

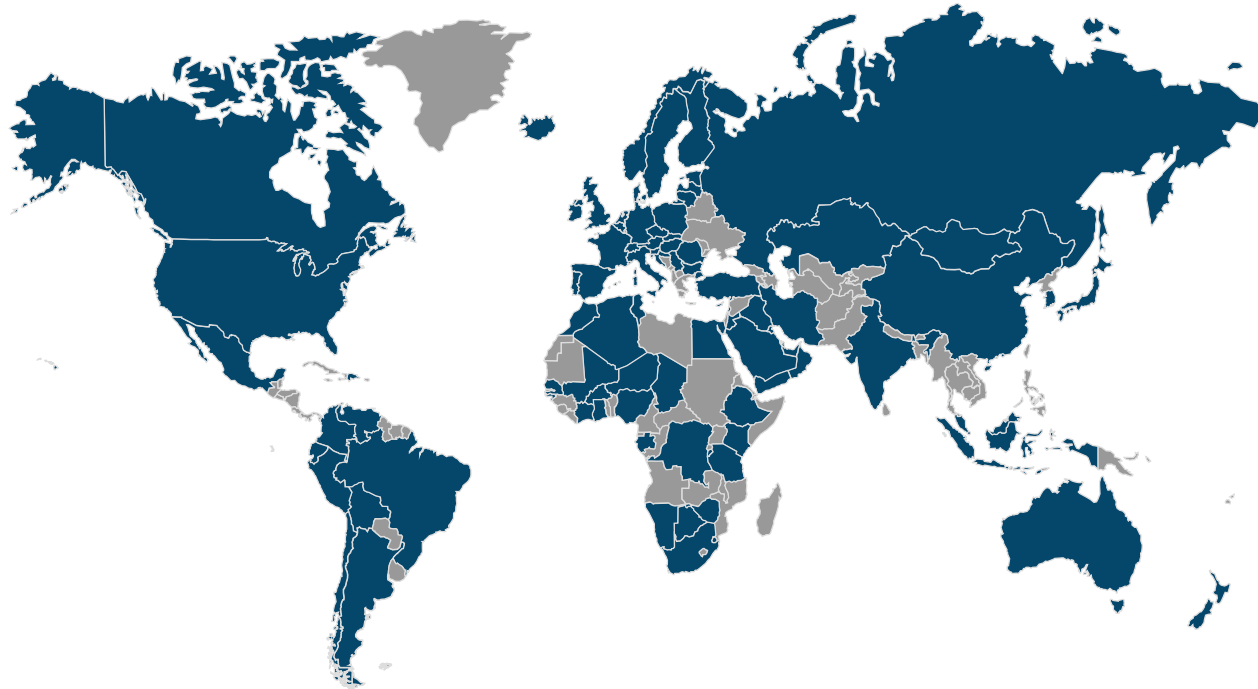


World Energy Issues Monitor 2017 **Exposing the New Energy Realities**

www.worldenergy.org/publications

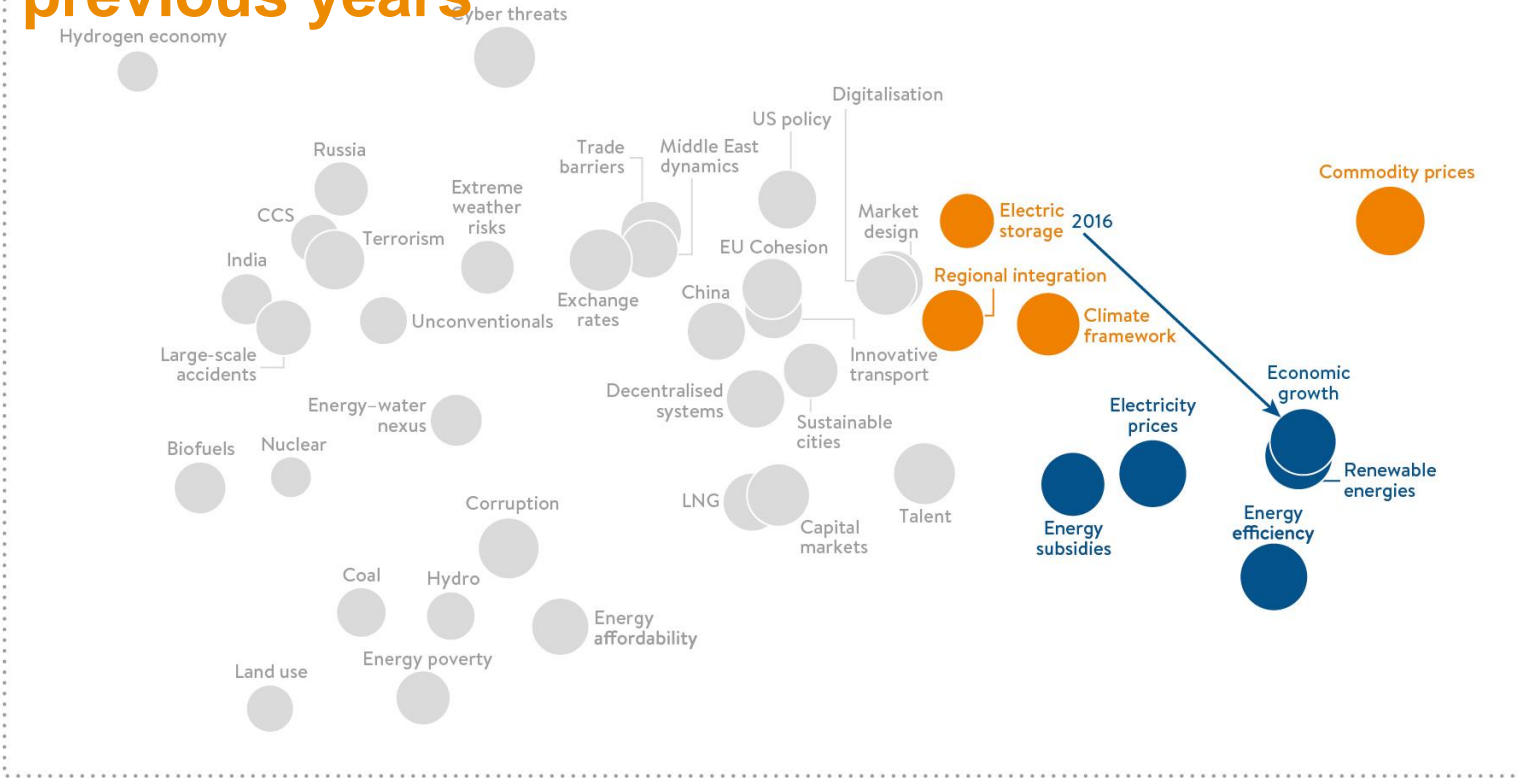
Issues Monitor 2017

Responses in 95 countries



