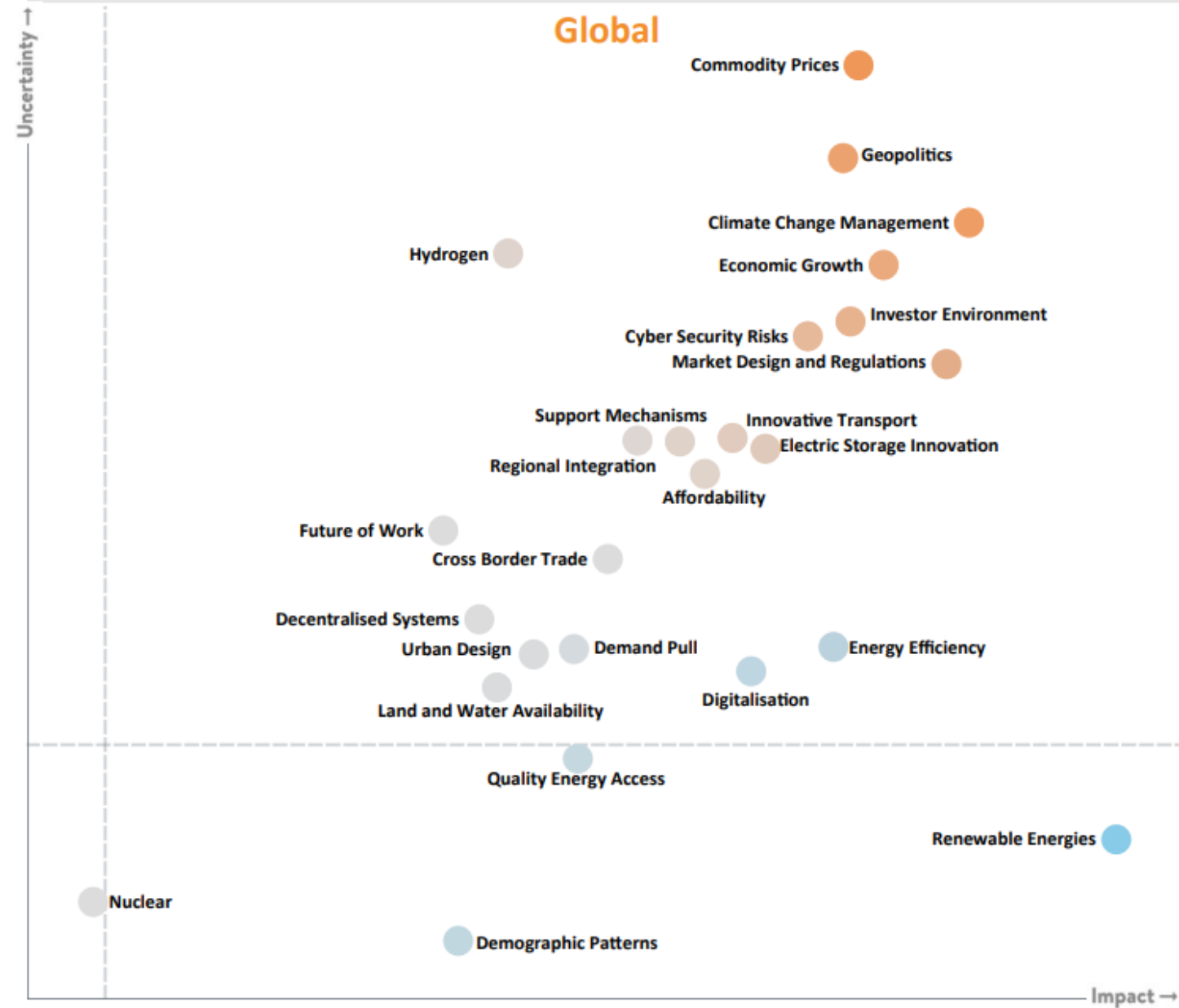




# WORLD ENERGY ISSUES MONITOR



## GLOBAL RESULTS



# Issues Monitor 2022

## Global Map

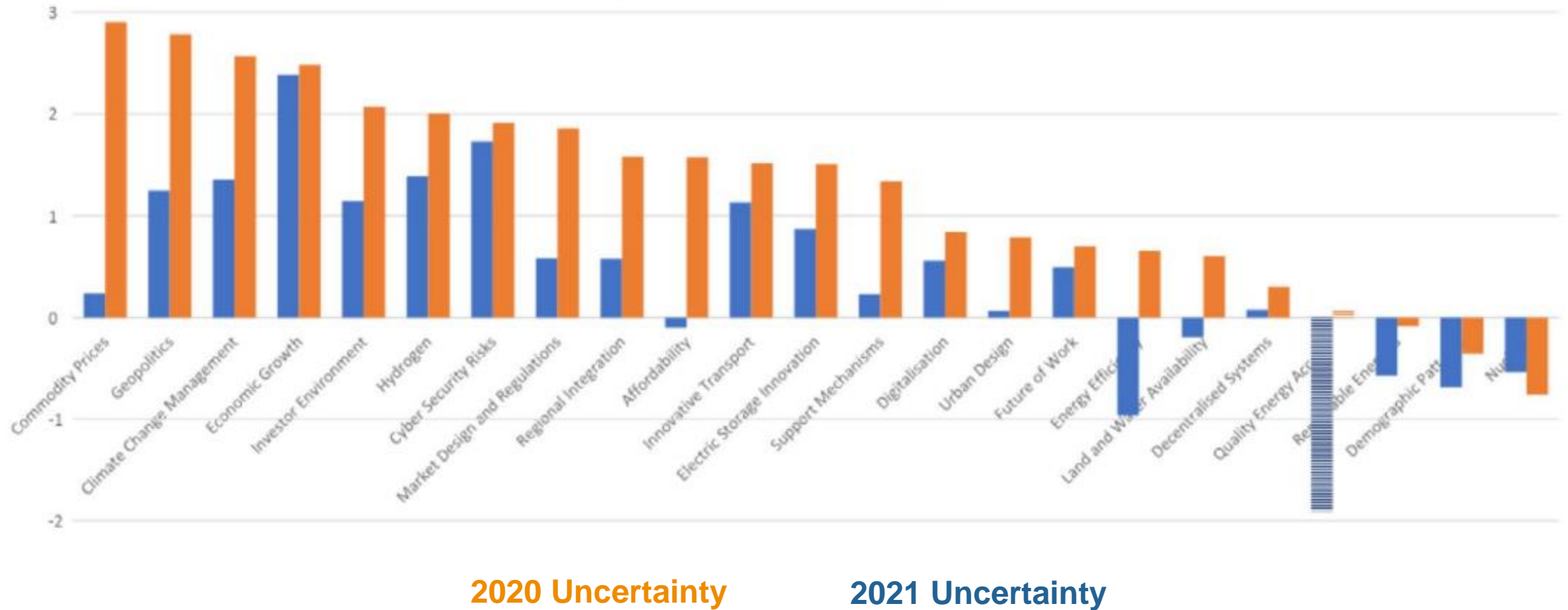
