

AFRICA RENEWABLE  
ENERGY INITIATIVE

**AREI**

PROJECTS  
&  
PROGRAMS  
LANDSCAPE



**AREI**

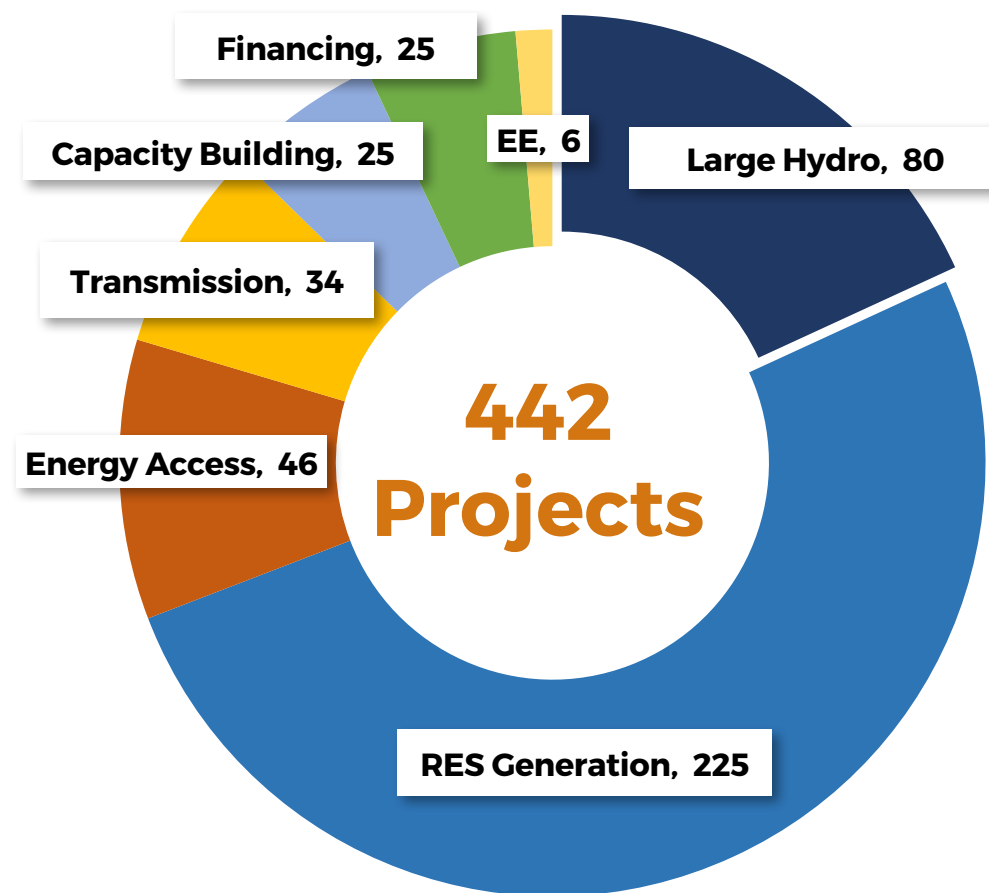
# CURRENT PROJECTS LANDSCAPE

- ***Countries and partners are providing projects & programs***
- ***Preliminary information gathered from multiple sources, This is not deemed comprehensive, and remains work-in-progress***
- ***Projects & Programs will be subject to feasibility assessment and screening against AREI criteria***
- ***We plan for a dynamic AREI Database - with continuous tracking and analysis***
- ***This will be used to mobilize financial, project preparation and other necessary support through the AREI trust fund and from Partners.***

