Energy Connectivity in an Interconnected World
27 October 2014
We are all increasingly connected...

Projected growth of monthly IP traffic by region

One exabyte (EB) corresponds to 1 billion gigabytes (GB)
Strength in diversity – Southeast Asia

**Myanmar**
Abundant hydropower and natural gas resources, their development is vital to reduce poverty and support economic growth.

**Thailand**
Second-largest energy consumer in ASEAN and heavily dependent on energy imports due to limited energy resources; aims to diversify electricity generation.

**Cambodia**
Low levels of electrification, although improving; potential to develop oil and gas resources.

**Singapore**
Strategically situated, it has become Asia’s key oil trading and refining hub (the third-largest in the world) and could become a major gas hub.

**Lao PDR**
Aims to become the hydropower “battery” of Asia; electricity exports have been increasing sharply.

**Vietnam**
Significant renewable and fossil energy resources, but rapidly growing energy demand underlies a shift towards imports; developing a nuclear power programme.

**Philippines**
Fast rising electricity demand requires expanded supplies; strongly reliant on energy imports, though it is the world’s second-largest geothermal producer.

**Malaysia**
Third-largest energy consumer in ASEAN with relatively high per-capita consumption; significant oil and LNG exporter, but production is maturing.

**Brunei Darussalam**
Among the wealthiest countries in the world on a per-capita basis, thanks to oil and LNG exports.

This map is without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.
Building on a new national electricity grid - India

This map is without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.
Global Electricity Generation: a share reversal

- **Generation today:**
  - Fossil fuels: 68%
  - Renewables: 20%

- **Generation 2DS 2050:**
  - Renewables: 65%
  - Fossil fuels: 20%
Going in the wrong direction globally

Unabated coal use in electricity generation is incompatible with 2DS objectives
The challenging shift to gas

Three ASEAN countries are currently the world’s top ten LNG producers (Malaysia 2nd, Indonesia 4th, Brunei 10th)
Trends in energy intensity and GDP per capita
Energy Security

Economic Growth

Environmental Sustainability

Engagement