

RES4MED ANNUAL CONFERENCE

**Innovation as the key
enabler to power Africa**

RES4MED – Looking Foreword

Rome May 22nd

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RENEWABLE ENERGY SOLUTIONS
FOR THE MEDITERRANEAN

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Green Power

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World population growth
(from 7 to 8 billion people in the next 10 years)
and life expectancy increase



Urbanization & Megacities:
two-thirds of the world's population will live
in cities by 2050
now it's 50%



Technological breakthroughs:
and deeper penetration of new technologies
with significant cost reduction



Growth of emerging economies:
by 2030 the E7 will overtake the G7



Global demand growth:
though limited
natural resources; fight against climate
change

Megatrends impacting and driving the energy sector, especially in Africa

The African Context

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Young and growing population

2010/2015
+14,56%



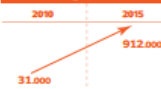
2034 **1,1 BILLION**
working age population

Oil exports



Since 2010,
decelerating growth
in oil exports

Sharp increase of emigration flows



Improvement of life expectancy

2000
50,30 YEARS
2014
58,60 YEARS
+8 YEARS

Education

80%
Universal **primary** education
almost achieved



Resources

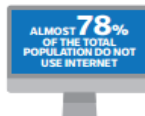
Africa is home
to the majority of the world's
unutilized agricultural land



Sub-Saharan Africa
hosts the largest reserves of the world
of many natural resources

International Aids

A vast amount of international aids and development
fundings have grown dramatically over the years
13,01 billion USD in 2000
46,55 billion USD in 2014



Communication Gap

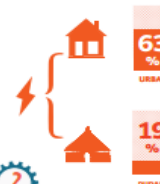
Almost **78%** of the total population
do not use internet yet, even if the rate has grown
from **9,8** to **22,4 %** between 2010 and 2015



Power shortage

**2-4% negative
impact on GDP**
More than **632 million** people
without access to electricity

Access to electricity rates: urban vs rural population



Lack of skilled labor force

Gross enrollment ratio
for tertiary education
is still growing too slowly



7,9 % in 2010
8,6 % in 2015

Procedures

27,3 days
is the average time
to complete
the registration

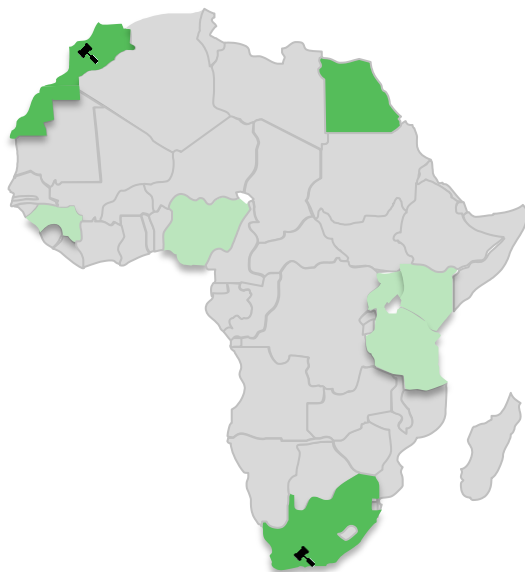


Local entrepreneurship is held back by lengthy and costly procedures

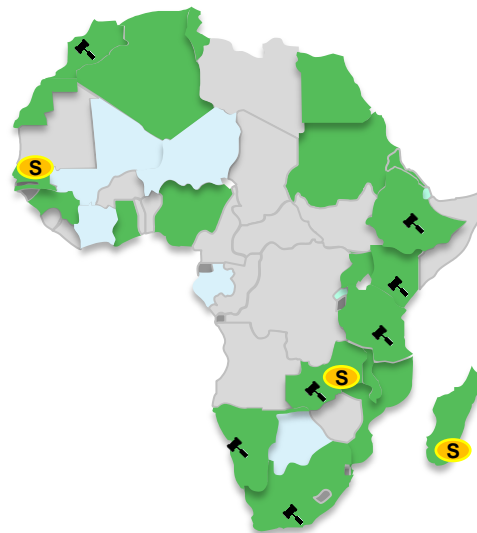
54%
of the average annual
income per capita
is the cost of registration

