A photograph of four white wind turbines in a field under a blue sky with clouds. A large yellow diagonal stripe runs from the top right towards the center. On the left, there is a faint, stylized graphic of a city or network with labels like 'CLEAN TECH' and 'INNOVATION'.

# Global renewable energy country attractiveness and resource map

Global Cleantech Center  
November 2013



Building a better  
working world



## Global renewable energy country attractiveness and resource map





To provide a global view of the renewable energy landscape, the following maps present renewable attractiveness and resource data on the 40 countries that are included in EY's Renewable Energy Country Attractiveness Index (RECAI).

The RECAI ranks the attractiveness of 40 nations around the globe for investment in renewable energy generation infrastructure. Published since 2003, this widely quoted quarterly publication is an important reference for industry specialists and investors worldwide.

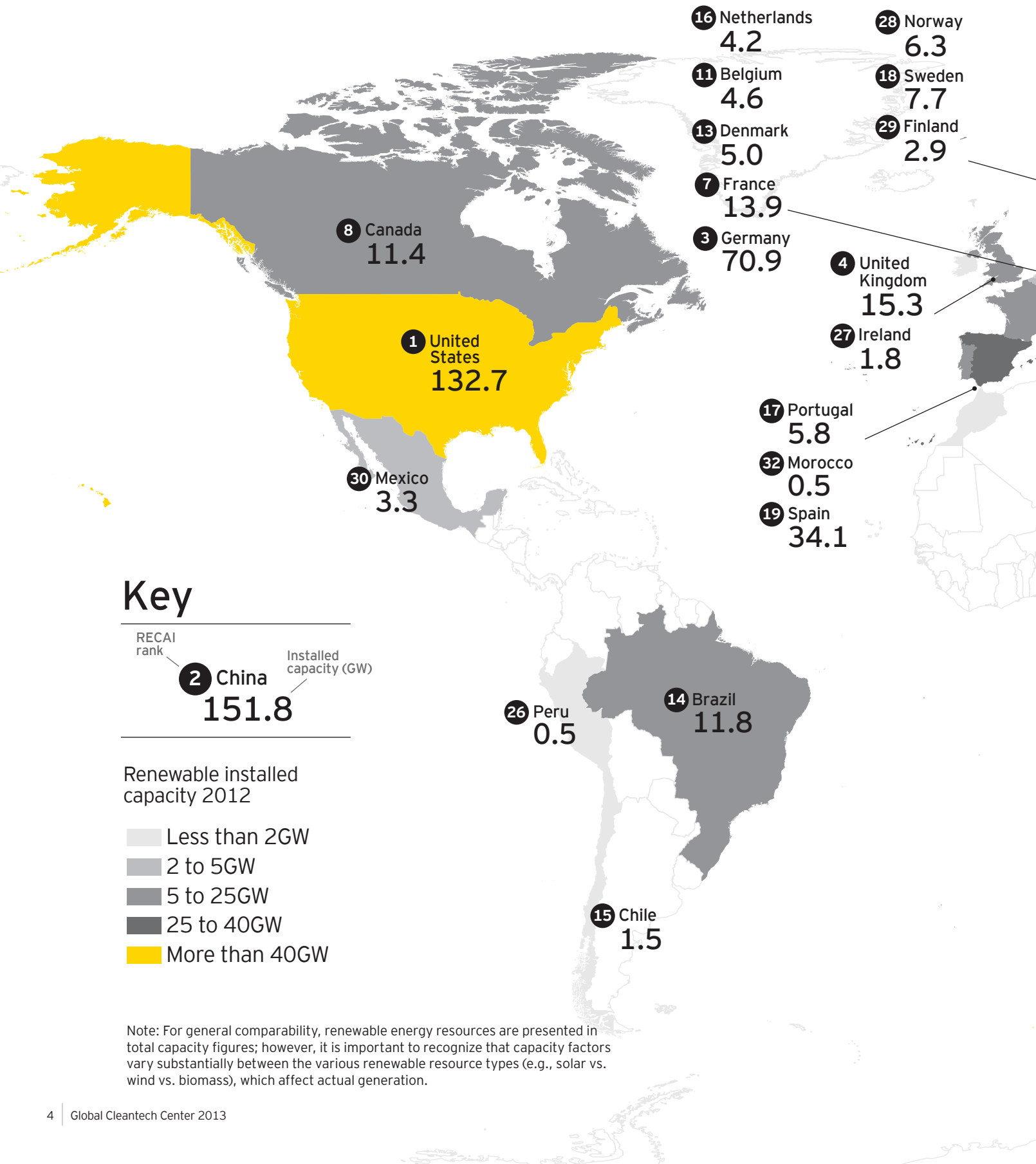
The maps indicate the overall RECAI country ranking and score as well as the RECAI technology-specific indices scores.

In addition, the maps indicate key baseline renewable resource data for each country, including installed renewable generation capacity, capacity growth rate, new project pipeline and percentage of electricity generated from renewable sources.

It is important to note that the overall and technology-specific RECAI scores are the product of a variety of weighted inputs related to the macroeconomic, energy market and renewable technology drivers in a given country.

