



ISIAMED

Istituto Italiano per l'Asia e il Mediterraneo
Italian Institute for Asia and Mediterranean

31/3/2012

ROTARY INTERNATIONAL
FORUM INTERCLUB

ENERGIE RINNOVABILI
Sviluppo Sostenibile ed
Integrato nei Paesi Mediterranei



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Italian Institute for Asia and Mediterranean

L'Istituto Italiano per l'Asia e il Mediterraneo è un ente a carattere internazionalistico, che non persegue fini di lucro, fondato nel 1974 da un gruppo di parlamentari, imprenditori ed accademici.

Per incentivare l'internazionalizzazione dell'Italia e la proiezione del Paese nella fascia mediterranea ed asiatica sono state costituite le Associazioni di Amicizia e Cooperazione con i seguenti paesi: Afghanistan, Algeria, Bangladesh, Cina, Corea del Nord, Egitto, Indonesia, India, Iran, Iraq, Libano, Marocco, Pakistan, Palestina, Sri Lanka, Siria, Yemen, Tunisia, Turchia e Uzbekistan, nonché il Consiglio di Cooperazione con il Kazakistan.

Esso è nato per:

- concorrere all'internazionalizzazione del Paese
- svolgere una funzione di stimolo sulle istituzioni al fine di favorire la creazione di un Sistema Paese attivo, propositivo ed efficace, spingendo all'unità operativa i soggetti istituzionali protagonisti (MAE, Ambasciate, Mise, Sace, Ice, Simest, Confindustria, PMI ecc...).



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L'attività di relazioni internazionali di ISIAMED si concentra prevalentemente su tre aree operative:

- relazioni politico-diplomatiche;
- stimolo alla cooperazione economica;
- interscambi culturali.

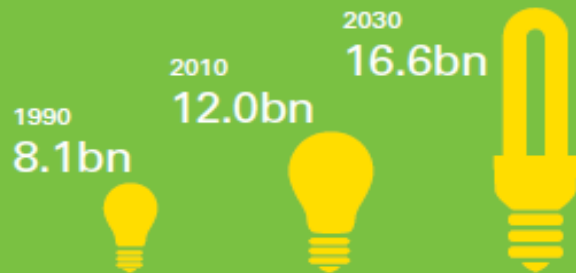
Tra i Paesi del Mediterraneo, in questi mesi, particolare attivismo si registra nelle attività con Egitto, Turchia, Tunisia, Marocco, Libia.



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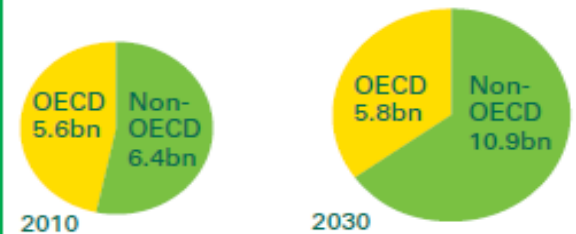
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World energy demand
(billions of tonnes of oil equivalent)

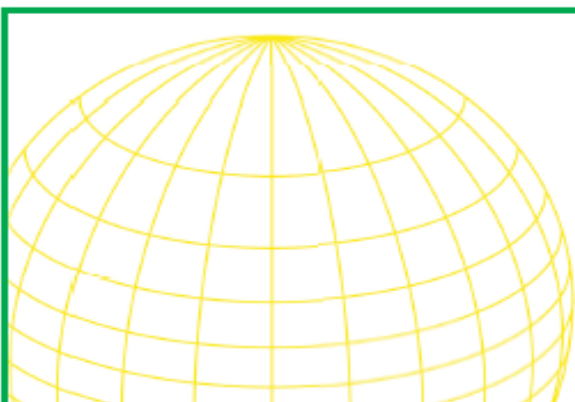
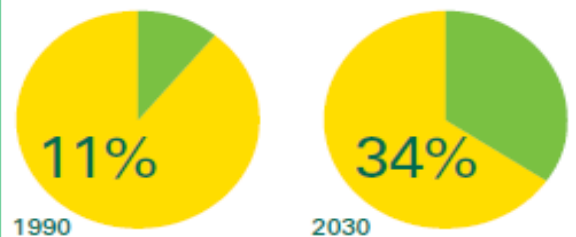


World energy demand:
OECD/Non-OECD (tonnes of oil equivalent)

Emerging economies make up 96% of growth in demand



China and India's share of world energy (%)



Energy Outlook 2030

Data at a glance

January 2012

Transport fuel 2030

(Breakdown of energy type making up transport fuel)



Oil 87%
Biofuels 7%
Gas 4%
Coal 1%
Electricity 1%

Average fuel economy of new cars
(miles per US gallon)

35
2010

55
2030

Share of fuel 1990-2030
(% shares of world energy use)

	1990	2030
Renewables*	0.4	6.3
Nuclear	5.6	6.0
Hydroelectric	6.0	6.8
Coal	27.3	27.7
Natural gas	21.8	25.9
Oil	38.9	27.2

