

Renewables 2005 Global Status Report
2005 世界可再生能源报告

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Report Outline

内容提要

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农村（离网）可再生能源

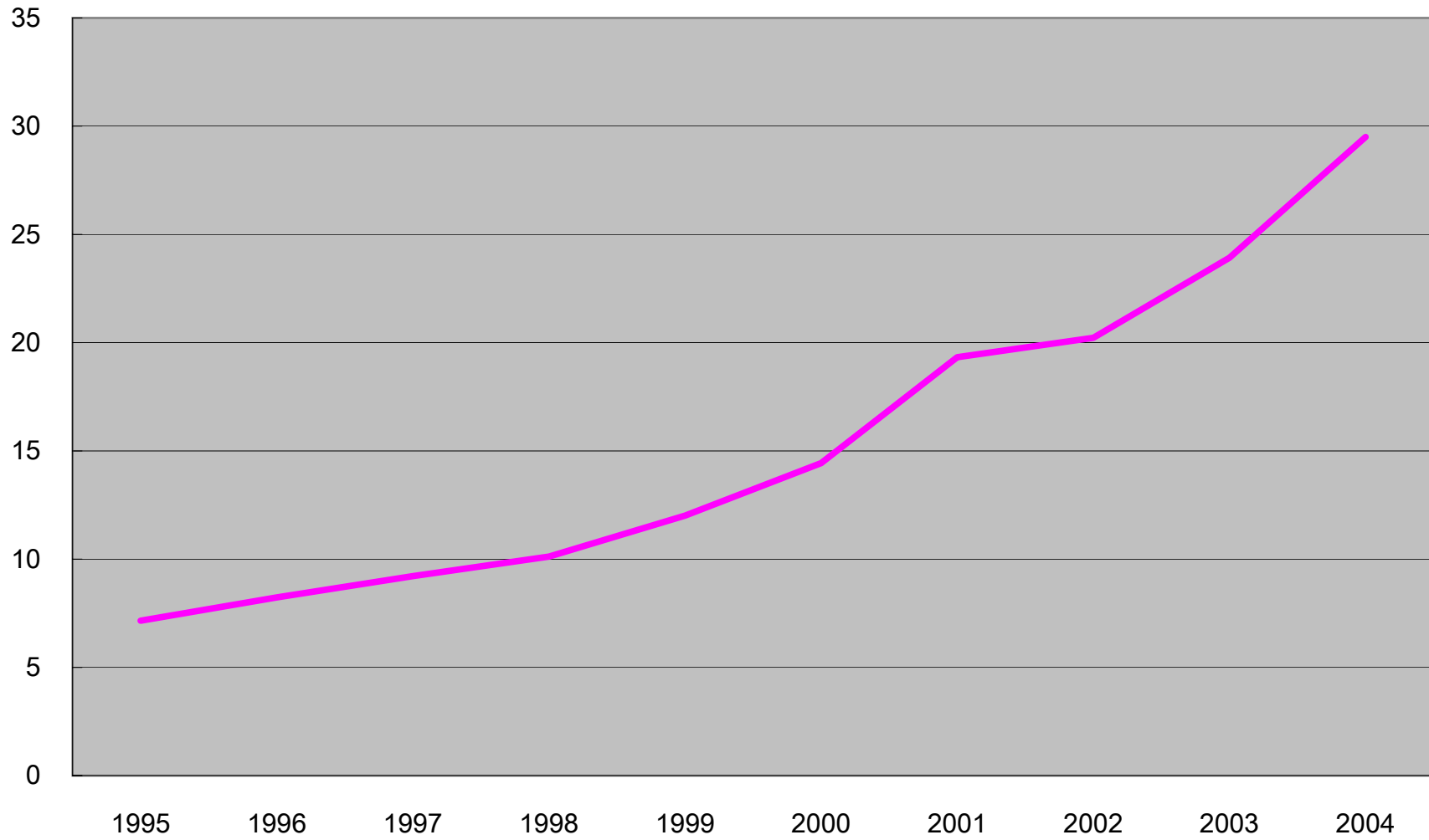
Report Development

《报告》进展

- Report designed to compile existing factual information about markets, investments, and policies. No analysis, recommendations, or conclusions.
《报告》编写准则为汇总关于市场、投资 and 政策的已有实际数据。不加分析、评论或推论。
- Report based on research, data, interviews, and review by over 100 contributors from around the world, from February to September 2005.
《报告》基于世界各地 100 多名合作者于 2005 年 2 月至 9 月的研究，数据，采访和综述
- Sponsored by the REN21 Renewable Energy Policy Network and German government. Eric Martinot is Lead Author and Research Director. Worldwatch Institute and GTZ are producer and publisher.
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图10：1995-2004年可再生能源年投资量（10亿美元）

Figure 10: Annual Investment in Renewable Energy, 1995-2004 (billion dollars)



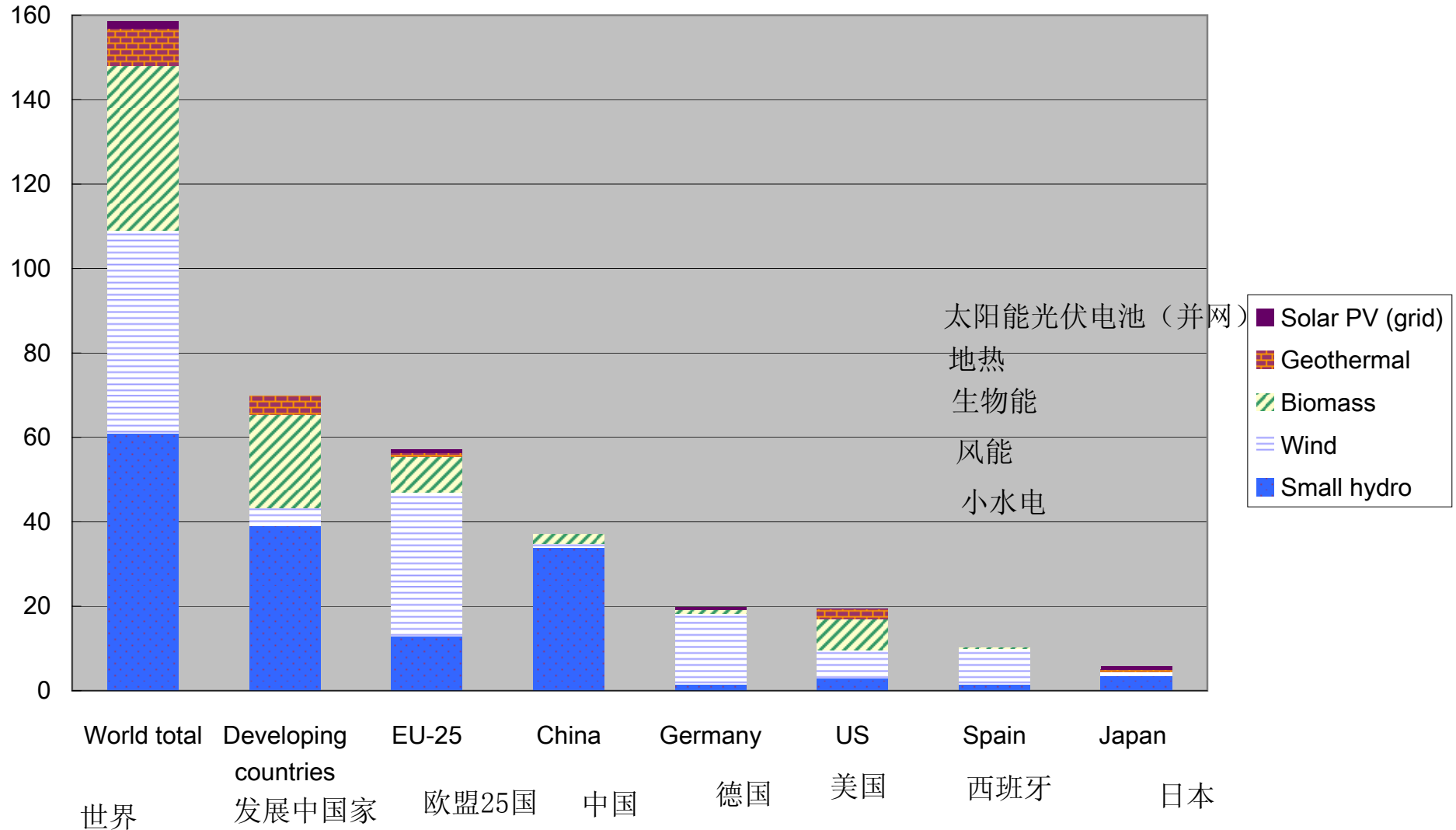
Global Market Overview – Power Generation

