

WORLD
ENERGY
COUNCIL

BusinessNZ
Energy Council

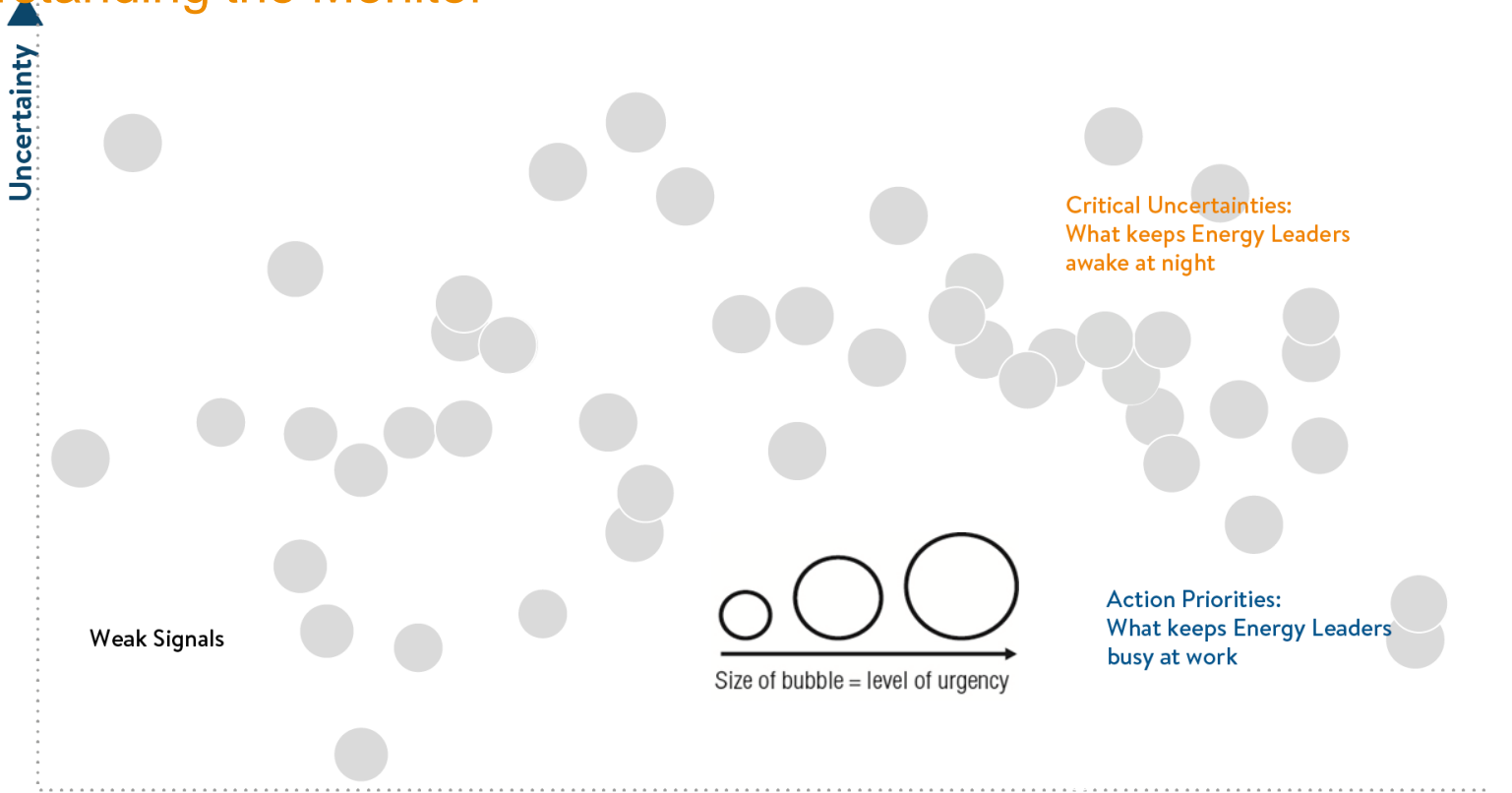
WORLD ENERGY ISSUES MONITOR 2019

www.bec.org.nz | @BusNZEnergy

1. How to read the Issues Monitor?
2. Global maps
3. New Zealand: critical uncertainties & action priorities
4. New Zealand: biggest movers
5. New Zealand: public vs private sector
6. New Zealand: geographical Tracking
7. New Zealand: Young Energy Professionals
8. Regional maps

World Energy Issues Monitor

Understanding the Monitor



World Energy Issues Monitor 2019 - Understanding the 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.

