ENABLING POLICIES

HIGH-IMPACT COUNTRIES

Countries whose efforts are critical to the achievement of SEforALL objectives globally

Which African and Asian countries have an enabling environment for investment in renewable energy?

QUICK FACTS

- Globally, three quarters of countries covered by Regulatory Indicators for Sustainable Energy (RISE) have adopted legislation and strategic plans and assigned responsible institutions to achieve those targets. Almost all countries have a renewable energy target.
- Where wind and solar power account for at least 5 percent of total electricity generated in 2014, more than 80 percent of countries globally have completed a grid integration study to understand how to bring variable renewable energy into the grid.
- The average permitting time for a renewable energy project for the 111 countries covered by RISE is about 500 days. Small-scale, grid-connected, solar and wind projects usually benefit from quicker procedures.
- In 2015, India announced an ambitious goal to increase its renewable power capacity fivefold in seven years. Of this increase, 57 percent would be solar power and 34 percent wind power.
- China's Renewable Energy Law (2005) set ambitious renewable energy targets underpinned with clear strategies and investment plans. The target for non-fossil fuel energy is 15 percent of national total energy consumption by 2020. There are technology-specific targets for solar power, wind power, hydropower and geothermal energy. Investment incentives and feed-in tariffs are in place for wind and solar power.
- Twenty-three countries have a carbon pricing mechanism in place to accompany the deployment of renewable energy. This includes 15 countries that subscribe to the European Union's Emission Trading Scheme (EU-ETS), a key tool to meet EU climate and energy targets. Australia and Turkey are the only countries that have introduced mandatory reporting of greenhouse gas emissions by emitters while still considering the implementation of a carbon pricing mechanism.

CONTEXT

- RISE offers policy makers and investors detailed country-level insights on the policy and regulatory environment for sustainable energy across 111 countries globally.
- 77 percent of the 111 countries covered by RISE do not have carbon pricing and monitoring schemes in place or require mandatory reporting of greenhouse gas emissions. Where carbon pricing mechanisms are in place they almost always form part of the policy framework for renewable energy and climate action, as reflected in countries' Nationally Determined Contributions.

ADDITIONAL RESOURCES

Regulatory Indicators for Sustainable Energy 2017
Global Tracking Framework 2017
International Renewable Energy Agency
SEforALL Africa Hub
SEforALL Asia-Pacific Hub
SEforALL Latin America and the Caribbean Hub
Clean Energy Mini-Grids HIO
International Energy Agency
The OPEC Fund for International Development
Regional Economic Commissions
GOGLA
ARE

Source: International Energy Agency (IEA) and the World Bank. 2017. "Progress Towards Sustainable Energy: Global Tracking Framework 2017" (April), World Bank, Washington, DC.

ELECTRIFICATION

HIGH-IMPACT COUNTRIES

Countries whose efforts are critical to the achievement of SEforALL objectives globally

Which African and Asian countries have an enabling environment for investment in energy access?

KEY

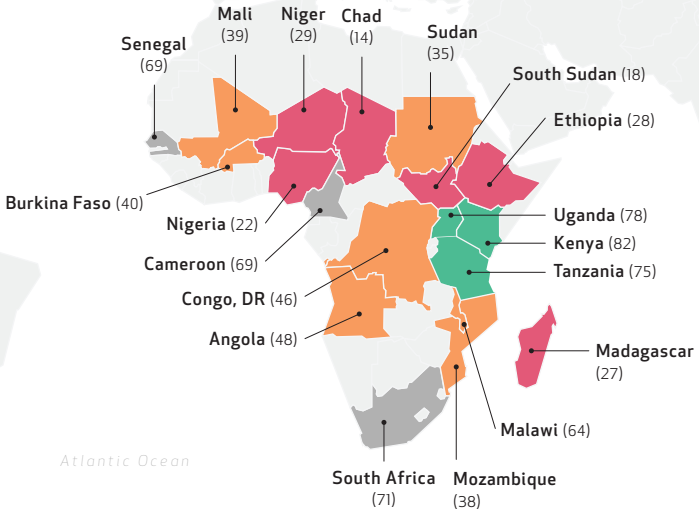
HIGH SCORE (100-67)
Most elements of a strong policy framework to support sustainable energy are in place