全球市场概览-- 发电

- Renewable power capacity totals 160 GW worldwide (excluding large hydropower). This is 4% of total global power capacity.
世界可再生能源总装机容量为 160GW（不含大水电）,占全球总装机容量的 4%。
- Developing countries account for 44%, with 70 GW.
发展中国家占 44%，为 70GW。
- China has the largest installed capacity of any single country, with 37 GW, followed by Germany, the United States, Spain, and Japan.
中国在所有国家中装机容量最大，为 37GW，其次是德国，美国，西班牙，日本。

图5：2004年可再生能源容量（GW），发展中国家，欧盟和前5名国家（不含大水电）

Figure 5: Renewable Power Capacities in 2004 (GW) for Developing Countries, EU, and Top Five Individual Countries (excluding large hydropower)



Renewable Electric Power Capacity, GW existing as of 2004

Technology	World Total	Developing Countries	EU-25	China	Germany	U.S.	Spain	Japan
Small hydropower	61	39	13	34	1.6	3.0	1.6	3.5
Wind power	48	4.3	34.2	0.8	16.6	6.7	8.3	0.9
Biomass power	39	22	8	2.3	0.9	7.2	0.3	> 0.1
Geothermal power	8.9	4.5	0.8	< 0.1	0	2.5	0	0.5
Solar PV-grid	1.8	0	0.9	0	0.7	0.1	0	0.8
Solar thermal pwer	0.4	0	0	0	0	0.4	0	0
Ocean (tidal) power	0.3	0	0.3	0	0	0	0	0
Total renewable power capacity (excl. large hydro)	160	70	57	37	20	20	10	6
<i>For comparison:</i>								
Large hydropower	740	330	90	70	n/a	90	n/a	45
Total electric power capacity	3,800	1,400	580	440	n/a	860	n/a	260

2004年新型可再生能源发电容量（GW）

技术类型	世界总量	发展中国家	欧盟25国	中国	德国	美国	西班牙	日本
小水电	61	39	13	34	1.6	3.0	1.6	3.5
风能	48	4.3	34.2	0.8	16.6	6.7	8.3	0.9
生物质能	39	22	8	2.3	0.9	7.2	0.3	>0.1
地热能	8.9	4.5	0.8	<0.1	0	2.5	0	0.5
太阳能光伏发电（并网）	1.8	0	0.9	0	0.7	0.1	0	0.8
太阳能热利用	0.4	0	0	0	0	0.4	0	0
海洋能（潮能）	0.3	0	0.3	0	0	0	0	0
可再生能源发电总装机容量（不包括大水电）	160	70	57	37	20	20	10	6
与下面的数据比较								
大水电	740	330	90	70	n/a	90	n/a	45
全国总电力装机容量	3,800	1,400	580	440	n/a	860	n/a	260

Global Market Overview – Power Generation

全球市场概览-- 发电

- The fastest growing energy technology in the world is grid-connected solar photovoltaic (PV), growing by 60% per year from 2000–2004. Most of this covers rooftops in Japan (200,000), Germany (150,000), and the US (20,000).
世界上目前增长最快的技术为并网太阳能光伏电池（PV），2000-2004 期间年增长率为 60%。主要应用于日本（20 万），德国（15 万）和美国（2 万）的房屋屋顶。
- Second is wind power, which grew by 28% per year, led by Germany, with almost 17 GW installed as of 2004.
其次是风电，年增长率为 28%，2004 年德国以近 17GW 的装机量排在首位。

图3：世界太阳能光伏电池容量，1990-2004（MW）

Figure 3: Solar PV, Existing World Capacity, 1990-2004 (MW)

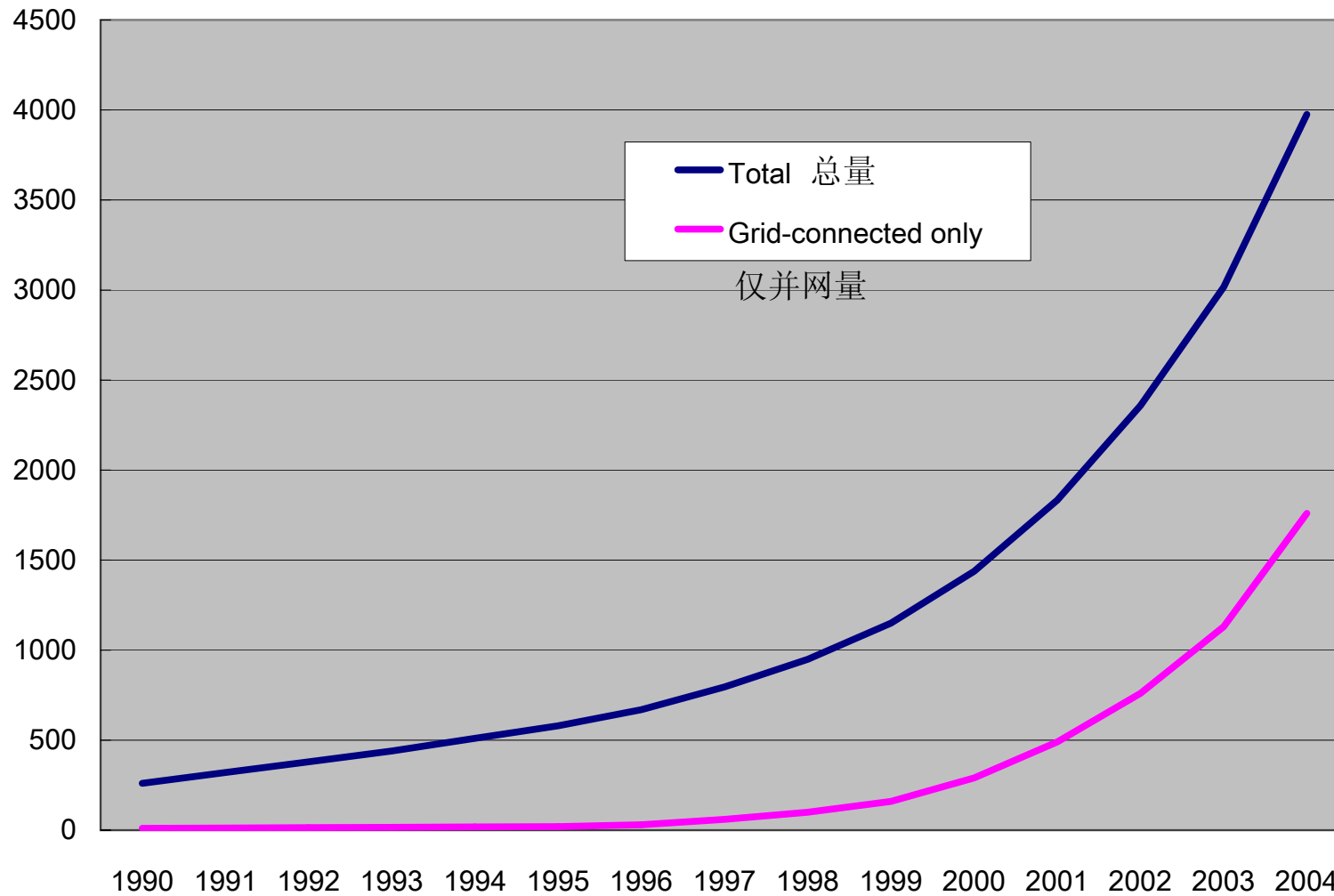


图4：世界风能容量，1990-2004（GW）

Figure 4: Windpower Existing World Capacity, 1990-2004 (GW)