Annual rate of increase in renewable energy* use 2010-2030

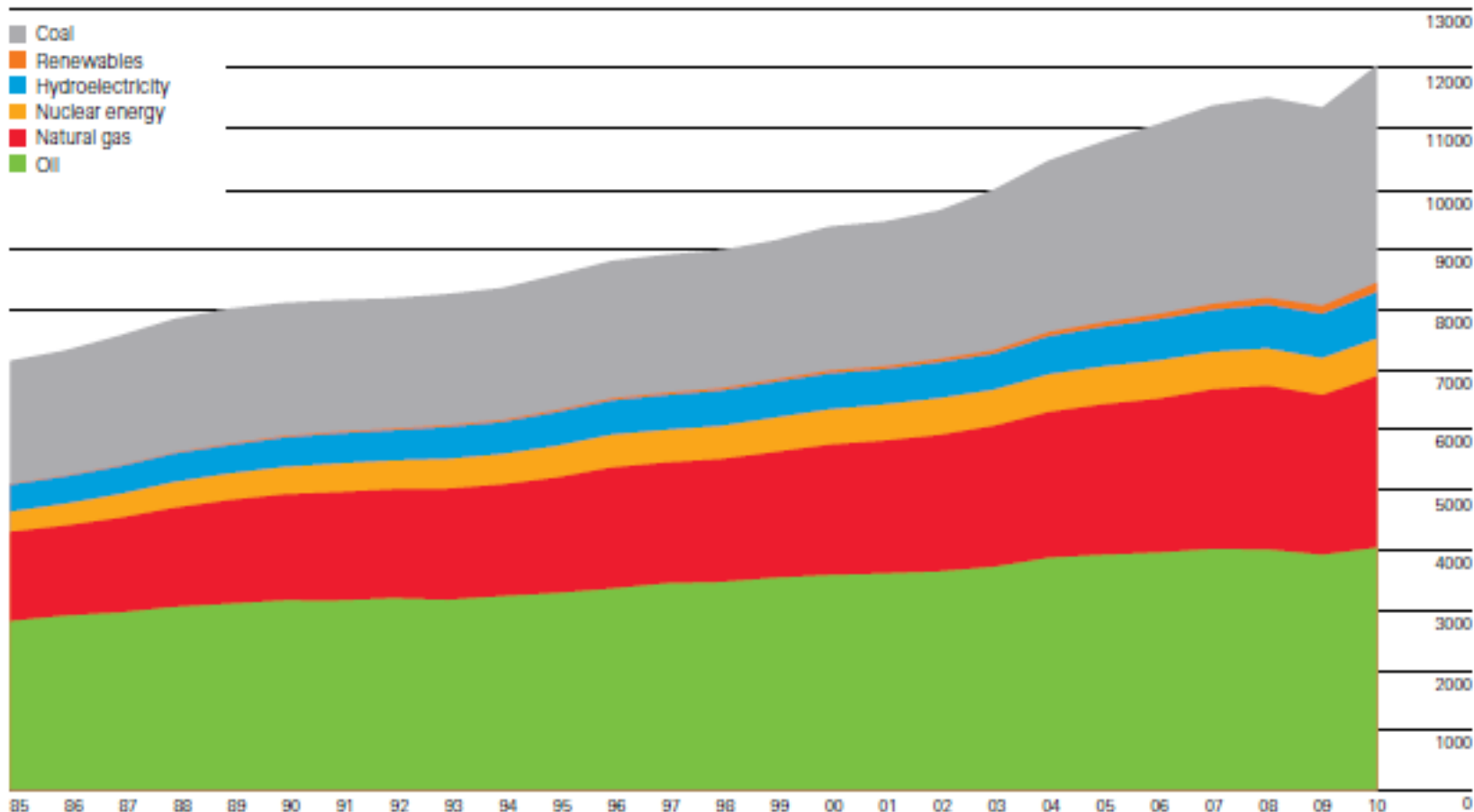
8%





World consumption

Million tonnes oil equivalent



World primary energy consumption grew by 5.6% in 2010, the strongest growth since 1973. Growth was above average for oil, natural gas, coal, nuclear, hydroelectricity, as well as for renewables in power generation. Oil remains the dominant fuel (33.6% of the global total) but has lost share for 11 consecutive years. The share of coal in total energy consumption continues to rise, and the share of natural gas was the highest on record.



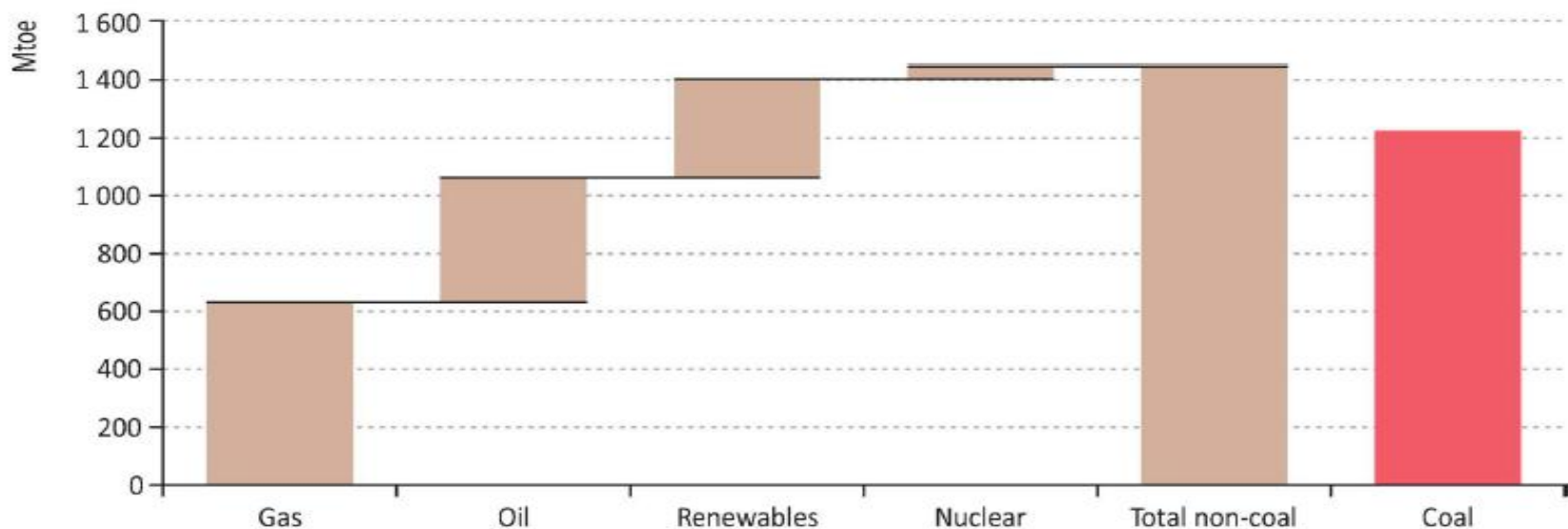
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***Coal won the energy race
in the first decade of the 21st century***

**WORLD
ENERGY
OUTLOOK
2011**

Figure 10.1: Incremental world primary energy demand by fuel, 2000-2010



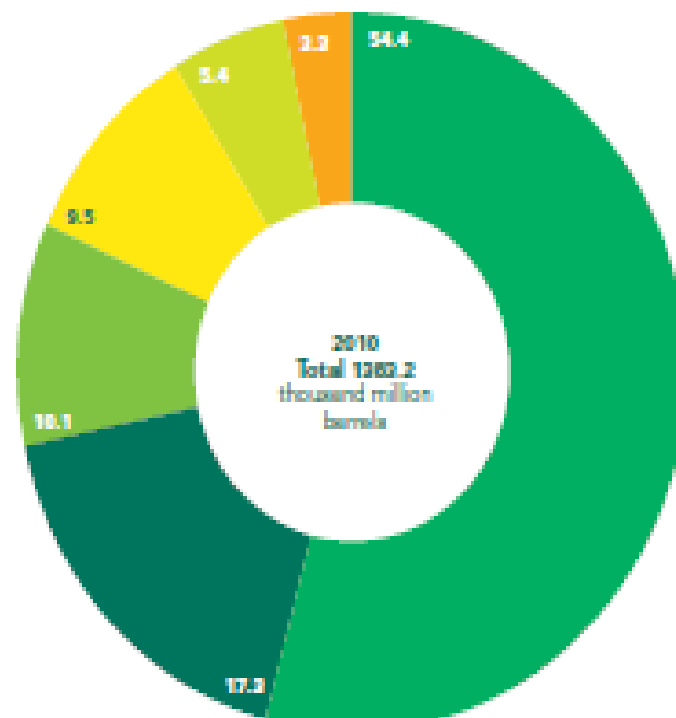
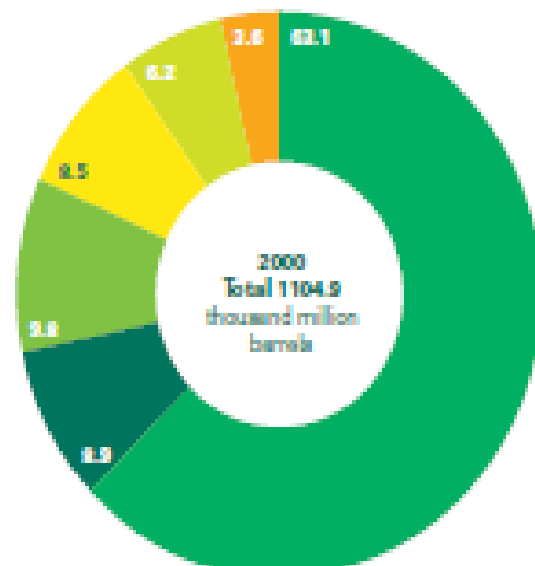
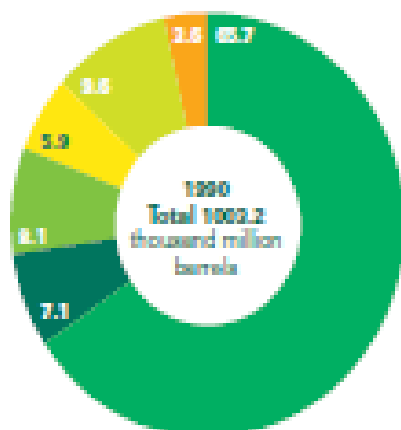
***Coal accounted for nearly half of the increase in global energy use over the past decade,
with the bulk of the growth coming from the power sector in emerging economies***



