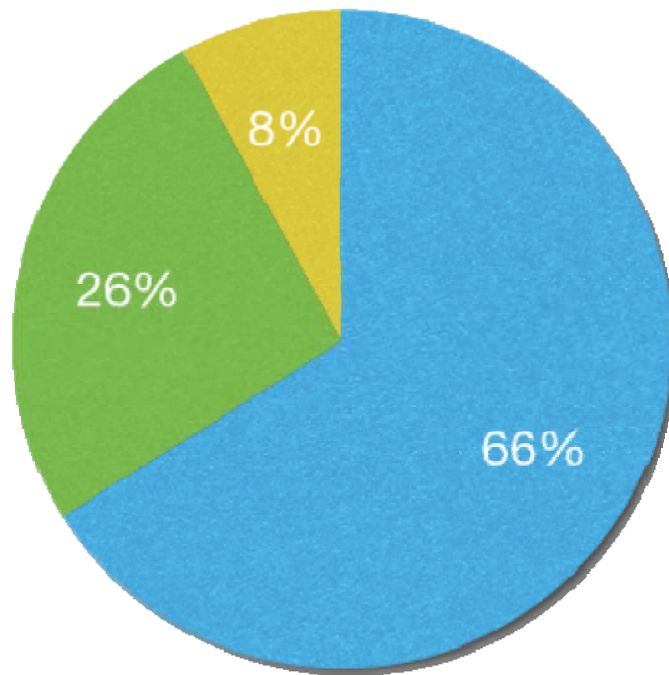


Grounding Green Power

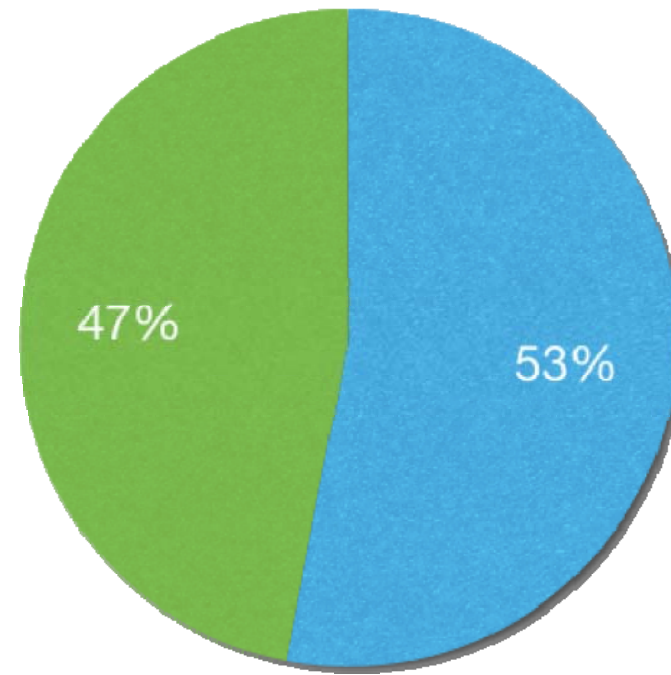
Developing Countries and Donors in the Renewable Energy Transition

Clifford Polycarp, Senior Associate

● Fossil Fuels ● Renewables ● Nuclear



Total World Electricity Capacity
by Source | 2009



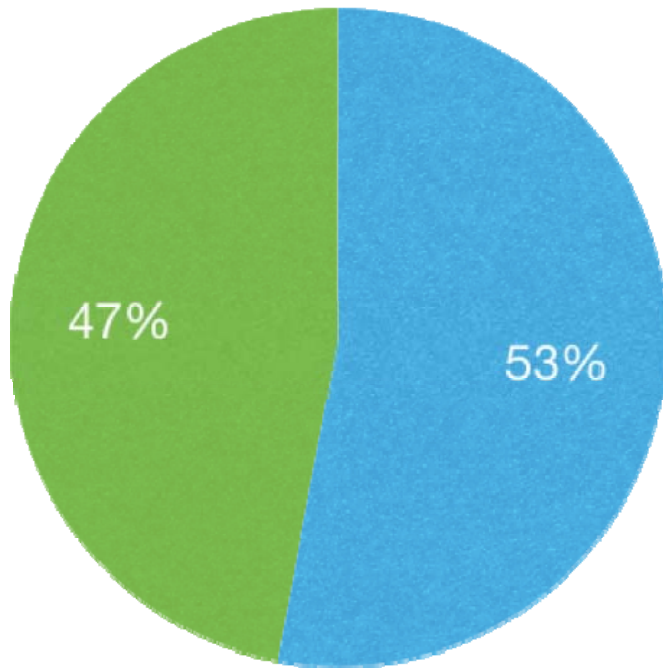
New Electricity Capacity Added
Worldwide by Source | 2008-2009

Renewables are Growing
New capacity is likely to outpace fossil fuels

Source: *Renewables 2010 Global Status Report*. REN 21, Paris.

