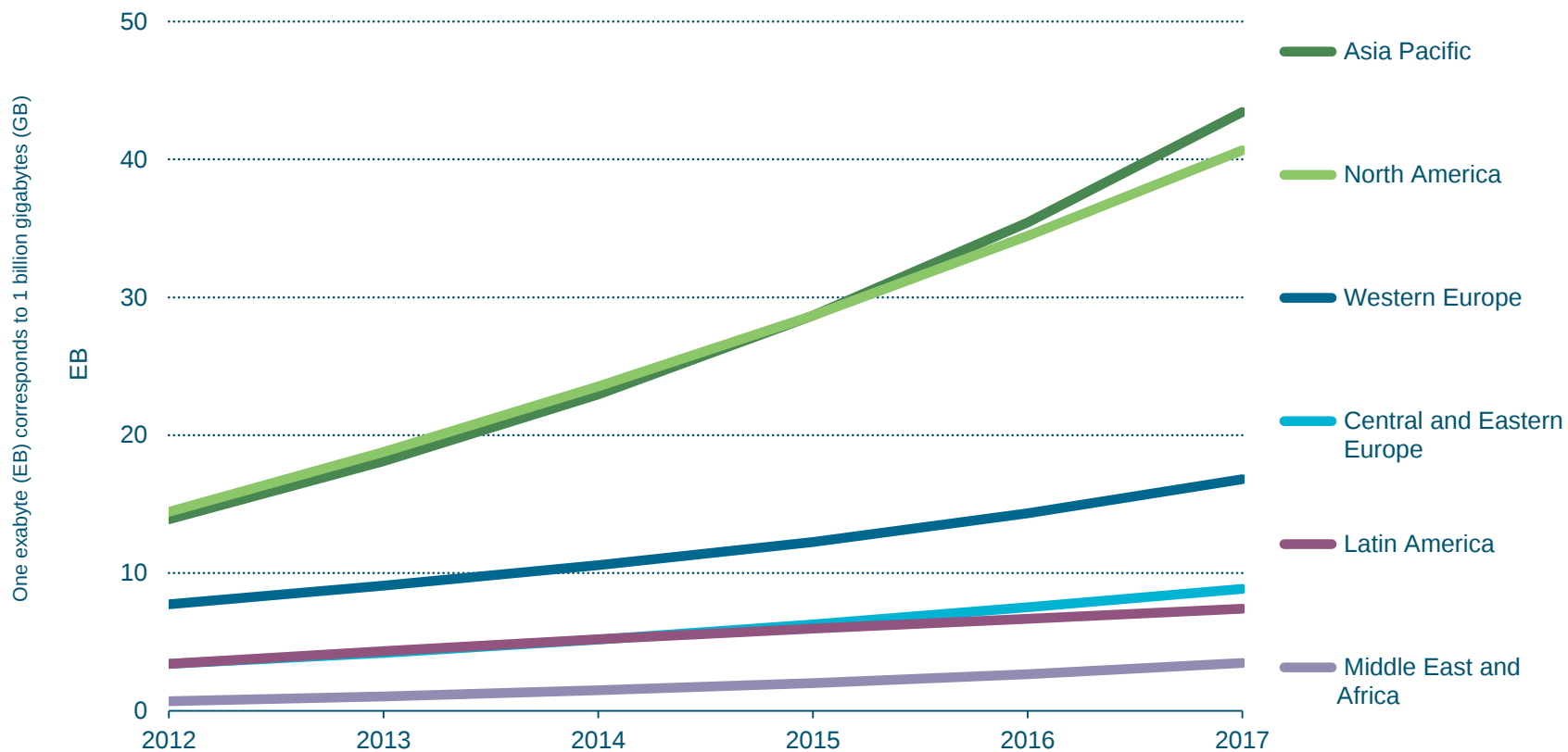


Energy Connectivity in an Interconnected World

