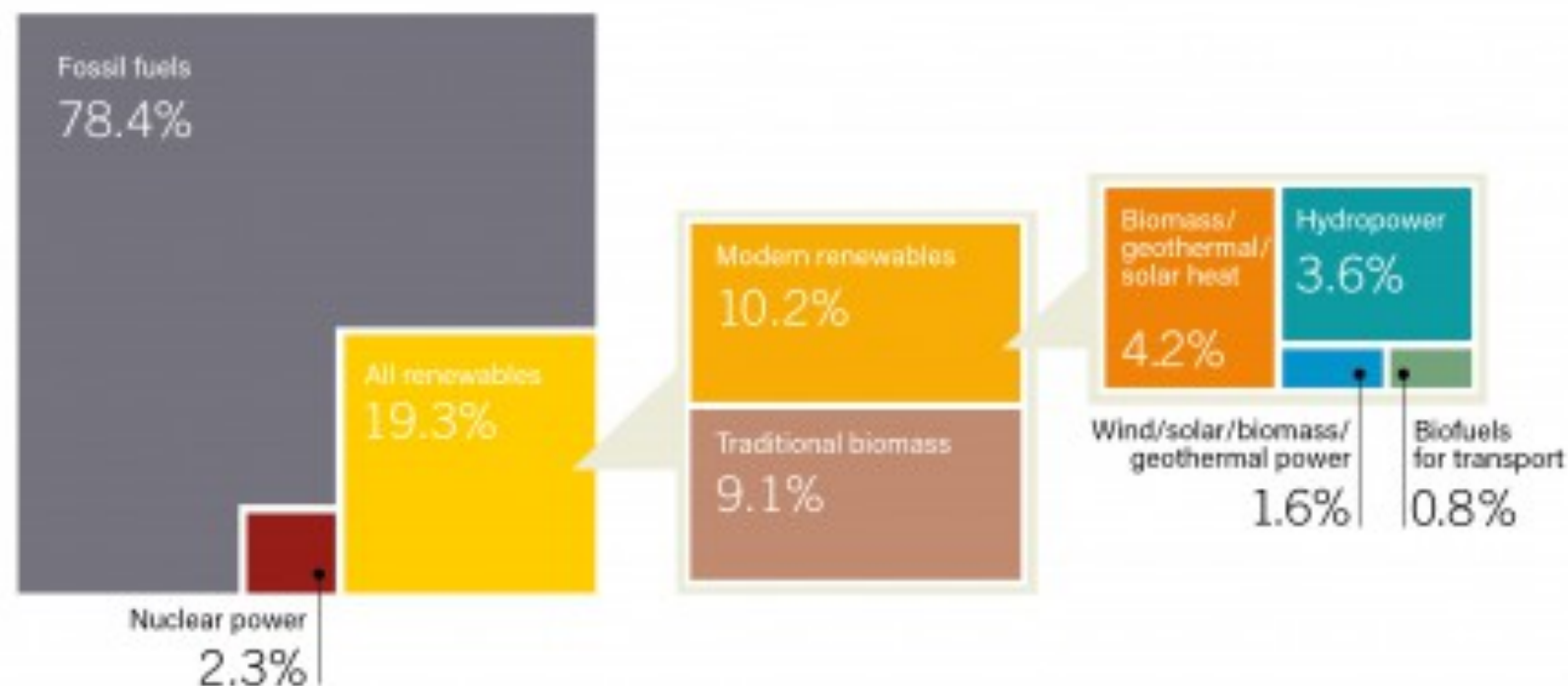


Internationale Erfahrungen in der Förderpolitik

Wien, 14. März 2018

Estimated Renewable Energy Share of Total Final Energy Consumption, 2015



Estimated Renewable Energy Share of Global Electricity Production, End-2016