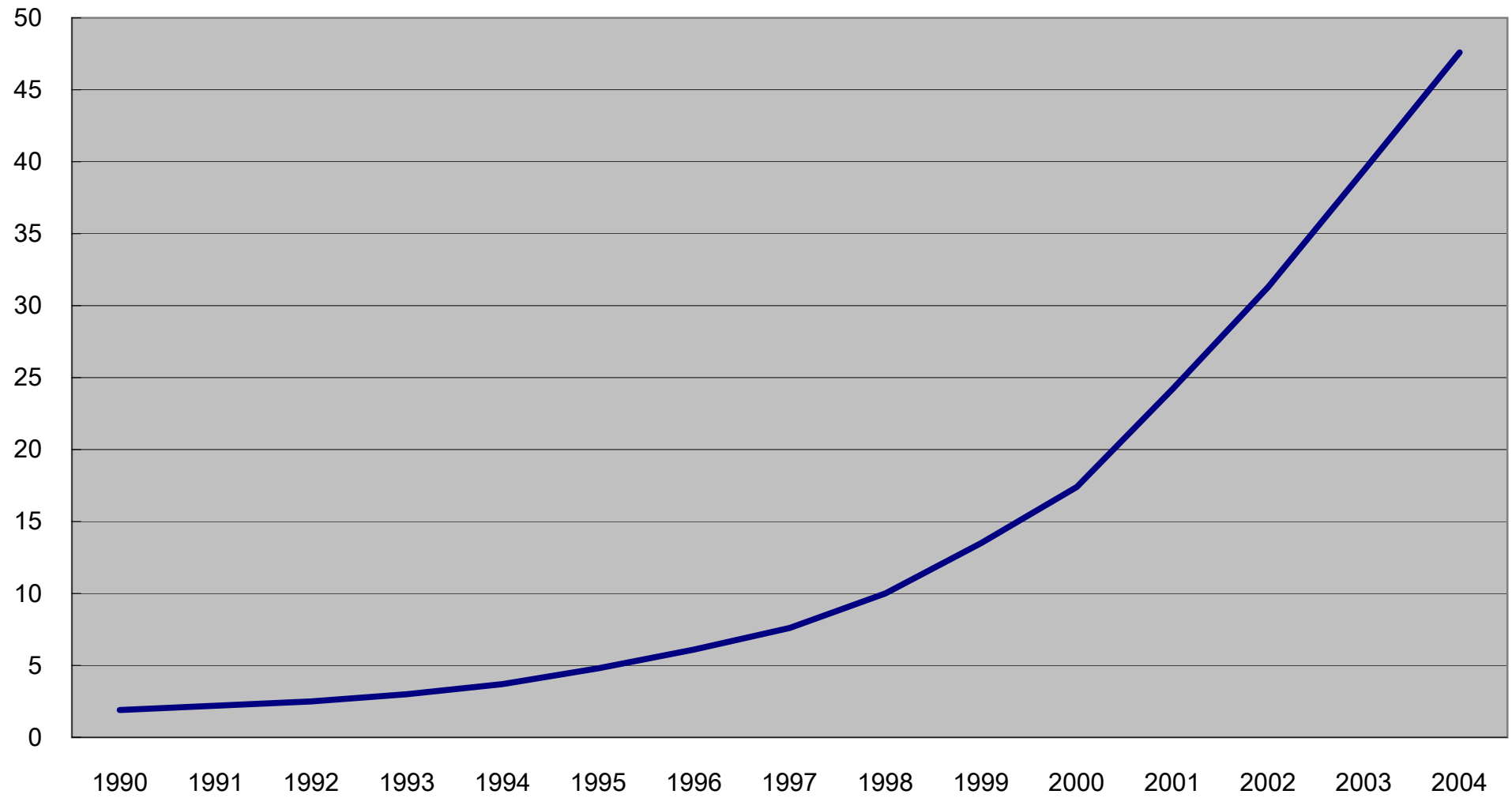


图6：2004年风能容量前10名国家（MW）

Figure 6: Wind Power Capacity, Top 10 Countries, 2004 (MW)

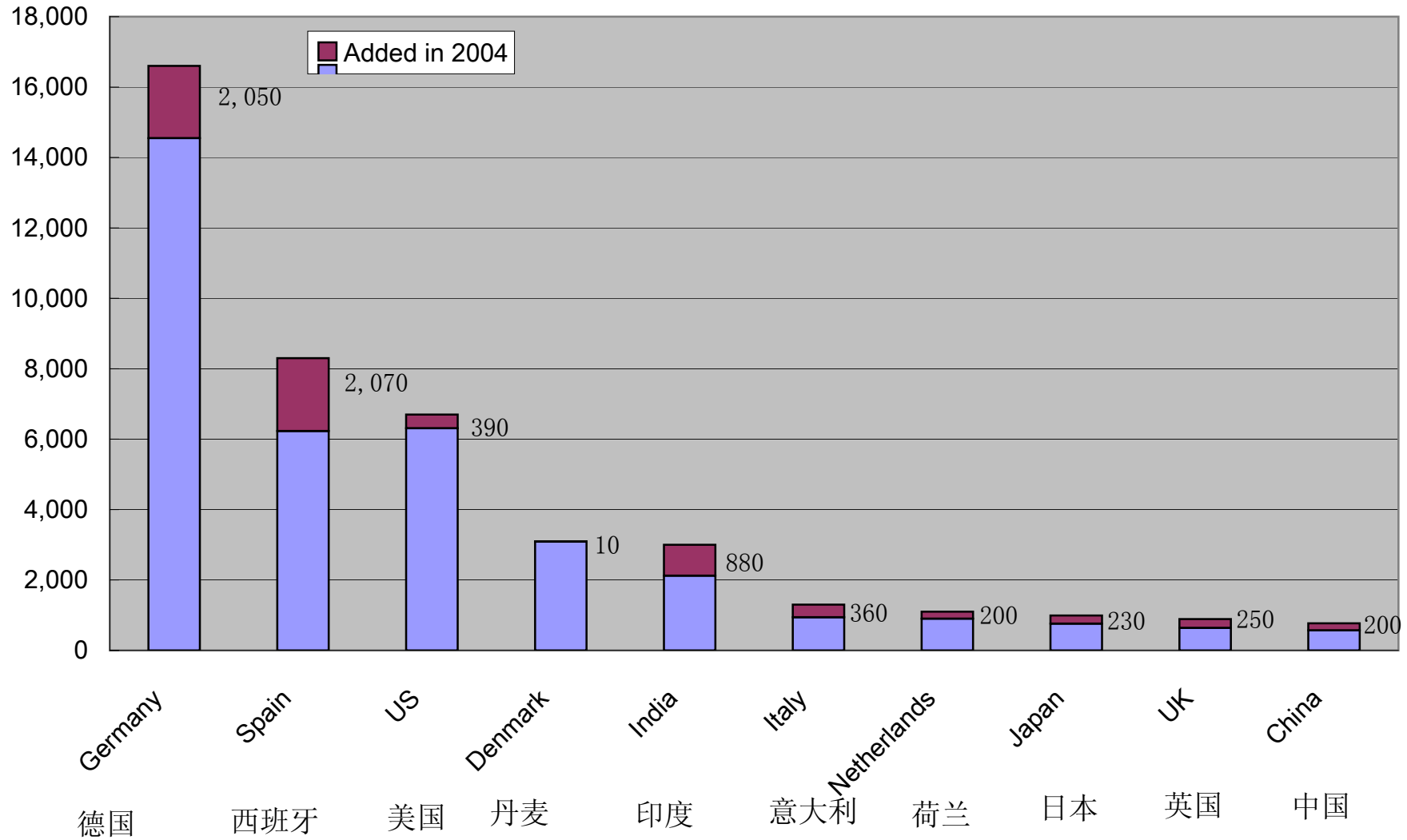
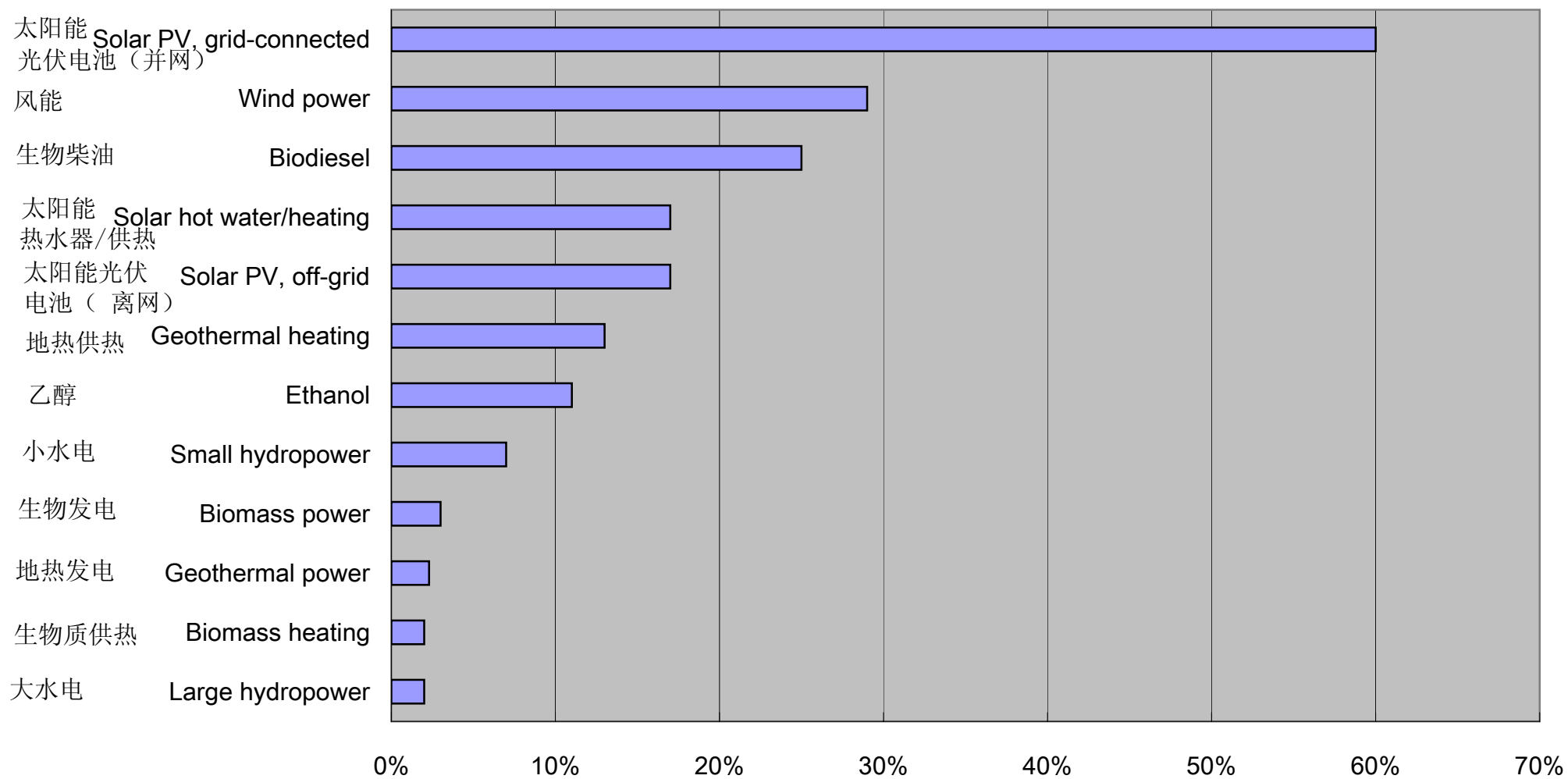


