

CLEAN ENERGY FINANCING OVERVIEW

NATIONAL ACADEMY OF SCIENCES WORKSHOP

ETHAN ZINDLER

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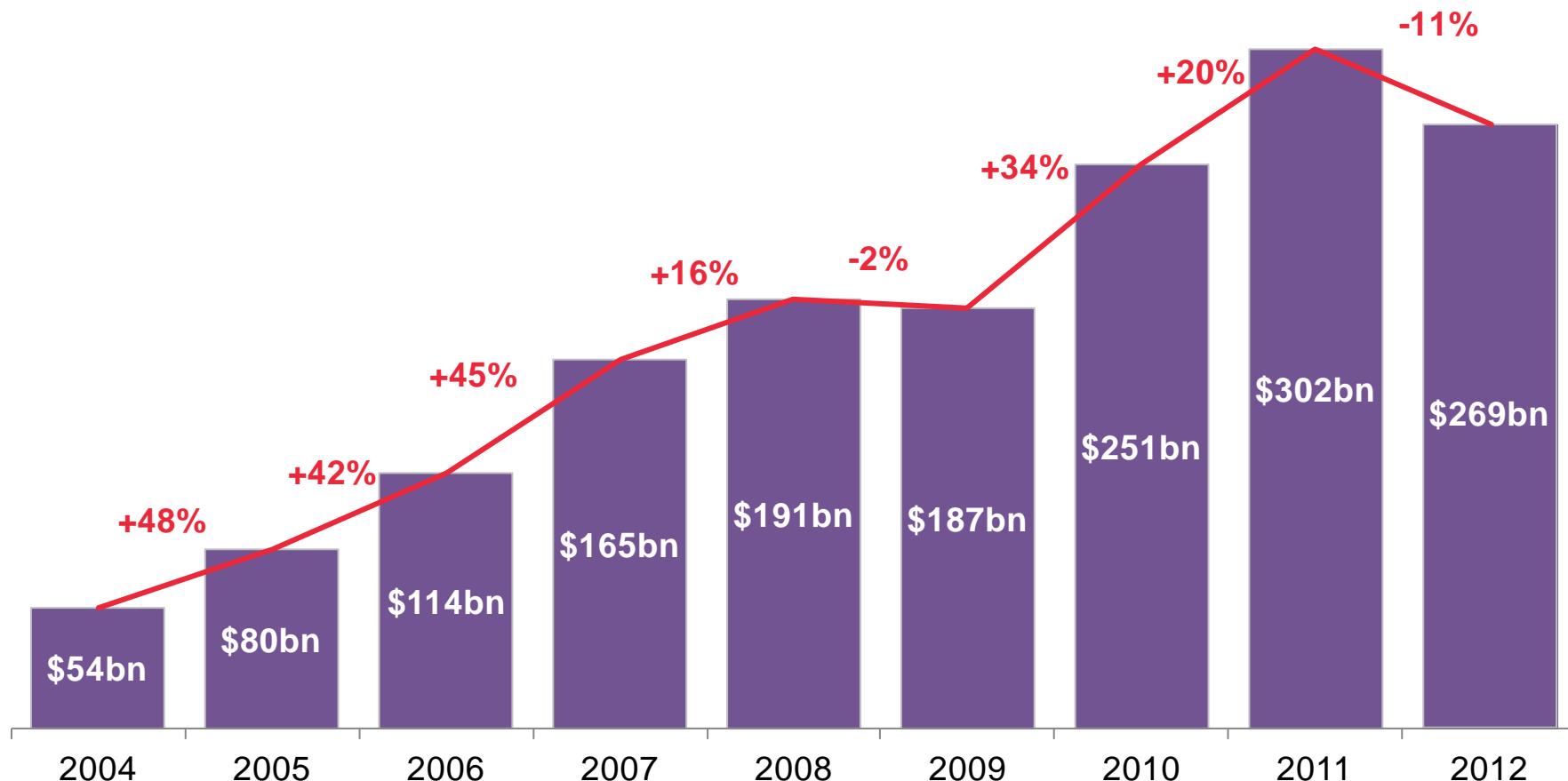
SUPPLY CHAIN & TECHNOLOGY