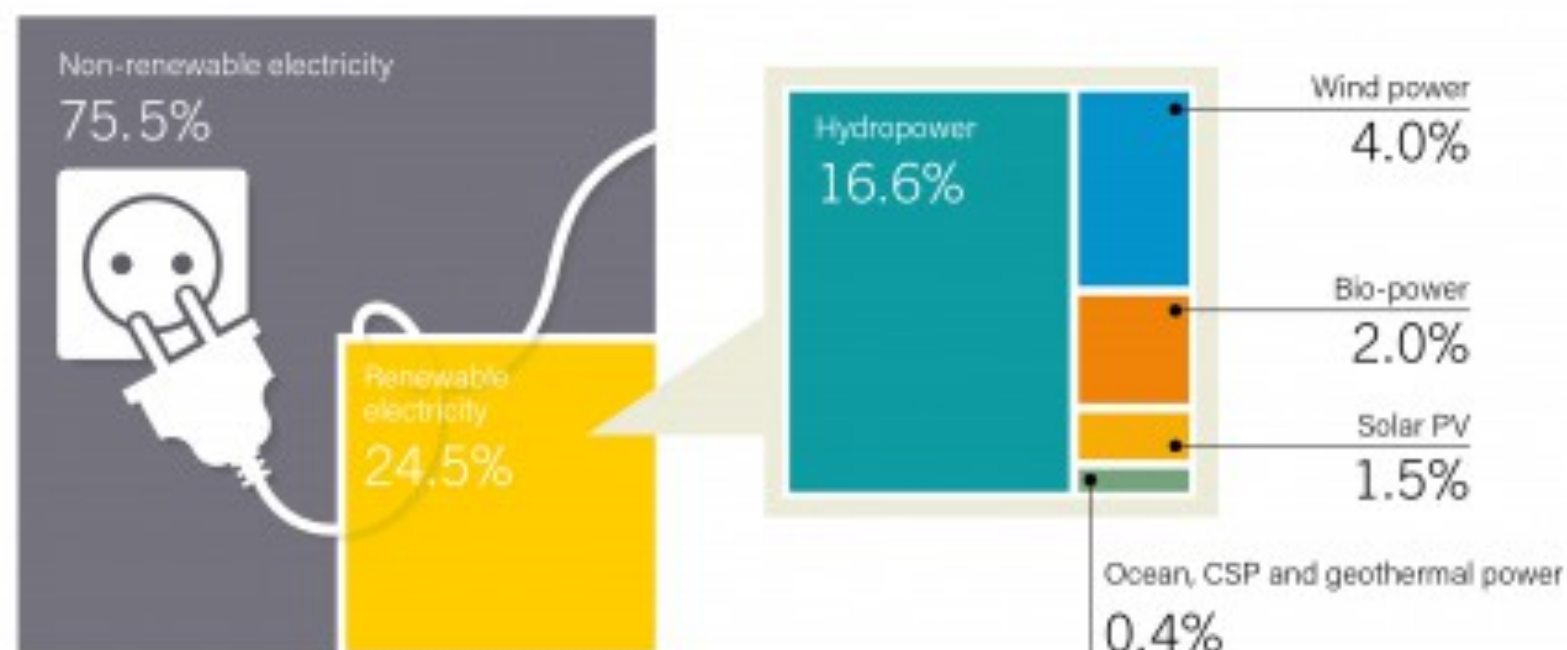
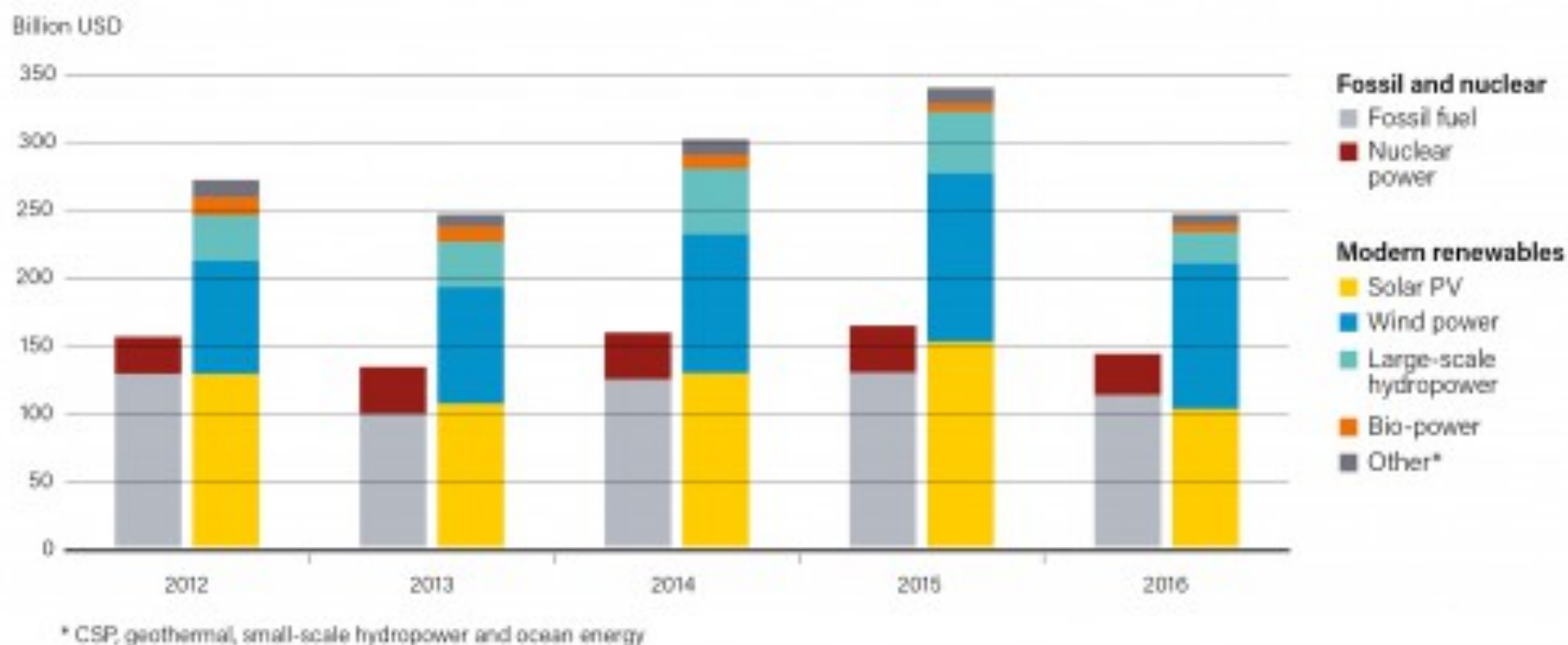


Figure: 44

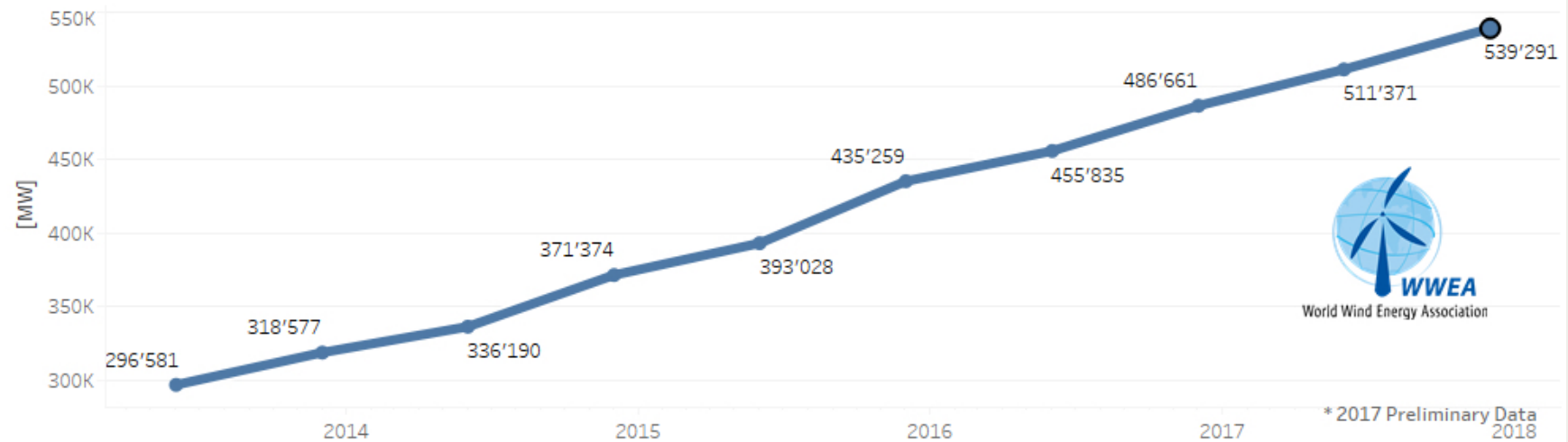
Global Investment in Power Capacity, by Type (Renewable, Fossil Fuel and Nuclear Power), 2012-2016



