

Energy Programs, Development Plans and Investment Opportunities

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Energy Investment Forum and Stakeholders Conference

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Talking Points

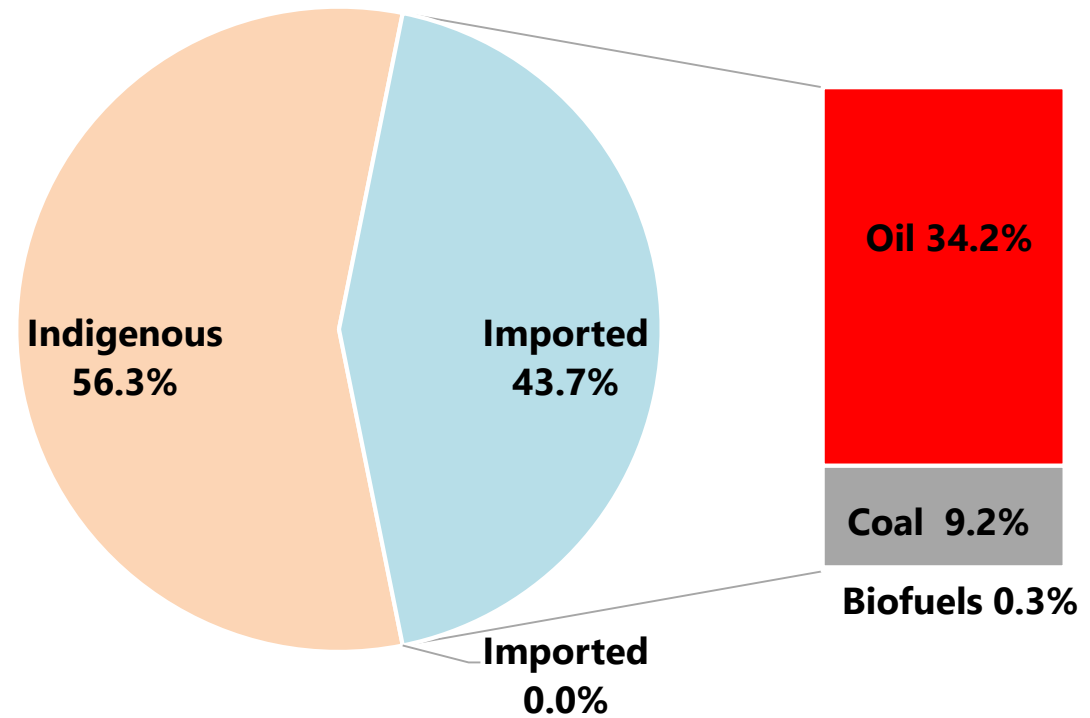
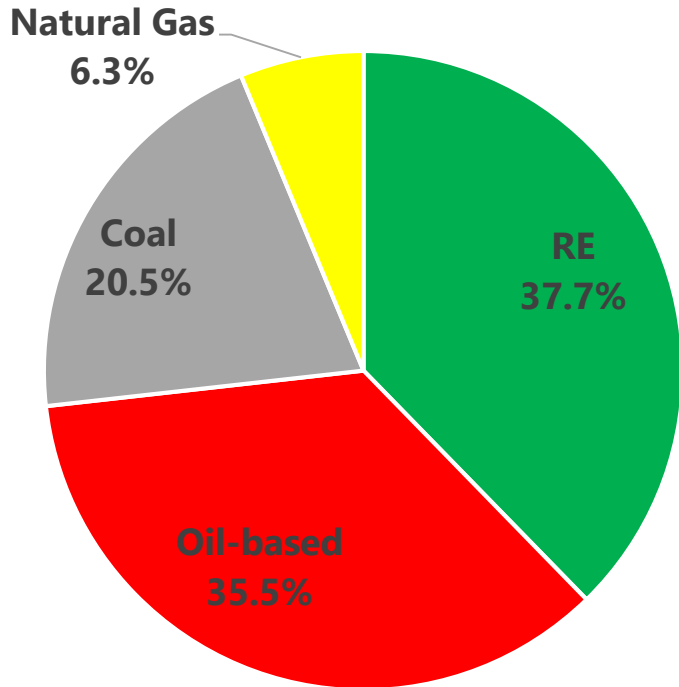
- I. Where are we now
 - A. 2016 Energy Supply
 - B. 2016 Power Capacity and Gross Generation
 - C. Energy Demand Outlook 2016-2040
 - D. Primary Energy Mix 2016-2040
 - E. Energy Supply Outlook 2016-2040

