OECD GREEN GROWTH & SUSTAINABLE DEVELOPMENT

PARIS

5 DECEMBER 2013

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Bloomberg New Energy Finance

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GLOBAL TOTAL NEW INVESTMENT IN CLEAN ENERGY 2004–12 ($BN)

$269bn

Source: Bloomberg New Energy Finance

Note: Includes corporate and government R&D, and small distributed capacity. Adjusted for re-invested equity. Does not include proceeds from acquisition transactions

Source: Bloomberg New Energy Finance
NEW INVESTMENT IN CLEAN ENERGY
Q1 2004–Q2 2013 ($BN)

Note: Total values include estimates for undisclosed deals. Excludes corporate R&D, government R&D, digital energy asset investment and energy storage asset investment (only available annually).

Source: Bloomberg New Energy Finance
NEW INVESTMENT IN CLEAN ENERGY IN THE US
Q1 2004–Q2 2013 ($BN)

Note: Total values include estimates for undisclosed deals. Excludes corporate R&D, government R&D, digital energy asset investment and energy storage asset investment (only available annually).

Source: Bloomberg New Energy Finance
NEW INVESTMENT IN CLEAN ENERGY IN EUROPE
Q1 2004–Q2 2013 ($BN)

Note: Total values include estimates for undisclosed deals. Excludes corporate R&D, government R&D, digital energy asset investment and energy storage asset investment (only available annually).

Source: Bloomberg New Energy Finance

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05 December 2013
NEW INVESTMENT IN CLEAN ENERGY IN CHINA
Q1 2004–Q2 2013 ($BN)

Four quarter running average

Source: Bloomberg New Energy Finance
Note: Total values include estimates for undisclosed deals. Excludes corporate R&D, government R&D, digital energy asset investment and energy storage asset investment (only available annually)
NORTH-SOUTH DEVELOPMENT BANKS CLEAN ENERGY INVESTMENT 2007-2012 ($M)

Source: Bloomberg New Energy Finance
GLOBAL RENEWABLE CAPACITY ADDITIONS, EXCLUDING HYDRO (GW)

Note: “Other renewables” includes marine and geothermal power only.

Source: Bloomberg New Energy Finance
NEX CLEAN ENERGY INDEX 2013 YTD

Source: Bloomberg New Energy Finance

Note: Values as of 10 October 2013; NASDAQ and S&P 500 rebased to 100 on 01 Jan 2013.
DEVELOPMENT BANK BROAD CLEAN ENERGY INVESTMENT ($BN)

Source: Bloomberg New Energy Finance
COPENHAGEN GGGF OBSERVATIONS

1. Green infrastructure investment works
   • Lots of best practice at the project level
   • Driven by the development banking community
   • Insufficient attention / mechanisms for distributed solutions

2. Cannot finance $trillion(s) worldwide per year by “building a better biplane”

3. Bring green infrastructure opportunities to mainstream investors
   • Lots of focus on risk mitigation mechanisms
   • Not enough focus on reducing risk in the first place (policy risk)
   • Development finance community needs to be more of an originator, not a balance sheet

4. Bring mainstream investors to green infrastructure
   • Price in externalities (not just carbon!)
   • Eliminate barriers (not just in energy policy)
   • Improve risk understanding

Source: Bloomberg New Energy Finance
Finance for Resilience
Subscription-based news, data and analysis to support your decisions in clean energy, power and water and the carbon markets

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THANK YOU!

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Carbon Markets
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Carbon Capture & Storage
Power
Water
Nuclear
Gas

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