UTILITIES & ENERGY



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

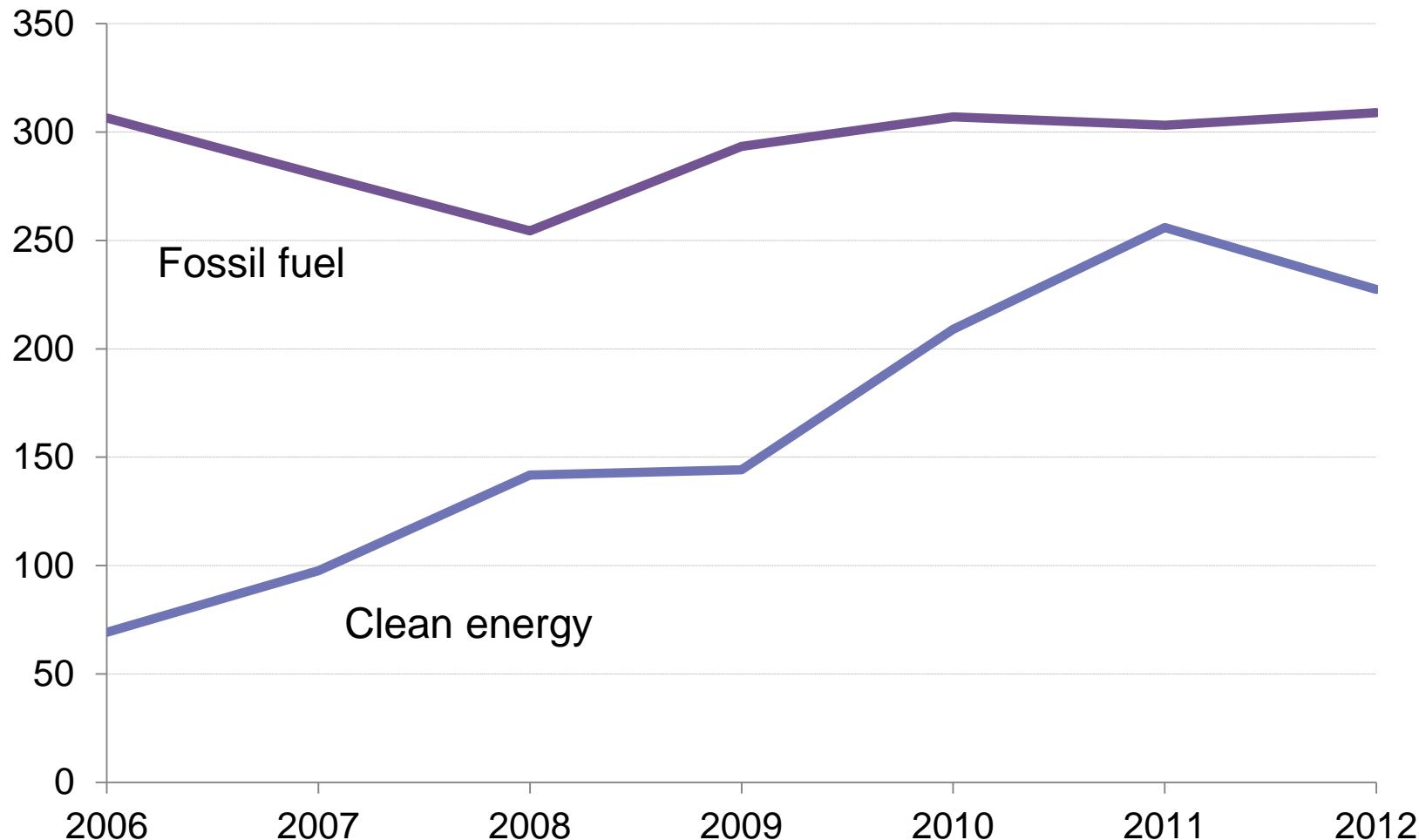


Note: Includes corporate and government R&D, and small distributed capacity.