- II. Where we are headed
 - A. Strategic directions
 - B. DOE's Nine Point Agenda
 - C. Investment Opportunities

- III. Power Development Plans



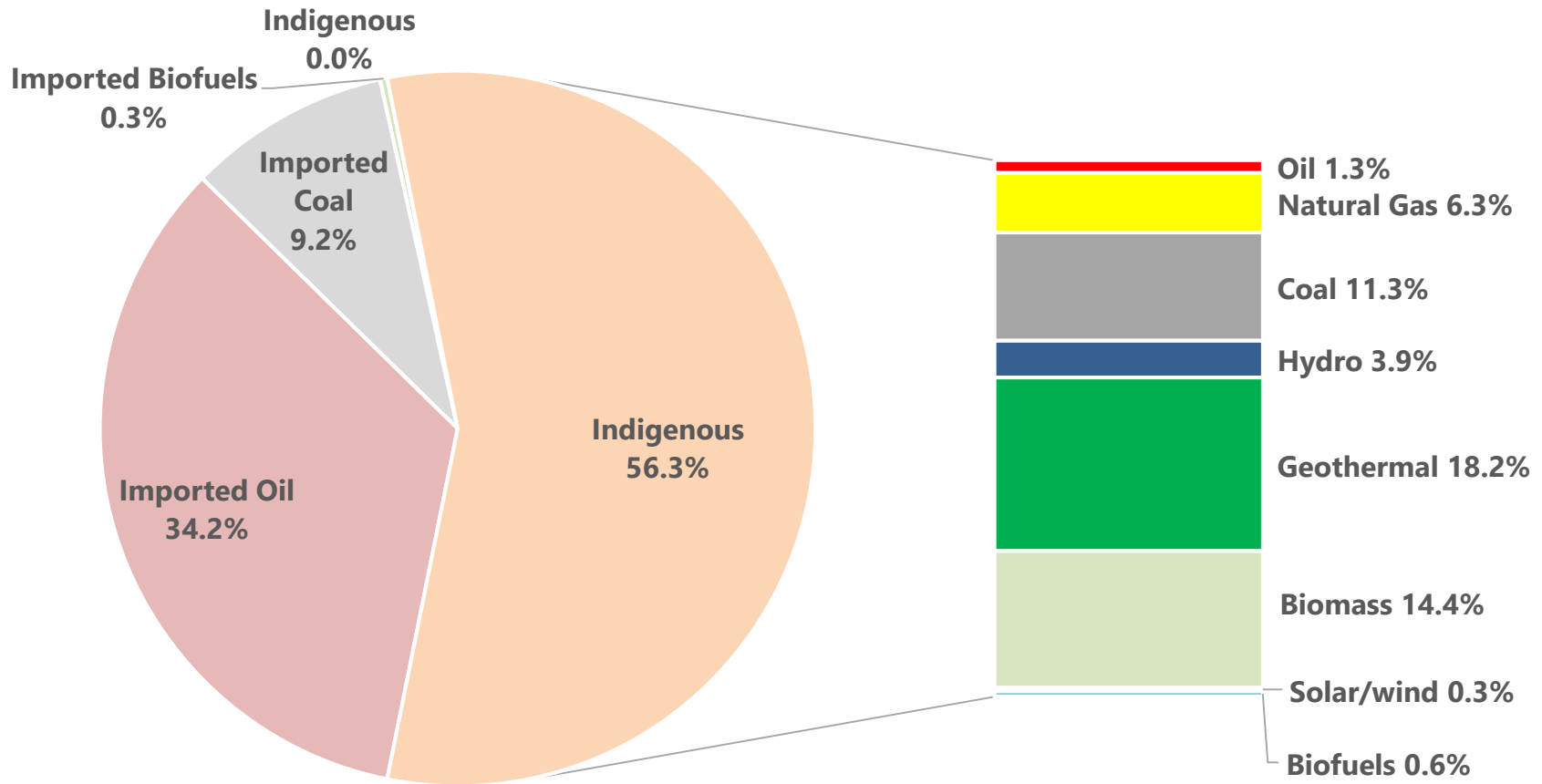
2016 Energy Supply



Total Energy:	52.21 MTOE
Self-sufficiency:	56.3%
Renewable Energy:	37.7%
RE + Nat Gas:	44.0%



