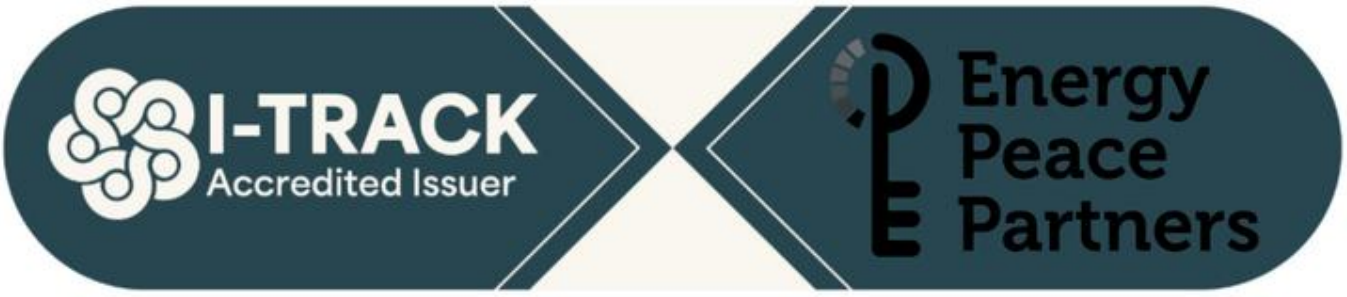

COUNTRY ASSESSMENT REPORT HAITI

Version: 2.0

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Contents

1.1 Country Assessment Report

Country Name	Haiti
Introduction	Haiti, located on the western portion of Hispaniola, remains the poorest country in the Western Hemisphere despite its historic significance as the first Black republic to gain independence. Long characterized by deep socio-economic vulnerability, the government has entered a period of heightened political and security instability that is increasingly shaping its development trajectory. The country continues to face overlapping crises: widespread gang violence, declining state authority, and persistent governance challenges have strained public institutions and disrupted economic activity. These pressures compound Haiti's chronic exposure to natural disasters, earthquakes, hurricanes, and flooding, which repeatedly damage infrastructure and hinder service delivery. As a result, poverty remains widespread, institutional capacity is weak, and public investment is severely constrained. The energy sector is among the areas most affected. Even before the recent instability, Haiti's electricity system struggled with limited access; only about 51% of the population had electricity in 2023, and it was highly unreliable (Global Economy, 2023). Transmission and distribution losses are estimated at around 65%, reflecting ageing infrastructure, limited maintenance, and widespread non-technical losses. Rural access remains especially low, and overall demand is suppressed because service is intermittent and often unavailable for long periods. Escalating insecurity has further deteriorated conditions. Fuel transport has become less reliable, complicating operations at diesel-dependent power plants. Security risks have limited technicians' ability to maintain or repair generation and transmission assets, leading to longer outages and reduced available capacity. Damage and disruptions to key infrastructure, whether from civil unrest, vandalism, or an inability to secure facilities, have deepened the system's fragility and increased the frequency of service interruptions. In some areas, instability has forced the postponement of planned upgrades or delayed the deployment of renewable energy systems. Despite these challenges, Haiti continues to pursue decentralized and renewable energy solutions. Recent donor-supported projects, such as solar-battery systems for health facilities, have helped improve resilience for essential services. However, sustained progress will require stabilizing the security environment, strengthening institutions, and rebuilding the energy sector's operational capacity. The national energy mix remains dominated by imported fossil fuels, exposing Haiti to volatile global prices. Hydropower contributes a modest share but is hampered by siltation and ageing infrastructure. At the same time, modern renewables account for less than 1% of generation; nevertheless, recent initiatives signal movement toward a more resilient, decentralized energy future.

1.2 Electrical Generation and Demand

Generation	**Technology**	**Capacity (MW)**
	Wind Hydro Fossil/Thermal Biomass Solar	0 78 348.68 4 <2 Source: CCREE, 2022; IRENA, 2025
	Total	430.68
Demand	**Sector**	**Demand** (GWh)
	Residential	557

	Commercial/Service/Public Sector/ Transport Industrial Primary Activities	46 139 186 0 Source: IEA, 2023, IMF 2020
	Total	928

