



FDI FROM EUROPE INTO NORTH AMERICA

RENEWABLE ENERGY OPPORTUNITY

Market Investment Potential for Economic Agencies

IEDC Presentation
24 September 2007

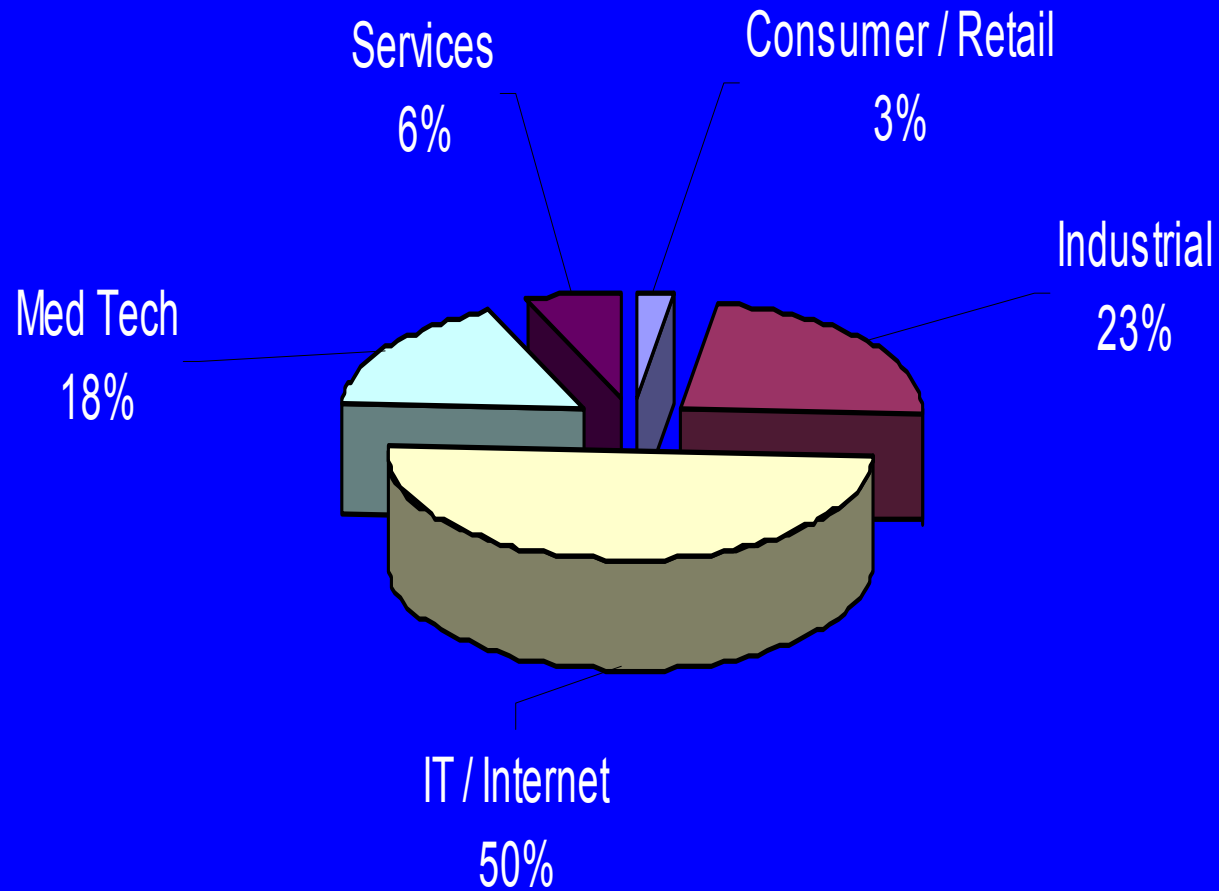


Paul Wright
Director
Oxford Intelligence
Tel: +31 6 15010498
Email: paul.wright@oxint.com

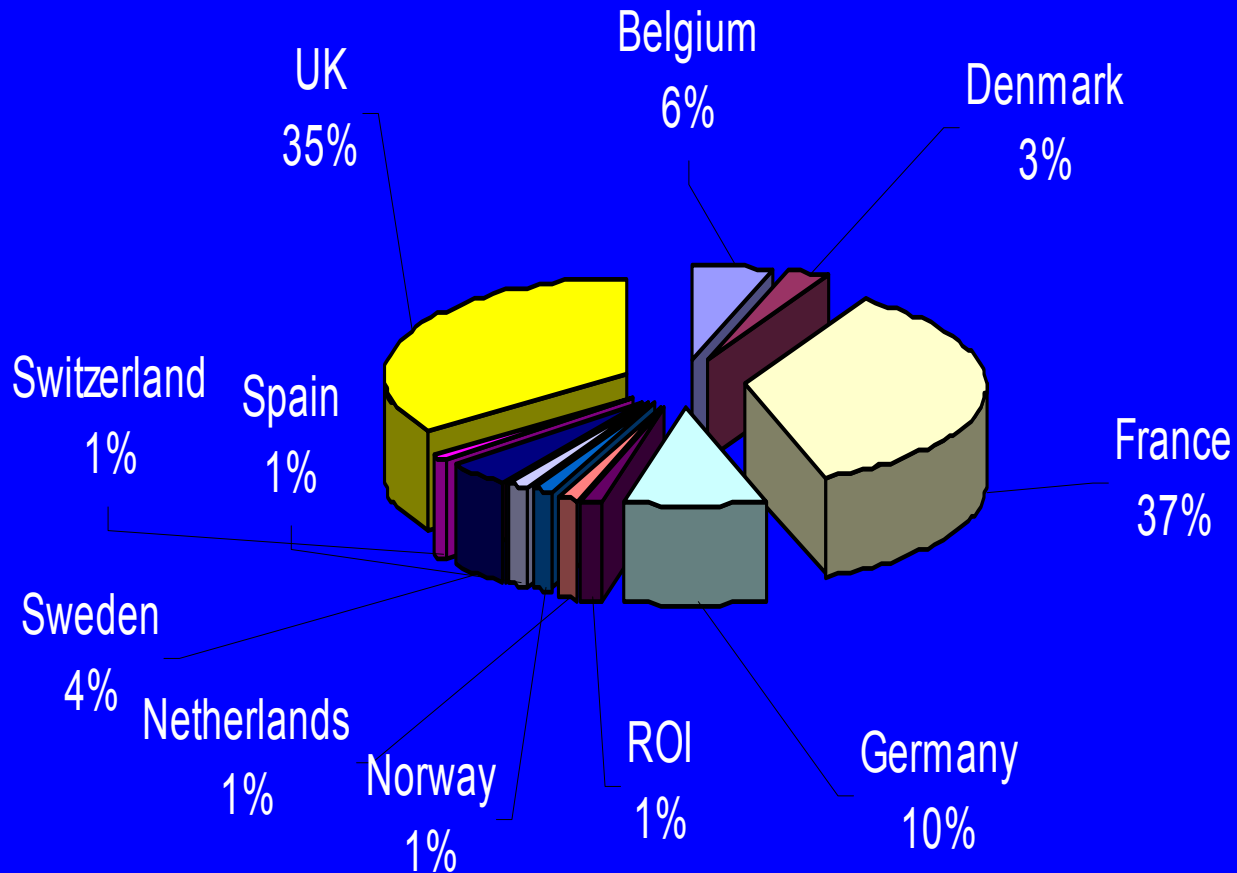
A review of future investment trends from Europe into N America

