

U.S. – Asia Pacific Comprehensive Energy Partnership



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Bureau of Energy Resources
Asia Pacific Business Outlook Conference
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Bureau of Energy Resources (ENR)

Sustainable, Affordable, Reliable, Access to Diverse Energy Supplies

Managing the Geopolitics of Energy

- Wealth/Power/Influence
- Market Dynamics
- Energy Frontiers
- Spare Capacity



Stimulate Markets for Energy Transformation

- Private and Donor Finance
- Innovation & Investment
- Access to Electricity/
Regional Interconnection
- Tariffs and Regulations
- Renewable/Efficient/Clean
Technology



Transparency, Governance, and Access to Energy

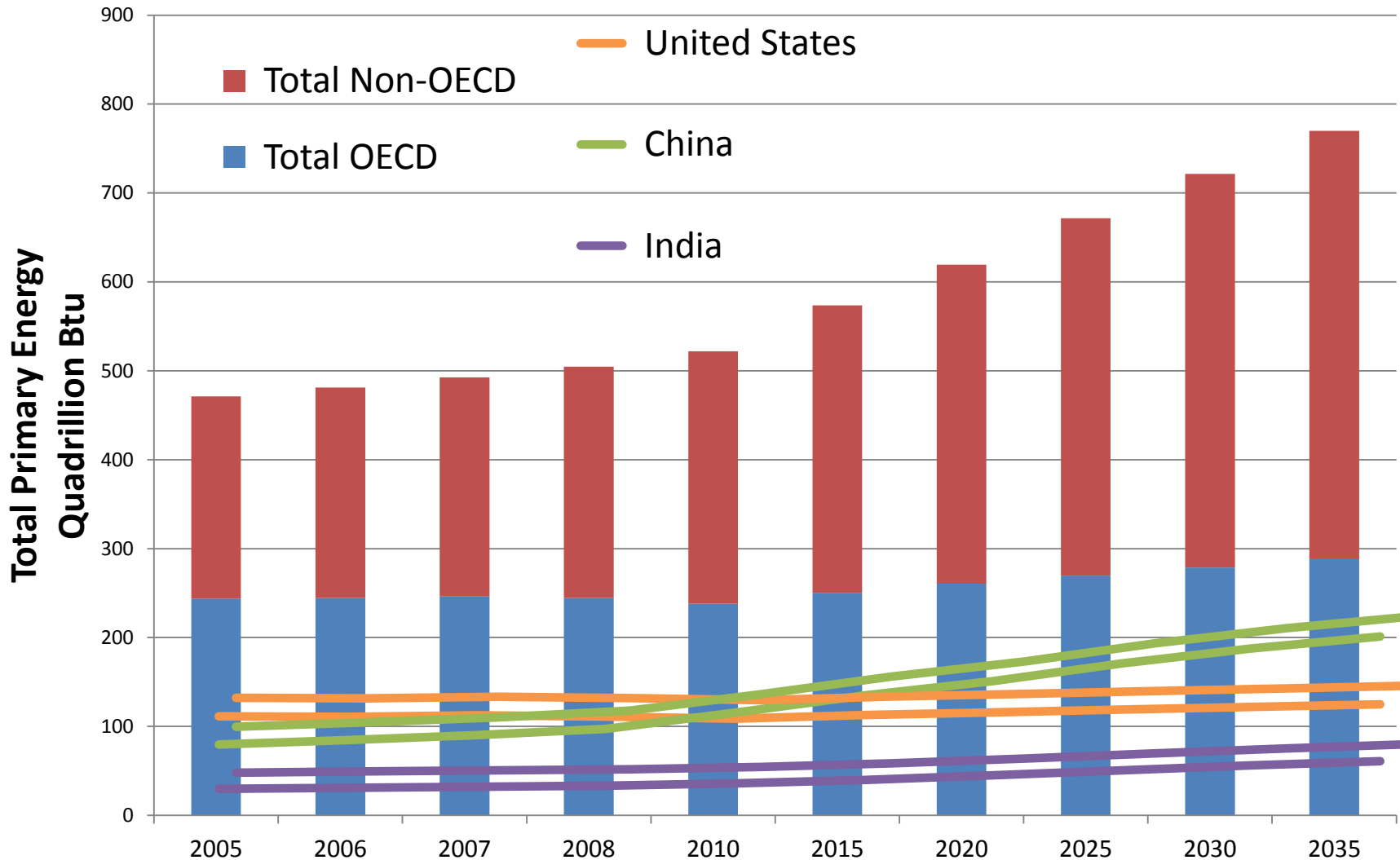
- Resources: Budgets/People
- Energy Poverty
- Markets Amid Poverty
- Entrepreneurship/Innovation