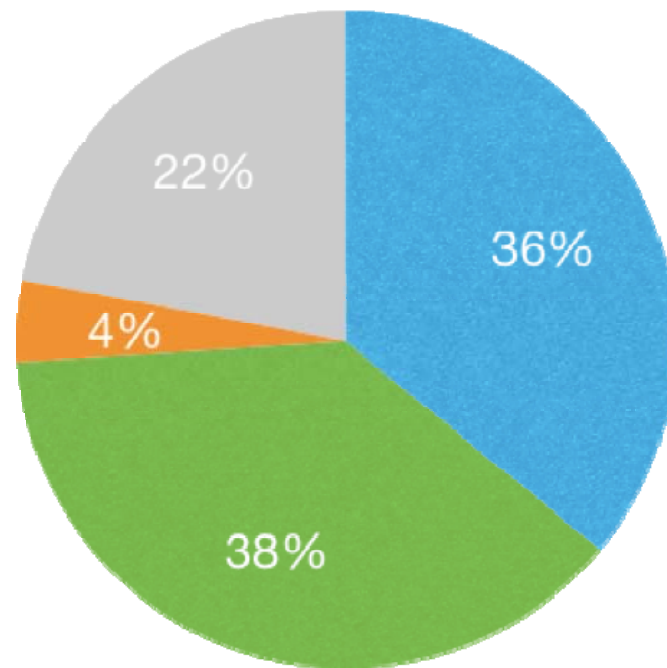
* Renewables include large hydropower.

● Developing Countries
● Others



Current Renewable Electricity Capacity

● Developing Country Fossil
● Developing Country Renewables
● Developing Country Nuclear
● Other



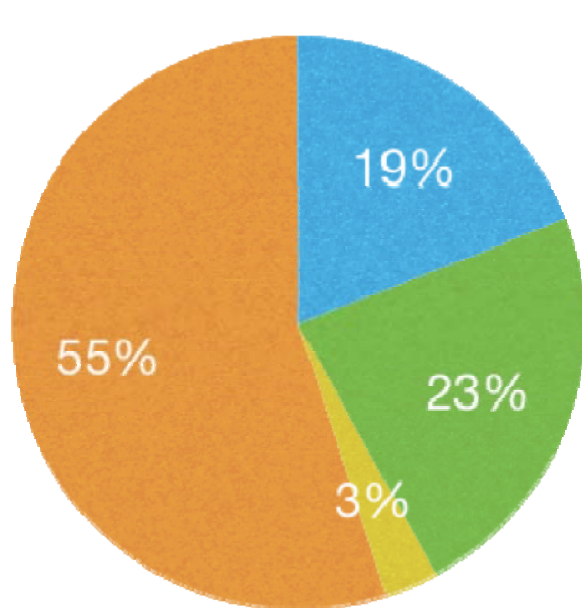
Projected New Capacity
2008-2035 (GW)

Developing Countries are at the Forefront

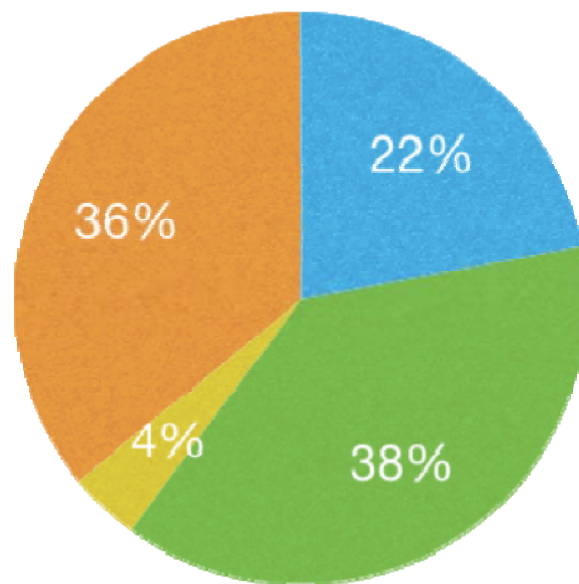
78% of total new capacity will be in developing countries. Renewables will be the largest share.

Sources: IPCC Special Report on Renewable Energy Sources and IEA World Energy Outlook 2010 New Policy Scenario.