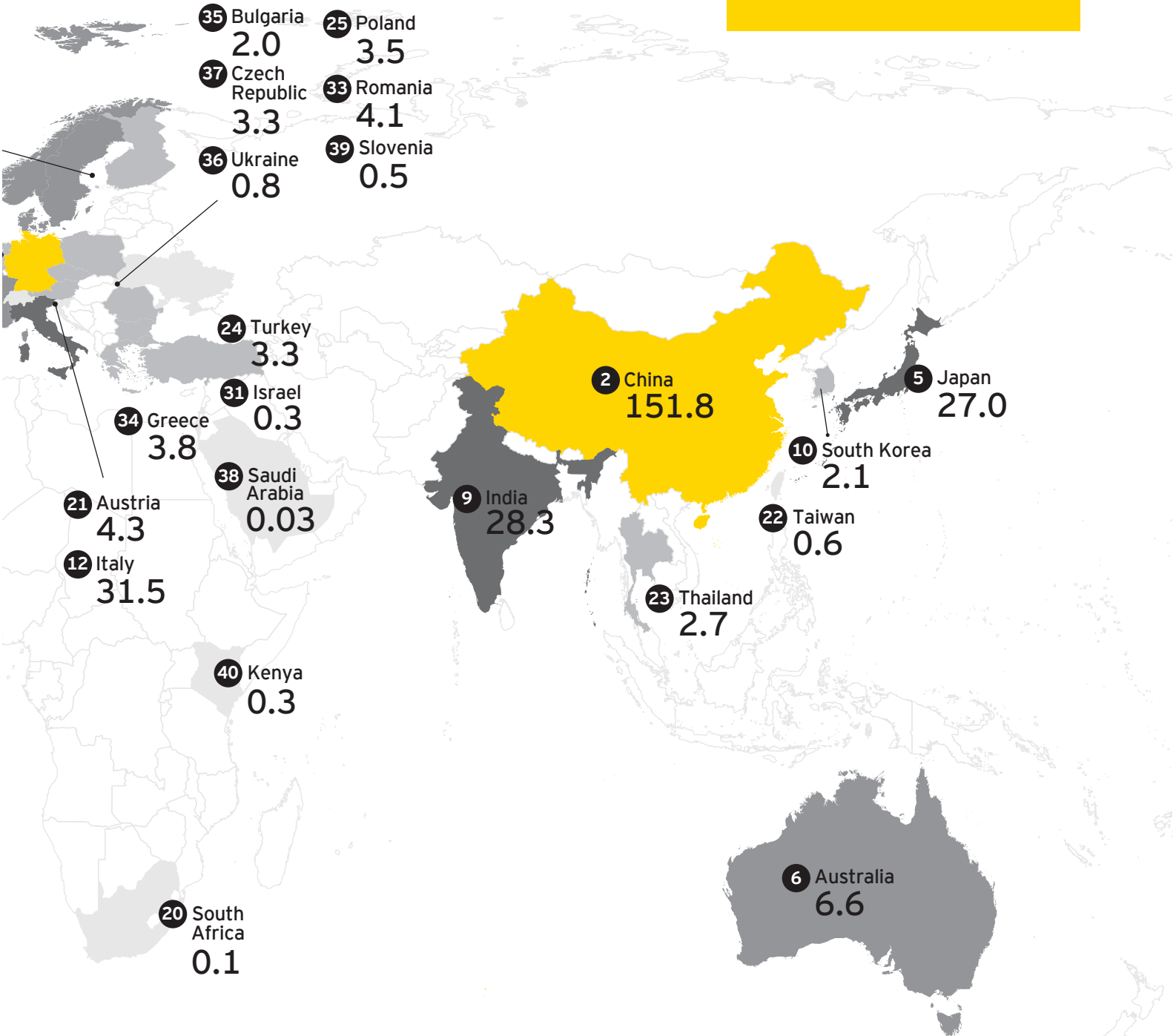
For more information on the index methodology, please contact Klair White, RECAI Editor, at [kwhite@uk.ey.com](mailto:kwhite@uk.ey.com).