Electricity Generation
Haiti's grid-connected electricity supply remains heavily dominated by oil- and diesel-fired thermal plants. Recent data indicate that in 2025, fossil fuels accounted for about three-quarters of total electricity generation, while renewables contributed roughly 24%, almost all of it from hydropower (IRENA, 2025). Installed capacity is similarly skewed: of approximately 430 MW total, about 348MW is conventional (nearly all oil/diesel), and only approximately 82 MW is renewable. Hydroelectricity is still the principal renewable source, centred on the 54 MW Péligre plant and a few small hydro schemes; hydro produced around 200 GWh (23% of generation) in 2023 but remains highly vulnerable to drought, ageing infrastructure and social instability; Péligre was forced offline in September 2024 after protests and damage to key equipment (IRENA).
Solar PV is growing from a very low base: grid-related solar output was only about 4 GWh (1% of generation) in 2023. However, the government and development partners are promoting mini-grids, off-grid systems and new utility-scale capacity (IRENA). Among these is an announced 7.5 MW of additional PV linked to initiatives by TotalEnergies Haiti and partners, expected to be in place by the end of 2025.

Electricity Demand
On the demand side, residential consumption accounts for the bulk of electricity use in Haiti, reflecting rapid urbanization and a high population density, especially in and around Port-au-Prince. Commercial and public sector demand is much smaller, constrained by the limited activity and persistent outages that discourage investment and operation. Electrification in the transport and industrial sectors is minimal, with most transport relying on imported petroleum, and industries either running their own generators or operating in regions with irregular grid supply. Primary economic activities, such as agriculture, mainly rely on non-electrical energy sources, underscoring the very low rural electrification rate of about 2%. Overall, Haiti's electricity consumption per capita is among the lowest in the Western Hemisphere, and the country faces chronic challenges of unmet demand and poor service quality (IEA, 2024).

1.3 Electrical Interconnection and Import/Export

Connected country	**Capacity** (MW)	**Annual import from country** (GWh)	**Annual export to country** (GWh)
N/A	0	0	0

Additional information

Haiti currently has NO operational international electrical grid interconnections with any neighbouring countries, including the Dominican Republic. The government operates completely isolated electrical systems.

1. **National Grid Structure**
   - Haiti's electricity system comprises five isolated regional grids that are not interconnected even at the national level
   - The main grid serves Port-au-Prince and immediate surroundings
   - Other regions operate on small, isolated generators
   - No national transmission network exists to connect Haiti's regional systems

2. **Proposed Interconnection with the Dominican Republic**

Multiple proposals have been made since the 1990s to create an interconnection between Haiti and the Dominican Republic. A 55 km transmission line (138 kV) was proposed to connect Péligre to Port-au-Prince, with a capacity of 20-60 MW. Despite various announcements and proposals over the years, including interest from Dominican companies like Interenergy Group, no interconnection has been realised.

1.4 Market Structure

Overview of Market Structure
Haiti's electricity sector is still dominated by the state utility Électricité d'Haïti (EDH), which legally controls generation, transmission, distribution and sales. In reality, most grid power now comes from Independent Power Producers (IPPs) under bilateral PPAs, while many businesses and institutions self-generate. The system remains non-liberalized, with no competitive wholesale or retail market. The grid is fragmented into several isolated regional systems and mini-grids, and although a regulator (ANARSE) and new concession schemes exist, overall competition and financial sustainability are still very limited.

1. Generation

State-Owned Generation

- Électricité d'Haïti owns 44% of installed generation capacity but directly generates only 10% of the electricity supply. EDH operates major hydroelectric facilities, including Péligre (54 MW installed, 10-30 MW actual), and thermal plants, such as Varreux 1 and 2 (54 MW combined) and Carrefour (50 MW installed, 12 MW actual). Most facilities operate well below capacity due to poor maintenance and ageing infrastructure.

Independent Power Producers (IPPs)

- Independent Power Producers dominate electricity generation, producing approximately 90% of EDH's supply. Major IPPs include Sogener (primary supplier since 2005), E-Power (currently producing <10 MW due to technical issues), Haytrac, and PBM. IPPs operate under bilateral PPAs negotiated directly with EDH without competitive bidding. The sector suffered severe disruption in October 2019 when government payment suspensions forced two major producers to cease operations, resulting in a nearly 50% reduction in grid capacity in Port-au-Prince.

Off-grid generation

- The off-grid self-generation sector collectively produces more electricity than the official grid, serving households, businesses, and institutions through diesel generators and increasingly solar-plus-battery systems.

