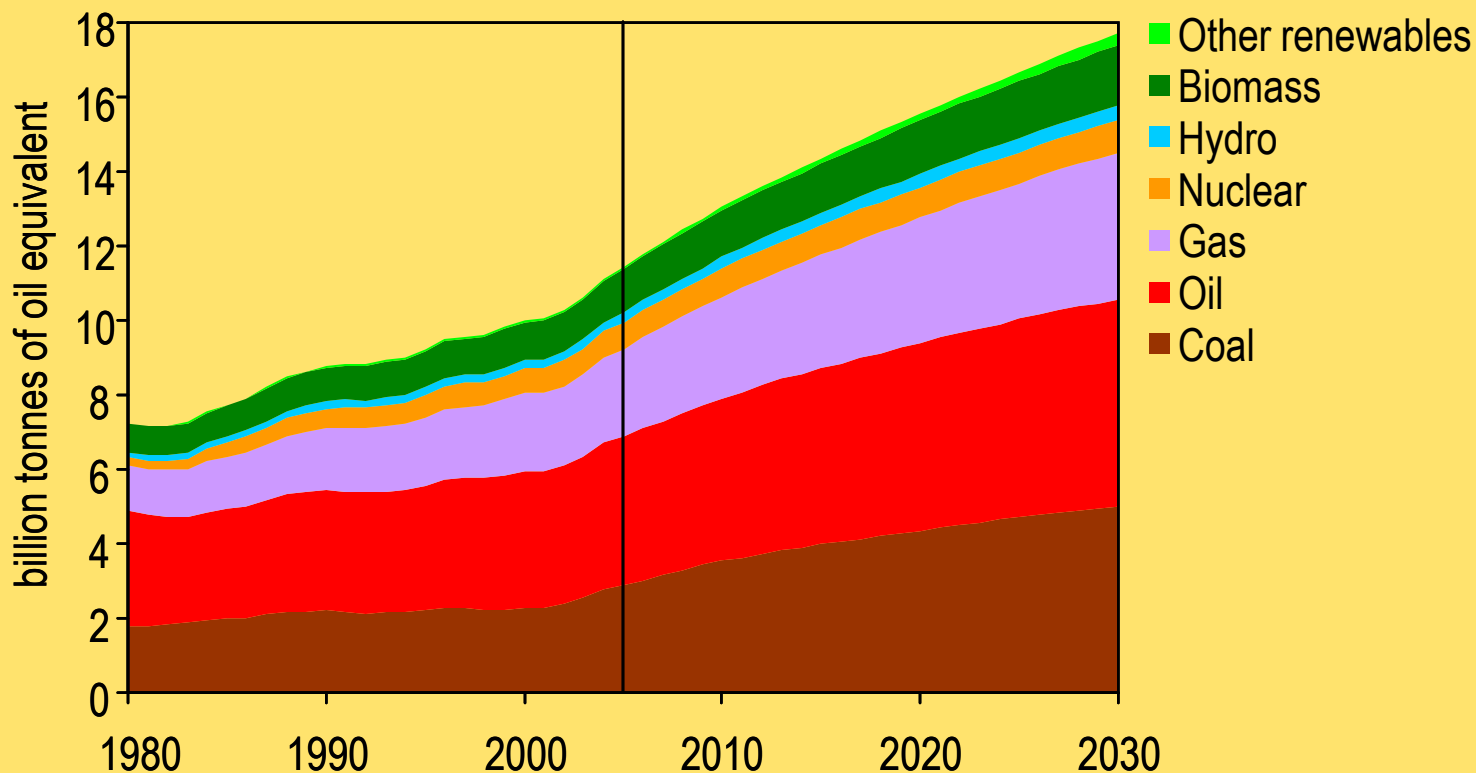




Reference Scenario: World Primary Energy Demand

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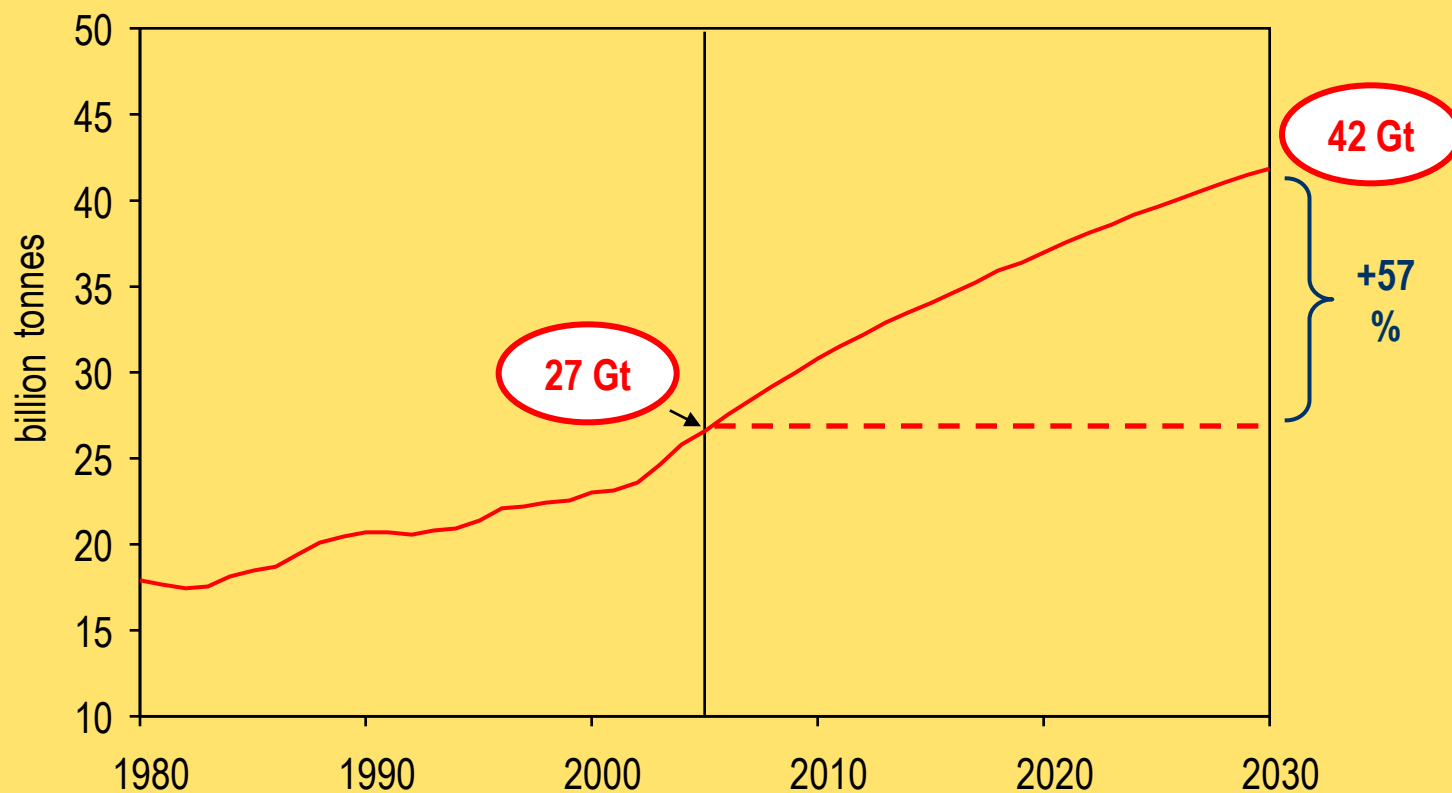


Global demand grows by more than half over the next quarter of a century, with coal use rising most in absolute terms

Task Ahead: Global CO₂ Emissions and Climate Change

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Global CO₂ emissions rise to 42 gigatonnes in 2030, 57% above current levels and double the 1990 level

World's Top Five CO₂ Emitters

	2005		2015		2030	
	Gt	rank	Gt	rank	Gt	rank
US	5.8	1	6.4	2	6.9	2
China	5.1	2	8.6	1	11.4	1
Russia	1.5	3	1.8	4	2.0	4
Japan	1.2	4	1.3	5	1.2	5
India	1.1	5	1.8	3	3.3	3

