

ANNEX 1

**WORLD
ENERGY
COUNCIL**

BusinessNZ
Energy Council

Member of the World Energy Council



World Energy Issues Monitor 2016

New Zealand and the World



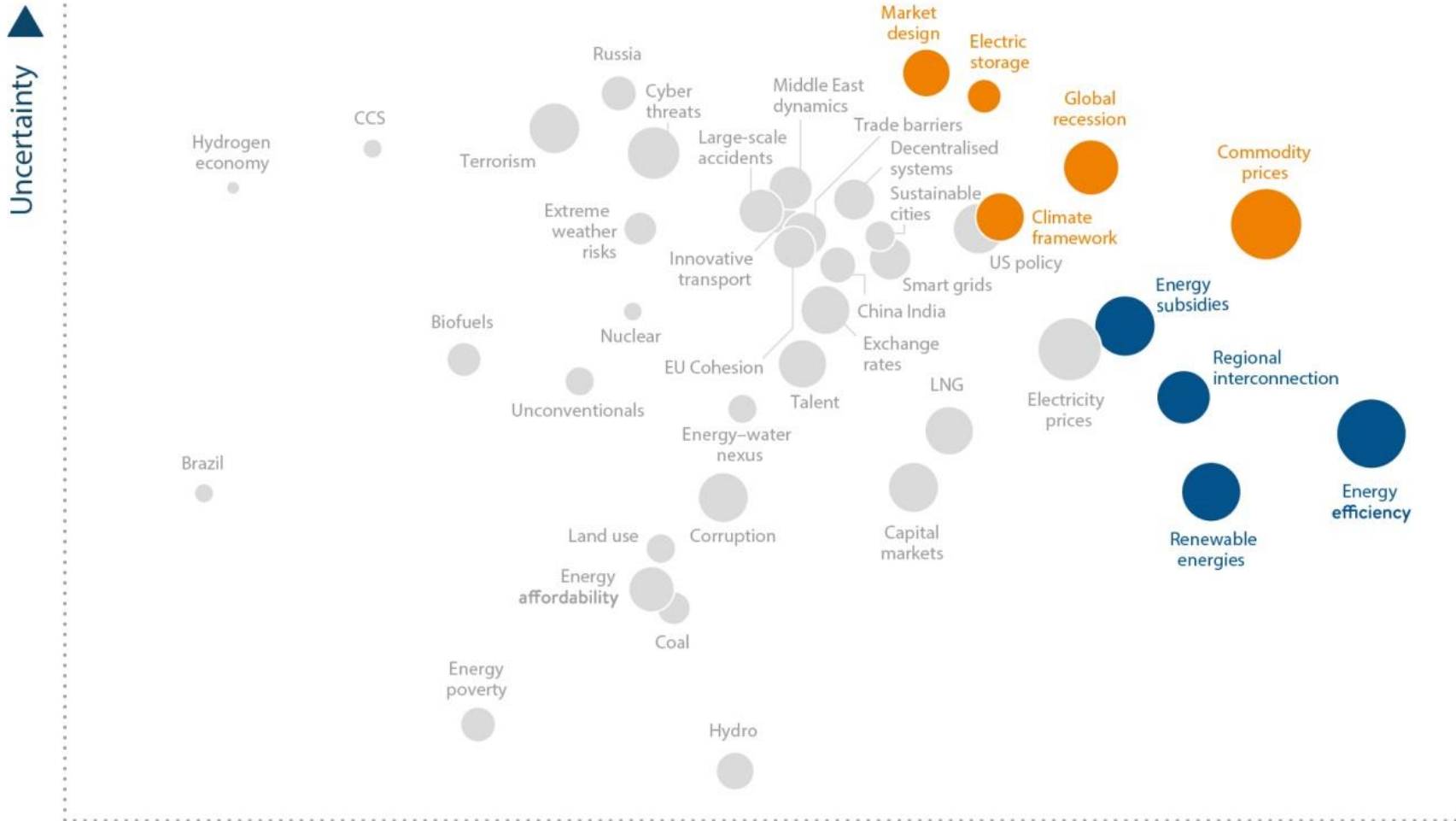
How to read the Issues Monitor

Critical uncertainties: Issues with high uncertainty and high impact (in the top-right quadrant) are the ‘critical uncertainties’ with no clear path of action which keep energy leaders most awake at night. These issues need to be part of the energy leaders’ dialogue and scenario analysis. → **What keeps energy leaders awake at night?**

Action priorities: The issues in the high-impact and low-uncertainty space are those which keep energy leaders most busy (bottom-right, ‘action issues’).
→ **What keeps energy leaders busy at work?**

Weak signals: The low-impact and low-uncertainty issues (bottom-left quadrant) include those of perceived lesser importance or those that are still not fully understood and in need of further investigation.

The responses are translated into issue monitors with the three assessed dimensions: the impact of an issue on the energy sector – this forms the x axis; the degree of uncertainty related to its impact – this forms y axis; the urgency with which we need to address the specific issue – represented by the proportional size of the issue bubble where a larger size corresponds to a higher degree of urgency.



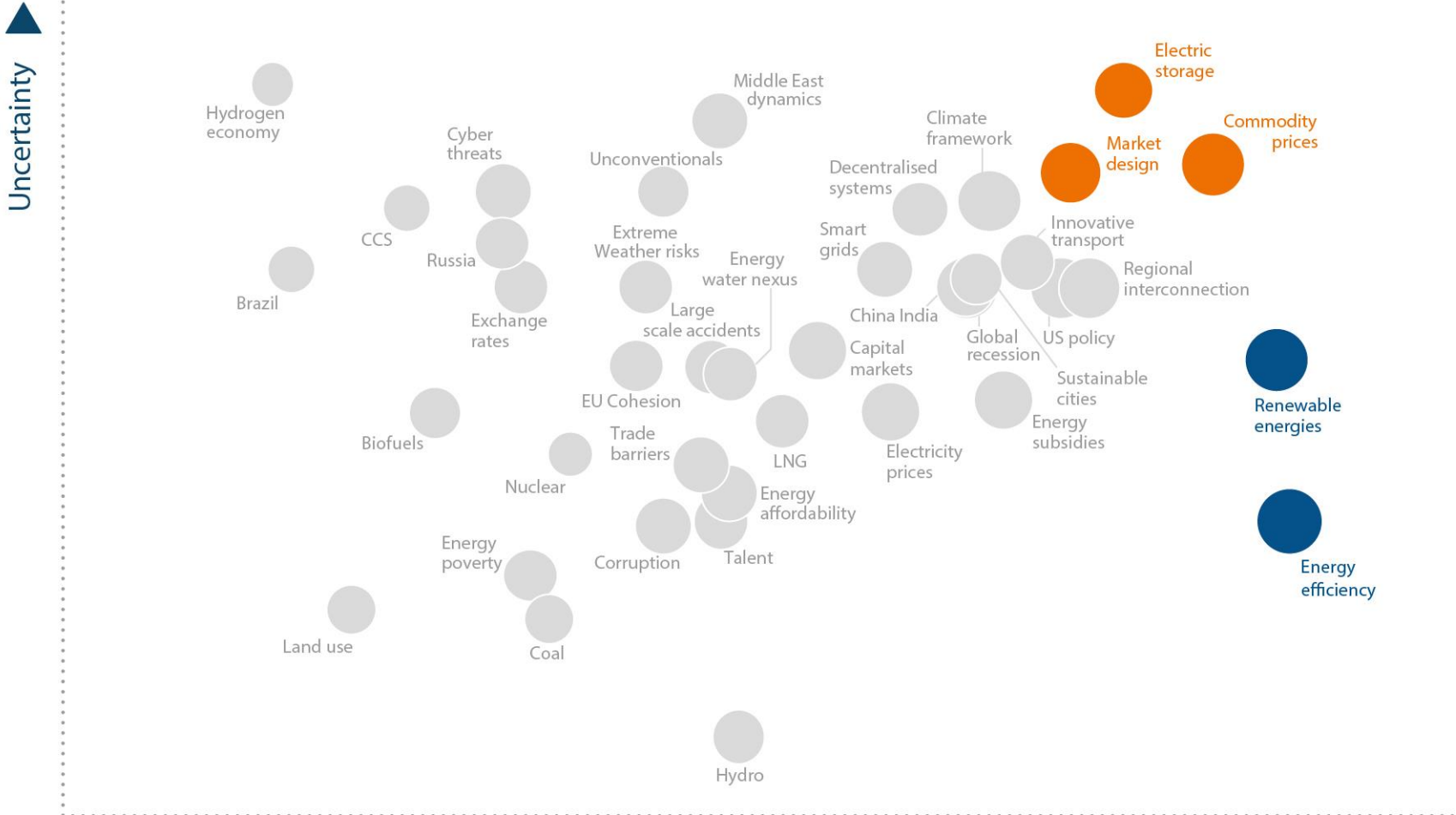
World Energy Issues Monitor 2016 - Global

