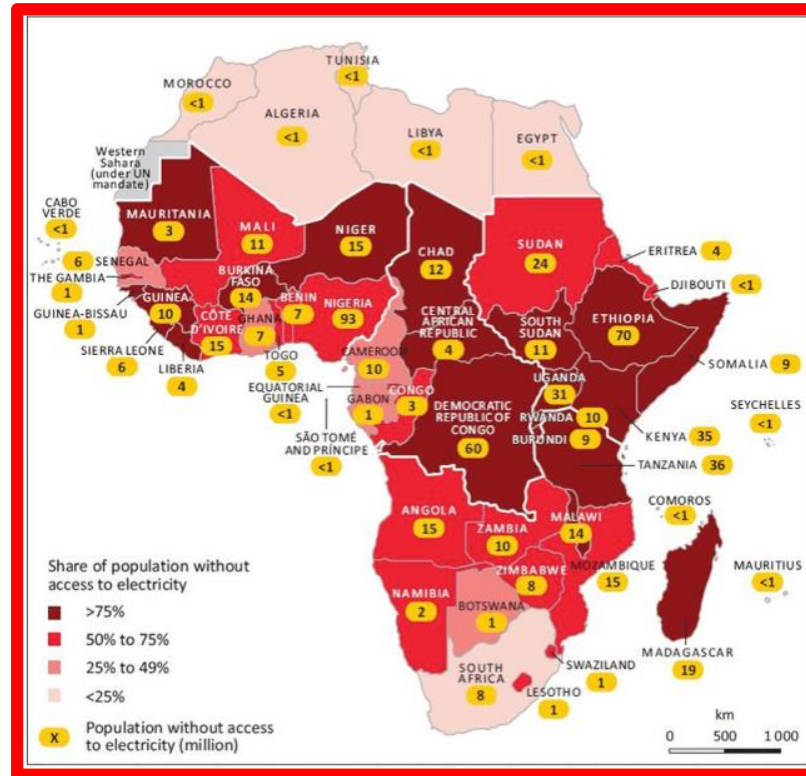




Renewable Energy in East Africa

March 14, 2018

Challenge or Opportunity?

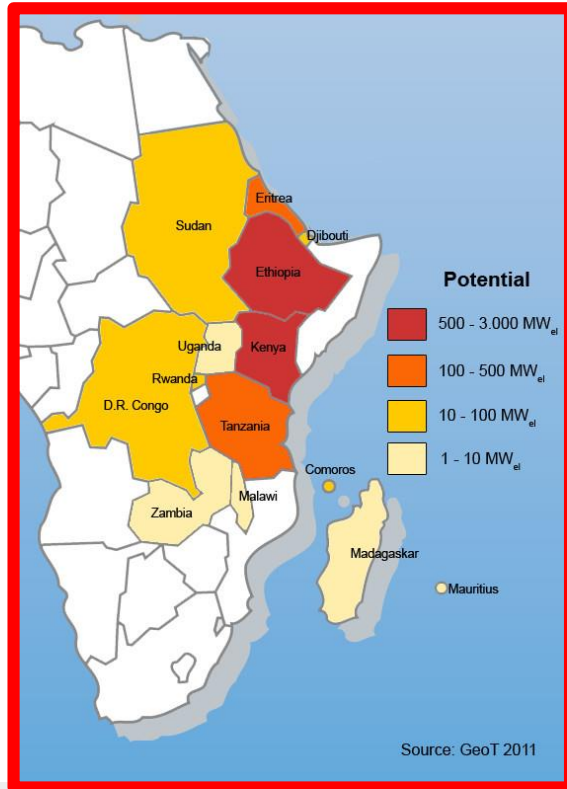


East Africa has a booming middle class and a growing thirst for electricity.

Most countries have electrification rates below 40%

Major room for expansion.

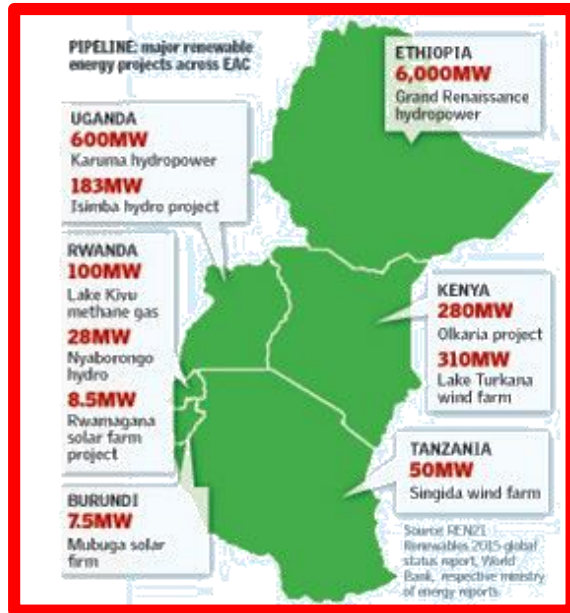
Good potential for additional capacity



Both in terms of natural resource (solar, wind, geo, hydro) there is significant potential to install renewable energy power plants

Kenya, Ethiopia, Tanzania and Uganda in particular are poised for growth in the power sector

Renewable Energy Pipeline in East Africa



Almost all the countries in East Africa indeed have significant pipeline of renewable energy projects

Wind power, solar and hydro are the leading technologies of clean energy solutions

Speed bumps ahead

Country	hurdle
Sudan	Still isolated from financial (debt) markets due to gov't arrays exceeding \$50bn
Ethiopia	In state of emergency; medium-term looks rosy
Kenya	Lack of funds, shrinking demand, fragile grid
Malawi	Tiny grid, limited funds, regulatory constraints
Tanzania	Huge potential but weak appetite from GoT
Rwanda	Investor-friendly small market, facing over-capacity
Uganda	Limited growth opportunities for renewables
Burundi	Very small grid, lack of framework

Despite the huge thirst for power and the vast natural resources available, there are hurdles that remain and which should be seriously evaluated before any investment is made.

Thank you!



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