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Mobilising Investment for NDC Implementation

Overview - Progress - Emerging Lessons

Webinar 1: May 2019

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Webinar Agenda

- Introduction to Webinar
- Programme Origins - CDKN & LEDS Global Partnership
- Programme Overview
- Country work streams:
 - Bangladesh
 - Peru
 - Ethiopia
 - Kenya
 - Vietnam
 - Philippines
 - Dominican Republic
- Conclusion: Emerging Lessons
- Questions
- Thank you

CDKN - The Climate and Development Knowledge Network

- CDKN is a global climate programme established in 2010 that's worked in over 74 countries and delivered 1100 projects
- Since 2018, led by **SouthSouthNorth** with **Fundación Futuro Latinoamericano** (Latin America hub in Quito), **ICLEI South Asia** (Asia hub in Delhi) and as well ODI in London



Priority countries



From 2018-2021 CDKN is further developing its knowledge and learning programme, supported by the **Royal Netherlands Ministry of Foreign Affairs** and **Canada's International Development Centre**.

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LEDS Global Partnership

LEDS GP Catalyzes Action and Collaboration Across more than 350 Countries and International Organizations and 2500 individual members

LEDS GP SECRETARIAT AND STEERING COMMITTEE



REGIONAL PLATFORMS

Define priorities and conduct peer learning and collaboration



GLOBAL WORKING GROUPS

Provide technical support, training, & tools



National & Subnational Integration



Finance Mobilization



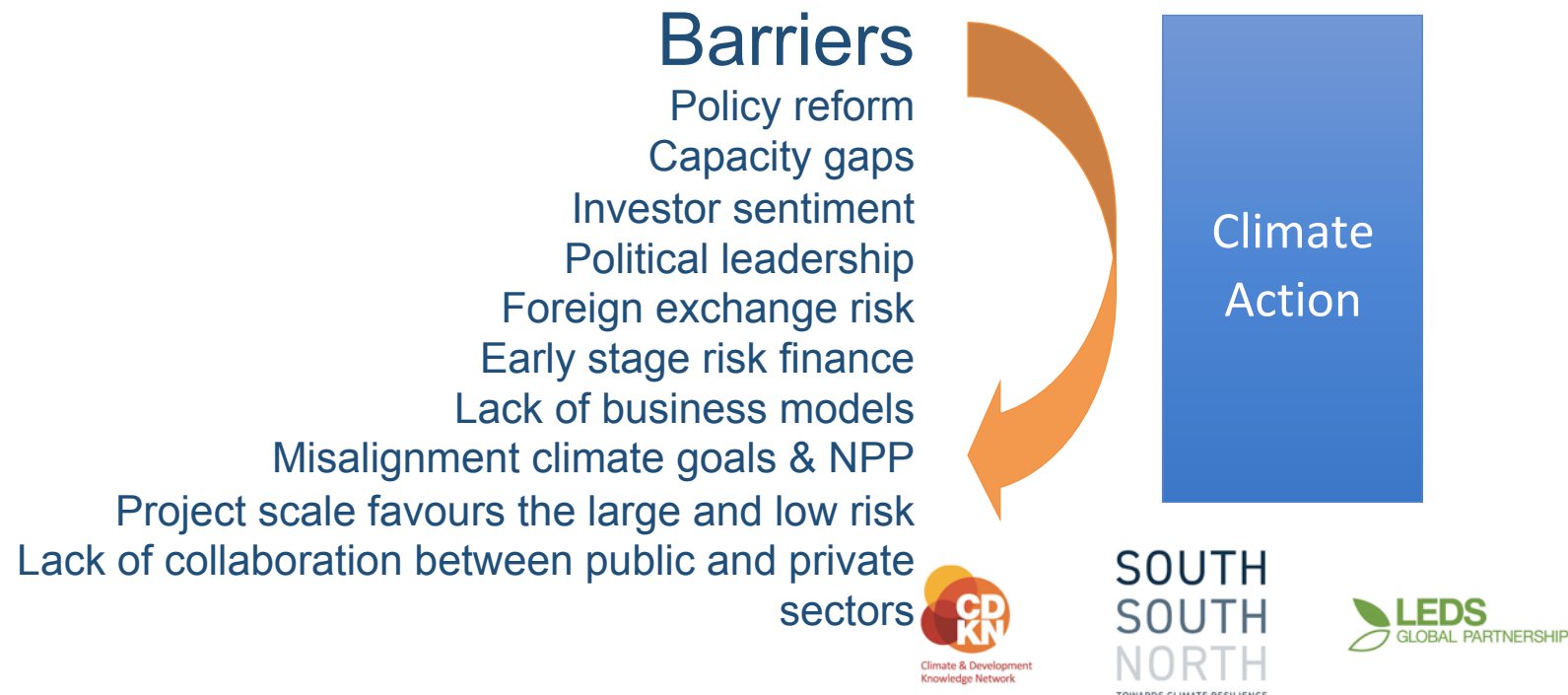
Sectors - AFOLU, Energy, Transport



Climate Finance & NDCs

Resources that catalyze low-carbon and climate-resilient development

- Much of the targets contained in the developing country NDCs are conditional on financial support, technology transfer and capacity building.
- From the perspective of the private sector, the funding and roll-out of NDC programmes has the potential to provide an attractive pipeline of investment opportunities.
- To date, the majority of climate finance has funded mitigation activities although there are indications that adaptation finance is starting to gain traction.



Project Overview

Seven countries across the Americas, Africa and Asia



Project Overview

Sectors and Sub-Sectors

Country	Sector	Sub-Sector
Kenya	Energy	Cooking Fuel replacement: Promoting bioethanol for cooking by displacing kerosene and charcoal using technology and business model innovation
Ethiopia	Energy	Off-grid/Mini-grids: Building capacity & developing financial models to assist stakeholders develop projects
Bangladesh	Energy, transport	Off-grid/Mini-grid, Solar Pumps & Water transport: Developing bankable business models & investment cases for solar mini-grids, solar pumps & solar boats
Peru	Waste - Energy	Waste management & Waste-to-energy: Developing business models & investment cases for landfill gas capture & waste-to-energy.