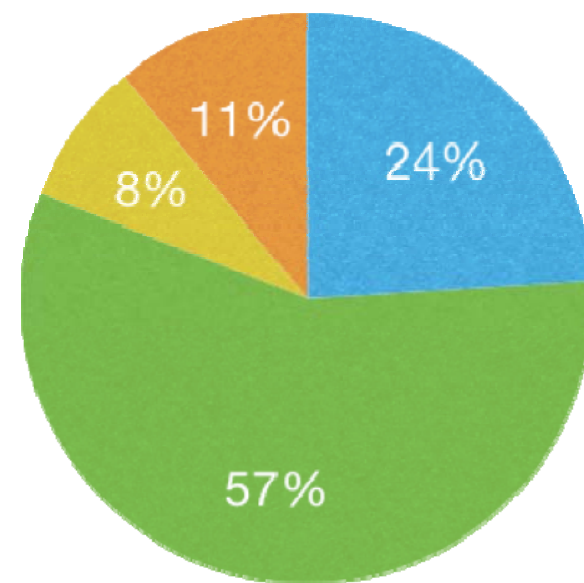
● OECD Countries - All electricity sources ● Renewables ● Nuclear ● Fossil Fuels



Current Policy Scenario



New Policy Scenario



450 Scenario

What is happening What needs to happen

Current Renewable Deployment is Insufficient

We're scaling up but we need to scale up faster.

Source: IEA World Energy Outlook 2010.



Brazil, India, Indonesia, Kenya, Mexico, Morocco, Mozambique, South Africa, Sri Lanka, Philippines, Tanzania, Thailand

Foundations for Our Analysis
Developing country experience



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Smart Renewable Energy Policy

Moving from crises to opportunity

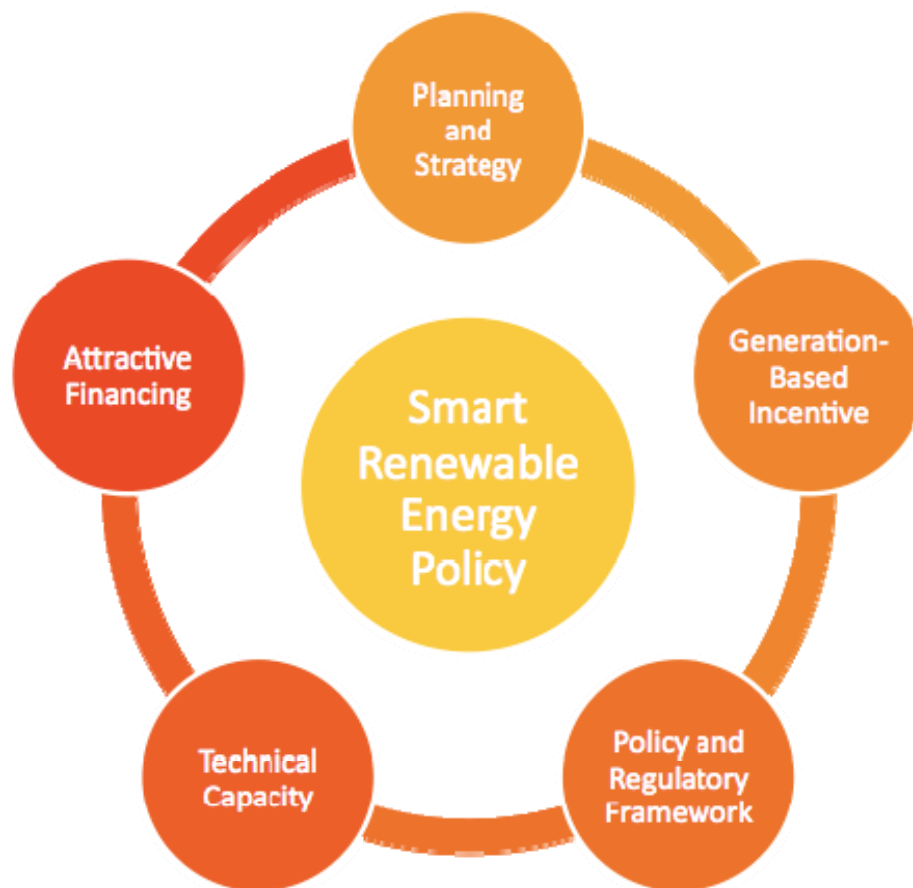
- Clear Objectives
- Comprehensive Approach
- Private Investment Leverage
- Cost-Effectiveness
- Innovation
- Transparency, Accountability, Participation





What is Smart Renewable Energy Policy in Developing Countries?

- Planning and Strategy
- Generation Based Incentives
- Policy and Regulatory Framework
- Technical Capacity
- Attractive Financing





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A Window of Opportunity

The moment for smart policy support

- New Green Climate Fund
- World Bank Energy Strategy
- U.S. Government's Investing in Clean Energy Strategy
- Norway's Energy+ Partnership
- Germany's International Climate Initiative





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