- OI carries out bespoke interviews of CEOs regarding their FUTURE investment strategy
- European Corporates into N America

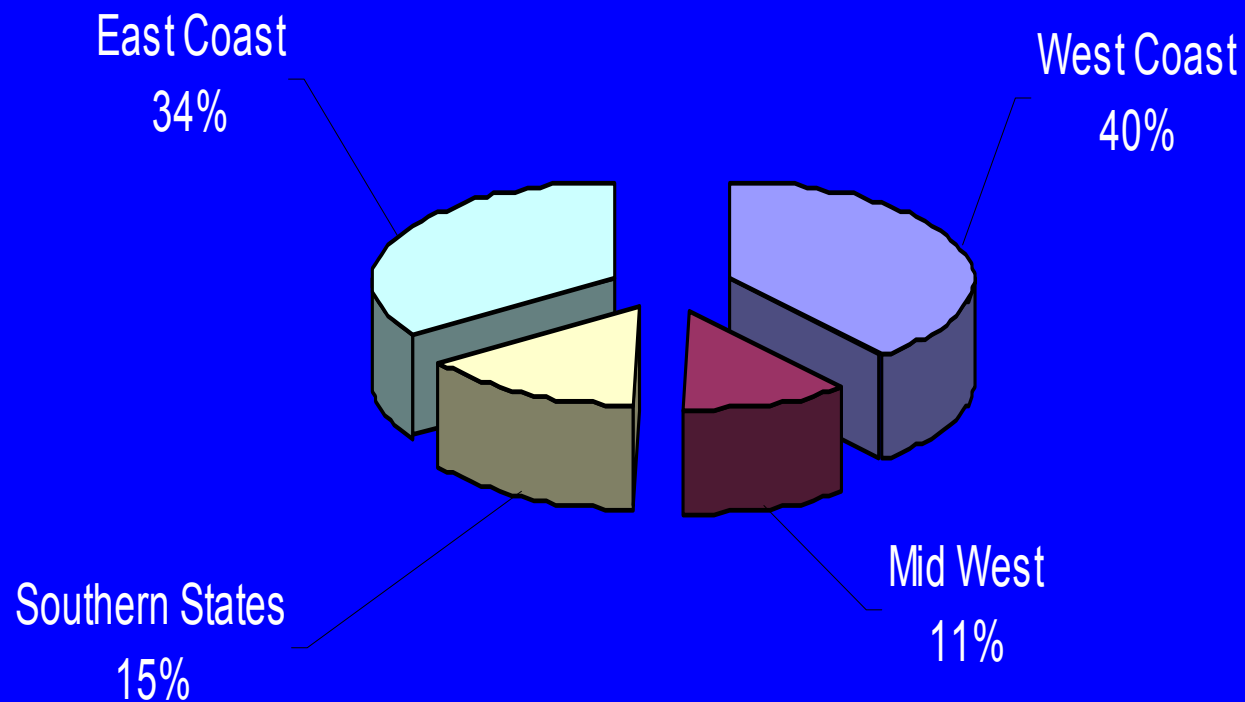
Europe into N America by Sector



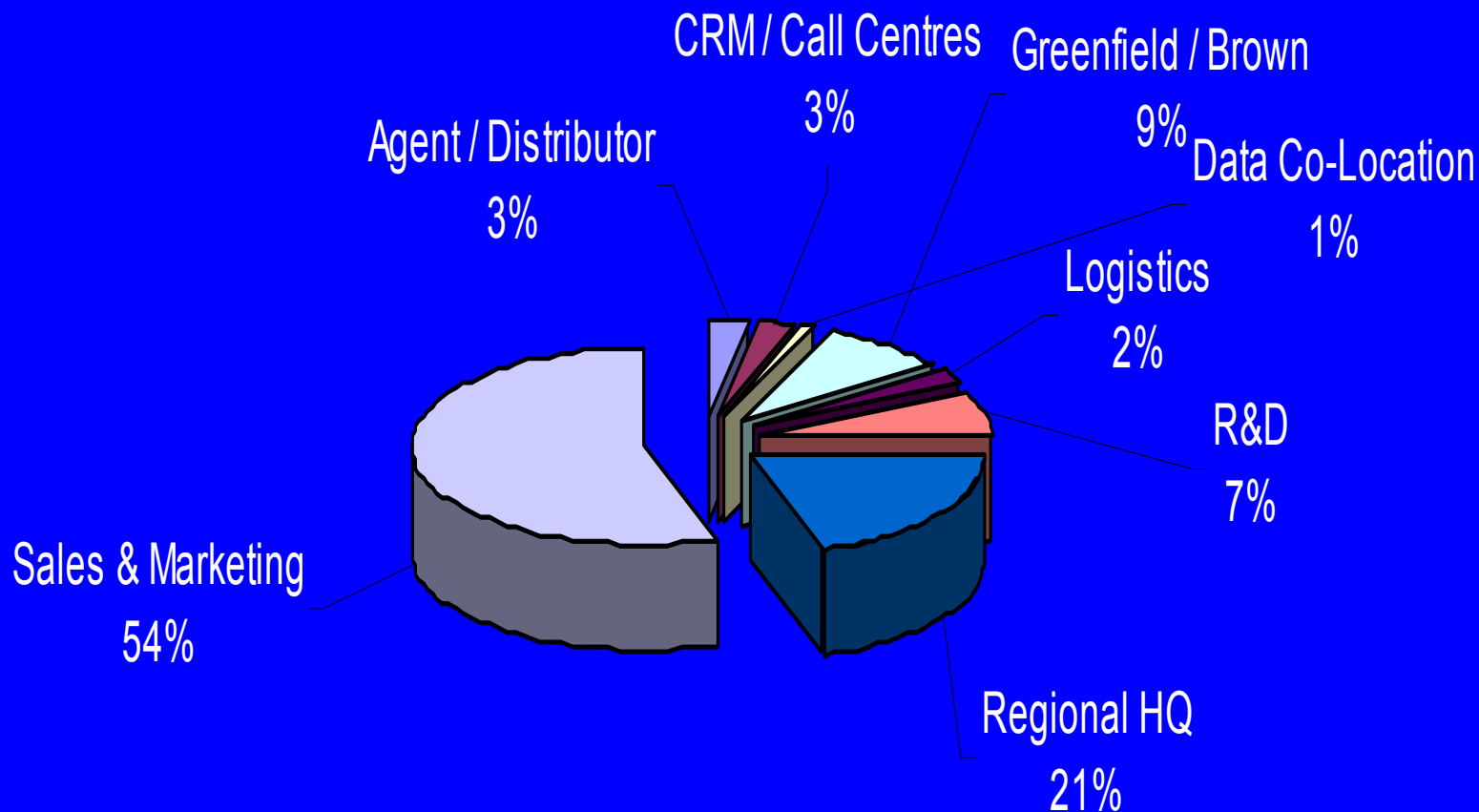
Europe into N America by Donor Country



Europe into N America - by Destination



Europe into N America by Activity



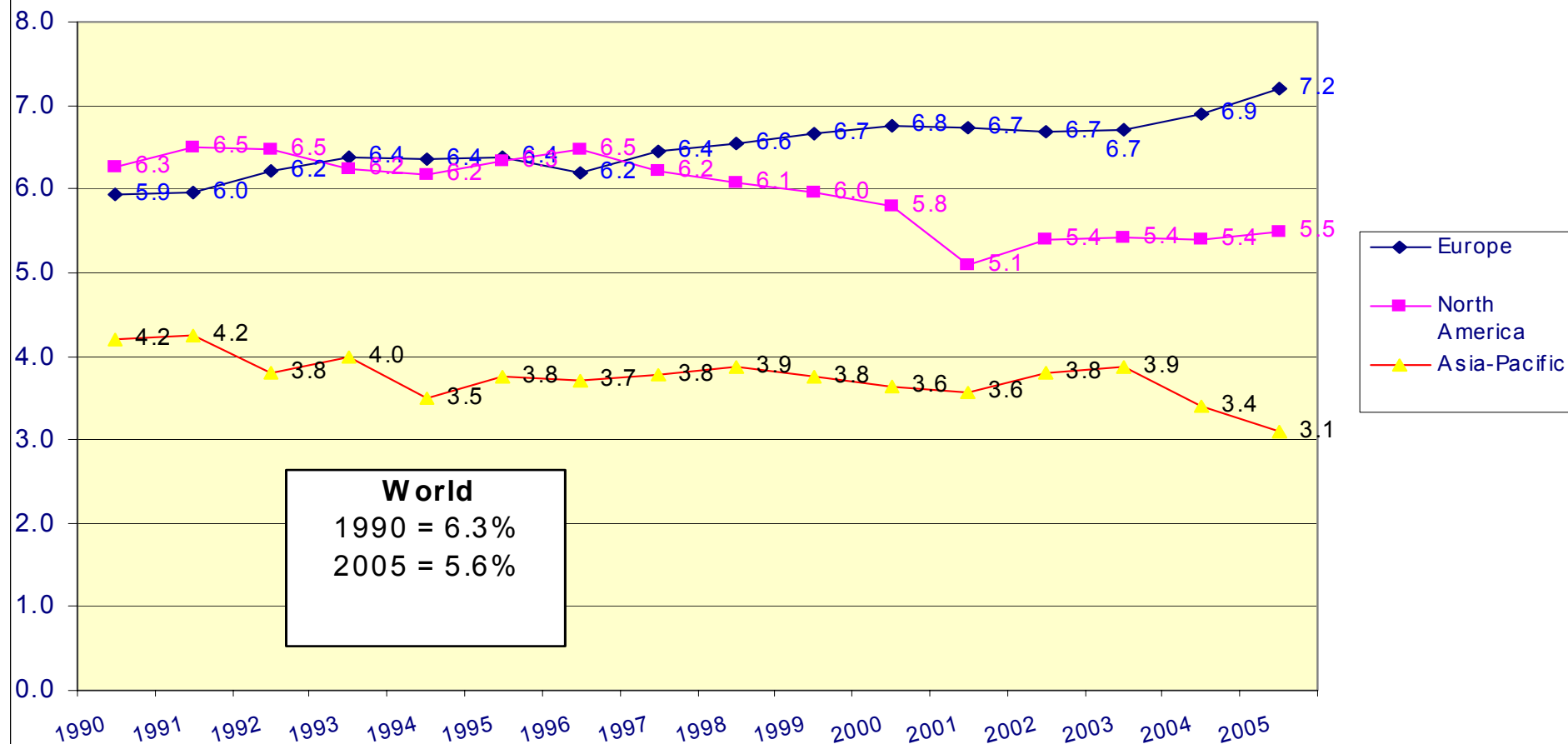