Dominican Republic	Energy	Energy efficiency and renewable energy: Advancing clean energy deployment through improved grid codes, incentive structures and minimum performance standards
Vietnam	Energy	Renewable energy: Revising rooftop solar regulations & incentives to spur market development (e.g., third party PPAs, net metering, feed-in tariffs, and interconnection processes)
Philippines	Energy	Renewable energy: Updating renewable energy policies that enable corporates to procure renewable energy directly from the generator

Project Overview

Results Framework

Output	Outcome	Impact
1: Specific investment mobilisation measures for a priority sector per country	Create & enhance favourable conditions for private investments in NDCs	Mobilise private finance for NDC implementation
Indicators: - Levers & accompanying roadmaps developed - Targeted decision-makers have increased capabilities		
2: Pipeline for investment in a specific priority sector per country		
Indicators: - NDC investment cases developed and used - Investment forums established or strengthened	Indicators: 1) countries with advanced NDC investment policies and instruments 2) countries with NDC project pipelines developed	
3: Relevant actors scale up and scale out innovation from emergent practice		
Indicators: - Attendees at learning events are ‘satisfied’ - Cases showing evidence of project learning applied		



Bangladesh



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Bangladesh: Overview

Sectors and progress to date:

- Off grid solar energy selected



	Mini Grids	Irrigation Pumps	Boats
Project outputs			
Study of barriers to market development			
Intl. examples of tech upscale			
Business models with short term improvements			
Investment cases for various stakeholders			
Policy and regulatory recommendations to GoB			

Bangladesh: Learning

- To date, 22 solar mini grids and 1,131 solar irrigation pumps have been deployed. They are **mostly sourced through public sector budget or development partners**; funding and financed through government's infrastructure company (IDCOL's) **grant-loan-equity financing schemes**.
- **Private sector is involved as project developers**, and in limited cases private investors such as commercial banks have financed projects where full guarantees have been issued.
- Some factors limiting private sectors' involvement include: **Lack of awareness of investment opportunity, concerns regarding grid expansion, low tariff structures offered by IDCOL, seasonality of irrigation demand and lack of regulations for sale of surplus power.**
- Solar boats is a **nascent technology that needs multiple pilot demonstrations** and technical design studies before it can be deployed in market
- Rate of returns can be improved by using **sensitive and robust analysis** as part of pre-investment decisions. Adopting **anchor-business-customer approach**, stronger customer acquisition and, through lower **operational and maintenance costs**.