MEDIUM SCORE (66-34)
Significant opportunities exist to strengthen the policy framework

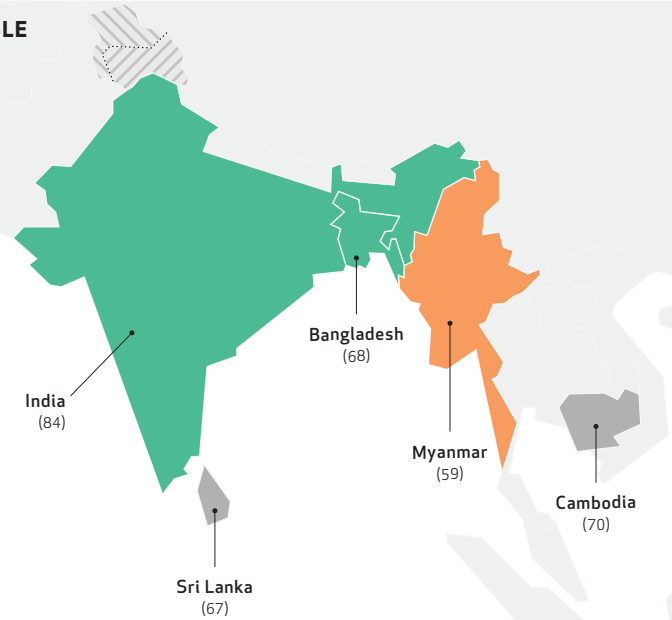
LOW SCORE (33-0)
Few or no elements of a supportive policy framework have been enacted

OTHER HIGH SCORES
Country received a high score on RISE but is not a high-impact country for electrification

REGULATORY INDICATORS FOR SUSTAINABLE ENERGY (RISE) IN AFRICA, OVERALL ENERGY ACCESS SCORE



REGULATORY INDICATORS FOR SUSTAINABLE ENERGY (RISE) IN ASIA, OVERALL ENERGY ACCESS SCORE



Notes: 1. Regulatory Indicators for Sustainable Energy (RISE) is a suite of indicators that assesses the legal and regulatory environment for investment in sustainable energy. 2. Korea, DPR is a high-impact country but it is not shown because there is no RISE data available. 3. The dotted line represents approximately the Line of Control in Jammu and Kashmir by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties. 4. These maps were produced by SEforALL. They are based on the UN Map of the World, which can be found here: http://www.un.org/Depts/Cartographic/map/profile/world.pdf. The boundaries, colors, denominations and any other information shown on these maps do not imply, on the part of SEforALL, any judgment on the legal status of any territory or any endorsement or acceptance of such boundaries.
Source: Regulatory Indicators for Sustainable Energy (RISE), World Bank Group, 2017. Data extracted from http://rise.esmap.org/ on 06/23/2017.

ENABLING POLICIES

HIGH-IMPACT COUNTRIES

Countries whose efforts are critical to the achievement of SEforALL objectives globally

Which countries have an enabling environment for investment in energy efficiency?

QUICK FACTS

- In 2015, about three-quarters of the countries surveyed in Regulatory Indicators for Sustainable energy (RISE) had legislation or an action plan in place to pursue energy efficiency but only two-thirds had fixed precise targets.
- Barely a third of countries have made serious progress in labeling energy-efficient appliances—or establishing building energy codes for construction or minimum energy performance standards for industry.
- In over three-quarters of countries worldwide, the utility is not a creditworthy entity, and most likely unable to fund new investments from its own balance sheet.
- In a context of fast economic growth and sound nationwide electrification plan in the 1990s, Vietnam had successfully implemented load-shedding incentives in order to avoid a shortage of electrical capacity, in collaboration with the public utility as well as large consumers. Vietnam now scores the highest in the energy efficiency pillar among all developing countries.