Impact

● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work

Less urgent More urgent



World Energy Issues Monitor 2016 - New Zealand FEL

Impact

Critical uncertainties: what keeps future energy leaders awake at night

Action priorities: what keeps future energy leaders busy at work

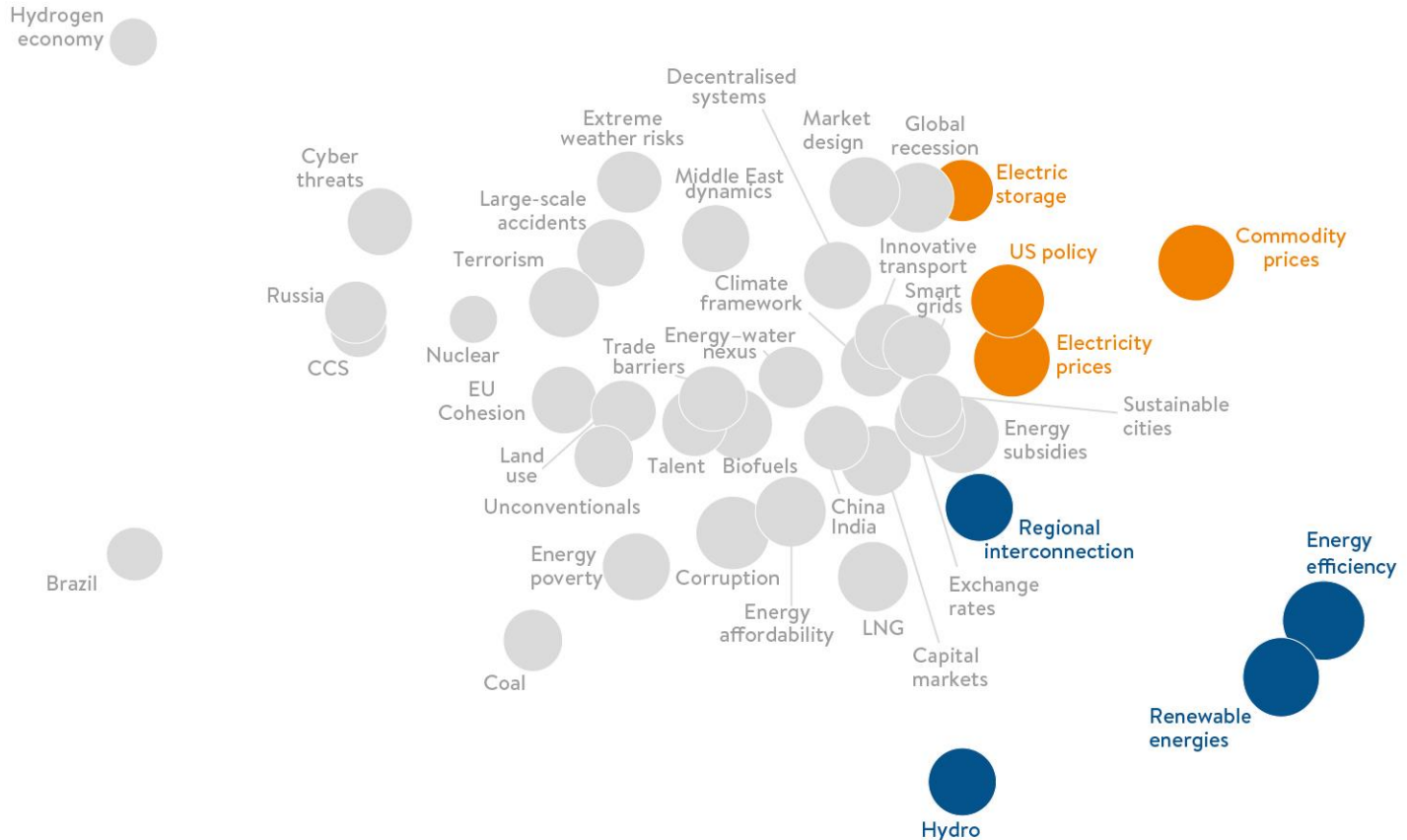
Less urgent



More urgent



▲
Uncertainty



World Energy Issues Monitor 2016 - New Zealand / Public Sector

Impact ►

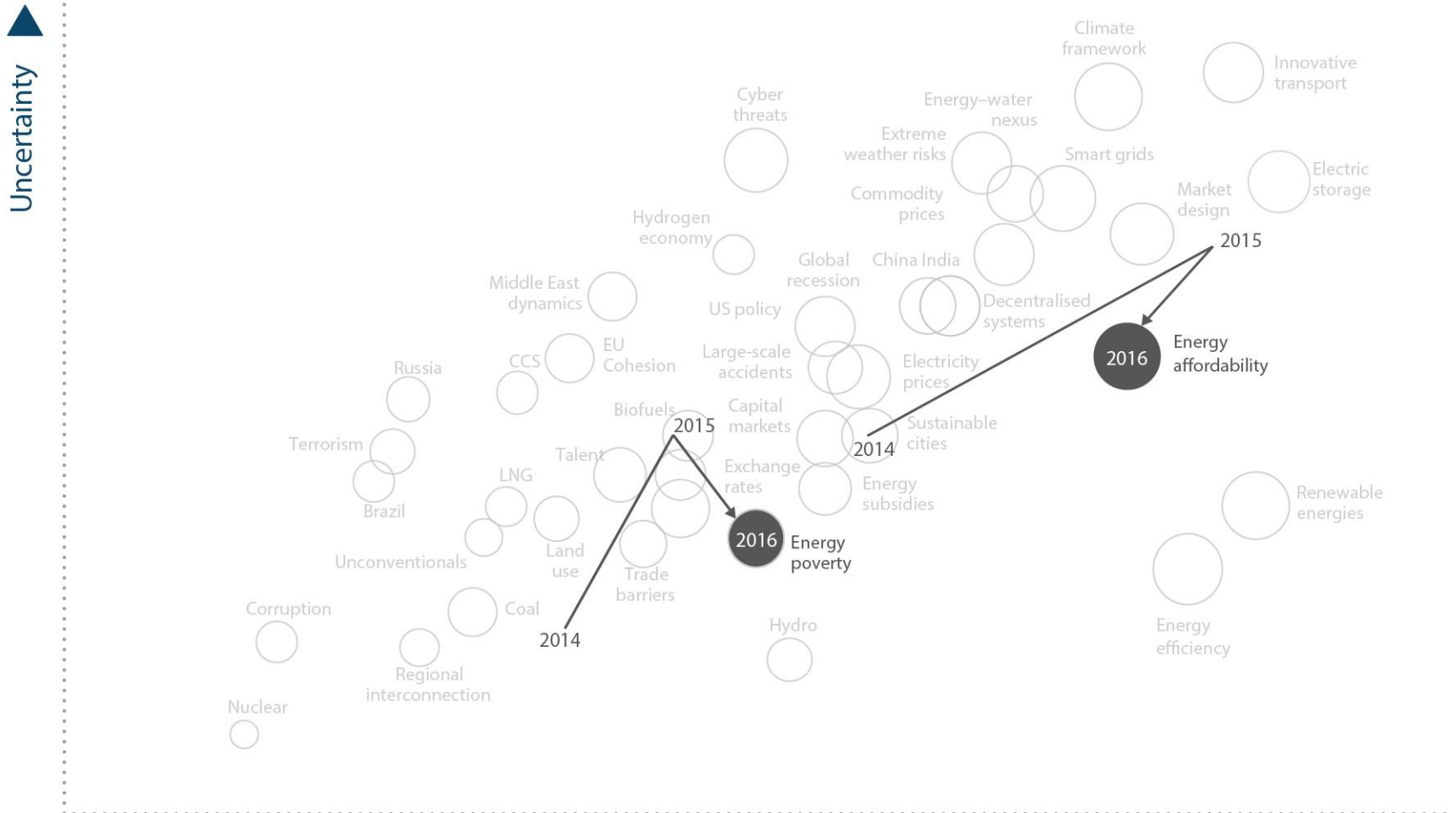
● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work

Less urgent More urgent



New Zealand Time Lapse Key Issues and Biggest Movers

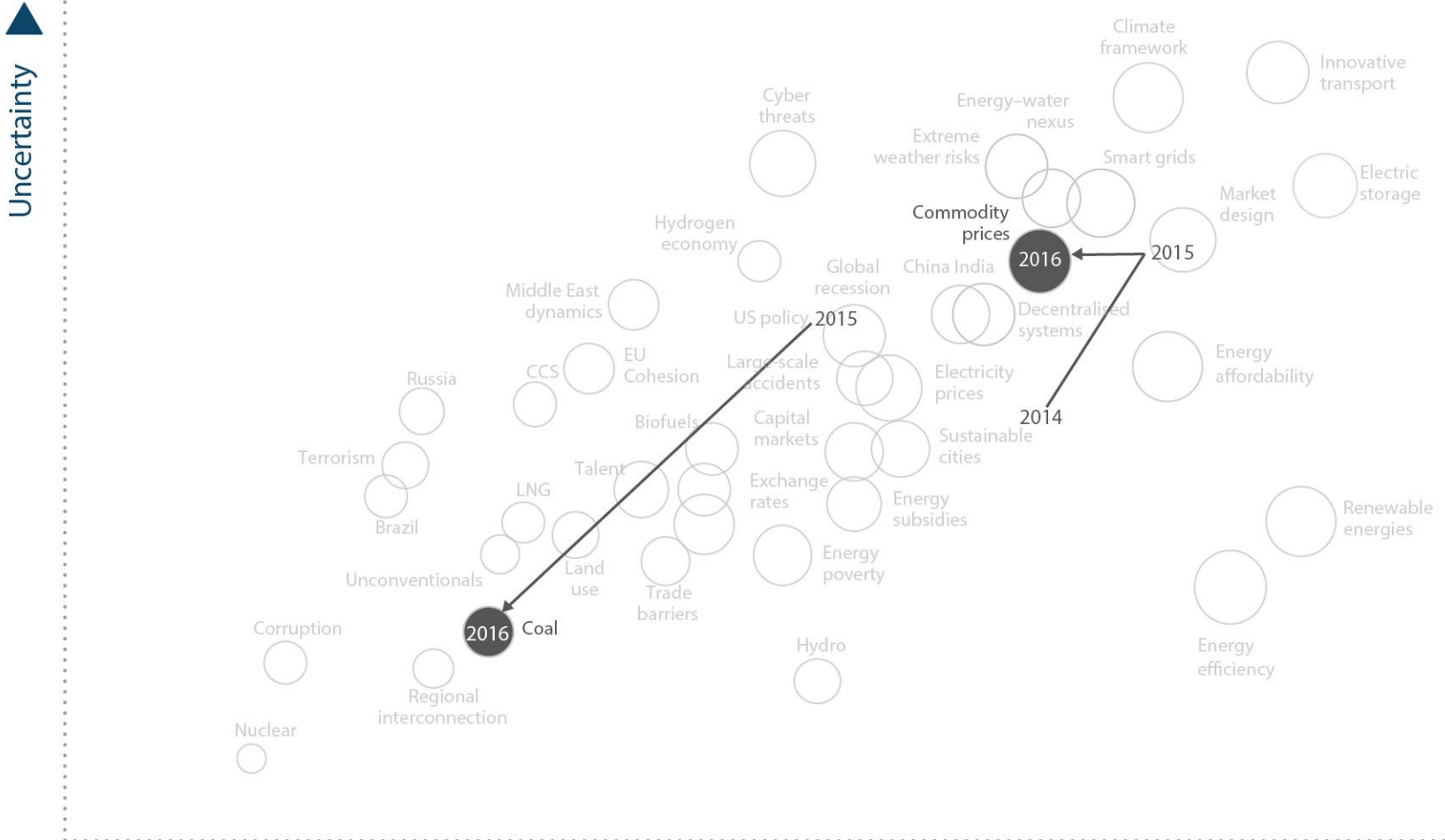


World Energy Issues Monitor 2016 - New Zealand

Impact ►

- Timelapse: Energy affordability 2014 to 2016
- Timelapse: Energy poverty 2014 to 2016