*Survey 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.*

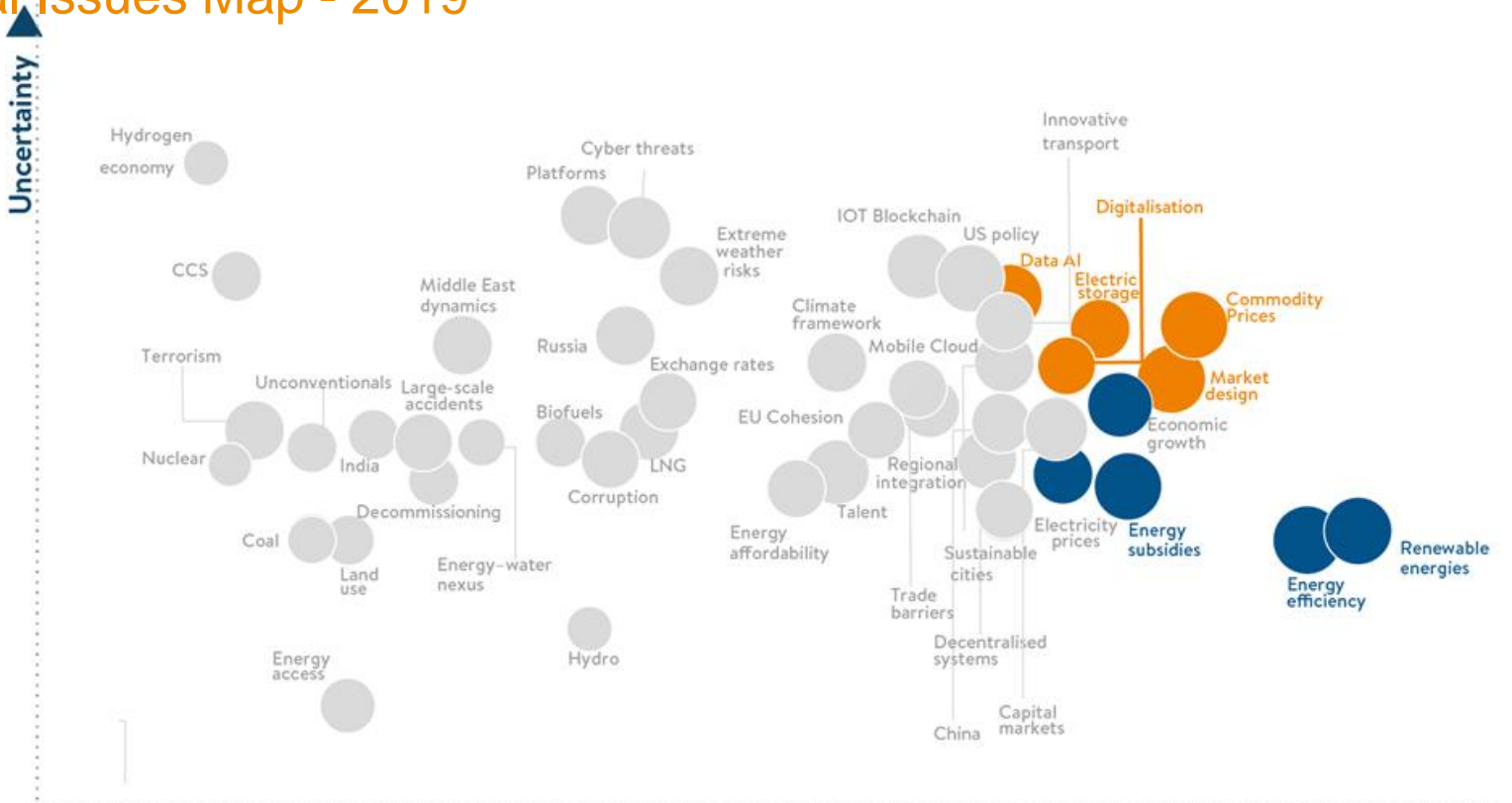
WORLD
ENERGY
COUNCIL

BusinessNZ
Energy Council

GLOBAL

World Energy Issues Monitor

Global Issues Map - 2019



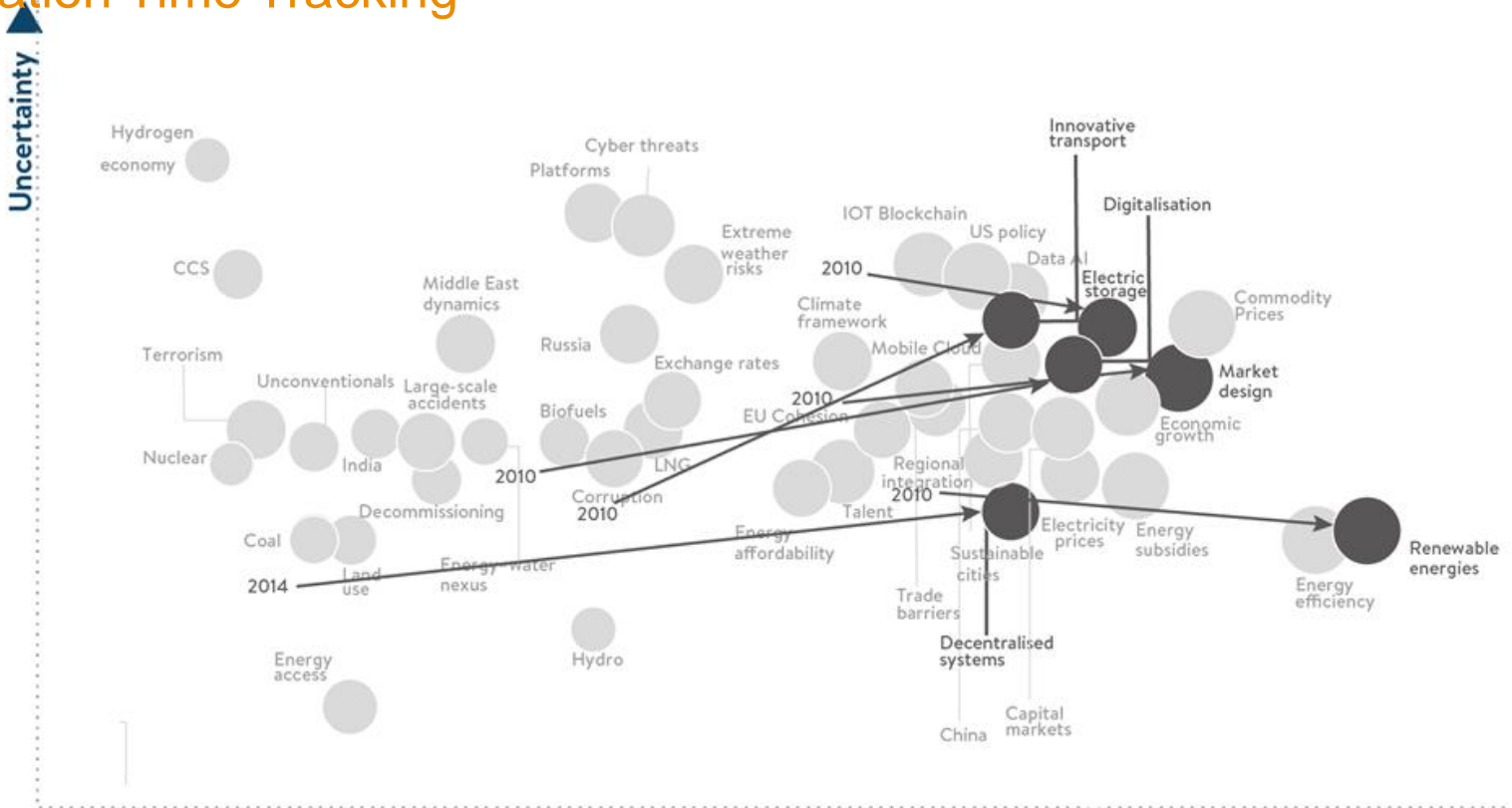
World Energy Issues Monitor 2019 - Global

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



Impact ▶

World Energy Issues Monitor Innovation Time Tracking



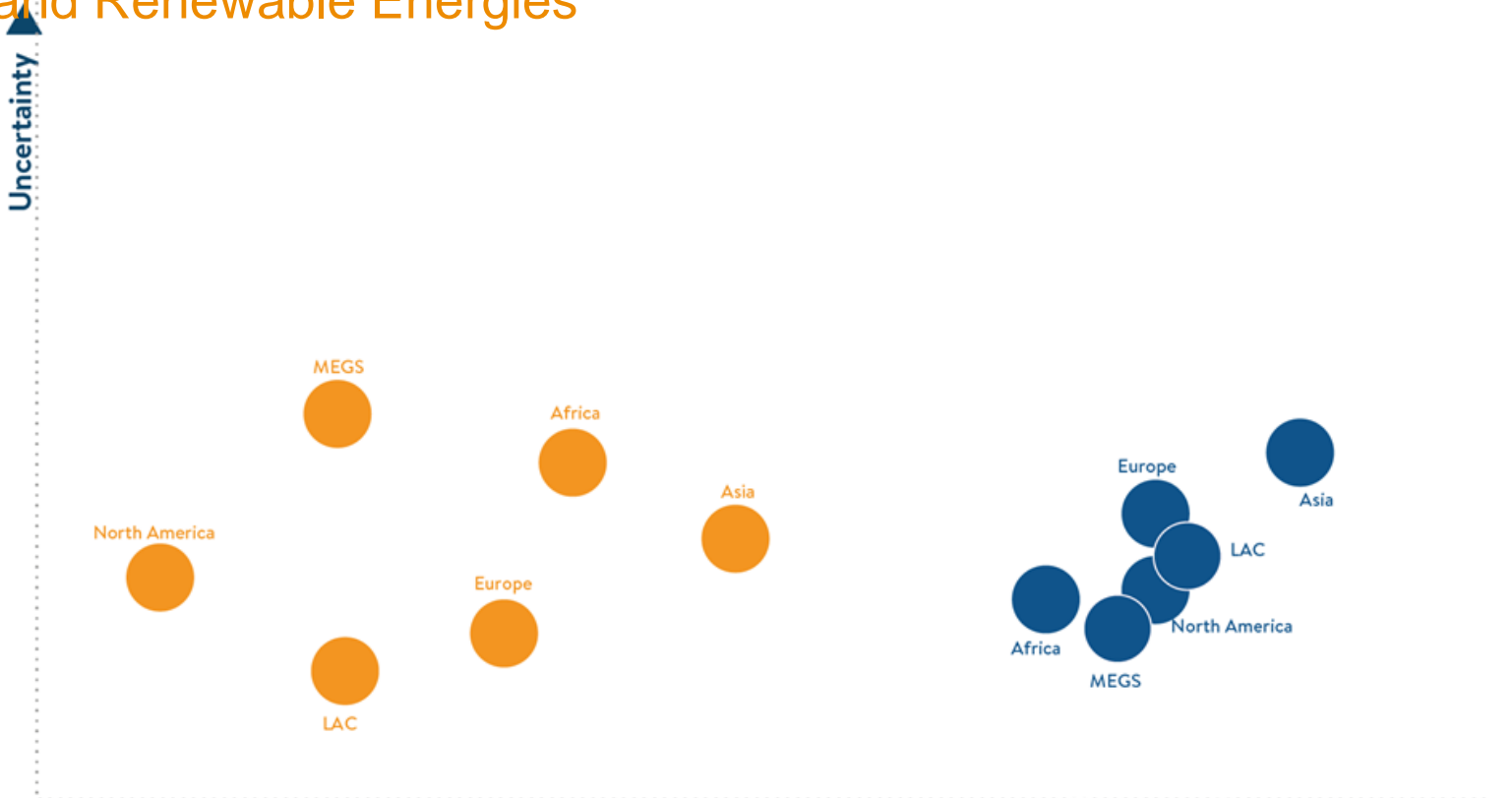
World Energy Issues Monitor 2019 - Global - Innovation