Action Priorities – Largely consistent with previous years

▲
Uncertainty



World Energy Issues Monitor 2017 - Global Map - The Economic Growth New Normal

Impact ▶

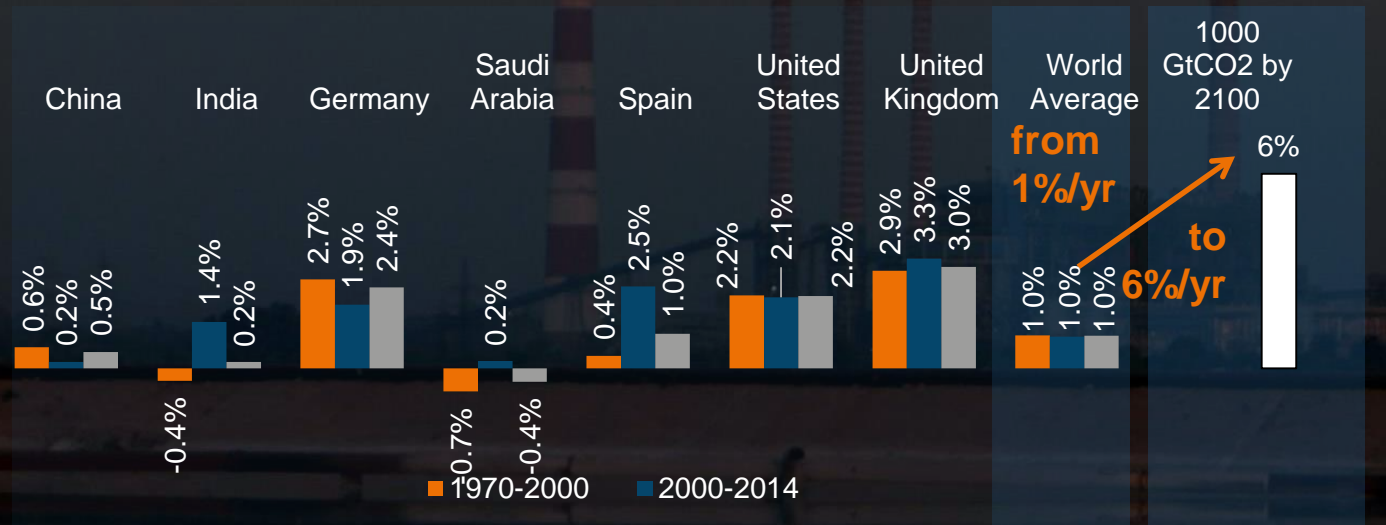
● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work



