

Southeast Asia

World Energy Markets Observatory 2018/2019

Southeast Asia is moving towards a clean energy system, but high energy demand and cost pressures are slowing progress.

In this Observatory, Southeast Asia (SEA) refers to a region covering the following six countries:



Key Trends

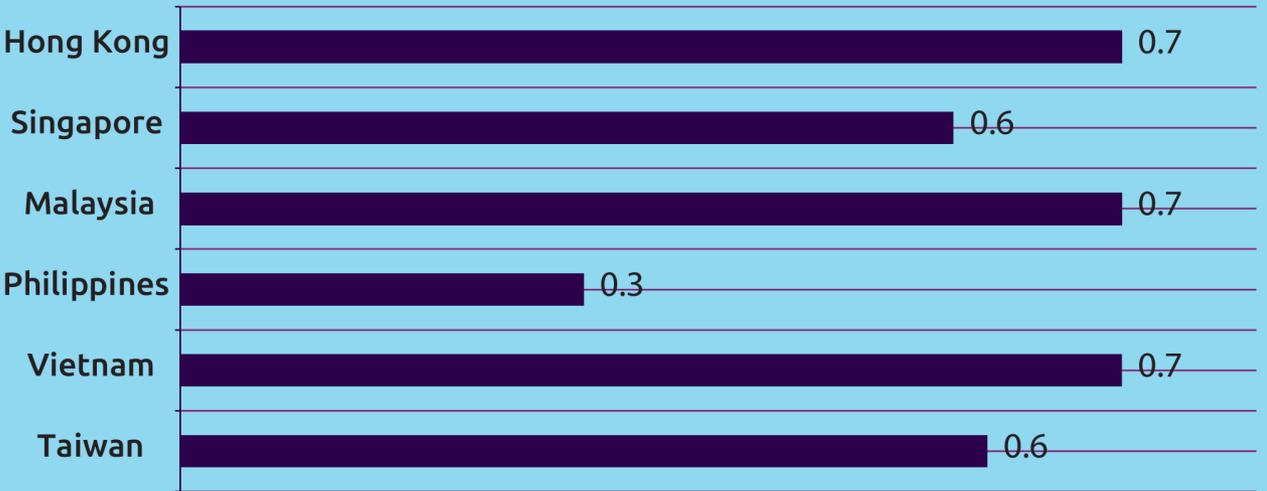


- Renewables and high-efficiency coal, followed by gas, are expected to lead the future of energy production.
- Southeast Asia's six major countries accounted for 3.7% of total global emissions in 2017 (33,444 Mt CO₂).
- Renewable energy investment in the power sector exceeded US\$3.5 billion in 2017.
- Electricity accounts for the largest share of the increase in final consumption.
- A large increase in gas infrastructure is expected to increase flexibility in Southeast Asian natural gas markets.
- Blockchain technology is paving the way towards conceptual models for faster adoption of renewable energy.

Investment in renewable energy in the power sector exceeded US\$3.5 billion in 2017



Total investment in renewable energy represented about 1.2% of global investment in renewable energy for SEA



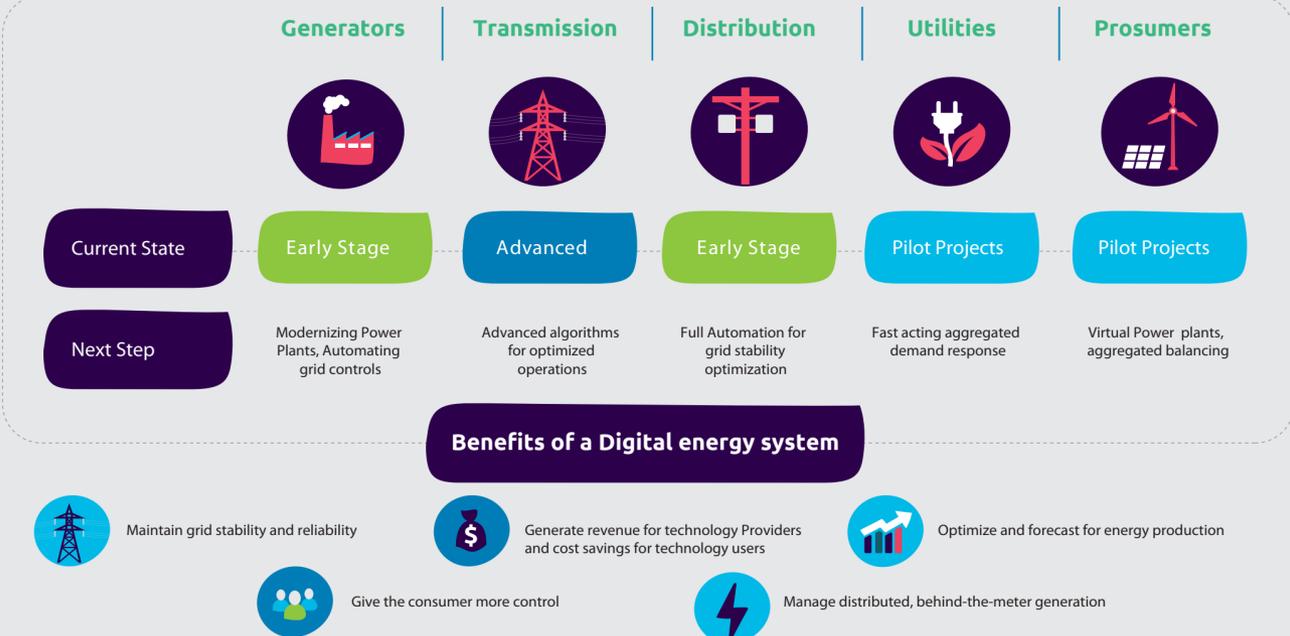
2017 Investment in Renewable Energy (US\$ Billion)

Digitalization: A new era in energy



The market for digitalization in the energy sector is set to grow to US\$64 billion by 2025, enabled by advances in **areas like data analytics, artificial intelligence, and blockchain.**

Current state of digitalization of the energy value chain



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www.capgemini.com/WEMO