Impact ►

● Timetracking of select issues from 2010 to 2018

Less urgent ○ ○ ○ More urgent

World Energy Issues Monitor Coal and Renewable Energies



World Energy Issues Monitor 2019 - Tracking - Coal & Renewable Energies

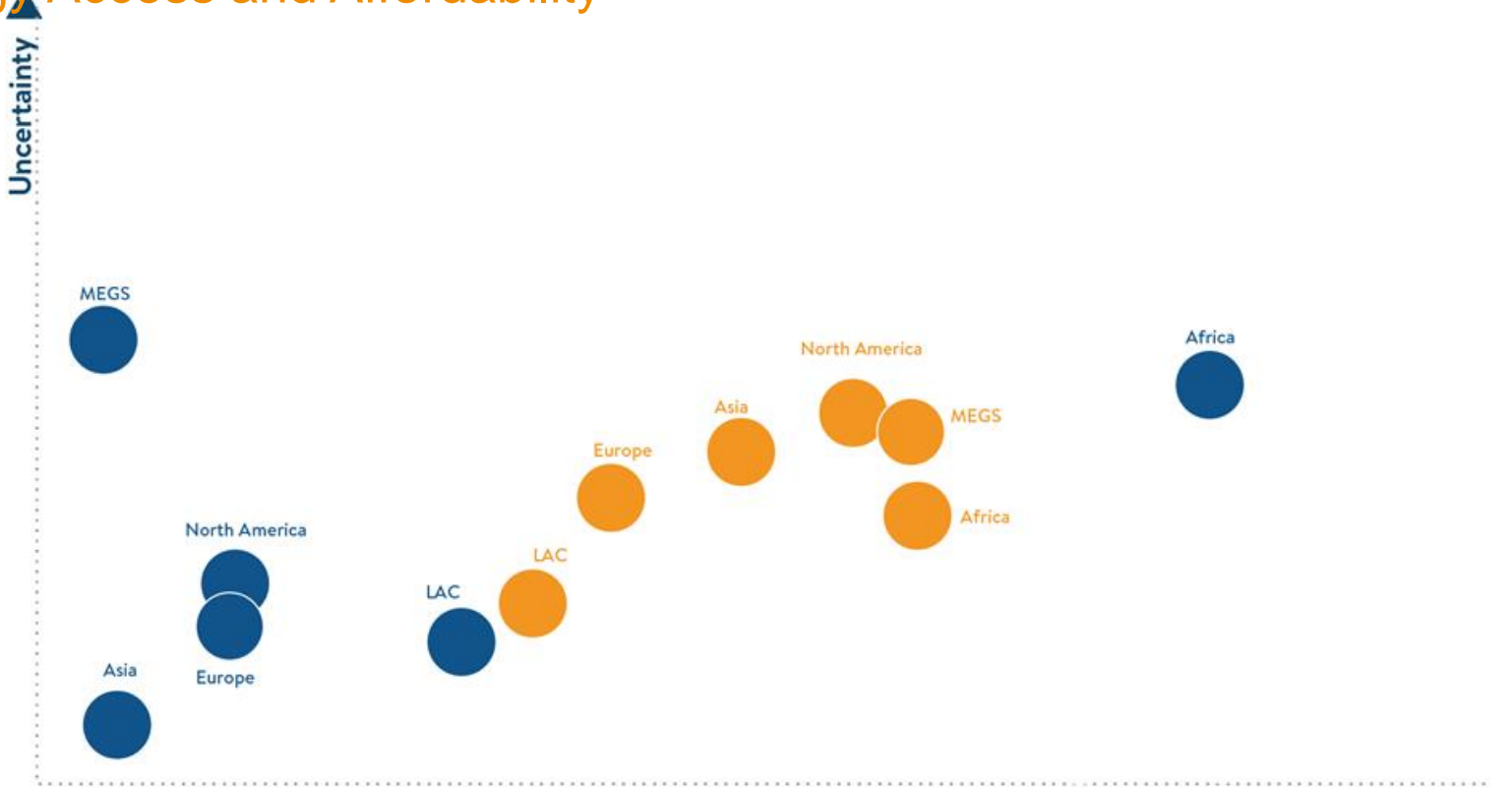
- Coal
- Renewable Energies

Less urgent More urgent

Impact

World Energy Issues Monitor

Energy Access and Affordability



World Energy Issues Monitor 2019 - Tracking - Energy Access & Affordability

- Energy Affordability
- Energy Access

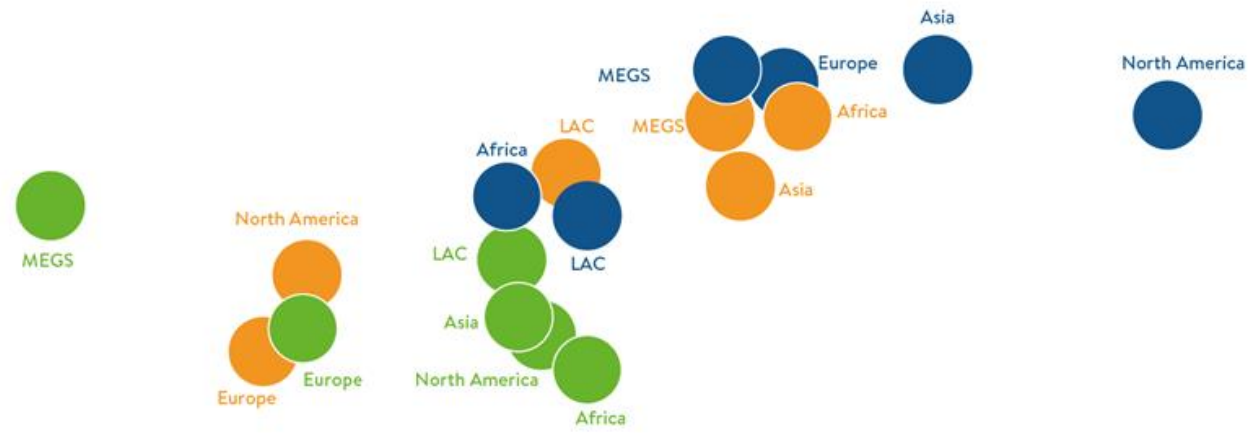
Less urgent More urgent

Impact

World Energy Issues Monitor

Biological Diversity Issues

Uncertainty



World Energy Issues Monitor 2019 - Tracking - Biological Diversity Issues

- Land Use
- Energy-Water Nexus
- Climate Framework

Less urgent More urgent

Impact

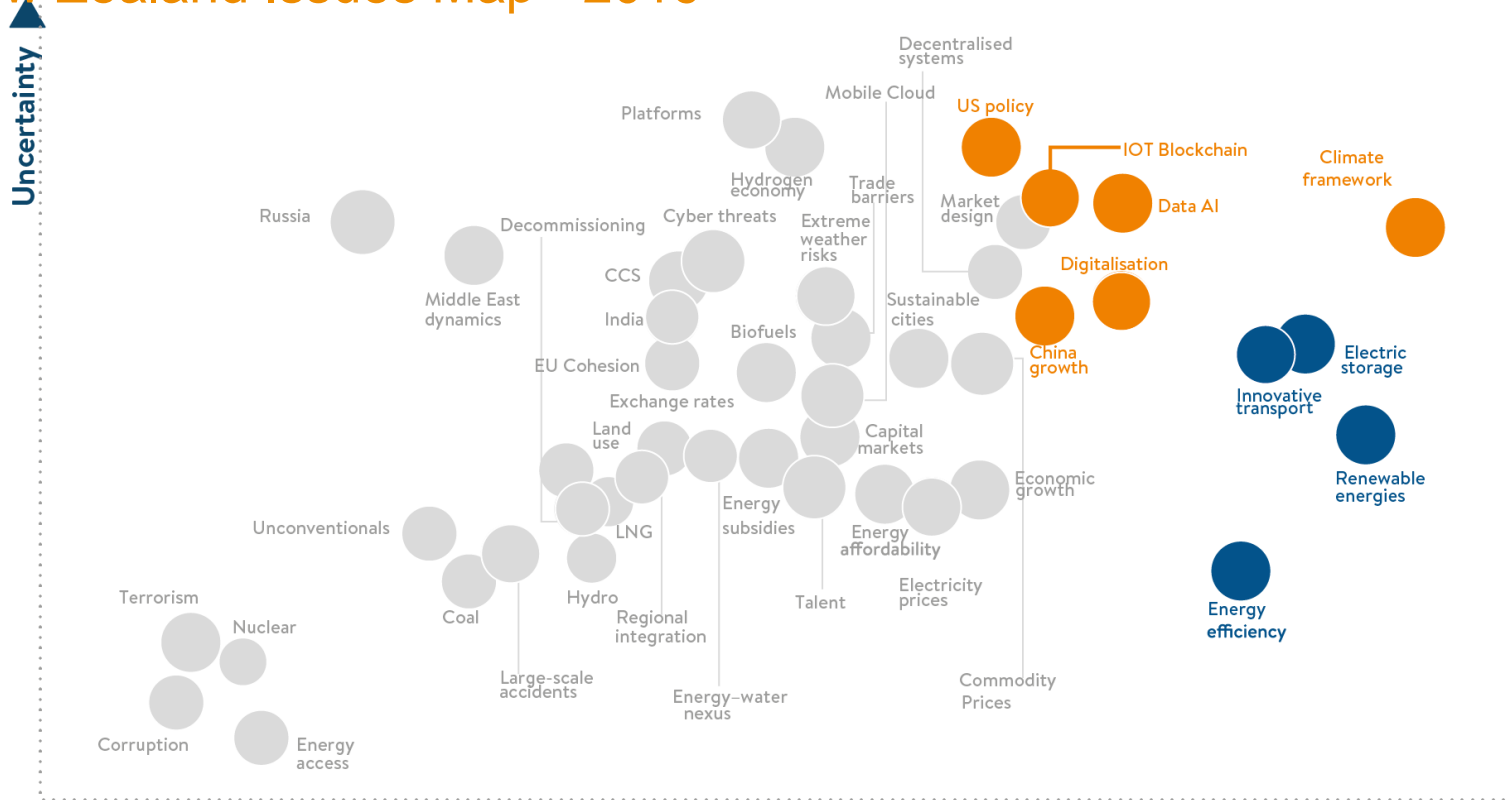
WORLD
ENERGY
COUNCIL

BusinessNZ
Energy Council

NEW ZEALAND

World Energy Issues Monitor

New Zealand Issues Map - 2019



World Energy Issues Monitor 2019 - New Zealand

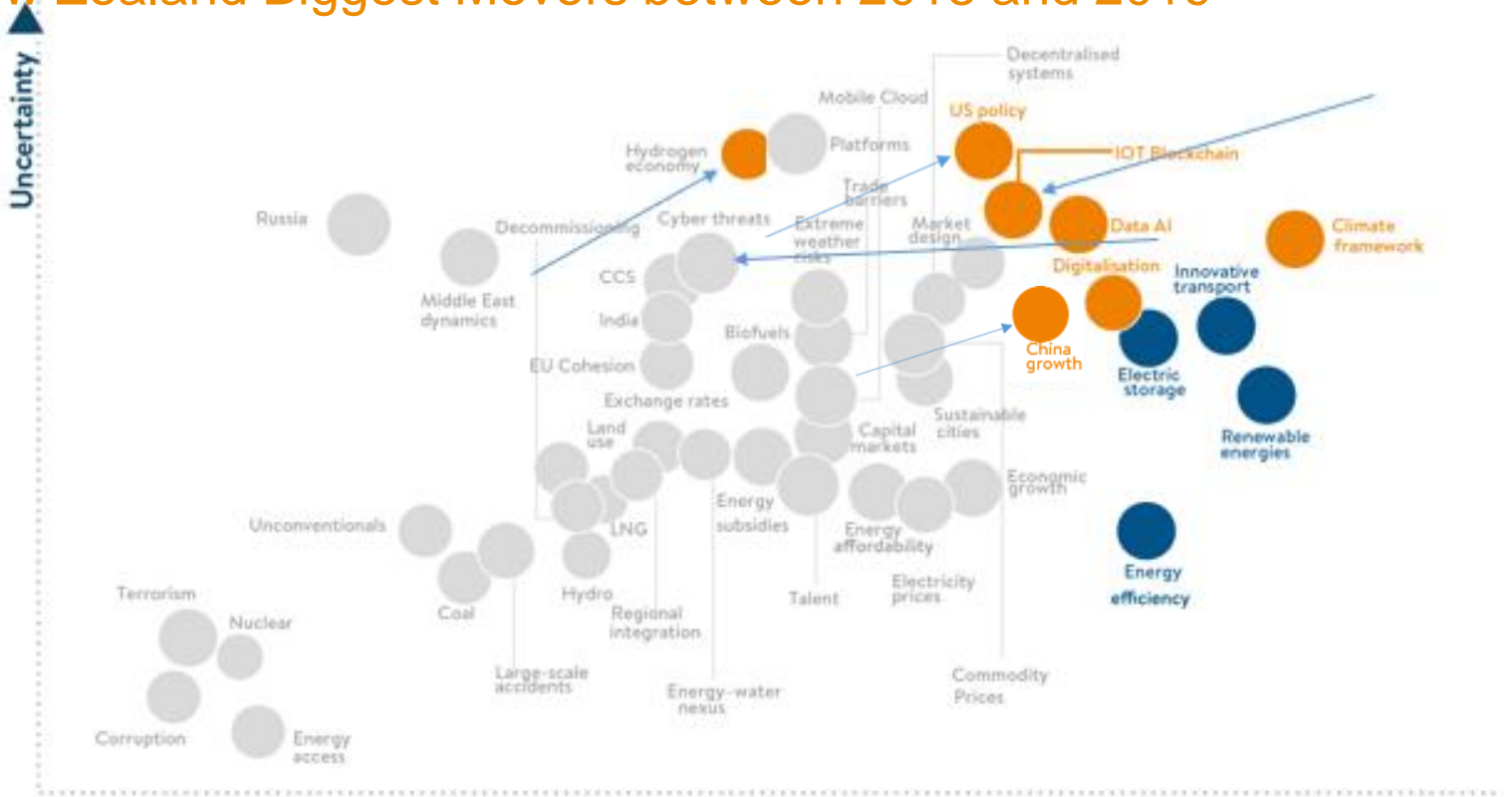
- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