Carbon Intensity Reduction 1970-2015

% reduction p.a. 1970-2015
Actuals

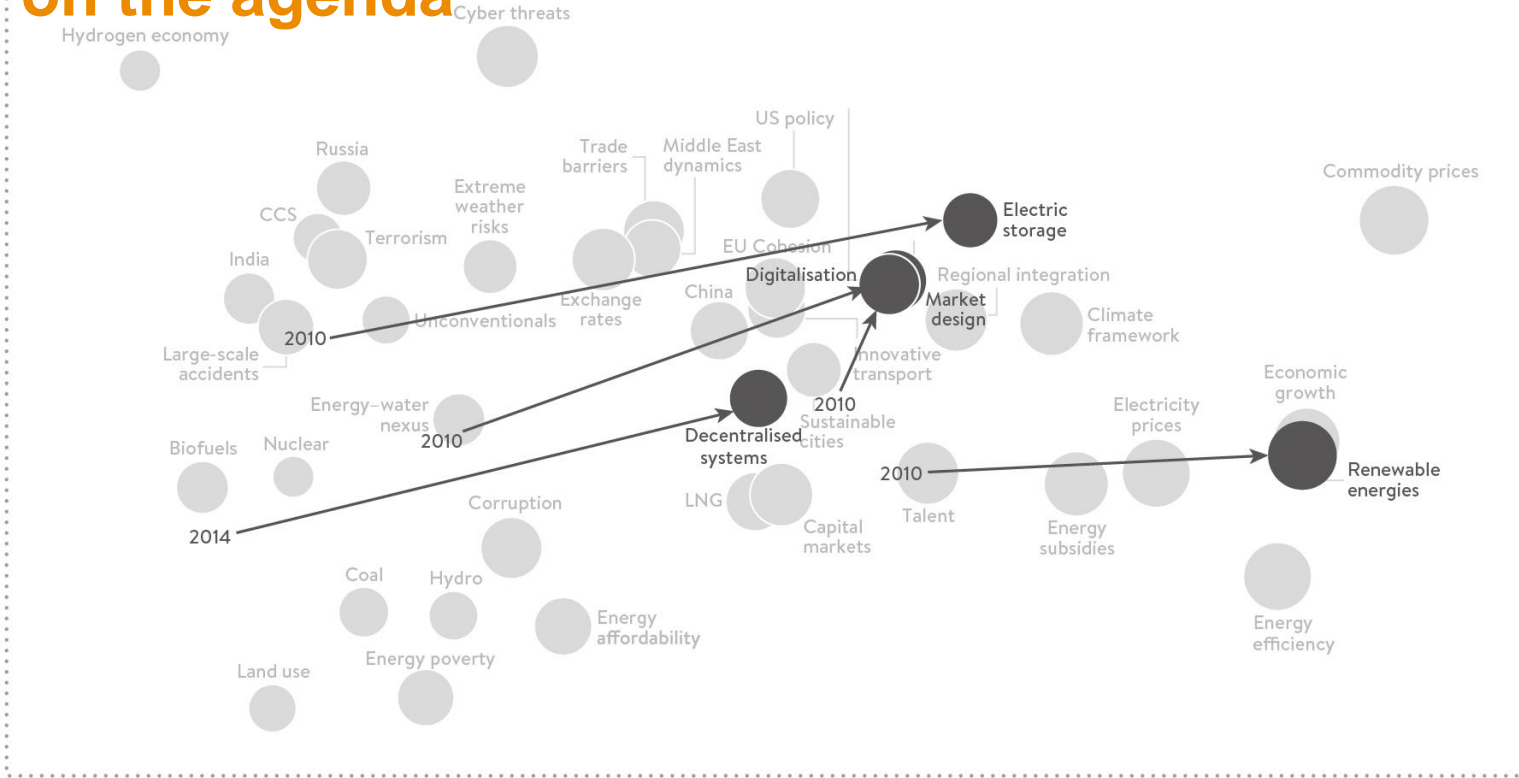


Source: Total Economy Database, BP (2015) Statistical Review, IPCC (2015) "AR5, Synthesis Report";
Note: Positive % changes denote a reduction in CO₂ emissions [Gt] per GDP [USD]