FDI and Renewable Energy



- By 2030, developing countries, led by China and India, will account for two thirds of the growth in energy demand.
- In Europe employment in renewable energy will grow from 0.2 million people to 1 million by 2010 and to 2 million by 2020.

Renewable Energy by Global Region

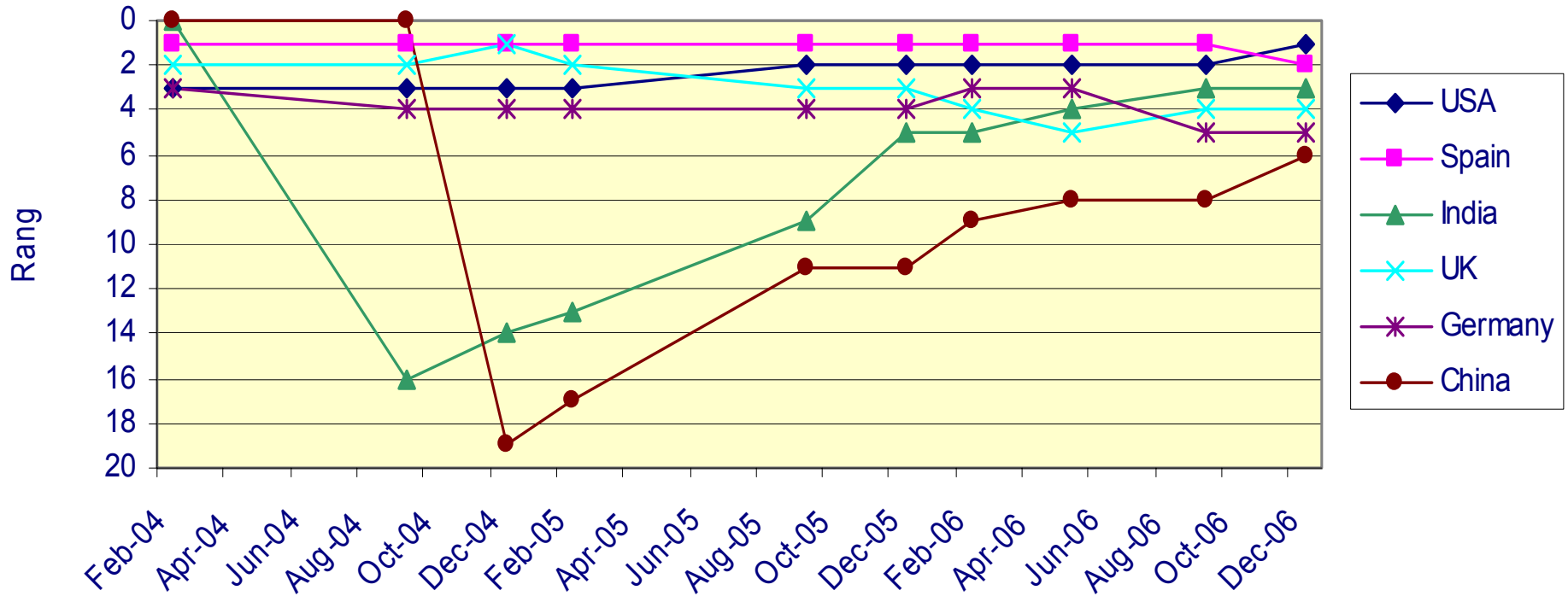
Renewables' Share in TPES by Major World Regions(%) 1990-2005