Where we are now

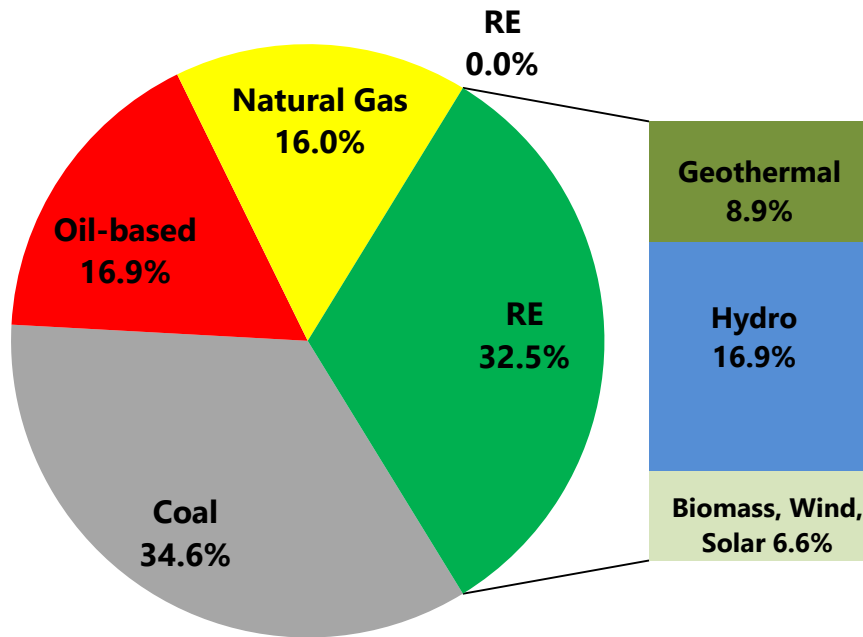


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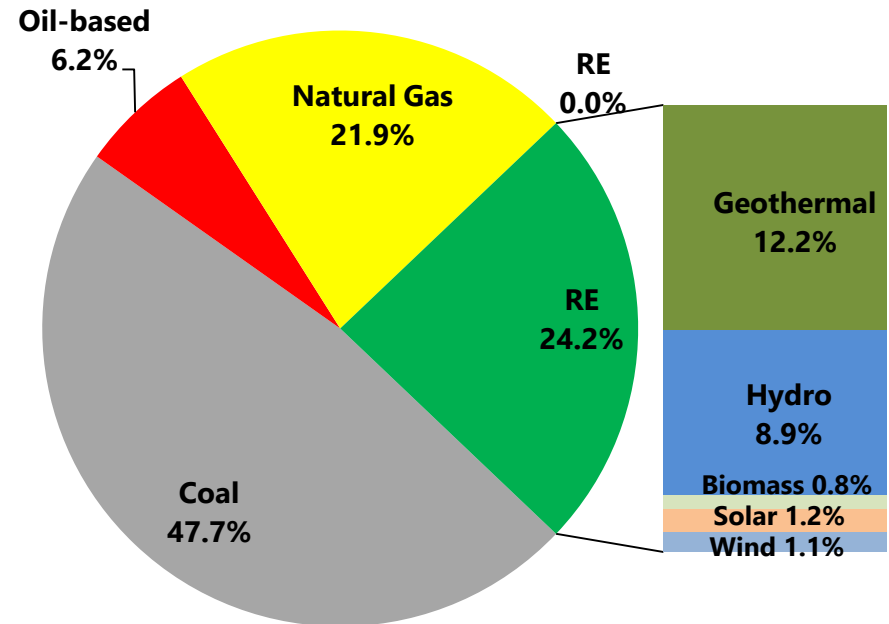
2016 Power Capacity and Gross Generation