Distribution of proved reserves in 1990, 2000 and 2010

Percentage

- Middle East
- S. & Cent. America
- Europe & Eurasia
- Africa
- North America
- Asia Pacific



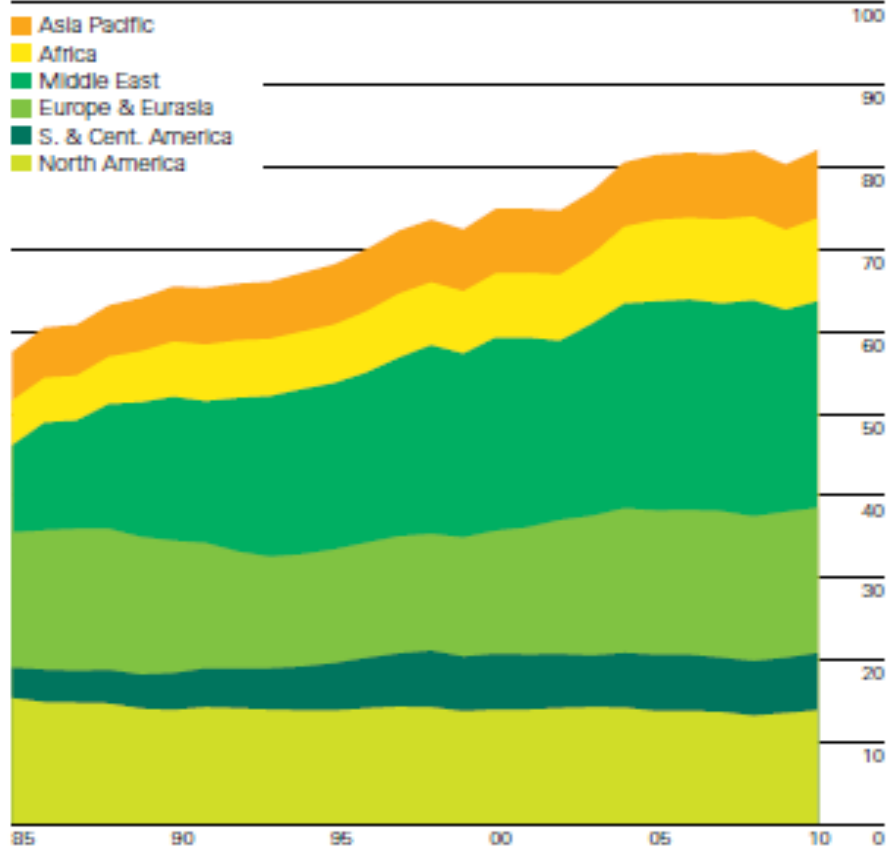


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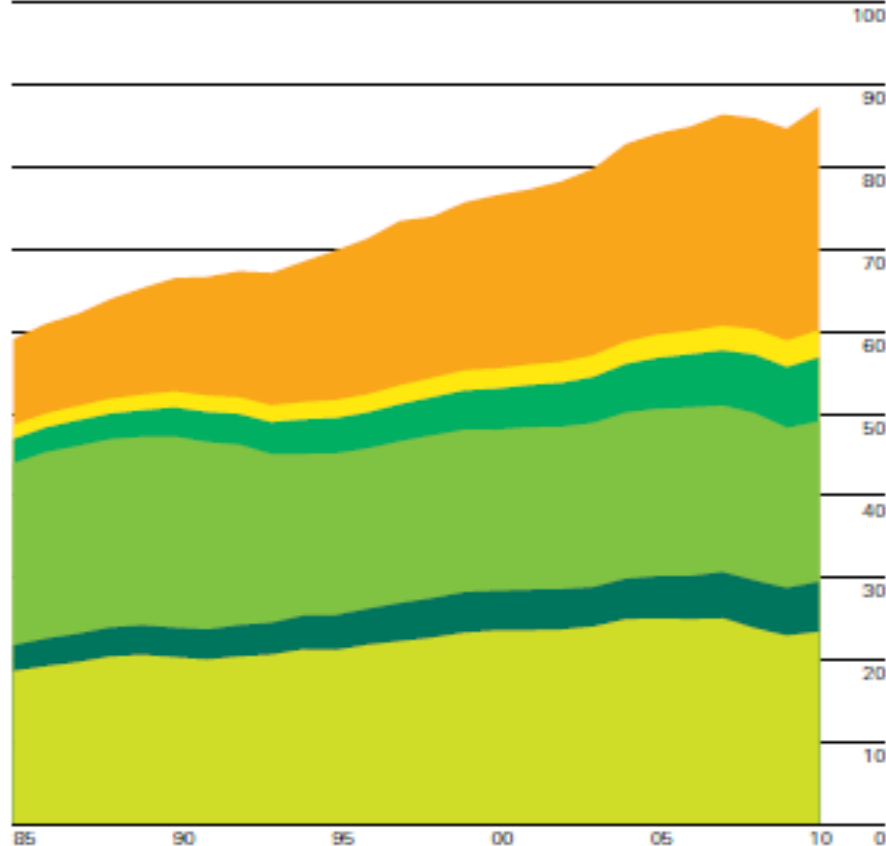
Production by region