CONTEXT

- RISE offers policy makers and investors detailed country-level insights on the policy and regulatory environment for sustainable energy across 111 countries globally. It shines light on the need to attach greater political and policy priority to energy efficiency. Many countries have few or no policies in place to support energy efficiency.
- Energy security concerns among high income countries in the 1970s spurred efforts to address wasteful energy consumption. Most of those countries now have ambitious policies and incentivizing regulatory environments in place. Leading scorers among developing countries are in Central Asia, in compliance with ambition levels of the EU Energy Efficiency Directive.
- China started introducing energy efficiency measures in the 1980s to minimize energy imports as the economy expanded rapidly. Ambitious targets were set in its 12th Five Year Plan. The Thousand Companies Energy Conservation Action Plan mandates large energy users to conduct energy audits and report regularly. A mandatory labeling system covers products such as refrigerators, air conditioners, lighting equipment and industrial electric motors. Tax incentives, green bonds, and energy service contracts have been important drivers or consumers.
- RISE suggests an important role for utilities in meeting efficiency, as well as access, objectives because of utilities' in-depth knowledge of electricity consumers' habits and because of their own power consumption. Yet only half of RISE countries require their utilities to undertake energy efficiency measures. There is a clear correlation between scoring well on the utilities indicator and scoring well across the board on all other energy efficiency indicators.
- Since the 2011 Arab Spring, Egypt, Iran, Jordan, Morocco, and Tunisia have undertaken major energy subsidy reforms so as to reduce their fuel dependency and are beginning to let stronger price signals incentivize energy savings.

ADDITIONAL RESOURCES

Global Tracking Framework 2017
Regulatory Indicators for Sustainable Energy 2017
Copenhagen Centre on Energy Efficiency
SEforALL Africa Hub
SEforALL Asia-Pacific Hub
SEforALL Latin America and the Caribbean Hub
Appliances and Equipment Accelerator
Building Efficiency Accelerator
District Energy Accelerator
Lighting Accelerator
Transport and Motor Vehicle Fuel Efficiency Accelerator
Industrial Energy Efficiency Accelerator
International Energy Agency
Energy Efficiency Facilitating Hub (ECCJ)
Regional Economic Commissions

Source: International Energy Agency (IEA) and the World Bank. 2017. "Progress Towards Sustainable Energy: Global Tracking Framework 2017" (April), World Bank, Washington, DC.

ENERGY EFFICIENCY

HIGH-IMPACT COUNTRIES

Countries whose efforts are critical to the achievement of SEforALL objectives globally

Which countries have an enabling environment for investment in energy efficiency?