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Yesterday



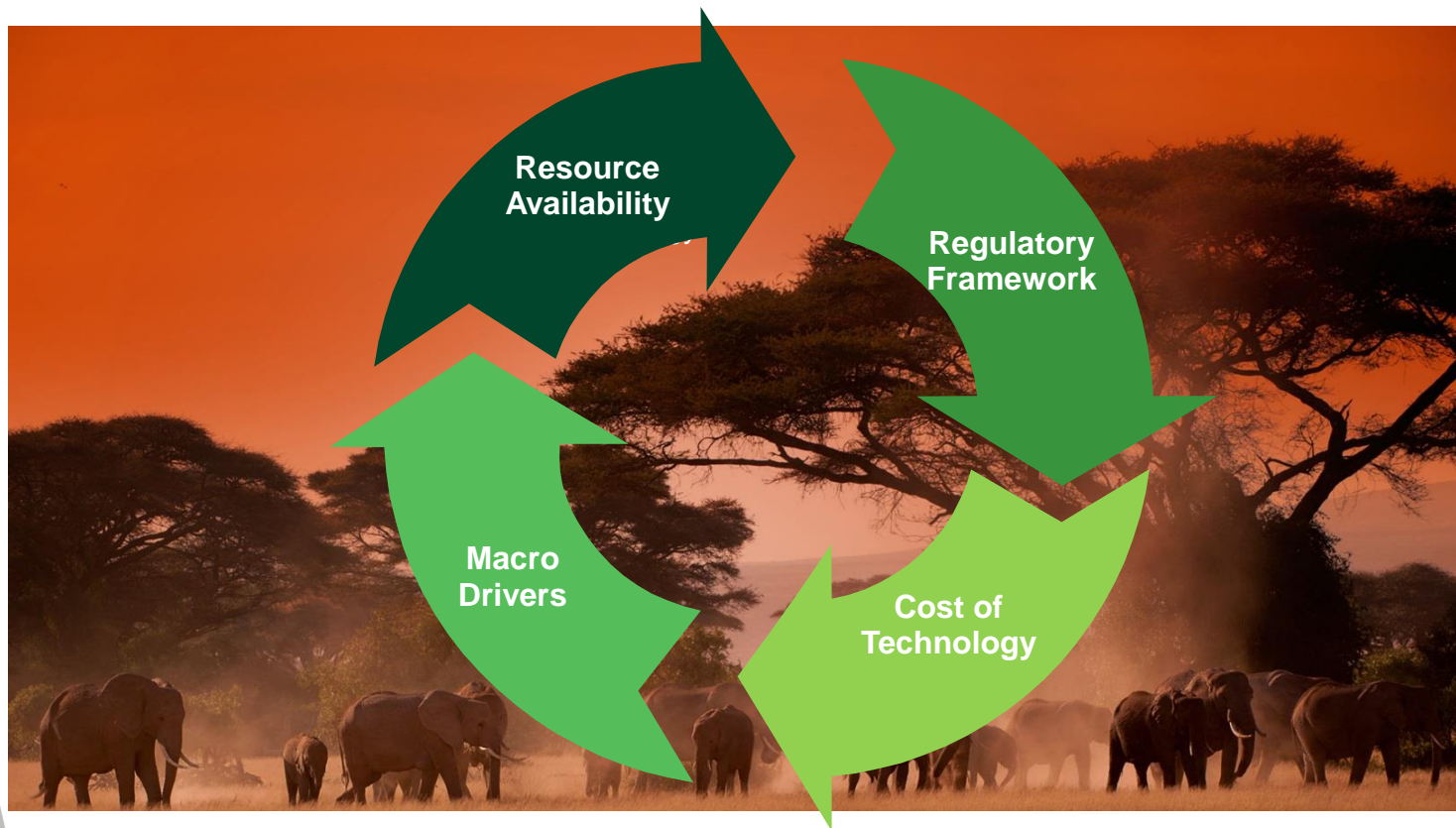
Today



- RES Target and support mechanisms
- RES development thanks to support mechanisms
- RES Target but NO support mechanisms
- S Scaling Solar
- Auctions