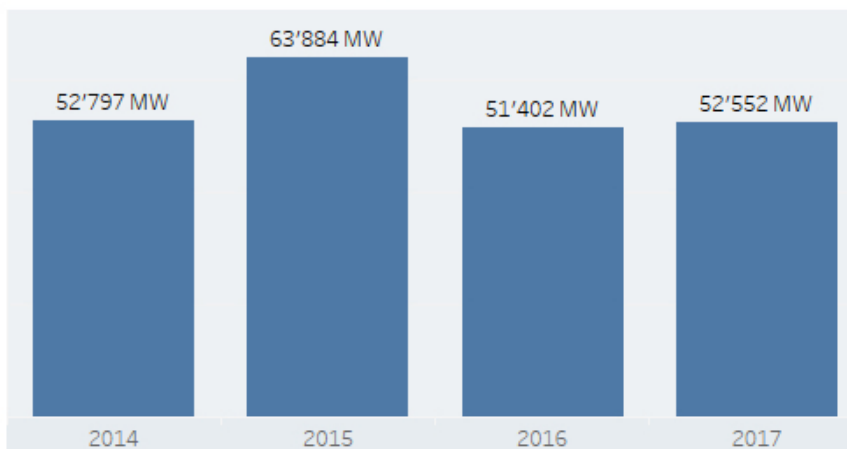
World Wind Market Status



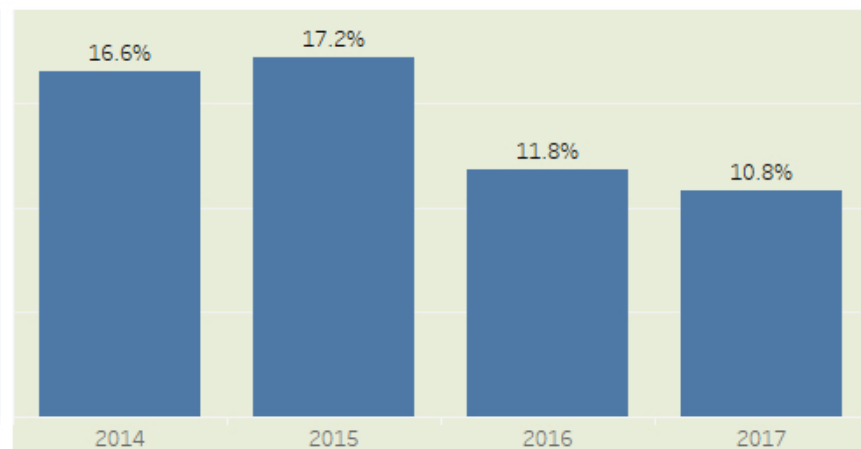
Total Installed Capacity 2013-2017 (preliminary data)



New Installed Capacity



Growth Rates



World Wind Market Status

Top 16 + rest of the World [MW]

Country/Region	Total capacity end 2017	Added capacity 2017	Total capacity end 2016	Total capacity end 2015	Total capacity end 2014	Total capacity end 2013
China*	187730	19000	168730	148000	114763	91413
United States	88927	6894	82033	73867	65754	61108
Germany	56164	6145	50019	45192	40468	34658
Rest of the World*	48500	5600	42822	37522	32219	26493
India**	32879	4600	28279	24759	22465	20150
Spain	23026	6	23020	22987	22987	22959
United Kingdom	17852	3340	14512	13614	12440	10531
France	13760	1695	12065	10293	9296	8254
Brazil	12763	1963	10800	8715	5962	3399
Canada	12239	341	11898	11205	9694	7698
Italy*	9700	443	9257	8958	8663	8551
Turkey*	6981	900	6081	4718	3763	2958
Sweden*	6721	228	6493	6029	5425	4470
Poland*	6534	752	5782	5100	3834	3390
Denmark	5320	93	5227	5064	4883	4772
Portugal*	5316	0	5316	5050	4953	4724
Australia*	4879	553	4326	4186	3806	3049
Gesamtsumme	539291	52552	486661	435259	371374	318577

* Preliminary
estimation

Wind Power Worldwide



Electricity generated:

> 1000 TWh



Share in global electricity demand:

~ 5 %



Countries with high wind shares:



