

# WE MO 2019

## World Energy Markets Observatory

Climate goals at risk as global energy demand rises

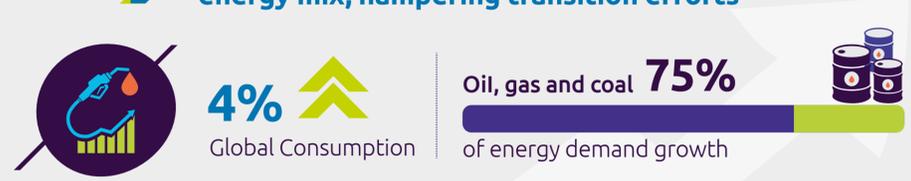
The 21<sup>st</sup>

annual World Energy Markets Observatory (WEMO) reveals a world struggling to balance the the desire for **continued economic growth** with the need to take deliberate and drastic steps against climate change.

### 1 A growing world economy is driving energy consumption



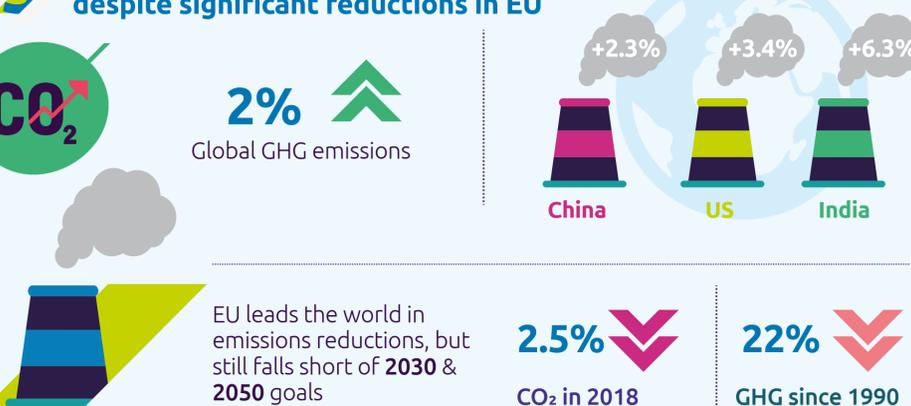
### 2 Fossil fuels still dominate much of the worldwide energy mix, hampering transition efforts



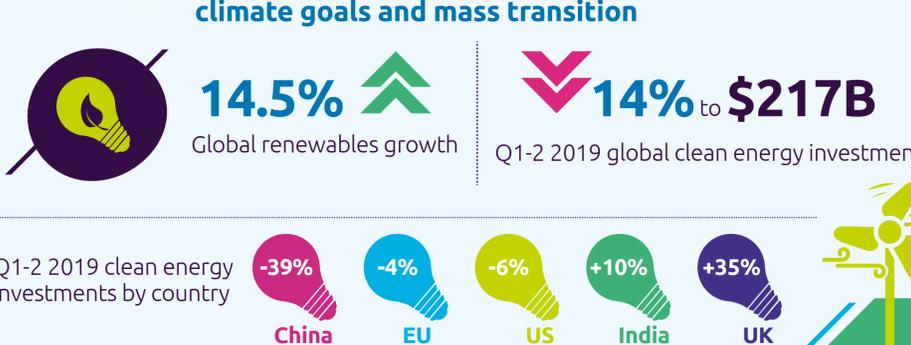
The developing world remains dependent on coal, exacerbating climate-related vulnerability



