

APERC Workshop at EWG 45  
18 March 2013

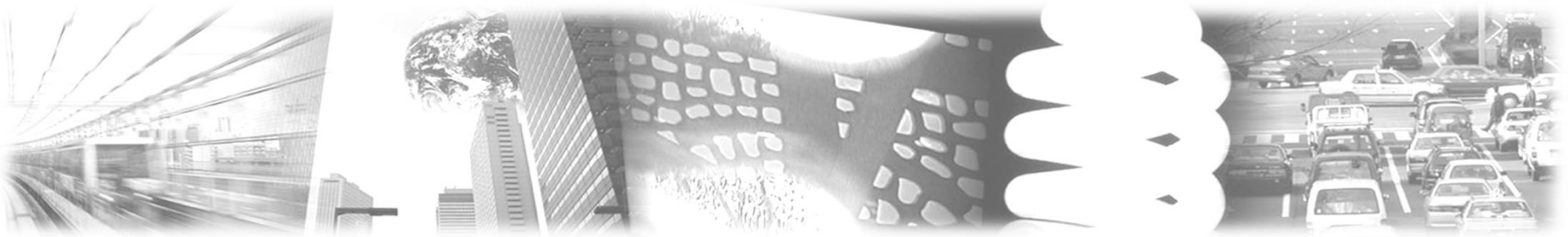
## **2. APEC Energy Demand and Supply Outlook 5<sup>th</sup> Edition and Way Forward**

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# Outline

- Outlook 5th Edition – A Final Update
- The Big Picture: The Role of APERC's Research
- Outlook 6th Edition: What Should Be Included?



# Outlook 5th Edition – A Final Update

# APEC Energy Outlook 5<sup>th</sup> Edition



**APEC**

## Energy Demand and Supply Outlook 5th Edition

February 2013



**APERC**  
Asia Pacific Energy Research Centre

- The Outlook 5<sup>th</sup> Edition was published last month!
- Hard copies (both volumes) are available in this room
- Also available on new APERC website <http://aperc.ieej.or.jp/>



## Also Available for Downloading

- Supplemental chapter on Energy Investments
- Detailed tables of results for each case (demo)



# Key Findings – See Chapter 1

1. APEC's energy intensity goals will probably be met under business-as-usual
2. Nuclear development slows down, but not by much
3. Gas production growth speeds up, and could challenge coal
4. New Renewable Energy (NRE) goes mainstream
5. Big opportunities to improve efficiency, especially in transportation through better urban planning and improving the efficiency of the vehicle fleet.
6. Oil security remains a major threat to the economies of the APEC region
7. Business-as-usual is still environmentally unsustainable.

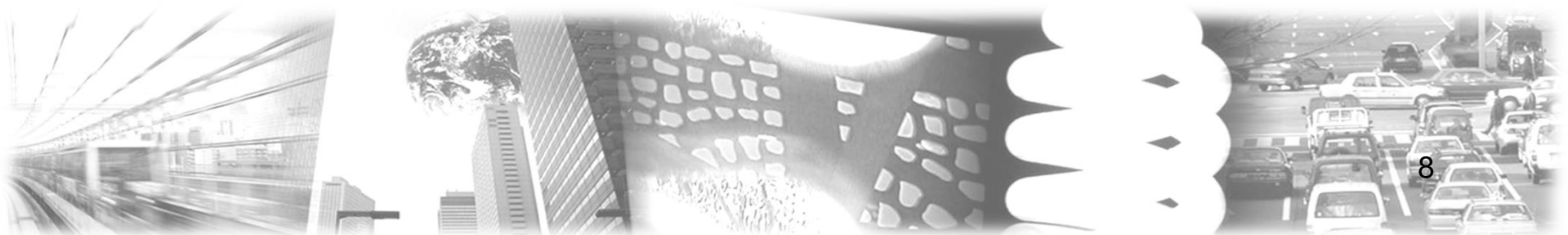


# Cases Examined

- “Business As Usual” (BAU) – Assumes existing policy continues, including policies in process of implementation (legislation already approved)
- Three Alternative Cases:
  - High Gas Case
  - Better Urban Planning
  - Virtual Clean Car Race