Million barrels daily



Consumption by region

Million barrels daily



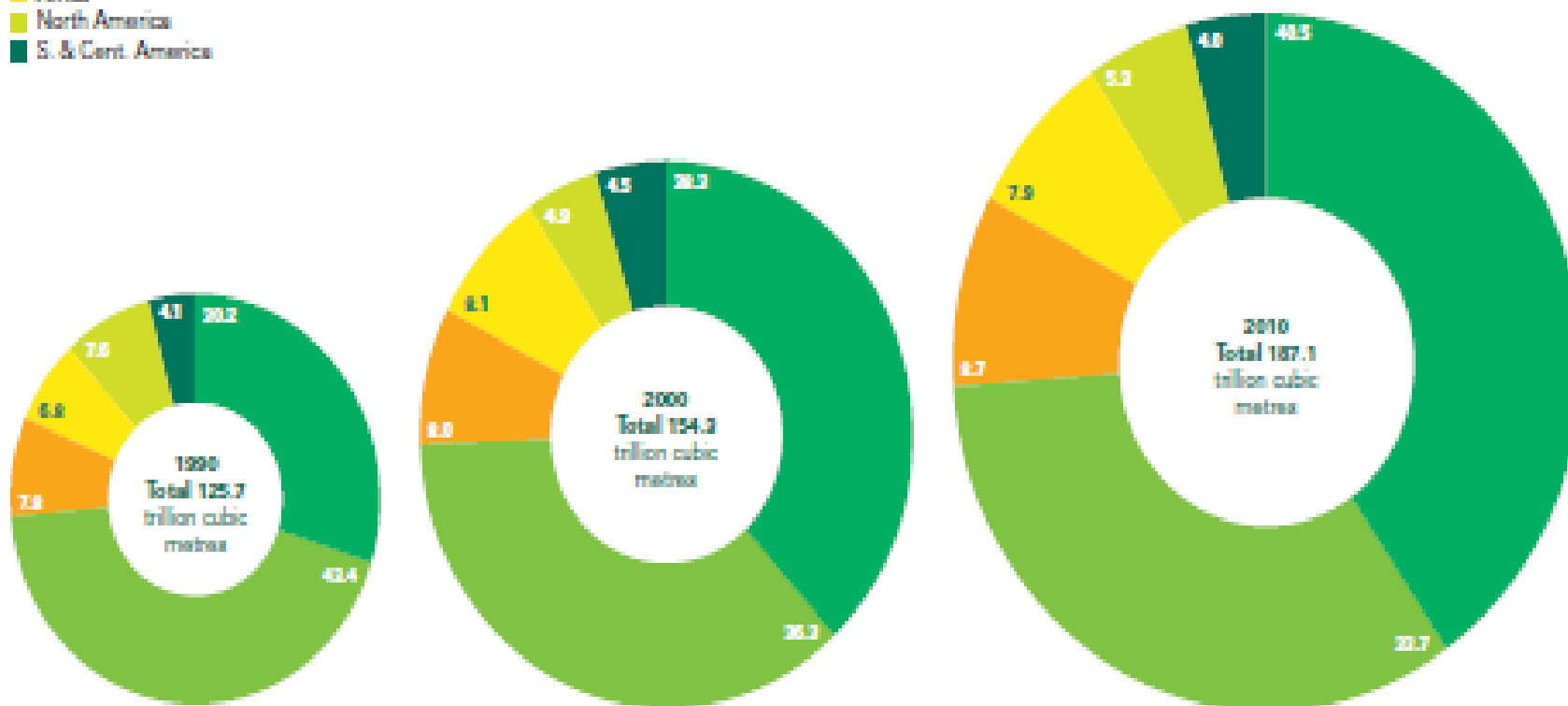
World oil production increased by 1.8 million b/d in 2010; growth was broadly-based, with increases in all regions except Europe & Eurasia. Moreover, growth was broadly split between OPEC and non-OPEC countries. World oil consumption increased by 2.7 million b/d; growth was above average in all regions, although Asia Pacific countries accounted for the majority (54%) of global consumption growth.



Distribution of proved reserves in 1990, 2000 and 2010

Percentage

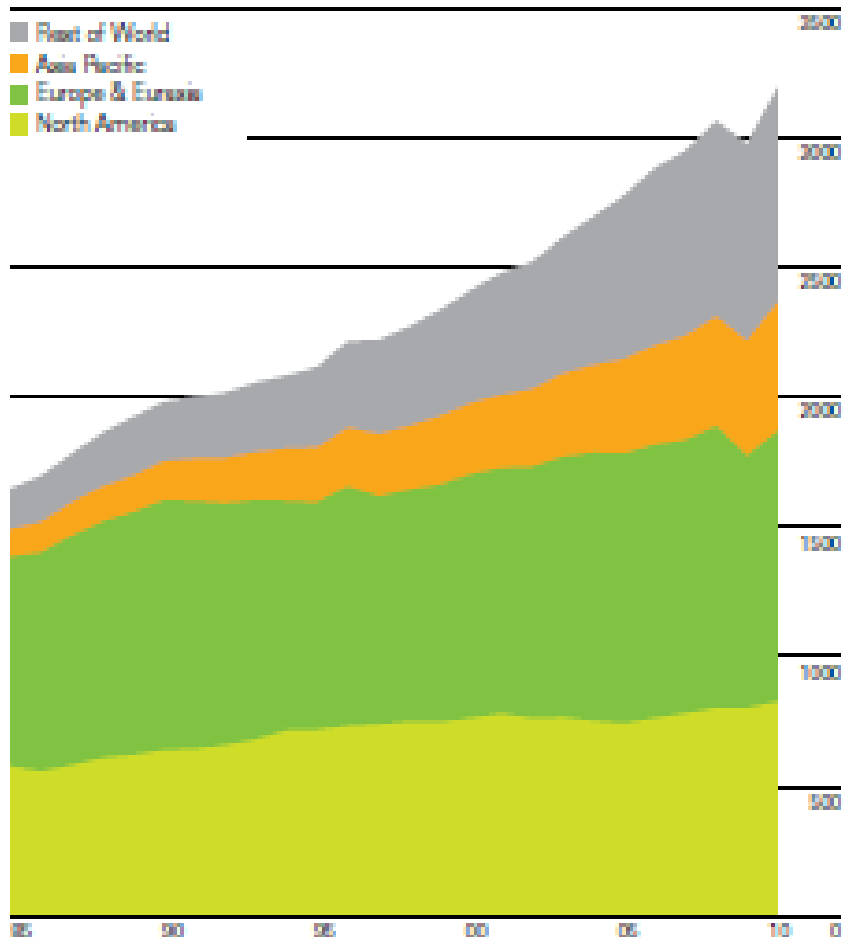
- Middle East
- Europe & Eurasia
- Asia Pacific
- Africa
- North America
- S. & Cent. America





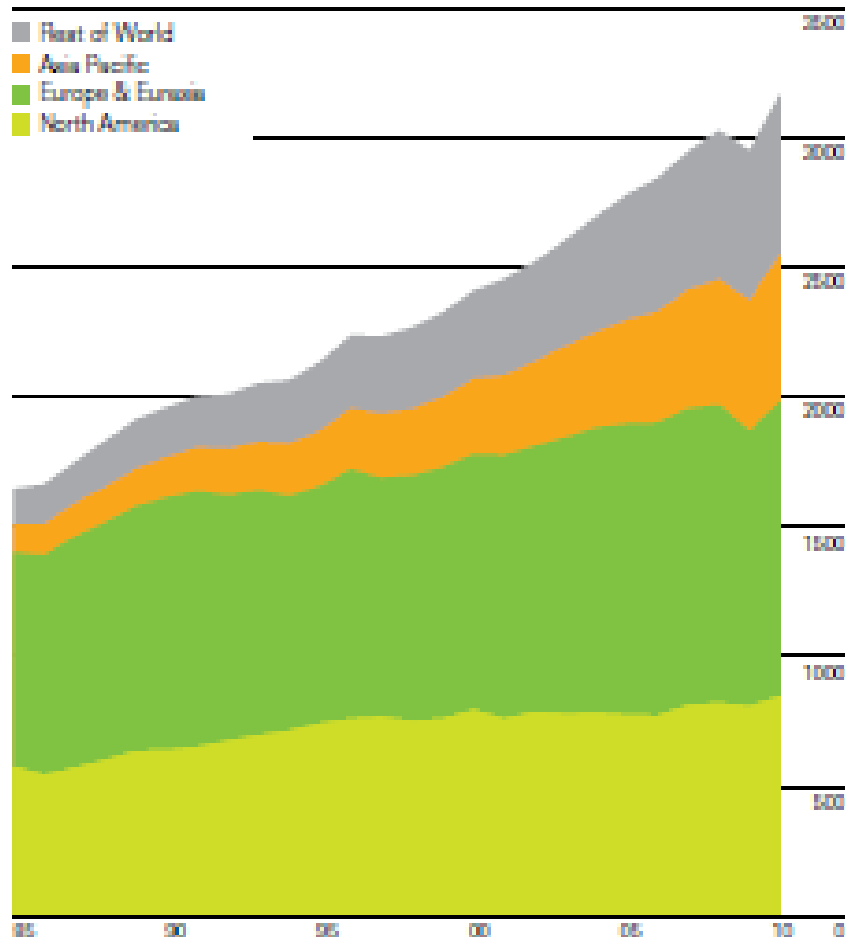
Production by region

Billion cubic metres



Consumption by region

Billion cubic metres



World natural gas production increased by 7.3%, the largest increase since 1984. Growth was above average in all regions; Russia recorded the largest production increment. Natural gas consumption increased by 7.4%, with above-average growth in all regions but the Middle East. The US recorded the world's largest gas consumption increment.