Denmark > 40 %

Spain 21 %

Uruguay 18 %

Germany 13 %

Scotland 41 %

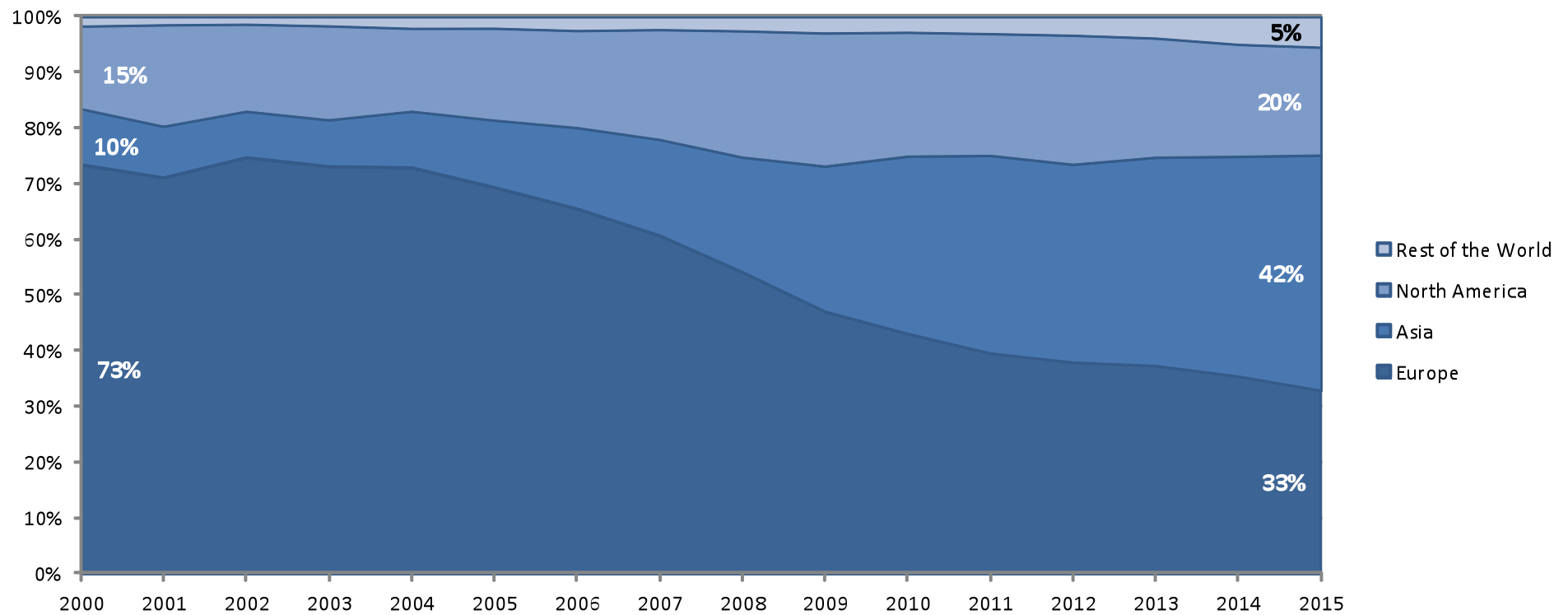
Portugal > 20 %

Ireland 16 %

United Kingdom 11 %

Installed Wind Capacity Worldwide

Global Share of Wind Installed Capacity 2000 - 2015 [MW]

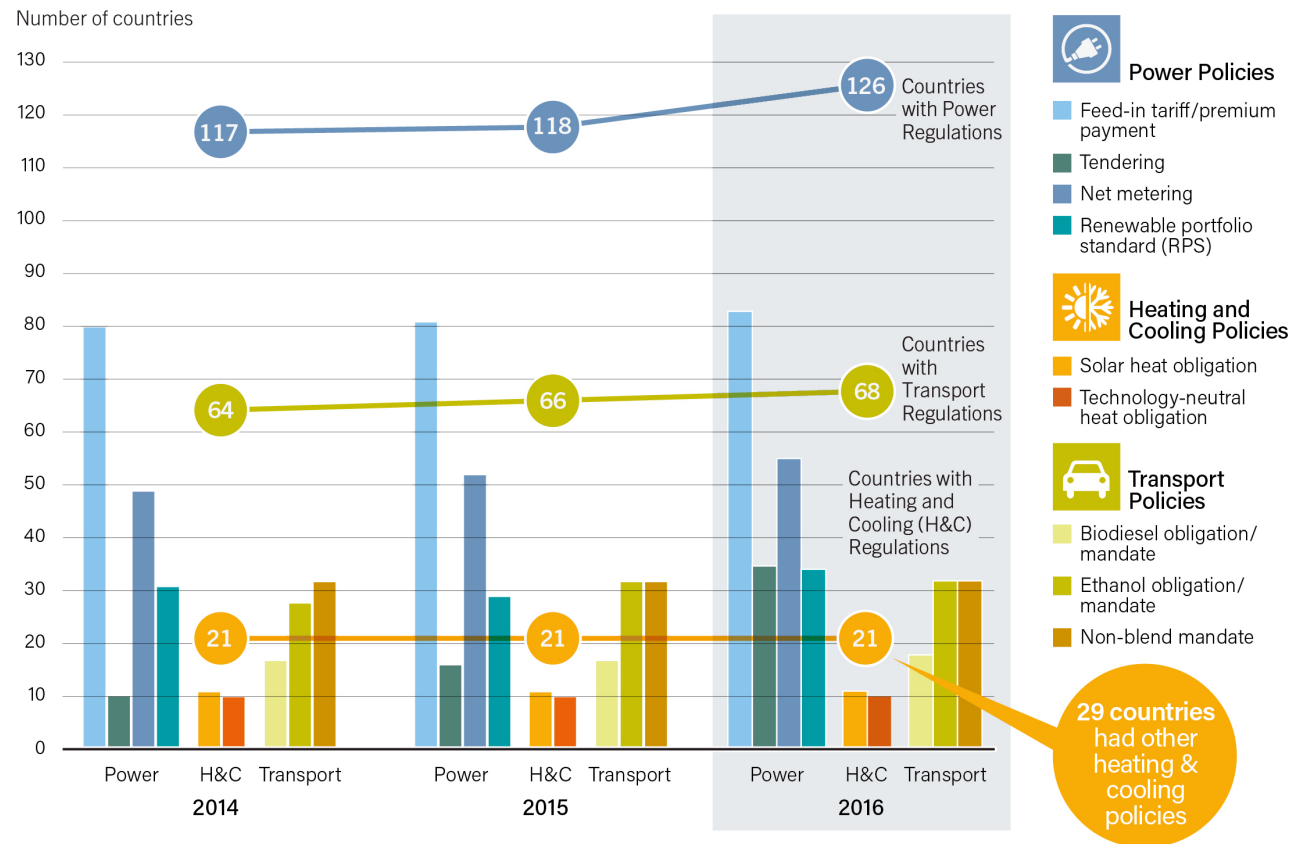


Globale Trends in Windenergie

- Geographische Diversifizierung
- Abnehmende Bedeutung Europas als Leitmarkt
- Neue Märkte in Lateinamerika und Afrika
- Trend hin zu Ausschreibungen –
Einspeisemodelle nach wie vor vorherrschend
- Wichtige Themen:
Technisch-ökonomische Systemintegration
Sozioökonomische Partizipation