Bangladesh: Next Steps

- IDCOL has ambitious plans to finance 200 SMGs by 2025 and to roll-out 50,000 solar irrigation pumps (SIPs) in the next seven years, which means an increasing need to attract commercial finance
- Based on recommendations from the project:
 - Bangladesh's renewable energy authority (SREDA) and IDCOL are working with project developers to explore project development, data gathering and tariff reform challenges
 - SREDA and Power Division are developing a net metering policy and compensation guidelines in lieu of grid expansion
- Commercially viable business models and sound technical designs are being explored for solar boats
- To further improve private investment environment, we will now work with SREDA on a dynamic decision-making geospatial modeling tool to prioritize areas to develop further SIPs, and to prioritize connection of SIPs to the main grid.

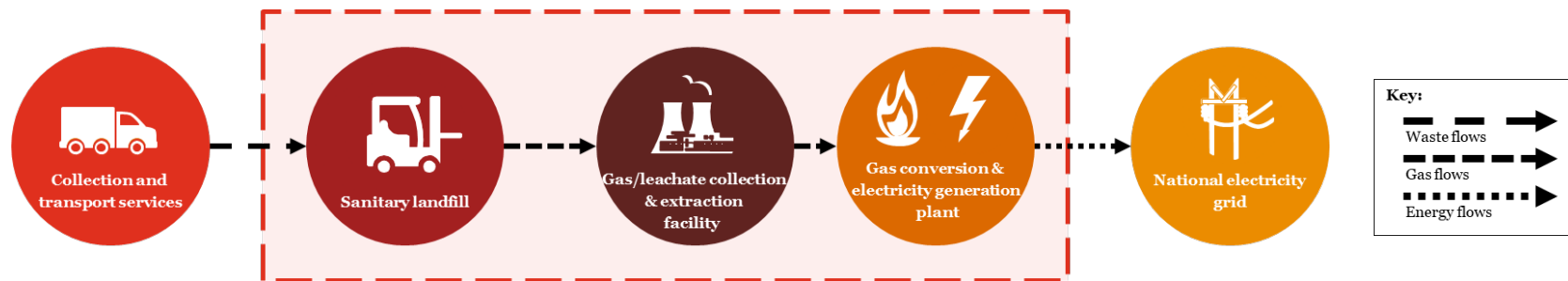


Peru

Peru: Overview

Sectors

- Final disposal of waste



Progress to date

- Concept notes evaluating 3 emissions/leachate reduction technologies at 2 landfill sites: Trujillo & San Juan Bautista
- Investment case for landfill construction & landfill gas capture & energy generation technology @ Trujillo
- Investment case for leachate evaporation technology @ San Juan Bautista
- Analysis and design of investment mobilization measures (IMMs)

Peru: Learnings

- Waste management activities typically managed by municipal governments: large deficit of adequate final disposal solutions & many existing waste disposal sites are **unlined dumps without systems for leachate treatment or landfill gas emissions capture**
- Very limited private investment from & involvement of private sector in waste sector in Peru to date - **no established financial structure for private investment** into waste sector & **lack of awareness of the investment opportunity**
- Government of Peru has developed **plans for construction of 32 landfills** (which meet requirements of the new Law on Solid Waste Management) but many have not secured finance and **none have secured finance from private sector**
- Private sector actors have expressed interest in investing in waste management but feel **municipal governments are reluctant** to cede responsibility to/ collaborate with private sector & are wary of risks associated with public-private infrastructure projects

Peru: Next Steps

- Peru is further behind in the work packages than Bangladesh, largely due to various political situations in Peru that have caused delays over the past year
- Interesting learnings about integrated governance in Peru and challenges around coordination between central and local government actors, public & private actors and even between ministerial departments – learning component of project.
- Private investment promotion mechanisms (e.g work for taxes scheme & renewable energy auctions) exist in Peru but have not been applied to waste management sector and may not be compatible/sufficiently reliable to incentivize private sector investment in current form
- Over the coming months we will analyze and consolidate a short list of IMMs that could reduce barriers to private sector investment in the waste sector
- We will produce an implementation road map which will propose how the IMMs could be developed & applied to improve the bankability of the sanitary landfill projects



Kenya

Kenya: Overview

Sub-sector: clean cooking

- Bioethanol as a liquid cooking fuel can be a viable option in developed countries if the economic conditions allow for the fuel to be competitively priced against other cooking fuels;
- If the bioethanol sector is scaled, it can promote environmental, social and economic benefits to the Government of Kenya while promoting climate change mitigation and adaptation; and,
- The GoK can enable the bioethanol sector through the implementation of policy reform.