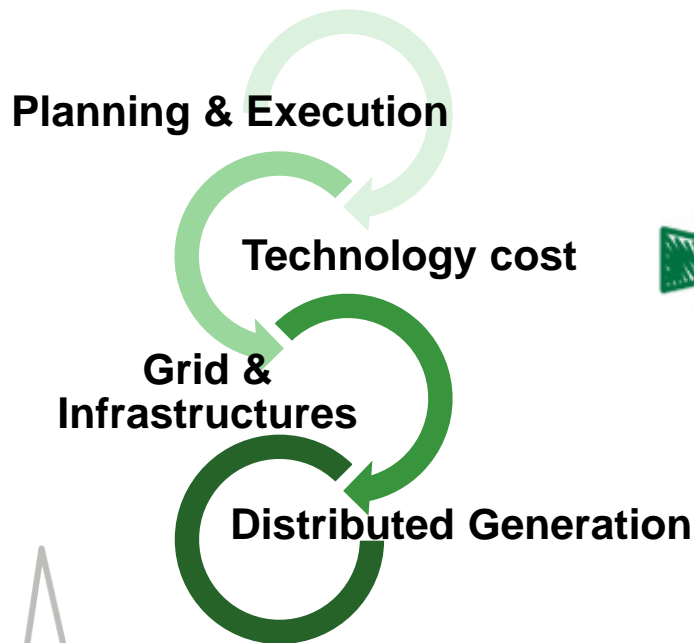
Over 20 countries adopted dedicated regulation for RES Development
mainly through tenders and the recent IFC's Scaling Solar program

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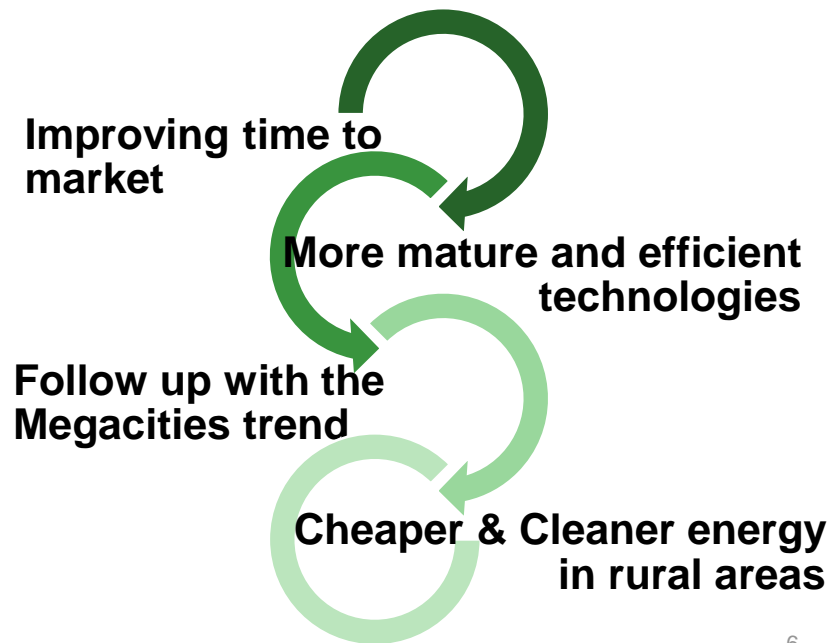