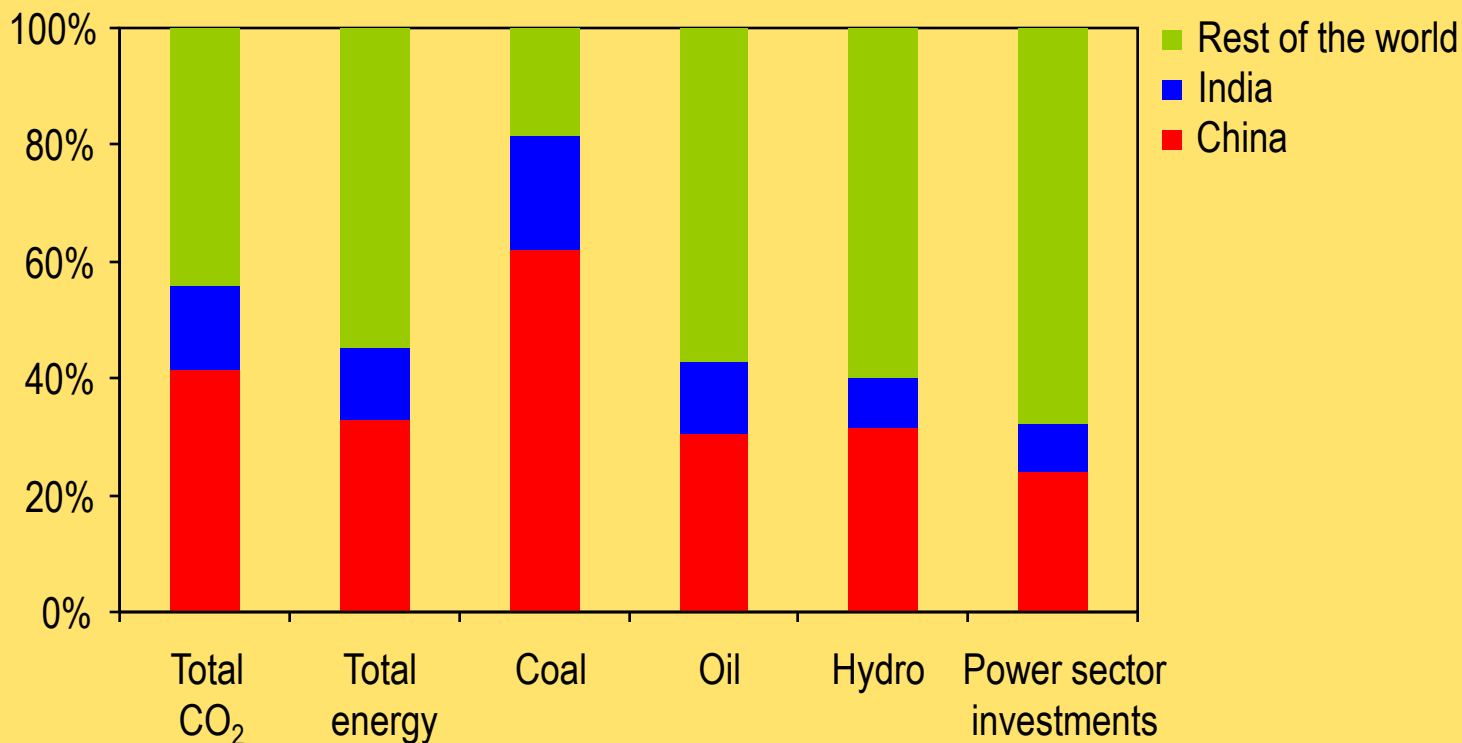
China becomes the largest emitter in 2007 & India the 3rd largest by 2015

The Emerging Giants of World Energy

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Increase in CO₂, Primary Energy Demand & Investment
Between 2005 & 2030 as Share of World Total