Installed Capacity



Total Installed Capacity: 21,424 MW
Renewable Energy Share: 32.5%

Gross Generation

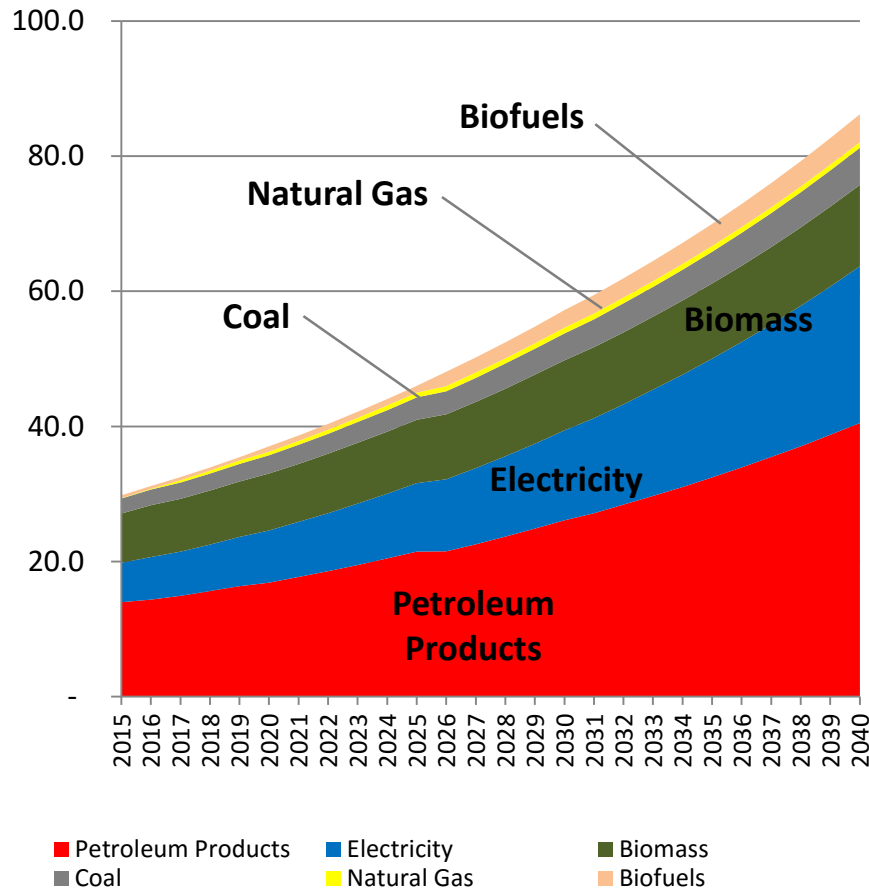


Total Generation: 90,797 GWh