图2：可再生能源总量平均年增长率，2000-2004

Figure 2: Average Annual Growth Rates of Renewable Energy Capacity, 2000-2004



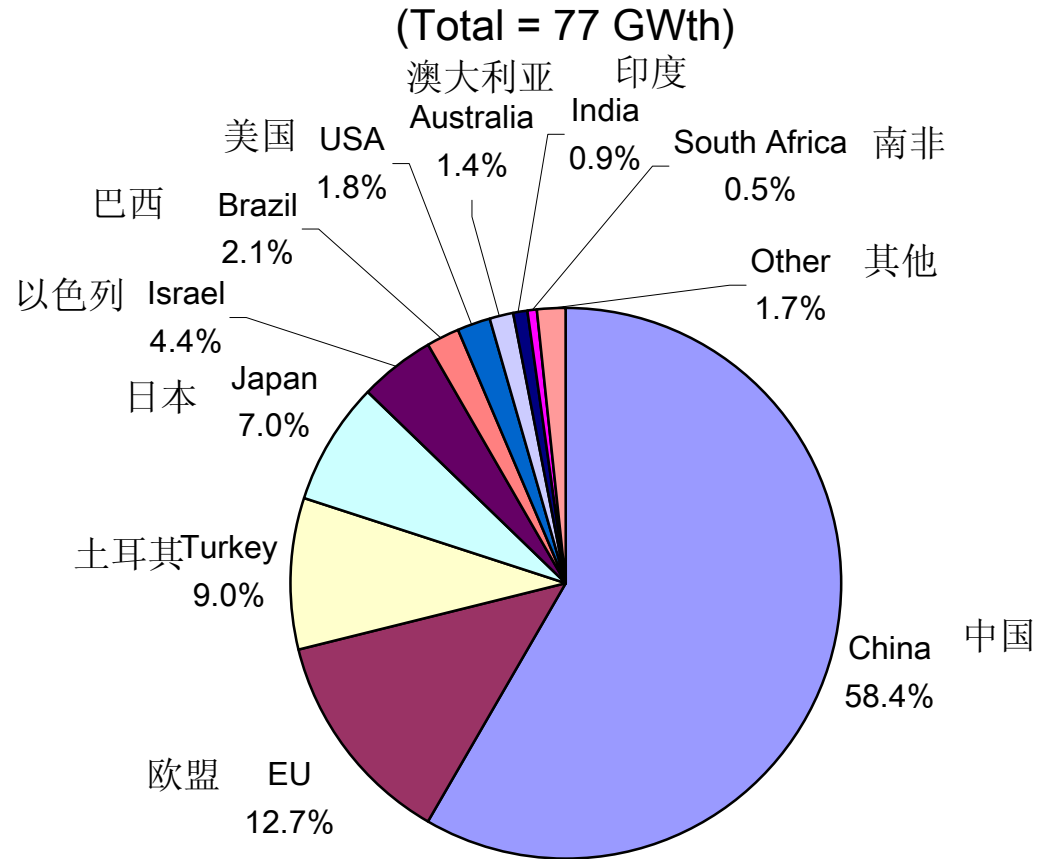
Global Market Overview – Hot Water/Heating

全球市场概览-- 热水器/供热

- Rooftop solar collectors provide hot water to nearly 40 million households worldwide, most of these in China
太阳能热水器为全世界近 4 千万家庭（多数为中国家庭）提供热水。
- Biomass-fueled heating provides five times more heat worldwide than solar and geothermal combined.
生物质燃料供热量比太阳能和地热能供热量大 5 倍。