Kenya: Progress and Next Steps

Progress to date

- Initial scoping to determine which sectors had the greatest ability to deliver climate benefits and private sector investment; (bioethanol, micro-forestry and mini-grids);
- Engaged Dalberg Consulting to undertake a study on the triple bottom-line benefits (environmental, social, and economic benefits) to shift from dirty cooking fuels to bioethanol. Study allows GoK to make the case for bioethanol as an energy solution.
- 2nd work programme – understanding levers and barriers required to create greater uptake of bioethanol. Policy reform could be delivered by import tariff adjustments, taxation on other dirty fuels and zero VAT rating.

Next Steps

- SSN is supporting a working group made up of various GoK ministries to conceptualize a Bioethanol Master Sector Plan. The plan is envisioned to develop a road map for scaling up the sector allowing for both downstream and upstream components to be understood;
- SSN will be conducting several learning events to assist private sector organizations in their efforts to scale up demand for bioethanol.



Ethiopia

Ethiopia: Overview

Sub-sector: Off-grid/Mini-grids

- Increasing energy access to rural communities continues to be a strategic objective of the GoE;
- The ability of the GoE to improve energy access is limited by financial resources, tariff structures and human capacity;
- Mini-grids could be useful avenue at extending electricity coverage if the private sector can be attracted to these investments;



Ethiopia: Progress and Next Steps

Progress to date

- SSN undertook a detailed scoping study to assess the opportunities for PS investment in Ethiopia;
- A mapping study of the Ethiopian mini-grid sector was also undertaken to understand the “state of play” including policies, regulations and stakeholders involved in the mini-grid sector; and,
- The development of a financial model to assist the GoE with tariff structures needed to mobilize PS and facilitate licensing.

Next Steps

- SSN is currently providing assistance in the form of country-exchanges between Ethiopia and Ghana to facilitate dialogue between sector representatives; and,
- Further work is planned in terms of capacity building for GoE for the licensing of mini-grid programmes and projects.



Dominican Republic



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Dominican Republic: Sectoral Approach

Sub Sectors



- Identified subsector focus on energy efficiency (EE) in commercial & industrial (C&I) sector, in line with govt's NDC and aligned with other govt policies and programs.
 - **Dominican Republic's NDC:** 25% reduction nationally off base year (2013) emissions by 2030 (conditional on external finance)
 - **NDC Action Plan** seeks to increase EE and participation of non-conventional renewable energies (solar, wind, biomass)
 - Alignment with Ministry of Energy and Mines (MEM) **draft bill on EE goal:**
 - 13.2% energy consumption reduction by 2030.
- Multiple consultations with:
 - **Government partners** (e.g., Representatives from: MEM, Superintendence of Electricity, National Energy Commission, Electricity Distributor of the South, Dominican Corporation of Electricity Companies, Climate Change Commission)
 - **Development partners** (GIZ, regional development banks, US Department of Energy, United Nations)
 - **Industry partners** (AIRD, EcoRed, Electricity Cooperative, Large DR Corporations, EE Project Developers, Local Banks)
- Challenges identified and to be addressed:
 - Imported fossil fuel dependency; high energy costs; lack of effective policy and regulatory environment for EE.

Dominican Republic: Progress to Date

Capacity Building with Government Partners

- LEDS and GIZ's Dominican Republic office, brought key govt reps to April 2019, **2-day workshop** at National Renewable Energy Laboratory (NREL) in Golden, Colorado.
 - Govt agencies attending: MEM, Superintendence of Electricity, National Energy Commission, Electricity Distributor of the South, and Dominican Corporation of Electricity Companies
 - Trainings included: 1) Tools for RE deployment; 2) Policies to support distributed generation and community solar; and 3) Approaches to grid integration studies for variable RE.
- Held February 2018 **resiliency planning training** with MEM in Santo Domingo, given recent and expected future hurricanes.
- Participated in December 2017, GIZ/IKI-sponsored, **three-day, Santo Domingo workshop on Carbon Pricing**, RE, and EE development in Latin American and the Caribbean (LAC).

Scoping Net Metering Work

- Provided detailed scope of work to various stakeholders in Dominican Republic interested in:
 1. Analysis of compensation mechanisms, and
 2. Analysis of distributed RE generation's benefits.