Note: Assumes global GDP growth of 2.6%

The Innovation Cluster continues to move up on the agenda

▲
Uncertainty



World Energy Issues Monitor 2017 - Global Map - The Rise of The Innovation Cluster

Impact ▶

● Timetracking of selected issues from 2010 to 2017

Less urgent ○○○ More urgent

New business models: Rural electrification

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President Street Microgrid Sandbox

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ENERGY
COUNCIL

Potential
Neighbor
Consumers

Solar
Renewable
Producers

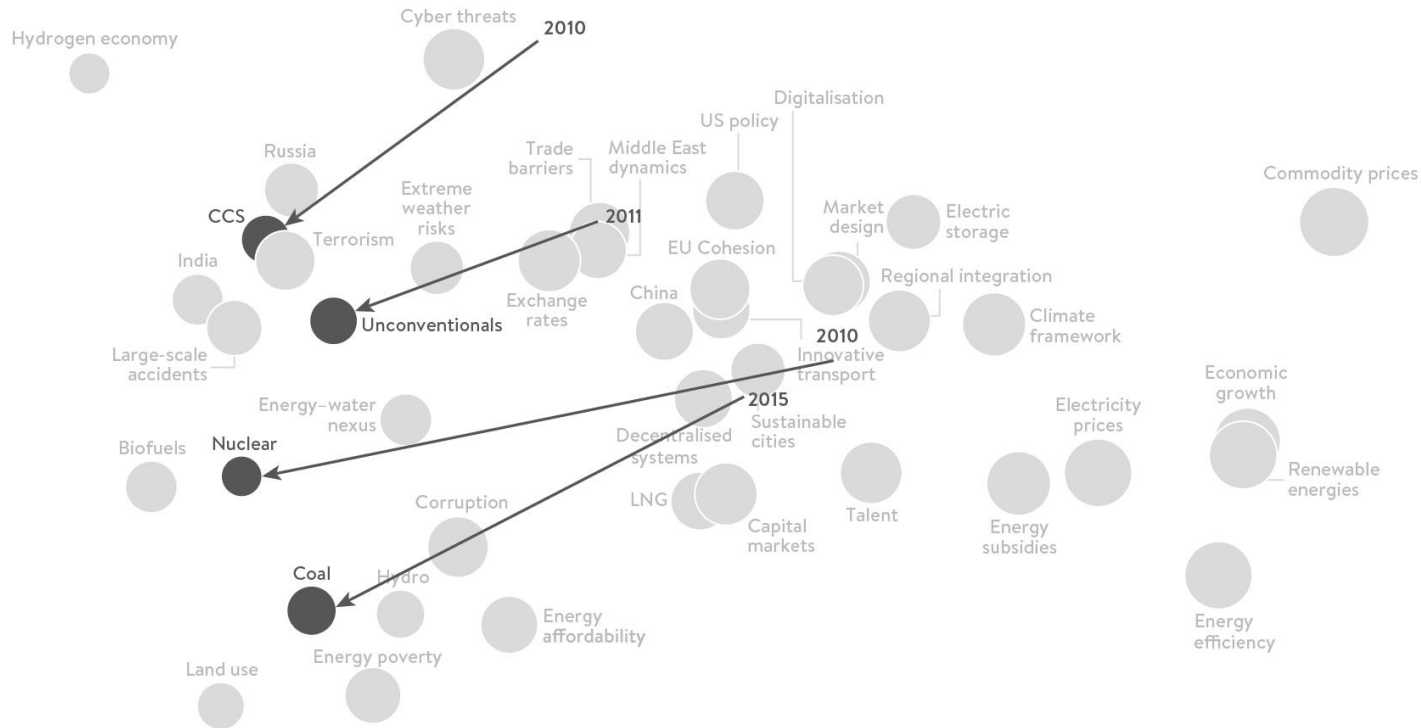


President St
Park Slope,
Brooklyn



Key Issues Cooling Down

Uncertainty ▲



**World Energy Issues Monitor 2017 - Global Map -
CCS, Unconventionals, Nuclear & Coal Cooling Down**

Impact ►

● Timetracking of selected issues from 2010 to 2017

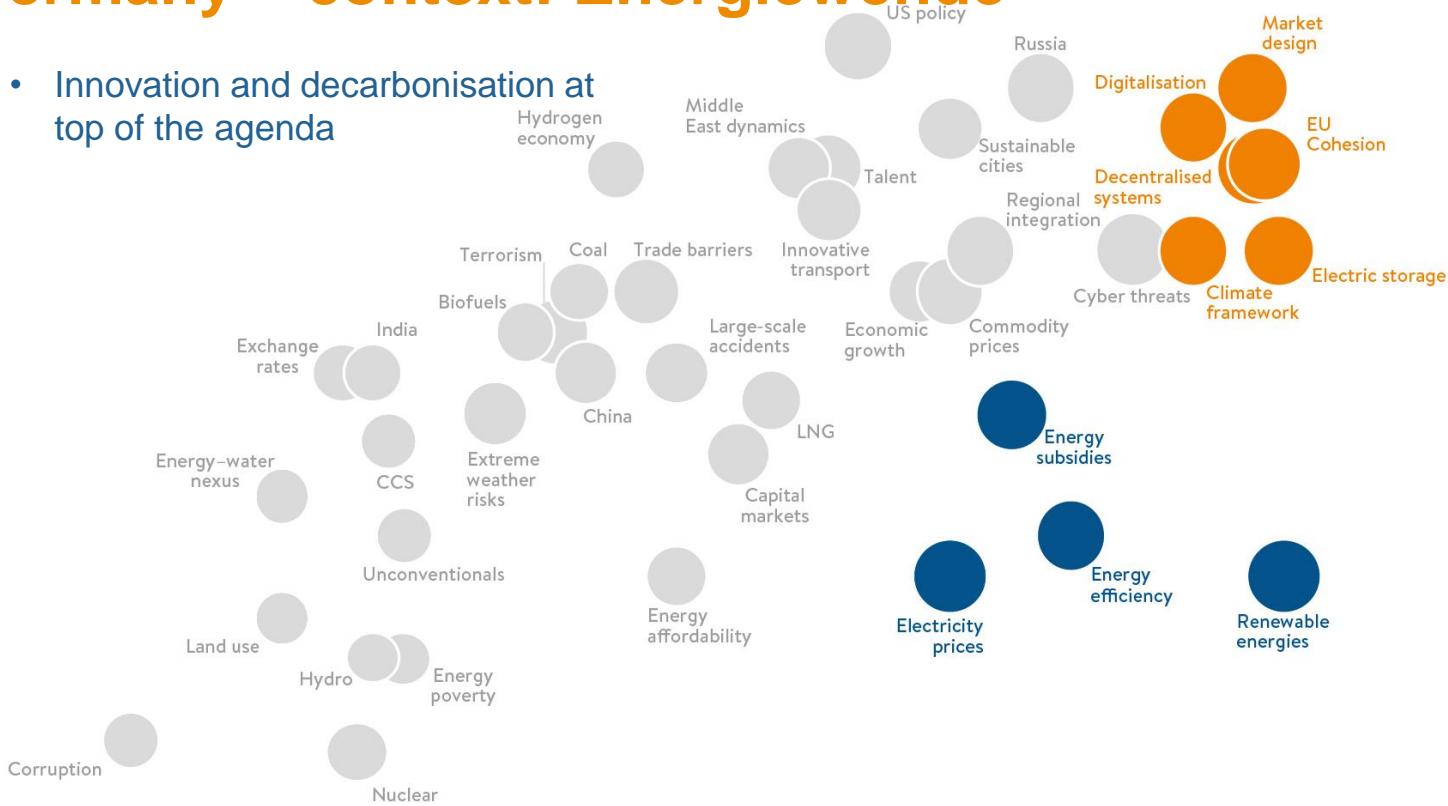
Less urgent ○ ○ ○ More urgent

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Germany – context: Energiewende