图7：2004年太阳能热水器/供热容量（总容量=77GWth）

Figure 7: Solar Hot Water/Heating Capacity Existing in 2004



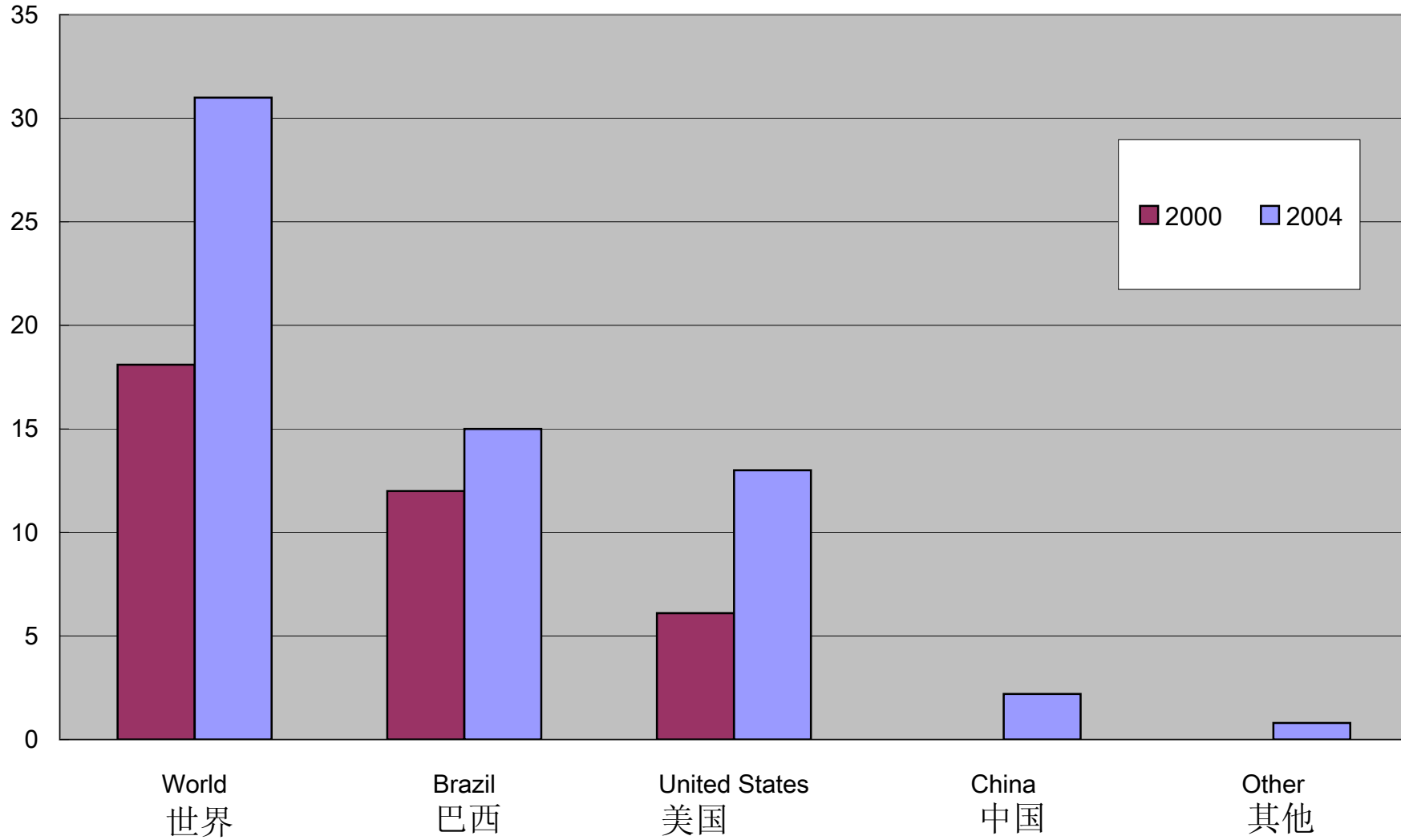
Global Market Overview – Biofuels

全球市场概览--乙醇和生物柴油

- Production of biofuels (ethanol and biodiesel) exceeded 33 billion liters in 2004, about 3 percent of the 1,200 billion liters of gasoline consumed globally.
生物质燃料（乙醇和生物柴油）2004 年生产量超过 330 亿升，约合世界汽油年消耗量（12000 亿升）的 3%。
- Ethanol provided 44 percent of all (non-diesel) motor vehicle fuel consumed in Brazil in 2004
巴西 2004 年 44% 的交通燃料为乙醇。
- Ethanol was being blended with 30 percent of all gasoline sold in the United States.
美国 30% 的汽油掺混乙醇。

图9：2000年和2004年燃料乙醇生产量（10亿升/年）

Figure 9: Fuel Ethanol Production, 2000 and 2004 (billion liters/year)



Investment Flows

投资

- Large commercial banks are starting to notice renewable energy, and several are adding renewable energy investments to their lending portfolios.
大商业银行开始关注可再生能源，有些已经开始把可再生能源投资作为他们新的投资方向。
- Major investments and acquisitions have been made in recent years by leading global companies, such as GE, Siemens, Shell, BP, Sanyo, and Sharp.
国际大公司，像通用，西门子，壳牌，英国石油，三洋和夏普，近年有大笔投资和采购
- Five of the largest electrical equipment and aerospace companies in China have decided to enter the wind power business.
中国最大的电器设备和航空公司中的五家已经决定进军风电业。
- About \$30 billion was invested in renewable energy worldwide in 2004. Investment in large hydropower was an additional \$20–25 billion.
2004 年世界可再生能源投资量约为 300 亿美元此外，大水电投资量为 200-250 亿美元。

Investment Flows (continued)

投资（续）

- \$500 million per year for renewable energy goes to developing countries from KfW, World Bank, GEF, and many other donors and programs.
德国复兴银行，世界银行，全球能源基金以及其他一些捐赠者和项目每年向发展中国家的可再生能源项目投资 5 亿美元。
- Government support for renewable energy was on the order of \$10 billion in 2004 for the United States and Europe, including budget funds and policy support.
美国和欧洲 2004 年对可再生能源的政府支持在 100 亿美元的量级，包含资金支持和政策支持。
- US and Europe provide more than \$700 million per year for research and development.
美国和欧洲每年在研发领域投入 7 亿多美元。

Policy Landscape

政策规划

- At least 48 countries worldwide now have some type of renewable energy promotion policy, including 14 developing countries.
至少 48 个国家，含 14 个发展中国家，已有促进可再生能源的政策。
- By 2005, at least 32 countries and 5 states/provinces had adopted feed-in policies, more than half of which have been enacted since 2002.
截至 2005，至少 32 个国家和 5 个省区采用了购电法（固定电价）政策，一半以上始于 2002 年。
- In 2005, China adopted its own feed-in policy, becoming only the sixth developing country to do so.
2005 年，中国制定了其购电法（固定电价）政策，成为第六个采取该措施的发展中国家。
- At least 32 states or provinces have enacted RPS policies, half since 2003. Six countries have enacted national RPS policies since 2001.
至少 32 个省区制定了可再生能源份额标准，一半始于 2003。6 个国家从 2001 年起在全国范围内实行可再生能源份额标准。

Table 4: Renewable Energy Promotion Policies 表 4: 推进可再生能源发展的政策

Country 国家	Feed-in tariff 购电 法	Renewable portfolio standard 份额标准	Capital subsidies, grants, or Rebates 资本补贴/ 折扣	Investment excise, or other tax credits 投资减免 税	Sales tax, energy tax, VAT reduction 销售减免 税	Tradable renewable energy certificates 新能源证书	Energy production payments/ tax credits 生产补贴及 减免税	Net Metering 净计量	Public investment, loans, or financing 公共资金支 持	Public competitive bidding 投标政策
Developed and transition countries (34) 发达国家及过渡性国家										
Australia		X	X			X			X	
Austria	X		X	X		X				
Belgium		X	X	X		X		X		
Canada	(*)	(*)	X	X	X			(*)	X	(*)
Cyprus	X		X							
Czech Republic	X		X	X	X	X		X		
Denmark	X			X		X		X		
Estonia	X				X					
Finland			X		X	X	X			
France	X		X	X	X	X			X	X
Germany	X		X	X	X				X	
.....and 23 other developed and transition countries 及 23 个其它发达国家										
Developing countries (14) 发展中国家										
Argentina			X				X			
Brazil	X								X	
Cambodia			X							
China	X		X	X	X				X	X
Costa Rica	X									
Guatemala				X	X					
India	(*)	(*)	X	X	X				X	X
Indonesia	X									
Mexico				X				X		
Nicaragua	X			X						
Philippines				X	X				X	
Sri Lanka	X									
Thailand	X	X	X					X		
Turkey	X		X							

图12：制定购电法（固定电价）政策的国家/州/省累计数目

Figure 12: Cumulative Number of Countries/States/Provinces Enacting Feed-in Policies