Less urgent More urgent

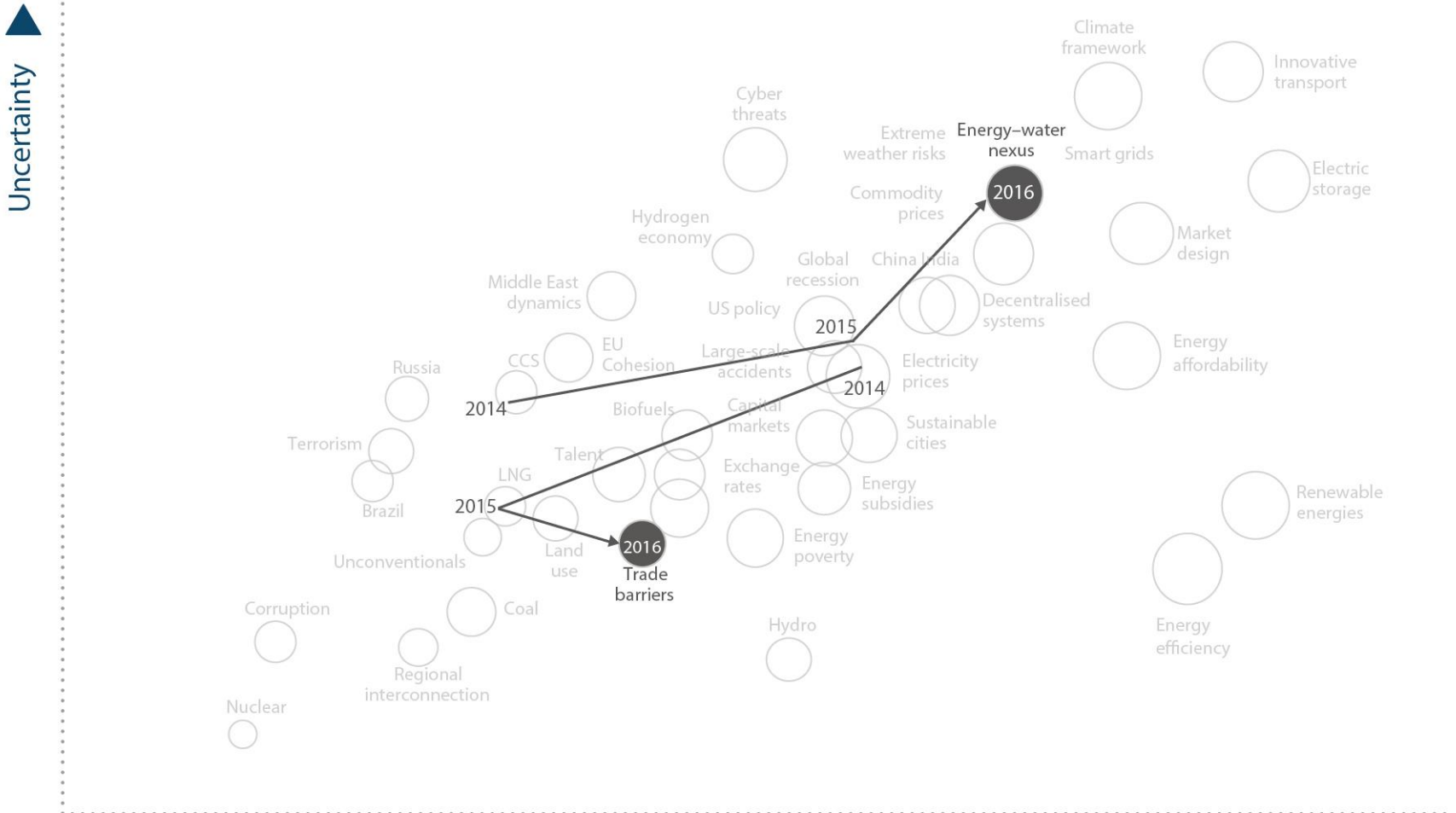


World Energy Issues Monitor 2016 - New Zealand

Impact ►

- Timelapse: coal 2015 to 2016
- Timelapse: commodity prices 2014 to 2016

Less urgent More urgent

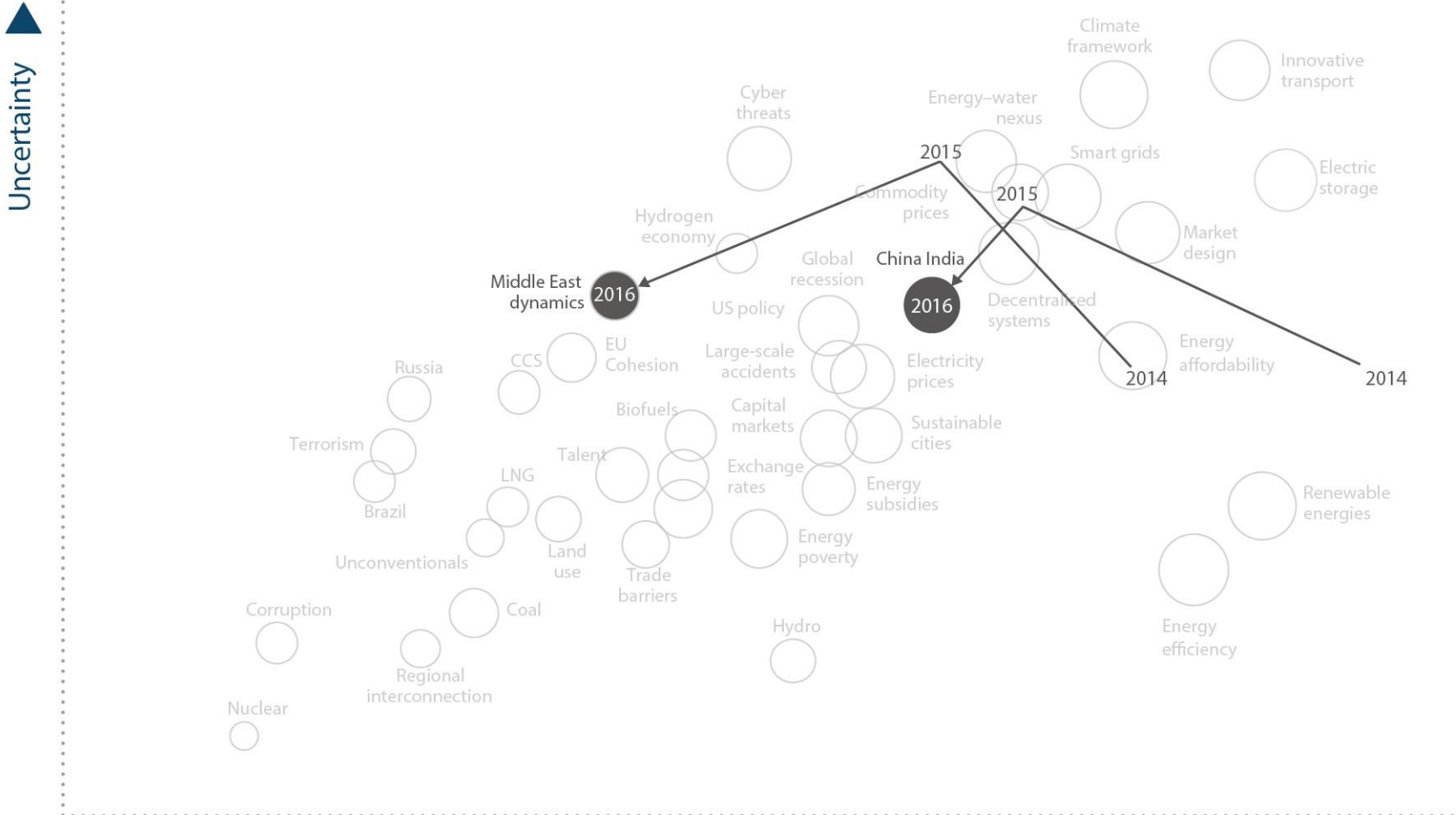


World Energy Issues Monitor 2016 - New Zealand

Impact ►

- Timelapse: Energy-water nexus 2014 to 2016
- Timelapse: Trade barriers 2014 to 2016

Less urgent More urgent



World Energy Issues Monitor 2016 - New Zealand

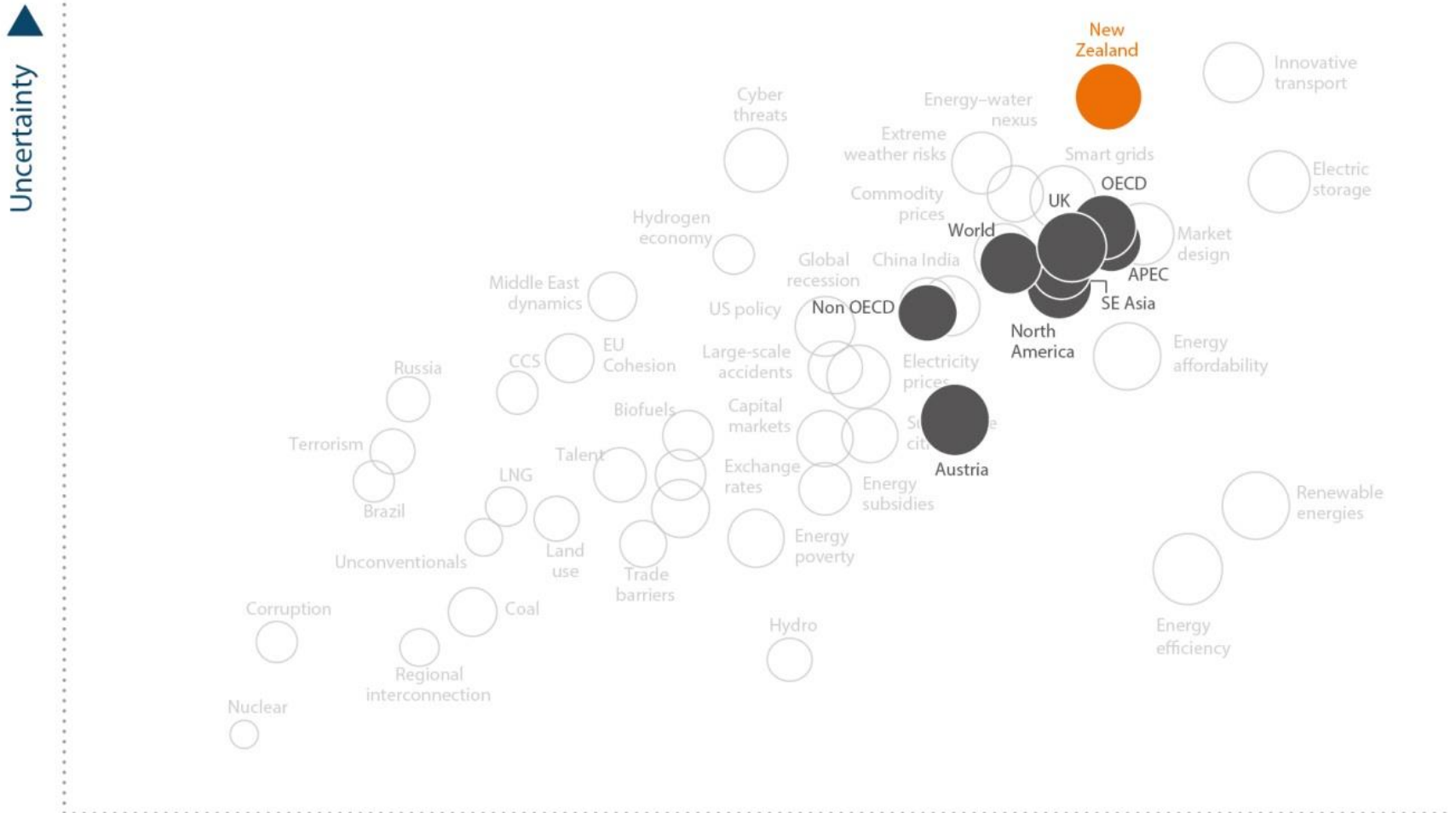
Impact ►

- Timelapse: China & India 2014 to 2016
- Timelapse: Middle East dynamics 2014 to 2016