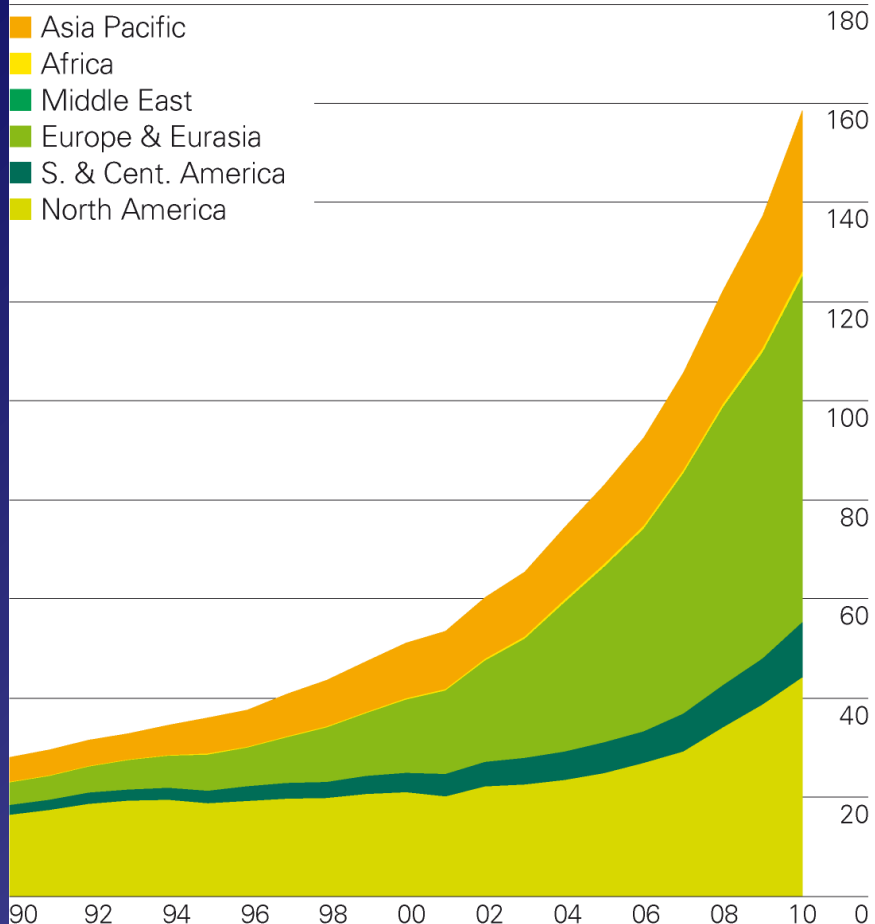


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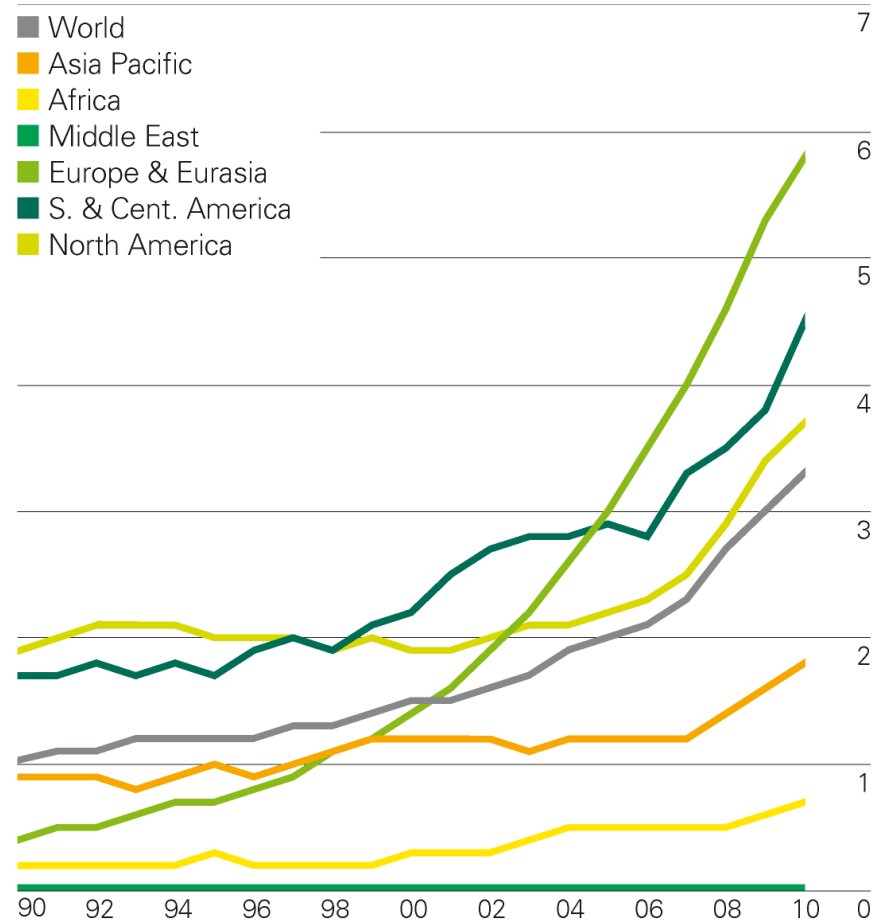
Other renewables consumption by region