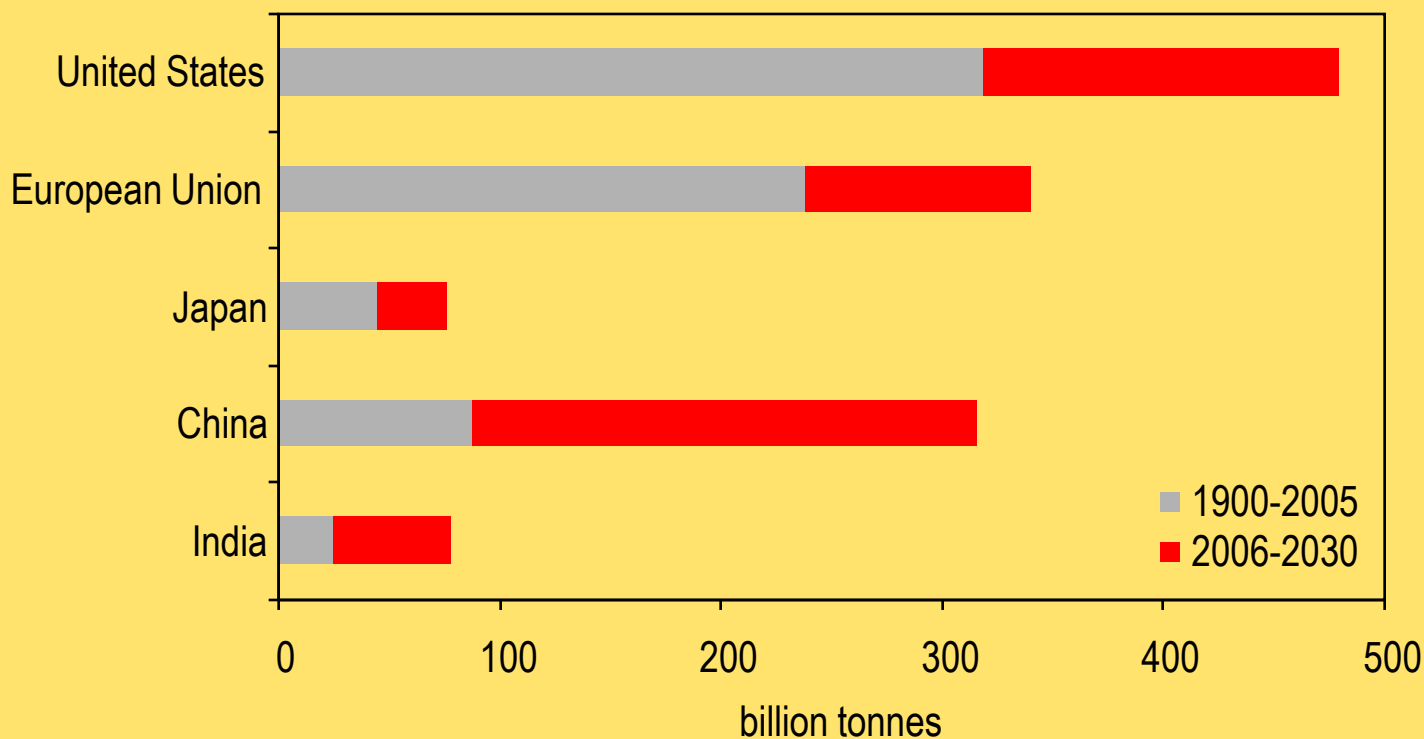
China & India will contribute almost 60% of the increase in global carbon dioxide emissions to 2030

China & India in Global CO₂ Emissions

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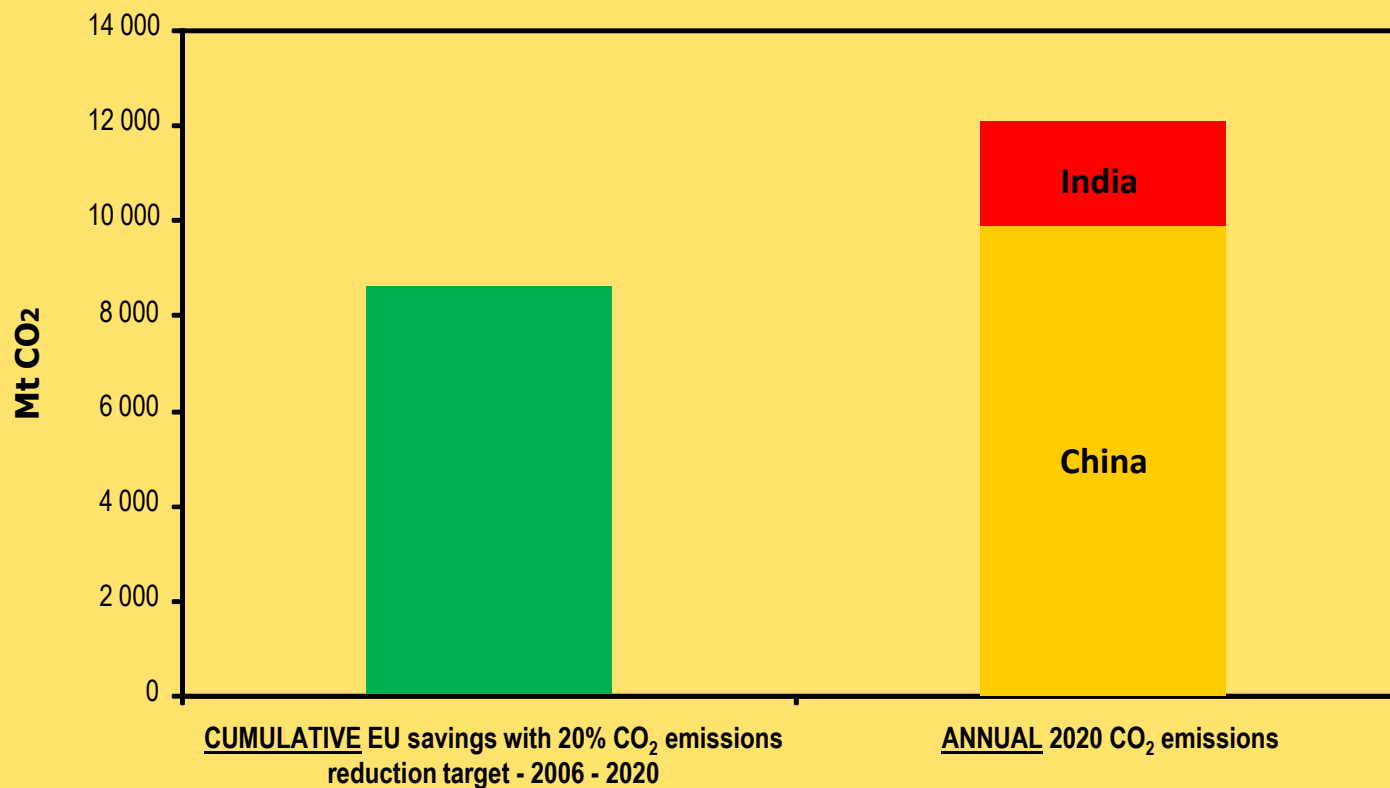
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Cumulative Energy-Related CO₂ Emissions