Less urgent More urgent



New Zealand Issue Comparisons with other Regions/Countries

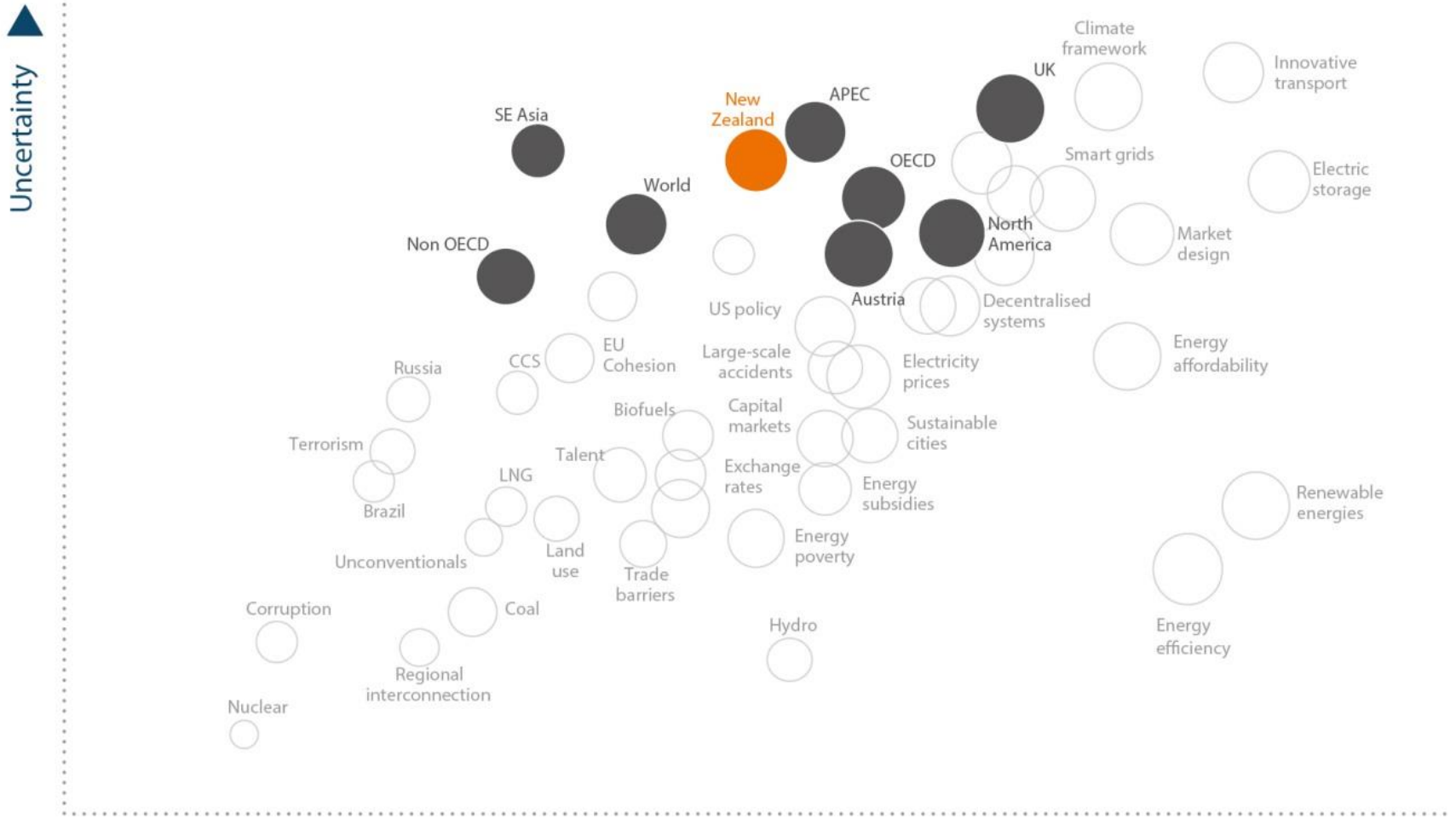


World Energy Issues Monitor 2016 - Climate Framework

Impact

- Climate Framework: New Zealand
- Climate Framework: Other regions

Less urgent More urgent

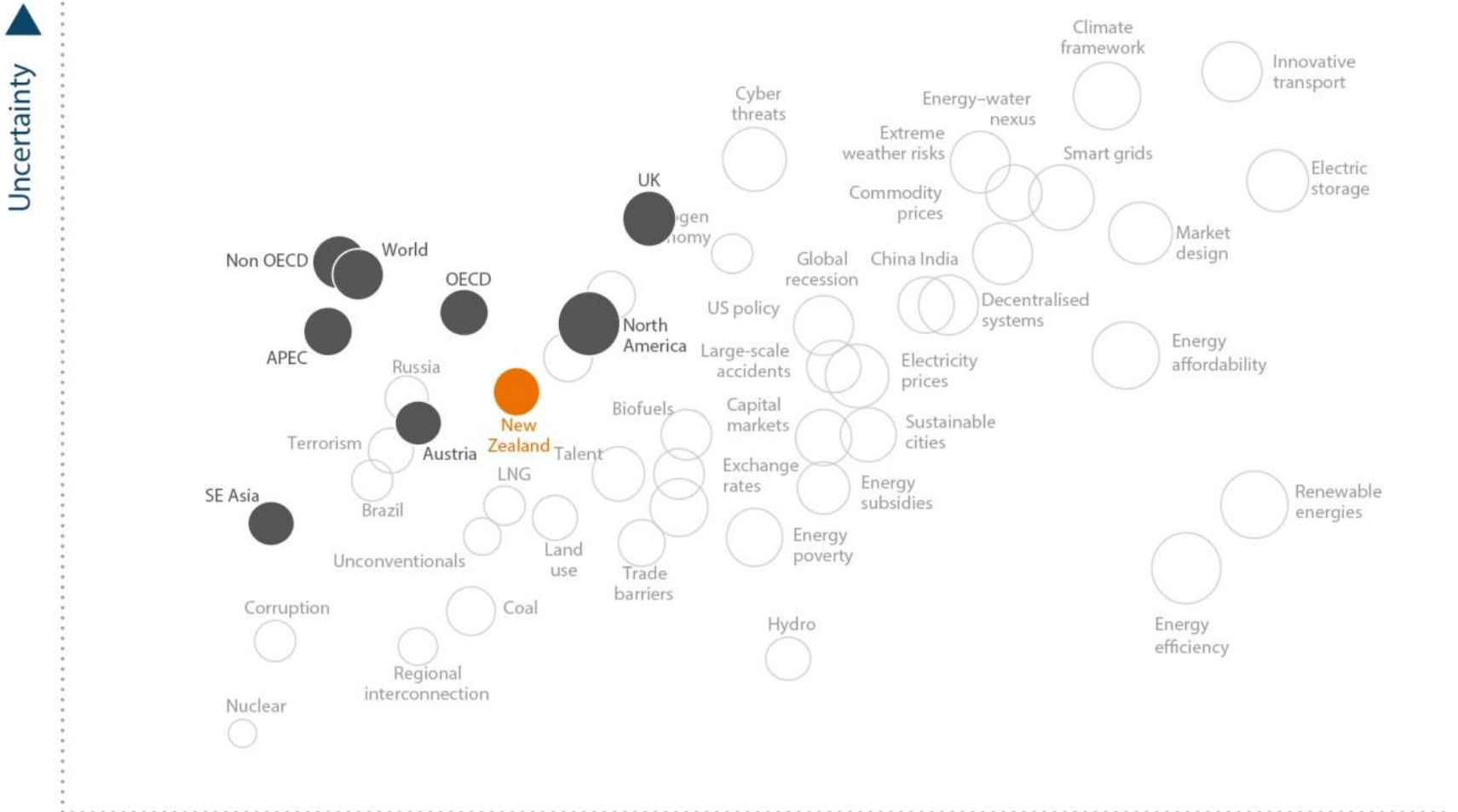


World Energy Issues Monitor 2016 - Cyber Threats

Impact ►

- Cyber threats: New Zealand
- Cyber threats: Other regions

Less urgent More urgent

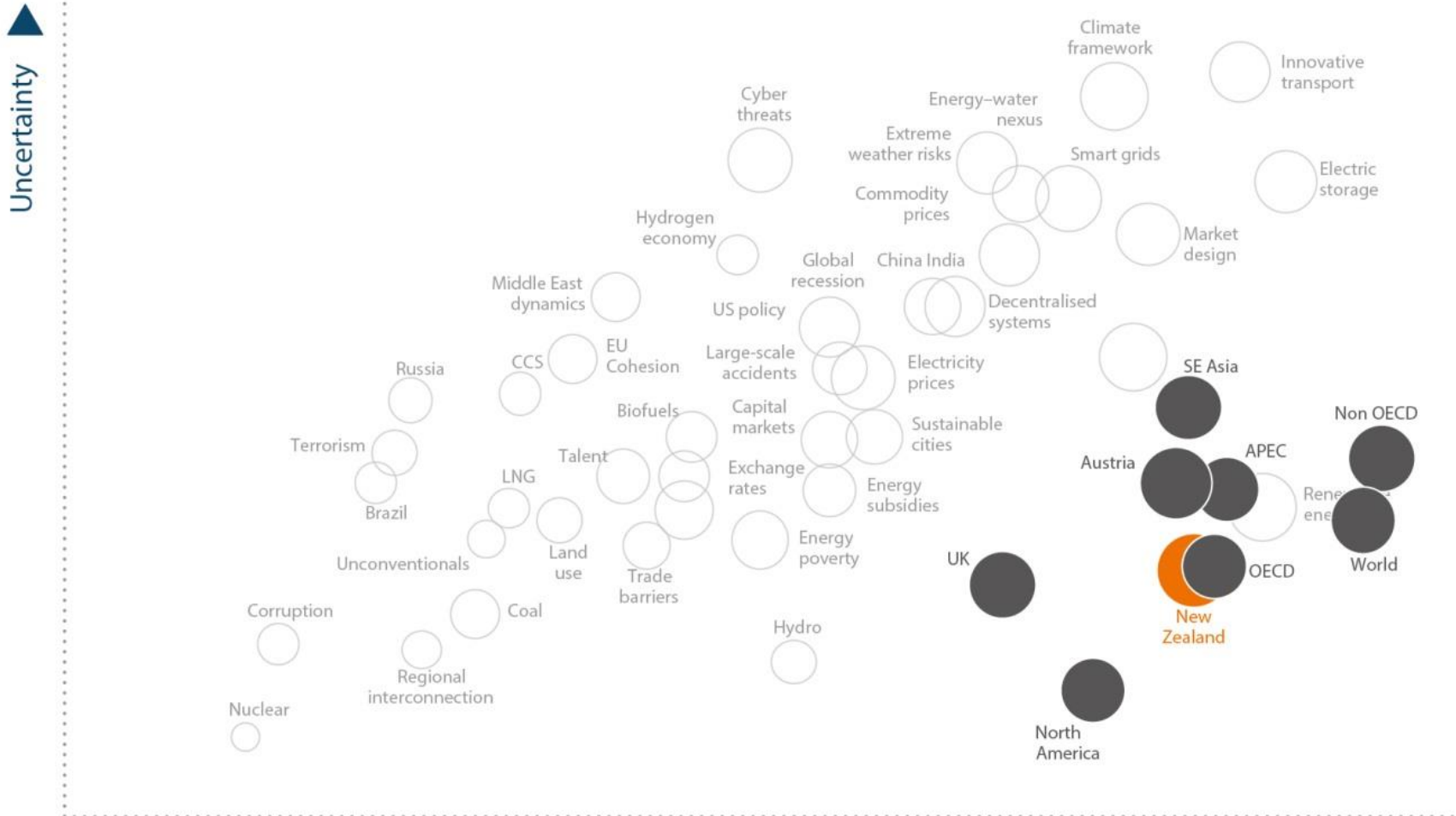


World Energy Issues Monitor 2016 - CCS