# World



# Global

Installed capacity  
**612.6GW**  
Project pipeline  
**689.1GW**

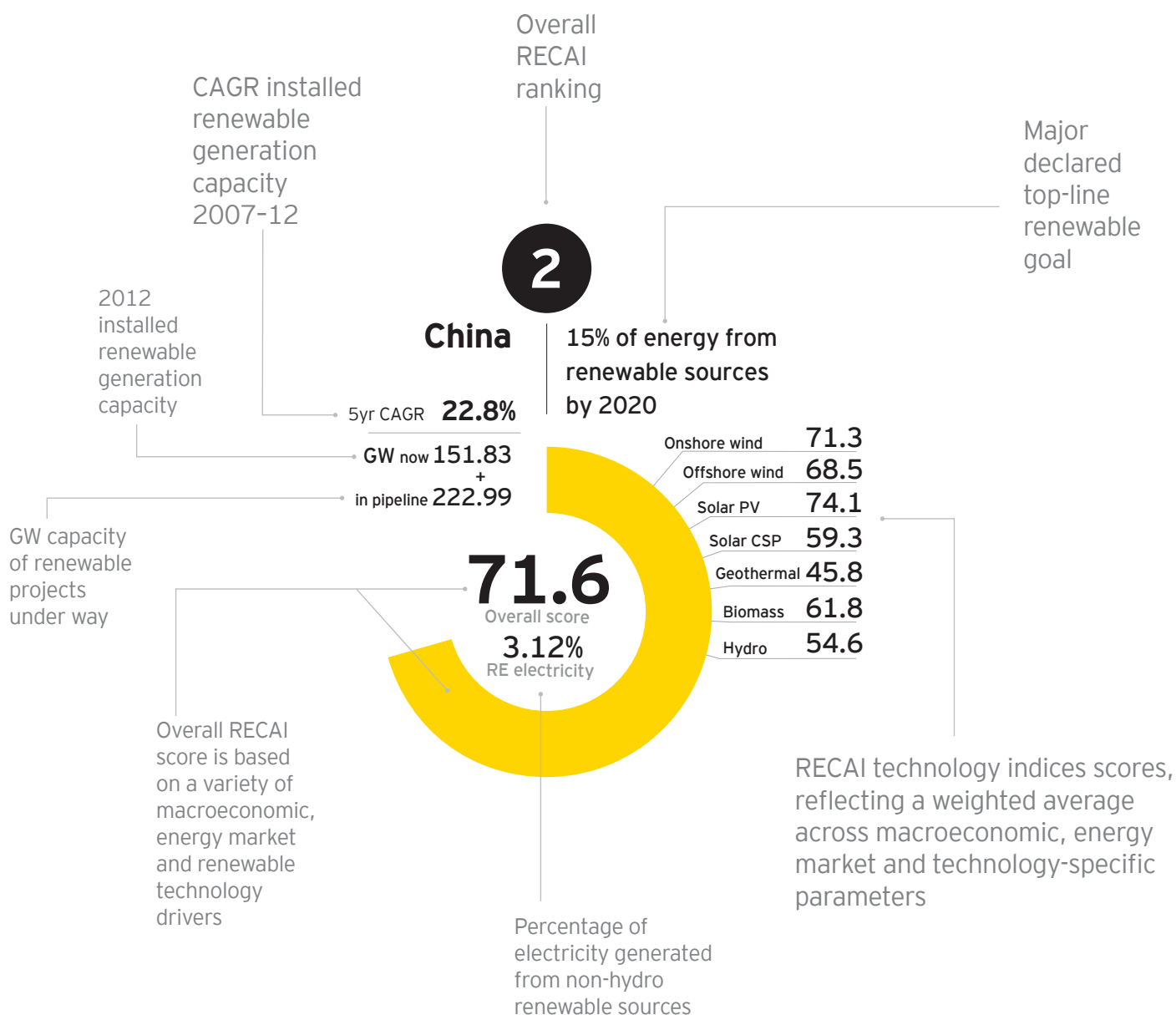




# Regional views and details



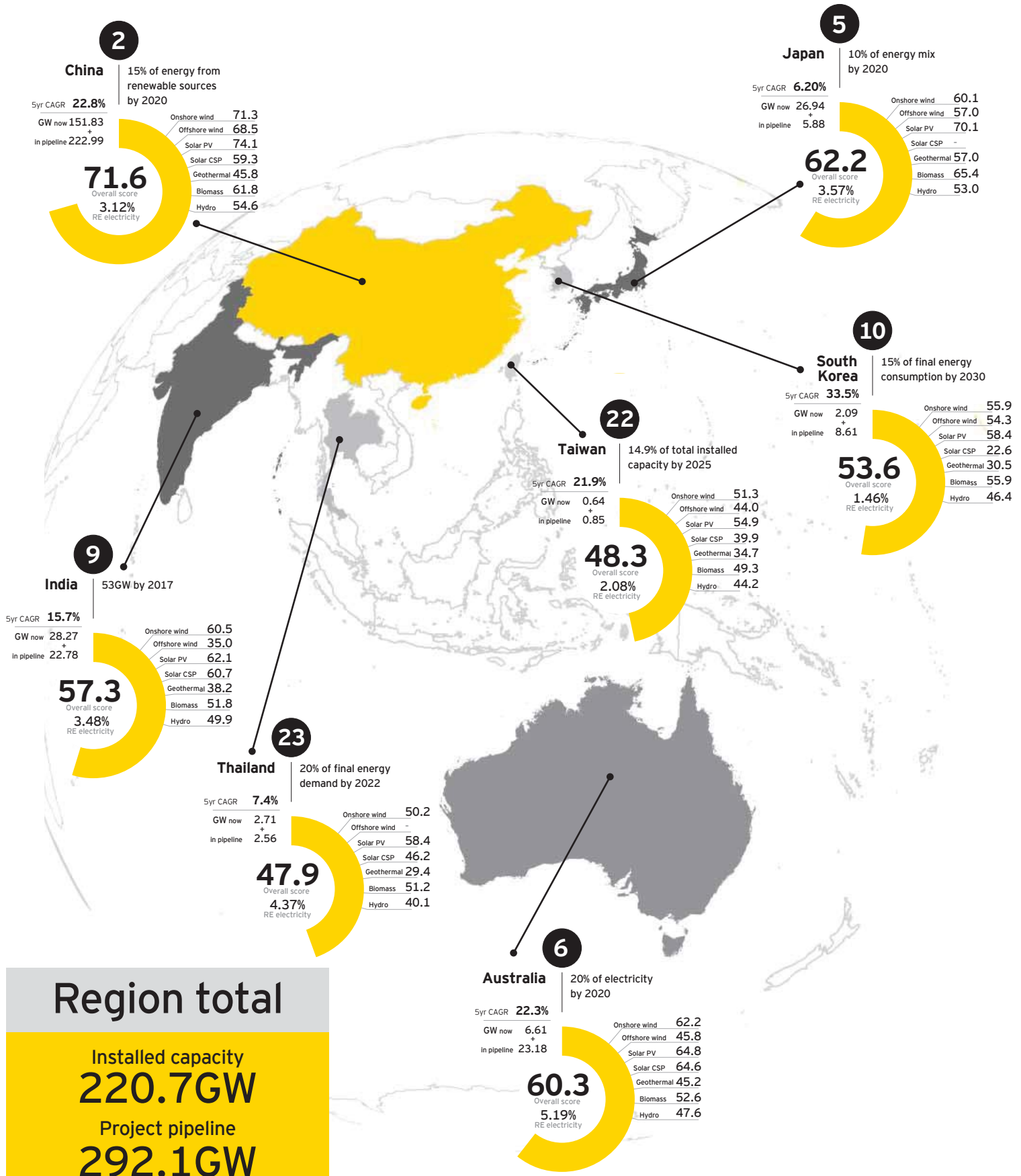
# Key



## Sources and data notes

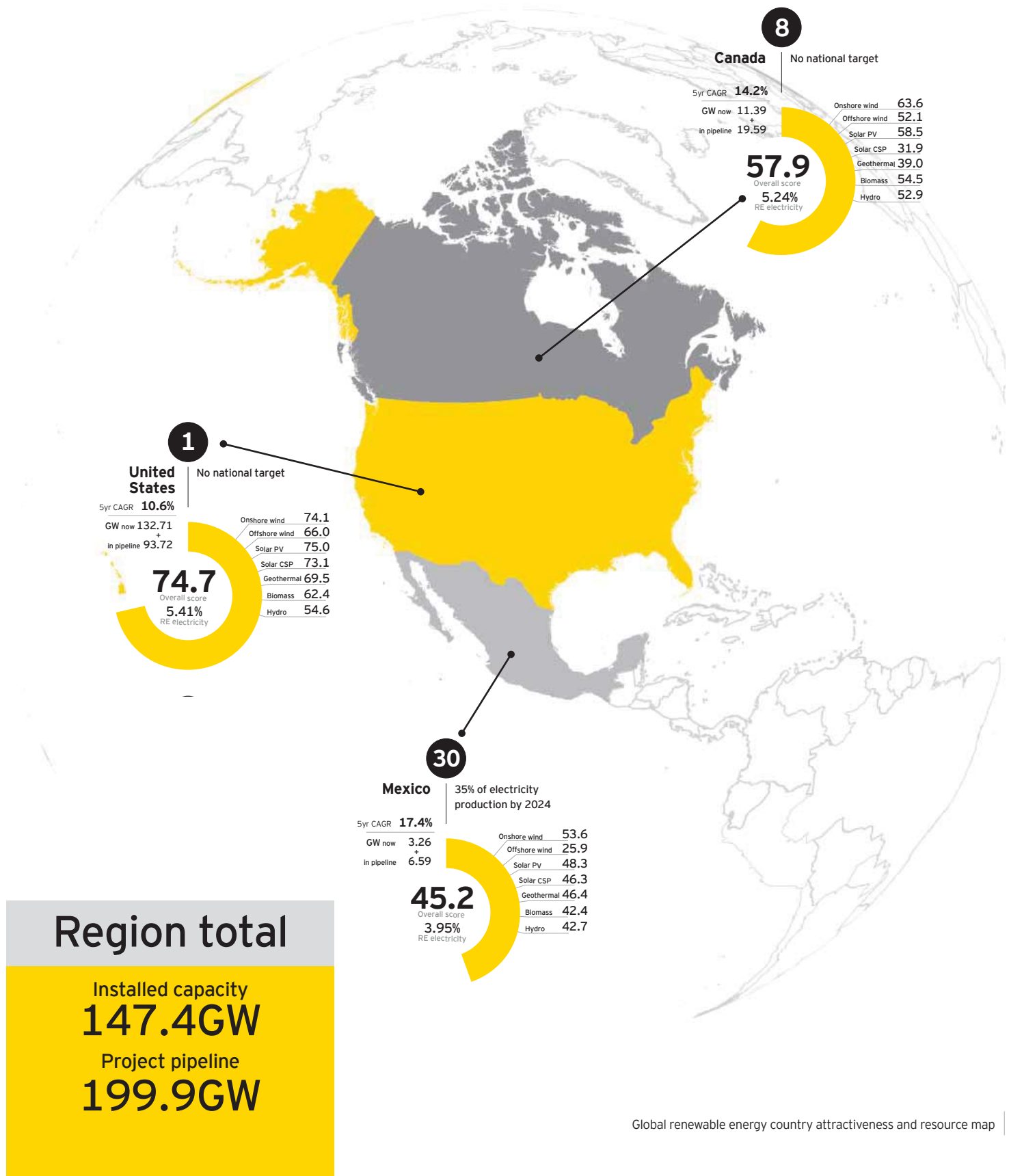
- RECAI scores as of November 2013.
- Renewable capacity and pipeline data are sourced from Bloomberg New Energy Finance as of 6 June 2013.
- Pipeline capacity totals reflect renewable projects at the following stages of development: financing secured; permitted; partially commissioned; and announced/planning begun.
- Renewable energy electricity percentages are 2012 Business Monitor International estimates except for Belgium, Ireland as of 6 June 2013. New Zealand, Norway, Slovenia and South Korea. For these countries, the percentage is based on 2010 US Energy Information Administration (EIA) data for non-hydro renewable capacity and total electricity capacity as of 6 June 2013.