Around 60% of the global increase in emissions in 2005-2030 comes from China & India

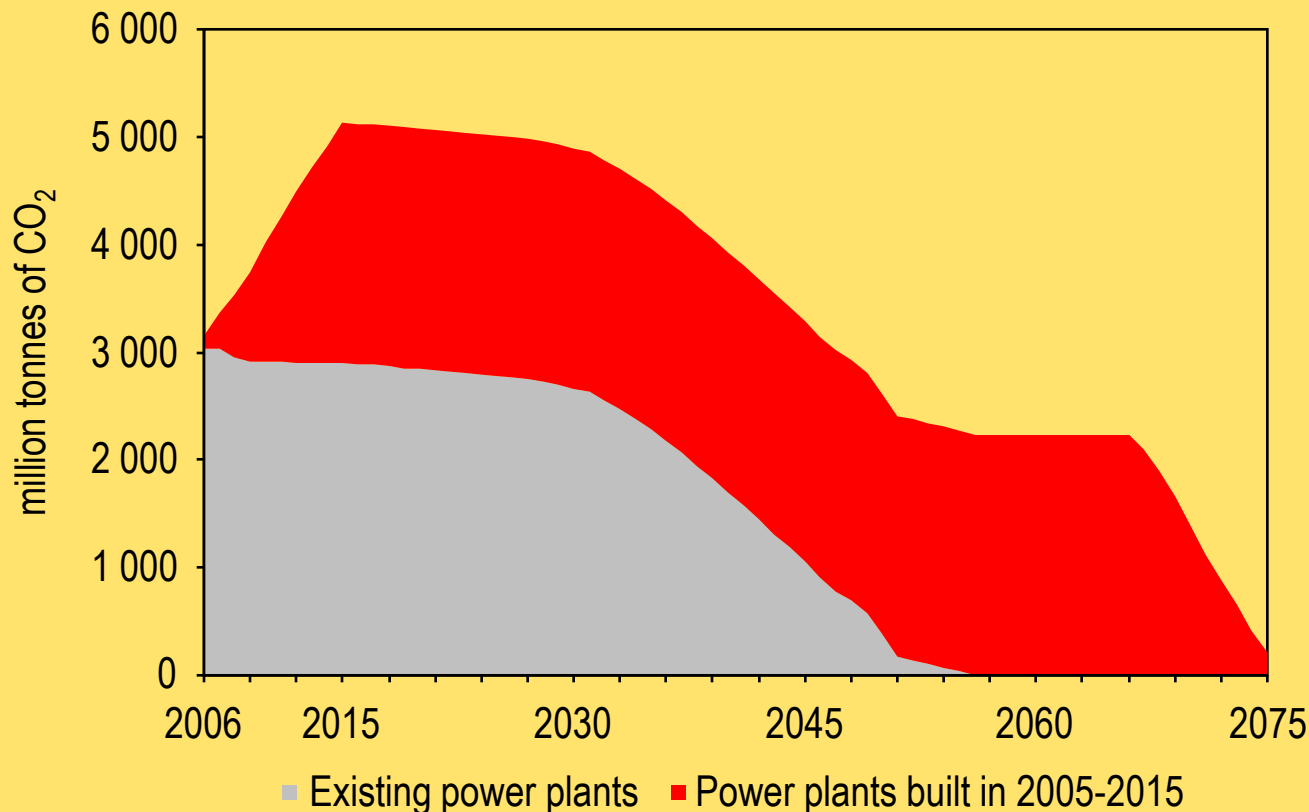
Cumulative European emissions savings with 20% reduction target in 2020