Production and Consumption Trends



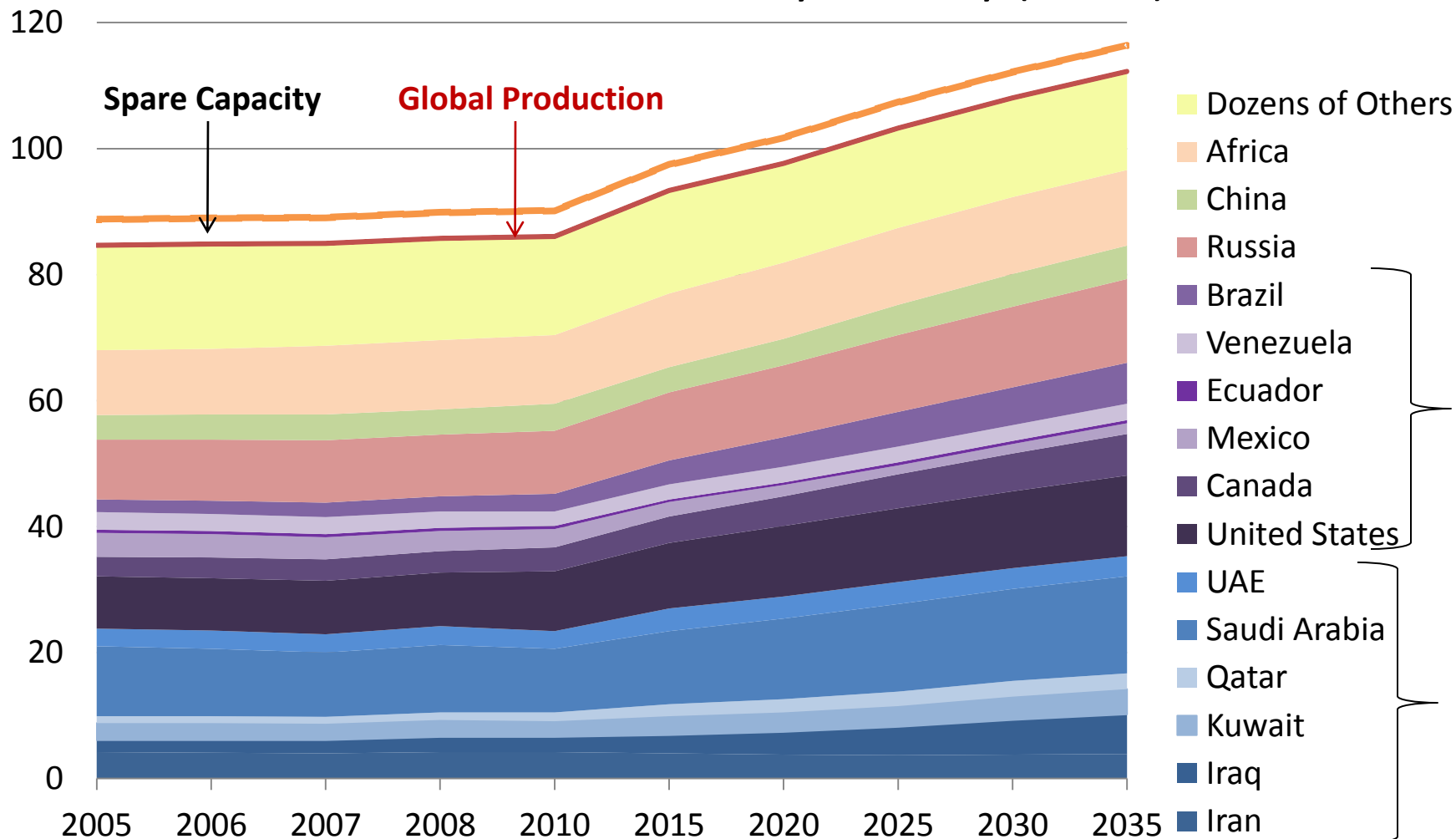
World Energy Consumption, 1990-2035



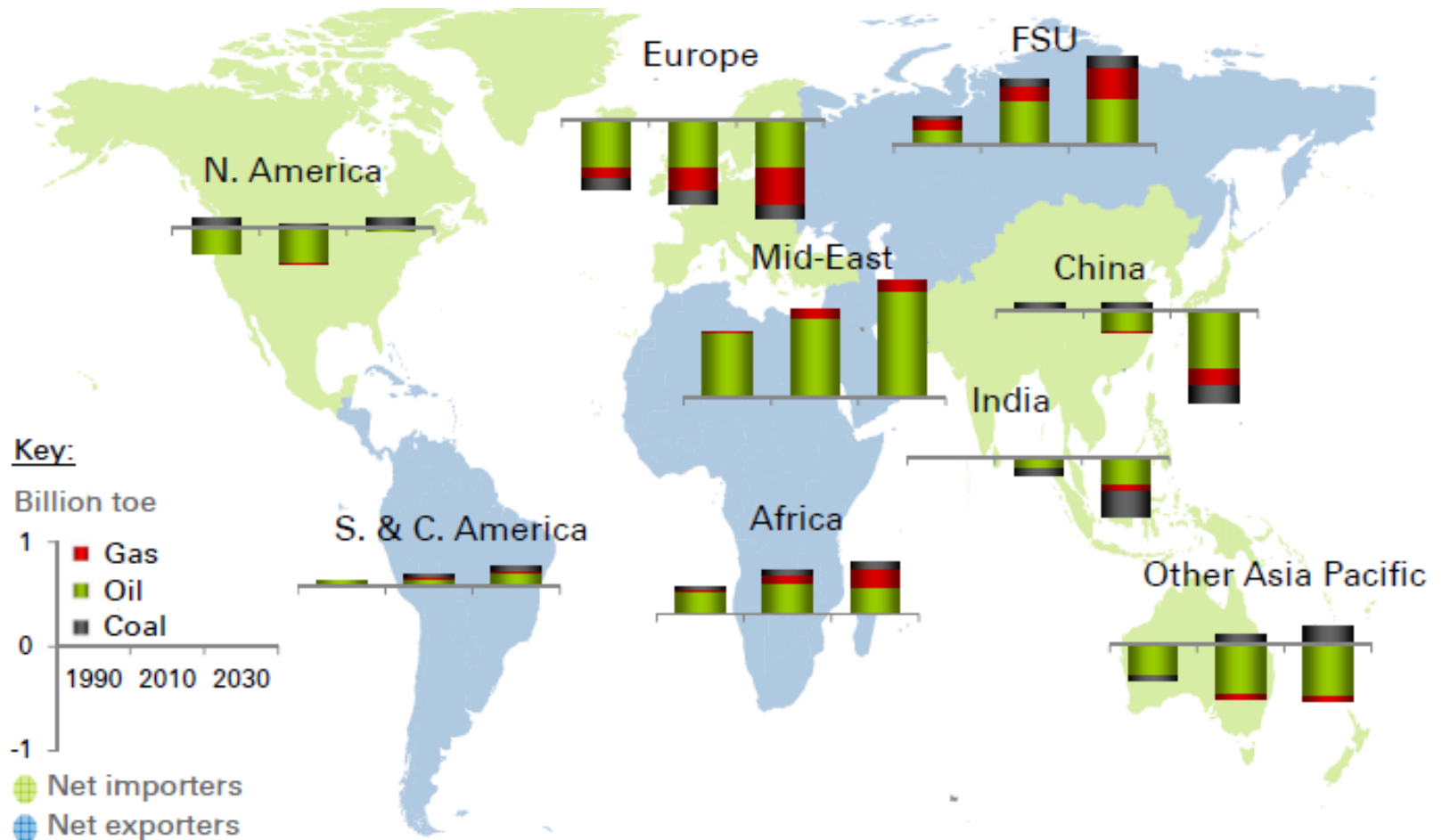
Source: U.S. Energy Information Administration, AEO 2011

Challenges to Oil Market Stability

Global Oil Production by Country (Mb/d)