2. Transmission

- EDH maintains monopoly control over all transmission infrastructure, but Haiti lacks a true national transmission network. The five main regional grids (Port-au-Prince, Northern, Southern, Artibonite, and smaller systems) operate independently, with no interconnection. The transmission infrastructure has not been rehabilitated for over 40 years and is severely degraded, with single points of failure causing complete system collapse in affected regions. The June 2024 sabotage of five Péligre transmission towers resulted in widespread blackouts across Port-au-Prince, highlighting the system's vulnerability.

3. Distribution

- EDH holds the distribution monopoly, operating approximately 1,500 km of distribution lines, primarily concentrated in Port-au-Prince and major urban centres. The distribution network has not been rehabilitated for over 40 years and consists mainly of deteriorated medium- and low-voltage lines. Distribution losses represent the most significant component of EDH's 60-75% system losses, with commercial losses from theft accounting for 40-70% of the distributed electricity. Only 12.5% of connections are legally registered and paid.
- Service reliability is inferior even in areas nominally covered by the network. Port-au-Prince receives only 4-10 hours of electricity per day on a rotating schedule, while other urban areas receive even less. Some towns, including Fort-Liberté, have distribution infrastructure but have been effectively abandoned by EDH for approximately a decade, forcing complete reliance on private generators. Rural areas have limited distribution infrastructure, with only 2-12% of rural households having access to the grid.
- EDH announced plans in 2020 to install prepaid smart meters for several hundred thousand connections to improve billing and collections, but implementation has been severely limited due to funding constraints. ANARSE launched prequalification rounds (2020-2021) for regional grid concessions covering eight areas to transfer generation, transmission, and distribution to private operators. Still, these processes have stalled

due to political instability, and no concessions have been awarded.

Electricity Trading and Sales Mechanisms

- No national wholesale market or competitive power pool exists; electricity is traded via bilateral contracts between private generators and EDH or directly by mini-grid operators to end users. Prices are set administratively and tend to be among the highest in the region (typically USD0.60–USD0.90 per kWh).

Liberalization

- There is minimal market liberalization, though off-grid and mini-grid companies have expanded under donor support and special regulations.
- Reform initiatives launched between 2017 and 2021 included the establishment of ANARSE, announced plans to open generation, transmission, and distribution to private participation through concessions in eight regions, and the development of a mini-grid regulatory framework. However, implementation has been minimal due to political instability following the 2021 presidential assassination, 2019 government payment defaults to IPPs, security concerns, and institutional weakness.

Environmental Attribute Markets

I-REC(E) Standard (Primary System)

Haiti has been approved as an I-REC(E) country since December 2022, with Energy Peace Partners (EPP) serving as the authorised issuer for both standard I-REC(E) certificates and Peace Renewable Energy Credits (P-RECs).

Operational Track Record

- P-RECs or I-REC(E) are yet to be issued from Haiti; however, Energy Peace Partners has already identified a project in Haiti for P-REC issuance.
- No regulatory barriers or government opposition encountered so far.

Market Restrictions and Opportunities

- No National Registry: Haiti does not operate a national registry or certificate market beyond I-REC(E). All attribute ownership, use, and transfer are voluntary and comply with the standards set by the international platform and the country issuer.
- No Mandatory Policies: The Haitian government does not mandate certificate use, disclosure, or reporting as of 2025, but authorities are monitoring market evolution for future regulatory integration.
- Market Growth Potential: Expanding distributed solar, donor activities, and rising global demand for climate impact certificates continue to drive interest and participation in Haiti's I-REC(E) market.

1.5 Responsible Government Department

The key government institutions responsible for Haiti's electricity sector, renewable energy policy, and environmental regulation include:

- Ministry of Public Works, Transport, and Communication (MTPTC): The primary government ministry with authority over the electricity sector. MTPTC oversees energy policy and planning, formulates sector development strategies, and provides oversight for both conventional and renewable energy initiatives.
- Electricité d'Haïti (EDH): The state-owned national utility, responsible for electricity generation, transmission, distribution, and limited sector planning. EDH implements the roll-out of electrification projects and manages grid operations country-wide.
- National Energy Sector Regulatory Authority (ANARSE): Established to regulate and supervise the energy sector, ANARSE is charged with licensing, tariff setting, compliance oversight, and facilitating private sector participation, especially for renewable energy and mini-grid projects. The agency leads sector reforms, streamlines project approvals, and plays a central role in market liberalisation efforts.
- Ministry of Environment (Ministère de l'Environnement): Oversees environmental impact assessments (EIAs) for energy projects and enforces environmental standards related to power generation and infrastructure.
- National Electricity Regulatory Commission (CNER): A technical regulatory body, supporting license issuance and regulatory compliance for generators and distributors, often collaborating with MTPTC and ANARSE for broader regulatory reforms and policy support in the electricity sector.