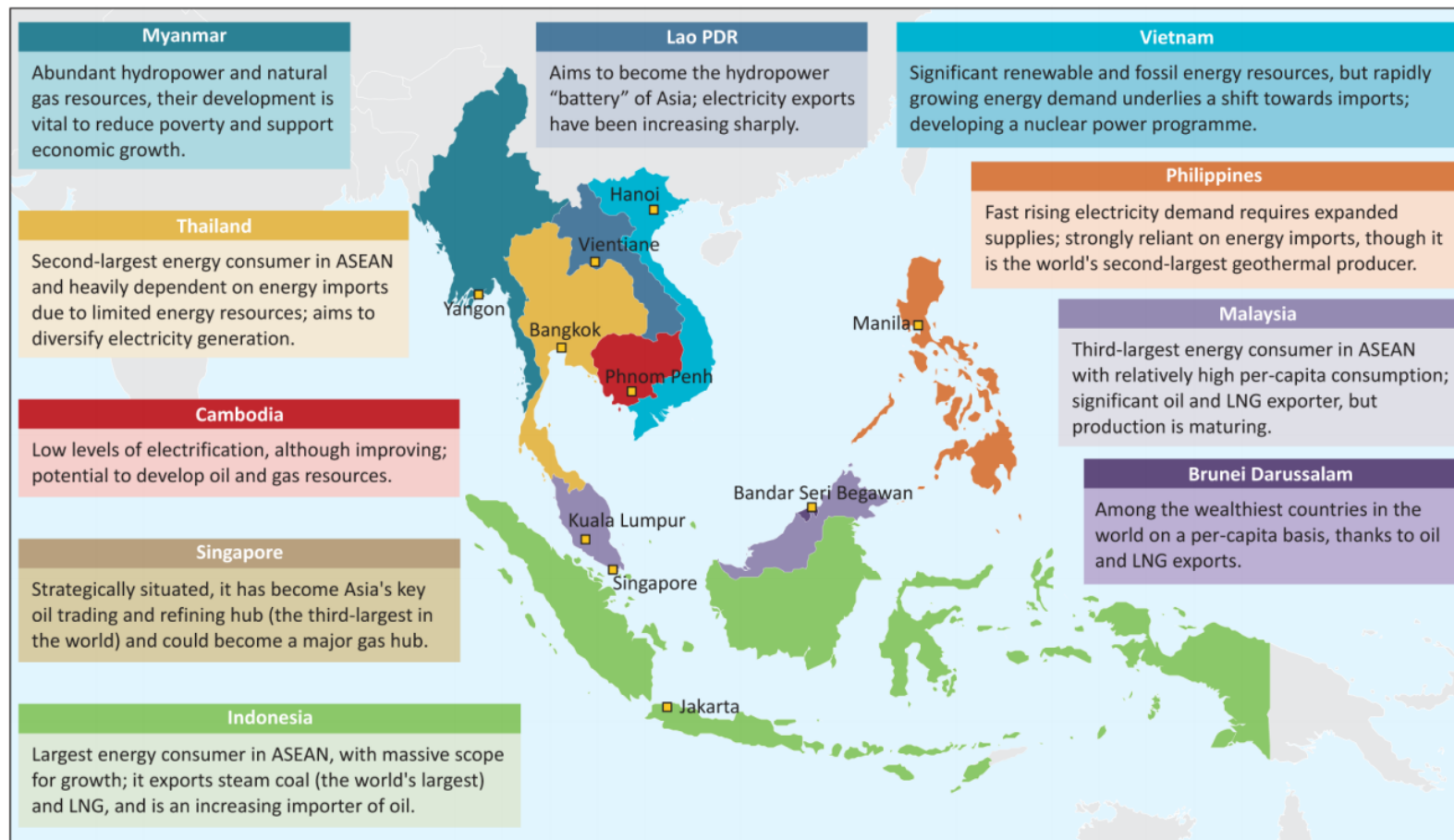
27 October 2014

We are all increasingly connected...