Impact

- CCS: New Zealand
- CCS: Other regions

Less urgent More urgent

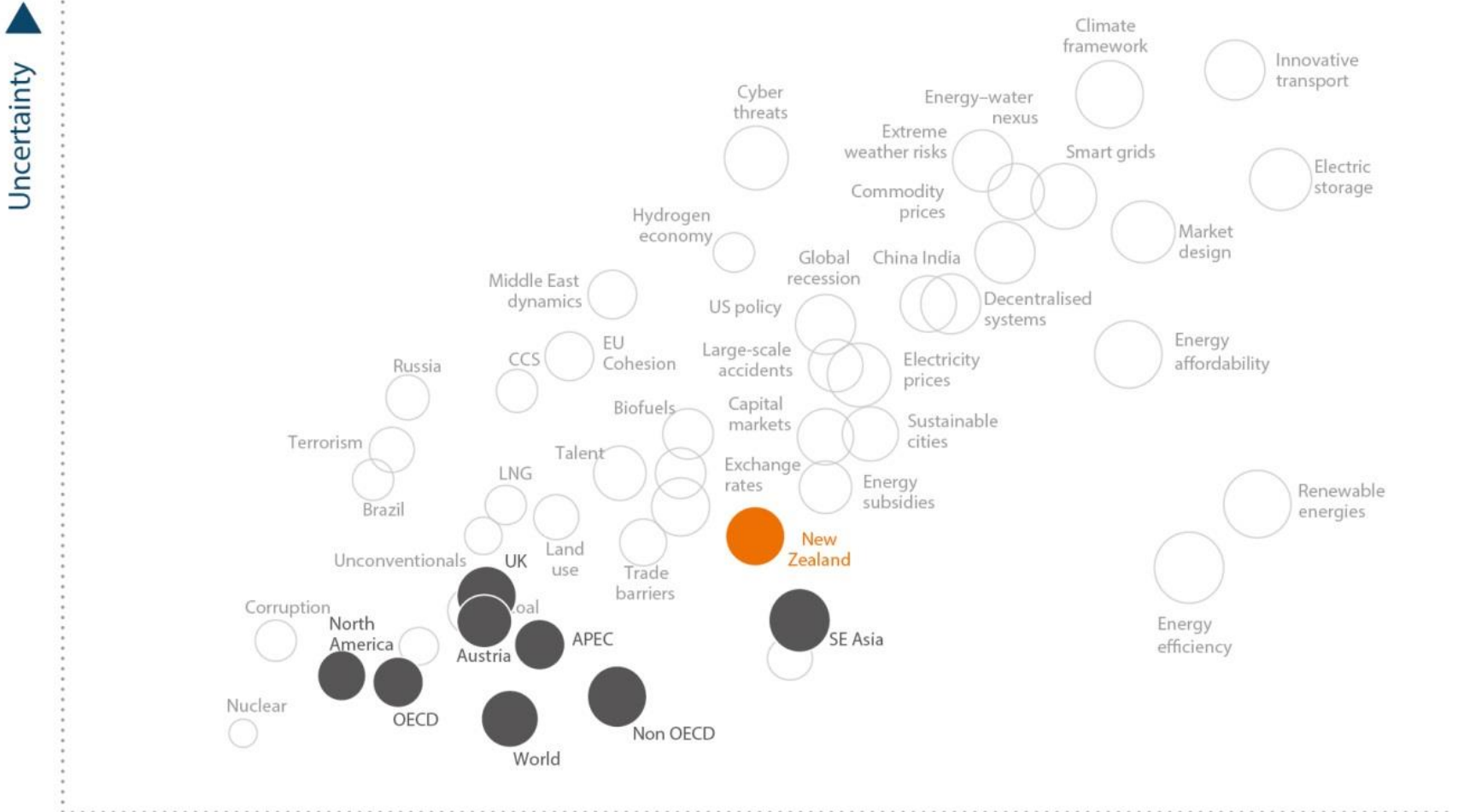


World Energy Issues Monitor 2016 - Energy Efficiency

Impact

- Energy efficiency: New Zealand
- Energy efficiency: Other regions

Less urgent More urgent

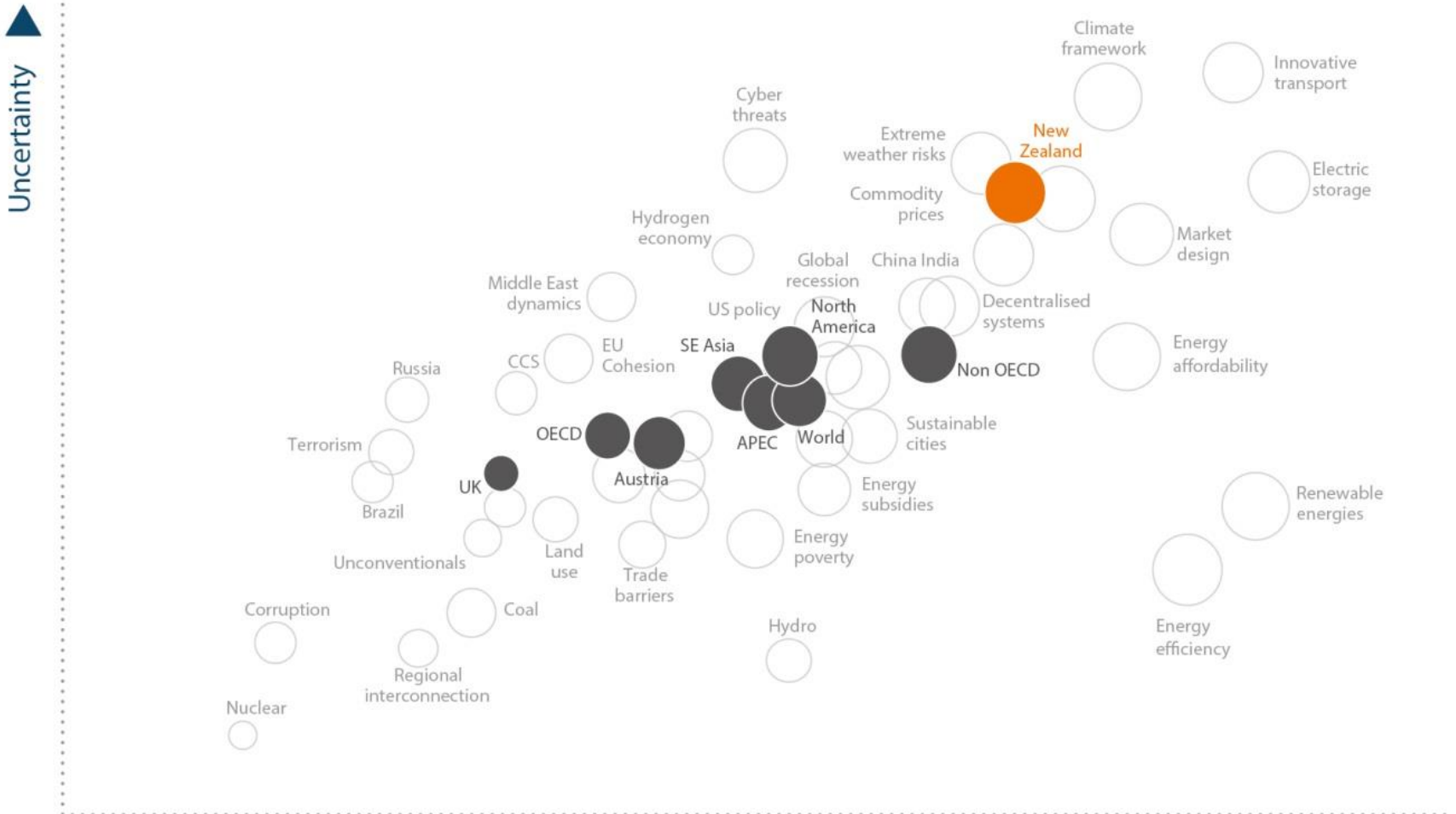


World Energy Issues Monitor 2016 - Energy Poverty

Impact ►

- Energy poverty: New Zealand
- Energy poverty: Other regions

Less urgent More urgent

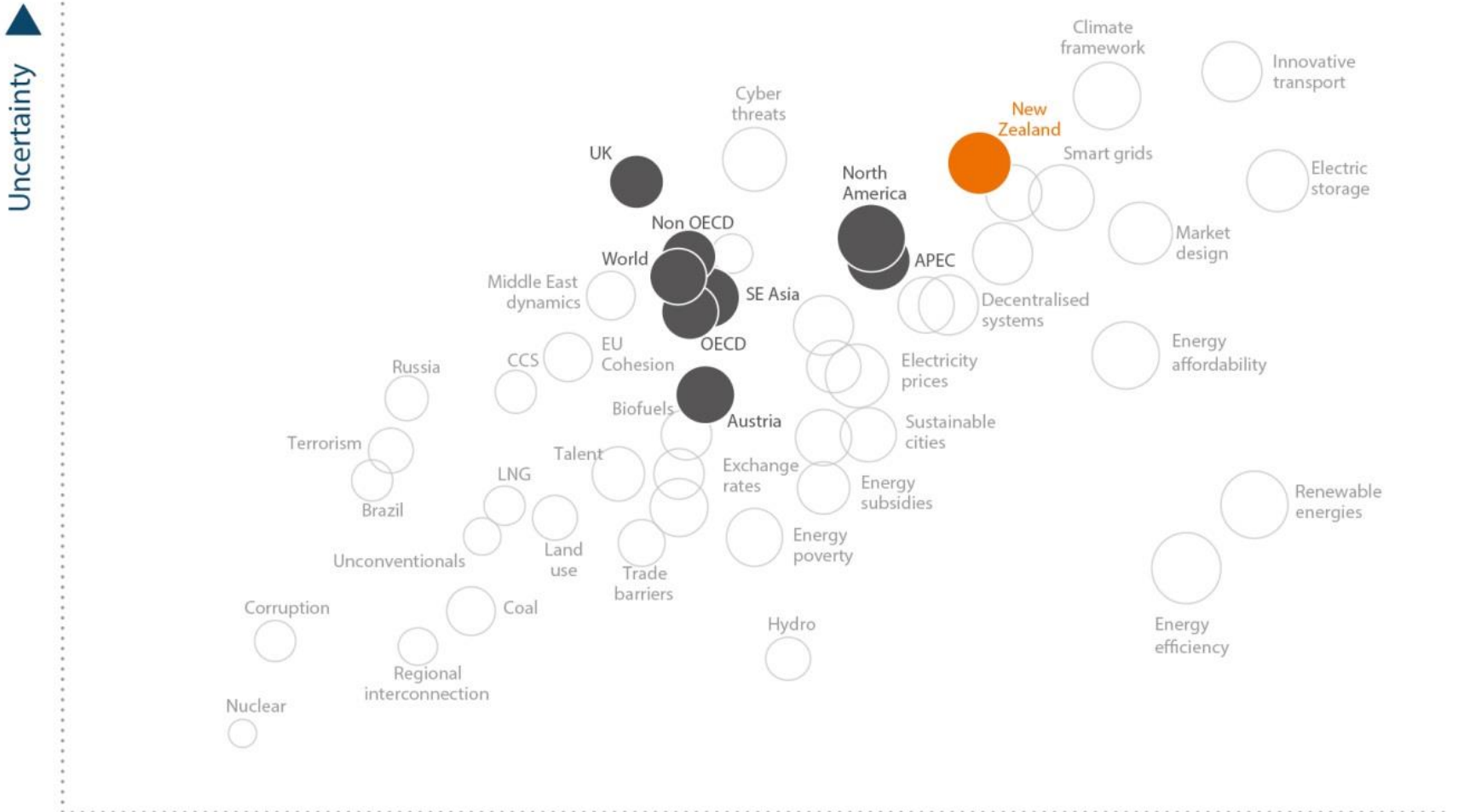


World Energy Issues Monitor 2016 - Energy Water Nexus