Impact ►

World Energy Issues Monitor

New Zealand Biggest Movers between 2018 and 2019



World Energy Issues Monitor 2019 - New Zealand

● Critical uncertainties: what keeps energy leaders awake at night
● Action priorities: what keeps energy leaders busy at work

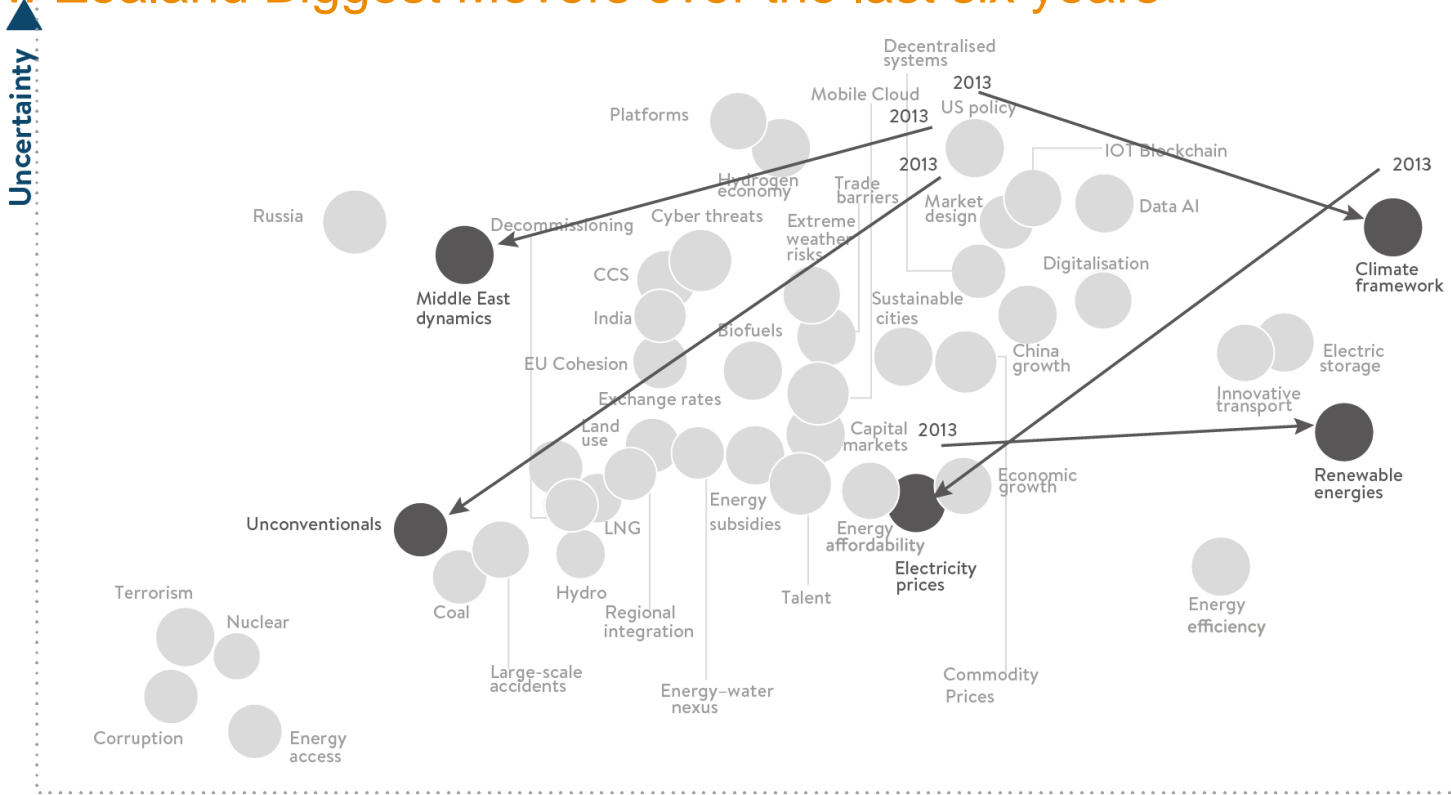
Less urgent

 More urgent

Impact ▶

World Energy Issues Monitor

New Zealand Biggest Movers over the last six years



World Energy Issues Monitor 2019 - New Zealand - Biggest Movers

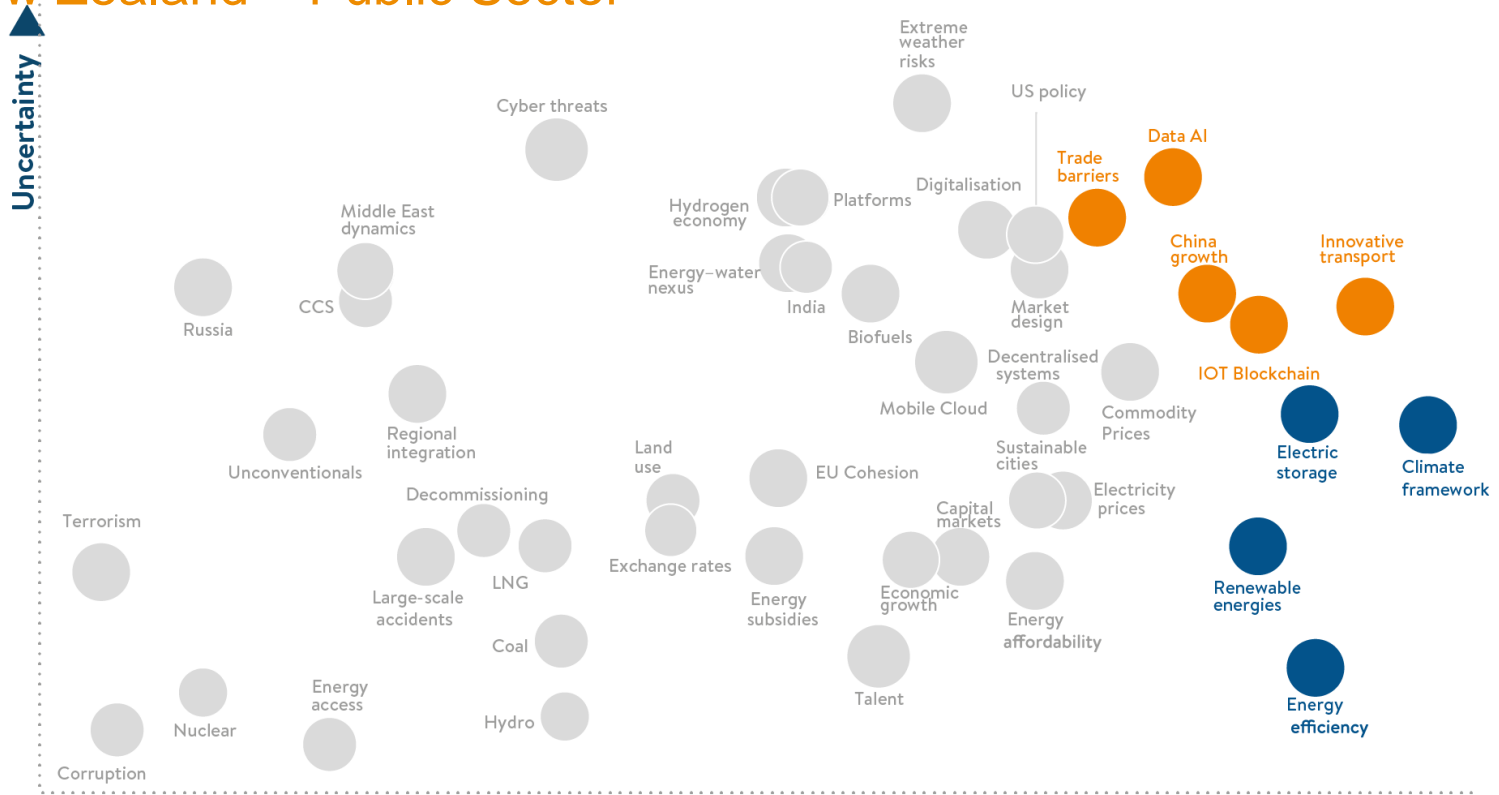
Impact ►

● Timetracking of select issues from 2013 to 2018

Less urgent ○○○ More urgent

World Energy Issues Monitor

New Zealand – Public Sector



