



PHILIPPINE ENERGY PLAN 2009-2030

PHILIPPINE ENERGY OUTLOOK



Dir. JESUS T. TAMANG
Energy Policy and Planning Bureau



TOWARDS THE IDEAL ENERGY STATE IN 2030

Strategic Directions 2009-2030

GOP Directive

2008 Philippine
Energy Summit

PEP Consultations

Sustainable
Development
Framework

International
Frameworks on
Energy Cooperation

*Ensuring the
best energy
choices for a
better quality
of life*

Ensure energy security

*Pursue effective
implementation of energy
sector reforms*

*Implement social
mobilization and cross-
sector monitoring
mechanism*

1 Ensure energy security

- Accelerate the exploration and development of oil, gas and coal resources
- Intensify development and utilization of renewable and environment-friendly alternative energy resources/technologies
- Enhance energy efficiency and conservation
- Attain nationwide electrification
- Put in place long-term reliable power supply
- Improve transmission and distribution systems
- Secure vital energy infrastructure and facilities
- Maintain a competitive energy investment climate

2 Pursue effective implementation of energy sector reforms

- Monitor the implementation of, and if necessary, recommend amendments to existing energy laws
- Promote an efficient, competitive, transparent and reliable energy sector
- Advocate the passage of new and necessary laws

3 Implement social mobilization and cross-sector monitoring mechanism

- Expand reach through Information, Education and Communication
- Establish cross-sector monitoring mechanism in cooperation with other national government agencies, academe, LGUs, NGOs and other local and international organizations
- Promote good governance

PHILIPPINE ENERGY OUTLOOK 2009-2030

Energy Scenarios

SCENARIO	DEMAND PROGRAMS/TARGETS	SUPPLY ASSUMPTION
Reference (2008 base year)	REFERENCE SCENARIO <ul style="list-style-type: none"> ❖ 5% efficiency improvement for all demand sector ❖ CNG buses to increase by 200 units in 2010 ❖ Biodiesel blend (2% in 2009) ❖ Ethanol blend (10% in 2011) 	Existing + committed power projects
Low Carbon Scenario 1 (LCS 1)	ALTERNATIVE SCENARIO <ul style="list-style-type: none"> ❖ 10% efficiency improvement for all demand sectors ❖ CNG buses to increase to 10,000 units in 2030 	Double RE capacity
Low Carbon Scenario 2 (LCS 2)	<ul style="list-style-type: none"> ❖ Biodiesel blend (5% in 2010; 10% by 2015; 15% by 2020; 20% by 2025) ❖ Ethanol blend (10% in 2011; 15% in 2015; 20% in 2020) 	Double RE capacity + new and other emerging technology e.g. new RE, nuclear, etc.

MAJOR ECONOMIC PARAMETERS

Parameters	2008-2010	2011-2015	2016-2030
High GDP Growth	1.3 - 2009 2.6 - 2010	6%	6%
Mid GDP Growth		5%	5%
Low GDP Growth		4%	4%
Crude Oil Price per Barrel (US dollars)	70	80	90 - 120
Population	2%	2%	1%

Crude Oil Price per Milestone Year
 2011-2015 – 80
 2016-2020 – 90
 2021-2025 – 100
 2026-2030 – 120