Impact

- Energy water nexus: New Zealand
- Energy water nexus: Other regions

Less urgent More urgent

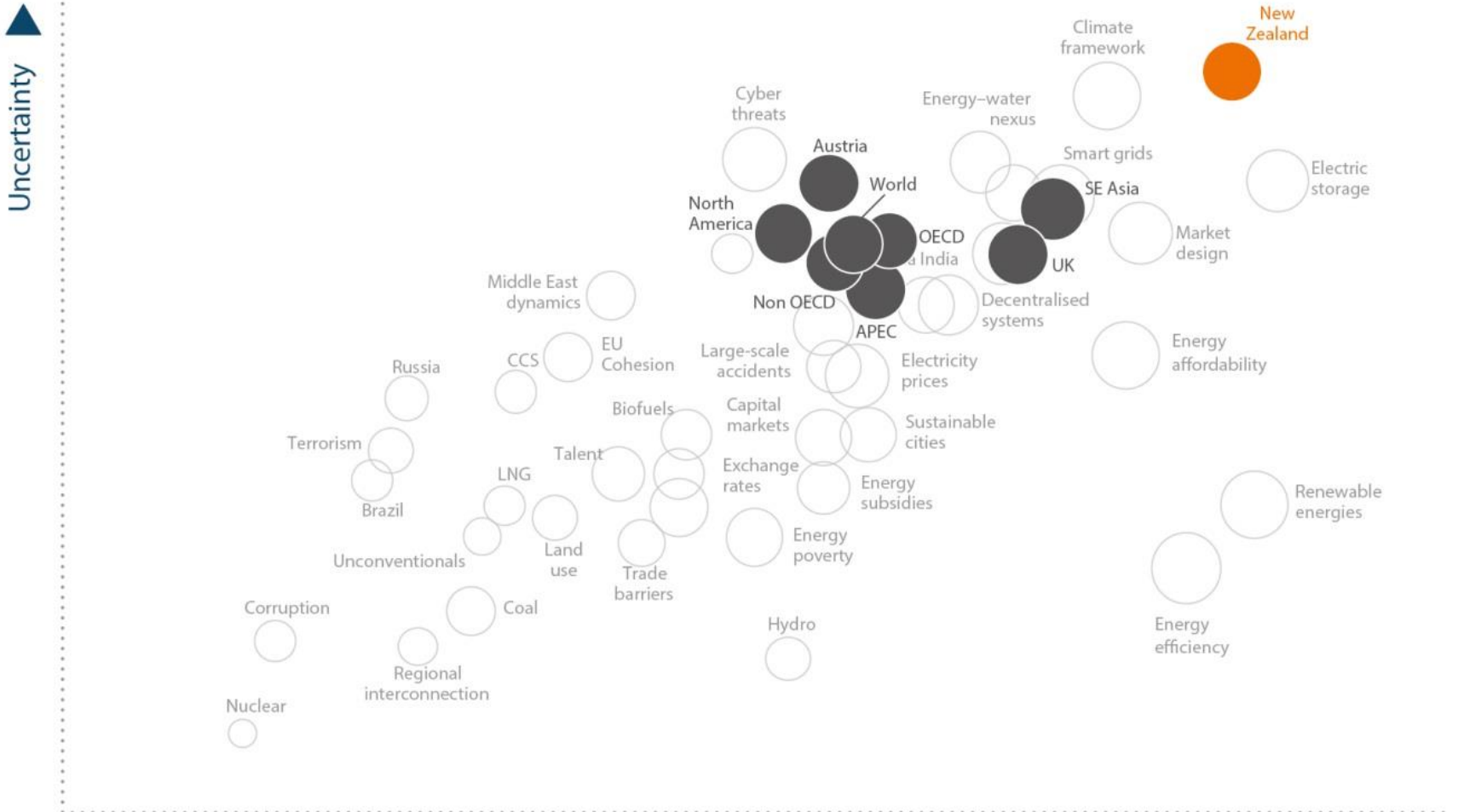


World Energy Issues Monitor 2016 - Extreme Weather Risks

Impact ►

- Extreme weather risks: New Zealand
- Extreme weather risks: Other regions

Less urgent More urgent

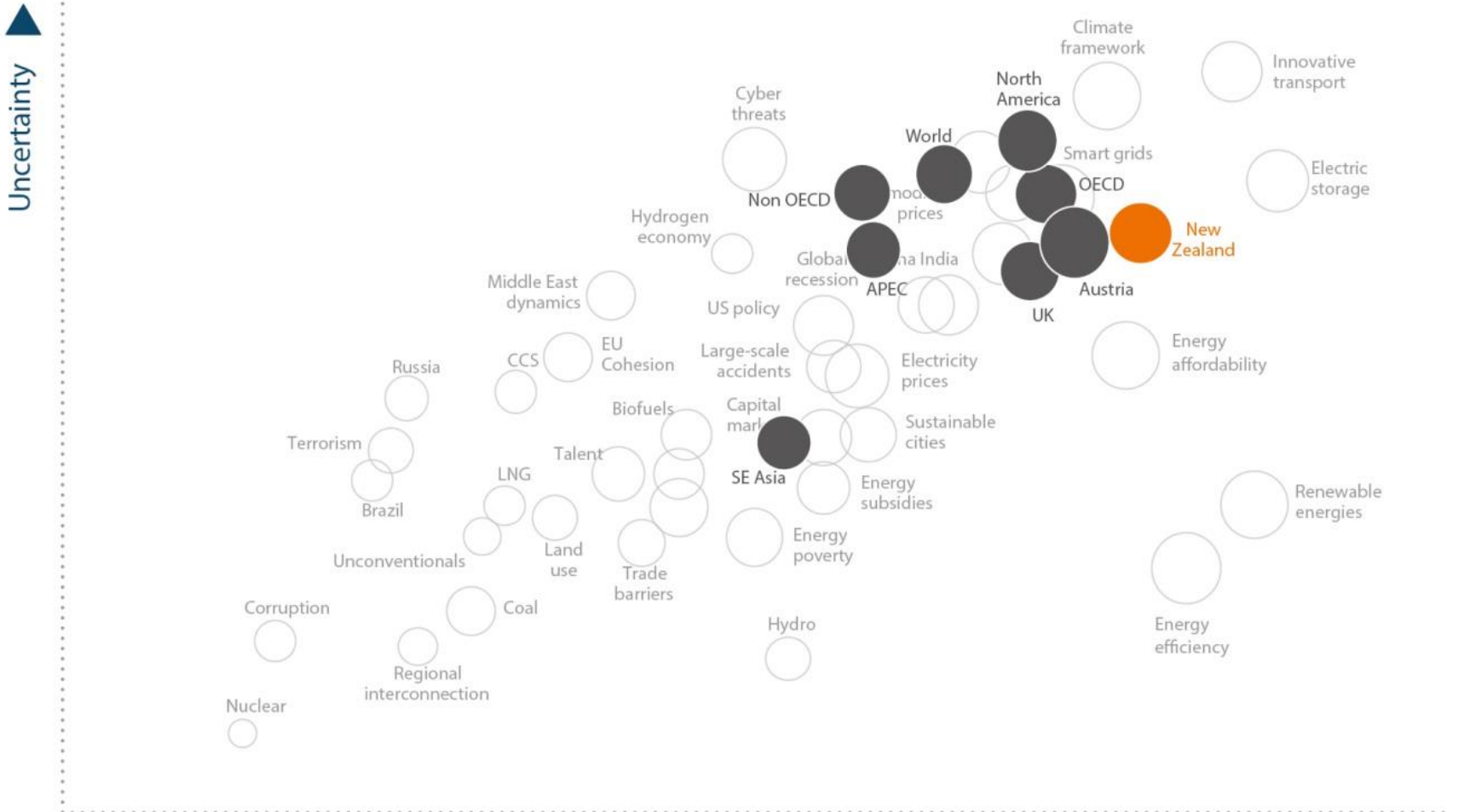


World Energy Issues Monitor 2016 - Innovative Transport

Impact

- Innovative transport: New Zealand
- Innovative transport: Other regions

Less urgent More urgent