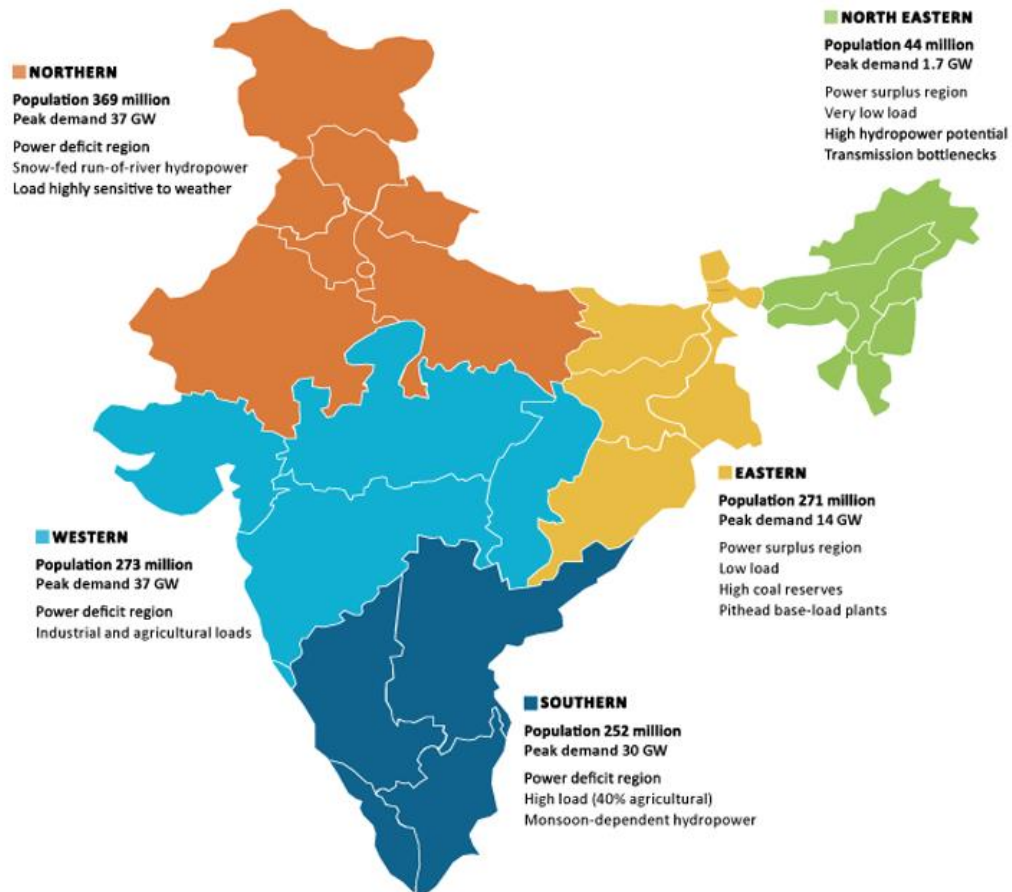
Projected growth of monthly IP traffic by region