# The Big Picture: The Role of APERC's Research







# Some Historical Background

- Prior to 2009, APERC's primary focus was on research
  - In addition to the *Outlook* (3 editions by then) and *Overview*, APERC produced a series of one-off research reports on various topics
- In 2008, APERC was asked to coordinate the first Peer Review of Energy Efficiency (PREE) for New Zealand
  - This was the first of APERC's cooperative projects
  - Feedback was good, and ministers soon instructed APERC to coordinate more PREE's, as well as a variety of other cooperative efforts
  - These cooperative efforts have been well-regarded by participants, as evidenced by the high rankings they have consistently received in the EWG's funding priority polls



# So What Became of APERC's Research?

- In 2009, APERC made a conscious decision that we should focus more on cooperative projects, rather than research reports
  - We felt that APEC economies needed one-on-one real-world advice on improving energy efficiency and promoting low-carbon energy much more than they needed research reports
  - Evidence that APERC's research was having an impact on real-world decisions was lacking
  - Because APERC researchers are generally recruited through economy governments, they tend to be well-qualified to work directly with economy government officials. On the other hand, APERC researchers with the skills needed to do cutting-edge research have been unusual.



# The Research That Continued

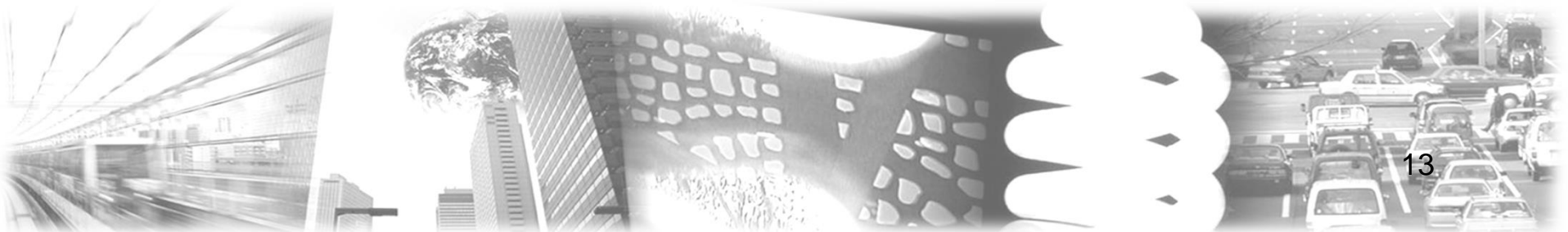
- The Past: APEC Energy Statistics (actually IEEJ/EDMC)
- The Present: APEC Energy Overview
- The Future: Outlook, our flagship research project
- Compendium of Energy Efficiency Policies of APEC Economies
- Research in support of cooperative projects, especially CEEDS:
  - Building and appliance energy efficiency standards
  - Better urban planning
  - ESCO's
- Research in support of EWG decision making:
  - APEC energy intensity improvement goal
  - *Pathways* report dealing with meeting climate change challenges



# The Big Picture: Summary

- How can APERC best leverage its (limited) resources to produce value for APEC economies?
  - Continue emphasis on cooperative projects, but focus resources where returns are highest
  - Continue APERC's regular publications: *Outlook*, *Overview*, *APEC Energy Statistics*, and *Compendium*
  - Use *Outlook* as a vehicle to introduce some new ideas into APEC's thinking


# Outlook 6th Edition: What Should Be Included?





# The Outlook Challenge

- APERC is not the only organization that publishes an international energy outlook; others include IEA, USEIA, IEEJ, ASEAN, ADB, OPEC, oil companies (Exxon, BP), more
- The key findings and BAU projections of these outlooks tend to be very similar
- If APERC is going to continue to do an Outlook, how can it have value in this environment?



# What Can Be Unique About APERC's Outlook?

1. Can give more detailed attention to specific APEC economies, especially the smaller ones
2. Can focus on APEC-specific topics (energy intensity improvements, fossil-fuel subsidy rationalization, APEC regional trade)
3. Can have something original to say (5<sup>th</sup> Edition addressed opportunities in urban planning, alternative vehicles including hyper-cars, and removing barriers to natural gas, 'sidebars')





## What Are Some Original Topics the Outlook 6<sup>th</sup> Edition Might Address?

- Opportunities in distributed combined heat and power (co-generation)
- Opportunities in electricity trade in the APEC region
- Opportunities in geothermal energy
- Opportunities in telecommuting
- Opportunities in new approaches to climate change agreements
- Other ideas?

# Questions and Discussion