KEY

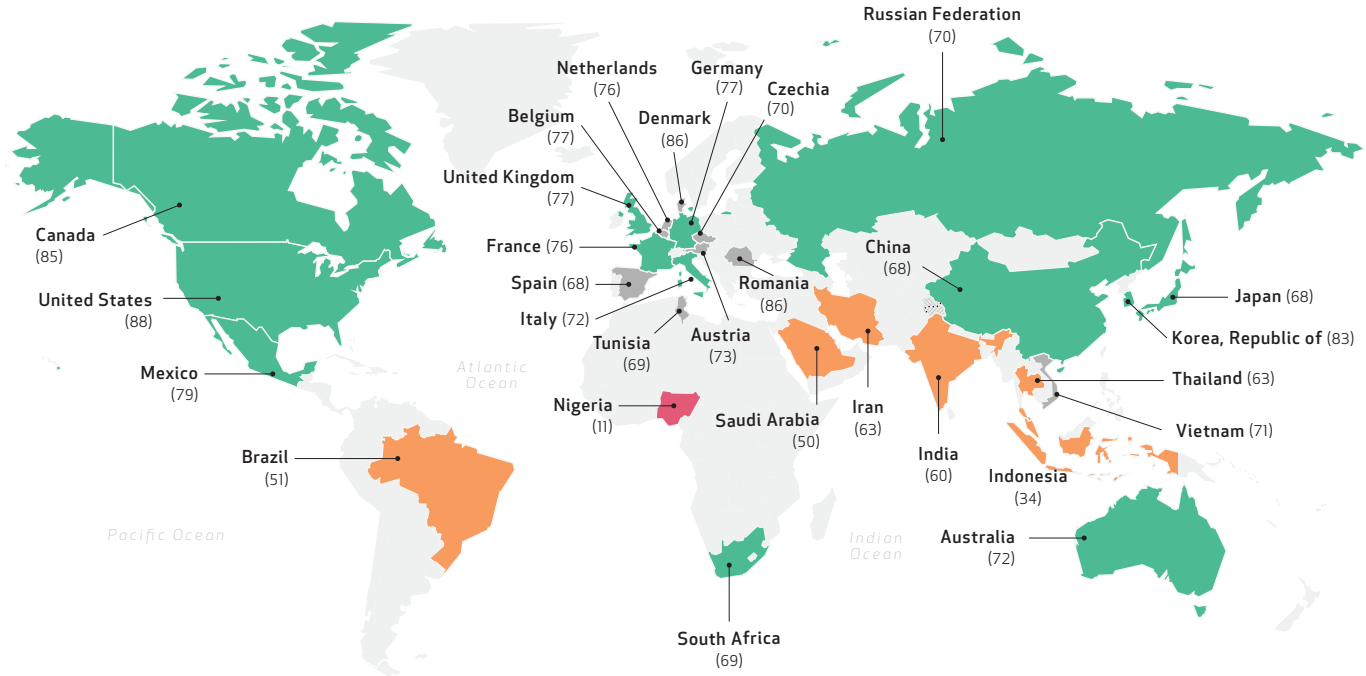
HIGH SCORE (100-67)
Most elements of a strong policy framework to support sustainable energy are in place

MEDIUM SCORE (66-34)
Significant opportunities exist to strengthen the policy framework

LOW SCORE (33-0)
Few or no elements of a supportive policy framework have been enacted

OTHER HIGH SCORES
Country received a high score on RISE but is not a high-impact country for energy efficiency

REGULATORY INDICATORS FOR SUSTAINABLE ENERGY (RISE), OVERALL ENERGY EFFICIENCY SCORE



Notes: 1. Regulatory Indicators for Sustainable Energy (RISE) is a suite of indicators that assesses the legal and regulatory environment for investment in sustainable energy. 2. The dotted line represents approximately the Line of Control in Jammu and Kashmir by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties. 3. This map was produced by SEforALL. It is based on the UN Map of the World, which can be found here: http://www.un.org/Depts/Cartographic/map/profile/world.pdf. The boundaries, colors, denominations and any other information shown on this map does not imply, on the part of SEforALL, any judgment on the legal status of any territory or any endorsement or acceptance of such boundaries.

Sources: Regulatory Indicators for Sustainable Energy (RISE), World Bank Group, 2017. Data extracted from http://rise.esmap.org/ on 06/23/2017.

ENABLING POLICIES

HIGH-IMPACT COUNTRIES

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Which countries have an enabling environment for investment in renewable energy?

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CONTEXT

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ADDITIONAL RESOURCES

Regulatory Indicators for Sustainable Energy 2017
Global Tracking Framework 2017
International Renewable Energy Agency
SEforALL Africa Hub
SEforALL Asia-Pacific Hub
SEforALL Latin America and the Caribbean Hub
International Energy Agency
REN21
Bloomberg New Energy Finance

Sources: World Bank 2017. "Regulatory Indicators for Sustainable Energy. A Global Scoreboard for Policy-Makers", World Bank, Washington, DC. World Bank and Ecofys 2017.

RENEWABLE ENERGY

HIGH-IMPACT COUNTRIES

Countries whose efforts are critical to the achievement of SEforALL objectives globally

Which high-impact countries have an enabling environment for investment in renewable energy?