Million tonnes oil equivalent



Other renewables share of power generation by region

Percentage



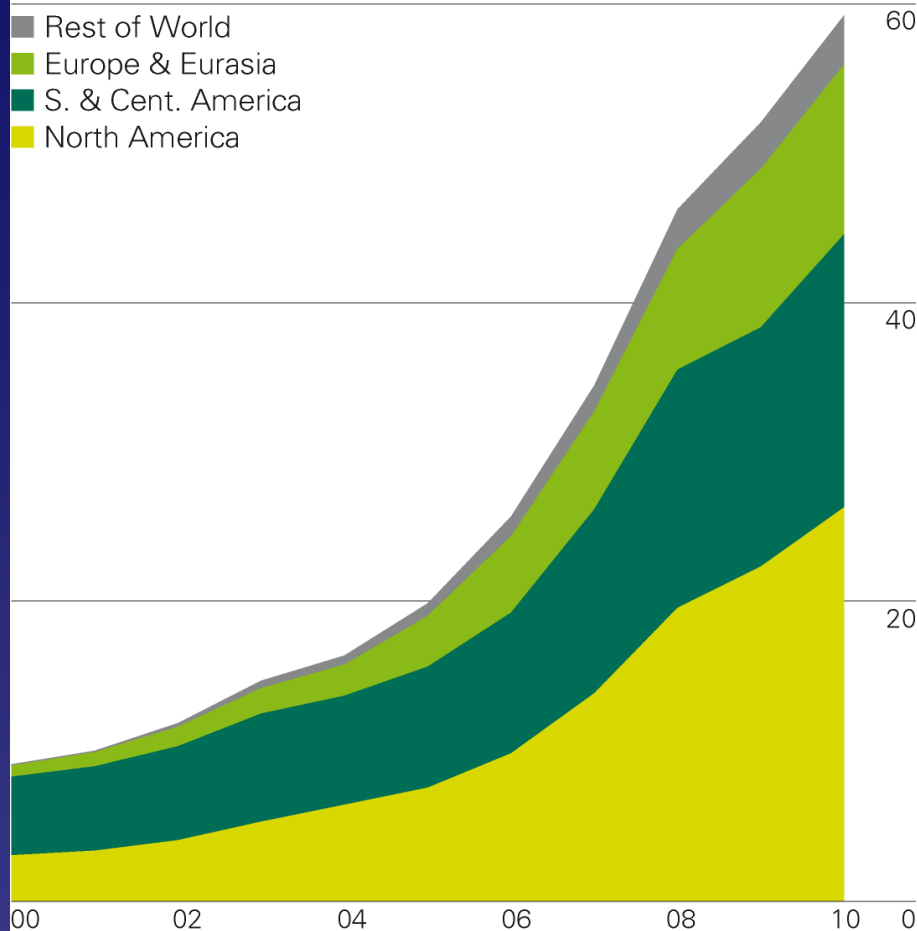
Renewable energy in power generation grew by 15.5% in 2010 and accounted for 1.3% of global primary energy consumption. Growth remains concentrated in the leading consuming centres: Europe and Eurasia, Asia Pacific, and North America. Renewable forms of energy account for 3.3% of global power generation, with the highest share (5.8%) in Europe and Eurasia.



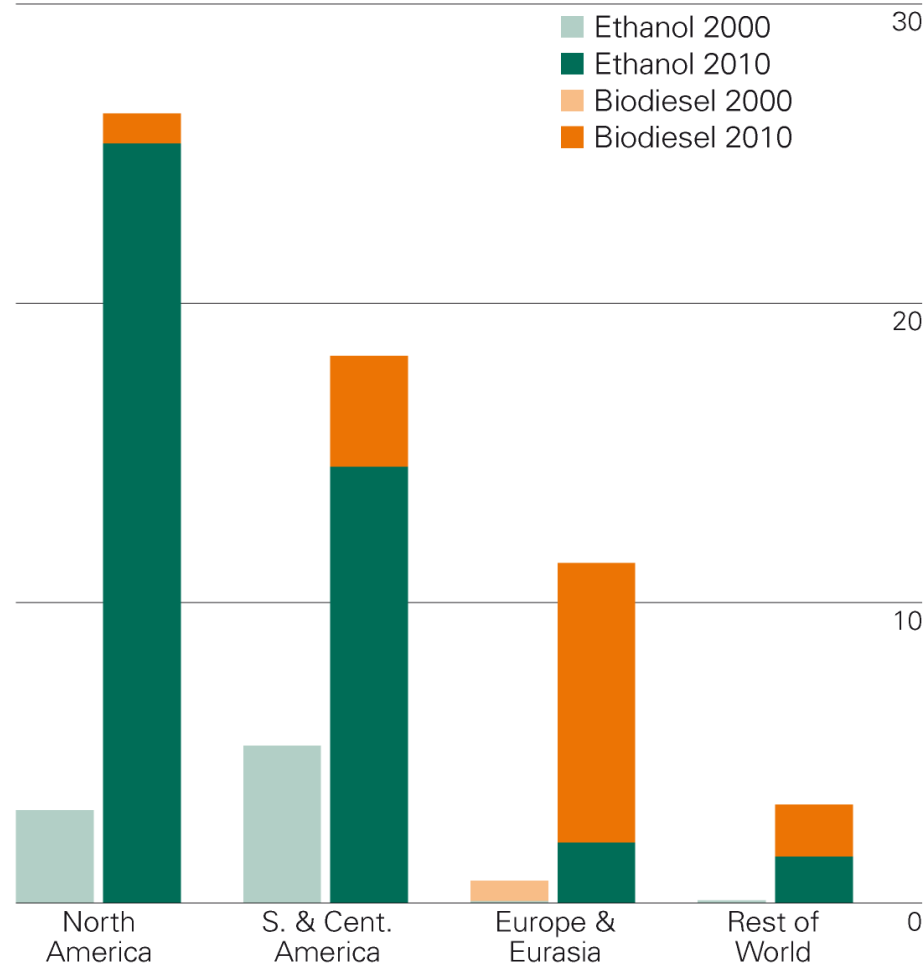
World biofuels production

Million tonnes oil equivalent

- Rest of World
- Europe & Eurasia
- S. & Cent. America
- North America



- Ethanol 2000
- Ethanol 2010
- Biodiesel 2000
- Biodiesel 2010



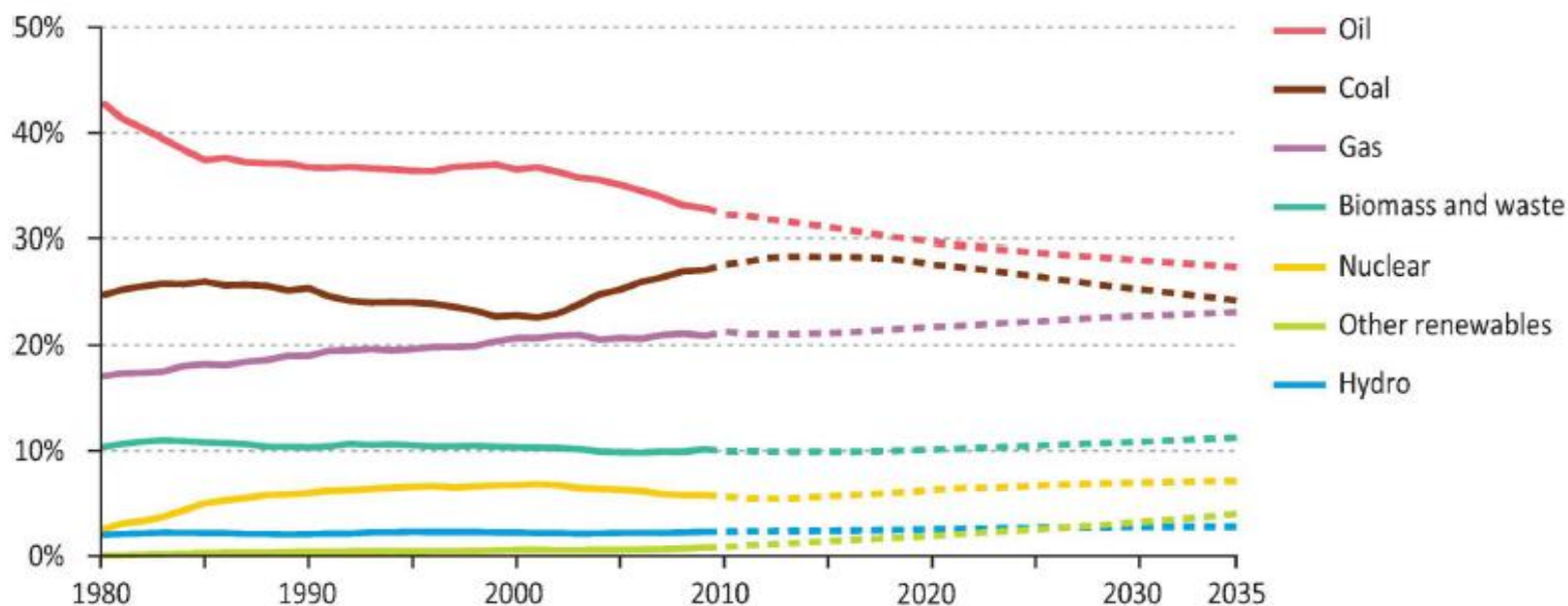
World biofuels production grew by 13.8% in 2010; biofuels accounted for 0.5% of global primary energy consumption. Growth was driven by North America (+17.7%) and South and Central America (+14.2%); these two regions accounted for three-quarters of global biofuels production. Ethanol accounts for nearly three-quarters of global biofuels production, and is dominant in North America and South and Central America; biodiesel is dominant in Europe and Eurasia.



