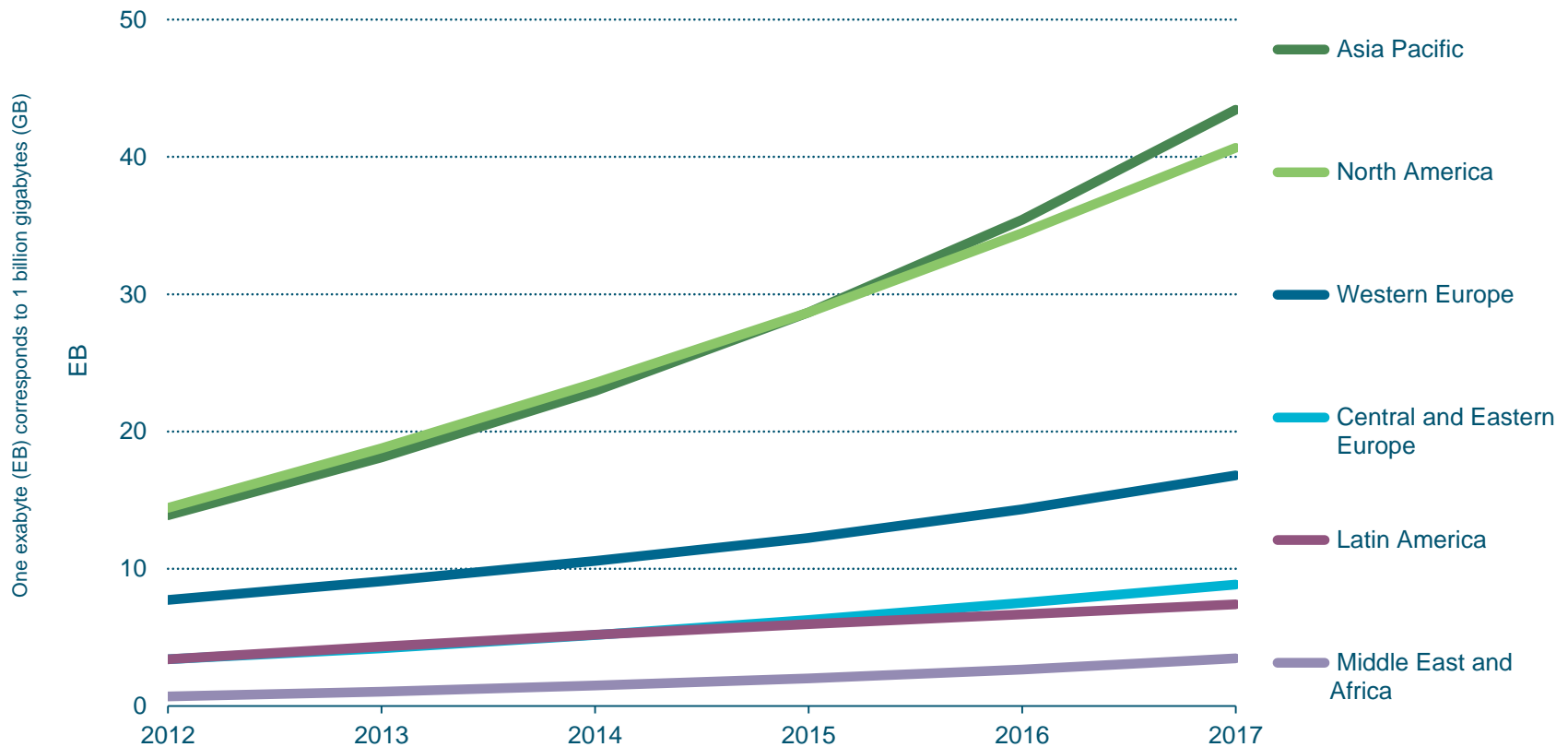


# Energy Connectivity in an Interconnected World

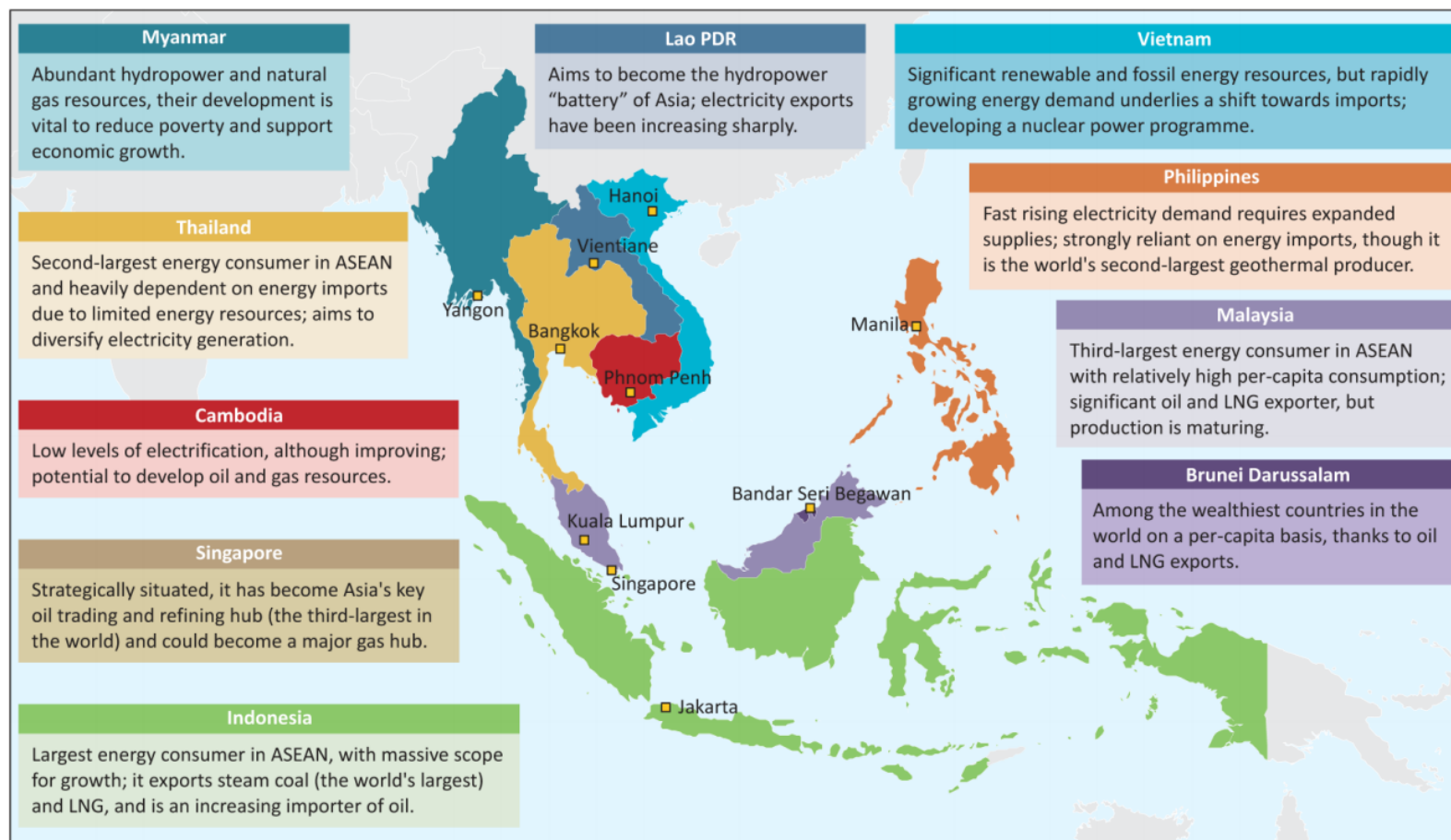