World Energy Issues Monitor 2019 - New Zealand - Public Sector

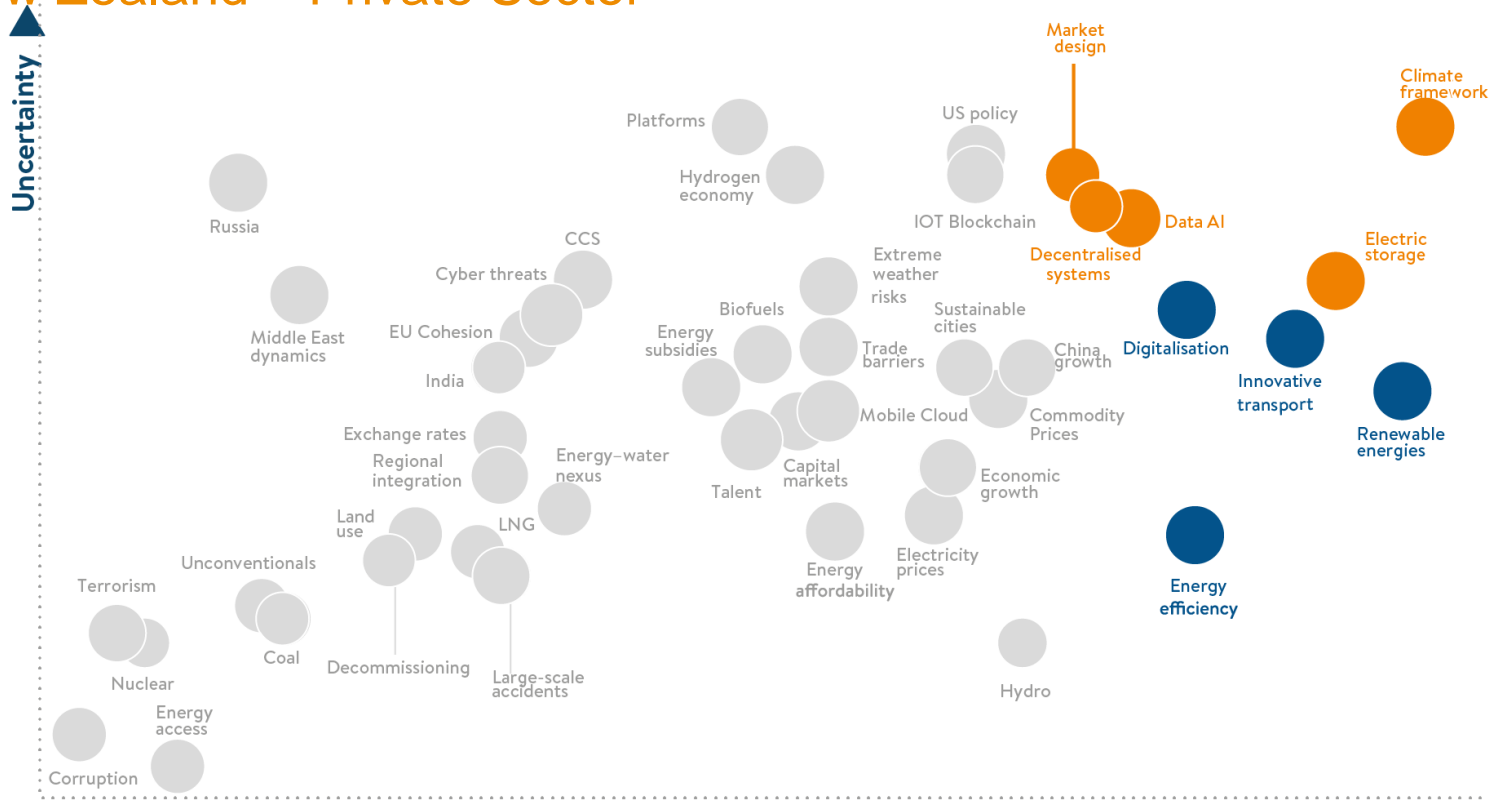


- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



World Energy Issues Monitor

New Zealand – Private Sector



World Energy Issues Monitor 2019 - New Zealand - Private Sector

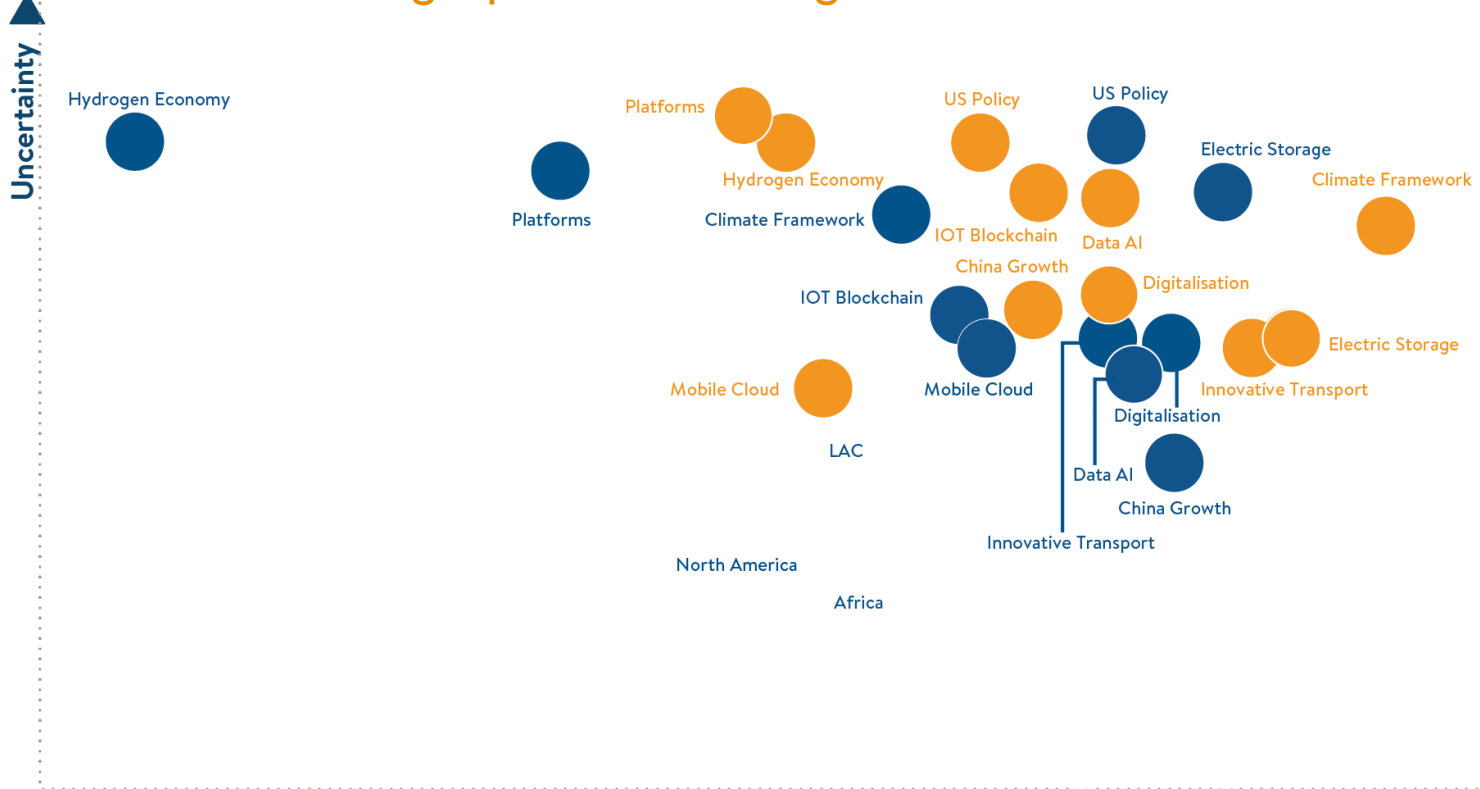
Impact ►

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



World Energy Issues Monitor

New Zealand – Geographical Tracking



World Energy Issues Monitor 2019 - Tracking - New Zealand

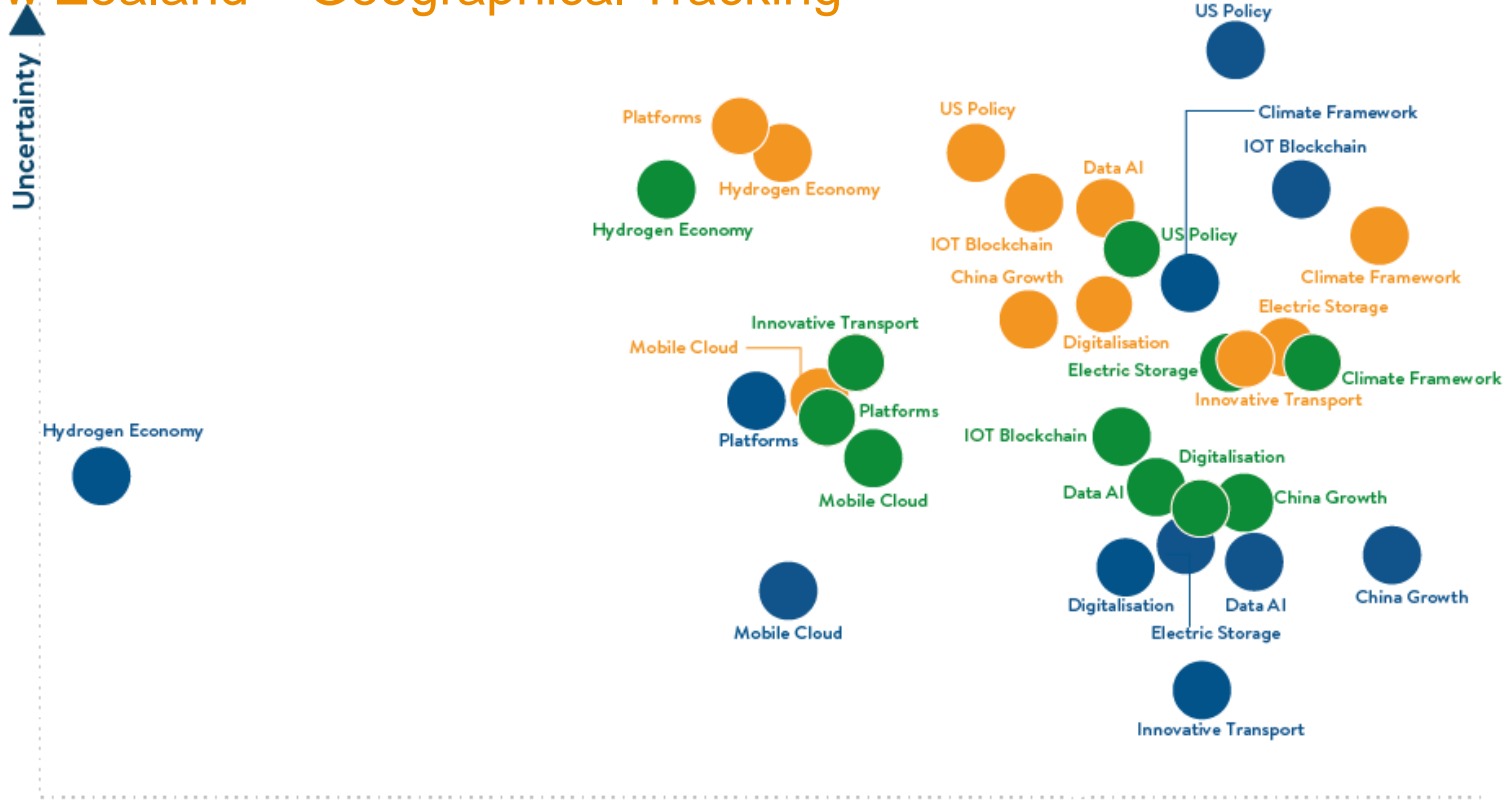
- Global
- New Zealand



Impact

World Energy Issues Monitor

New Zealand – Geographical Tracking