Source: Oxford Intelligence based on IEA data 2006

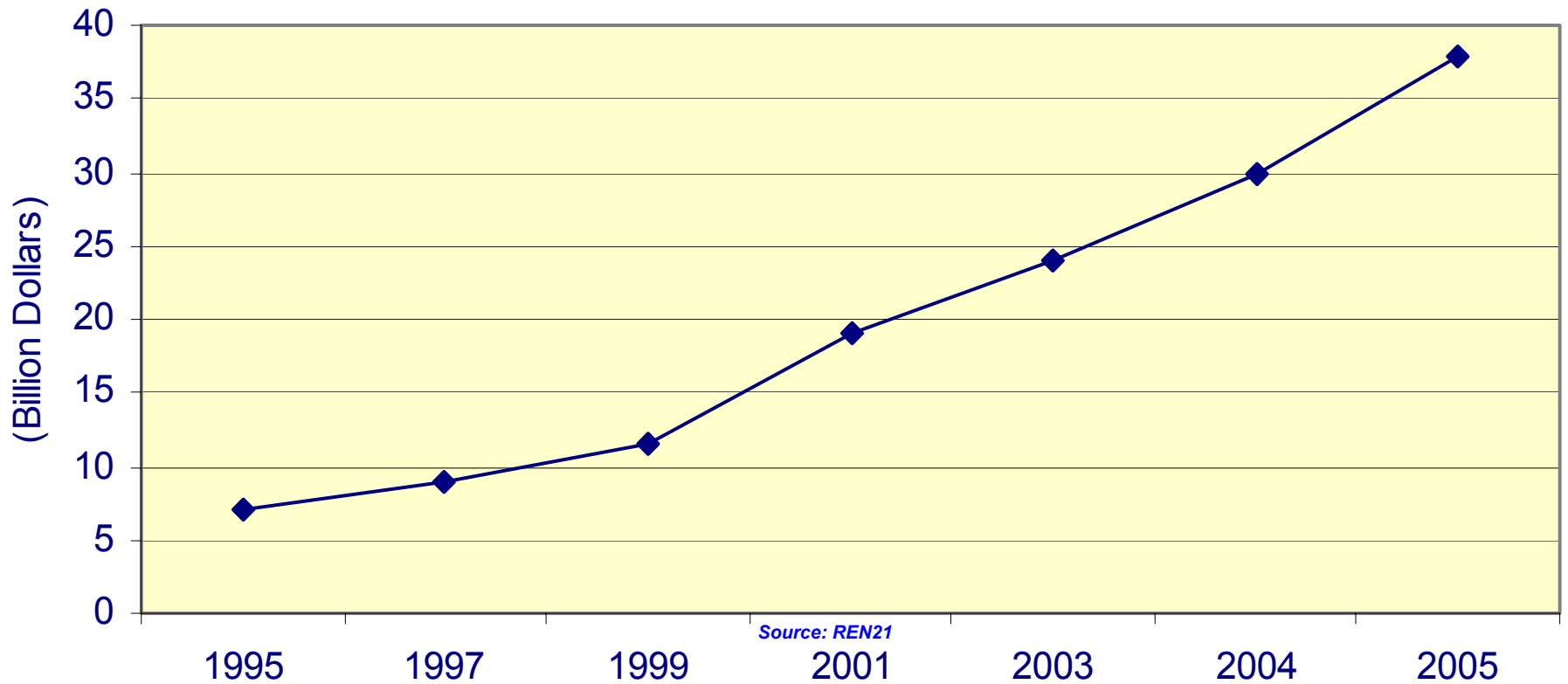
Renewable Energy - Country Attractiveness

Development of Major Countries based on Ernst & Young's Country Attractiveness Indices



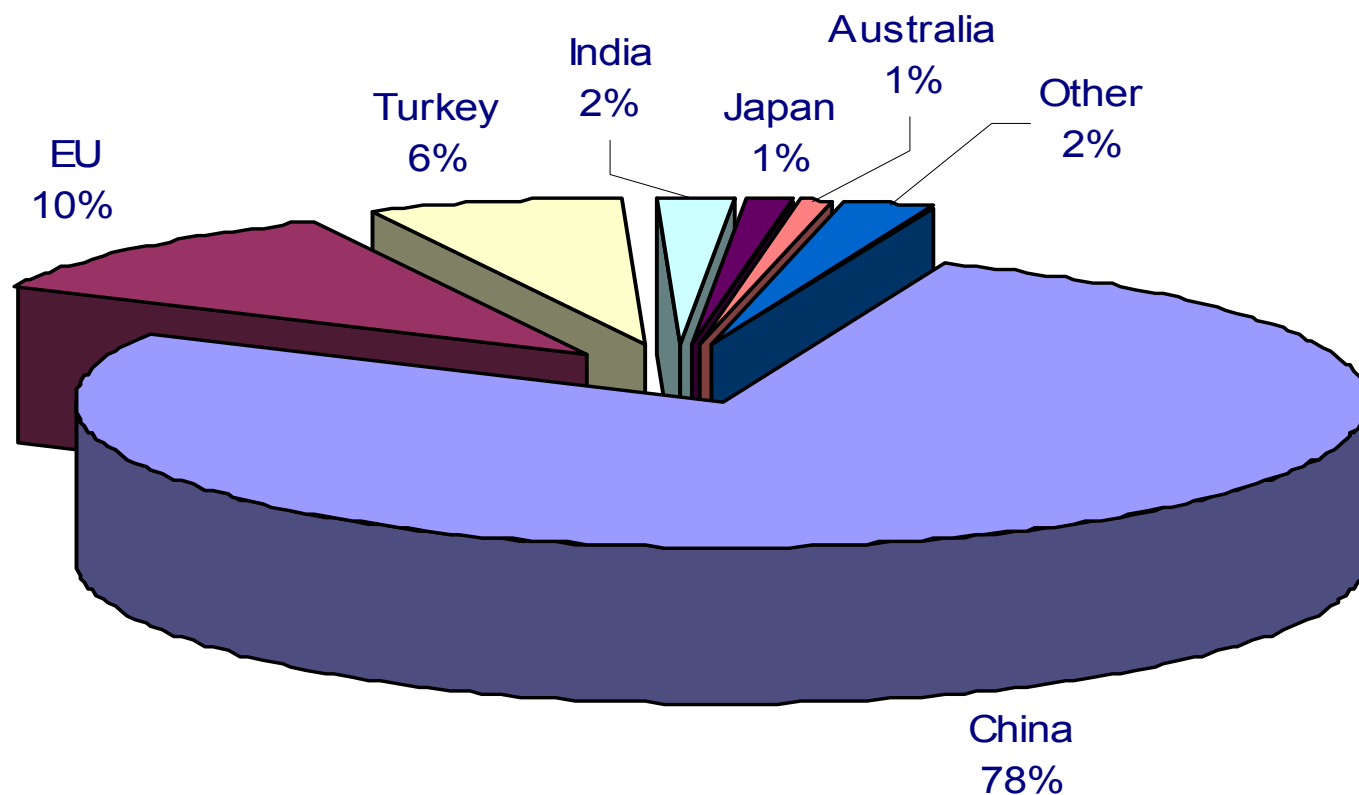
Renewable Energy - Scale

Annual Investment in Renewable Energy 1995-2005



Selected RE Sectors – Solar Hot Water

Solar Hot Water/ Heating Capacity added in 2005 (GWth)