----- Centre-point line

Critical Uncertainties: what keeps energy leaders awake at night

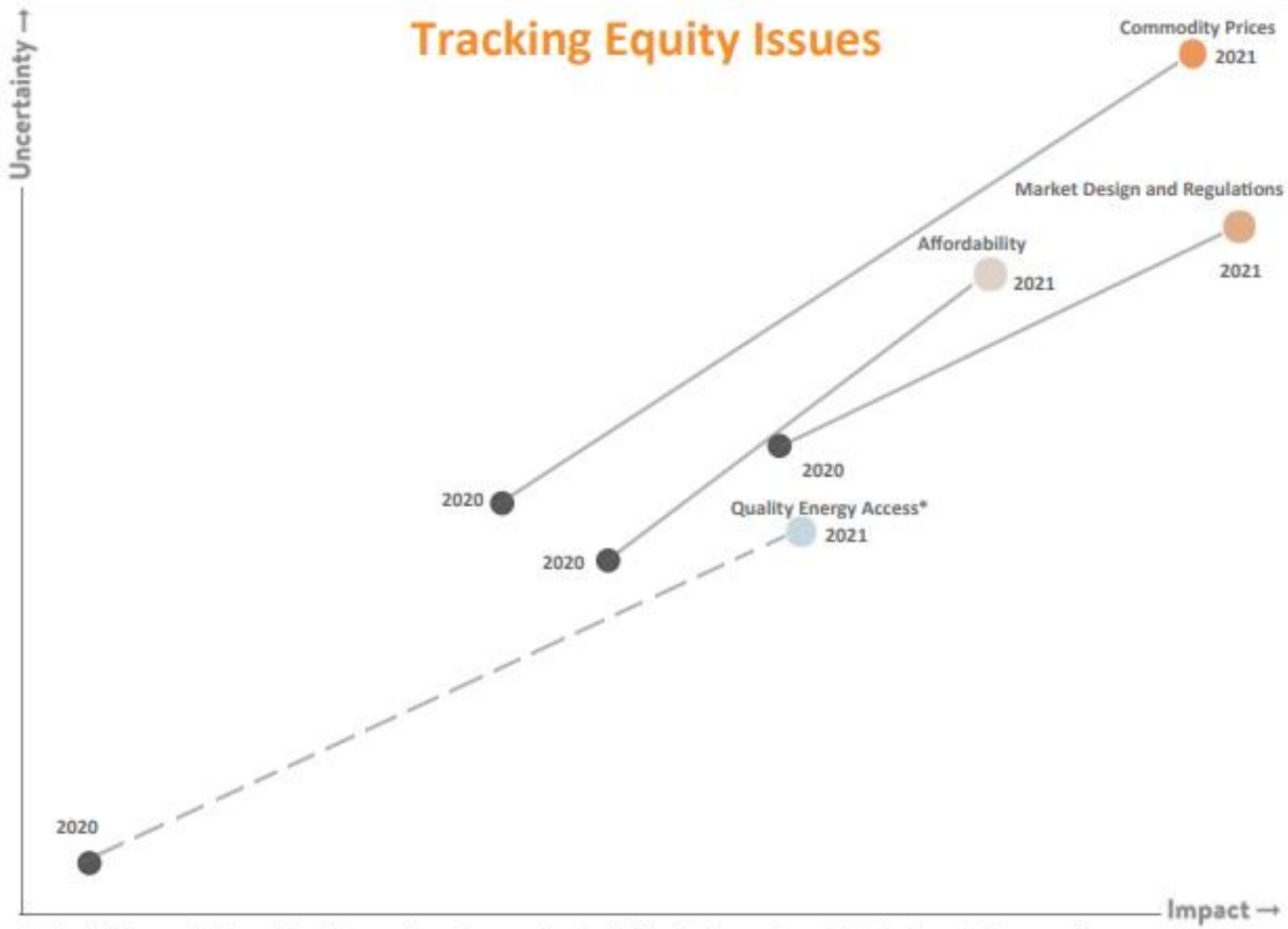
Action Priorities: what keeps energy leaders busy at work