Adjusted for re-invested equity. Does not include proceeds from acquisition transactions

Source: Bloomberg New Energy Finance

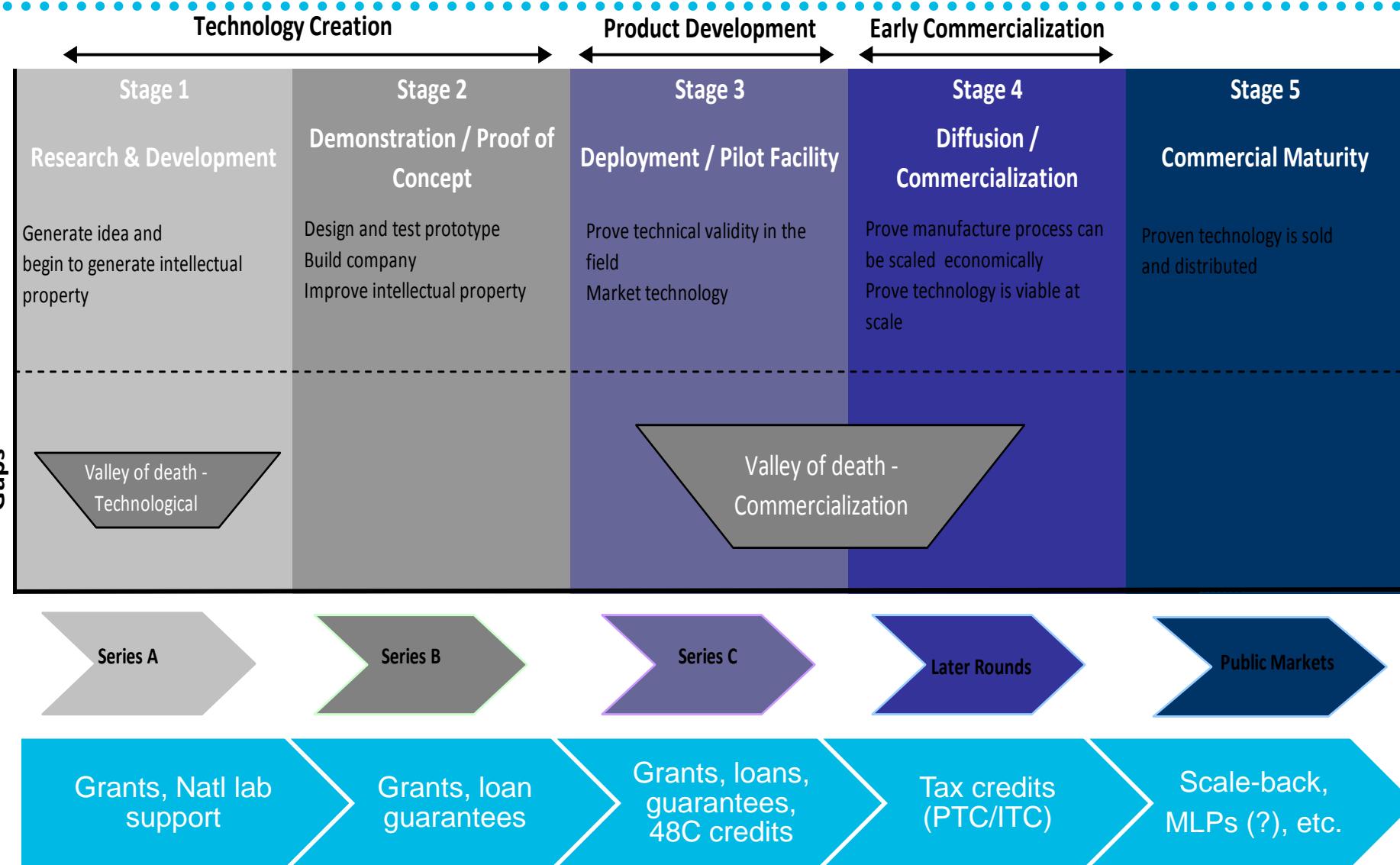
CLEAN VS FOSSIL-BASED GENERATING CAPACITY INVESTMENT, 2006–12 (\$BN)