Source: Oxford Intelligence based on REN 21 data 2006

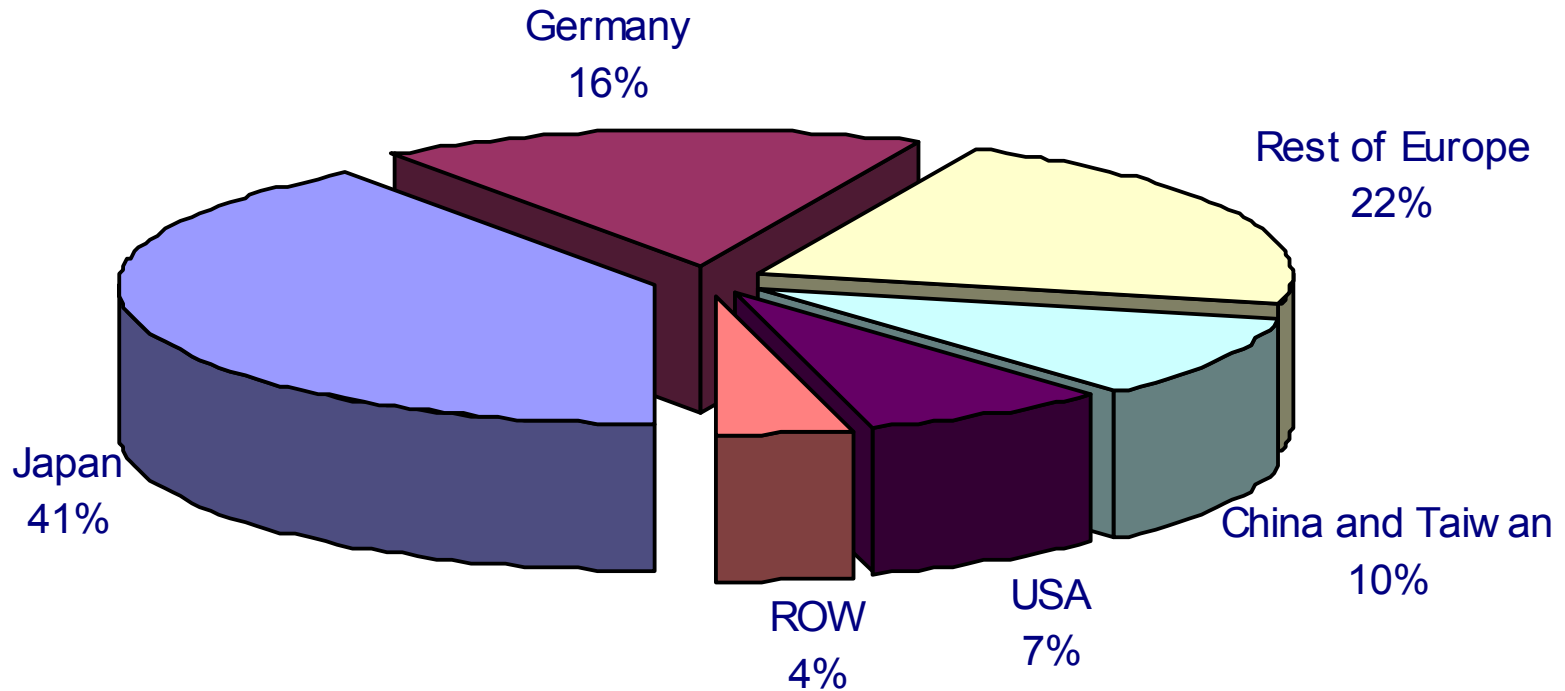
Selected RE Sectors – Solar Thermal Power Plants

Solar Thermal Power Plant Market by Regions – Key Results (MW)				
Year	2010	2015	2020	2025
OECD Europe	600	1,200	2,400	4,500
OECD NorthAmerica	1,054	3,354	8,054	15,354
OECD Pacific/Australia	100	500	1,000	2,000
Latin America	20	100	800	3,000
South Asia / India	30	100	500	1,500
China	50	200	700	1,500
Middle East	200	800	2,100	5,000
Africa	100	200	1,300	4,000
Total	2,154	5,255	16,854	36,854
Total jobs	12,036	18,880	33,040	54,280

Source: Greenpeace, ESTIA and IEA SolarPACES

Selected RE Sectors – Solar Voltaic

Geographic Distribution of PV Cells Production in 2005 (MWp)