Figure: 45

Number of Renewable Energy Regulatory Incentives and Mandates, by Type, 2014-2016



Note: Figure does not show all policy types in use. In many cases countries have enacted additional fiscal incentives or public finance mechanisms to support renewable energy. Heating and cooling policies do not include renewable heat FITs (i.e., in the United Kingdom). Countries are considered to have policies when at least one national or state/provincial-level policy is in place. A country is counted a single time if it has one or more national and/or state/provincial-level policies. Some transport policies include both biodiesel and ethanol; in this case, the policy is counted once in each category (biodiesel and ethanol). Tendering policies are presented in a given year if a jurisdiction has held at least one tender during that year.

REN21 *Renewables 2017 Global Status Report*

FITs have created wind markets and industries

Top 16 + rest of the World [MW]

Country/Region	Total capacity end 2017	Added capacity 2017	Total capacity end 2016	Total capacity end 2015	Total capacity end 2014	Total capacity end 2013
★ China*	187730	19000	168730	148000	114763	91413
★ United States	88927	6894	82033	73867	65754	61108
★ Germany	56164	6145	50019	45192	40468	34658
Rest of the World*	48500	5600	42822	37522	32219	26493
India**	32879	4600	28279	24759	22465	20150
★ Spain	23026	6	23020	22987	22987	22959
United Kingdom	17852	3340	14512	13614	12440	10531
★ France	13760	1695	12065	10293	9296	8254
Brazil	12763	1963	10800	8715	5962	3399
★ Canada	12239	341	11898	11205	9694	7698
★ Italy*	9700	443	9257	8958	8663	8551
★ Turkey*	6981	900	6081	4718	3763	2958
Sweden*	6721	228	6493	6029	5425	4470
★ Poland*	6534	752	5782	5100	3834	3390
Denmark	5320	93	5227	5064	4883	4772
★ Portugal*	5316	0	5316	5050	4953	4724
Australia*	4879	553	4326	4186	3806	3049
Gesamtsumme	539291	52552	486661	435259	371374	318577

* Preliminary
estimation

Akteursvielfalt als Stärke der Erneuerbaren Energien



wichtige Rolle für KMUs und Bürgerenergie



WWEA-Studie: Ausschreibungen in Deutschland

- Faktisch kaum oder keine Einsparung im Vergleich zu FIT
- > 95% der Projekte mit „Bürgerenergie“-Privilegien:
höherer Zuschlagspreis, keine BImSchG-Genehmigung nötig, längere Realisierungsfristen, geringere Sicherheitsleistung
- Kaum echte Bürgerenergie, da unzureichende Definition
- Wettbewerbsverzerrung zugunsten von wenigen großen Projektentwicklern, die „Bürgerenergie“-Privileg ausnutzten
- Allgemeiner Markteinbruch für 2019 erwartet

Kommanditist(en):

