

# Assessing the Investment Landscape for 5 to 30 MW Projects

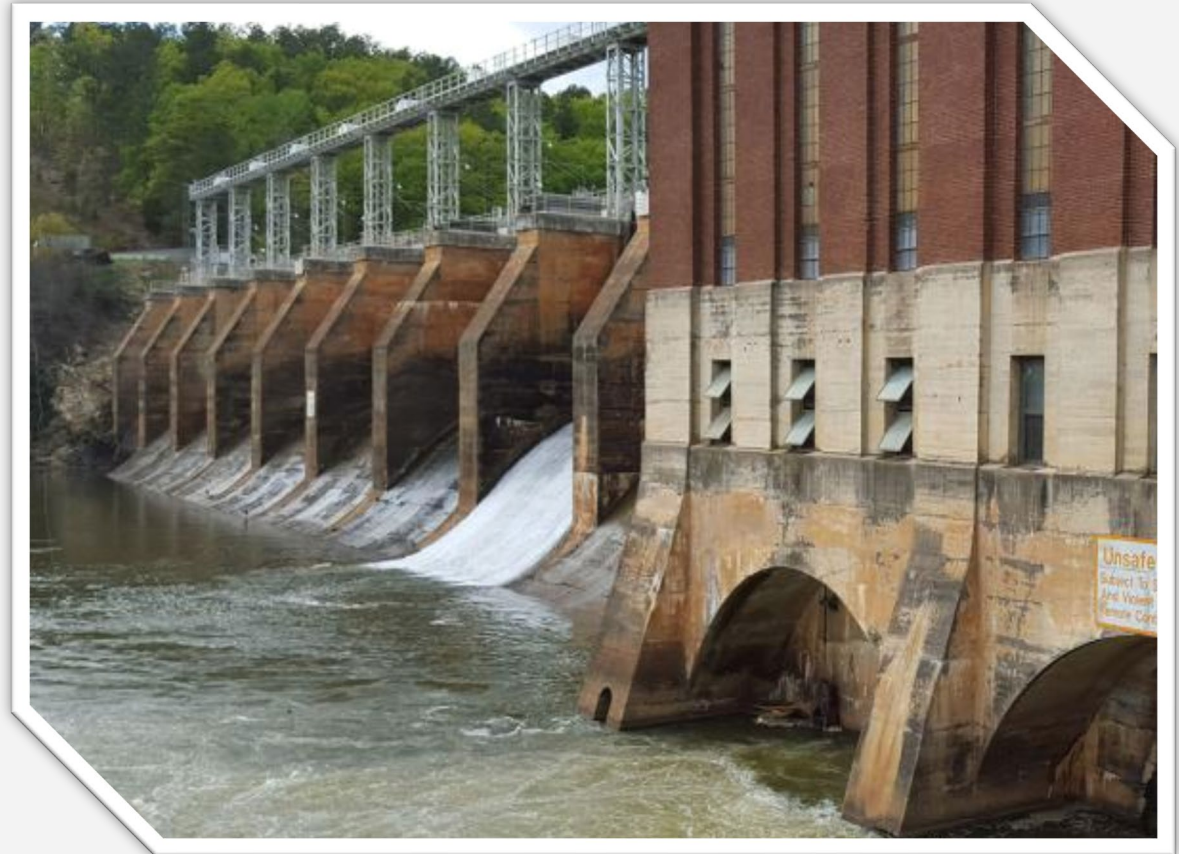
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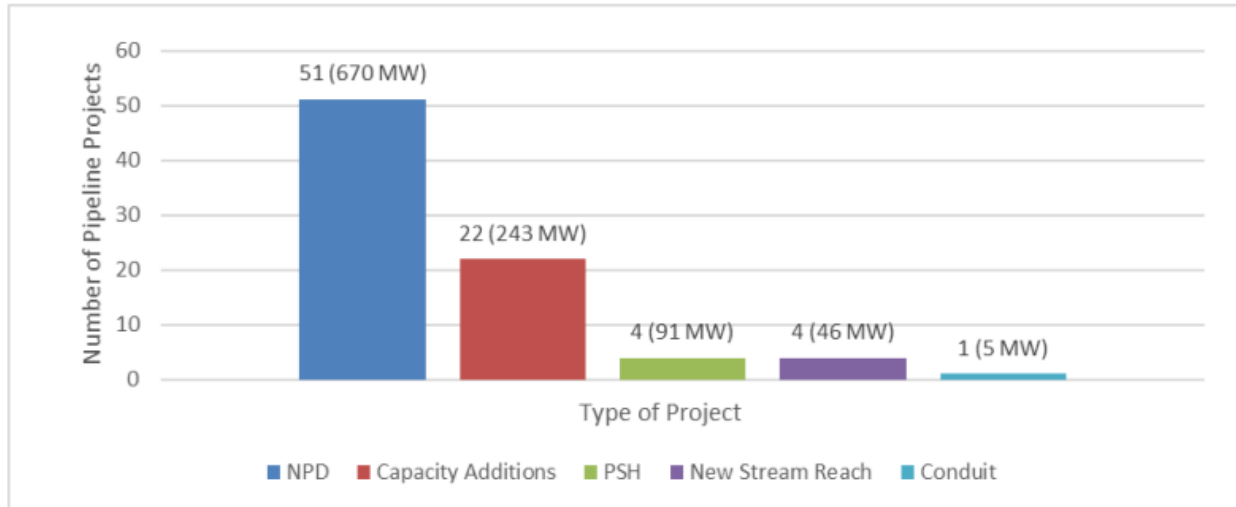
# Investment Opportunity Overview