# Uncertainties increase across the board



# Tracking Equity Issues



## Equity-related concerns highlighted

\*In the 2021 survey, the issue "(basic) Energy Access" was replaced with "Quality Energy Access" to include productive uses of energy.

**Critical Uncertainties:** What keeps energy leaders awake at night  
Very Low to Very High

**Action Priorities:** What keeps energy leaders busy at work  
Very Low to Very High



## REGIONAL RESULTS

# CRITICAL UNCERTAINTIES ACROSS REGIONS

(WHAT IS KEEPING ENERGY LEADERS AWAKE AT NIGHT - FROM HIGHEST TO LOWEST SCORES)

## AFRICA



- Commodity Prices
- Economic Growth
- Geopolitics
- Regional Integration
- Climate Change Mngmt

## ASIA



- Commodity Prices
- Climate Change Mngmt
- Geopolitics
- Economic Growth
- Hydrogen

## EUROPE



- Commodity Prices
- Geopolitics
- Climate Change Mngmt
- Market Design
- Investor Environment

## LAC



- Economic Growth
- Commodity Prices
- Climate Change Mngmt
- Investor Environment
- Market Design

## MEGS



- Commodity Prices
- Economic Growth
- Geopolitics
- Climate Change Mngmt
- Innovative Transport

## NORTH AMERICA



- Climate Change Mngmt
- Cyber Security Risks
- Market Design
- Investor Environment
- Affordability

# ACTION PRIORITIES ACROSS REGIONS


(WHAT IS KEEPING ENERGY LEADERS BUSY AT WORK – FROM HIGHEST TO LOWEST SCORES)

**AFRICA**




- Renewable Energies
- Digitalisation
- Demographic Patterns
- Energy Efficiency
- Market Design

**ASIA**




- Renewable Energies
- Digitalisation
- Demographic Patterns
- Quality Energy Access
- Demand Pull

**EUROPE**




- Renewable Energies
- Digitalisation
- Energy Efficiency
- Demographic Patterns
- Quality Energy Access

**LAC**




- Renewable Energies
- Energy Efficiency
- Demand Pull
- Urban Design
- Quality Energy Access

**MEGS**



- Renewable Energies
- Energy Efficiency
- Demographic Patterns
- Land & Water Availability
- Quality Energy Access

**NORTH AMERICA**



- Renewable Energies
- Demographic Patterns
- Energy Efficiency
- Quality Energy Access
- Digitalisation





NEW ZEALAND

# What are your critical uncertainties and action priorities?



## Critical Uncertainties

- Climate Change Management
- Market Design and Regulations
- Cyber Security Risks
- Electric Storage Innovation
- Innovative Transport

## Action Priorities

- Renewable Energy
- Energy Efficiency
- Demographic Patterns
- Electric Storage Innovation
- Quality Energy Access