▲
Uncertainty

- Innovation and decarbonisation at top of the agenda



World Energy Issues Monitor 2017 - Germany

Impact ▶

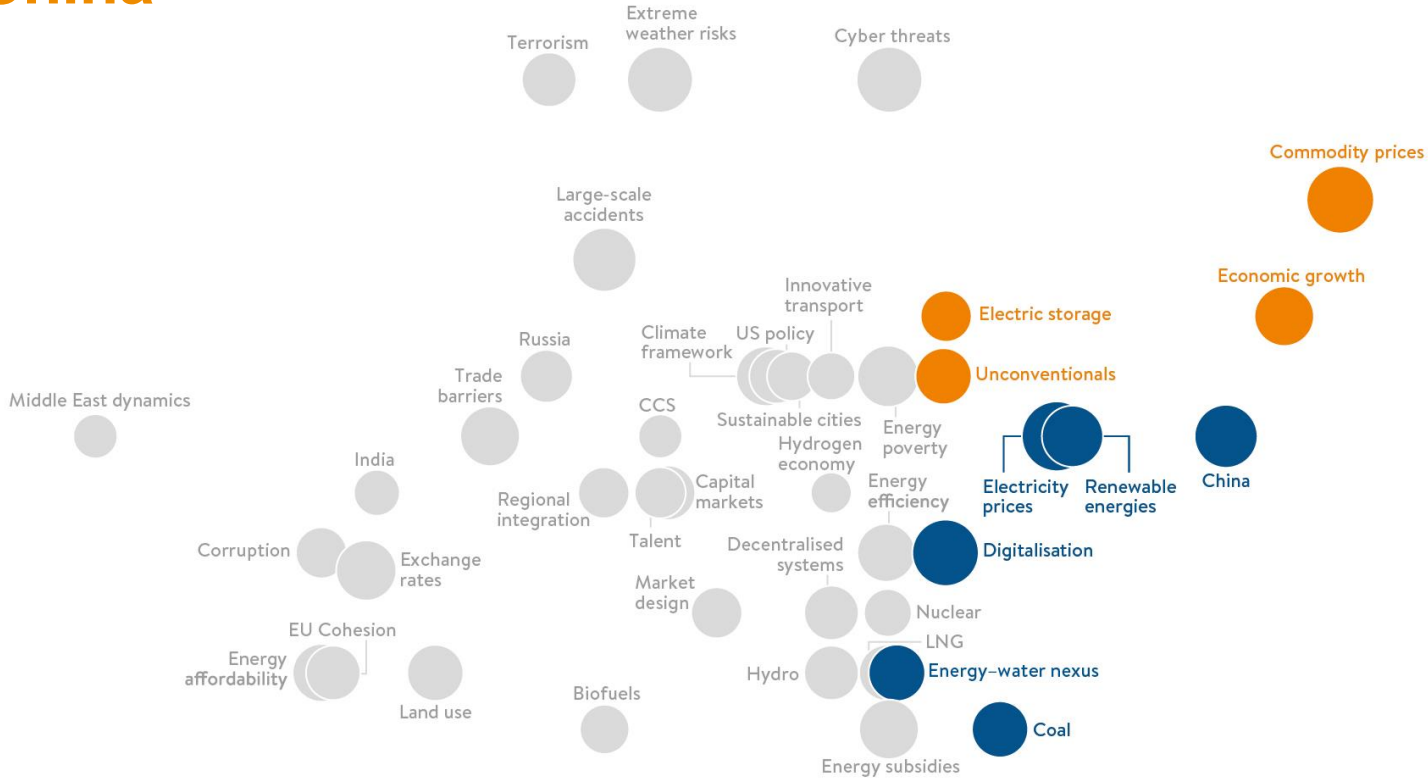
● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work



China

Uncertainty ▲



World Energy Issues Monitor 2017 - China

Impact ►

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



Balancing the 'Energy Trilemma'

Energy Security

The effective management of primary energy supply from domestic and external sources, the reliability of energy infrastructure, and the ability of energy providers to meet current and future demand.

Energy Equity

Accessibility and affordability of energy supply across the population.

Environmental Sustainability

Encompasses the achievement of supply and demand side energy efficiencies and the development of energy supply from renewable and other low-carbon sources.



**ENERGY
SECURITY**

POLICY CHALLENGES FROM DIGITAL- & DECENTRALISATION

- **CYBER SECURITY**
- **SOVEREIGNTY**
- **PRIVACY**
- **PRICE SOLIDARITY**



**ENERGY
EQUITY**



**ENVIRONMENTAL
SUSTAINABILITY**