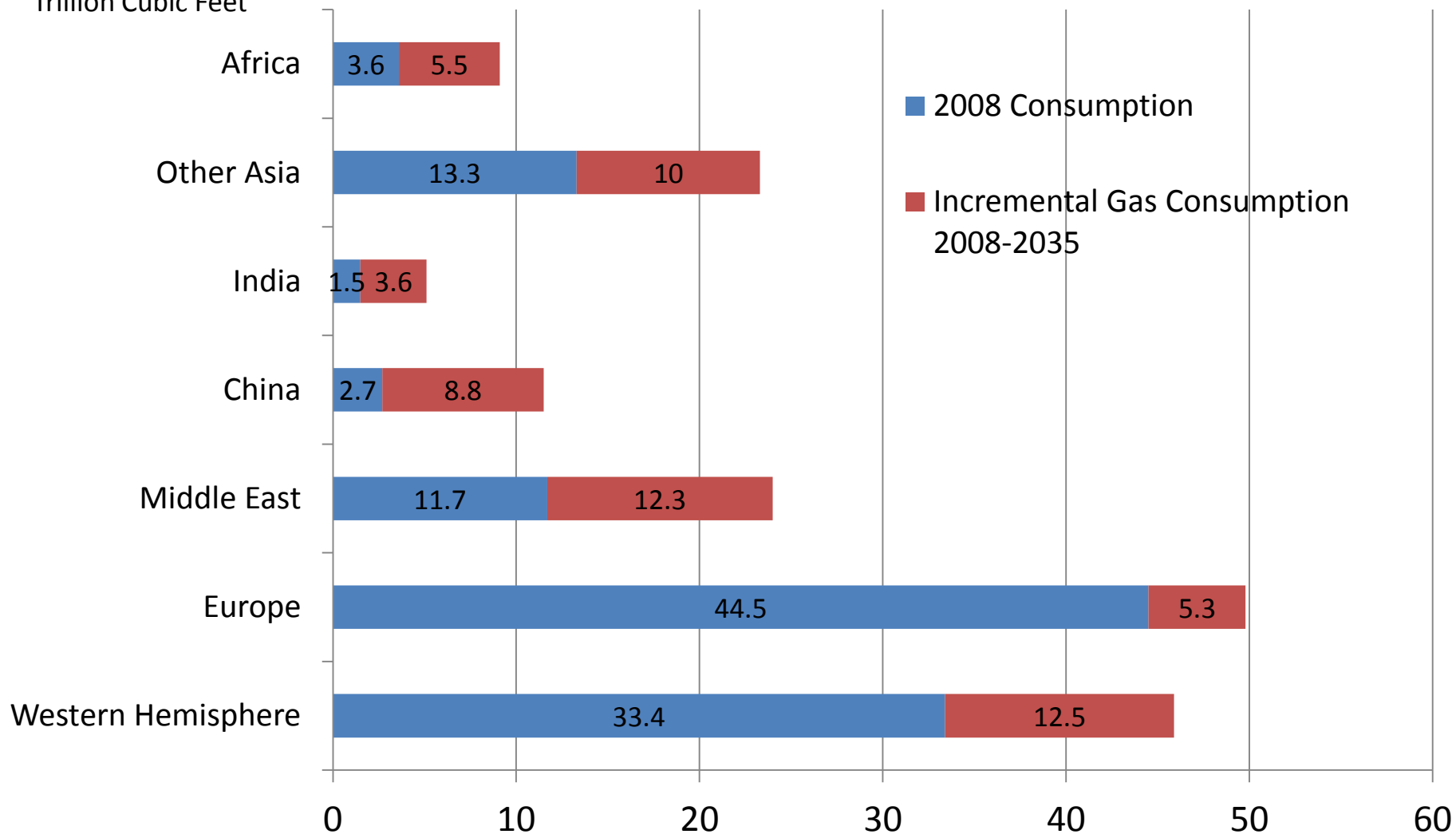


Regional Energy Balances in 2030



Global Natural Gas Demand and Incremental Growth

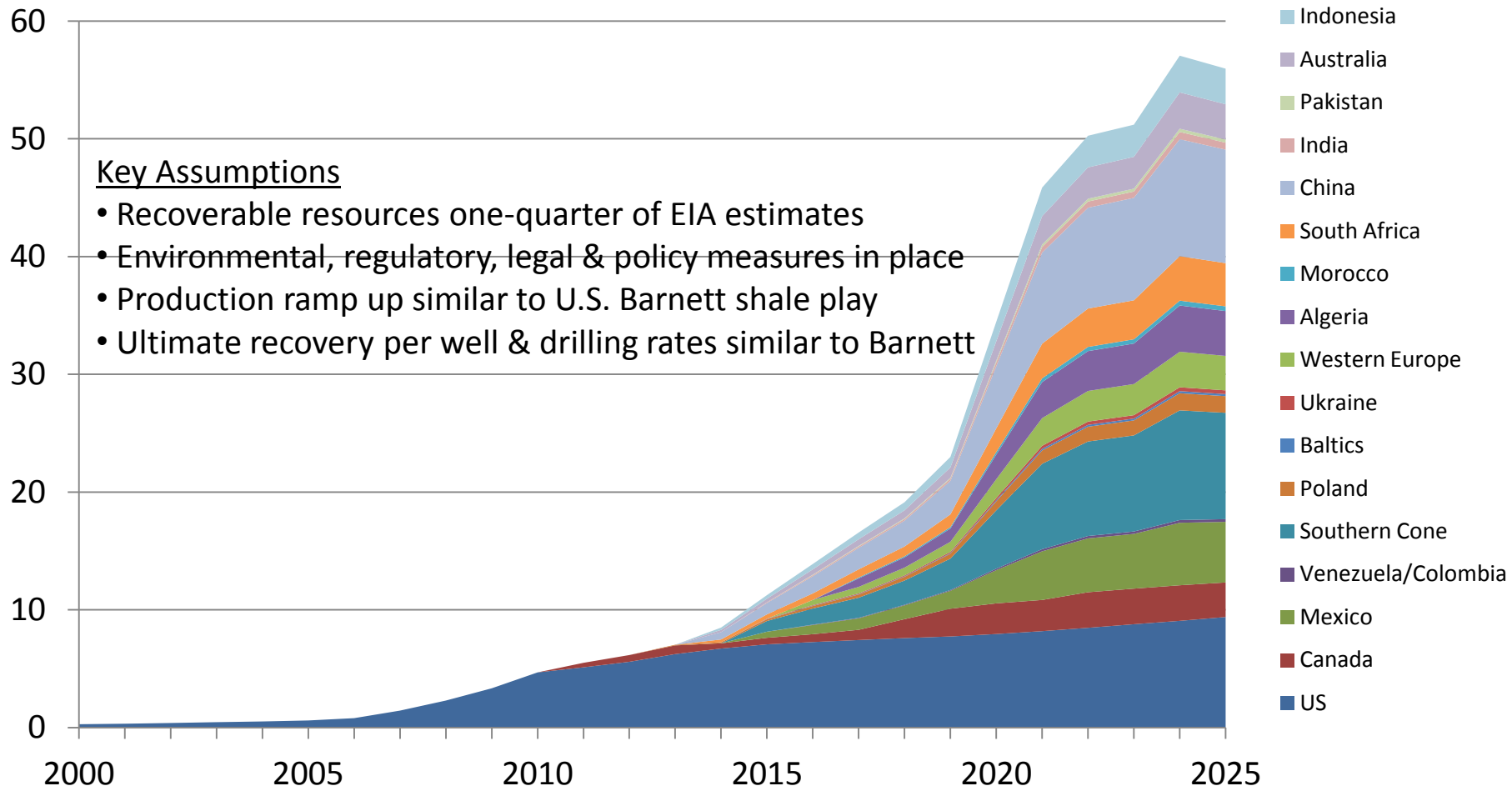
Trillion Cubic Feet



Source: U.S. Energy Information Administration, IEO 2011

Possible Impact on Global Gas Market