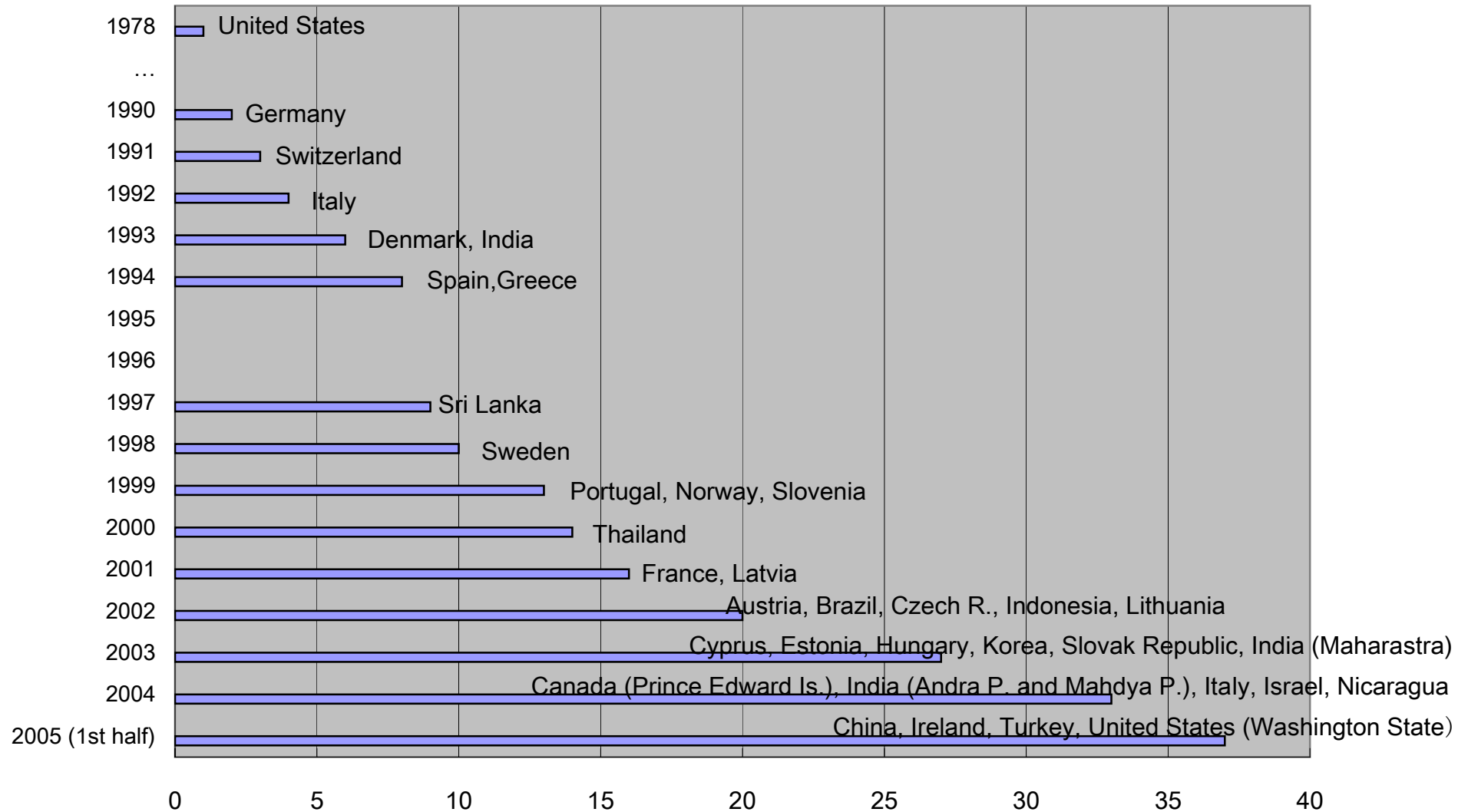
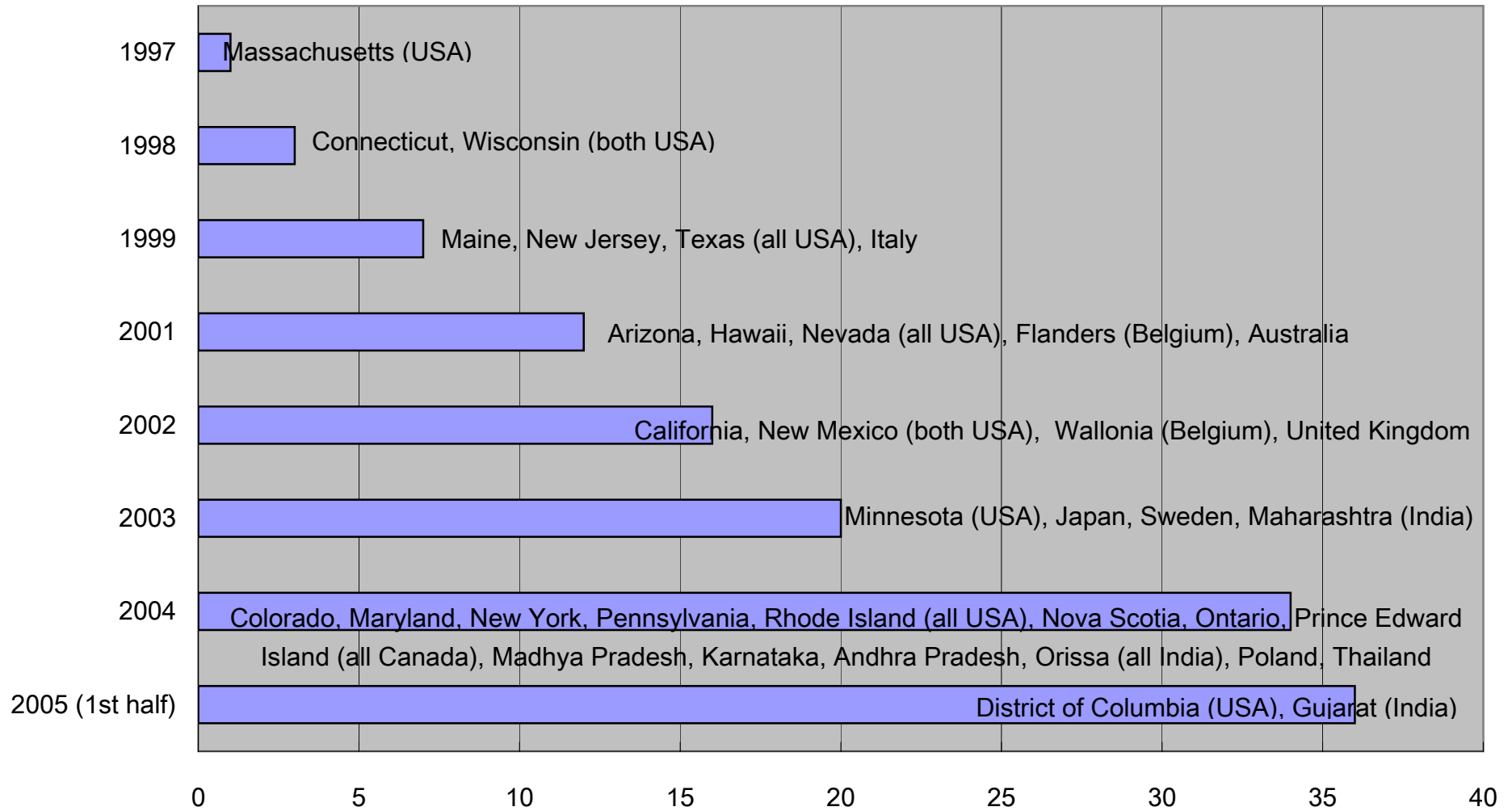


图13: 制定可再生能源份额标准的州/省/国家累计数目

Figure 13: Cumulative Number of States/Provinces/Countries Enacting RPS Policies



Policy Landscape (continued)

政策规划（续）

- Mandates for blending biofuels into vehicle fuels (5-10%) have been enacted in at least 20 states/provinces worldwide, including: Ontario (Canada), Hawaii, Minnesota, Montana (US), Heilongjiang, Jilin, Liaoning Henan (China).
至少 20 个国家和地区，包括：安大略（加拿大），夏威夷，明尼苏达，蒙大拿（美国），黑龙江，吉林，辽宁，河南（中国），颁布了汽车燃料掺混生物燃料（5-10%）的条例。
- Brazil has been the world leader in promoting biofuels. All gasoline must be blended with ethanol and gas stations sell both pure ethanol and ethanol blends.
巴西在促进生物质燃料方面走在世界前列。所有汽油必须掺混乙醇，加油站卖纯乙醇和含乙醇汽油。
- There are more than 4.5 million green power consumers in Europe, US, Canada, Australia, and Japan (Europe 3.9 million, US 500,000, Australia 70,000, Japan 60,000, and Canada 10,000).
欧洲，美国，加拿大，澳大利亚和日本的绿色电力用户超过了 450 万（欧洲 390 万，美国 50 万，澳大利亚 70 万，日本 60 万，加拿大 1 万）。

Policy Landscape (continued)

政策规划（续）

- Municipalities around the world are also setting targets for future shares of renewable energy. Some cities have established CO₂-reduction targets.
世界上一些自治市也在制定可再生能源发展目标。其中一些制定了二氧化碳减排目标。