GDP – Based on DBCC

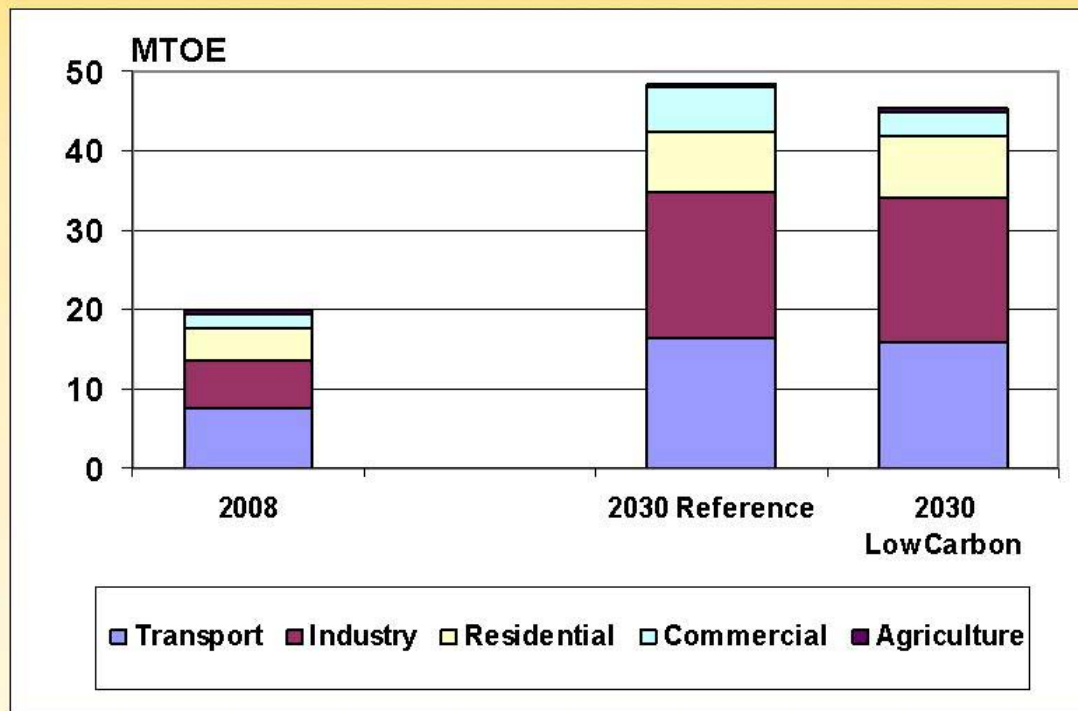
Reference: IEA WEO 2008 – 2030

Overall Observations

- Demand for final energy will at least double in the next 20 years driven by the requirements of the transport and industry sectors
- Oil will continue to be the major energy for transport while coal will remain the major fuel for power generation
- Renewable Energy and Energy Efficiency are key to reducing our dependency from fossil fuels and improve energy security
- Infrastructure and capacity build up are necessary to ensure delivery of energy services