Natural gas & renewables become increasingly important

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Figure 2.7: Shares of energy sources in world primary energy demand in the New Policies Scenario



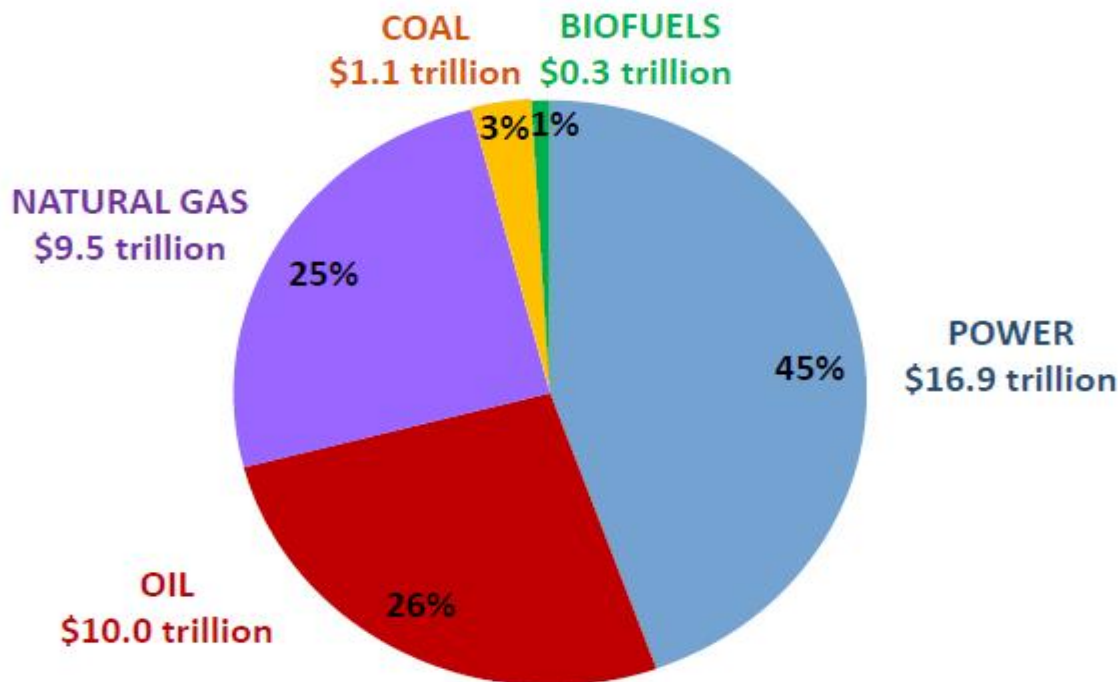
Global primary energy demand grows by 40% between 2009 & 2035, oil remains the leading fuel though natural gas demand rises the most in absolute terms



Investment: the essence of energy

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Cumulative investment in energy infrastructure, 2011-2035



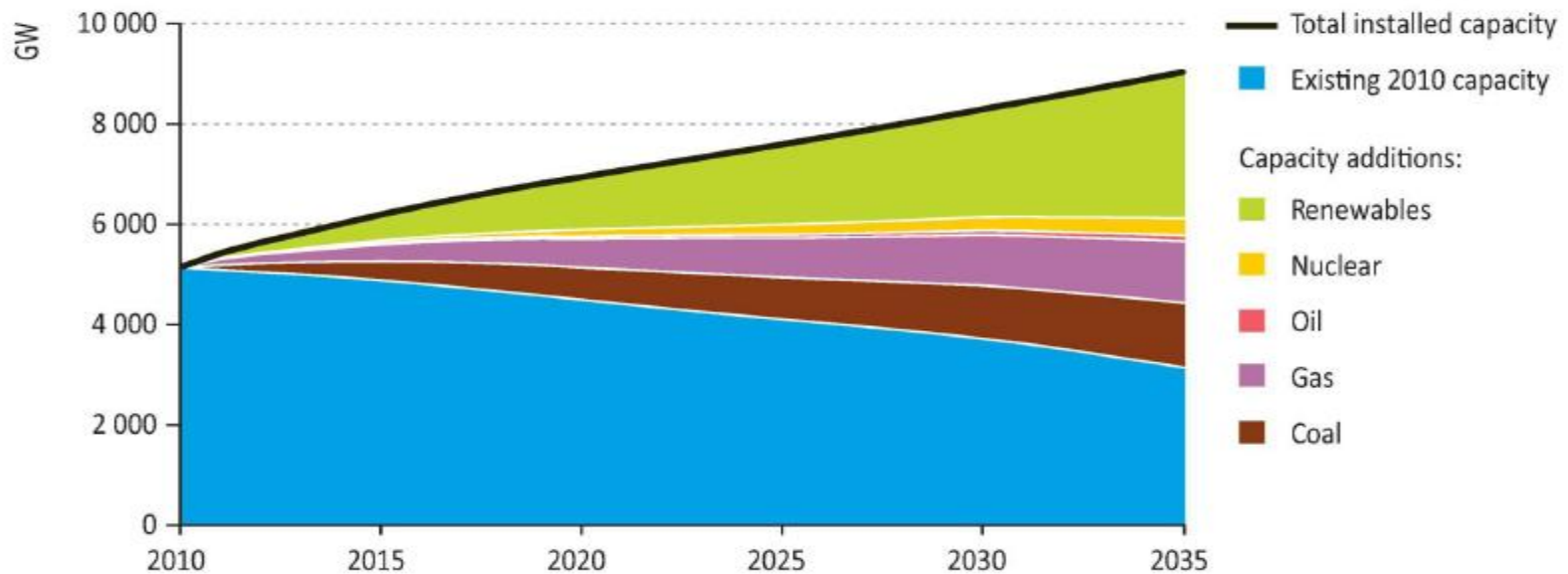
WEO-2011 will show that \$38 trillion of investment is required to meet projected energy demand through to 2035 and that investors in energy projects are facing a multitude of risks



Low-carbon power technologies come of age

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Figure 5.11: Global installed power generation capacity and additions by technology in the New Policies Scenario