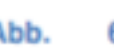
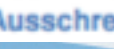
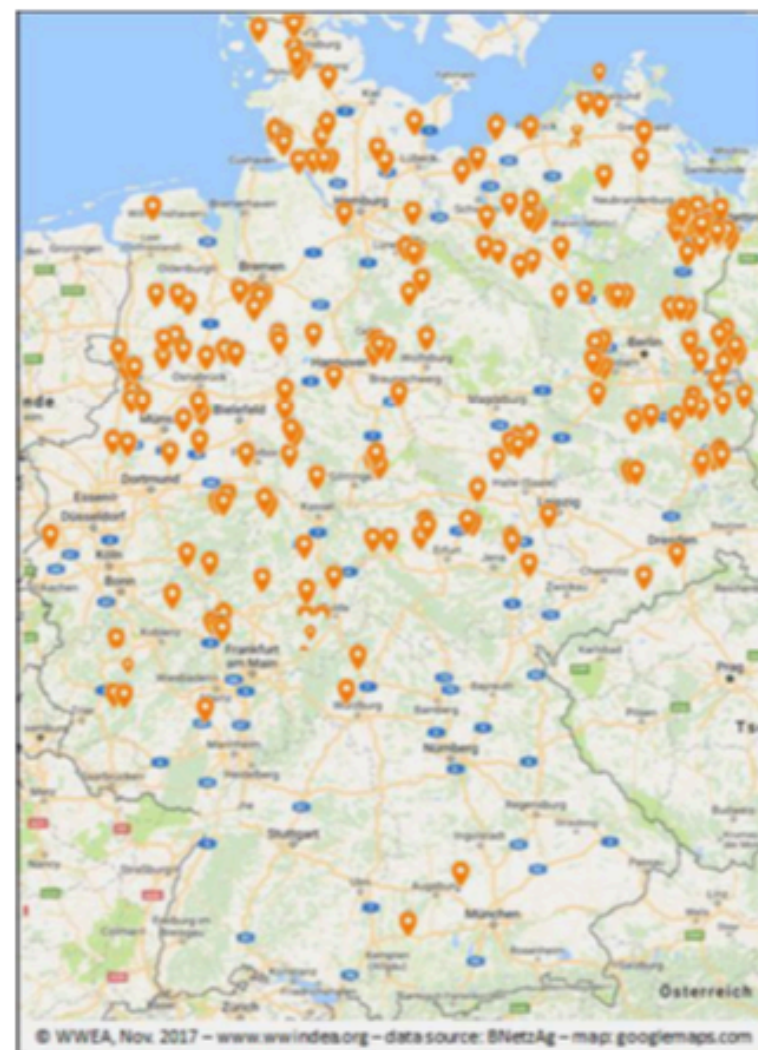
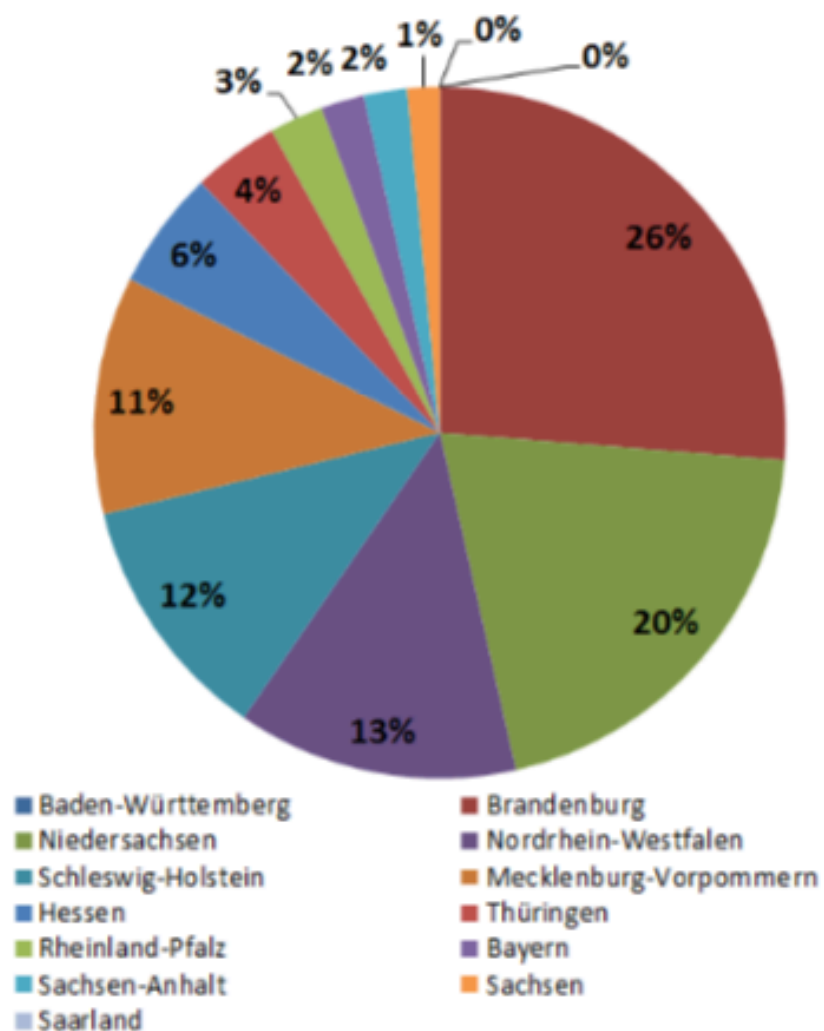
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR
	Einlage: 100,00 EUR

Abb. 6: Handelsregister-Auszug einer in den Ausschreibungen erfolgreichen Bürgerenergiegesellschaft

WWEA-Studie: Ausschreibungen in Deutschland



WWEA-Studie: Bürgerwind in Deutschland unter Ausschreibungen existenziell bedroht

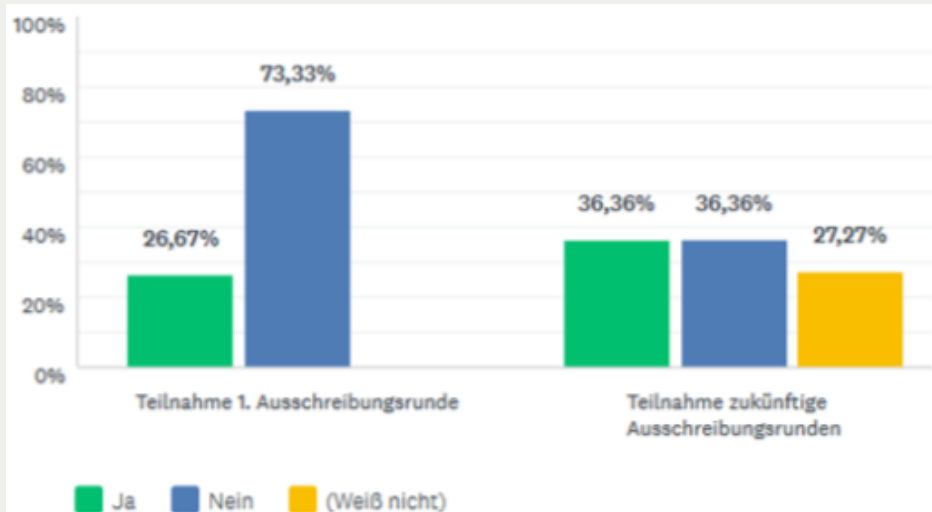


Abb. 14: Teilnahme an der ersten Ausschreibungsrunde (Onshore-Wind)

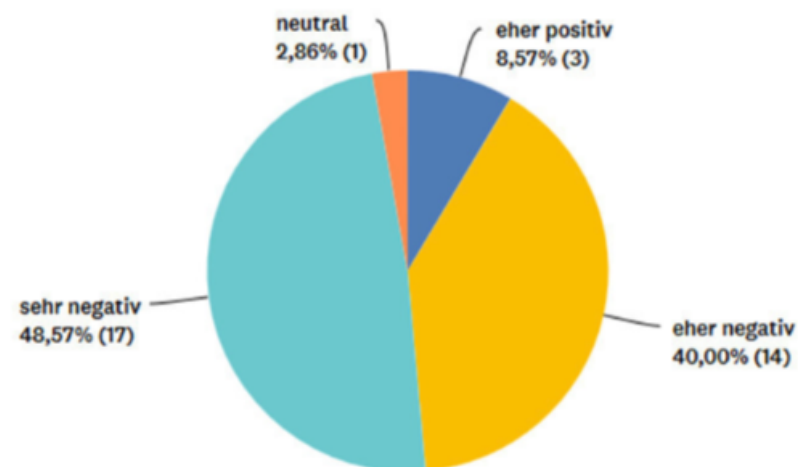


Abb. 21: Bewertung der Umstellung auf Ausschreibungen (In 2017)