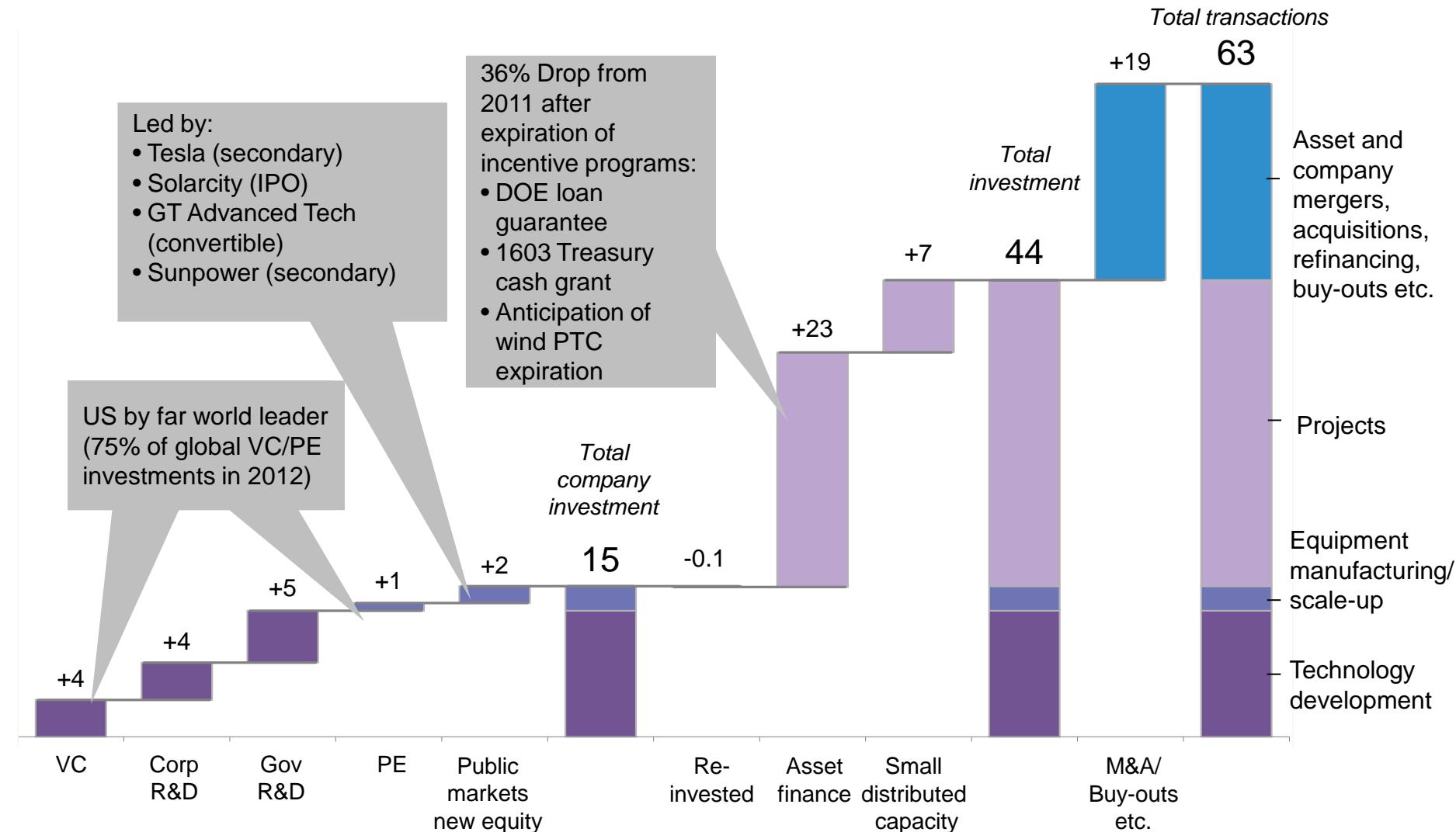
Note: Clean energy total excludes large hydro. Fossil fuel is investment on coal and gas capacity. We assume capacity retirement of 3.3%/yr for coal and 4%/yr for gas.