- The clean energy transition will require flexible generation sources
- Many in the ecosystem assume hydro resources and investment opportunities are largely tapped out.
- There are more and more innovative solutions in hydro that can either expand upon existing generation or create new generation
- Some of these include:
  - Pumped Storage – open and closed loop facilities
  - Capacity additions and efficiency improvements to existing facilities
  - Conduits
  - Non-powered dams
  - New stream reach development



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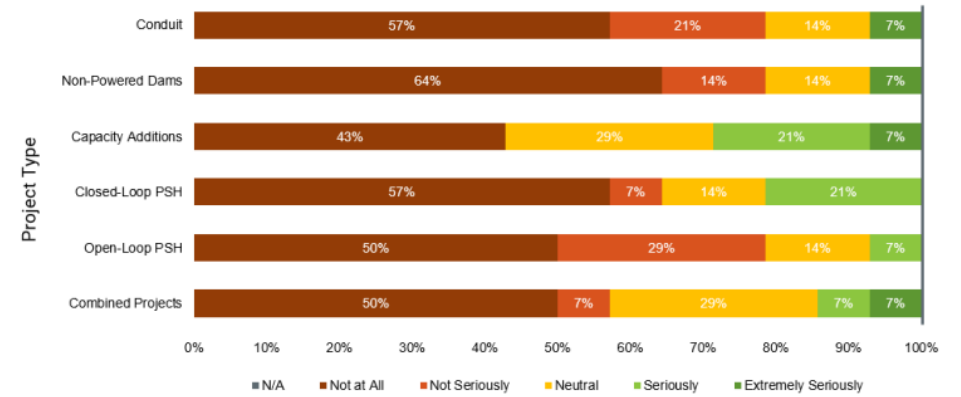
# Investment Pipeline and Sentiment



**Figure 3. Number of medium-sized pipeline projects by type (82 projects totaling 1,056 MW).**

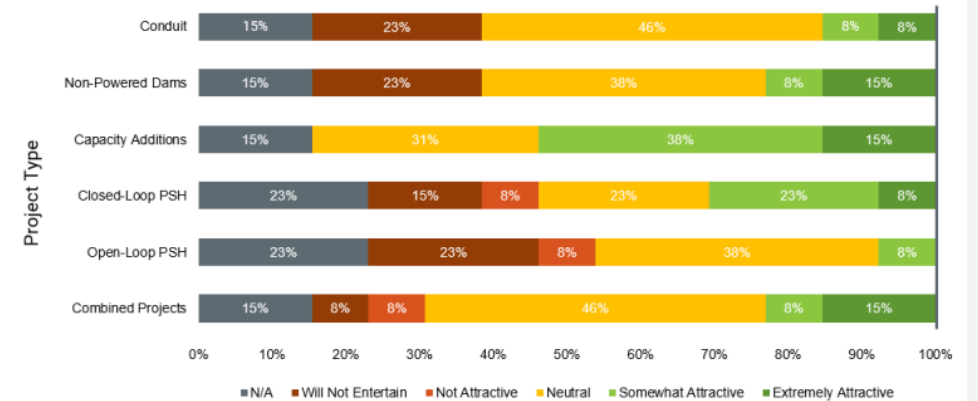
Data source: Johnson, Kao, and Uriá-Martínez (2023)

Over the last 5 years, how seriously has your organization considered investing in the following types of medium-sized hydropower/PSH projects? (n = 14)



**Figure 5. Investor sentiment on past investments by project type**

Over the next 5 years, how attractive does your organization view the investment opportunity for the following types of medium-sized hydropower/PSH projects? (n = 13)



**Figure 6. Future investor sentiment by project type**



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# Panelists



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