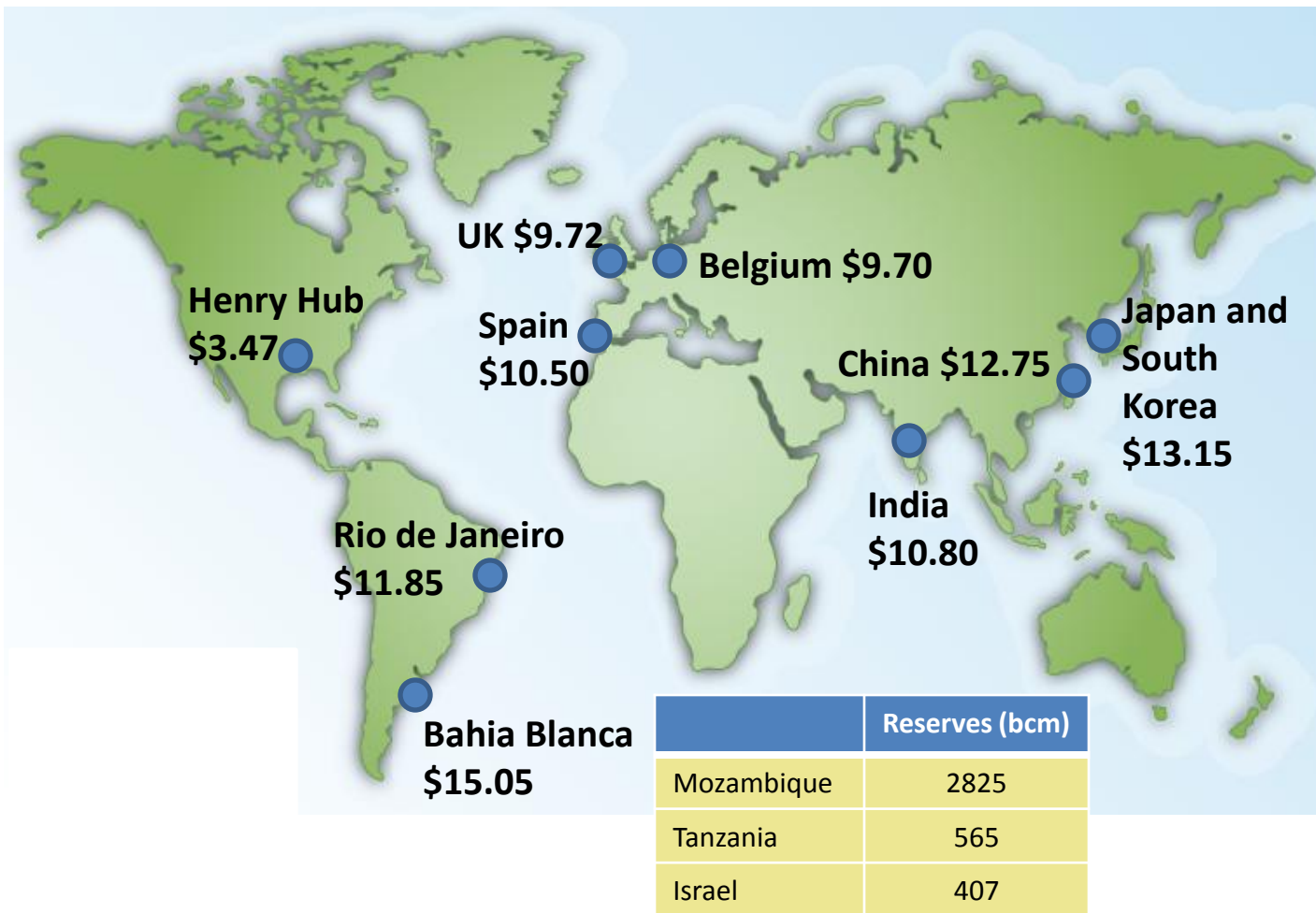
Trillion cubic feet



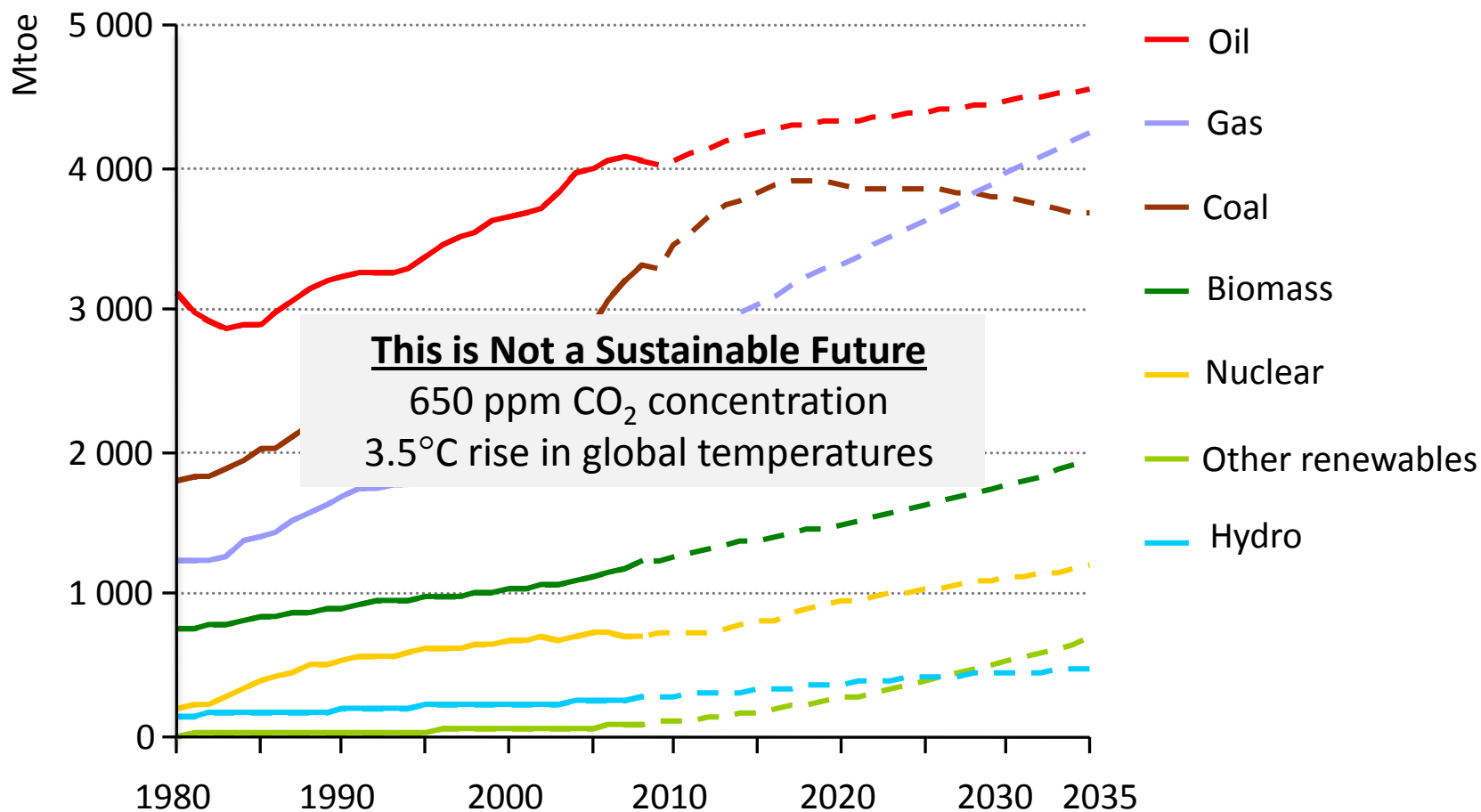
Global Gas Markets

World LNG Estimated November 2012 Landed Prices (\$US/mmbtu)

	Production (bcm)	
	2008	2035
Russia	662	881
Iran	130	279
Turkmenistan	71	136
Canada	175	192
United States	575	779
Norway	102	127
Australia	45	155
Qatar	78	260
Indonesia	74	119
Nigeria	32	119
Algeria	82	168
Latin America Total	148	292



World Primary Energy Demand by Fuel in the IEA's GAS Scenario



Energy Access and Interconnection



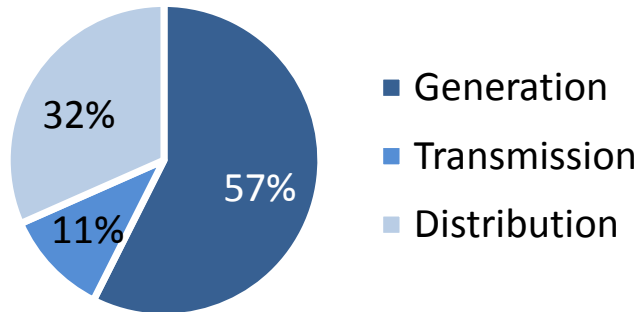
Electricity Access

Number of people without electricity access (millions)



Global Power Sector Investments, Cumulative 2012-2035

Power: \$16.9 trillion



➤ More than 40% of global investment in the power sector goes to transmission and distribution.