# Asia-Pacific

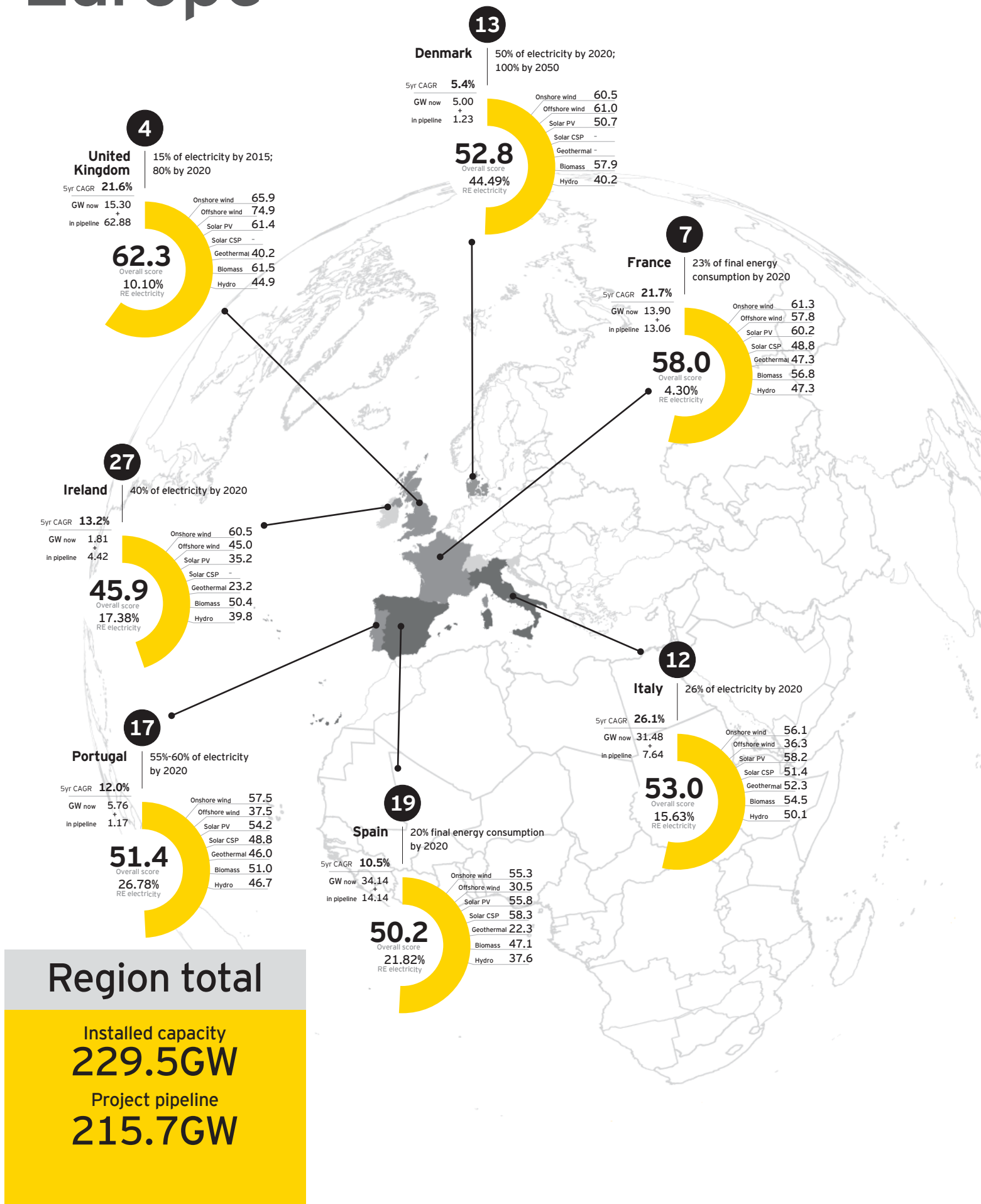


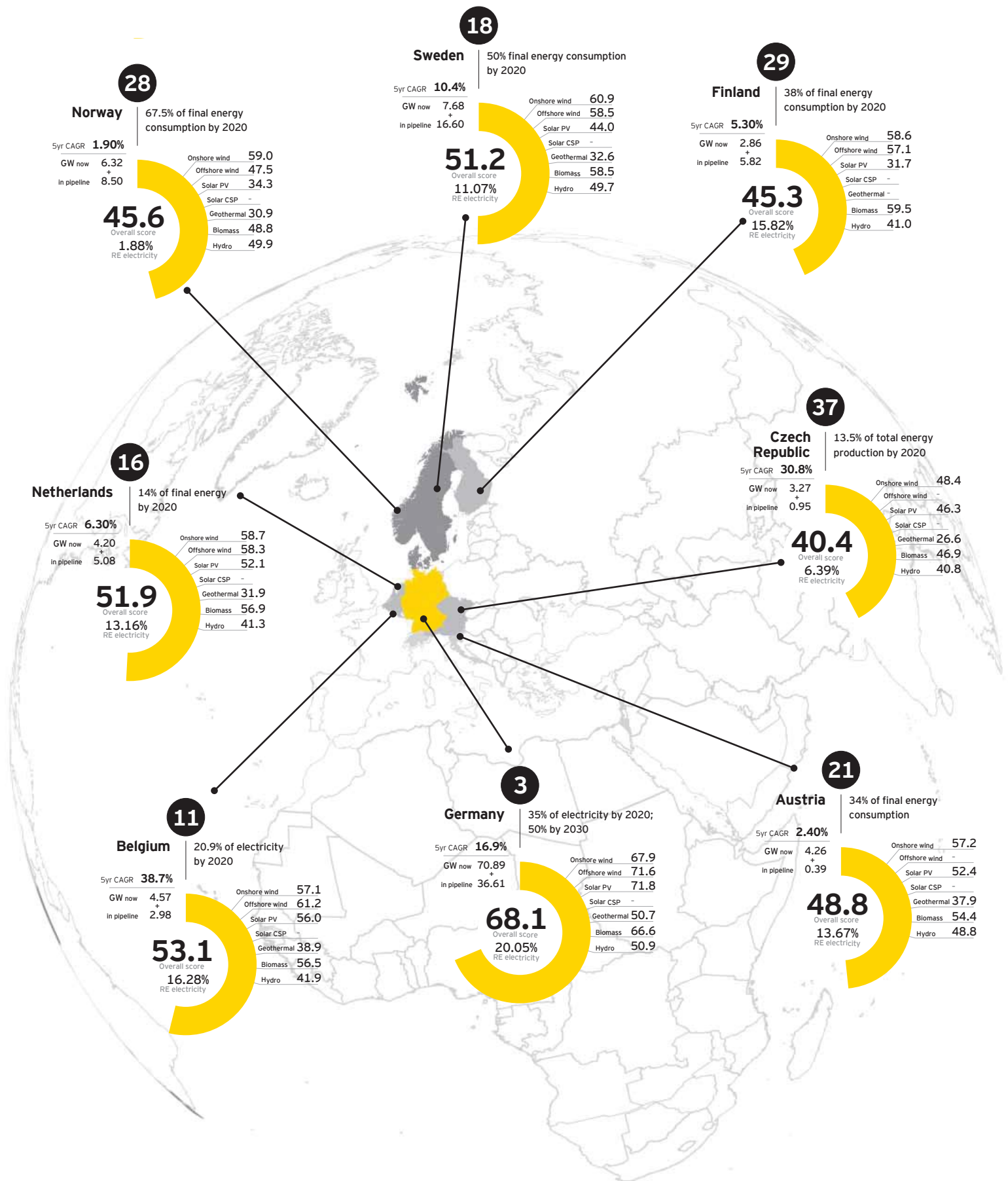


# North America



# Europe

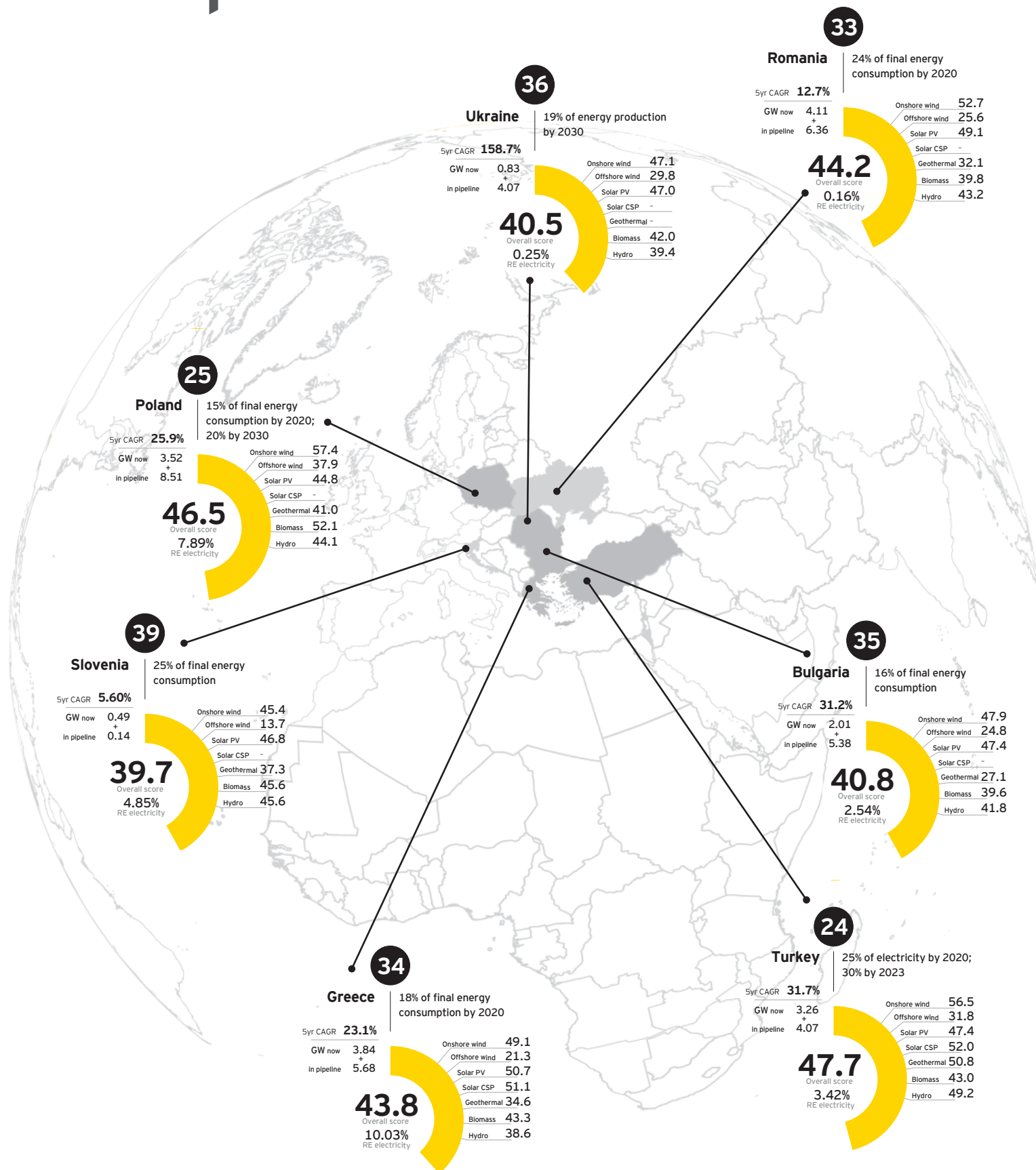