27 October 2014

# We are all increasingly connected...

Projected growth of monthly IP traffic by region

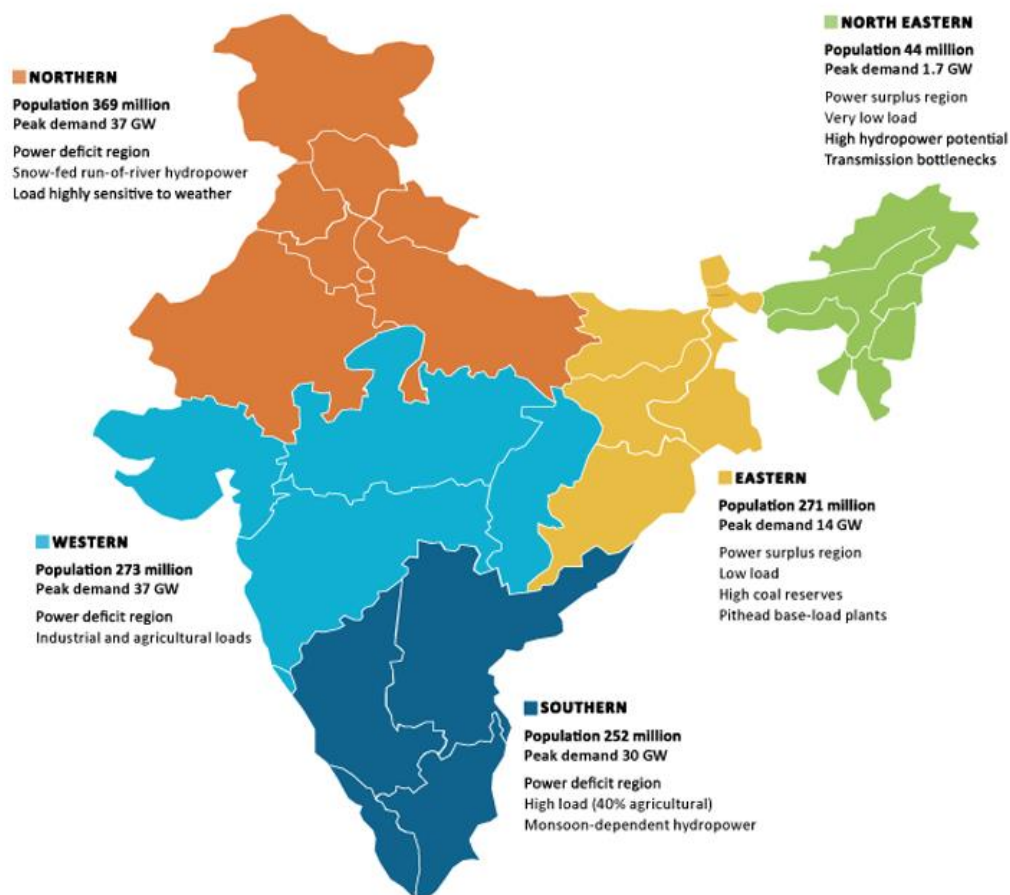