Source: Oxford Intelligence based on Photovoltaic Barometer 2006

Selected RE Sectors – Solar Voltaic

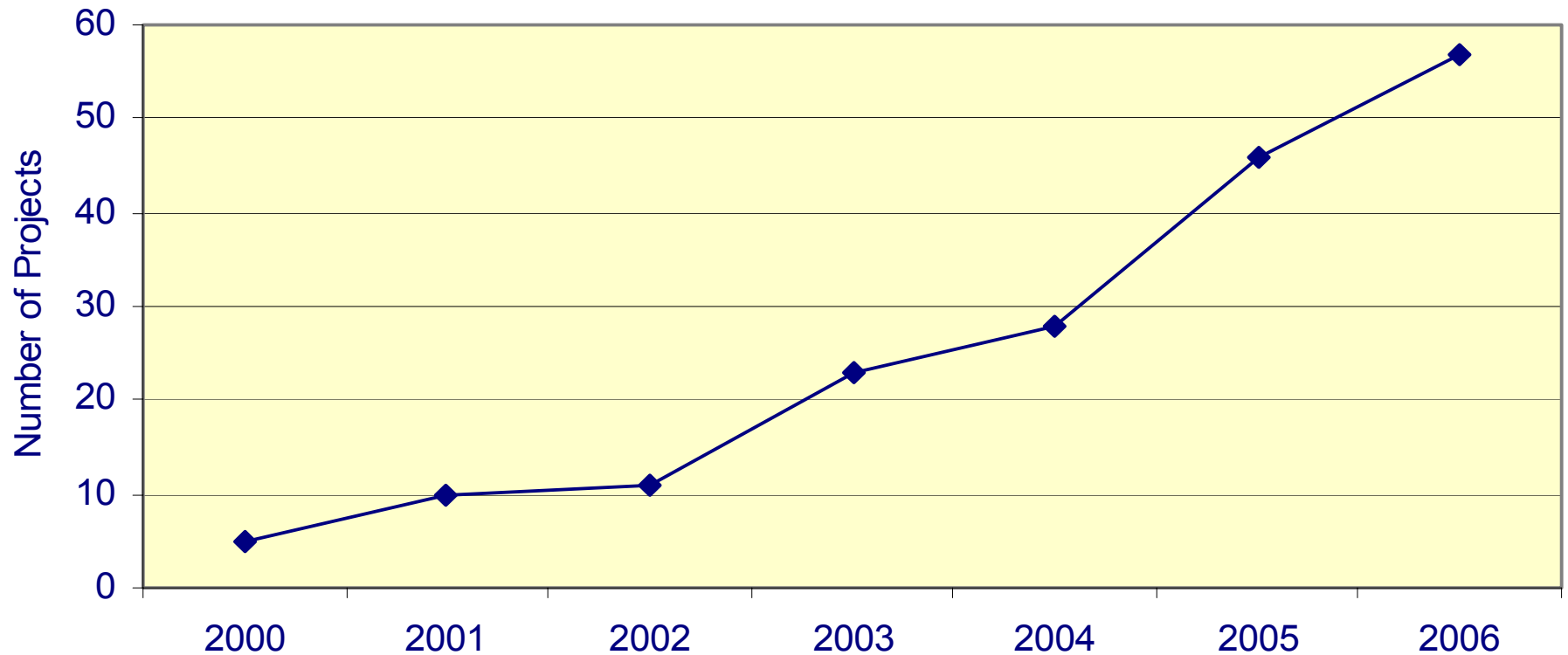
The Greenpeace/EPIA "Solar Generation" Scenario - Key Results	
Global Solar Electricity Output in 2020	282 TWh repres. 10% of EU-25 electricity demand in 2003 repres. 1.1% of global electricity demand
Global Solar Electricity Output in 2040	7,442 TWh repres. 21% of global electricity demand
Detailed Projections for 2020	
PV systems capacity	205 GWp
Grid connected consumers	93 million worldwide 31 million in Europe
Off-grid consumers	950 million worldwide
Employment potential	2.25 million full time jobs worldwide
Investment value	62 billion euros per annum
Prices fro grid connected PV systems	Reduction to 2 euros per Wp
Cumulative carbon savings	730 million tonnes of CO2

Other Technologies

- BioFuels grow from 37b litres to 70b in 2010 and 120b in 2020
- In 2010 this would require 60% of US Soya crop and over 100% of EU rapeseed crop.
- European BioMass investment between 2001 and 2010 will be €44 billion – creating some 340,000 jobs
- Wind Energy increased 24% in 2005