Source: Bloomberg New Energy Finance

TECH DEVELOPMENT AND WHERE FINANCING / GOVERNMENT SUPPORT FITS IN



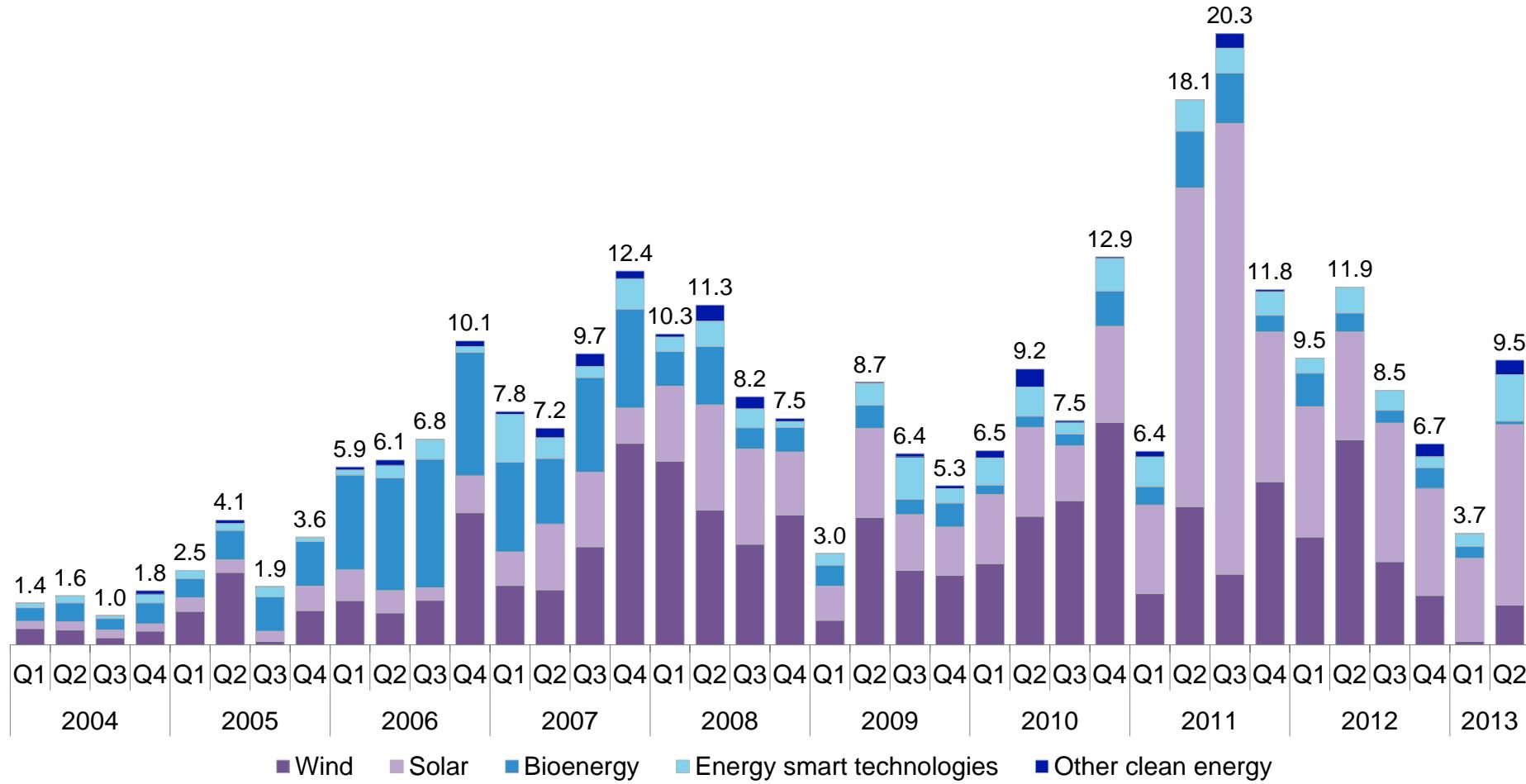
CLEAN ENERGY INVESTMENT TYPES & FLOWS IN THE UNITED STATES, 2012 (\$BN)



Note: Includes corporate and government R&D, Adjusted for re-invested equity.