World Energy Issues Monitor 2019 - Tracking - New Zealand

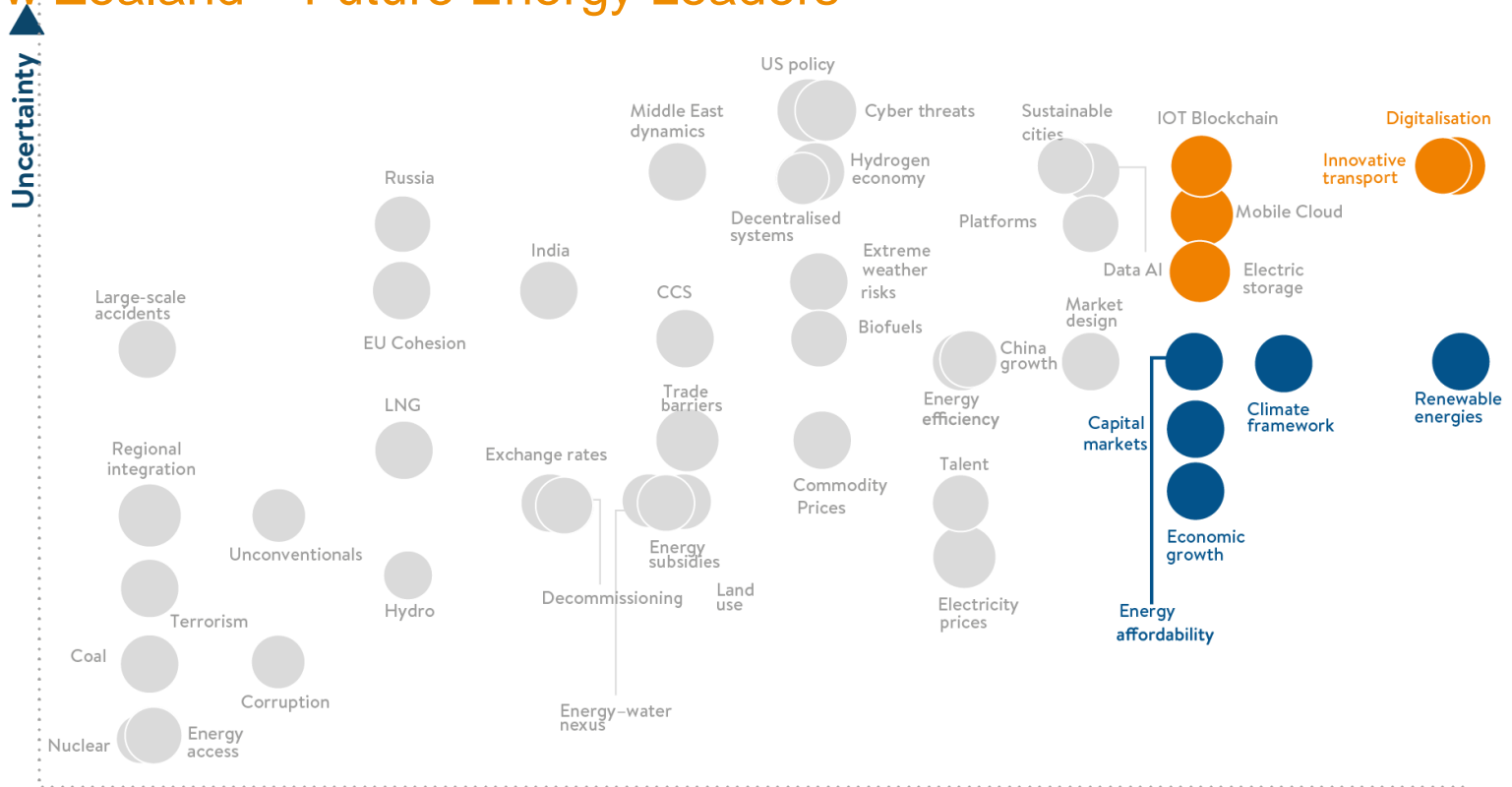
- China
- New Zealand
- Japan



Impact ►

World Energy Issues Monitor

New Zealand – Future Energy Leaders



World Energy Issues Monitor 2019 - New Zealand - FELs

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



Impact

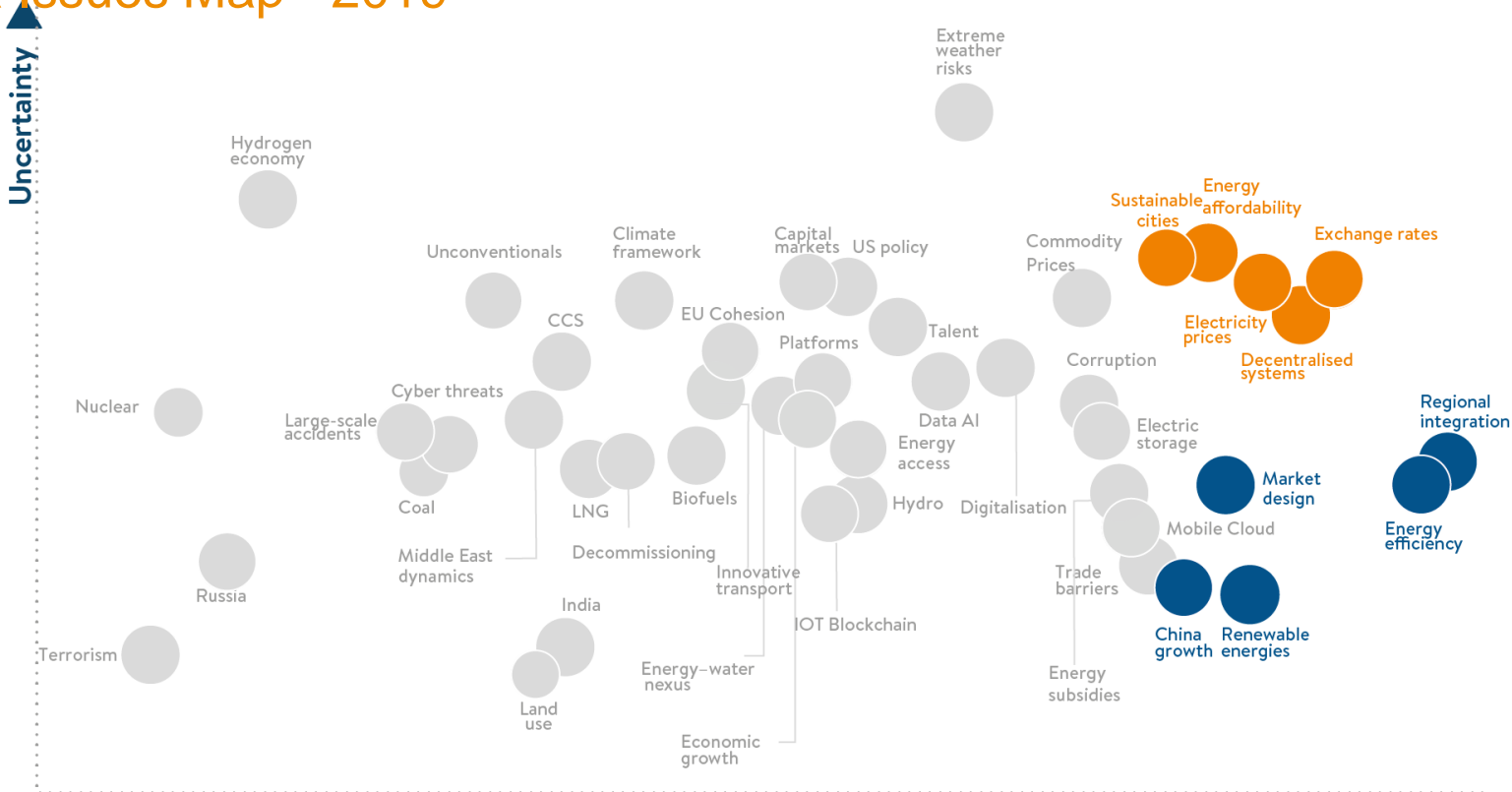
WORLD
ENERGY
COUNCIL

BusinessNZ
Energy Council

REGIONAL

World Energy Issues Monitor

Africa Issues Map - 2019



World Energy Issues Monitor 2019 - Africa

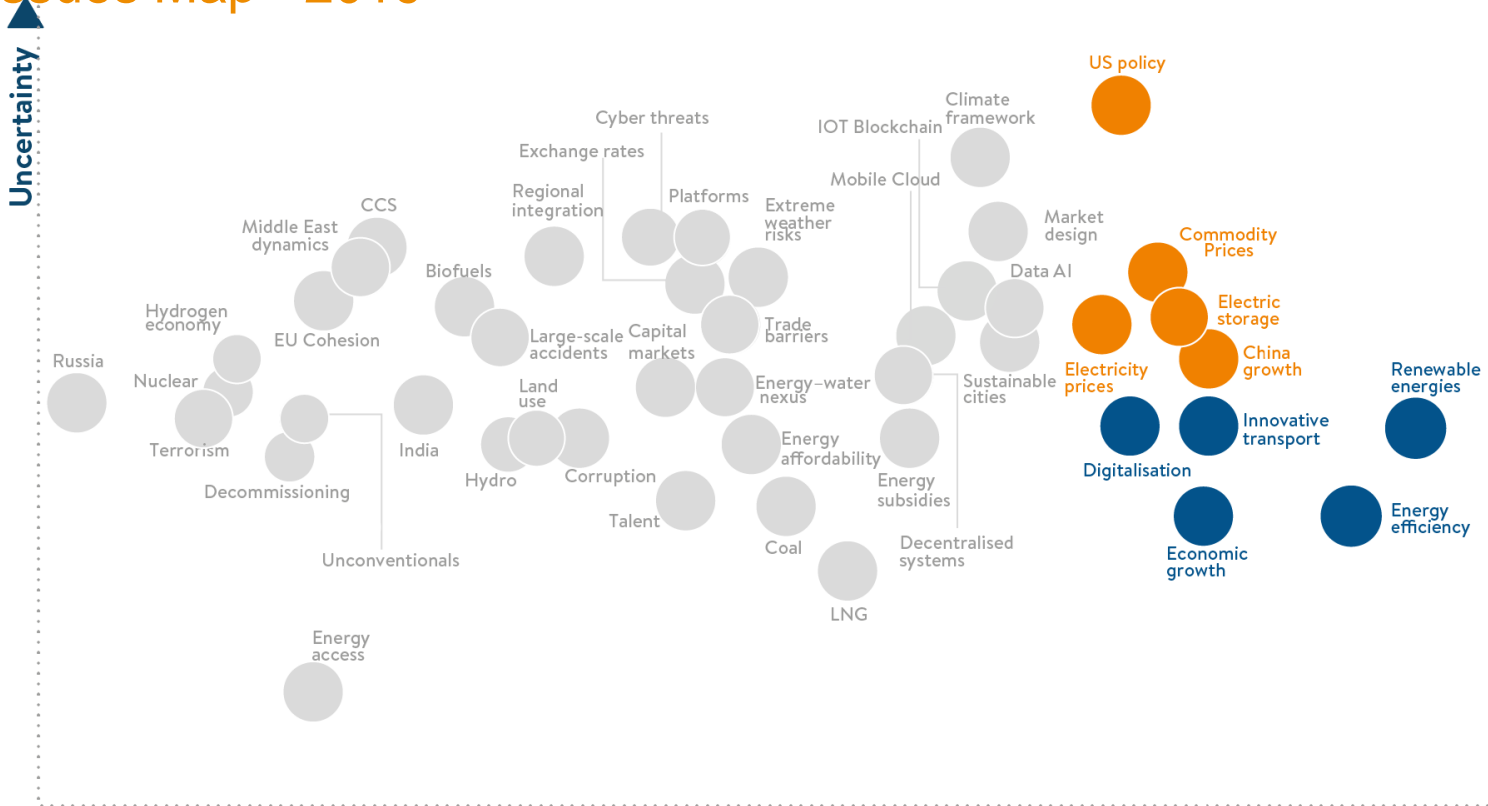
Impact ►

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



World Energy Issues Monitor

Asia Issues Map - 2019