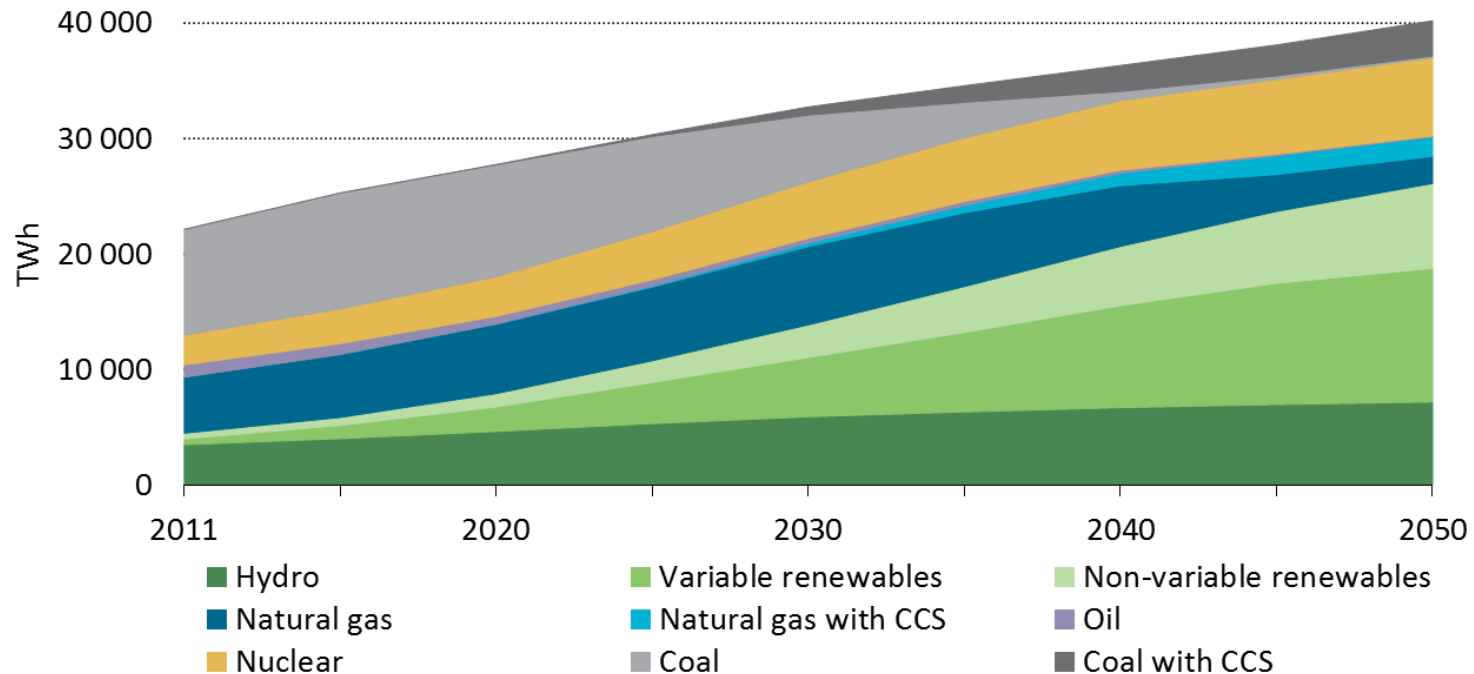
Strength in diversity – Southeast Asia



Building on a new national electricity grid - India



