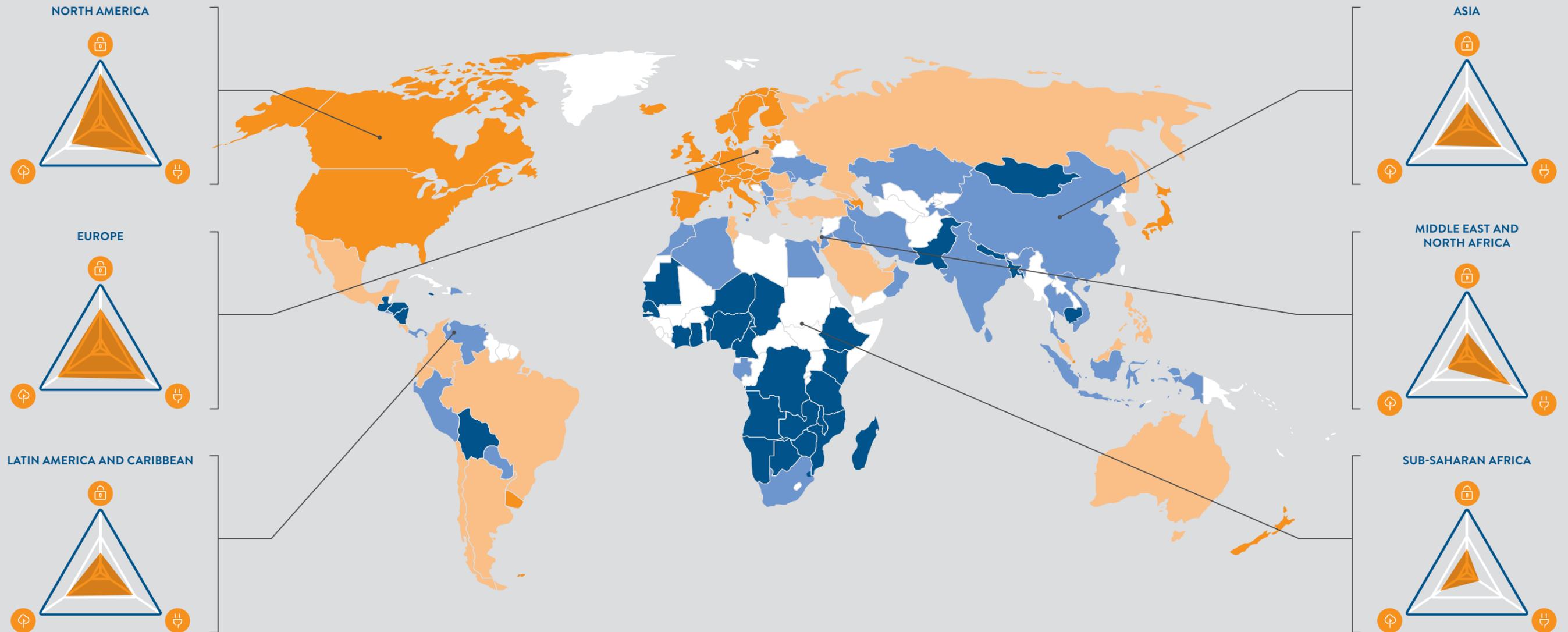




WORLD ENERGY TRILEMMA INDEX 2016: REGIONAL OVERVIEWS

COUNTRY PERFORMANCE



NORTH AMERICA STRUGGLES WITH AGEING INFRASTRUCTURE AND EXTREME WEATHER

With 14% of total global greenhouse gas emissions stemming from North America, the region must improve environmental sustainability and update ageing energy infrastructure to strengthen resilience to emerging risks, including extreme weather events and cyber attacks. Environmental sustainability is expected to improve significantly due to emission reduction measures such as the development of carbon capture, usage and storage technologies, and further diversification of the energy mix.

EUROPE MANAGING THE ENERGY TRANSITION

Although European countries lead the 2016 Index, the region still faces the challenge of managing the energy security and affordability risks resulting from the energy transition. To maintain a strong Trilemma performance, policymakers must focus on energy market design, regional markets, demand management, and designing an effective carbon price to successfully manage the challenging energy transition.

LATIN AMERICA AND THE CARIBBEAN BUILDING RESILIENCE AND ENERGY EQUITY

The Latin America and Caribbean region must work on improving and maintaining its energy security by increasing the energy system's resilience to extreme weather events and improving energy equity. Diversifying the energy supply with low-carbon sources such as solar and wind and increasing regional interconnection will be key to securing reliable supply. However, large-scale investments are required to finance the development of resilient energy infrastructure.

ASIA DECREASING IMPORT DEPENDENCE IN THE FACE OF GROWING DEMAND

Asia faces the challenge of facilitating sustainable growth of its highly energy-intensive, emerging economies while managing increasing energy demand and growing energy import dependence. Improvements on all three trilemma dimensions are possible by increasing the use of renewable energy sources, and by decreasing import dependence through reliable trade relationships and improved infrastructure.

MIDDLE EAST AND NORTH AFRICA DIVERSIFYING AWAY FROM OIL AND GAS

The main challenges for the Middle East and North Africa (MENA) are high energy intensity, greenhouse gas emissions, and use of finite fossil fuel reserves. Combined with water scarcity concerns, these challenges, if not addressed, could threaten the region's energy security and environmental sustainability. Many MENA countries are focused on improving energy efficiency and diversifying their economies and energy mixes through an increased use of solar and nuclear power. Significant changes to the region's trilemma performance are likely to show towards the 2020's and 2040s.

SUB-SAHARAN AFRICA UNLOCKING RESOURCES AND RENEWABLES POTENTIAL

Sub-Saharan Africa is challenged by the world's lowest levels of energy access and commercial energy use, despite a rich endowment in resources and high renewables potential. Stable and widely accessible energy supply could act as a catalyst for regional economic development. To unlock the region's resource potential and meet future energy demand the region must attract investment, build institutional capacity and improve its grid and off-grid energy supply.