Renewable Energy: 24.2%
RE + Nat Gas: 46.1%

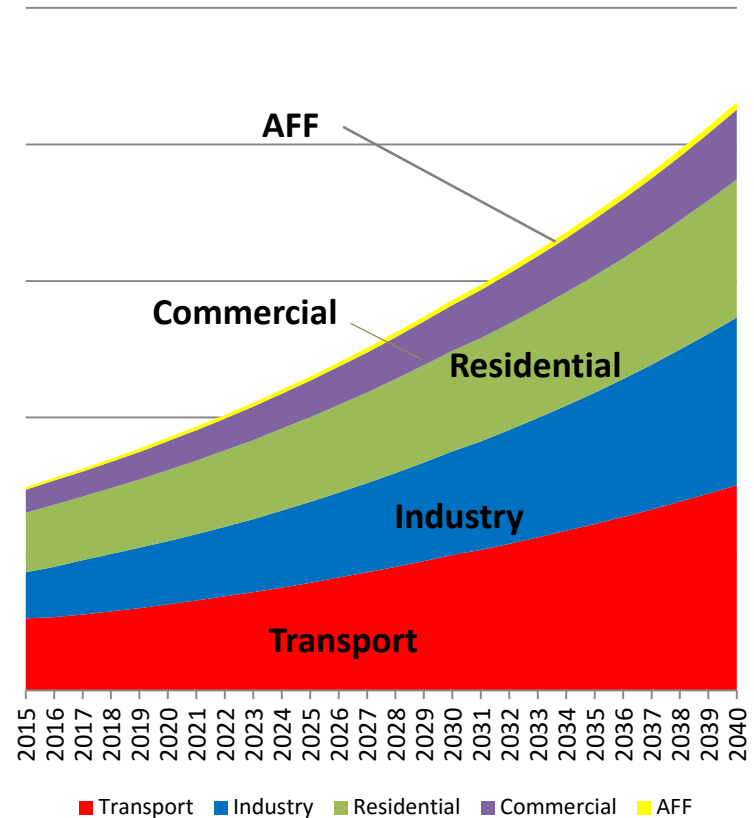


Energy Demand Outlook 2016-2040

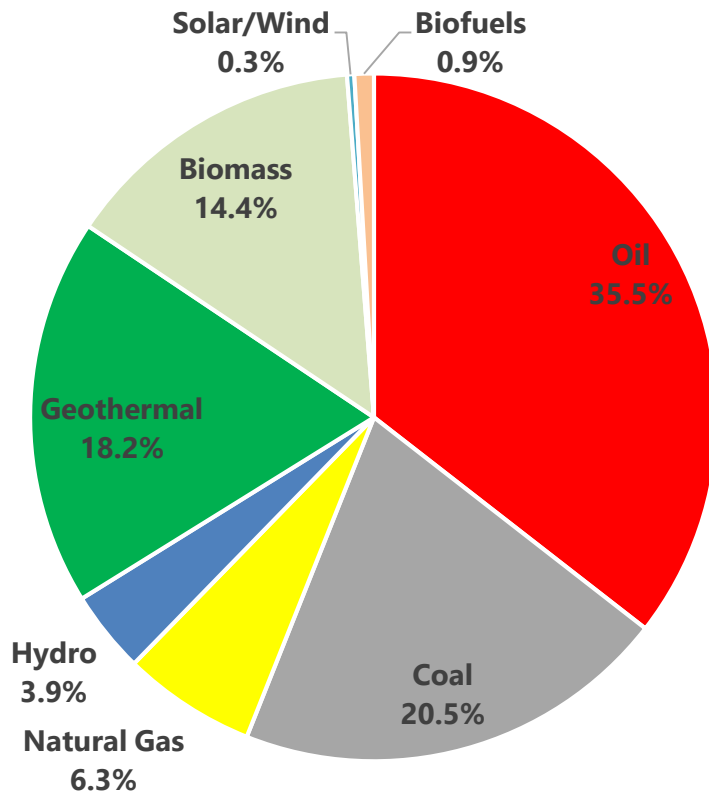
By Fuel Type