# CURRENT PROJECTS LANDSCAPE

*Preliminary information received;*

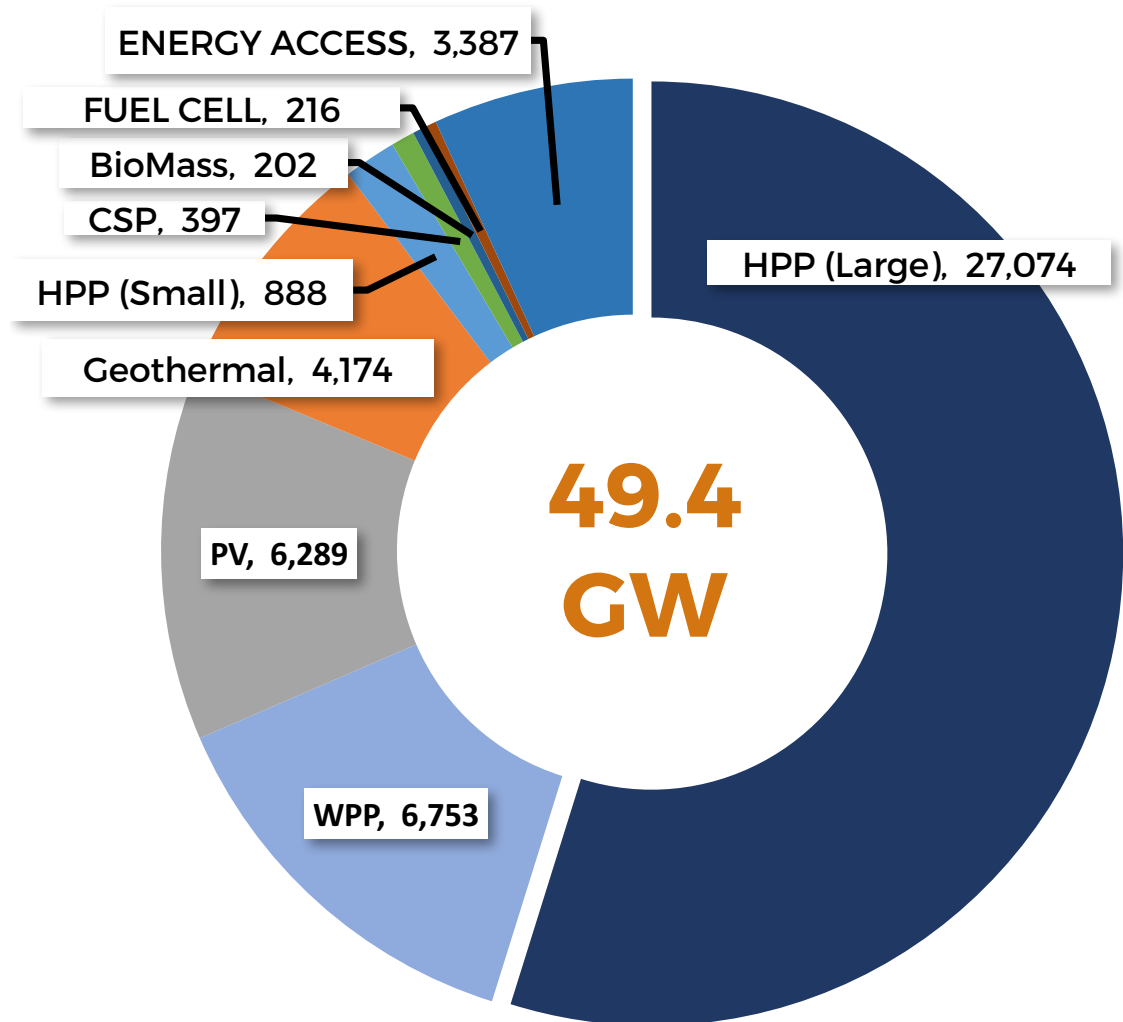
- **442** projects under-review are dominated by generation projects;
- **18%** of these are large hydro (>50 MW), and the majority of these are regional projects > 100 MW each.
- **50%** of the projects are RES generation across different technologies (AREI Category B)
- **30%** of the programs are focused on energy access, financing, capacity building and transmission (AREI Category A)
- Only **6** projects have been reported for energy efficiency.