KEY

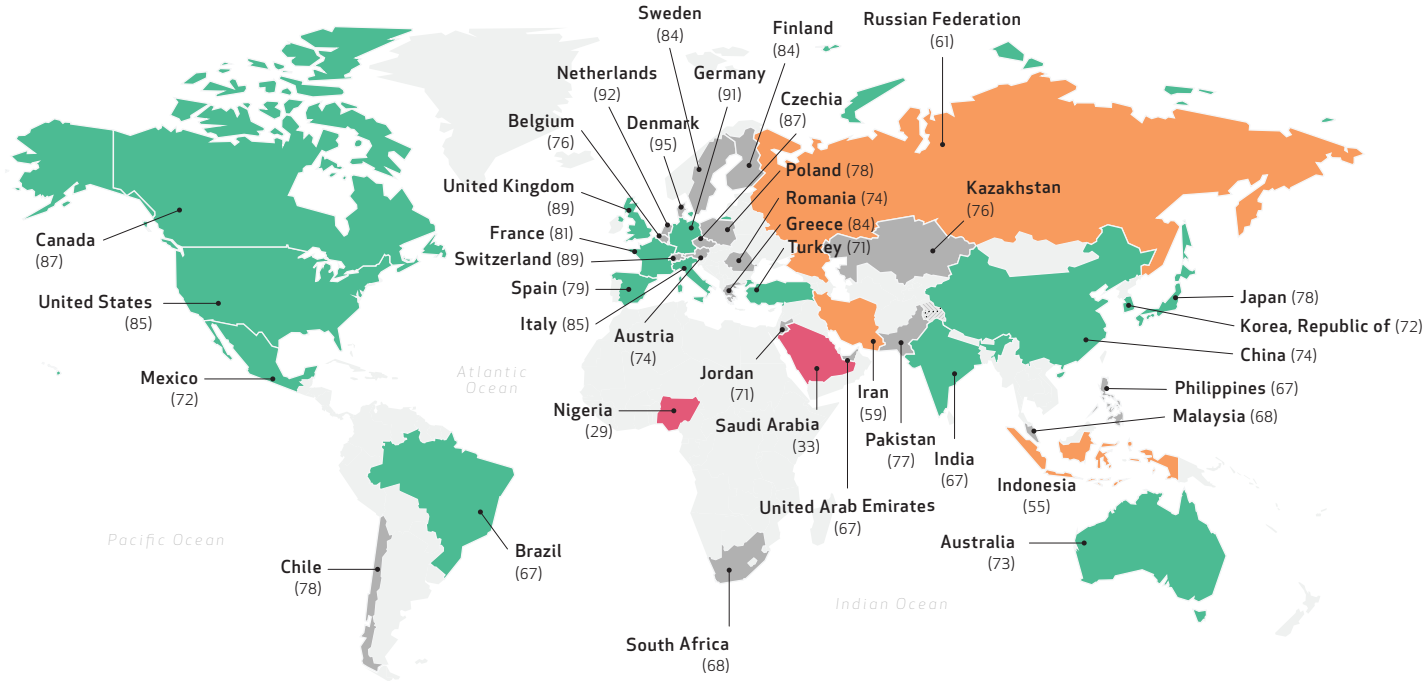
HIGH SCORE (100-67)
Most elements of a strong policy framework to support sustainable energy are in place

MEDIUM SCORE (66-34)
Significant opportunities exist to strengthen the policy framework

LOW SCORE (33-0)
Few or no elements of a supportive policy framework have been enacted

OTHER HIGH SCORES
Country received a high score on RISE but is not in the high-impact country for renewable energy

REGULATORY INDICATORS FOR SUSTAINABLE ENERGY (RISE), OVERALL RENEWABLE ENERGY SCORE



Notes: 1. Regulatory Indicators for Sustainable Energy (RISE) is a suite of indicators that assesses the legal and regulatory environment for investment in sustainable energy. 2. The dotted line represents approximately the Line of Control in Jammu and Kashmir by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties. 3. This map was produced by SEforALL. It is based on the UN Map of the World, which can be found here: http://www.un.org/Depts/Cartographic/map/profile/world.pdf. The boundaries, colors, denominations and any other information shown on this map does not imply, on the part of SEforALL, any judgment on the legal status of any territory or any endorsement or acceptance of such boundaries.
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