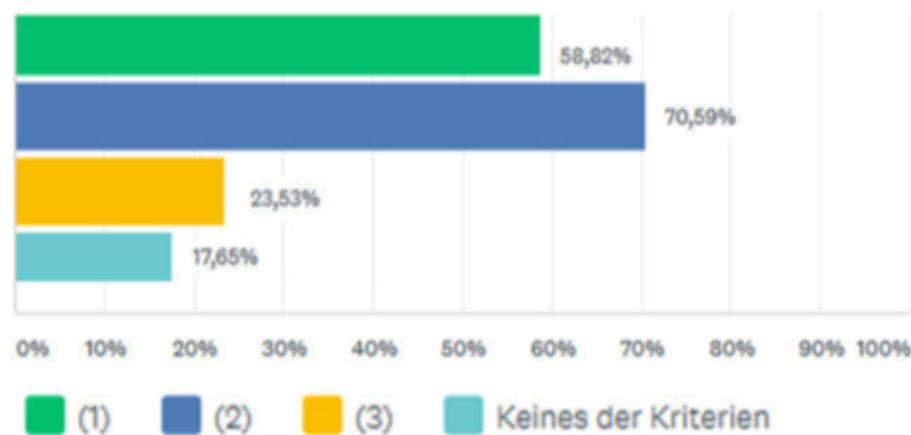
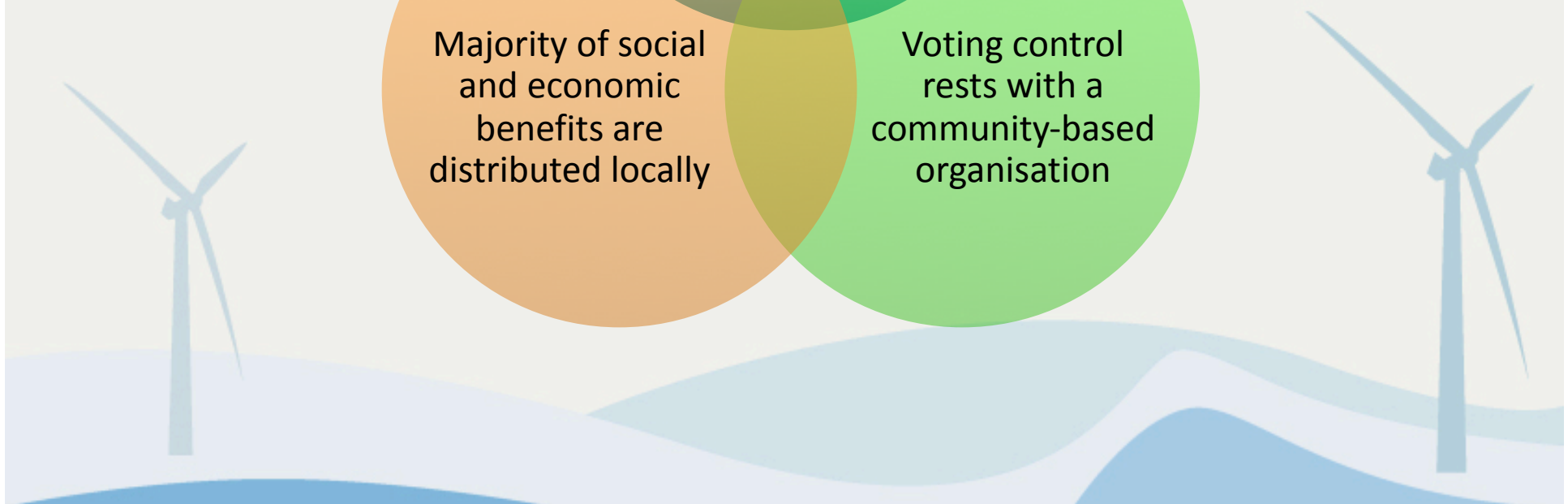
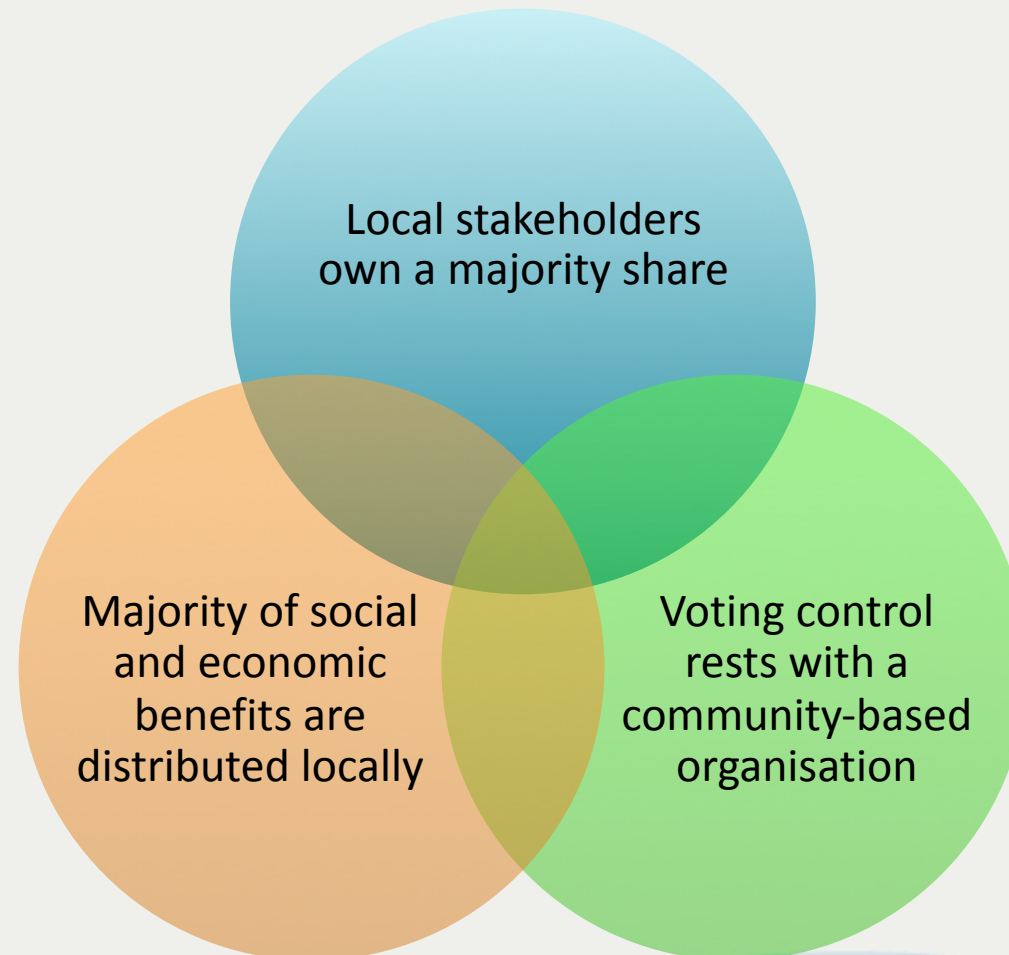