For environmental attribute tracking, P-REC and I-REC(E), no ministry or agency currently acts as the official government contact point for these certificates; the system relies on sector-wide recognition and technical validation.

1.6 Existing/Planned Legislation

Existing Legislation

- The sector is now mainly governed by the Decree of 6 January 2016 on the electricity/energy sector, which establishes the legal, governance and regulatory framework for generation, transmission, distribution and commercialisation, and creates the national regulator ANARSE while confirming EDH's role as the state utility.
- Earlier statutes that created EDH as a state-owned utility (1970s–1980s), plus the 2016 decree, give it de facto monopoly control over grid-connected supply. These legacy instruments predate concepts such as renewable energy certificates and therefore do not address environmental attributes or carbon markets.
- The Energy Sector Development Plan 2007–2032 and the Draft Energy Policy of the Republic of Haiti (2012) remain key reference documents, promoting diversification towards domestic renewables and improved efficiency. The revised NDC (2022) commits Haiti to a 32% emissions reduction by 2030 (6.32% unconditional, 25.5% conditional), prioritising the energy sector. Still, it does not establish a legal framework for environmental attribute tracking or REC markets.
- Despite the preparation of a draft renewable energy law in 2017, the World Bank confirms that it has not been enacted, and the 2023 Haiti Energy Report Card still lists "RE/EE Act: Not established".
- The 2017–2018 Finance Act introduced exemptions from import duties for solar modules and inverters, and broader investment-promotion schemes can provide tax and customs incentives to energy projects. However, these measures target physical project development and equipment; they do not define or recognise environmental certificates (e.g. I-REC(E)) as a product class, nor do they specify their tax treatment.

Current energy and environmental laws neither explicitly support nor prohibit systems such as I-REC(E). There is no legal recognition of certificates, no registry rules, and no defined regulatory oversight for the issuance, transfer, or retirement of environmental attributes.

Planned and Developing Legislation

- Under the 2019 Energy Sector Master Plan and the PHARES programme, a detailed regulatory framework for mini-grids has been drafted in consultation with MTPTC, ANARSE and development partners. Work is ongoing on individual regulatory sections; to date, it has not yet been fully translated into a nationwide, operational mini-grid regime.
- ANARSE launched pre-qualification rounds in 2020–2021 for private concessions on several regional grids and new projects. Public sources describe these processes but do not yet report a mature portfolio of fully implemented concessions, reflecting broader political and institutional challenges.
- The 2023 Energy Report Card lists net billing/net metering and a feed-in tariff as "draft" and confirms that there is still no RE/EE Act. This indicates that key market-based support tools (FiT, net metering) are not yet in force at national scale.

Planned reforms focus on improving access, mini-grids and private participation in generation and distribution, but do not yet address environmental attribute tracking or REC markets, leaving a regulatory gap for instruments such as I-REC(E) and P-REC.

1.7 Environmental and Renewable Electricity Legislation

Key National Laws and Regulations

- Environmental Impact Assessment (EIA) Law (Law No. ENV-01-2006): Mandates environmental assessments for significant infrastructure, including energy projects, ensuring ecological protection is integrated in electricity sector investments.

- Nationally Determined Contribution (NDC) Update (2022): Haiti has committed to an unconditional 6.32% reduction in greenhouse gas emissions (GHG) relative to business-as-usual by 2030, increasing to 25.5% if international support is provided. The NDC outlines detailed measures for energy, agriculture, and other sectors, but does not yet legislate binding national renewable energy targets or require verification/disclosure of renewable electricity usage.
- National Energy Policy Framework: Focuses on expanding access, promoting renewable energy, and improving utility performance; it does not currently impose legally binding renewable generation quotas or attribute tracking, but supports strengthening frameworks for sustainable energy investment.