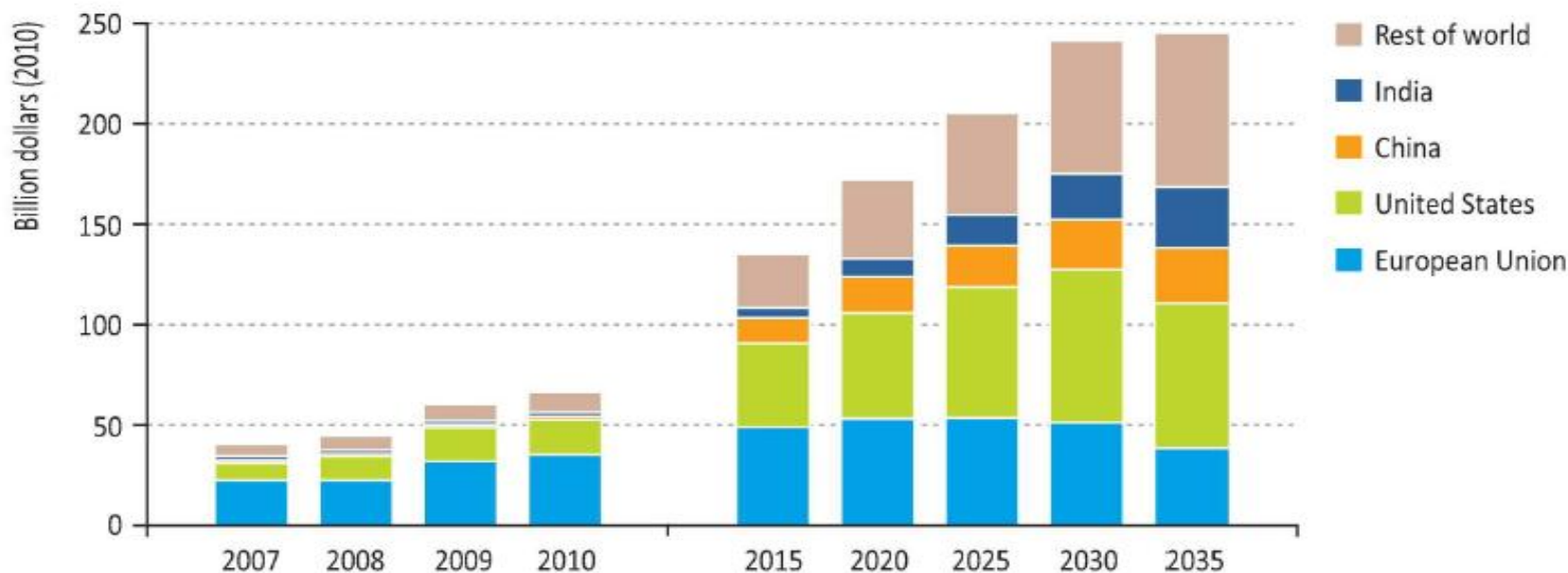


Renewables and nuclear power account for more than half of all the new capacity added worldwide through to 2035



The overall value of subsidies to renewables is set to rise

Figure 14.13: Global subsidies to renewables-based electricity and biofuels by region in the New Policies Scenario

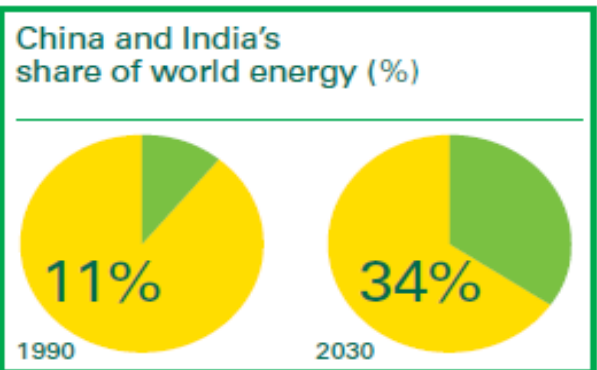
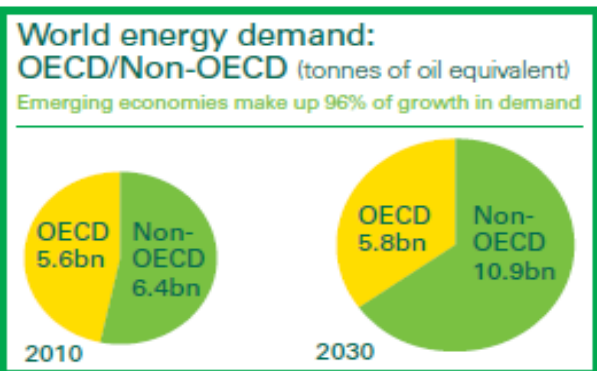
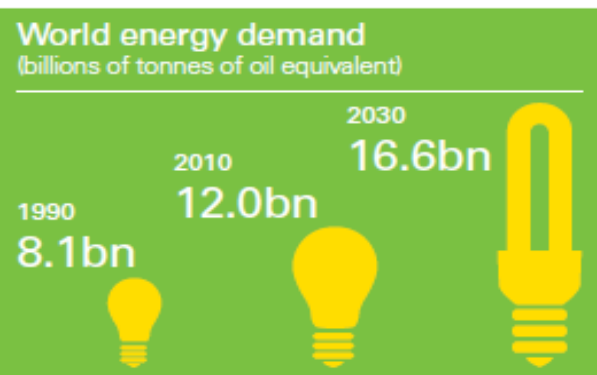


Renewable subsidies of \$66 billion in 2010 (compared with \$409 billion for fossil fuels), reach \$250 billion in 2035 as rising deployment outweighs improved competitiveness



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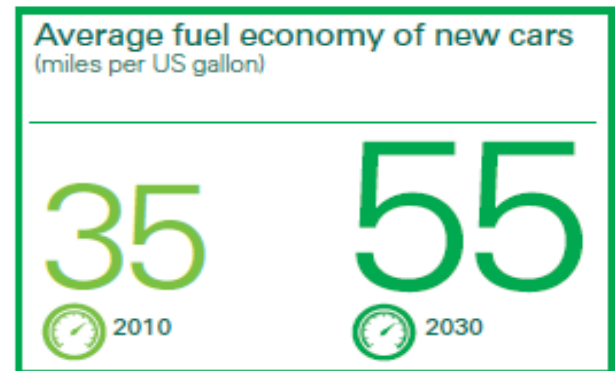
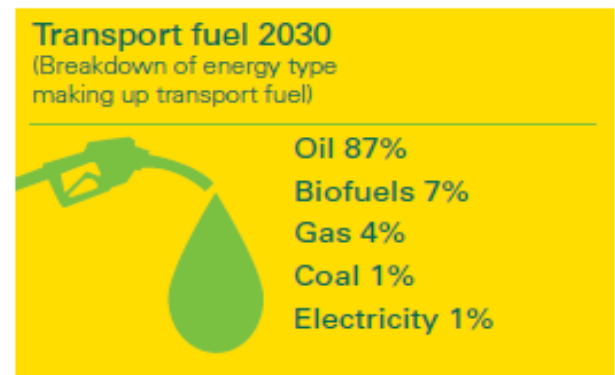
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Energy Outlook 2030

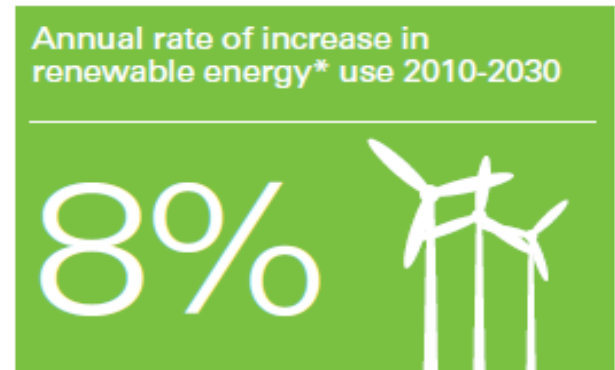
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Projections taken from BP's Energy Outlook 2030. The full report is available at www.bp.com/energyoutlook

*Renewable energy includes biofuels