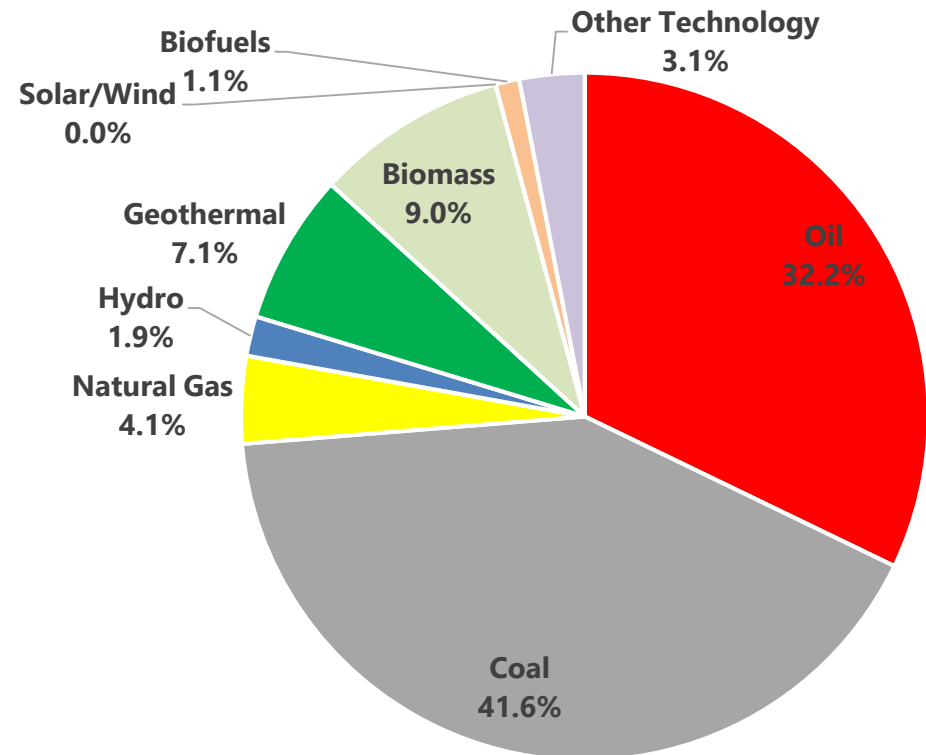
By Sector



Primary Energy Mix 2016-2040



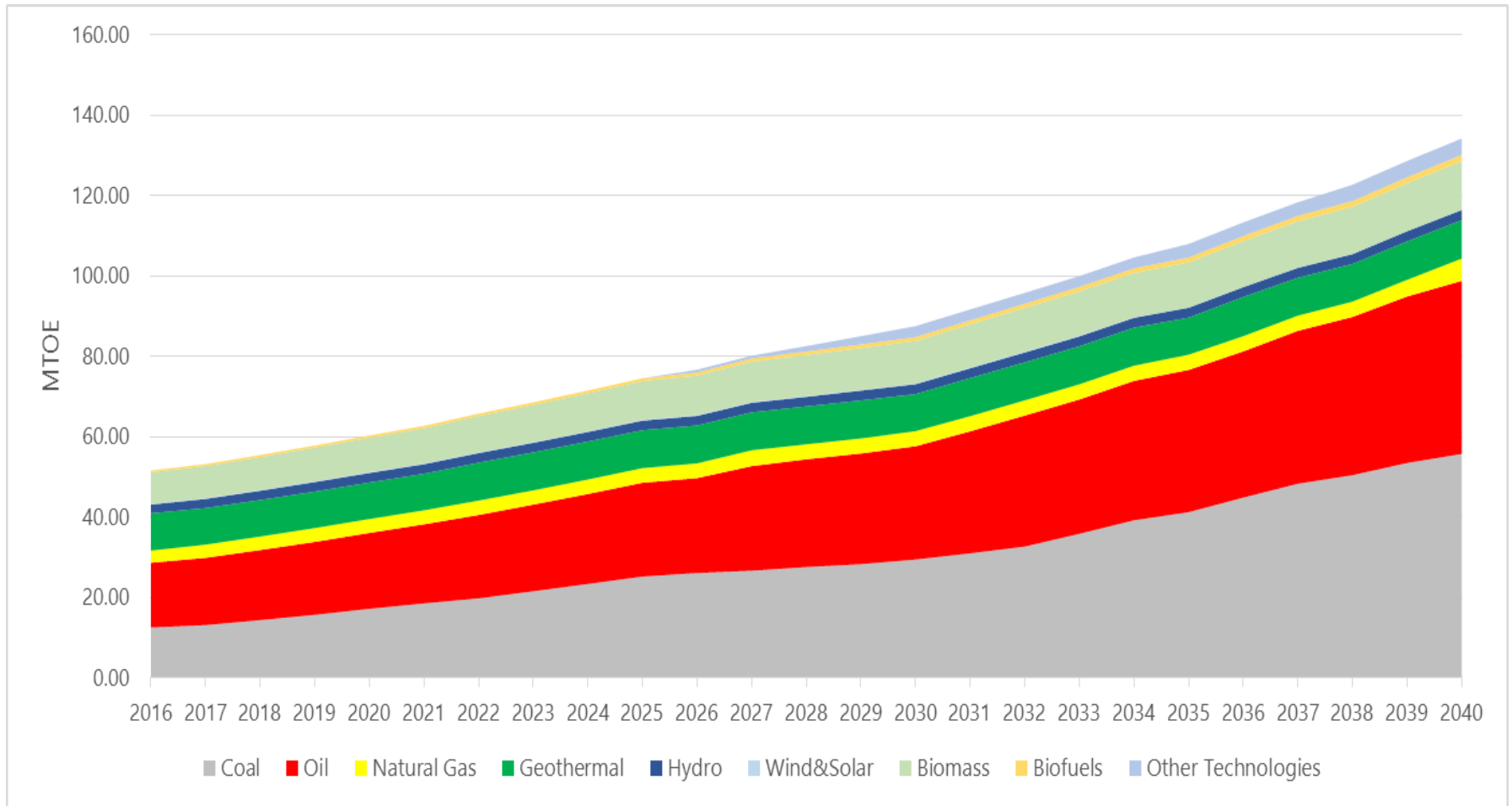
2016 Actual (prelim)
Total Energy: 52.2 MTOE