EU cumulative savings over 2006-2020 would represent 70% of China and India's annual emissions in 2020...

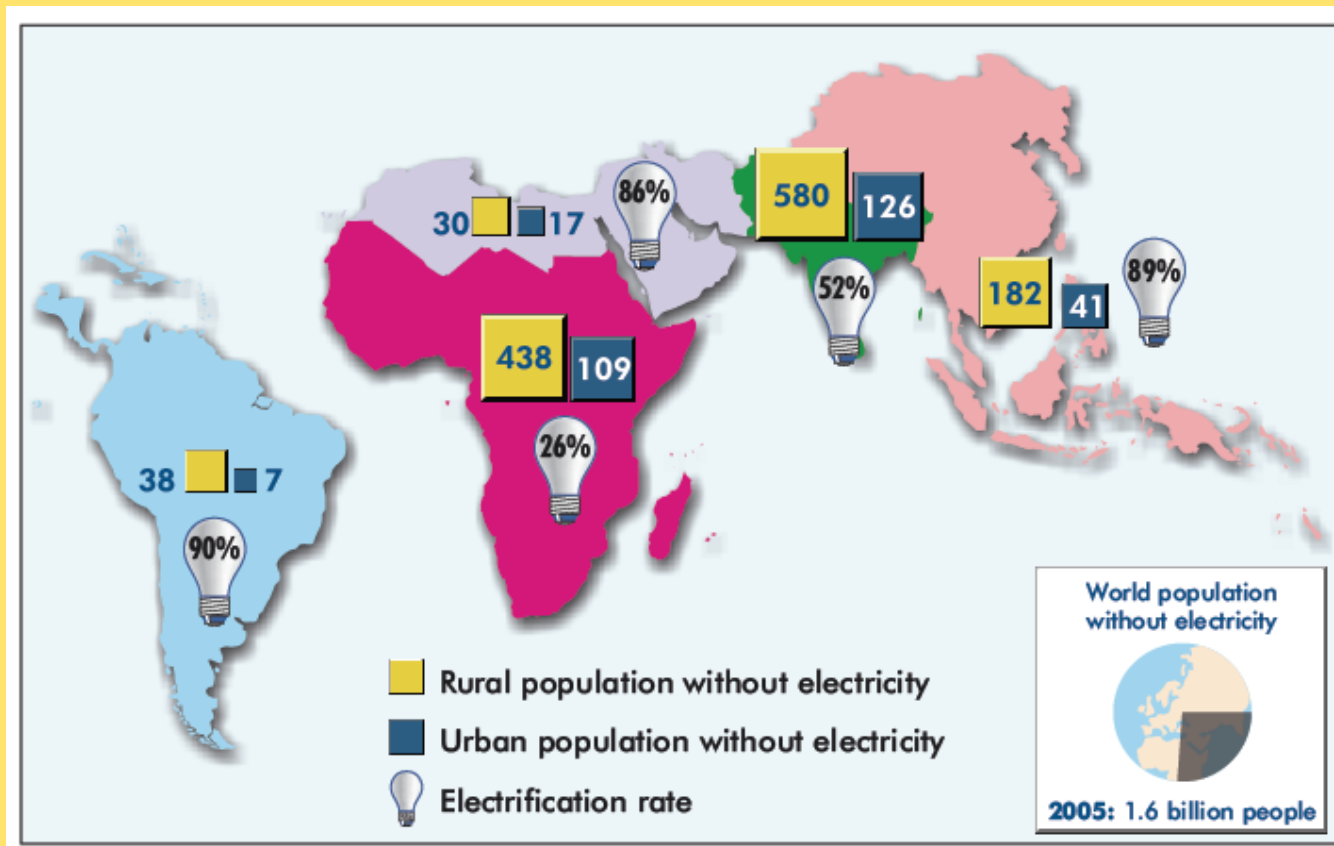


CO₂ Emissions from Coal-Fired Power Stations built prior to 2015 in China & India



Capacity additions in the next decade will lock-in technology & largely determine emissions through 2050 & beyond

Population without electricity



In 2030, if no major new policies are implemented, there will still be 1.4 billion people without electricity.