# CURRENT TECHNOLOGY LANDSCAPE

**49.4 GW** of capacity includes;

- **25.0 GW** (50% capacity is in large regional projects (> 100MW) – very little of this capacity is expected to start construction by 2020.
- **2.0 GW** of large HPP projects in country (50-100 MW)
- Energy Access projects only represent **3.4 GW (7.0%)**, where as today's energy access gap is **35-40 GW**.
- Bio-mass and small HPP projects together add-up to only **1.09 GW (5% of all capacity)**

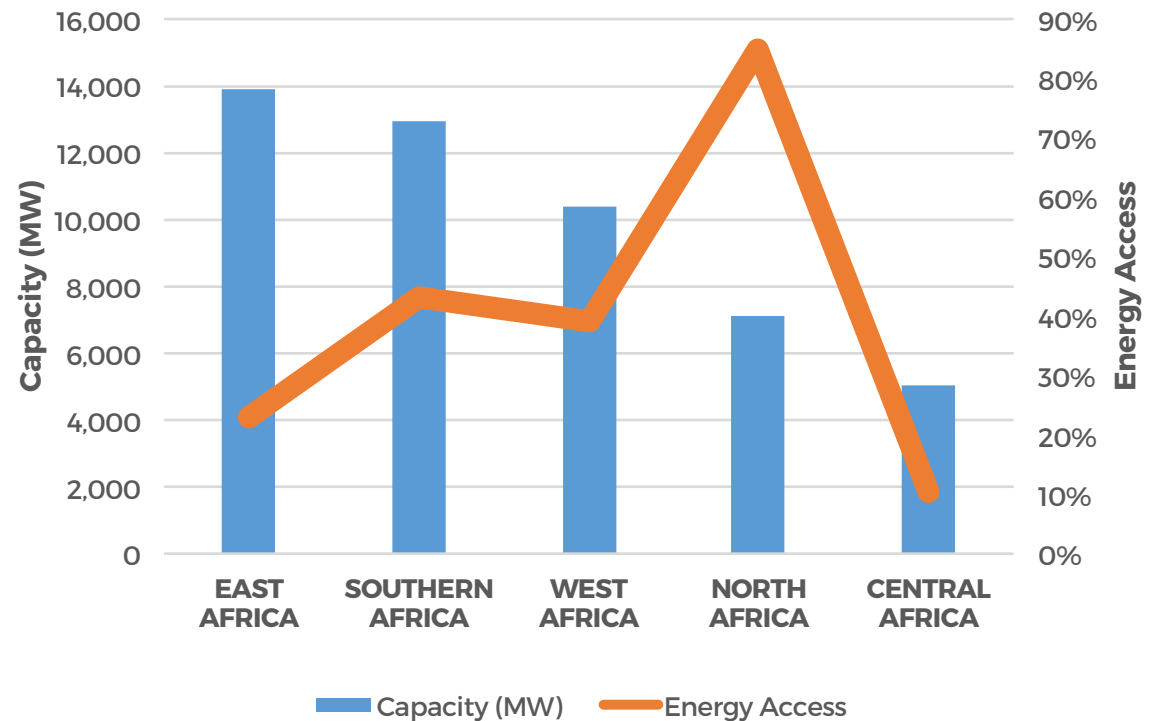


# CURRENT REGIONAL LANDSCAPE

**49.4 GW** of capacity includes;

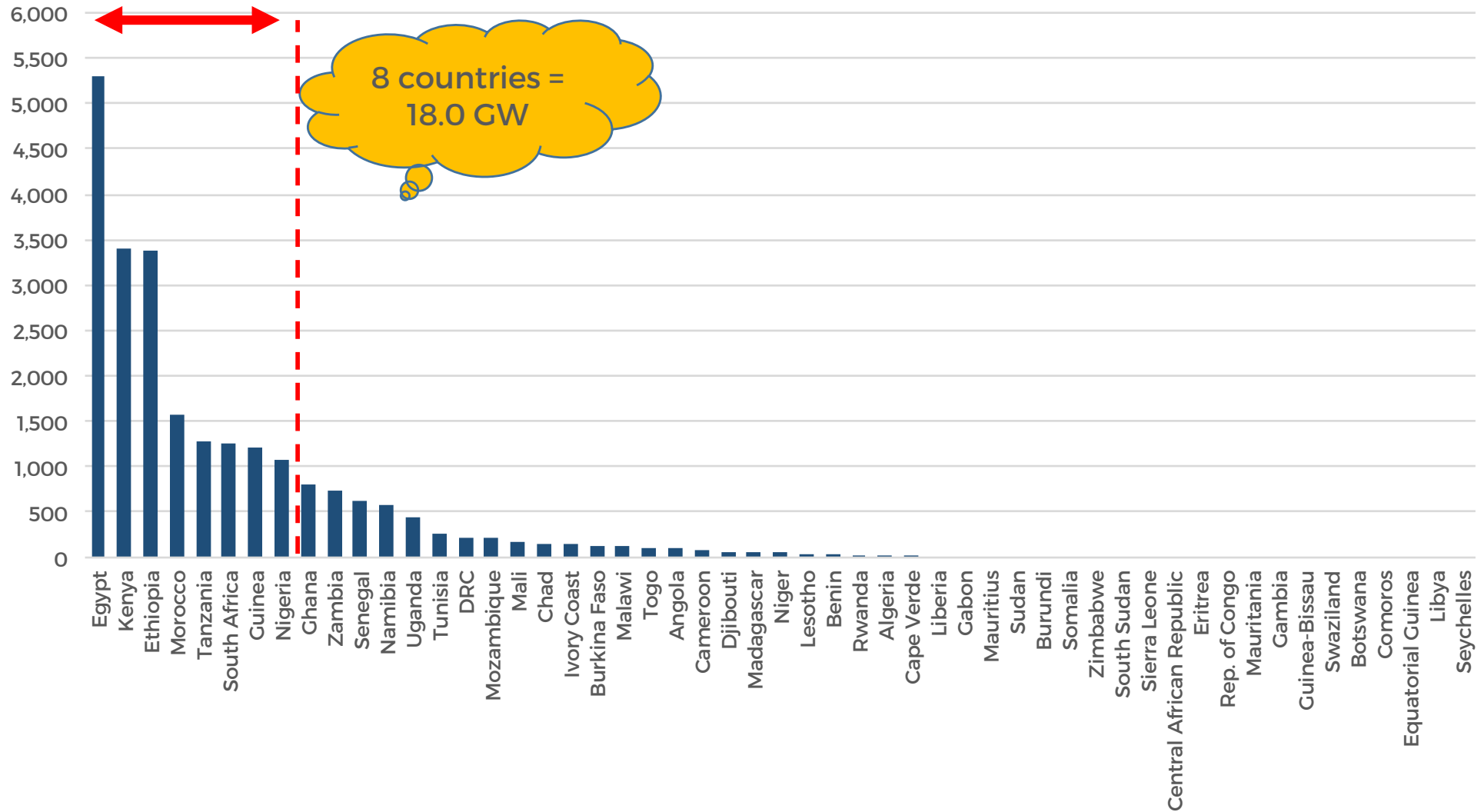
- **50%** capacity in large regional projects (> 100MW)
- East Africa has a pipeline of **14GW** vs. Central Africa with only **5 GW** of projects
- Central Africa accounts for only **370 MW** of projects if we exclude INGA and Ruizizi III.
- However, Central Africa has **half the Energy Access** to East Africa