2040 Outlook
Total Energy: 134.2 MTOE



Energy Supply Outlook 2016-2040



Strategic Directions 2017 – 2040

1

**ENSURE
ENERGY
SECURITY**

2

**EXPAND
ENERGY
ACCESS**

3

**PROMOTE A
LOW CARBON
FUTURE**

4

**STRENGTHEN
COLLABORATION
AMONG ALL
GOVERNMENT
AGENCIES
INVOLVED IN
ENERGY**

5

**IMPLEMENT,
MONITOR AND
INTEGRATE
SECTORAL AND
TECHNOLOGICAL
ROADMAPS AND
ACTION PLANS**

6

**ADVOCATE THE
PASSAGE OF THE
DEPARTMENT'S
LEGISLATIVE
AGENDA**

7

**STRENGTHEN
CONSUMER
WELFARE AND
PROTECTION**

8

**FOSTER
STRONGER
INTERNATIONAL
RELATIONS AND
PARTNERSHIPS**



Strategic Directions 2017 – 2040

1 ENSURE ENERGY SECURITY

- Audit and assessment for power generation, transmission and distribution facilities
- Appropriate portfolio of installed and dependable power capacity mix of 70% baseload, 20% mid-merit and 10% peaking plant categories matching peak demand and reserves
- Build an LNG Terminal for a future “Clean Energy City”
- Accelerate total privatization of PSALM assets
- Improve reliability, availability and resiliency of energy infrastructure and facilities
- Conduct energy contracting rounds



Strategic Directions 2017 – 2040

2 EXPAND ENERGY ACCESS TO ENSURE AFFORDABLE, RELIABLE, SUSTAINABLE AND MODERN ENERGY FOR ALL

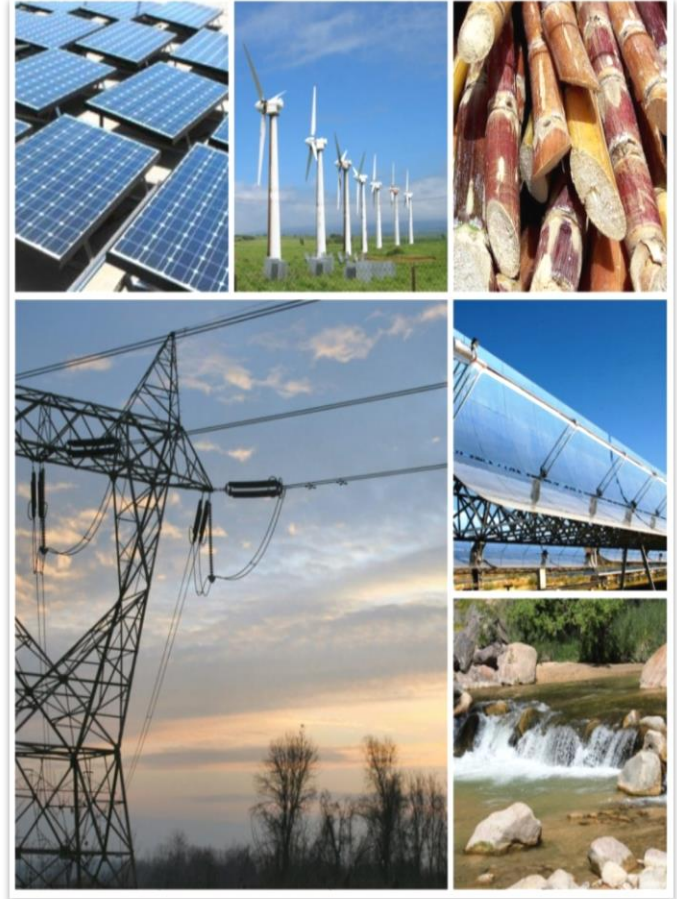
- Achieve 100% electrification of targeted identified unelectrified households in all three major islands by 2022
- Connect the Mindanao grid with the interconnected Visayas and Luzon grids by 2020 to increase power supply reliability and resilience



Strategic Directions 2017 – 2040

3 PROMOTE A LOW CARBON FUTURE

- Increase RE Capacity by 2030 (based on 2010 level)
- Promote technology innovation through research, development, demonstration and deployment
 - Clean, efficient and smart energy technologies
 - Infrastructure for next generation vehicles