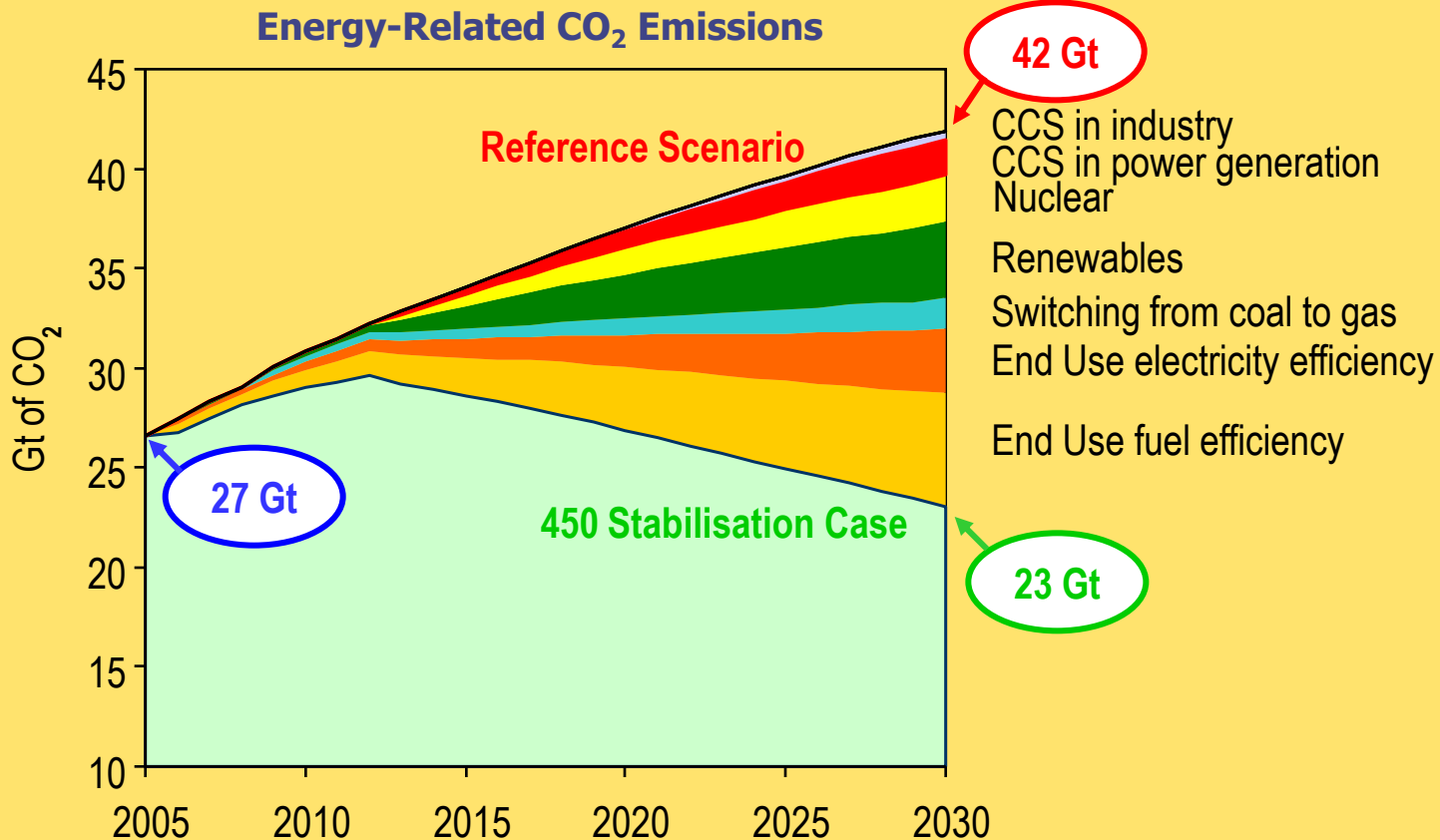
How Do We Get There from Here?