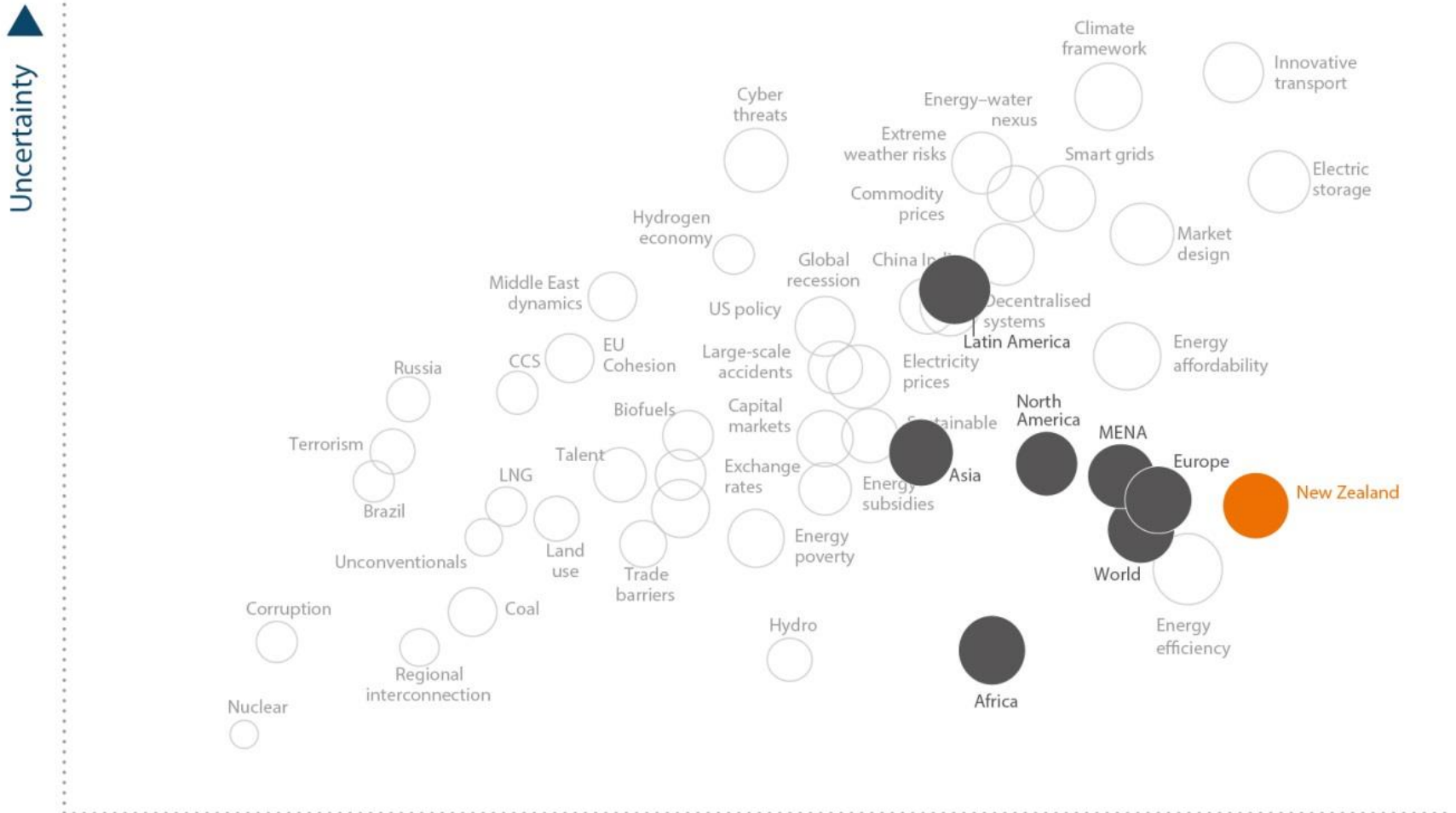


World Energy Issues Monitor 2016 - Market Design

Impact

- Market design: New Zealand
- Market design: Other regions

Less urgent More urgent



World Energy Issues Monitor 2016 - Renewables

Impact

- Renewable energies: New Zealand
- Renewable energies: Other regions

Less urgent More urgent

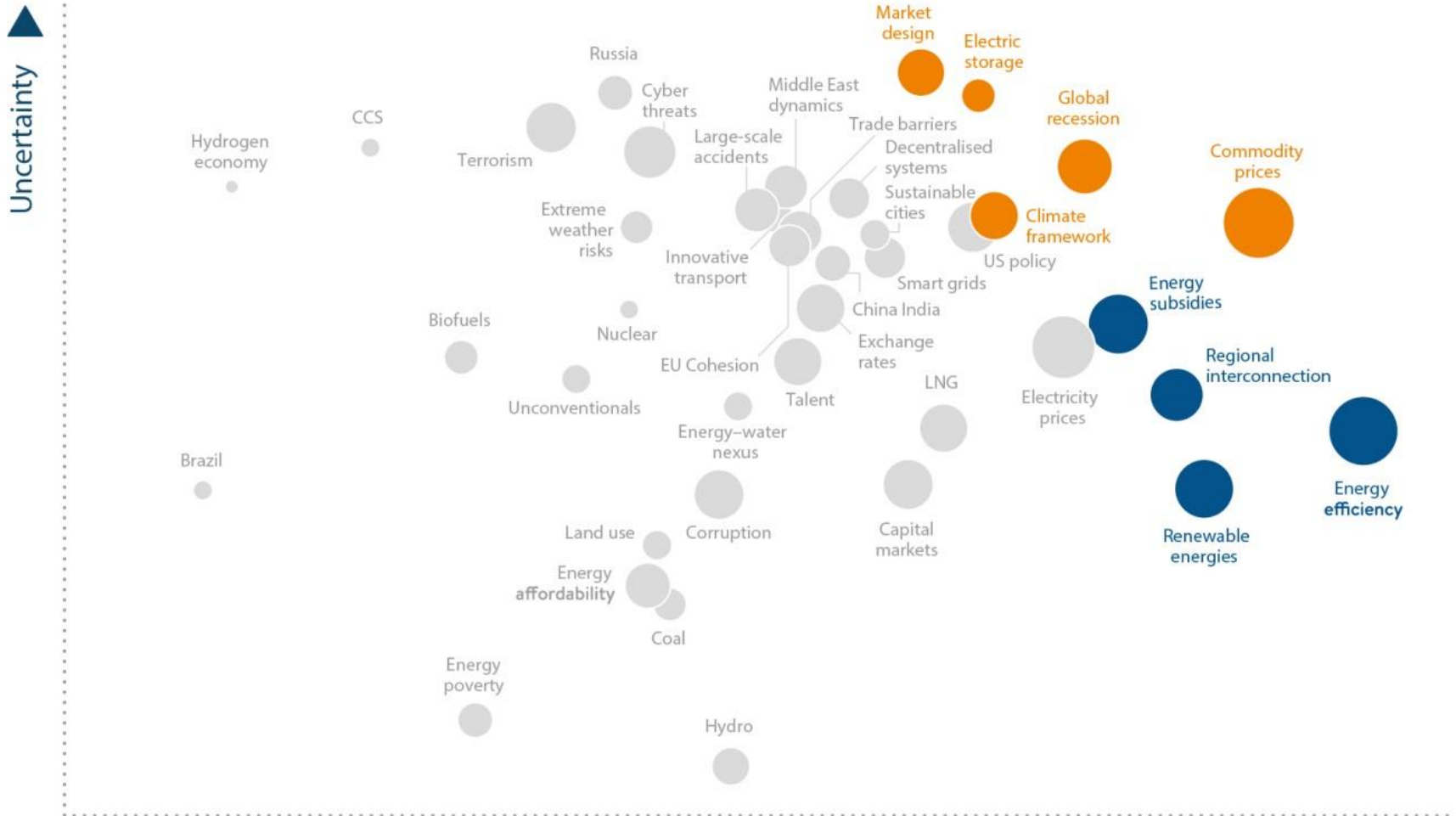
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WEC World and Regional Maps



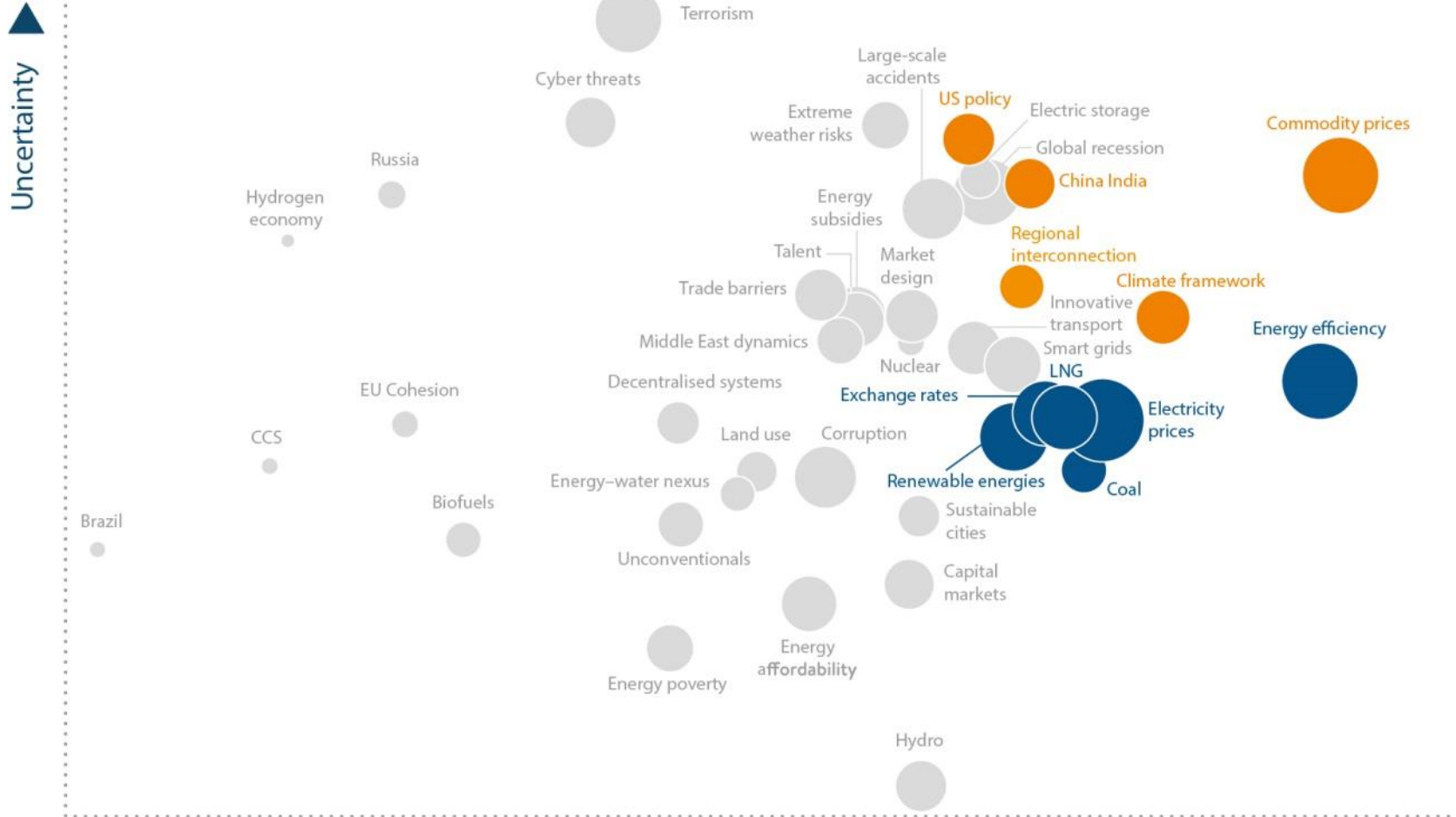
World Energy Issues Monitor 2016 - Global