# Strength in diversity – Southeast Asia

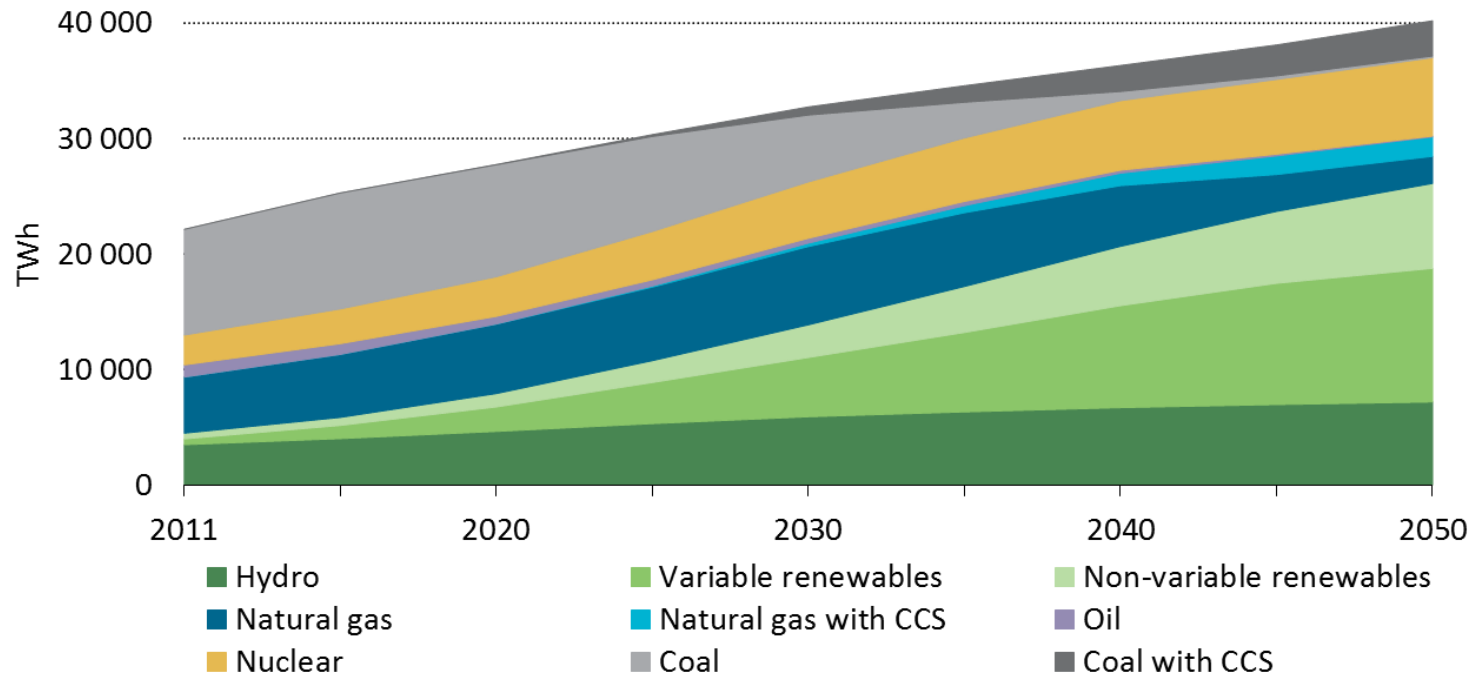




# Building on a new national electricity