Table 7: Selected Major Cities with Renewable Energy Goals and/or Policies

表 7: 有可再生能源目标和/或政策的大城市

City 城市	Renewable energy goals 可再生能源目标	CO₂ reduction goals CO ₂ 减排目标	Policies for solar hot water 太阳能热水器政策	Policies for solar PV 太阳能光伏电池政策	Urban planning, pilots 城市规划, 示范性工程
Adelaide, Australia	X	X			X
Barcelona, Spain	X	X	X	X	X
Cape Town, South Africa	X	X			X
Chicago, USA	X				
Daegu, Korea	X	X			X
Freiburg, Germany	X	X		X	X
Göteborg, Sweden					X
Gwangju, Korea	X	X			X
The Hague, Netherlands		X			
Minneapolis, USA	X				X
Oxford, UK	X	X	X	X	X
Portland, USA	X	X	X	X	X
Qingdao, China					X
Santa Monica, USA					X
Sapporo, Japan		X			X
Toronto, Canada		X			
Vancouver, Canada		X			

Policy Landscape (continued)

政策规划（续）

- Policy targets exist in at least 45 countries worldwide, including 10 developing countries, all 25 EU countries, and many states/provinces in the US and Canada.
45 个国家，含 10 个发展中国家，全部 25 个欧盟国家，美国和加拿大多数州，制定了政策目标。
- China has a proposed development target of 10 percent of total power capacity by 2010. This target would mean 60 GW of renewables capacity by 2010, two-thirds more than today's 37 GW capacity.
中国初步设想到 2010 年可再生能源的装机容量可占到总装机容量的 10%，达到 60GW，这意味着比目前的 37GW 增加了三分之二以上。

图11：欧盟可再生能源发展目标——2010年发电份额

Figure 11: EU Renewable Energy Targets -- Share of Electricity by 2010

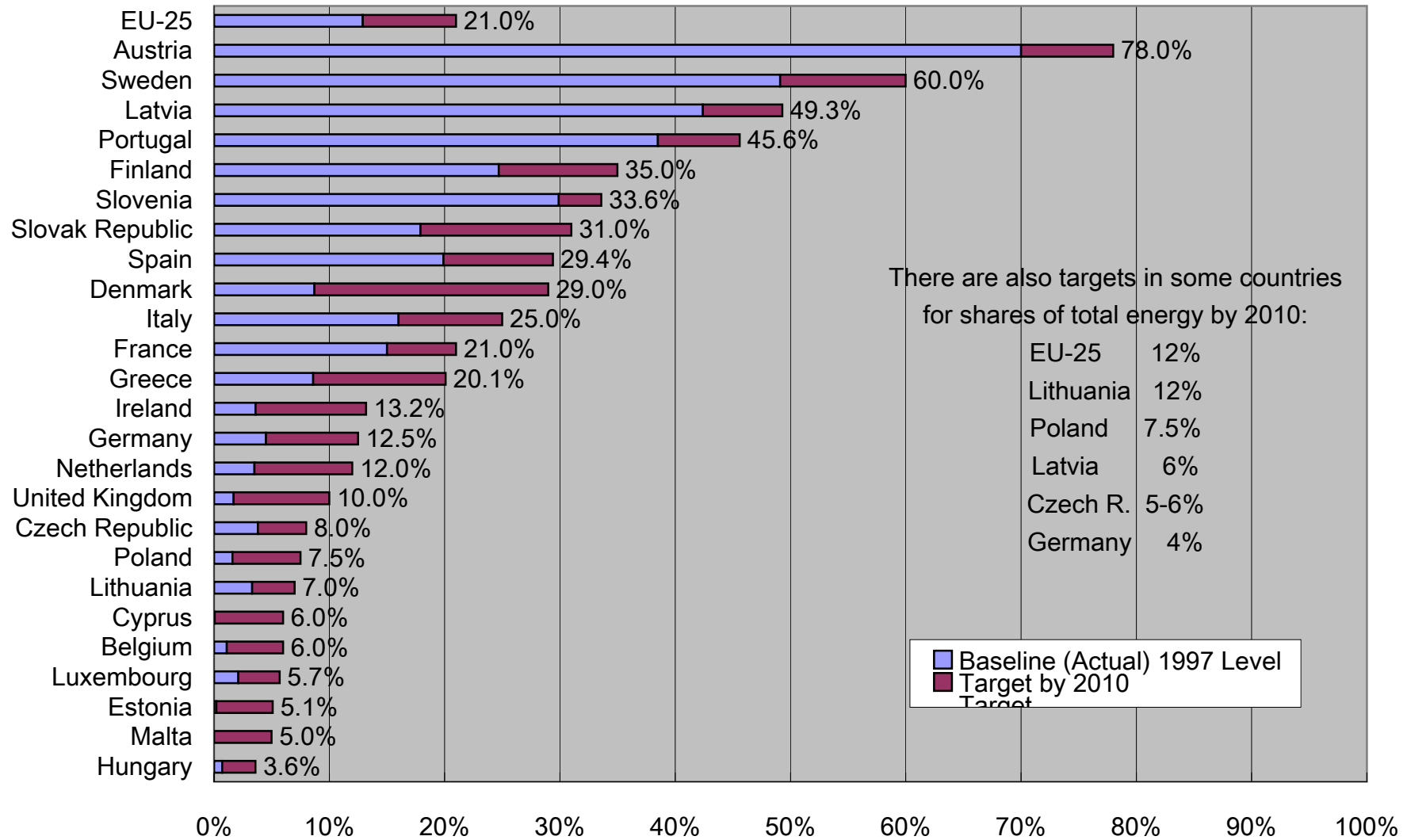


Table 3. Non-EU Countries with Renewable Energy Targets

Country	Target(s)
Australia	9.5 TWh of electricity annually by 2010
Brazil	3.3 GW added by 2006 from wind, biomass, small hydro
Canada	3.5% to 15% of electricity in 4 provinces; other types of targets in 6 provinces
China	10% of electric power capacity by 2010 (expected 60 GW); 5% of primary energy by 2010 and 10% of primary energy by 2020
Dominican Rep.	500 MW wind power capacity by 2015
Egypt	3% of electricity by 2010
India	10% of added electric power capacity during 2003-2012 (expected/planned)
Israel	2% of electricity by 2007; 5% of electricity by 2016
Japan	1.35% of electricity by 2010, excluding geothermal and large hydro (RPS)
Korea	7% of electricity by 2010, including large hydro, and 1.3 GW of grid-connected solar PV by 2011, including 100,000 homes (0.3 GW)
Malaysia	5% of electricity by 2005
Mali	15% of energy by 2020
New Zealand	30 PJ of added capacity (including heat and transport fuels) by 2012
Norway	7 TWh from heat and wind by 2010
Philippines	4.7 GW total existing capacity by 2013
Singapore	50,000 m ² (~35 MWth) of solar thermal systems by 2012
South Africa	10 TWh added final energy by 2013
Switzerland	3.5 TWh from electricity and heat by 2010
Thailand	8% of total primary energy by 2011 (excluding traditional rural biomass)
United States	5% to 30% of electricity in 18 states (including DC)

表 3:非欧盟国家利用可再生能源的目标

国家	目标
澳大利亚	2010 年年发电量达到 9.5TWh
布鲁塞尔	2006 年新增风力、生物质能、小水电发电装机容量达到 3.3GW
加拿大	其中 4 省可再生能源发电装机容量在总装机容量中的比例达到 3.5%-15%；其他 6 省也有相应的目标
中国	2010 年达到全国总电力装机容量的 10%（预计为 60GW）；2010 年在一次能源中所占比例达到 5%，2020 年达到 10%
多米尼加共和国	2015 年风力装机容量达到 500MW
埃及	2010 年可再生能源发电所占比例达到 3%
印度	2003-2012 年间新增发电装机容量的 10%（预测或计划）
以色列	2007 年可再生能源发电所占比例达到 2%；2016 年比例达到 5%
日本	2010 年可再生能源发电所占比例达到 1.35%，不包括地热能发电和大水电（可再生能源配额制）
韩国	2010 年可再生能源发电所占比例达到 7%，包括大水电；2011 年太阳能光伏并网发电装机容量达到 1.3GW, 包括 100, 000 户户用光伏发电装机容量（0.3GW）
马来西亚	2005 年可再生能源发电所占比例达到 5%
马里	2020 年可再生能源所占比例达到 15%
新西兰	2012 年增加的装机容量达到 30PJ(包括热能和运输燃料)
挪威	2010 年使用热能和风能达到 7TWh
菲律宾	2013 年总装机容量达到 4.7GW
新加坡	2012 年太阳能积热面积达到 50, 000 平方米（约为 35MWth）
南非	2013 年增加的终端用能达到 10TWh
瑞士	2010 年发电量和热能达到 3.5TWh
泰国	2011 年可再生能源在一次能源中的比例达到 8%（不包括用传统技术利用的农村生物质能）
美国	18 个州可再生能源发电所占比例达到 5%到 30%（包括哥伦比亚特区）