➤ Nearly two-thirds of investment is in the non-OECD to meet growing demand.

New Investment in Electricity Generation, 2012-2035 (\$ billion)

	OECD	Non-OECD	World
Coal	451	1,157	1,608
Gas	436	605	1,041
Oil	16	59	75
Total Fossil	903	1,821	2,724
Total Nuclear	360	583	943
Bio-energy	368	280	648
Hydro	418	1,130	1,548
Wind	1,145	984	2,129
Solar PV	717	542	1,259
Other*	226	208	434
Total Renewable	2,874	3,144	6,018
TOTAL GENERATION	4,137	5,548	9,685

Source: IEA, WEO 2012, New Policies Scenario

* Includes geothermal, concentrated solar, and marine

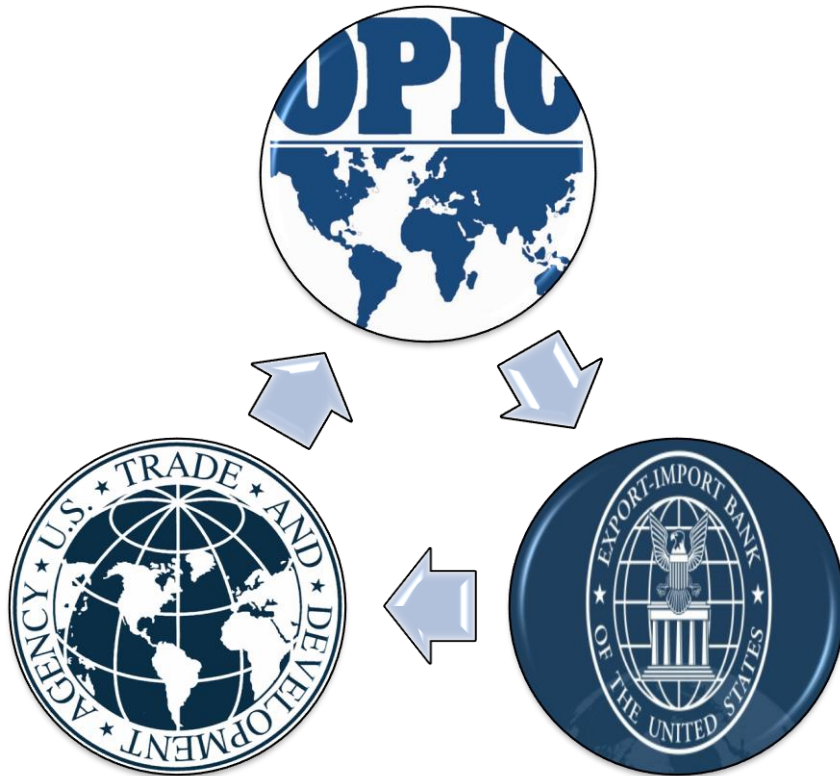
USACEP Priority Areas

- Power Markets and Interconnectivity
- The Emerging Role of Natural Gas
- Renewable and Greener Energy
- Sustainable Development (Rural Electrification)
- Promoting and seeking deals that can benefit from U.S. Government funding

USACEP Regional Programs

- Smart Grid Reverse Trade Mission
 - LMI Power Sector Integration Technical Assistance
 - Smart Grid Interconnections Initiative
 - Public Private Partnership Conference
 - Energy Smart Communities Initiative (ESCI)
 - Regional Natural Gas Event
 - LMI Gas Infrastructure and Policy Assessment
 - U.S.-Indonesia Unconventional Gas Technical Engagement Program (UGTEP)
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Project Finance



- Overseas Private Investment Corporation (OPIC)
 - \$1 billion available in political risk insurance, project financing, investment funds
- Export-Import Bank (EX-IM)
 - \$5 billion in export credit financing
- U.S. Trade and Development Agency (USTDA)
 - International Business Partnership Program, Project Development Program
- State Department
 - Sponsored training of Foreign and Commercial Service Officers on financing mechanisms and regulations

Questions?

For further information or questions please contact us at
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