Establishing Partnerships with AIRD and EcoRed

- Developed Terms of Reference for partnership among NREL, AIRD, and EcoRed for working with member companies to build capacity for energy efficient investment implementation.

Dominican Republic: Learning

Energy Efficiency: EE investment underutilized despite multiple drivers (i.e. high energy prices).

- Govt/public institutions driven -- Mostly from: **lack of national planning incentives, mandates, performance standards, building codes**, etc.
- Private sector driven -- Mostly from: 1) Developers' working capital deficiencies, 2) **Lack of capacity** to accurately value and assess EE project risks, 3) Recent structural challenges in energy sector, 4) **High interest rates**, 5) **Bank skepticism of longer-loan terms**, and 5) Overall difficult investment environment.

Renewable Energy: Utilities have untapped opportunities to mobilize otherwise limited private sector investments by supporting (ID'd via our Distributed Generation Campaign Study Tour):

- **Interconnection processes and tariffs**,
- Advanced utility rate structures,
- Mechanisms to improve how much power utility distribution lines can convey efficiently,
- Ways to modernize the grid to enable increased penetration of distributed generation, and
- Facilitation of pilot project initiatives with customer sited resources.

Dominican Republic: Next Steps

PURCHASER ENGAGEMENT

- Gather data from industry group member-companies to assess EE business case
- Conduct selected energy audits to confirm investment opportunities

POLICY ENGAGEMENT

- Work with government partners to understand the opportunity to catalyze EE investments through an improved enabling environment
- Coordinate broader clean energy policy technical assistance through GIZ Dominican Republic IKI-supported program
- Work with public sector financial institutions to design EE finance facilities

REPLICATION AND LEARNING

- Conduct training with C&I partners on EE investment business case, methodologies, and tools for replication
- Support regional learning in the LAC through partnership with Clean Energy Ministerial's distributed generation campaign, led by Mexico

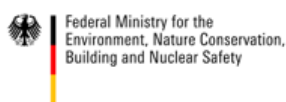


CLEAN ENERGY INVESTMENT ACCELERATOR

The CEIA is co-led by the **World Resources Institute (WRI)**, **Allotrope Partners**, and the **National Renewable Energy Laboratory (NREL)** working across emerging markets, including Vietnam, the Philippines, Indonesia, Mexico, and Colombia.



The CEIA is supported by key partners, including:



Work centers on three essential elements to mobilizing finance for clean energy at scale



Philippines

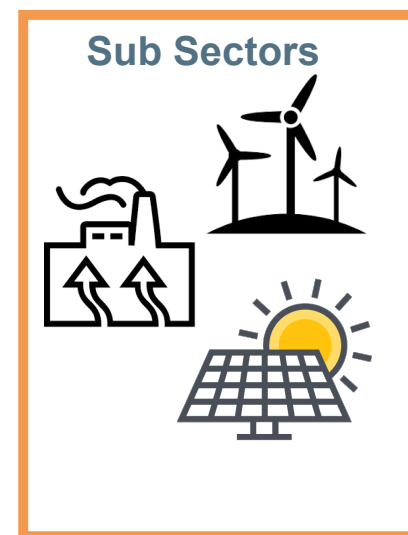


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Philippines: Identifying Sectoral Approach

- Developed a sub-sectoral focus that adheres to the Philippines NDC and other national policies.
 - Philippines NDC: Cut emissions by 70% below business-as-usual (BAU) by 2030
 - Renewable Portfolio Standards (RPS): RE equals 35% of total consumption by 2030
- Challenges
 - Energy (general): Highest energy costs in Southeast Asia; must triple installed capacity in next 20 years; currently, rolling brownouts; 10 GW of new coal planned;
 - Previous RE subsidies were phased out; dry spells impact hydro; 120 distribution utilities to implement RPS
- Extensive stakeholder consultations with
 - **Government and utility partners** (e.g., Department of Energy, National Renewable Energy Board, National Energy Association, Philippines Rural Electric Cooperatives Association, Climate Change Commission)
 - **Development partners** (USAID, GIZ, ICLEI, Building Efficiency Accelerator)
 - **Industry partners** (Santa Rosa companies)



Philippines: Progress to Date

Capacity Building with Distribution Utilities/Rural Cooperatives to meet / exceed new RPS

- CEIA held an **electric cooperative training event** in coordination with La Union Electric Cooperative on RE procurement pathways to meet RPS.
 - Focused on: 1) Contracting options, 2) Recent emerging policies, 3) Mechanisms for fast-tracking distributed generation deployments, and 4) Ways to incorporate grid services from RE into PPAs.
- CEIA also led the **Philippines' first public consultation webinar with the Philippines Department of Energy**, training participants on new Green Energy Option Program (GEOP) and new RPS and explore implications for private sector investment opportunities.