World Energy Issues Monitor 2019 - Asia

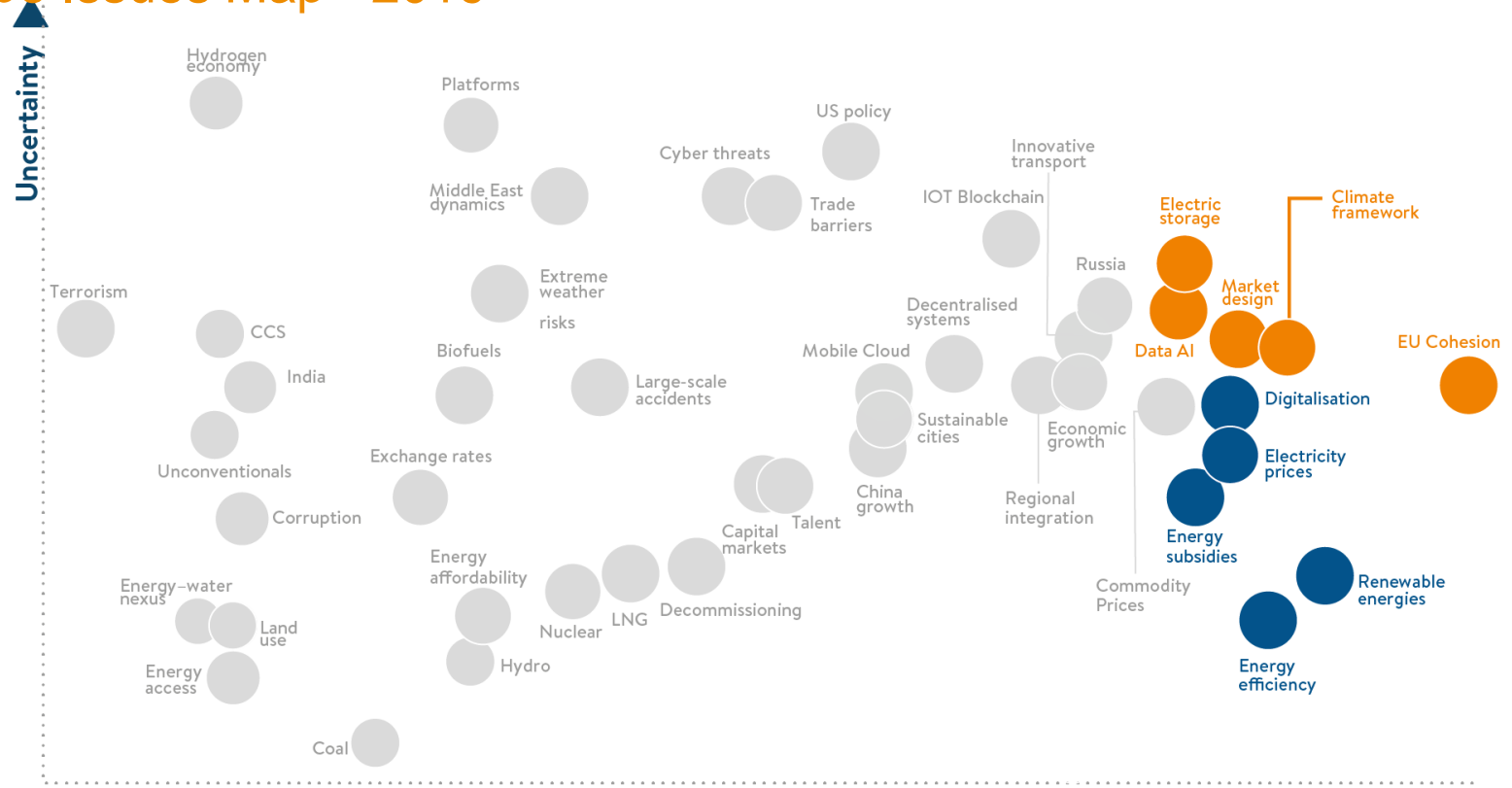
Impact ►

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



World Energy Issues Monitor

Europe Issues Map - 2019



World Energy Issues Monitor 2019 - Europe

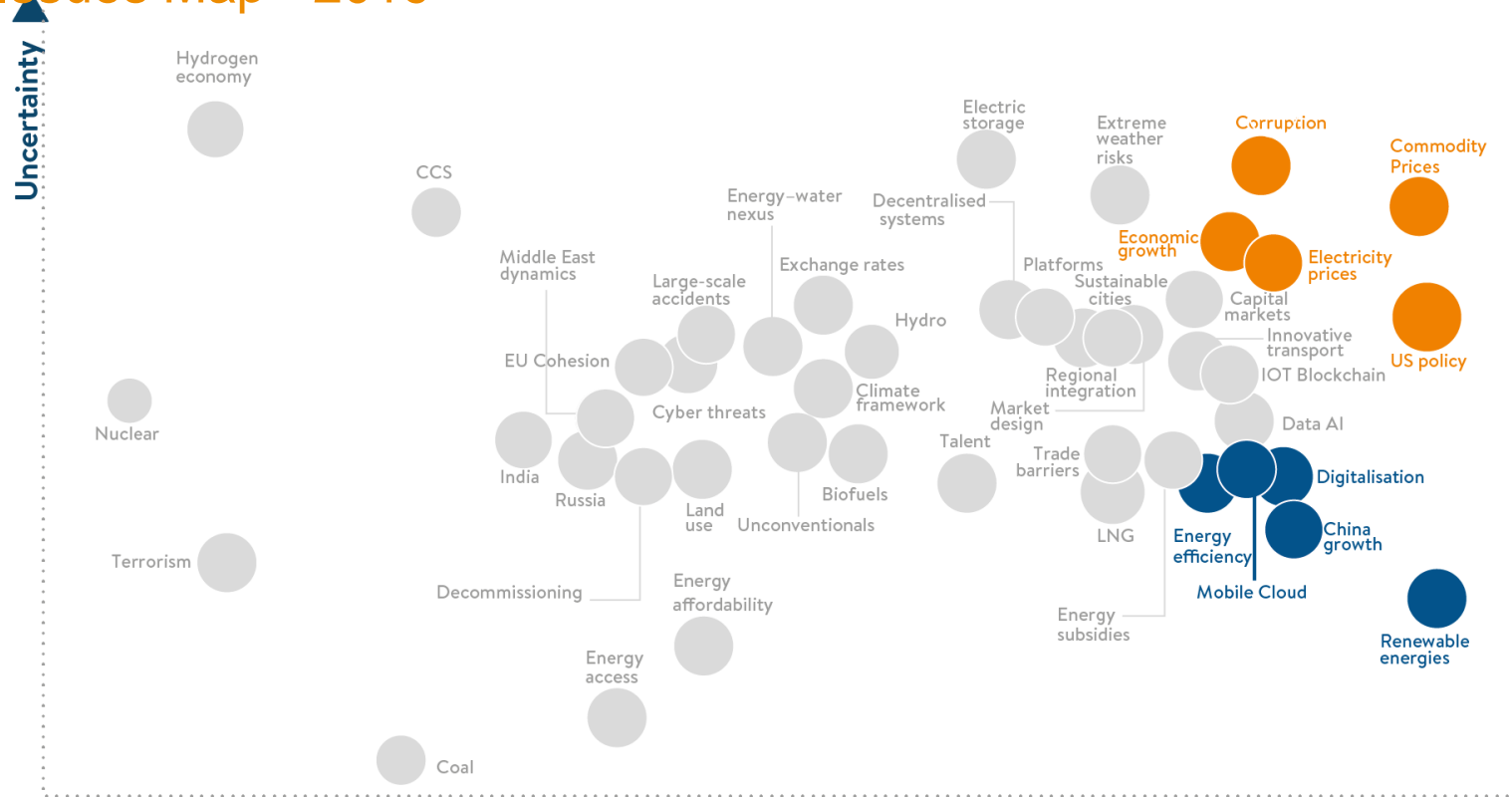
Impact ►

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



World Energy Issues Monitor

LAC Issues Map - 2019



World Energy Issues Monitor 2019 - LAC

● Critical uncertainties: what keeps energy leaders awake at night
● Action priorities: what keeps energy leaders busy at work

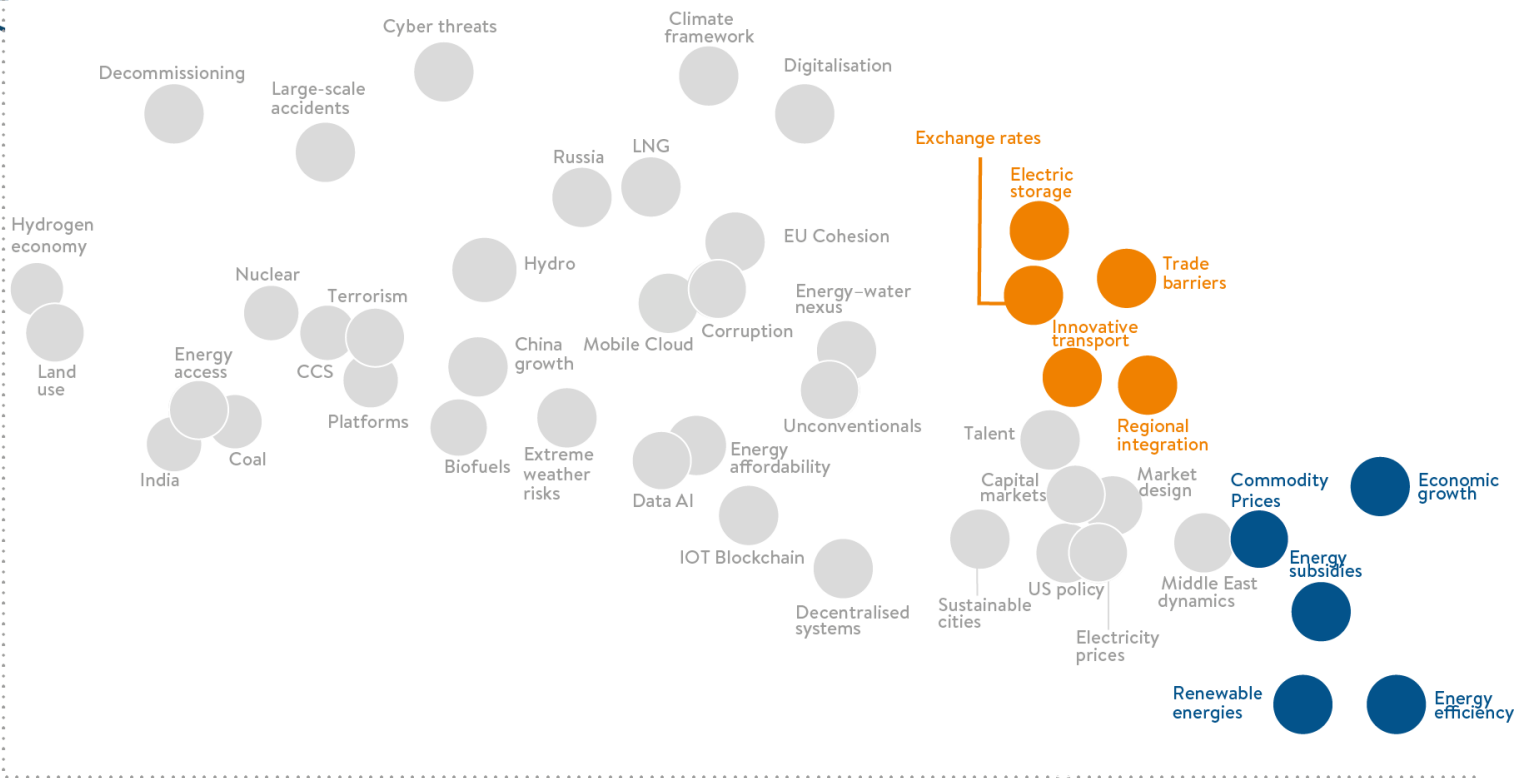
Less urgent More urgent

Impact

World Energy Issues Monitor