Enabling/Restrictive Provisions for Tracking Mechanisms

- No foundational Haitian law currently requires or regulates renewable electricity tracking systems, such as I-REC(E) or certificate-based support for renewable electricity, nor mandates disclosure or verification of renewable use in domestic markets. Certificate issuance and attribute tracking are thus governed through internationally recognised mechanisms, not national statutes.
- The existing legal environment is generally enabling toward renewable project development (via incentives and licensing). Still, the absence of national legal clarity on certificates and disclosure leaves the market partially reliant on international standards.

1.8 Existing/Planned Certificate or Support Systems

I-REC Status in Haiti

- Haiti has been an I-REC(E)-approved country since 2022, with Energy Peace Partners (EPP) serving as the authorised local Issuer, operating under the International Tracking Standard Foundation's (I-TRACK Foundation) governance framework. This establishes a credible, internationally recognised tracking system for renewable energy attributes in Haiti.

Other Certificate Systems and Compliance:

- Beyond I-REC(E) and P-REC, the carbon market is still small and project-based. A few early carbon projects (mainly clean cookstoves under CDM and Gold Standard) have been implemented. Still, high registration costs, long approval timelines, and weak capacity in the national DNA have limited scale-up. Recently, larger voluntary initiatives such as a major reforestation/land-restoration program targeting about 5 million tonnes of credits have driven growing foreign demand for Haitian offsets.
- There are no registry restrictions in Haiti for standard adoption; the issuance follows I-REC(E) rules and requirements, under international verification and registry operations. The national legal framework neither specifically restricts nor formally enables attribute registries but does not place any policy or technical barriers on their use or adoption.

Support Schemes

- Haiti's national subsidy and incentive structure emphasises concessional finance and project support for mini-grids or renewables, delivered through programs like the Off-Grid Electricity Fund (OGEF) and through competitive tenders for regional and stand-alone solar/hybrid grids. These programs expand renewable investment and energy access but are not linked to domestic REC mandates.
- The concessional support schemes and rural access tenders remain outside the direct scope of attribute certificates. However, projects supported by them may be eligible for I-REC(E) or P-REC issuance if they meet the verification criteria.

Registry Use, Restrictions, and Market Implications

- Haiti does not have any laws or national regulatory decisions that impede or restrict the use of the I-REC(E) registry or issuance platform, nor are there formal national standards for renewable tracking. EPP is responsible for registration, issuance, and verification within I-REC(E) protocols; however, as of 2025, there is no licensed governmental registry or monitoring mechanism in place.
- No national obligations exist for market actors to disclose or report renewable electricity usage based on attribute registry data. Attribute ownership, use, and transfer remain voluntary and are conducted in accordance with international best practices as recognised by the I-REC(E) framework.

1.9 Extent of Engagement with Government

The I-REC(E)/P-REC system operates without explicit legal authorization but also without legal prohibition or restriction. No barriers exist to registry participation, standard adoption, certificate transfer, or international trading.

Haiti lacks formal renewable energy support mechanisms that would create attribute ownership complexities. There are no feed-in tariffs, renewable portfolio standards, production tax credits, capital subsidies, or green electricity tariffs. This absence means no government financial support programs claim attribute ownership and no subsidy conditions restrict attribute transfer, creating a clear ownership path for private developers.

1.10 Expected Response from Government

There has been no contact made with any government agency in Haiti and so far and given that no I-REC(E) or P-REC have been issued in Haiti, EPP anticipates that there will be no government opposition, resistance, or political sensitivity regarding environmental attribute tracking systems. The government has not raised concerns about sovereignty, data privacy, foreign control of certification systems, or potential conflicts with national policy. This absence of opposition creates a permissive environment for voluntary system implementation, even without active government support or formal regulatory recognition.

1.11 Proposed Restrictions

Restrictions and Protections

- **Eligible Generation Types**
  - Only renewable energy sources as defined by the I-REC(E) standard (solar, hydro, wind, etc.) are eligible. No fossil-fuel or hybrid plants with fossil generation components are permitted for certificate issuance.
  - Mini-grid and distributed renewable projects are eligible if they meet I-REC(E) requirements for metering and verification.

- **Registry and Data Integrity**
  - The country issuer (EPP) is responsible for strict verification of project documentation, meter data, and compliance with I-REC(E) protocols to ensure no double issuance occurs (i.e., an MWh cannot be registered or certified in more than one tracking system).
  - To avoid double-counting, the registry restricts any single electricity generation to be associated with only one environmental attribute product at a time. Coordination with any potential national or donor-driven registry is mandatory if such a registry is developed in the future.