Global Electricity Generation: a share reversal



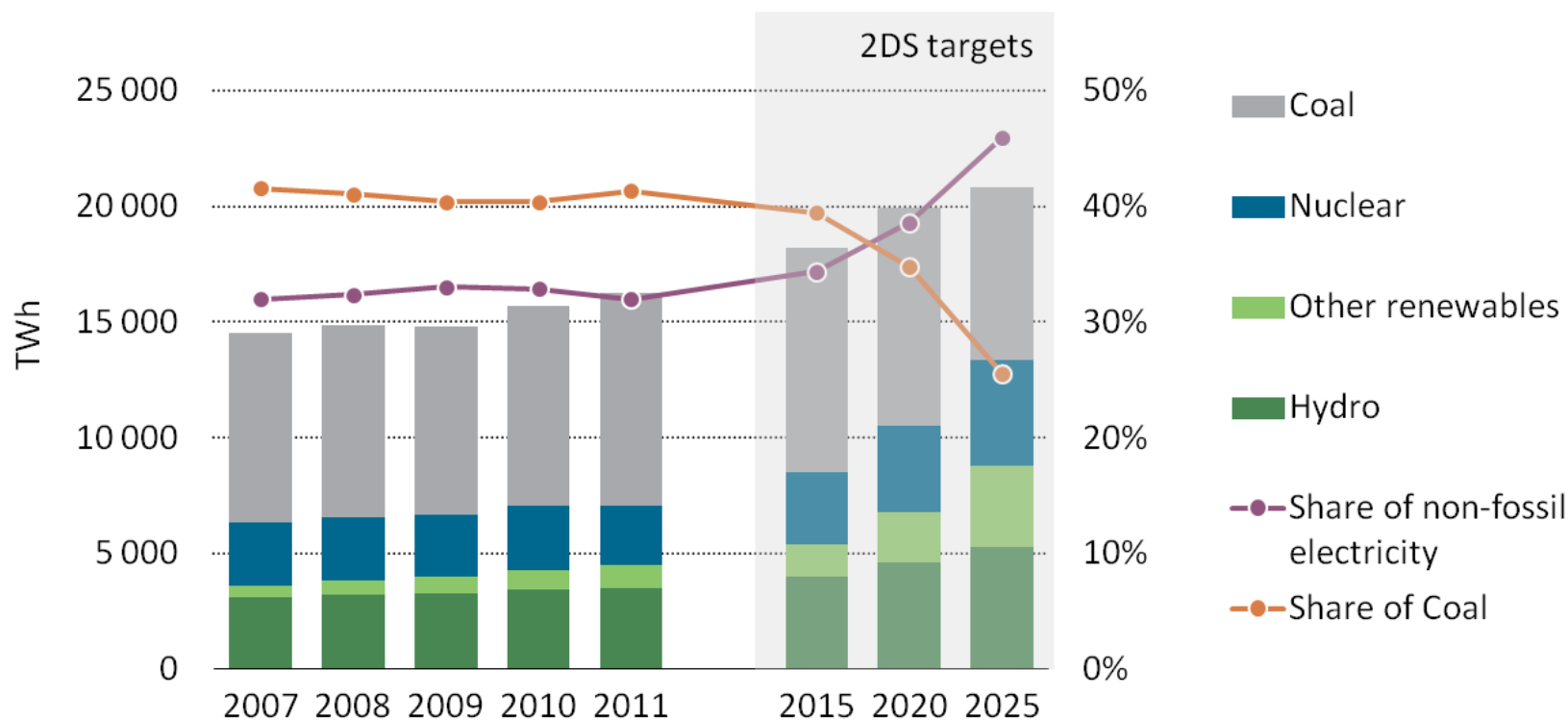
■ Generation today:

- Fossil fuels: 68%
- Renewables: 20%

■ Generation 2DS 2050:

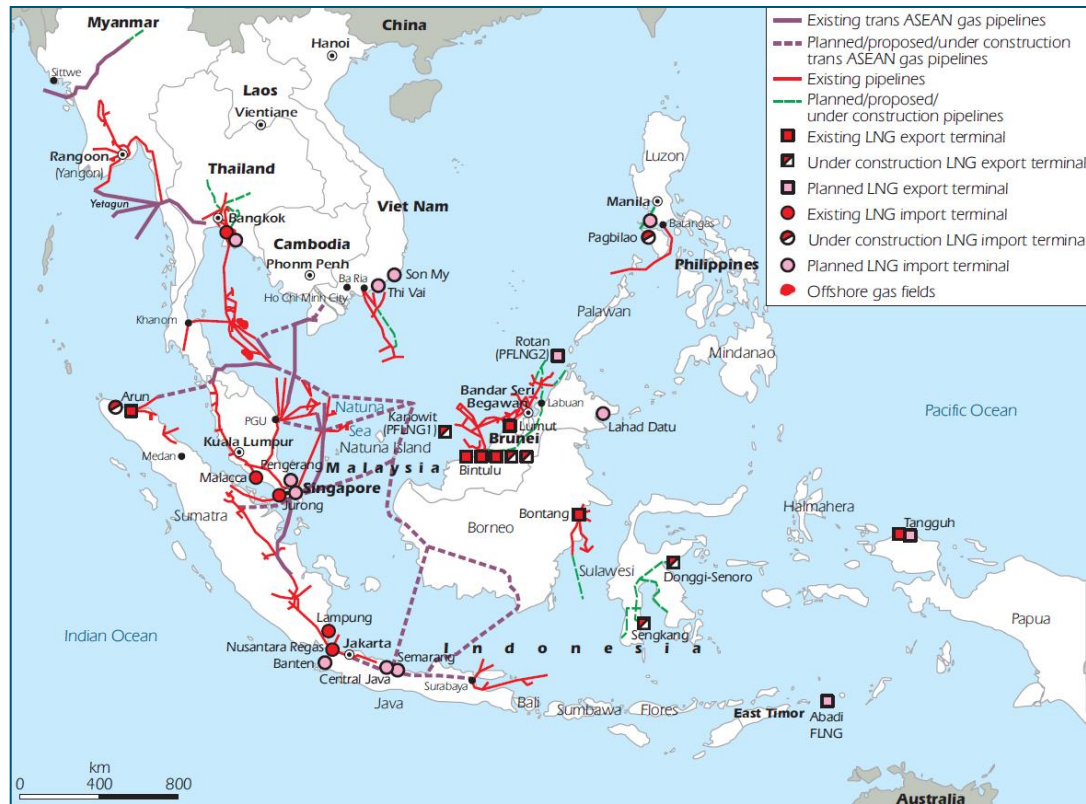
- Renewables: 65%
- Fossil fuels: 20%

Going in the wrong direction globally



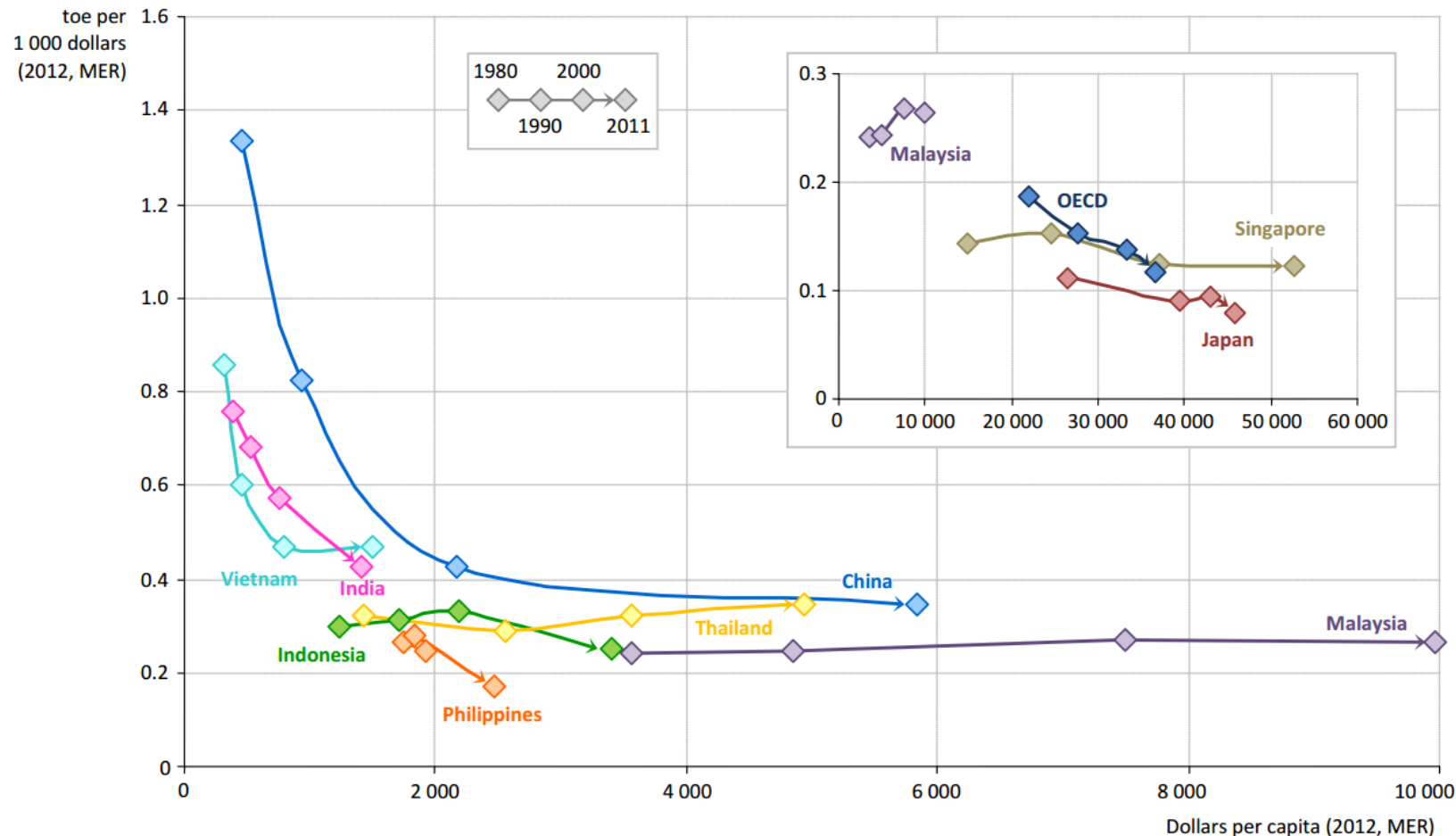
Unabated coal use in electricity generation is incompatible with 2DS objectives

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