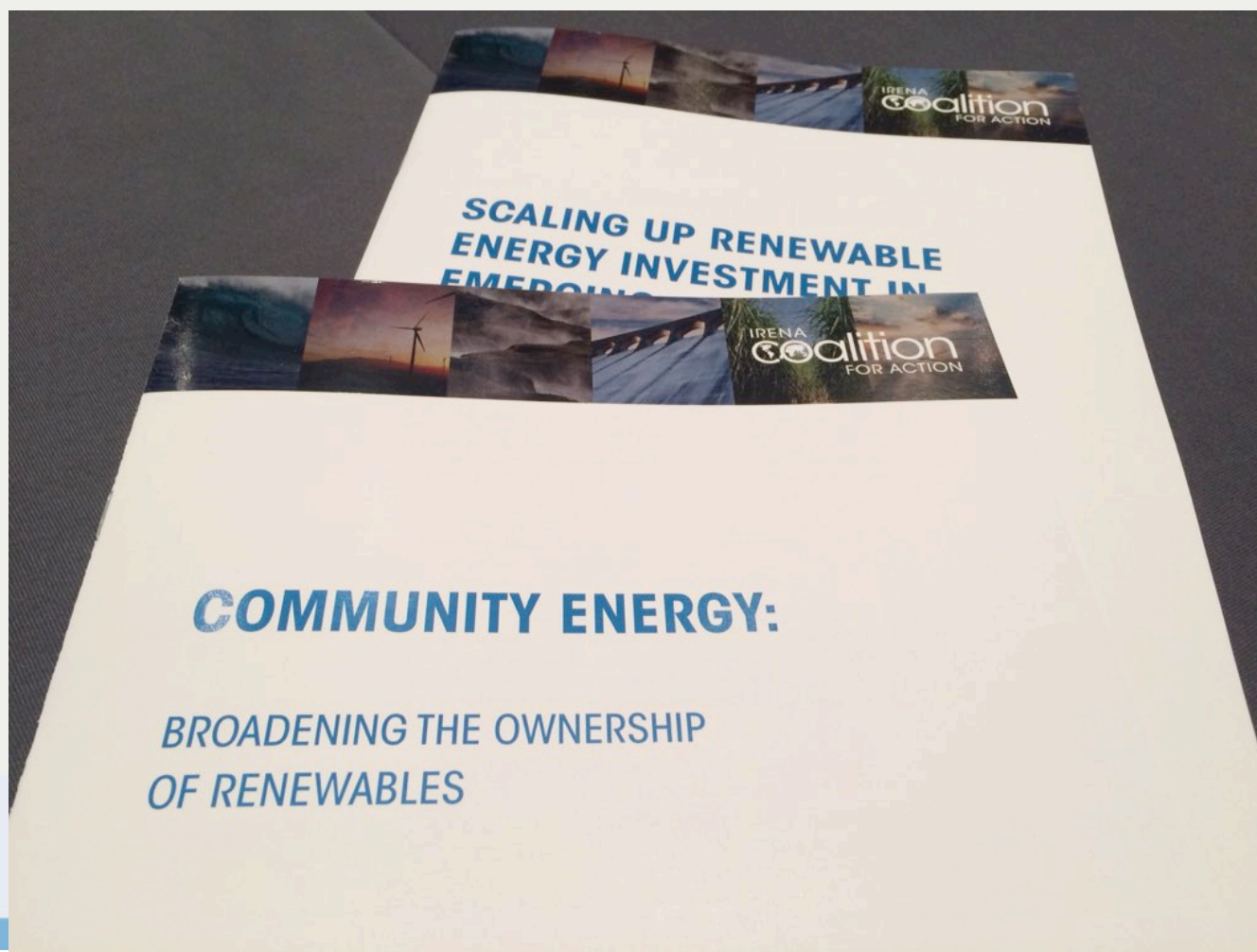
Abb. 20: Überprüfung der Bestandsprojekte der Umfrageteilnehmer auf die Kriterien der Bürgerenergie definition im EEG 2017

Echte Bürgerenergie ist wichtige Triebkraft



Bürgerenergie international

IRENA Coalition for Action „Community Energy“-Untergruppe
der Business & Investors Group



Vielen Dank für Ihre Aufmerksamkeit!

www.WWindEA.org