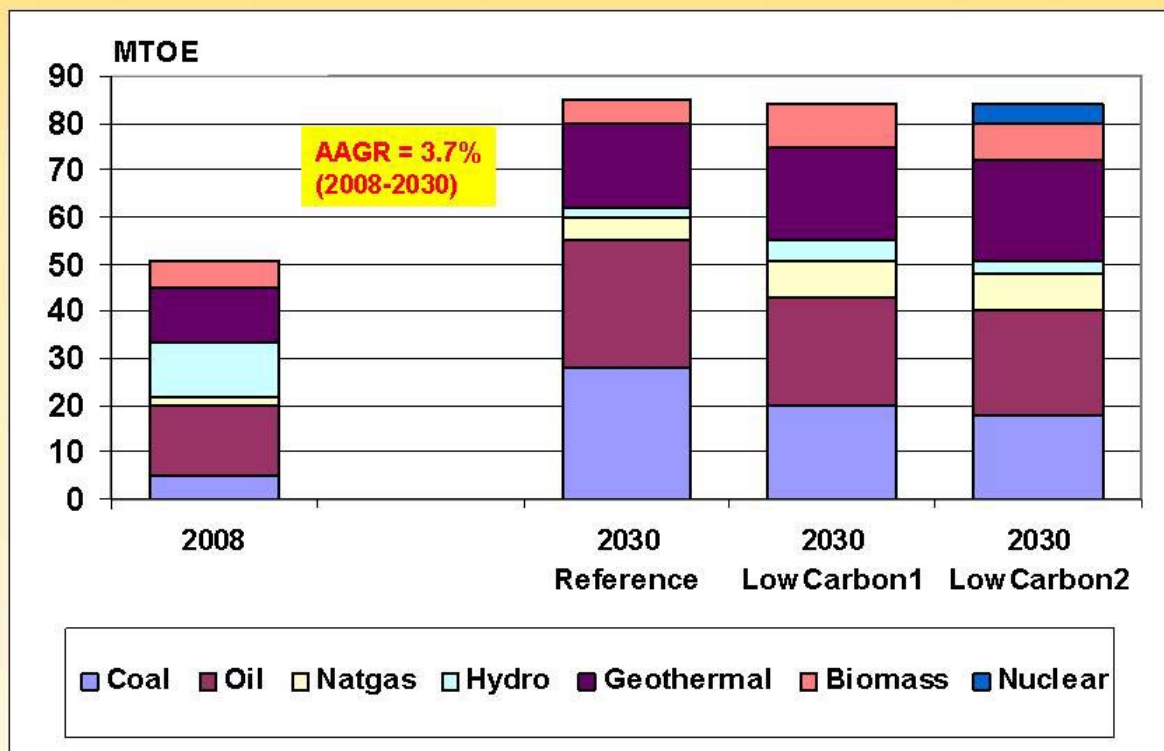
FINAL ENERGY DEMAND OUTLOOK

BY SECTOR, 2008-2030



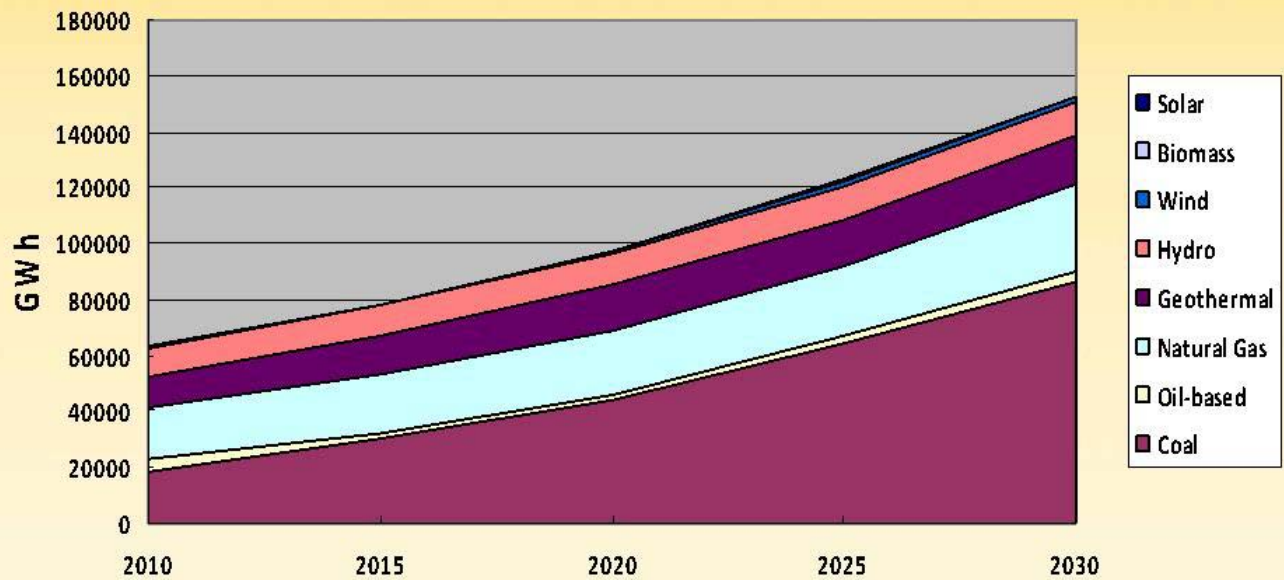
PRIMARY ENERGY SUPPLY OUTLOOK

BY FUEL, 2008-2030



POWER GENERATION, 2009-2030