- **Grid Connectivity and System Boundaries:**
  - Both grid-connected and isolated (off-grid) renewable generators are eligible; there are no national limitations based on connectivity, provided the project is technically verifiable under I-REC(E) rules and not already participating in another certificate program.
  - I-REC(E) requirements mandate that generators applying for certificates declare whether electricity is supplied to the public grid, used behind the meter, or resides within a mini-grid to ensure accurate attribute allocation and registry assignment.

- **Government Approvals and Oversight:**
  - No additional Haitian government approvals are currently required for registry use, but the issuer may require evidence of project compliance with local laws, environmental licenses, and permits during registration.
  - ANARSE, the energy regulator, is monitoring REC market evolution, but as of 2025, has not introduced further national restrictions or exclusions.

- **Product and Participant Limitations:**
  - There are no explicit exclusions for project developers, utilities, or buyers unless they fail to meet I-REC(E) or P-REC standards (e.g., lack of monitoring, non-renewable technology, duplicate registration).
  - Projects with negative ecosystem or social impacts may be excluded from P-REC aggregation funds or peace-labelled certificates according to enhanced due diligence practices.

Enforcement and Future Safeguards

- All issuance is subject to EPP's discretion as country issuer, under I-REC(E) audit and verification requirements, which includes project-level checks to assure singular registration.
- Should Haiti introduce a national registry, further restrictions could be added to ensure there is full interoperability and no overlap with the international registry.
- No evidence exists of restrictions on certificate retirement, export, or sale, but all processes must be in line with I-REC(E) global compliance standards.

1.12 Any Other Relevant Information

RE Market Potential

Haiti has strong potential in the renewable energy market, primarily driven by sunlight, with emerging investments in wind and small hydro. Recent developments include significant international investments such as a $13.5 million solar energy project funded by IFC, IDB Invest, and the World Bank, aimed at supporting distributed solar PV, battery storage, and mini-grids to power underserved communities and healthcare centres. The Caribbean Development Bank has also approved a $5 million grant for rural electrification mini-grids, highlighting efforts to expand access and build more inclusive energy markets.

Historical Support or Development of Renewables

Haiti's government and development partners have pursued the expansion of renewable energy since the early 2010s, initially through donor pilots and off-grid rural projects. The National Regulation Authority (ANARSE) has played a central role in reforming concession contracts, enabling more transparent tendering and private sector participation in mini-grids and distributed solar initiatives. Regional partnerships, especially with CARICOM, support the development of technical and policy capacity, while national targets have historically focused on increasing the share of renewable energy rather than specific certificate markets.

Demand-side Market Potential or Strategic Nature of Market Development

Electricity demand in Haiti is relatively low compared to its regional peers, but grid unreliability and chronic outages have driven considerable interest in distributed renewable energy sources. Growing market awareness, rising diesel costs, and donor campaigns to promote productive use electrification are expected to strengthen demand-side market potential for renewable electricity and associated certificates over the coming years. Solar mini-grids and battery storage are increasingly critical for essential services, with anticipated market growth as technical and financing barriers decline.

Analysis of Political Disruptions or Market Risks

Political instability, persistent violence, and the breakdown of basic services continue to pose significant risks to investments, market development, and project implementation. Challenges to regulatory enforcement, vandalism, and insecurity threaten both grid and off-grid assets, while governance transitions can delay policy reforms. These risks elevate the importance of robust tracking systems and third-party verification for attribute certificates, as well as donor alignment in project funding and rollout.

Analysis of Regulatory Risks, Including Linkages with Carbon Markets and Support Systems

Regulatory risks centre on possible inconsistencies in market liberalisation timelines, limited domestic capacity for oversight of the certificate system, and the absence of a comprehensive national legal mandate for renewable tracking or carbon crediting. Current frameworks do not directly link renewable certificates with carbon market infrastructure or national emissions trading. Still, international climate partnerships, such as ICAT projects and NDC monitoring, may offer future opportunities to integrate registries and leverage carbon finance. Lessons from other

contexts suggest the value of harmonising attribute tracking with sector reforms, integrating donor support and climate goals, and enhancing registry transparency to ensure market credibility.

1.13 Author

Complete all fields.

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