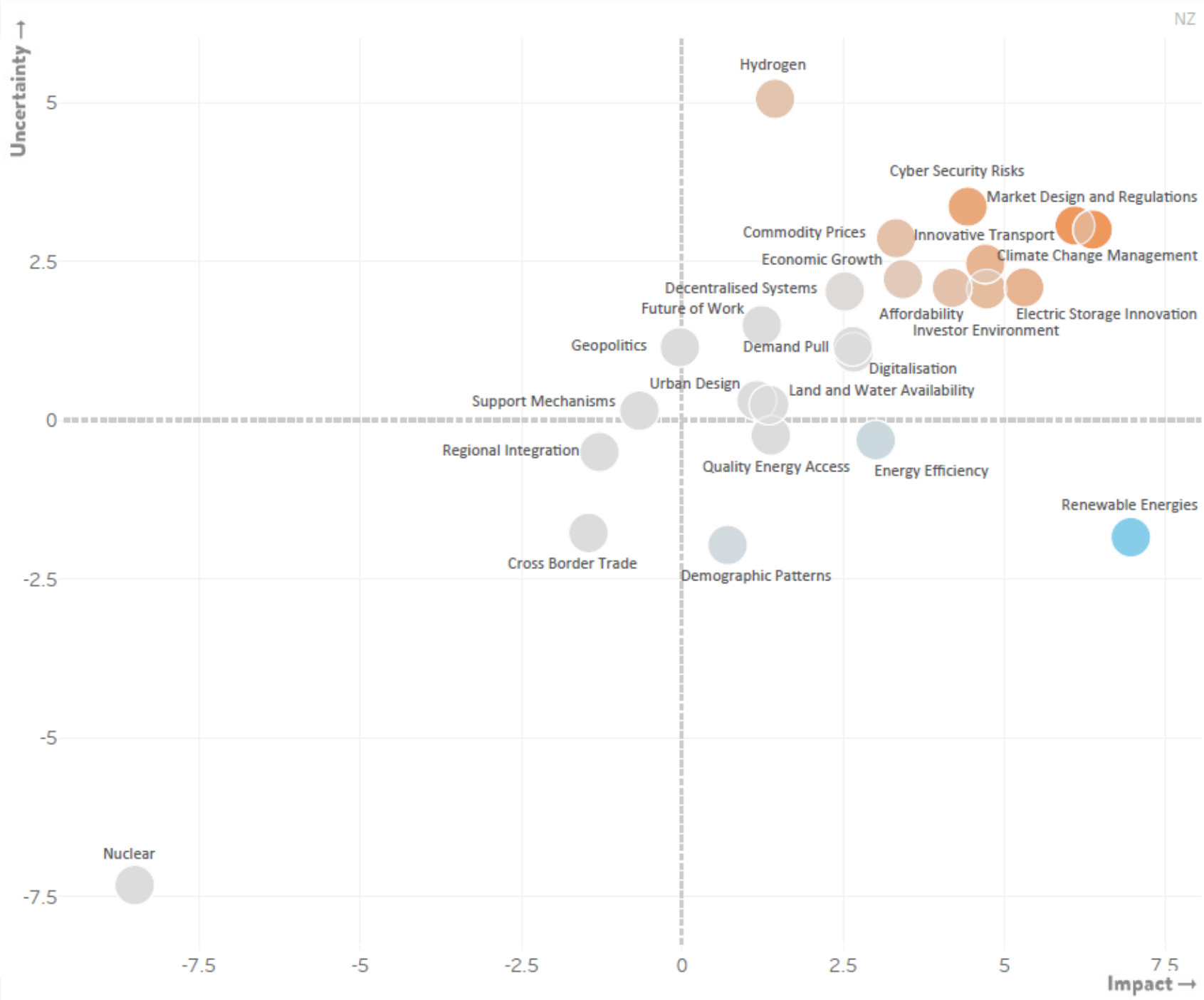
### 2021

#### Critical Uncertainties

- Economic Trends
- Cyber Security Risks
- Energy Storage Innovation
- Carbon Abatement