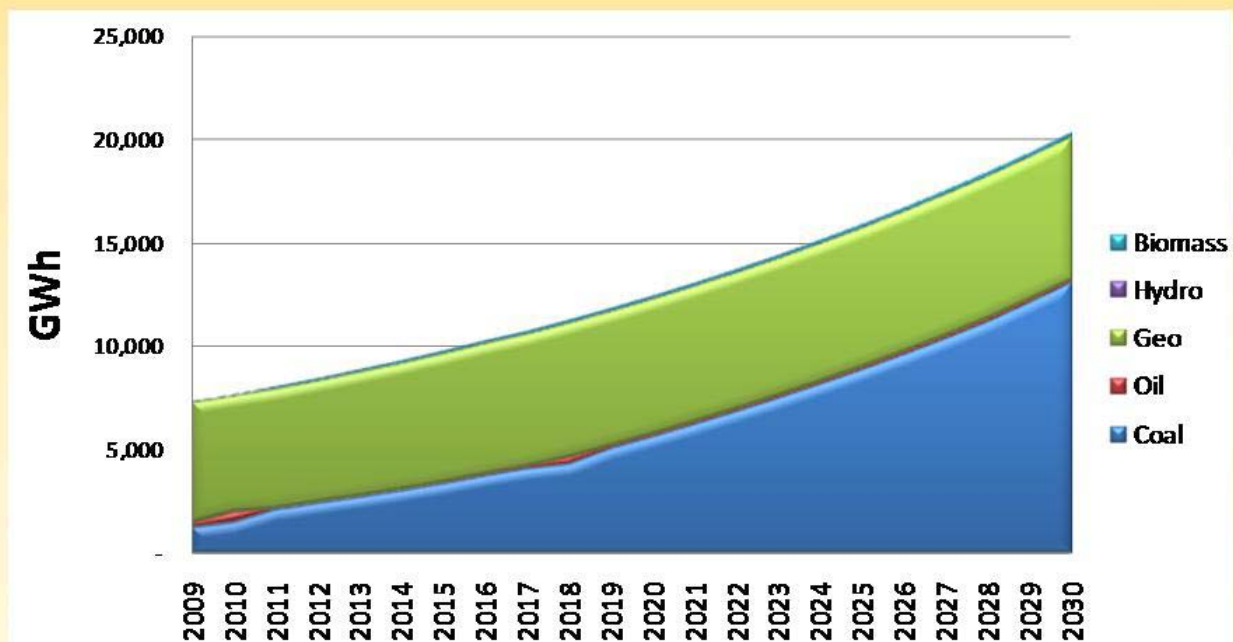
Reference Scenario



POWER GENERATION, Visayas

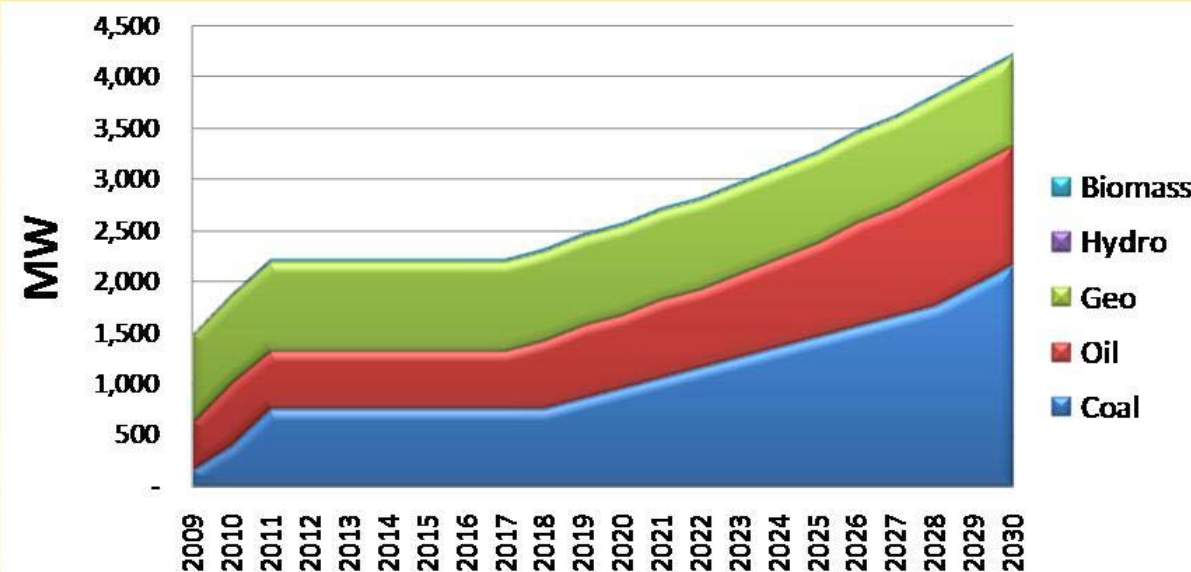
2009-2030

Reference Scenario

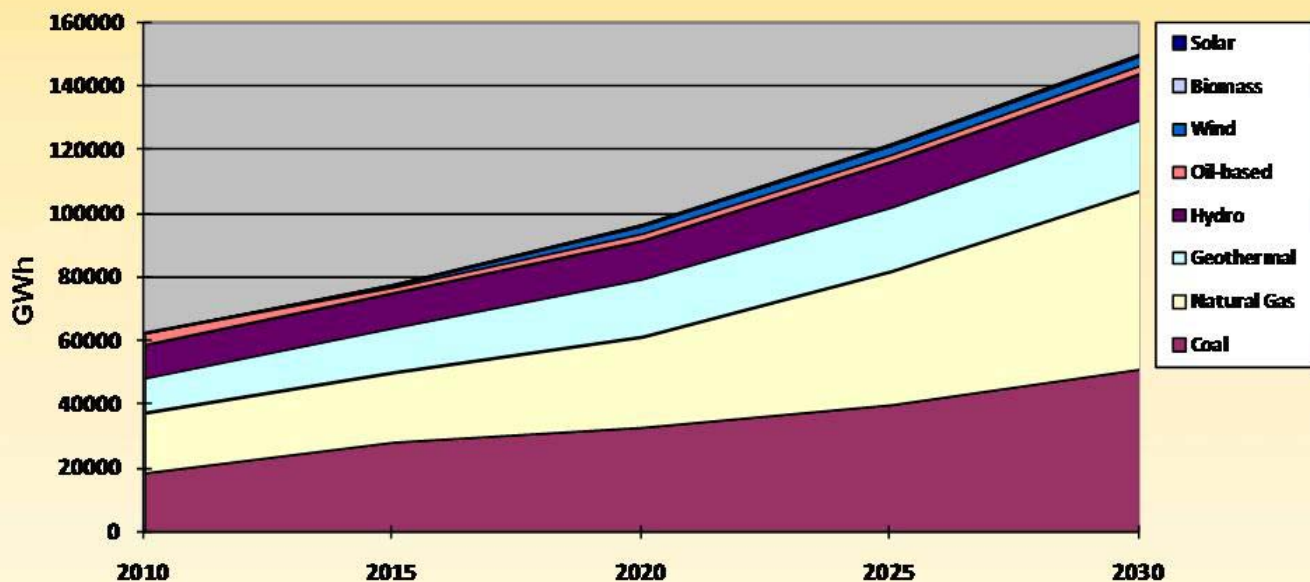




Reference Scenario