Supporting corporate procurement in Santa Rosa City

- CEIA Philippines team signed **Memorandum of Agreement (MOA)** with City of Santa Rosa following **meetings with the city council**. MOA lays groundwork for direct RE and EE collaboration, and for ongoing partnership with City Environment and Natural Resource Office (CENRO).
- Via CENRO, CEIA reached 60 Santa Rosa businesses and **issued market research questionnaire**.
 - Examined firms' potential interest, perceptions, and concerns with solar and GEOP.
- CEIA in March 2019 hosted 50 city officials and private business stakeholders in groundbreaking public-private Santa Rosa dialogue.
 - Learned about evolving purchasing options and explore initial steps toward clean energy deployment.

Philippines: Learning

- **Significant barriers remain for firms buying onsite generation** (i.e. net metering capacity cap. Third-party financed, onsite projects face significant regulatory and project risks: 1) Rapidly changing policy environment, 2) tax incentive uncertainty, 3) different contract arrangements for different buyer classes, and 4) Cumbersome, complex regulations.
- **Offsite opportunities are emerging**, but uncertainty persists and significant effort required to unlock offsite RE at scale.
 - Power wheeling previously limited to large-load customers. New GEOP policy allows wheeling for demands over 100kW. But implementation date is uncertain. And lack of clarity in key policy details remain.
 - Current wheeling fees vary across distribution utilities and there's no retail supply-rates central platform for transparency. So lack of awareness will remain major barrier once GEOP takes effect.
- **Cities can utilize environmental codes to promote corporate investment** within their districts as well as mandates on government buildings
- **Many distribution utilities are privately owned and often important RE investors**: Invest directly in RE projects (sign long-term contracts with independent power producers, and/ or buy renewable energy certificates (RECs) from qualified projects.

Philippines: Next Steps

PURCHASER ENGAGEMENT

- Support **companies in Santa Rosa** to identify viable procurement options; focus effort into actual implementation
- Develop **RPS planning tool** enabling distribution utilities and rural cooperatives to assess, on rolling basis, how much RE they must procure

POLICY ENGAGEMENT

- Share **policy updates with, and gather inputs from, Santa Rosa businesses** in anticipation of GEOP implementation
- **Build capacity among rural cooperatives to meet new RPS requirements** through train-the-trainers program
- Work with DOE and ERC to communicate learnings from engagement with corporate RE buyers and distribution utilities / rural cooperatives

REPLICATION AND LEARNING

- Document and share learnings from Santa Rosa, focus on results on implementation
- Engage with Building Efficiency Accelerator to explore corporate investment opportunities that combine EE with RE
- Share learnings from Philippines across other SE Asian markets at the end of the year



POWERING VIETNAM'S CLEAN, SMART, AND SECURE ECONOMIC GROWTH

NGUỒN ĐIỆN CHO TĂNG TRƯỞNG
KINH TẾ SẠCH, AN TOÀN VÀ THÔNG MINH
TẠI VIỆT NAM



Vietnam



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Vietnam: Identifying Sectoral Approach

Focusing on energy subsectors identified in Vietnam's NDC, Renewable Energy Development Strategy (REDS), Green Growth Plan, and other national policies

- Goal is to reduce greenhouse gas (GHG) emissions 8% by 2030 (Energy = Key mitigation sector):
 - With international support, goal increases to 25%.
- REDS: "increase the electricity output produced by renewable sources from approximately 58 billion kWh in 2015 to 101 billion kWh by 2020, and 186 billion kWh by 2030"

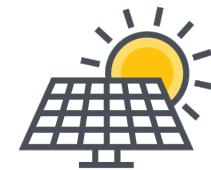
Challenges

- Rapidly increasing electricity demand driven by economic growth; limited ability by state-owned utility to meet all investment directly;

Developed partnerships with

- **Government** (e.g., Electricity and Renewable Energy Agency, Ministry of Industry and Trade (MOIT), Ministry of Planning and Investment)
- **Development partners** (USAID, GIZ, GGGI, P4G)
- **Industry partners** (Renewable Energy Buyers Alliance, various multinational companies, developers, investors, industrial parks)

Sub Sectors



Vietnam: Progress to Date

Decision-makers developed specific investment mobilization measures for priority sectors

- Provided key technical input and market intelligence for **Rooftop Solar (RTS) Study for Vietnam's Electricity and Renewable Energy Agency (EREA)** in partnership with USAID's Vietnam Low Emissions Energy Program (V-LEEP). Study, via interviews with 5 industry stakeholders to help EREA understand existing barriers to investment in RTS, conducts: 1) Market, regulatory, and policy analysis; 2) SWOT analysis; and 3) case studies.

