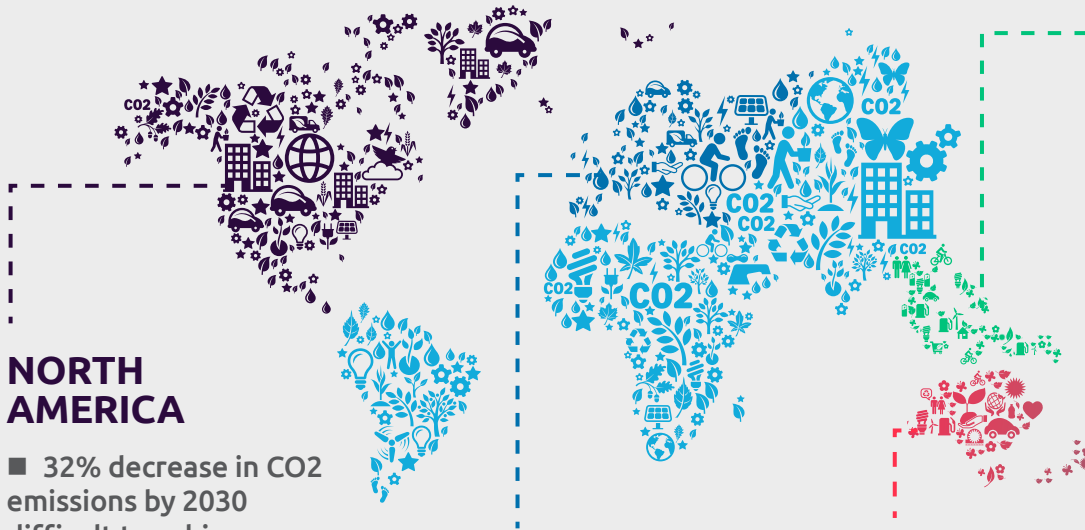


World Energy Markets Observatory



NORTH AMERICA

- 32% decrease in CO2 emissions by 2030 difficult to achieve

- Uncertainty on the future of climate action in North America

- Coal may become the leading source of electricity generation by 2019

- Micro grids and distributed energy resources making a comeback

- Maturation of the IoT and low-cost powerful sensors

EUROPE

- The CO2 target will be surpassed in 2020

- Renewables are becoming cost competitive

- Gas and electricity retail prices falling but moderately (residential)

- Digital Operations - the #1 priority

AUSTRALIA

- Climate target would require emissions to reach around 434 million tonnes by 2030

- Increasing shift toward wind and solar + a resurgent hydro sector

- Rising wholesale energy prices are affecting retail prices

- Emerging focal point for the global battery storage market

- Experimentation with blockchain and its application in energy distribution and grid management

SOUTH EAST ASIA

- Most of the countries are expected to reduce their CO2 emissions

- SEA markets present great variation between tariffs & subsidies schemes

- Countries are turning to deregulation to improve operational efficiency

- Rooftop solar panels and small wind turbines becoming more accessible

- Digitization has gained traction especially in Singapore, Philippines, and Vietnam