CO₂ Emissions - 450 Stabilisation Case

WORLD ENERGY OUTLOOK 2007

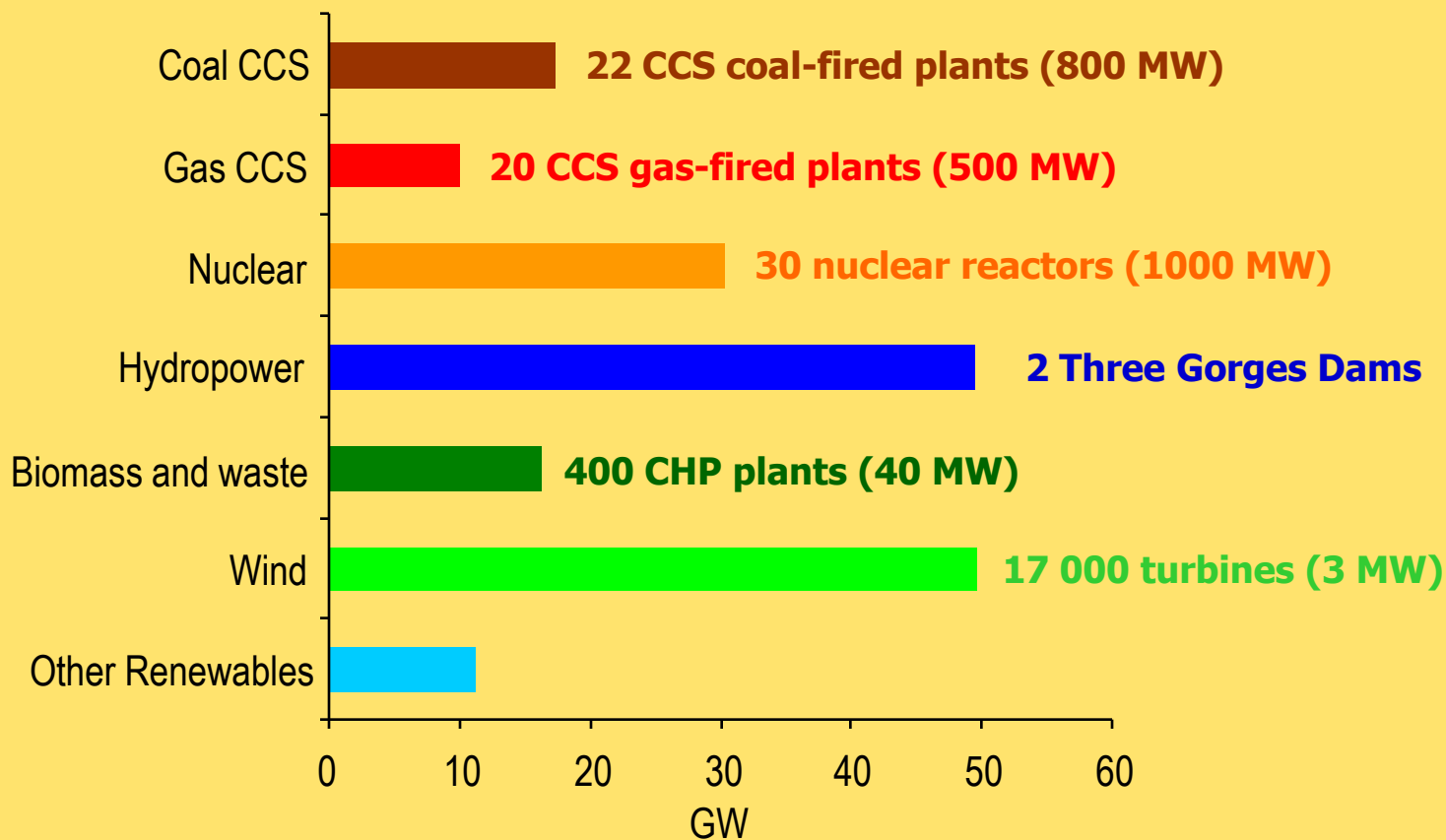
China and India Insights



In line with G-8 appeal in Heiligendamm, by 2030 emissions are reduced to some 23 Gt



Average Annual Power Generation Capacity Additions in the 450 Stabilisation Case, 2013-2030



So what would the '450ppm Stabilisation Case' mean in practice?



Conclusions

- Twin Threats: Energy security and climate change
- Energy sector is key to reduce climate change threat
- China and India are engines of global energy demand -- countries putting economic development as top priority
- Next 10 years are critical
- Road to Copenhagen – a way out ?