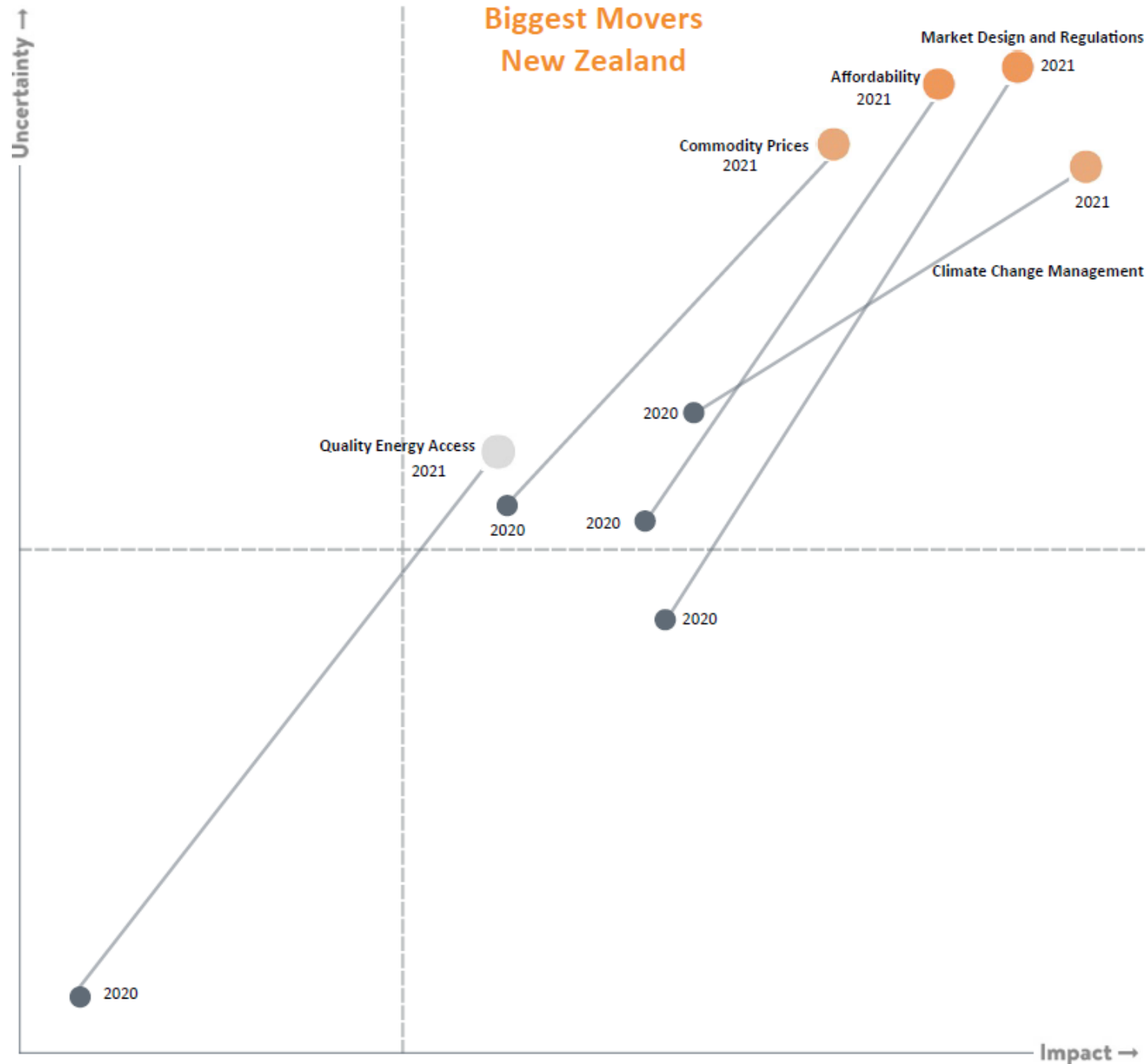
#### Action Priorities

- Energy Efficiency
- Renewable Energy
- Market Design
- Affordability



## New Zealand Energy Issues Monitor

- Climate change provides the imperative to act on energy efficiency and renewable energy
- Getting market design right will be critical to identify and implement the best opportunities to decarbonise first
- We must ensure the system remains affordable. Energy leaders should keep access and affordability top of mind
- The transport sector has the potential to be transformed, not just by new technologies but also new business models