Comparison of China with International Targets

中国利用可再生能源的目标与国际的比较

Target 目标	Share of primary energy from renewables 可再生能源在一次能源中的比例	Share of electricity from renewables 可再生能源发电份额
China development target 中国发展目标 (初步设想)	5% by 2010 and 10% by 2020 2010 年达到 5% 2020 年达到 10%	10% by 2010 and 20% by 2020 2010 年达到 10% 2020 年达到 20%
EU target 欧盟目标	12% by 2010 2010 年达到 12%	21% by 2010 2010 年达到 21%
U.S. state-level targets 美国国家目标		5-30% by 2010-2012 2010-2012 年间达到 5-30%
Canada province targets 美国国家目标		1% to 15% by 2010 2010 年达到 1-15%
Thailand target 泰国目标	8% by 2011 2011 年达到 8%	
Korea target 韩国目标		7% by 2010 2010 年达到 7%

Rural (Off-Grid) Renewable Energy

农村（离网）可再生能源

- **Renewable energy, especially small hydropower, biomass, and solar PV, provides electric power, heat, motive power, and water pumping for tens of millions of people in rural areas of developing countries.**
可再生能源，特别是小水电，生物能，太阳能光伏电池为发展中国家数以千万计的农业人口提供电，热，动力，取水
- **Renewables serve agriculture, small industry, homes, schools, and other community needs.**
可再生能源服务于农业，小工业，家庭，学校和其他社会需求
- **16 million households cook and light their homes with biogas, and 2 million households use solar lighting systems.**
1600 万家庭使用沼气做饭和照明，200 万家庭使用太阳能照明系统

Table 8: Common Existing Applications of Renewable Energy in Rural (Off-Grid) Areas

Energy services	Renewable energy applications	Conventional alternatives
Cooking (homes, commercial stoves and ovens)	<ul style="list-style-type: none">● biomass direct combustion (fuel wood, crop wastes, forest wastes, dung, charcoal, and other forms)● biogas from household-scale digester● solar cookers	LPG, kerosene
Lighting and other small electric needs (homes, schools, street lighting, telecomm, hand tools, vaccine storage)	<ul style="list-style-type: none">● hydropower (pico-scale, micro-scale, small-scale)● biogas from household-scale digester● small-scale biomass gasifier with gas engine● village-scale mini-grids and solar/wind hybrid systems● solar home systems	Candles, kerosene, batteries, central battery recharging, diesel generators
Process motive power (small industry)	<ul style="list-style-type: none">● small hydro with electric motor● biomass power generation and electric motor● biomass gasification with gas engine	Diesel generators
Water pumping (agriculture & drinking)	<ul style="list-style-type: none">● mechanical wind pumps● solar PV pumps	Diesel pumps
Heating and cooling (crop drying and other agricultural processing, hot water)	<ul style="list-style-type: none">● biomass direct combustion● biogas from small- and medium-scale digesters● solar crop dryers● solar water heaters● ice making for food preservation	LPG, kerosene, diesel generators

表 8: 农村（离网）常用可再生能源装置

能源用途	可再生能源装置	替代常规能源
做饭 (家庭, 商用炉)	<ul style="list-style-type: none"> • 生物质直接燃烧 (燃用木柴, 秸秆, 薪柴, 牲畜粪便, 木炭, 其他) • 家庭沼气 • 太阳灶 	液化石油气, 煤油
照明和其他小型电器需要 (家庭, 学校, 路灯, 电信, 日常用具, 疫苗存储)	<ul style="list-style-type: none"> • 水电 (超小尺度, 微笑尺度, 小尺度) • 家庭沼气 • 小型生物质气化炉及动力装置 • 乡村小型电网, 太阳能/风能混合系统 • 太阳能家用系统 	蜡烛, 煤油, 电池, 中央电池充电, 柴油发电机
过程动力 (小工业)	<ul style="list-style-type: none"> • 小水电 • 生物质发电 • 生物质气化 	柴油发电机
水泵 (灌溉&饮用)	<ul style="list-style-type: none"> • 风力机械泵 • 太阳能光伏泵 	柴油泵
取暖和制冷 (农作物烘干和其他农业用途, 热水)	<ul style="list-style-type: none"> • 生物质直接燃烧 • 小型和中型沼气池 • 太阳能烘干机 • 太阳能热水器 • 食物储存制冰 	液化石油气, 煤油, 柴油发电机

Sidebar 1: Bonn Action Programme in International Context

补充说明 1: 国际背景下的波恩行动计划

Metric 指标	Bonn Action Programme Content 波恩行动计划内容	Global Context (2004) 全球背景 (2004)
1. Installed capacity 装机容量	Adds 163 GW of renewable electricity capacity. 增加 163GW 可再生能源发电	Existing capacity of renewable energy is 160 GW plus 720 GW for large hydro 现有的可再生能源装机容量是 160 GW，加上 720 GW 的大型水电
2. Investment 投资	Implies total investment of \$326 billion. 意味着 3260 亿美元的总投资	Global annual investment in renewables is \$30 billion plus \$20-25 billion for large hydro 全球可再生能源的投资为 300 亿美元，加上 200–250 亿美元的大型水电的投资
3. CO ₂ emissions 二氧化碳减排	Implies CO ₂ reductions of 1.2 billion tons/year by 2015. 意味着到 2015 年二氧化碳每年的减排量为 12 亿吨	CO ₂ reduction from renewables is 0.9 billion tons/year plus 3.7 billion tons/year from large hydro 可再生能源减少二氧化碳的排放量为 9 亿吨/年，加上大型水电减少 37 亿吨/年的二氧化碳排放量
4. Donor financing 捐赠资金支持	Donor financing over \$50 billion 捐赠资金支持超过 500 亿美元	\$500 million/year flowing to developing countries. 5 亿美元/年流入发展中国家
5. Access to electricity in rural areas 农村电力情况	Endorses MDG goal that up to 1 billion people could have access to energy services from renewables by 2015 签署 MDG 目标，即到 2015 年，将有 10 亿人可得到可再生能源的服务	Tens of millions of rural homes served by small hydro, 16 million using biogas, 2 million with solar home lighting 几千万农村家庭得到了小水电的服务，1600 万使用沼气，200 万拥有太阳能家庭照明

Conclusion: Strong Trends and a Significant Future

强大的发展趋势和未来的重要地位

- **Strong growth trends and increasing significance relative to conventional energy.**
强大的增长趋势和相对常规能源来说越来越重要的地位。
- **\$30 billion invested in renewable energy worldwide in 2004, including financing from major commercial banks and other large investors.**
2004 年，全球投入可再生能源方面的资金可达 300 亿美元，包括来自主要的商业银行的资金支持和其它的大的投资者。
- **Over 1.7 million jobs in the renewable energy industry worldwide.**
世界范围的可再生能源工业领域可提供超过 17 亿个工作岗位。
- **At least 48 countries worldwide have policies to promote renewable energy, including 14 developing countries.**
世界范围至少 48 个国家实施了促进可再生能源发展的政策，包括 14 个发展中国家
- **Millions of rural households served by renewable energy and millions more targeted by rural development policies.**
几百万农村家庭得到了可再生能源的服务，农村的发展政策目标是还将有几百万得到可再生能源的服务。
- **A large share of investment in China, \$5-6 billion in 2004, mostly for small hydro and solar hot water.**
大部分投资在中国，2004 年为 50-60 亿美元，大部分是投向小型水电和太阳能热水器。