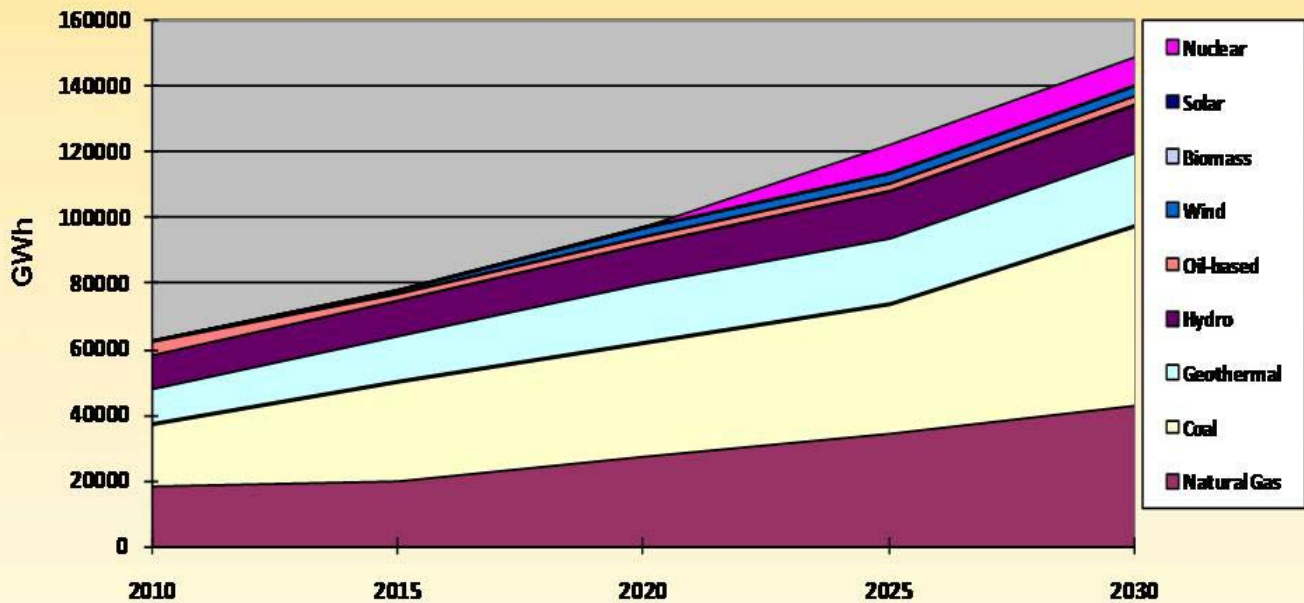


Low Carbon Scenario 1



POWER GENERATION, 2009-2030

Low Carbon Scenario 2



PHILIPPINE ENERGY PLAN

2009-2030

PHILIPPINE ENERGY OUTLOOK



Dir. JESUS T. TAMANG
Energy Policy and Planning Bureau