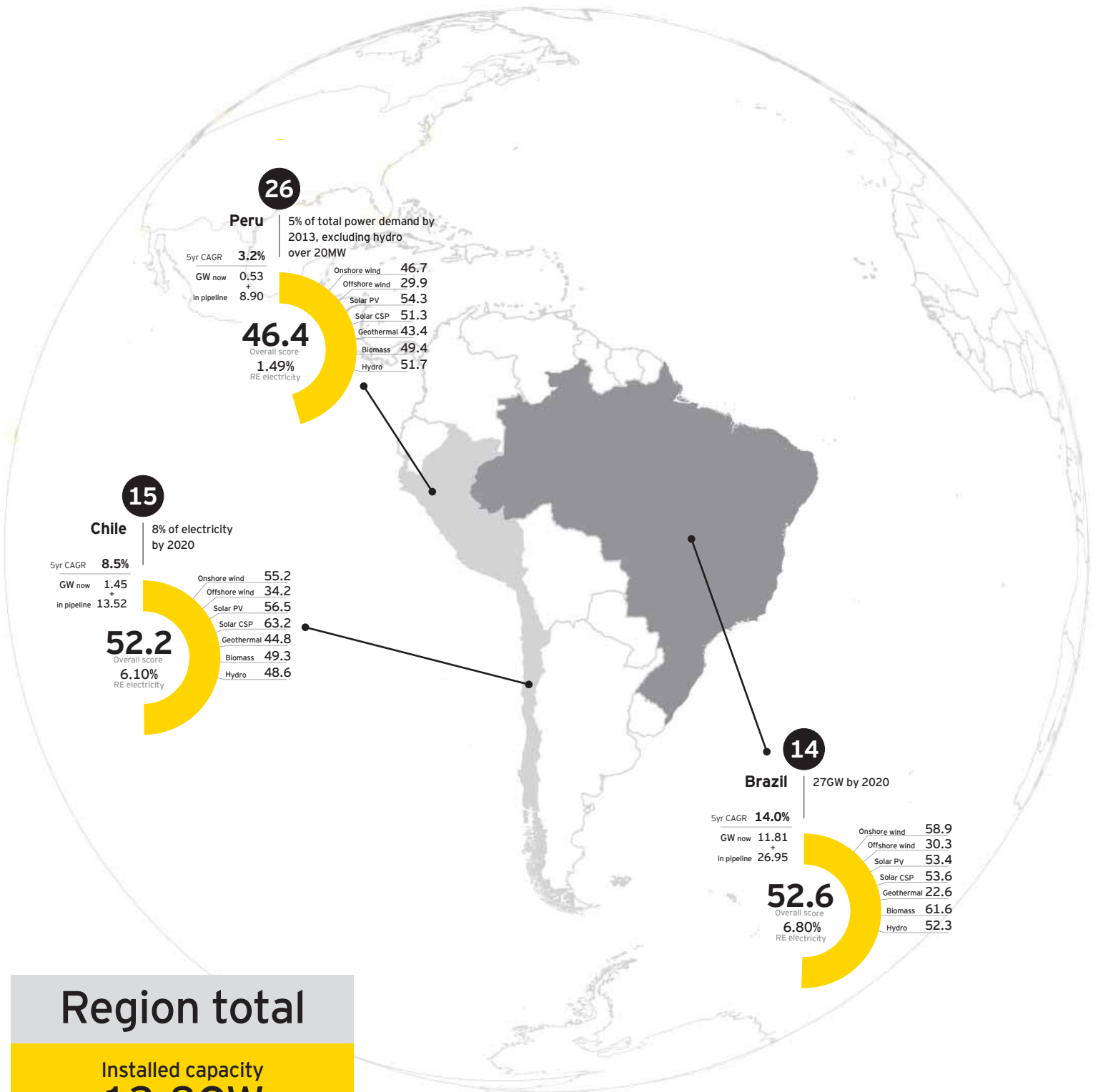
Europe continued, next page



# Europe



# South America



# Middle East and Africa

32

## Morocco

42% of electricity production 2020

Syr CAGR **9.50%**  
GW now 0.52  
+  
In pipeline 2.03

**44.3**  
Overall score  
3.42%  
RE electricity

Onshore wind 51.8  
Offshore wind 21.2  
Solar PV 49.5  
Solar CSP 57.9  
Geothermal -  
Biomass 20.9  
Hydro 37.7