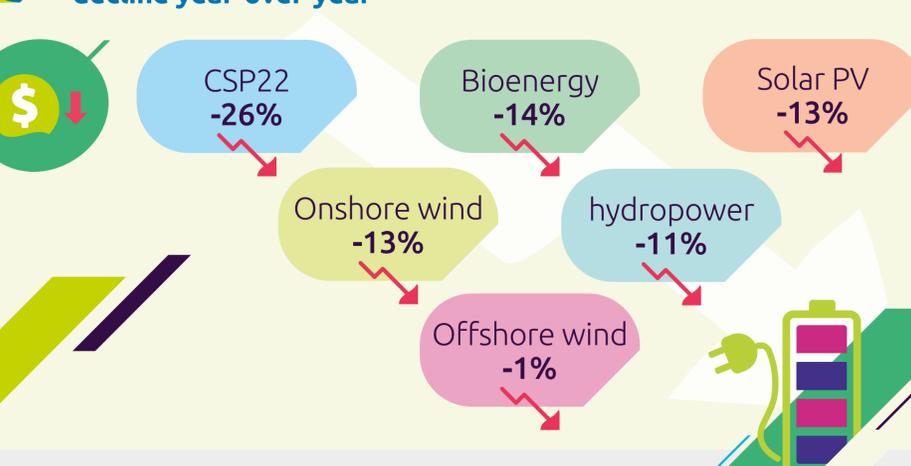
### 3 Global emissions continue to rise, despite significant reductions in EU



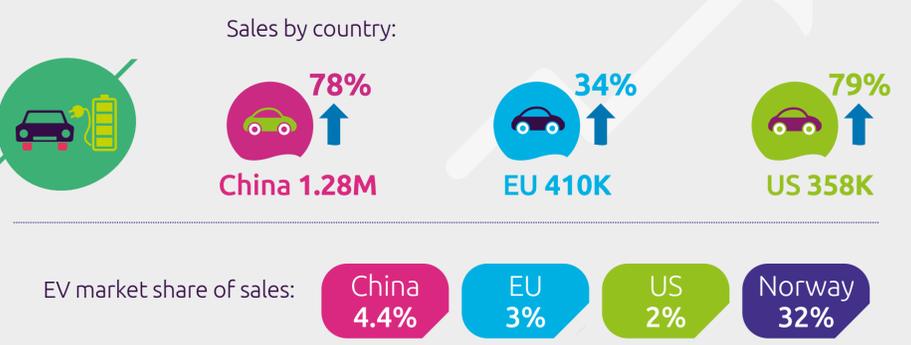
### 4 Renewables are the fastest growing energy source, but momentum has dipped—threatening long-term climate goals and mass transition



### 5 Global renewable energy costs continue to decline year-over-year



### 6 Global Electric Vehicle (EV) adoption shows steady growth



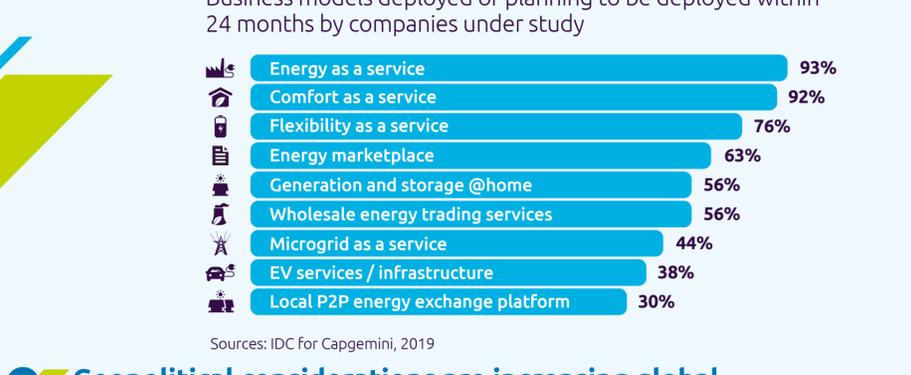
### 7 Continuous advancement in existing technology will drive incremental gains over the next two decades in the energy sector



### 8 Intelligent automation holds enormous potential for the utility industry, though few organizations have deployed the technology at scale



### 9 Traditional business models in the energy sector are under pressure, spurring a global shift to services



### 10 Geopolitical considerations are increasing global energy market volatility



#### About WEMO

The World Energy Markets Observatory (WEMO) is Capgemini's annual thought leadership and research report that tracks the development and transformation of electricity and gas markets in Europe, North America, Australia, Southeast Asia, India and China. Now in its 21st year, WEMO examines the following topics: climate change & regulatory policies; energy transition; infrastructure & adequacy of supply; supply & final customer; transformation; and financials.