



ACERA

Asociación Chilena de Energías Renovables y Almacenamiento AG.

POR UN CHILE
100% RENEVABLE

Renewable Energies in the Americas Charging Ahead

Wilson Center Webinar

June 23rd 2020



MEMBERS OF ACERA

Chilean Association of Renewable Energies and Storage



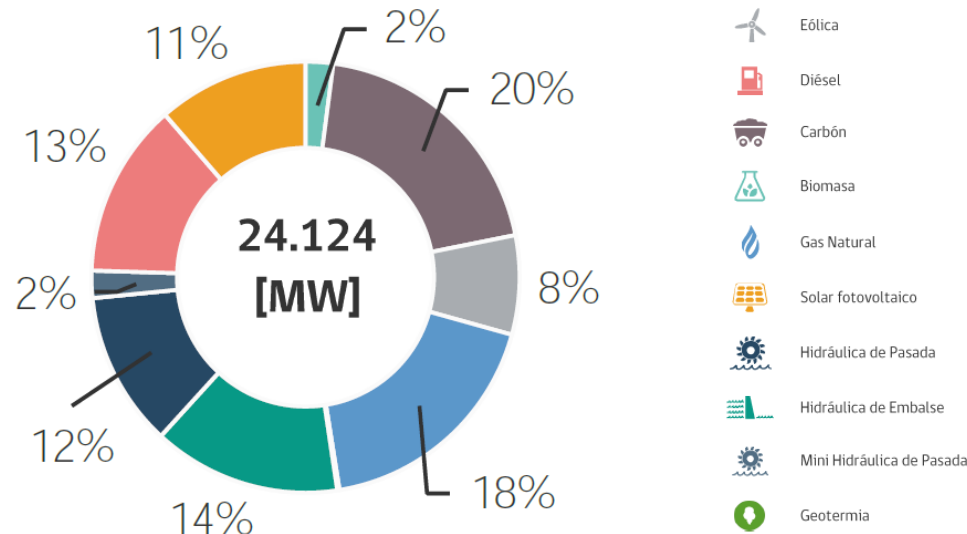
YEARLY GROSS GENERATION BY SOURCE

Chile

| | (TWh) | | var% |
|----------------|--------------|--------------|---------------|
| | 2019 | 2018 | |
| Storage | 0,01 | 0,01 | 39,6% |
| Wind | 4,82 | 4,07 | 18,2% |
| Geothermy | 0,2 | 0,21 | -5,7% |
| Hydro | 20,81 | 23,26 | -10,5% |
| Solar | 6,37 | 5,47 | 16,5% |
| Thermoelectric | 45,16 | 43,87 | 2,9% |
| Total | 77,37 | 76,9 | 0,6% |

In terms of total electricity generation, Chile is comparable to the state of Kentucky

- Thermoelectric include biogas and biomass based generation
- Hydro include large and small power plants



- Eólica
- Diésel
- Carbón
- Biomasa
- Gas Natural
- Solar fotovoltaico
- Hidráulica de Pasada
- Hidráulica de Embalse
- Mini Hidráulica de Pasada
- Geoterminia

STATUS OF NON CONVENTIONAL RENEWABLE ENERGIES



Chile

| Technology | Installed Capacity [MW] | Commissioning [MW] | Construction [MW] | RCA Approved (1) [MW] | Under environmental qualification [MW] |
|----------------|-------------------------|--------------------|-------------------|-----------------------|--|
| Biomass | 501 | 9 | 171 | 1.076 | 12 |
| Wind | 1.798 | 345 | 1.711 | 10.730 | 3.343 |
| Geothermy | 40 | - | 33 | 170 | - |
| Mini Hydro (2) | 516 | 39 | 102 | 779 | 8 |
| Solar-PV | 2.720 | 226 | 3.068 | 18.859 | 11.678 |
| Solar-CSP | - | 100 | - | 2.032 | - |
| Total | 5.575 | 719 | 5.085 | 33.646 | 15.041 |

As of May, 2020

CHILE

Main drivers for RE development



- Open economy.
- De-risking for solar and wind generators.
- Growing demand.
- Demonstration effect of public tenders for distribution companies.
- “It’s nice to be green when prices are low”.
- Retirement of coal-based generation

IMPACT OF COVID-19

- Decrease of power demand (10% so far).
- Delay of tenders, public and private.
- Delay of investments.
- The false dilemma: economic recovery or sustainability.
- Increased competition from fossil fuels.

REGULATORY AND MARKET LANDSCAPE

Down sides

- Price stabilization fund for end customers (financed by generators that supply energy to distributors), will be fully used by Q1 2021 (US\$ 1,350 million).
- Conflicts arise about who should support the financing of the postponement of payment of electric energy bills during the COVID19 crisis.
- Transmission capacity is a growing barrier for new RE power plants.
- When will the decree that modifies the Stabilized Price for small RE generators be in effect.

REGULATORY AND MARKET LANDSCAPE

Up sides

- The Climate Change framework law is being discussed at the Congress. Sets the goal of zero net emissions by 2050.
- The voluntary agreement between Government and generators for the early retirement of coal-fired plants continues and may even get faster.
- Power system flexibility regulations are expected to be discussed and published this year.
- Opportunities for energy storage are appearing.
- A market for ancillary services is working.

Toward a Sustainable Recovery

May 22, 2020 | LAURENCE TUBIANA, EMMANUEL GUERIN

The conventional narrative about the course of the COVID-19 crisis is easy to understand, but ultimately incorrect. Rather than a cleanly schematic multi-phase process of emergency response and recovery, the crisis demands a comprehensive approach in which short- and long-term goals are aligned from the beginning.

PARIS – With countries in most of Europe progressively easing their COVID-19 lockdowns, it is time not only to chart a course out of the immediate crisis, but also to hold a much-needed debate about designing and funding a long-term plan for sustainable recovery.



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¡Gracias!



Carlos Finat D.

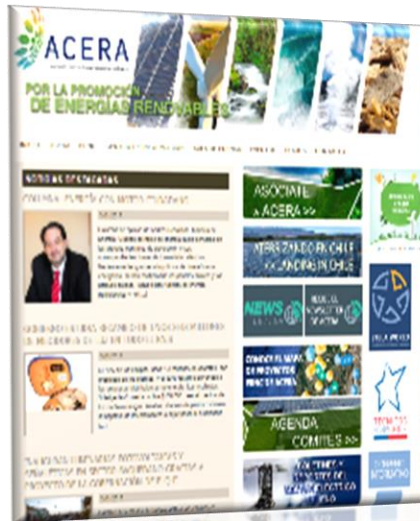
Director Ejecutivo ACERA

- Ingeniero Civil Electricista
- Director de Operación y Peajes del CDEC-SING – 1999 – 2008
- Gerente de Energía – Minera Collahuasi – 2008 – 2012
- Representante de clientes libres en el Directorio del CDEC-SING – 2010 – 2012
- Presidente del CDEC-SING – 2011-2012
- Director Ejecutivo de ACERA desde Octubre de 2012

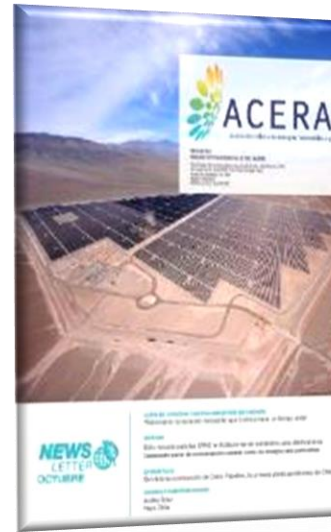


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