**Regional Capacity (MW) vs. Energy Access**



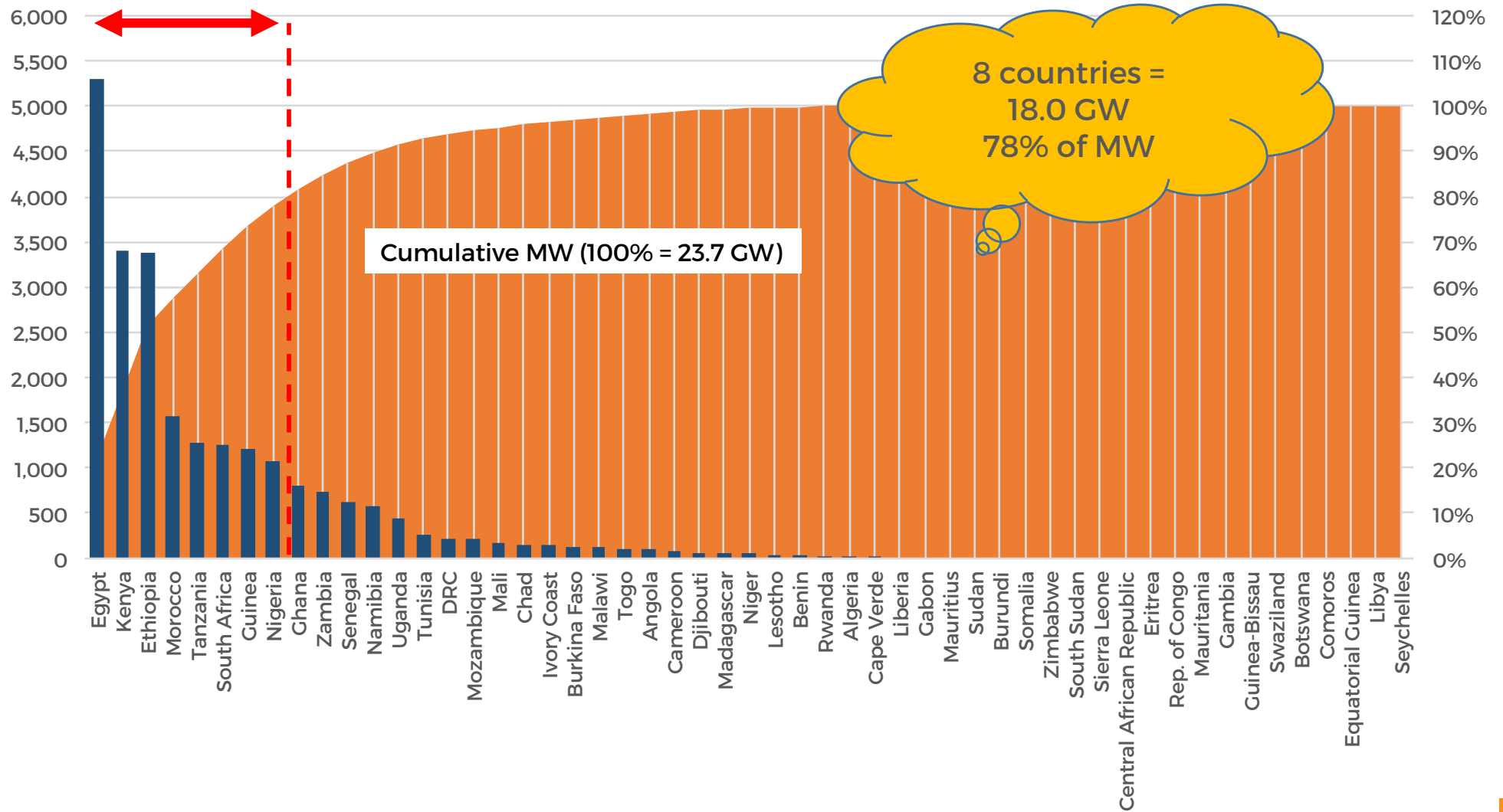
# CURRENT PROJECTS LANDSCAPE

Investment (MW) (lhs) vs. Cumulative Energy Access (rsh)