Source: Bloomberg New Energy Finance

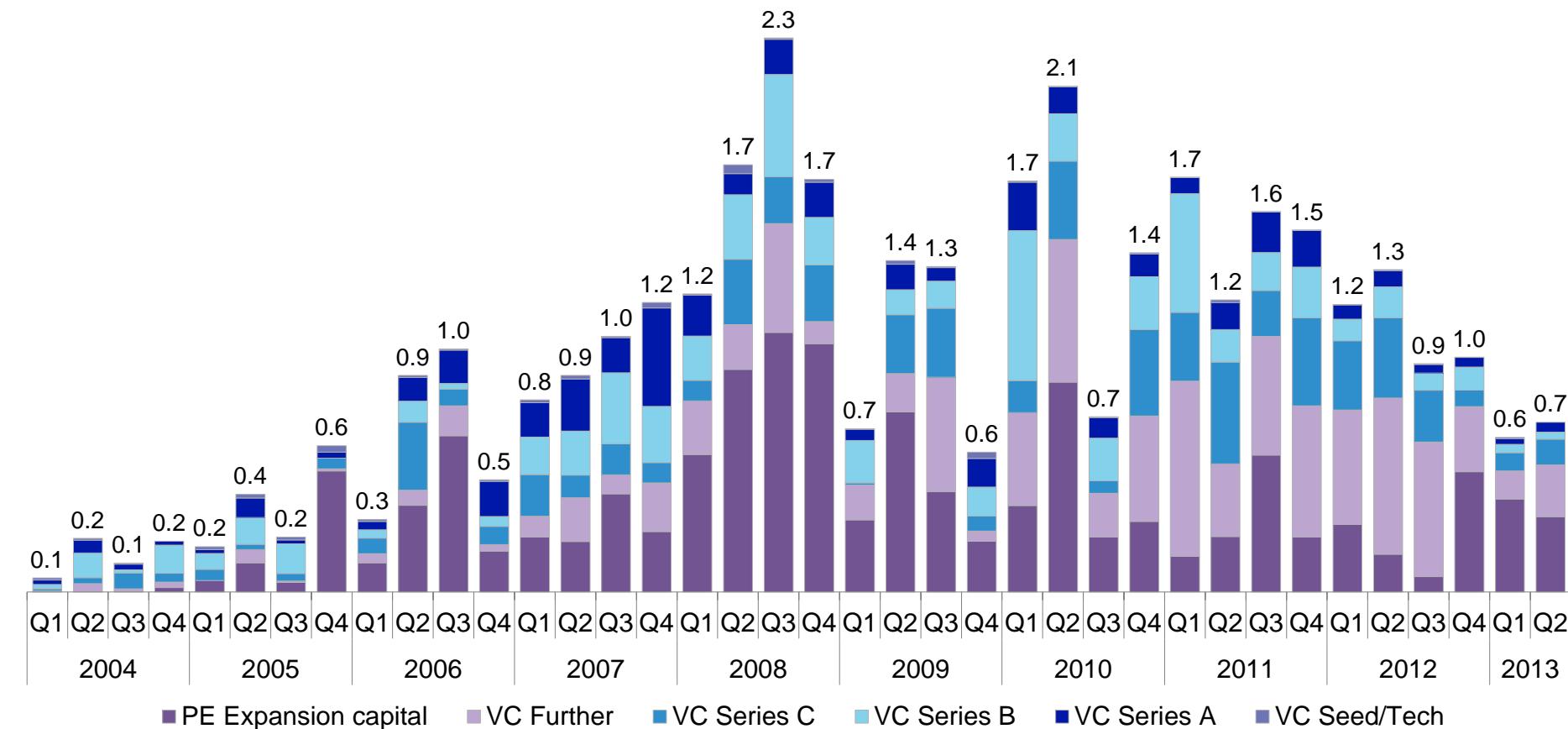
NEW INVESTMENT IN CLEAN ENERGY IN THE US BY SECTOR, Q1 2004–Q2 2013 (\$BN)