... Key enablers for further growth in Africa

Enabler



Expected Impact

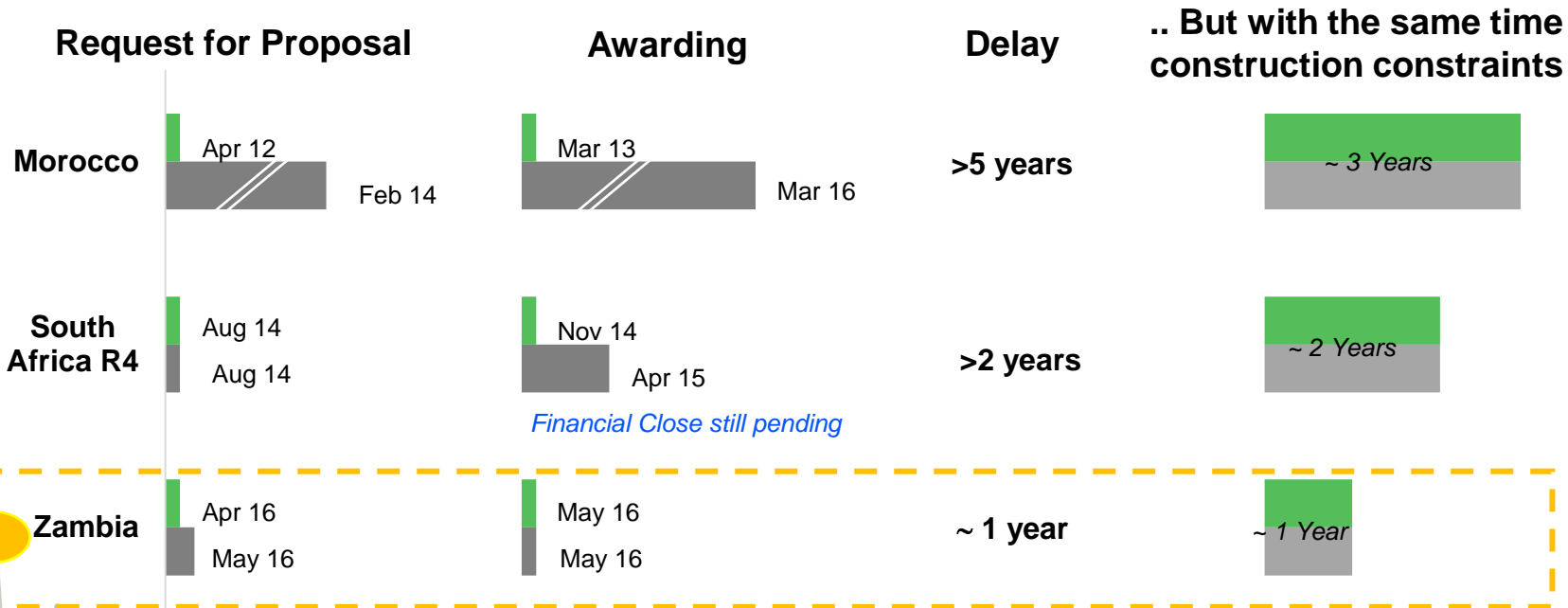


What can be improved – Case Studies

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■ Scheduled Date

■ Actual Date



Time to market is the critical issue
to be addressed to boost RES development in Africa

What's Next – our vision

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Innovation



Sustainability



Strategy pillars for shared value creation
within company, environment & communities

What's Next – RES4MED Members

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— Already present in the Association — — Objectives for next 5 years

Equipment manufacturers



Project developers



Financing

EPC Contractors



IPP/ Investors



O&M Asset management



Regulatory, TSO, Industry association



Advisory, Consulting, Engineering services



Academia, R&D



POLITECNICO DI MILANO



POLITECNICO DI TORINO

WIND & PV
MANUFACT.



「WATCH THIS SPACE」

Africa's clean energy future has arrived