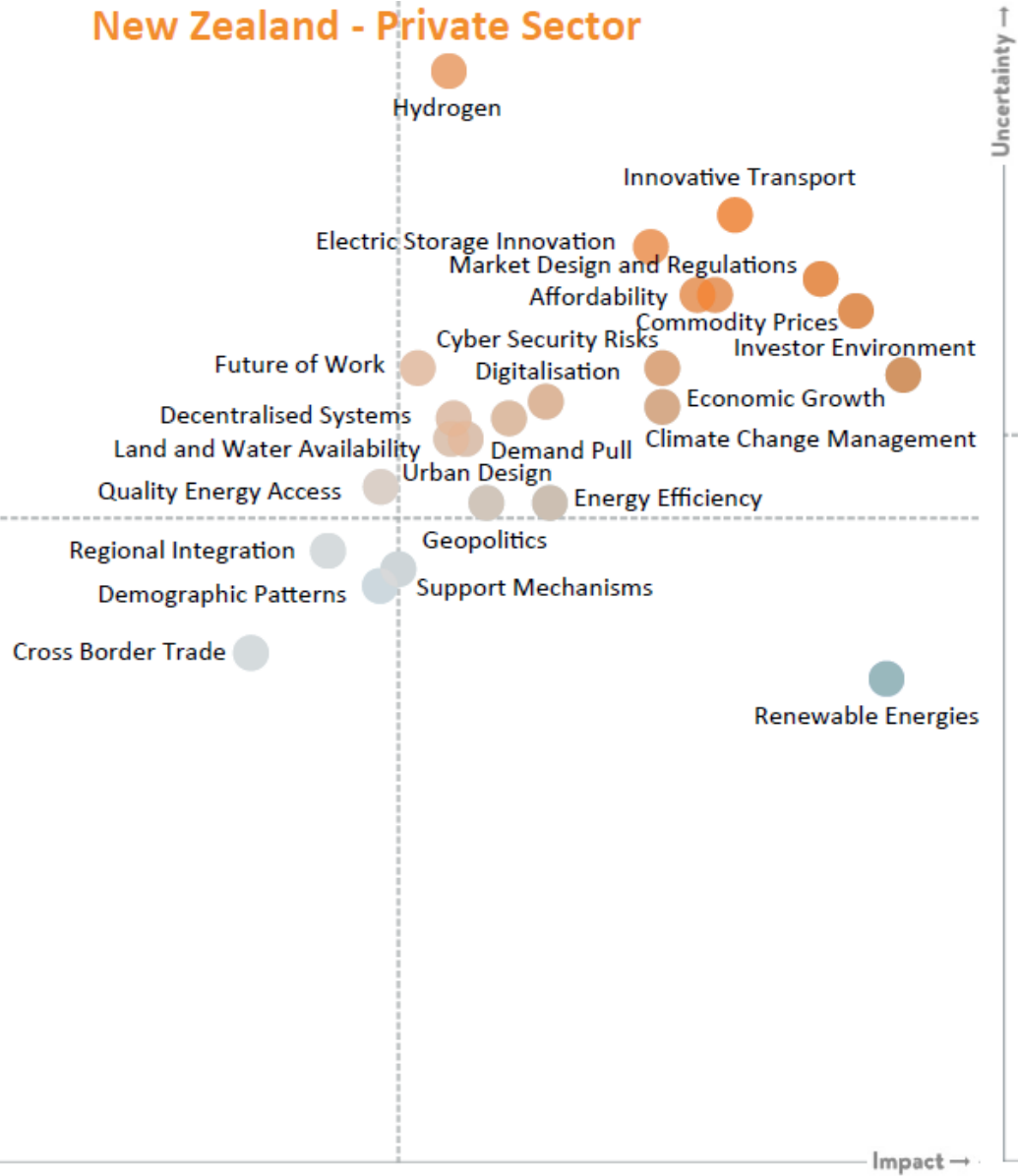


## New Zealand Energy Issues Monitor – Biggest movers

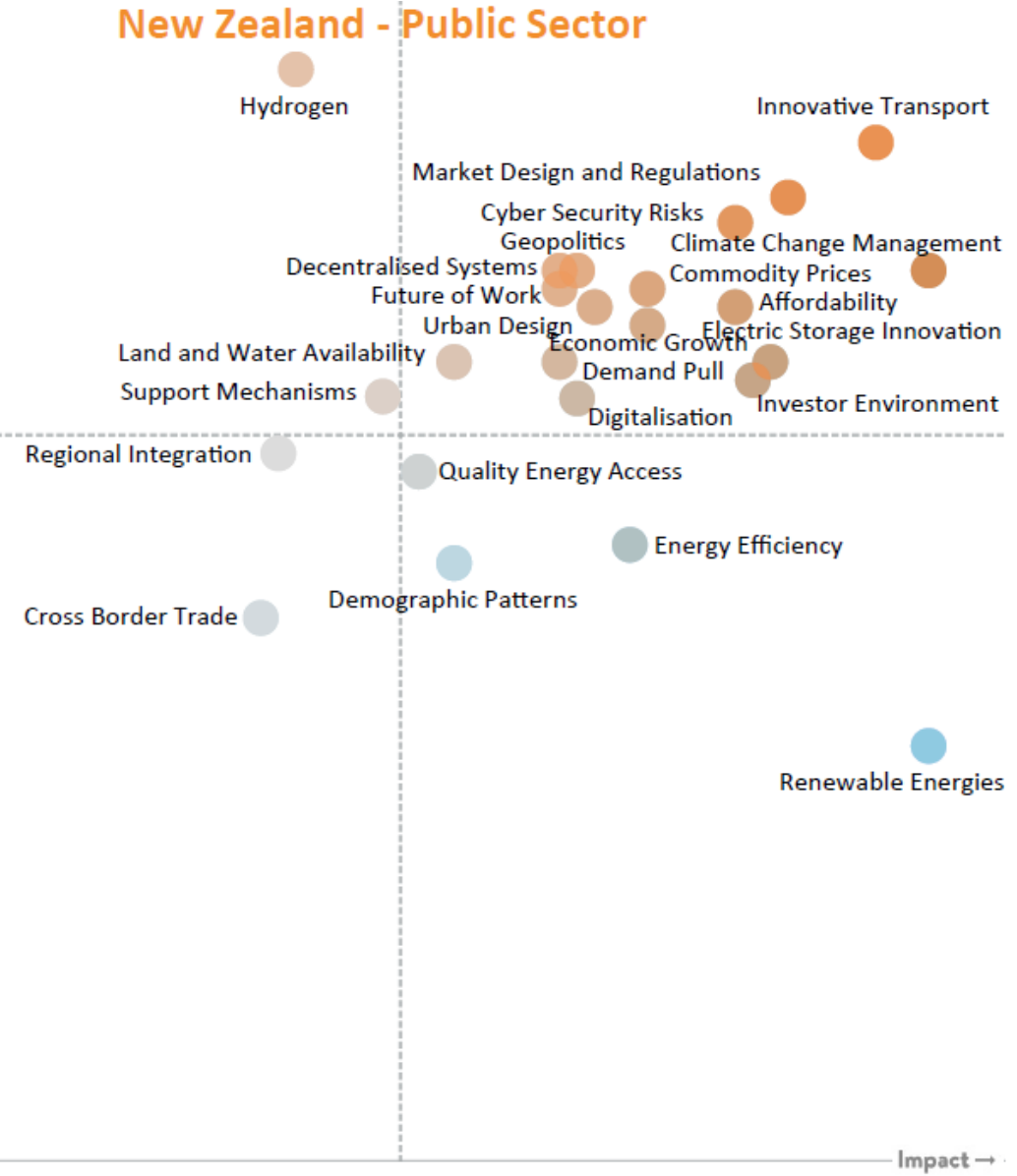
- Climate change management a key focus as sector awaits Government's Emission Reduction Plans
- Policies likely to result in changes to regulations and market design, increasing uncertainty
- Last winter was a reminder of the importance of energy security with lower hydro generation and tight gas supply. With high prices in the Northern Hemisphere this winter, affordability remains front of mind.