Pipeline for investment in specific priority sectors developed and expanded:

- **Supported AMATA industrial park with 100 kW RTS project.** Developed Request for Proposals (RFP) including technical requirements and bid procedures based on site and needs assessments. CEIA advised on bids and supported a final purchase decision.
- **Developed RFP for Unilever** for purchase of ~1 MW RTS system. Anticipate reviewing and advising on bids received and supporting the development of term sheet for system's purchase and installation.
- **Developed Memorandum of Understanding (MOU) and workplan with Global Green Growth Institute (GGGI)** to explore synergies with private sector investment promotion in PV projects and GGGI's efforts to establish innovative third-party project financing facility.

Relevant actors scale up and scale out innovation from emergent practice

- Presented on CEIA business model and capabilities at **Partnership for Growth (P4G) Summit**, met with project partners and investors on policy improvements, and provided inputs on the enabling environment for high level dialogues with Prime Minister of Vietnam.
- **Developed self-screening tool** for potential C&I buyers seeking to assess project viability at their facilities.

Onsite renewable energy generation for self-consumption:

- Onsite generation is currently the **only option** for corporate buyers in Vietnam, but it is limited by policy and other barriers.
- Retail and net metering tariff structures encourage onsite RTS systems **sized exclusively for “self-consumption”** so full roof space is rarely maximized.
- **Net metering is lacking:** Solar net metering passed in 2017, but Vietnam’s govt and national electricity company (EVN) implementation have been ineffective due to lack of EVN training and lack of accounting and tax clarity from Ministry of Finance (fewer than 5 C&I systems have successfully secured net metering benefits and these are individually negotiated deals).
- **Difficult to license and permit** RTS systems larger than 1MW
- **Lack of market information** limits ability to implement and scale onsite RE projects

Offsite renewable energy generation for self-consumption:

- **Offsite power purchasing is not yet available** to corporate buyers. Major policy changes still needed.
- **Wheeling is not allowed:** Using grid to wheel power from independent power producers to corporate off-taker isn’t permitted. EVN and subsidiaries are only legal power purchasers.
- No nationally-sanctioned RECs market exists. Only very few private RECs deals to date.

Vietnam: Next Steps

PURCHASER ENGAGEMENT

- CEIA will continue to: 1) disseminate market knowledge, 2) to **guide buyers through procurement process**, and 3) facilitate onsite RTS pilot projects. Doing so, directly supports:
 - **Single buyers** (i.e. Unilever, Heineken),
 - **Aggregated pools of buyers** (i.e. AMATA Industrial Park).

POLICY ENGAGEMENT

- CEIA will continue to **bring corporate voices into policy process** to demonstrate demand, convey barriers, and promote balanced policies that improve investment.
- CEIA, in collaboration with USAID V-LEEP, is conducting **extensive review and analysis** at the request of MOIT to **revise National Rooftop Solar Policy**

REPLICATION AND LEARNING

- Continue CEIA working group (Previously “REBA Working Group”). **Brings together over 50 C&I companies**, developers, investors, and government officials to educate on procurement options, business models, lessons learned, and new regulations and policies.
- Develop a Vietnam corporate buyers’ guidebook.

Emerging Lessons

- This is a complex ecosystem and policy represents a leverage point. Policy certainty is important for the private sector.
- Capacity gaps exist in all countries – part of our role is to address these gaps.
- Committed political leadership at all levels is required to drive the policy and implementation changes.
- Use public finance to catalyse private sector investment – we see this in Bangladesh with IDCOL's favourable terms for project debt finance Public finance can also be in the form of tax incentives as we see in Kenya.
- Public sector competing with private sector - Crowding out can occur when government-funded development projects discourage private enterprise from taking place
- Energy sector business models are more mature and easier to fund. We need to ensure that other sectors receive funding.

Questions