MEGS Issues Map - 2019

Uncertainty



World Energy Issues Monitor 2019 - Middle East & Gulf States

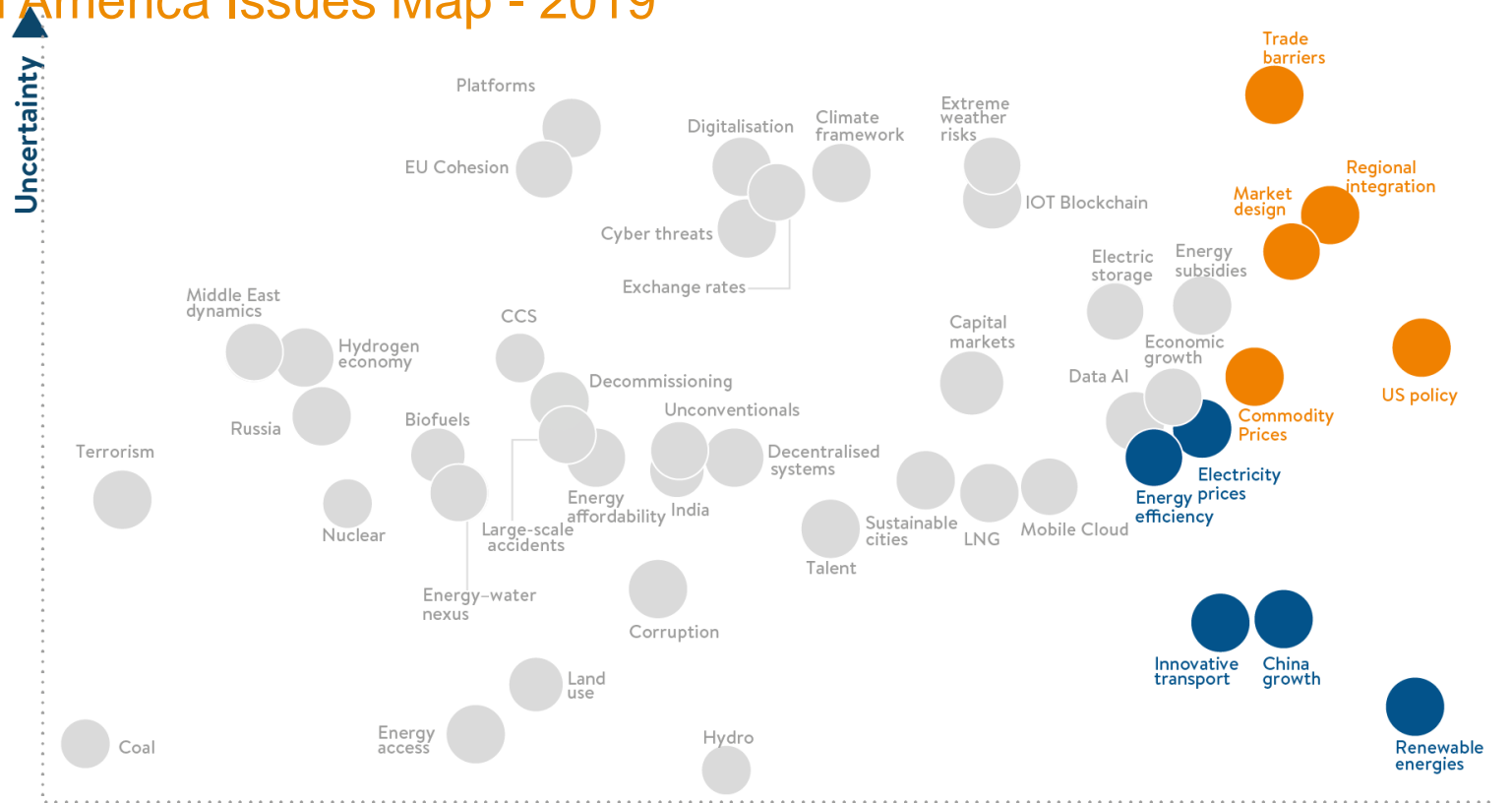
Impact

- Critical uncertainties: what keeps energy leaders awake at night
- Action priorities: what keeps energy leaders busy at work



World Energy Issues Monitor

North America Issues Map - 2019



World Energy Issues Monitor 2019 - North America

● Critical uncertainties: what keeps energy leaders awake at night
● Action priorities: what keeps energy leaders busy at work

Less urgent More urgent

Impact

WORLD
ENERGY
COUNCIL

BusinessNZ
Energy Council

Thank you

www.bec.org.nz | [@BusNZEnergy](https://twitter.com/BusNZEnergy)