\*In the 2021 survey, the issue "(basic) Energy Access" was replaced with "Quality Energy Access" to include productive uses of energy

## New Zealand - Private Sector



## New Zealand - Public Sector



keeps energy leaders awake at night

Action Priorities: what keeps energy leaders busy at work

Centre-point line

Critical Uncertainties: what keeps energy leaders awake at night

Action Priorities: what keeps energy leaders busy at work

Very High

Very Low

Very High

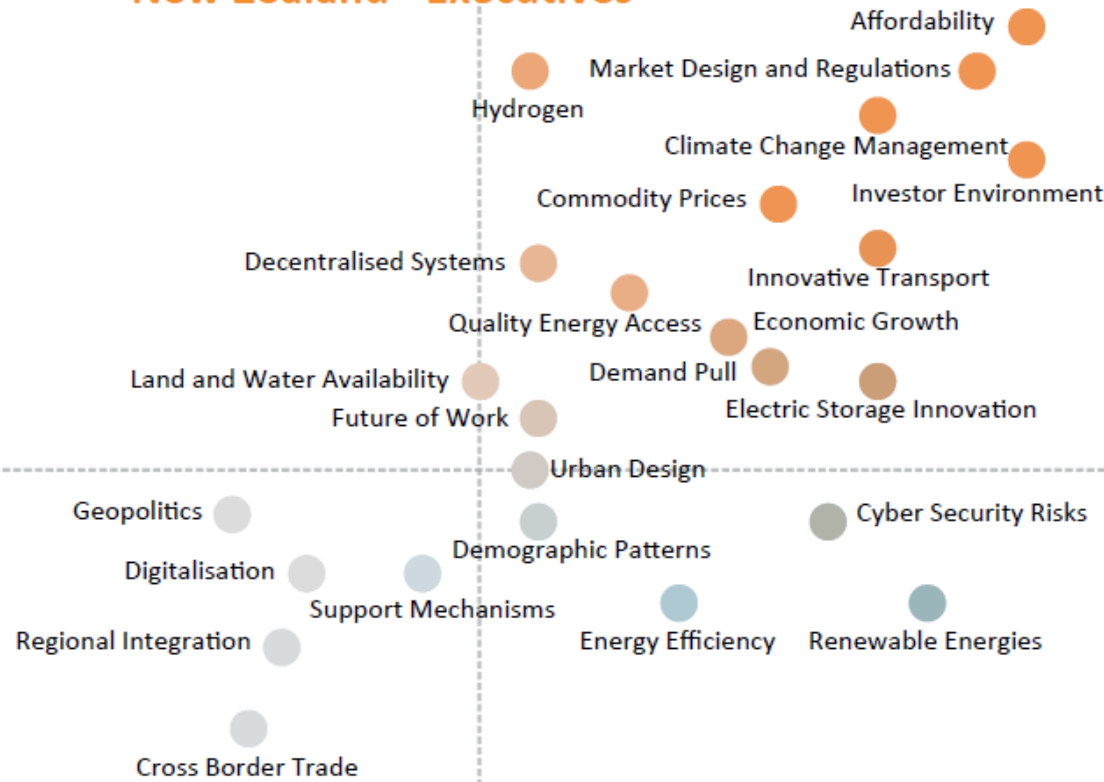
Very Low

Very High

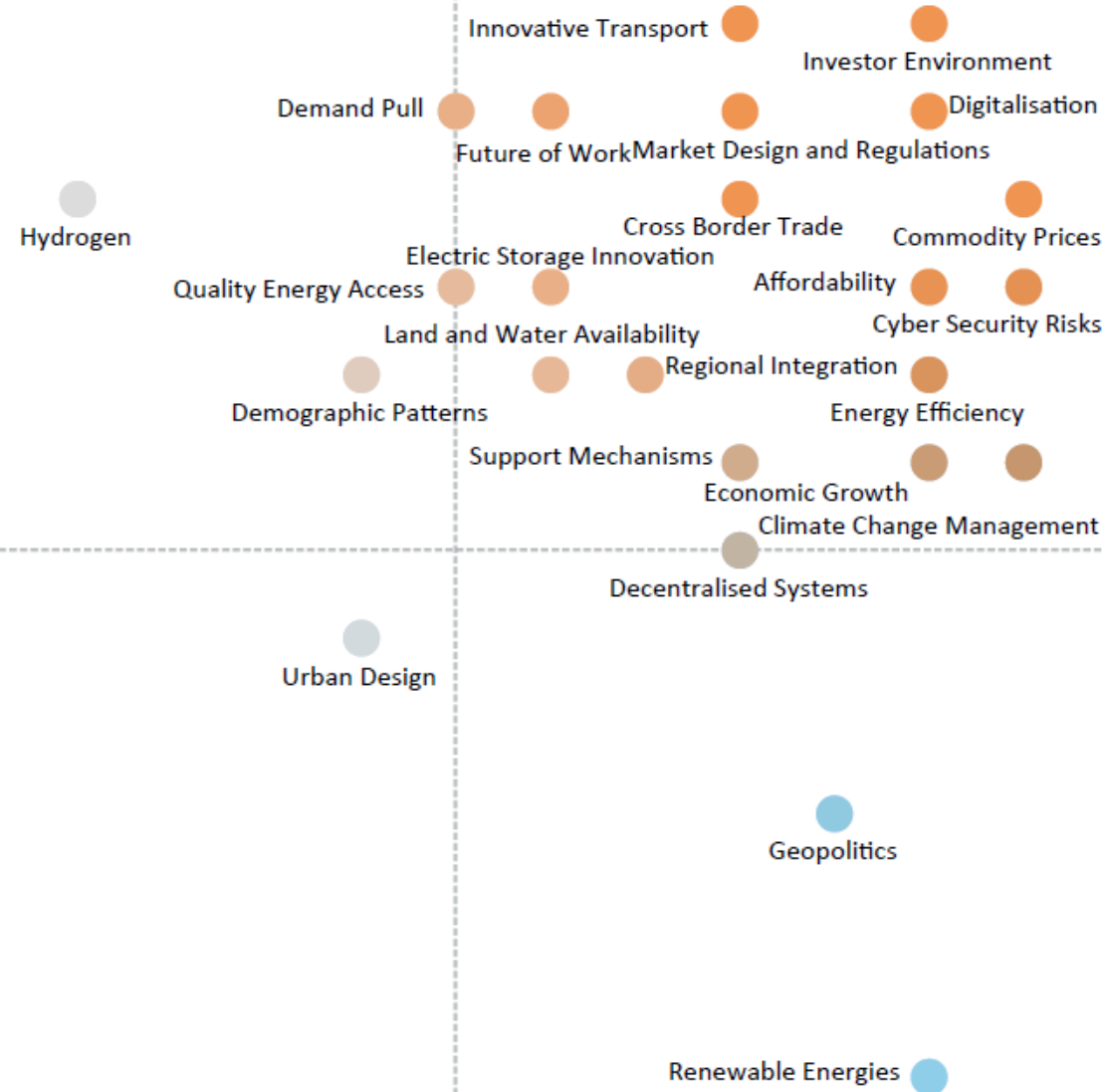
Very Low

Very High

## New Zealand - Executives



## New Zealand - Future Energy Leaders



Impact line

Uncertainties: what keeps energy leaders awake at night

Action Priorities: what keeps energy leaders busy at work

Impact line

Uncertainties: what keeps energy leaders awake at night

Action Priorities: what keeps energy leaders busy at work

Very High

Very Low

Very High

Very High

Very Low

Very High

## CONVERSATION STARTERS

- What can help to resolve Critical Uncertainties and turn more issues into **Action Priorities**?
- What alliances and collaborations are required to mitigate risks posed by such a high degree of uncertainty?
  - How can **Climate Change Management** be shifted into the action priority domain?
  - What is the interplay between **Geopolitics, Climate Change Management** and **Commodity Prices**?
  - How can uncertainty in **Commodity Prices** be managed in the short and medium term?
  - How can investments in Digitalisation, Renewable Energies and Energy Efficiency impact **quality energy access**?
- How can we use **Scenarios** to structure conversations around Critical Uncertainties?
- What does **Equity Resilience** look like?

Thank you