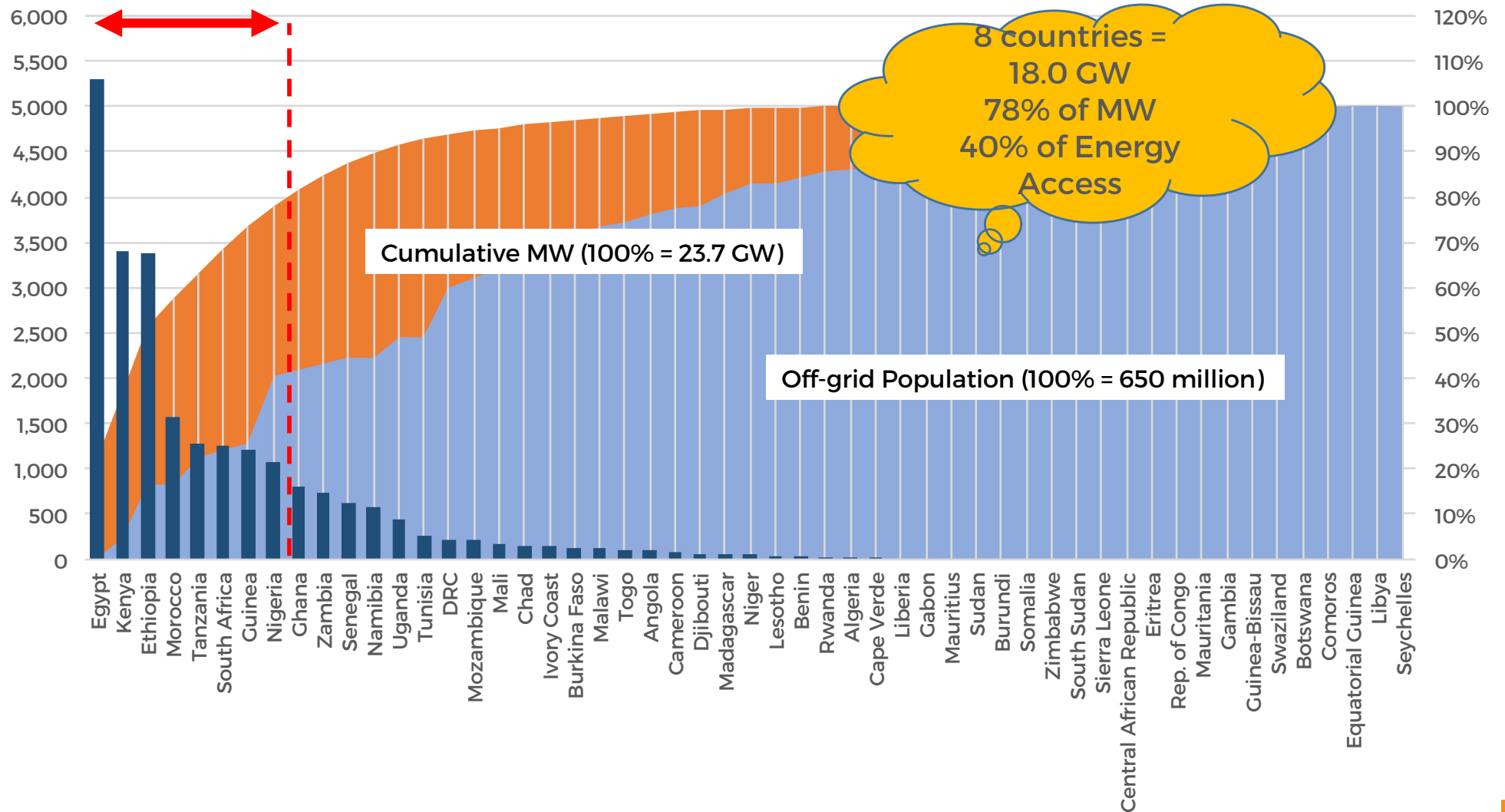
# CURRENT PROJECTS LANDSCAPE

Investment (MW) (lhs) vs. Cumulative Energy Access (rsh)



# CURRENT PROJECTS LANDSCAPE

Investment (MW) (lhs) vs. Cumulative Energy Access (rsh)





# Current Landscape

## *A Lot of Power for some countries*

*Based on an initial assessment of renewable energy activity in Africa;*

- *Heavy skewing activity towards a few countries*
- *There is a preference towards projects rather than enabling programs (energy access, capacity building, financial strength)*
- *There is an over-whelming preference for large regional projects*
- *The AREI target of 10 GW by 2020 looks likely to be achieved, but the transformational change in approach to energy – which is core to AREI – needs a strong focus*