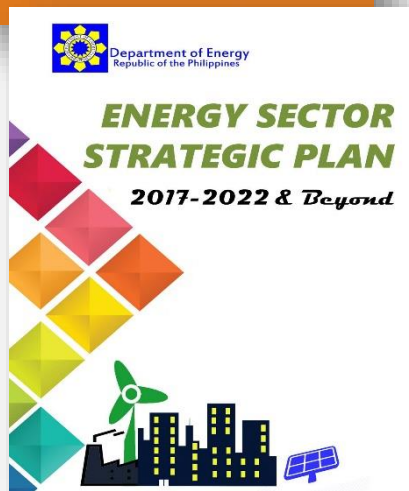
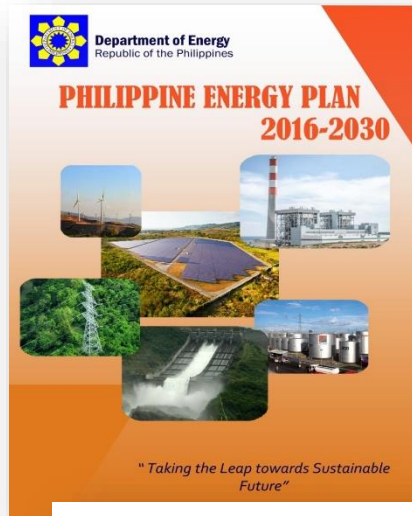
Strategic Directions 2017 – 2040

4 STRENGTHEN COLLABORATION BUILDING AMONG ALL GOVERNMENT AGENCIES INVOLVED IN ENERGY AND ENERGY-RELATED ISSUES

- Implement Executive Order (EO) 30 on Energy Projects of National Significance (EPNS)
- Energy Virtual One Shared System (EVOSS) platform for streamlined permitting
- Capacity and competency building of human resources of the “Energy Family” in the organizational, administrative, financial and legal areas



Strategic Directions 2017 – 2040



5 IMPLEMENT, MONITOR AND INTEGRATE SECTORAL AND TECHNOLOGICAL ROADMAPS AND ACTION PLANS

- Alternative fuels and energy technologies
- Energy efficiency and conservation
- Oil, gas and coal resource development
- Renewable energy
- Downstream oil, gas and coal
- Power and electrification
- ICT for energy



Strategic Directions 2017 – 2040

6

ADVOCATE THE PASSAGE OF THE DEPARTMENT'S LEGISLATIVE AGENDA AND ISSUANCE OF PERTINENT RULES AND REGULATION

- Energy Efficiency and Conservation (EE&C), Natural Gas, Liquefied Petroleum Gas (LPG), Petroleum Upstream Regulation
- Review of existing laws such as EPIRA, Downstream Oil Industry, Renewable Energy



Strategic Directions 2017 – 2040

7

STRENGTHEN CONSUMER WELFARE AND PROTECTION THROUGH MULTI-SECTORAL MULTIMEDIA IEC PROGRAMS

- Scale up the *E-Power Mo, E-Safety Mo, E-Secure Mo, E-Diskarte Mo* campaign
- Integrate energy concepts in curriculum for public school students through seminars and field visits
- Promote alternative fuel vehicles and emerging energy technologies



Strategic Directions 2017 – 2040

8 FOSTER STRONGER INTERNATIONAL RELATIONS AND PARTNERSHIPS

- Bilateral and multi-lateral energy cooperation
- Facilitate free trade agreements on energy trade and services
- UN's Sustainable Energy for All (SE4All)





DOE's NINE POINT ENERGY AGENDA



**ACCESS TO BASIC ELECTRICITY
FOR ALL FILIPINOS BY 2022**



**ADOPTING A TECHNOLOGY NEUTRAL
APPROACH FOR AN OPTIMAL ENERGY MIX**



**IMPROVING THE SUPPLY OF POWER THAT
IS RELIABLE, TO MEET DEMAND NEEDS BY
2040**



**DEVELOPING LNG NEEDS FOR THE FUTURE
IN ANTICIPATION OF THE MALAMPAYA
DEPLETION**



**FACILITATING THE COMPLETION OF
TRANSMISSION PROJECTS BY 2020**



**PRO-CONSUMER DISTRIBUTION
FRAMEWORK FOR AFFORDABILITY,
CHOICE AND TRANSPARENCY**



**STREAMLINING DOMESTIC POLICY
TO CUT RED TAPE**



**DOE TO DELIVER ON PSALM
PRIVATIZATION**



**PROMOTING EFFICIENT USE OF POWER
AMONG CONSUMERS THROUGH AN IEC**



Thank You!



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