grid - India



# Global Electricity Generation: a share reversal



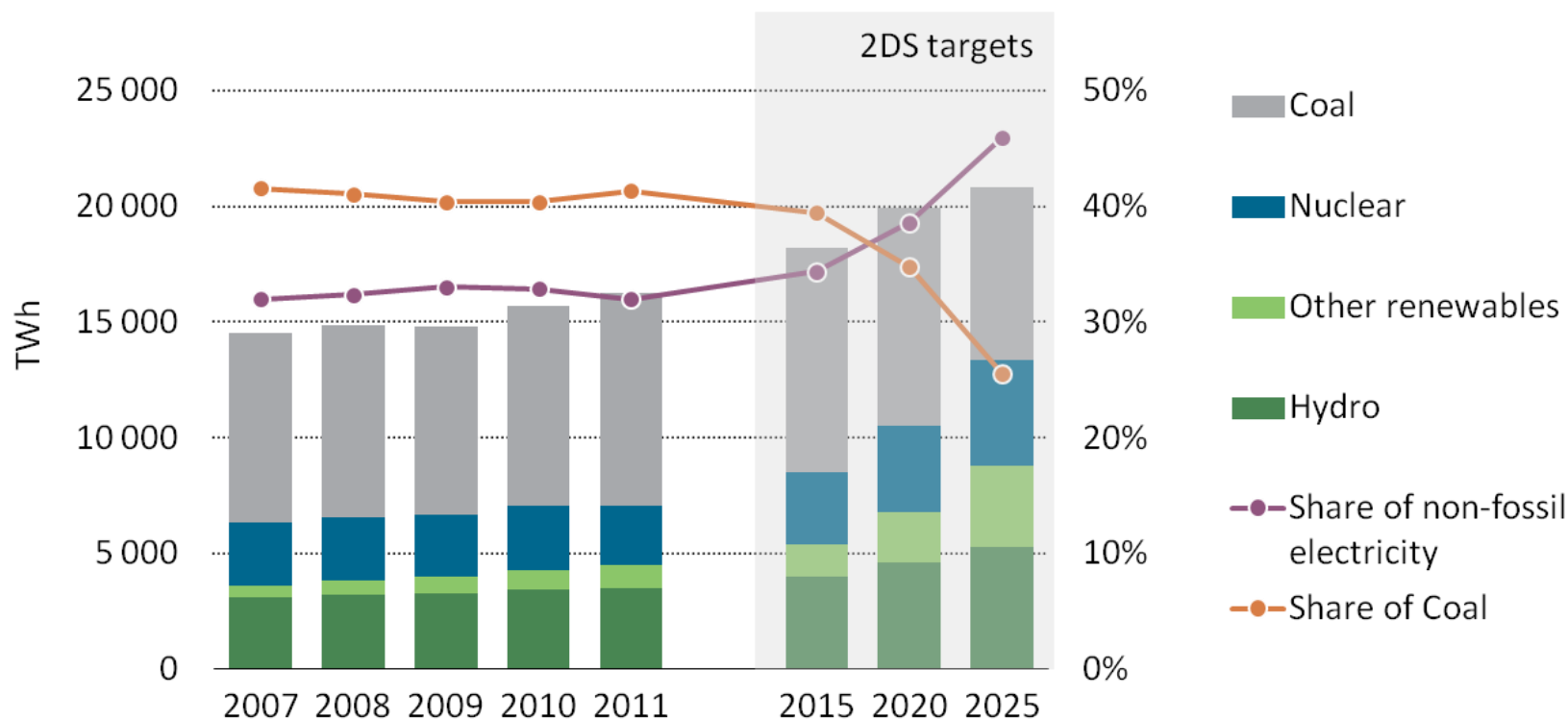
## ■ Generation today:

- Fossil fuels: 68%
- Renewables: 20%

## ■ Generation 2DS 2050:

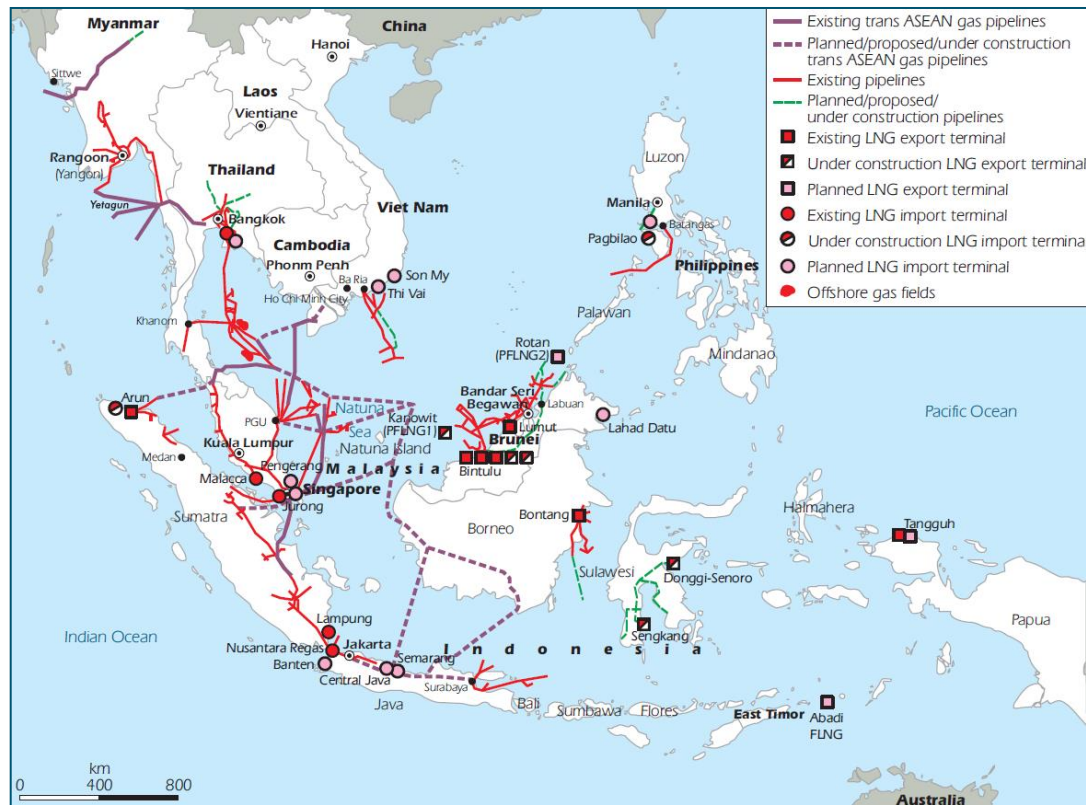
- Renewables: 65%
- Fossil fuels: 20%

# Going in the wrong direction globally



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

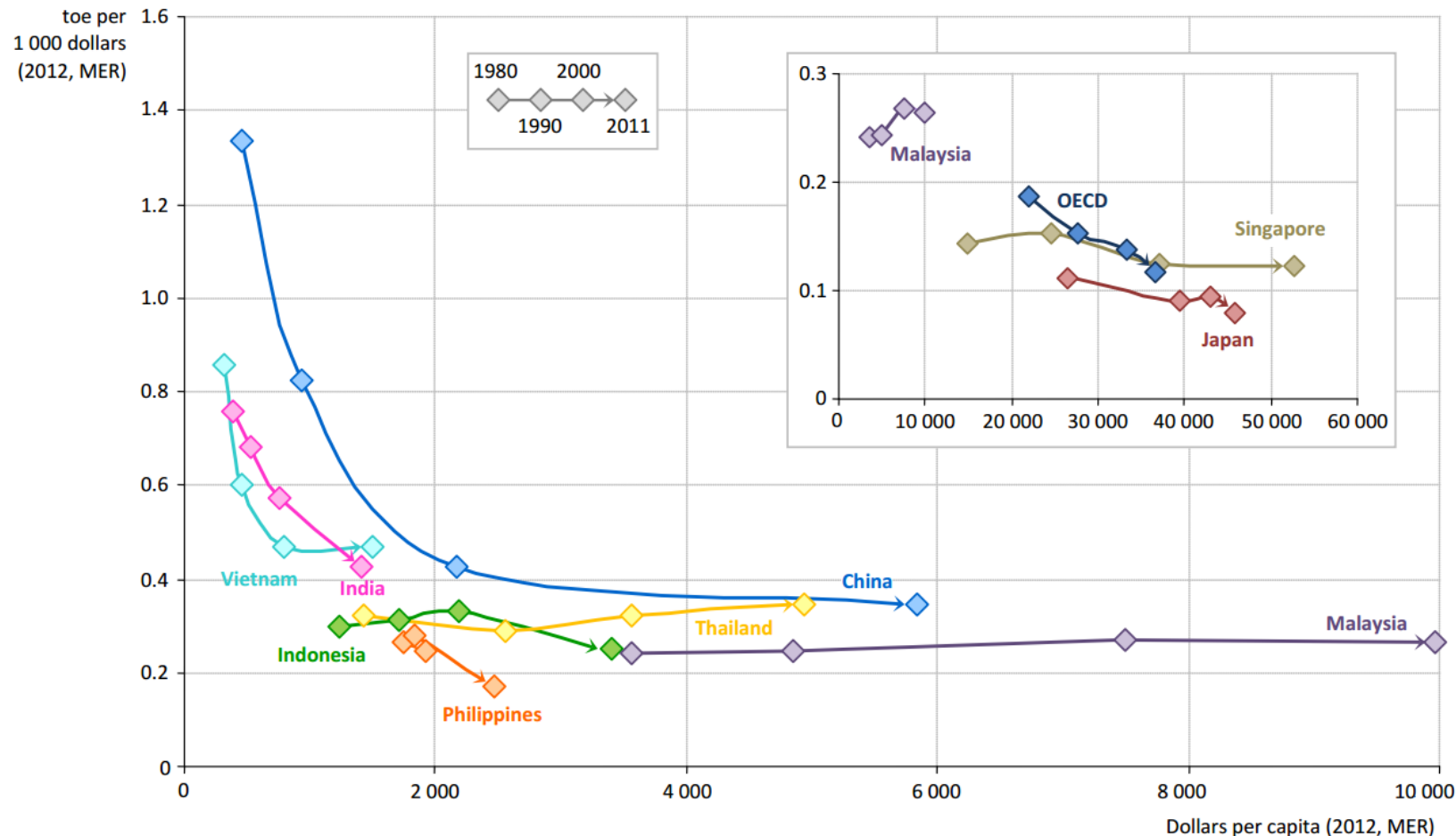
# The challenging shift to gas



*Three ASEAN countries are currently the world's top ten LNG producers (Malaysia 2<sup>nd</sup>, Indonesia 4<sup>th</sup>, Brunei 10<sup>th</sup>)*



# Trends in energy intensity and GDP per capita







**Energy Security**

**Economic Growth**

**Environmental Sustainability**

**Engagement**