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

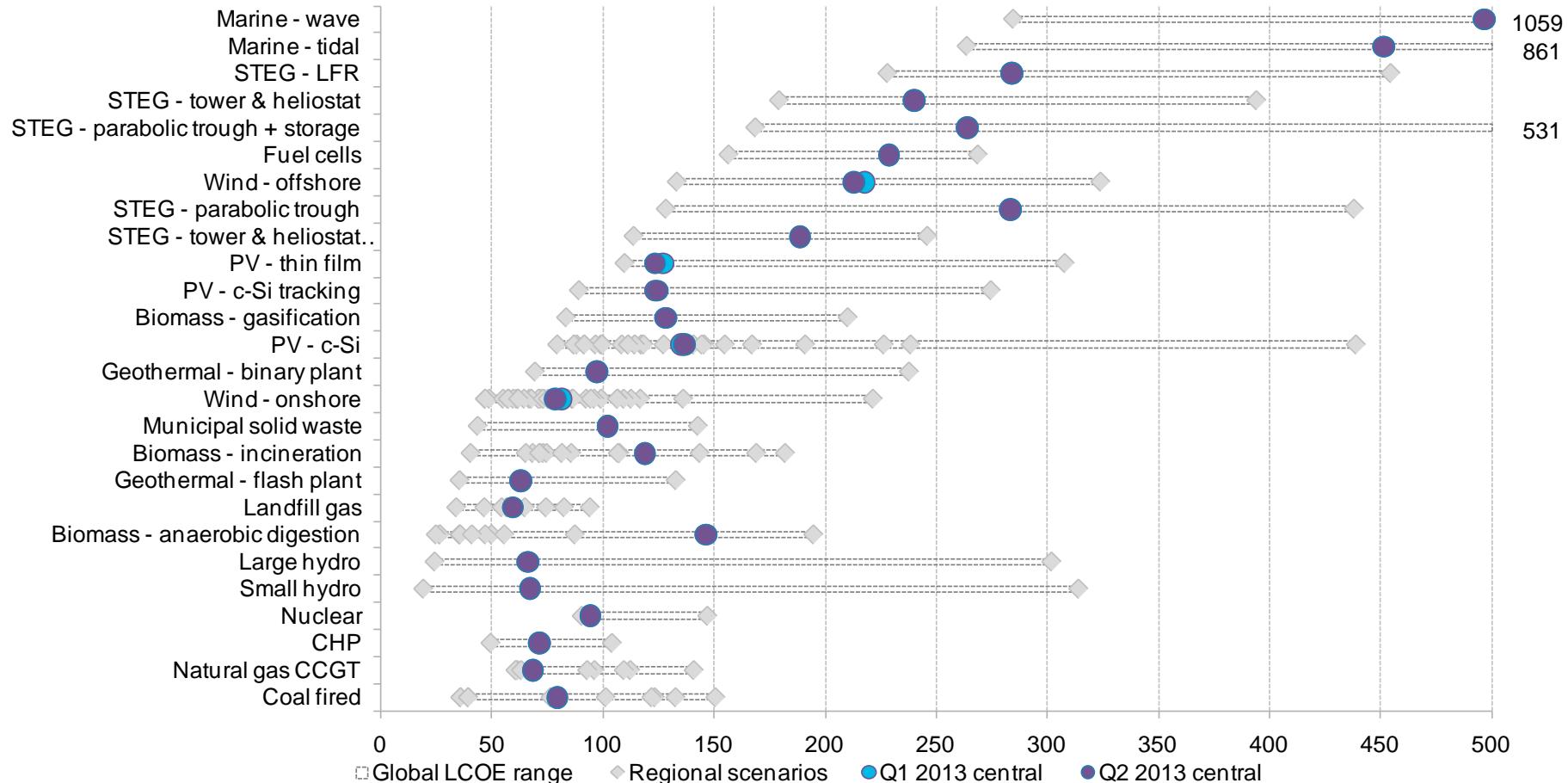
VC/PE NEW INVESTMENT IN CLEAN ENERGY IN THE US BY ROUND TYPE, Q1 2004–Q2 2013 (\$BN)



Note: Total values include estimates for undisclosed deals. Excludes PE buy-outs which do not constitute new money flows, but rather money changing hands.

Source: Bloomberg New Energy Finance

LEVELISED COST OF ELECTRICITY Q2 2013 (\$/MWH)



Note: regional scenarios are shown to demonstrate the richness of the dataset and are discussed further in the sector-specific sections of the Note.

Source: Bloomberg New Energy Finance

THANKS!

ETHAN ZINDLER, EZINDLER@BLOOMBERG.NET
TWITTER: [@ETHANALL](https://twitter.com/ETHANALL)

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