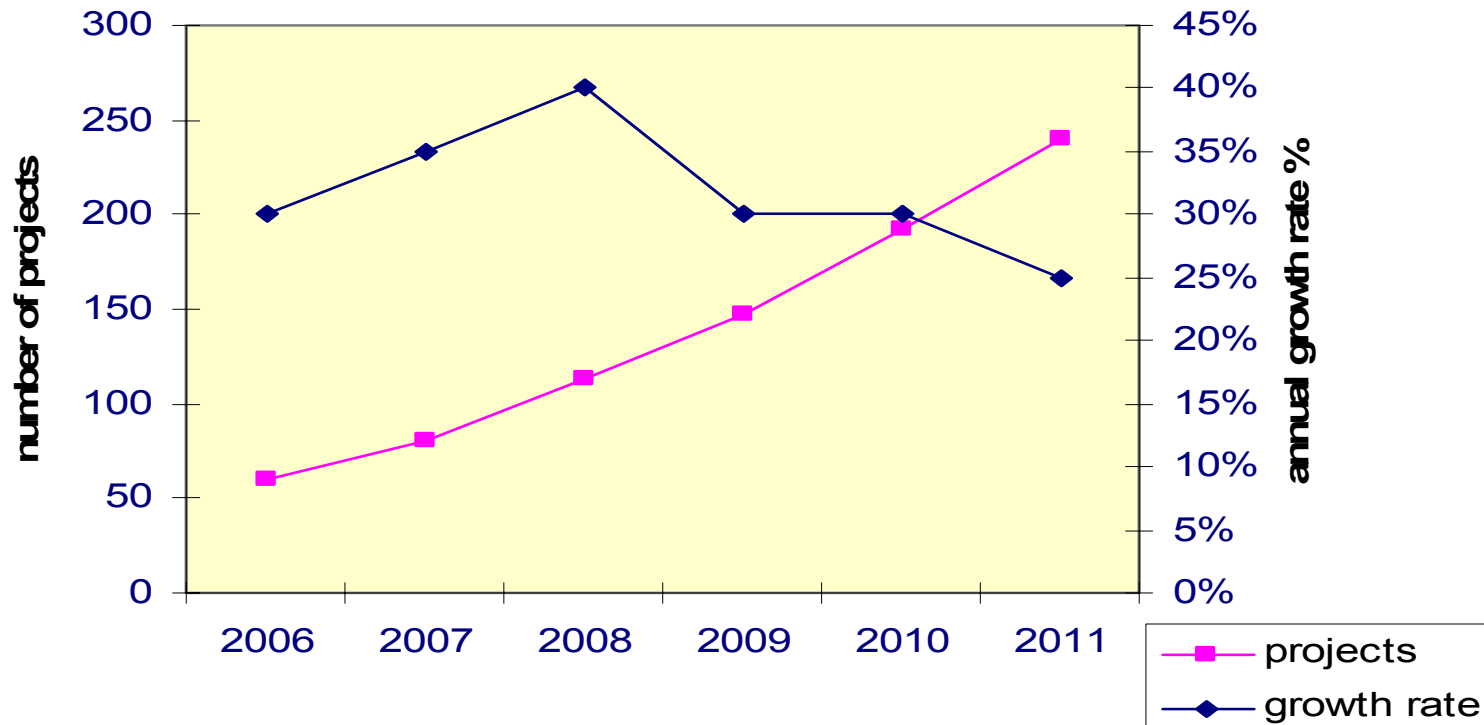
RE – FDI Development

FDI Development from 2000 to 2006



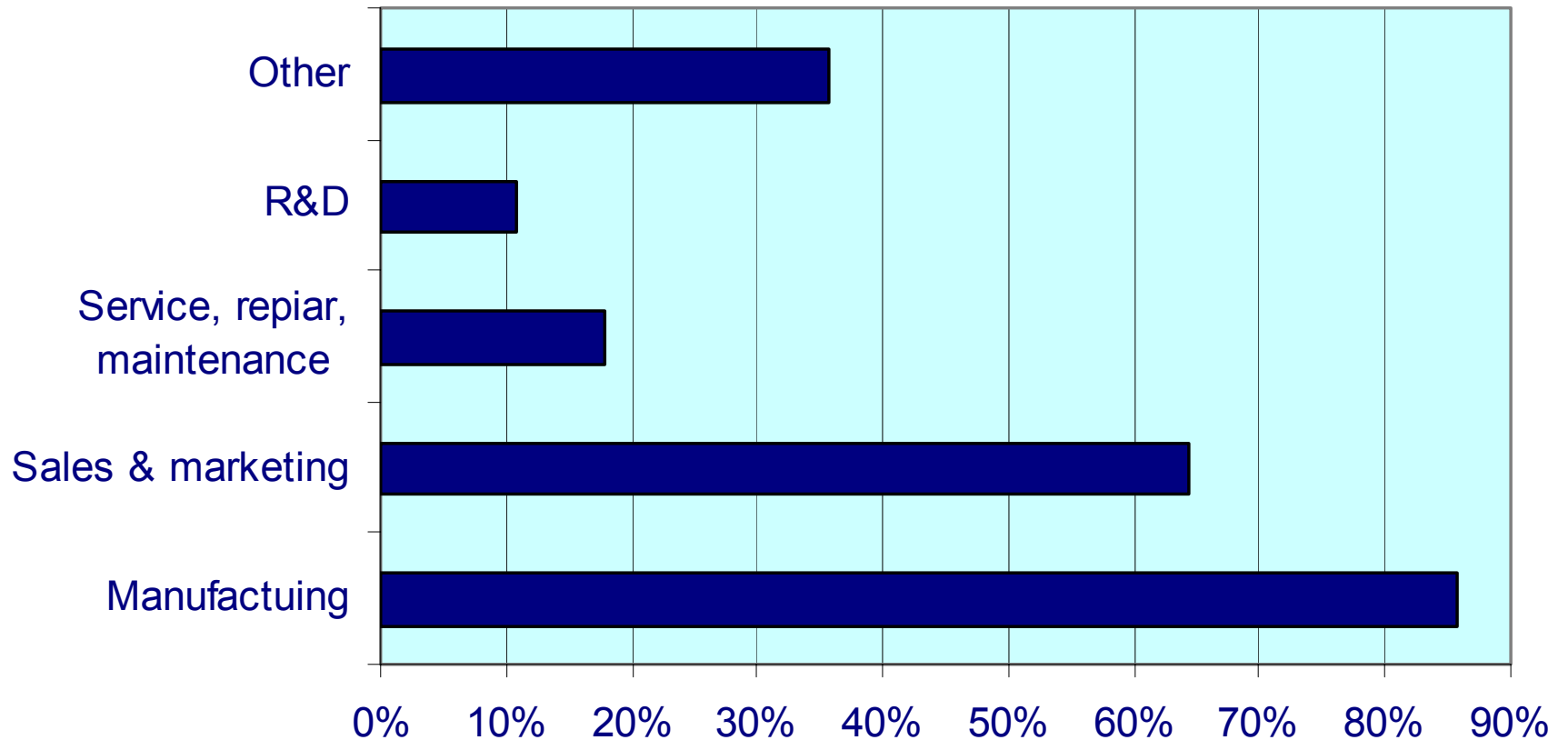
Renewable Energy – FDI Project Projections