Impact

● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work

Less urgent More urgent



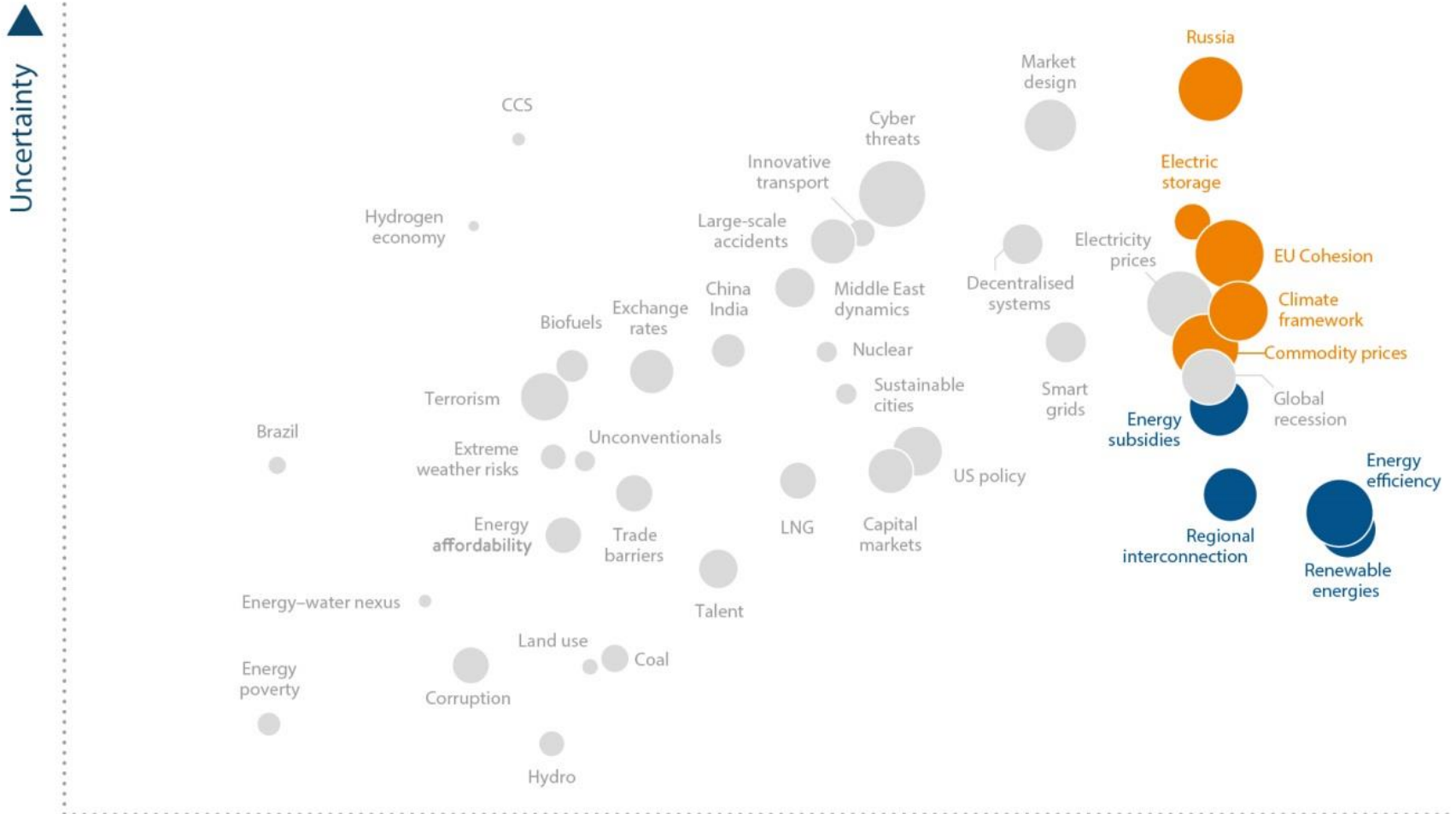
World Energy Issues Monitor 2016 - Asia

Impact ▶

● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work

Less urgent ○ ○ ○ More urgent



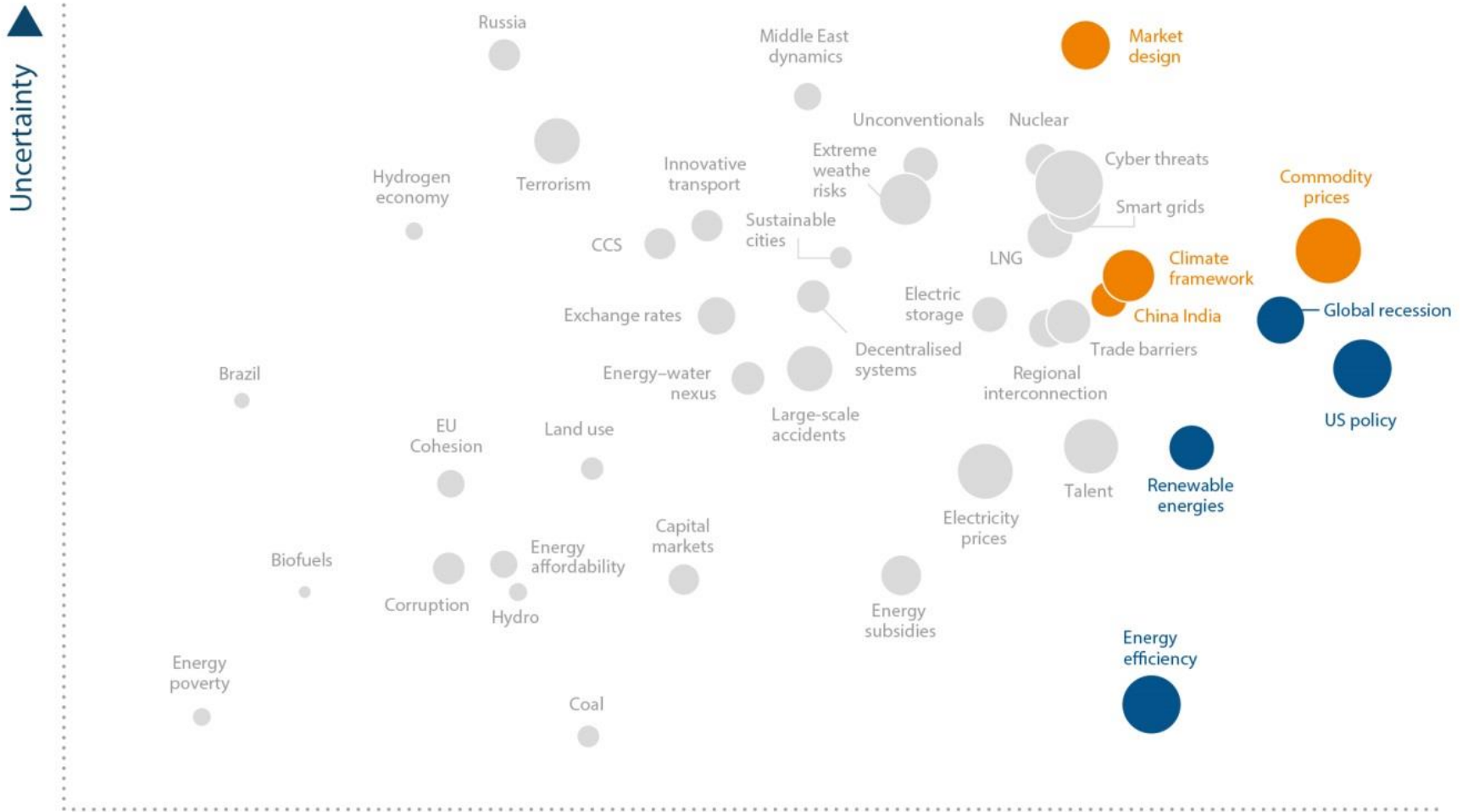
World Energy Issues Monitor 2016 - Europe

Impact

Critical uncertainties: what keeps energy leaders awake at night

Action priorities: what keeps energy leaders busy at work

Less urgent More urgent



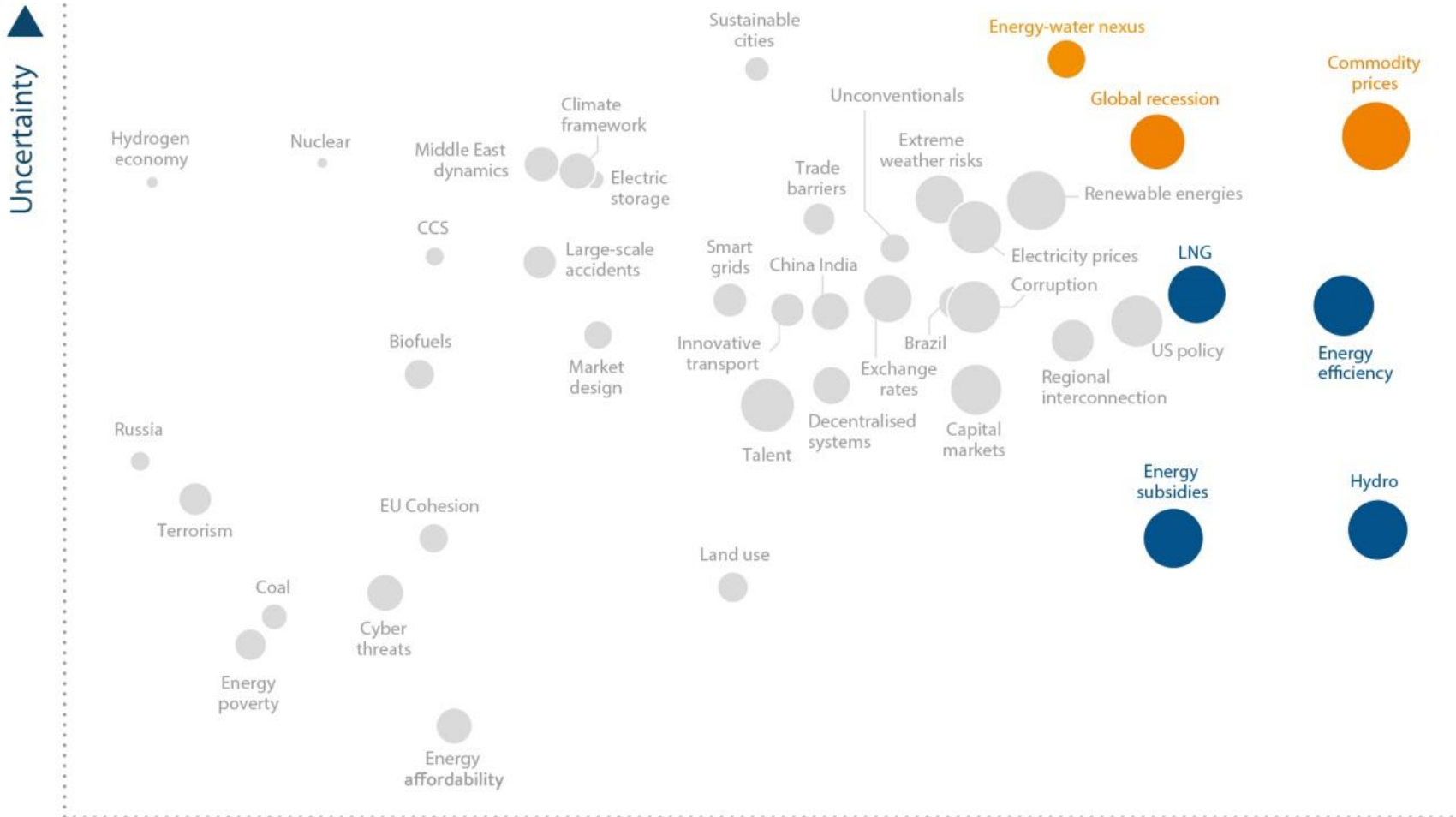
World Energy Issues Monitor 2016 - North America

Impact

● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work

Less urgent More urgent



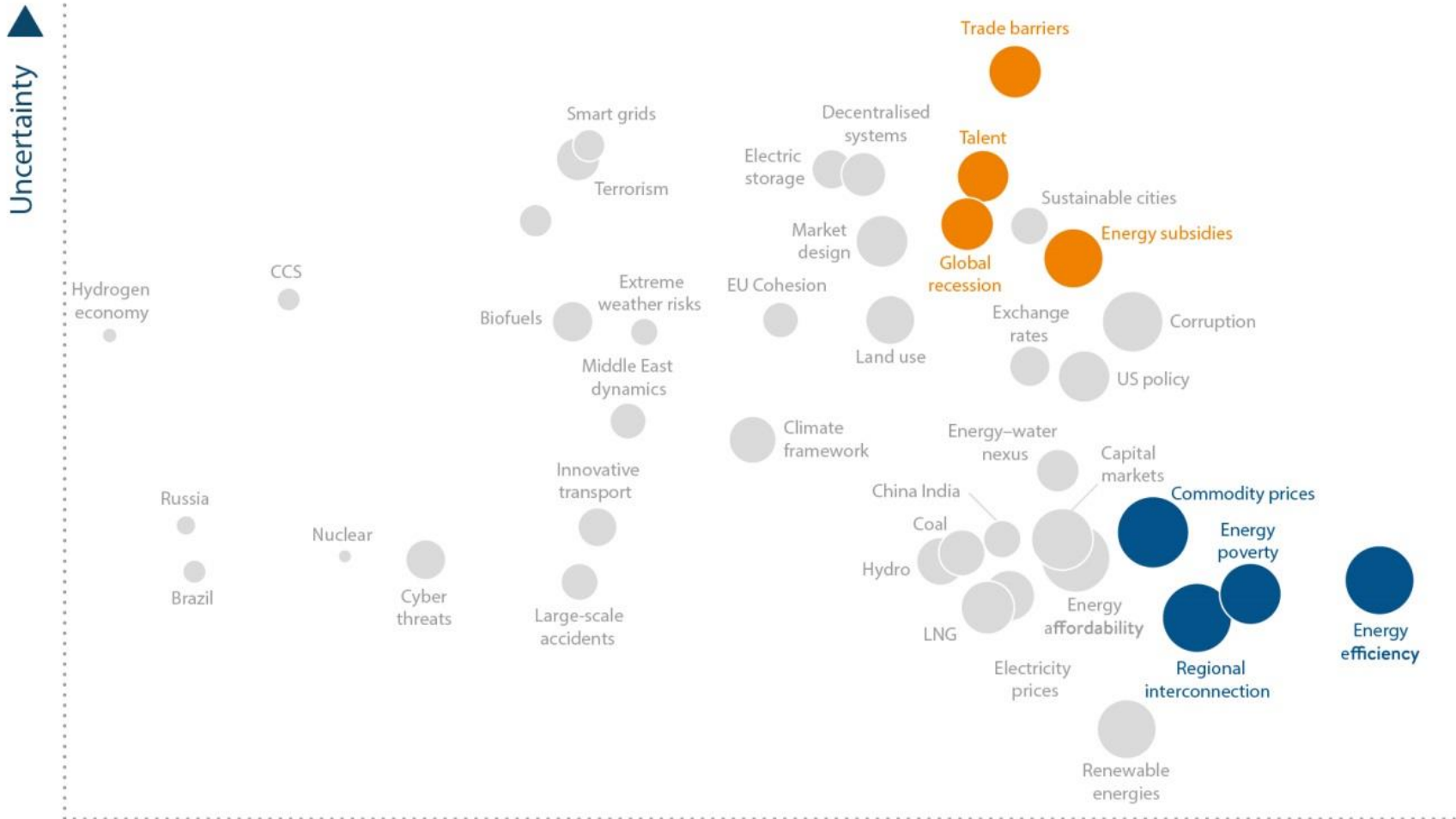
World Energy Issues Monitor 2016 - Latin America & The Caribbean

Impact

● Critical uncertainties: what keeps energy leaders awake at night

● Action priorities: what keeps energy leaders busy at work

Less urgent More urgent



World Energy Issues Monitor 2016 - Africa

Impact

Critical uncertainties: what keeps energy leaders awake at night

Action priorities: what keeps energy leaders busy at work

Less urgent More urgent