31

## Israel

5% of electricity by 2014;  
10% by 2020

Syr CAGR **50.6%**  
GW now 0.26  
+  
In pipeline 1.56

**45.0**  
Overall score  
0.82%  
RE electricity

Onshore wind 45.5  
Offshore wind 16.9  
Solar PV 56.2  
Solar CSP 59.1  
Geothermal -  
Biomass 36.1  
Hydro 40.1

38

## Saudi Arabia

10% of electricity by 2020;  
50% by 2030

Syr CAGR **N/A**  
GW now 0.03  
+  
In pipeline 0.10

**39.8**  
Overall score  
0.00%  
RE electricity

Onshore wind 40.8  
Offshore wind 13.1  
Solar PV 53.0  
Solar CSP 50.2  
Geothermal 26.8  
Biomass 17.9  
Hydro -

40

## Kenya

60% of energy from renewable sources by 2030

Syr CAGR **6.71%**  
GW now 0.3  
+  
In pipeline 2.10

**39.6**  
Overall score  
32.39%  
RE electricity

Onshore wind 46.4  
Offshore wind 21.7  
Solar PV 44.0  
Solar CSP 47.8  
Geothermal 48.8  
Biomass 40.3  
Hydro 42.4

20

## South Africa

4% of electricity by 2013;  
13% by 2020

Syr CAGR **4.10%**  
GW now 0.12  
+  
In pipeline 11.50

**49.7**  
Overall score  
0.13%  
RE electricity

Onshore wind 53.8  
Offshore wind 28.1  
Solar PV 56.3  
Solar CSP 58.9  
Geothermal -  
Biomass 38.2  
Hydro 44.1

## Region total

Installed capacity

**1.2GW**

Project pipeline

**17.3GW**





## Contacts

**Gil Forer**  
Global Cleantech Leader  
+1 212 773 0335  
gil.forer@ey.com

**Scott Sarazen**  
Global Markets Leader  
+1 617 585 3524  
scott.sarazen@ey.com

**Ben Warren**  
Global Cleantech  
Transactions Leader  
+44 20 7951 6024  
bwarren@uk.ey.com

**Paul Naumoff**  
Global Cleantech and CCaSS  
Tax Leader  
+1 614 232 7142  
paul.naumoff@ey.com

**Heather Sibley**  
Global Cleantech Assurance  
Leader  
+1 415 894 8032  
heather.sibley@ey.com

**Nicola Marshall**  
Global Cleantech Transaction  
Advisory Services Resident  
Manager  
+1 212 773 5156  
nicola.marshall@ey.com

**John de Yonge**  
Director, Account  
Enablement  
+1 201 872 1632  
john.de\_yonge@ey.com

**Scott E. Anderson**  
Global Marketing Director,  
Cleantech  
+1 201 872 1292  
scott.anderson@ey.com

**Lily Donge**  
Global Knowledge Leader  
+1 202 327 6796  
lily.donge@ey.com

**Alex Desbarres**  
Global Strategic Analyst  
+44 20 7951 7078  
adesbarres@uk.ey.com

EY | Assurance | Tax | Transactions | Advisory

### About EY

EY is a global leader in assurance, tax, transaction and advisory services. The insights and quality services we deliver help build trust and confidence in the capital markets and in economies the world over. We develop outstanding leaders who team to deliver on our promises to all of our stakeholders. In so doing, we play a critical role in building a better working world for our people, for our clients and for our communities.

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst & Young Global Limited, each of which is a separate legal entity. Ernst & Young Global Limited, a UK company limited by guarantee, does not provide services to clients. For more information about our organization, please visit ey.com.

### How EY's Global Cleantech Center can help your business

From start-ups to large corporations and national governments, organizations worldwide are embracing cleantech as a means of growth, efficiency, sustainability and competitive advantage. As cleantech enables a variety of sectors, old and new, to transform and participate in a more resource-efficient and low-carbon economy, we see innovation in technology, business models, financing mechanisms, cross-sector partnerships and corporate adoption. EY's Global Cleantech Center offers you a worldwide team of professionals in assurance, tax, transaction and advisory services who understand the business dynamics of cleantech. We have the experience to help you make the most of opportunities in this marketplace, and address any challenges. Whichever sector or market you're in, we can provide the insights you need to realize the benefits of cleantech.

© 2013 EYGM Limited.  
All Rights Reserved.

EYG no. LI015778  
CSG/GSC 2013/1129408  
ED None

This material has been prepared for general informational purposes only and is not intended to be relied upon as accounting, tax, or other professional advice. Please refer to your advisors for specific advice.

[ey.com/cleantech](http://ey.com/cleantech)