Global Renewables FDI Projects Forecast 2006-2011



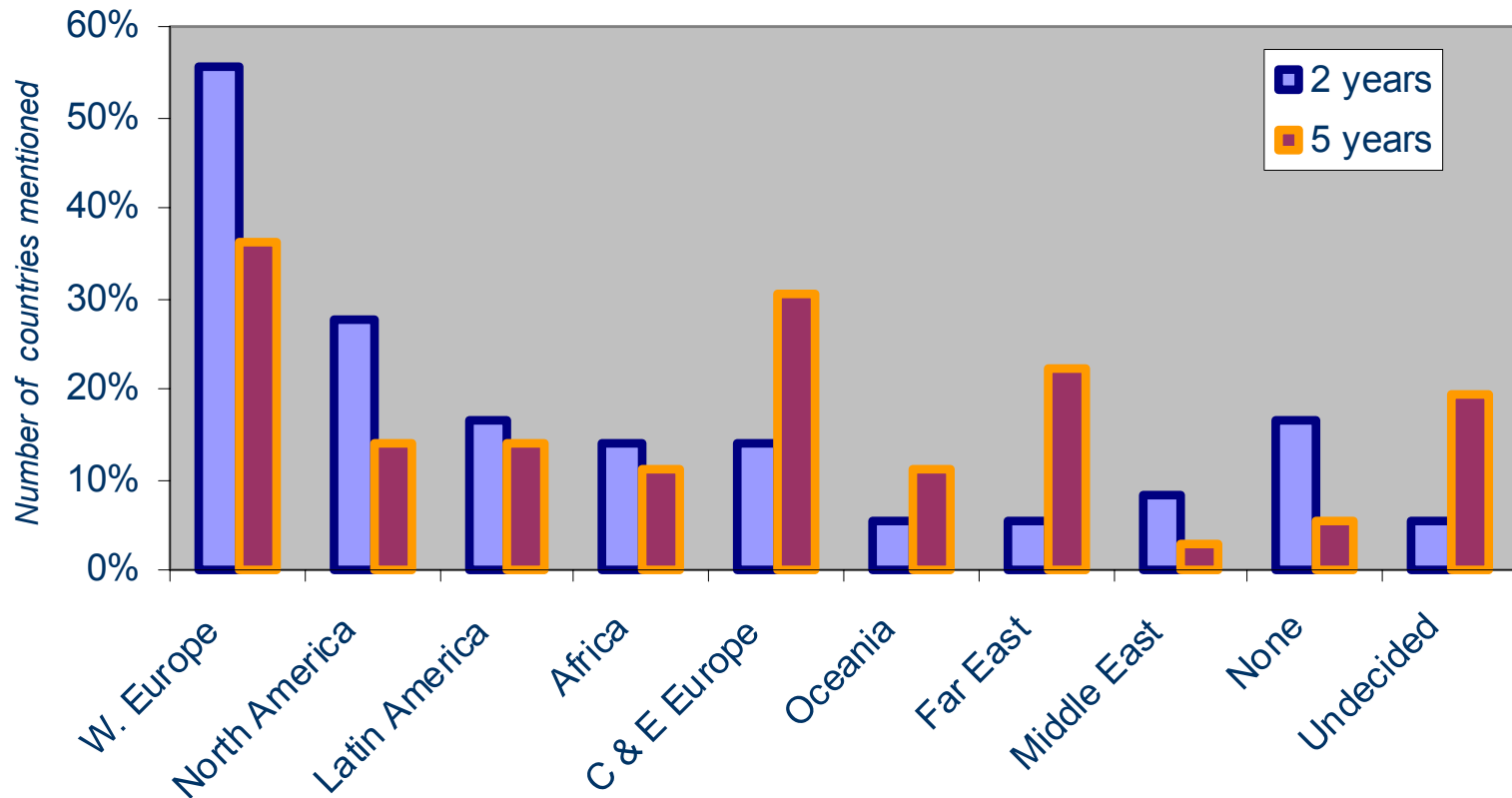
Types of Expansion Plans

Type of Operations Planned Over the Next Two Years



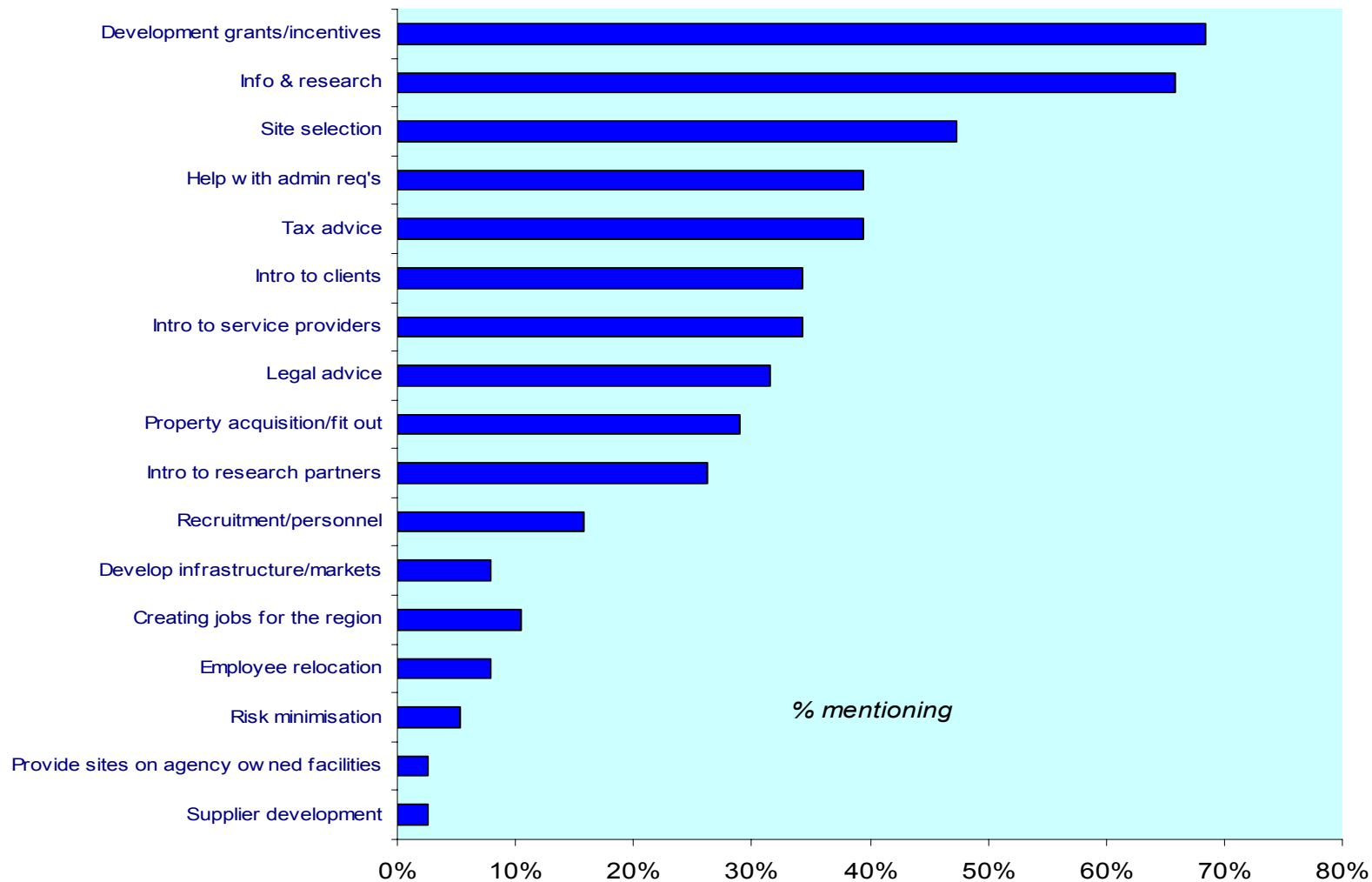
Regional Expansion Focus

Which Countries or Regions Are You Considering Investing in over the next 2-5 years?



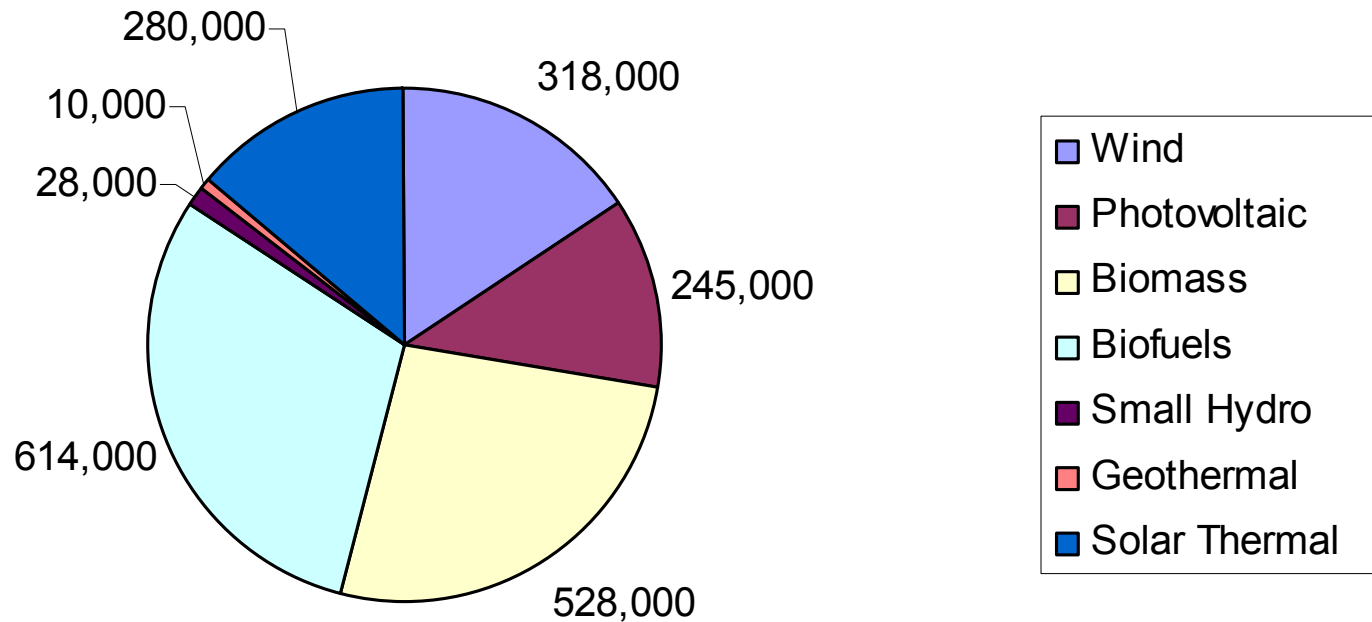
Perceived Role EDAs

Perceived Role of Development Agencies



Summing Up – Jobs?

No. of jobs in Renewable Energy 2020



Source: Oxford Intelligence based on EREC

THANK YOU!



Paul Wright
Director
Oxford Intelligence
Tel: +31 615010498
E: paul.wright@oxint.com
www.oxint.com