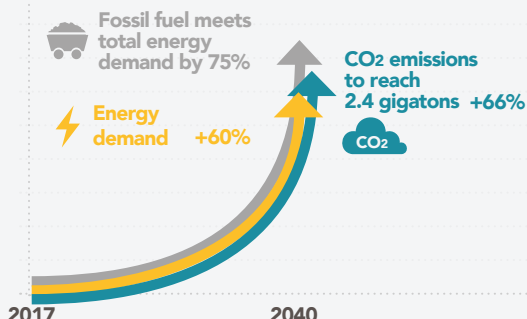




Becoming green is not an obstacle to growth...

Southeast Asia is a diverse and dynamic region with increasing economic weight, but also a growing carbon footprint ¹



It is the only region in the world with a growing share of coal-fired power generation originating mainly from Indonesia, the Philippines and Vietnam with: ²

49GW
New coal power plants in the pipeline



...it is a smart investment

ENERGY INDEPENDENCE

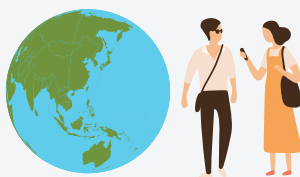
Fossil fuel import bill



Investing in renewable energy means cutting annual fossil fuel imports bill from 300 to 100 million USD by 2040³

POLITICAL STABILITY

Youth is concerned about climate change: **60% live in Asia**



By 2050, millennials will control USD 30 trillion of world's private wealth⁴

HEALTHY ENVIRONMENT

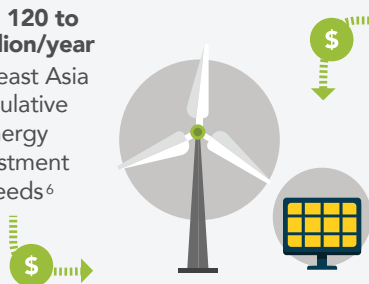
Air pollution is a political issue



Vietnam: 60,000 deaths each year
Philippines: world's 3rd highest mortality rate
Indonesia: 11th most polluted capital city⁵

COMPETITIVENESS & GREEN CAPITAL ACCESS

USD 120 to 150 billion/year
Southeast Asia cumulative energy investment needs⁶



International Financial Institutions now restrict coal financing and include climate risk into lending decisions

ECONOMIC OPPORTUNITIES

Renewable energy is a high rewards choice



+2.2 million jobs created in RE in Southeast Asia⁷



New solar PV cheaper than new coal plants by 2021⁸

MITIGATE CLIMATE RISK

1998 – 2017 global ranking of countries most affected by flood, extreme heat, drought, water and food shortage...⁹



5th Philippines
9th Vietnam
50th Indonesia

INTERNATIONAL CREDIBILITY

Fulfilling national commitments to reduce green house gas emissions (below Business As Usual by 2030)¹⁰



Reduction by:
29% Indonesia
8% Vietnam
70% Philippines

GLOBAL RELEVANCE

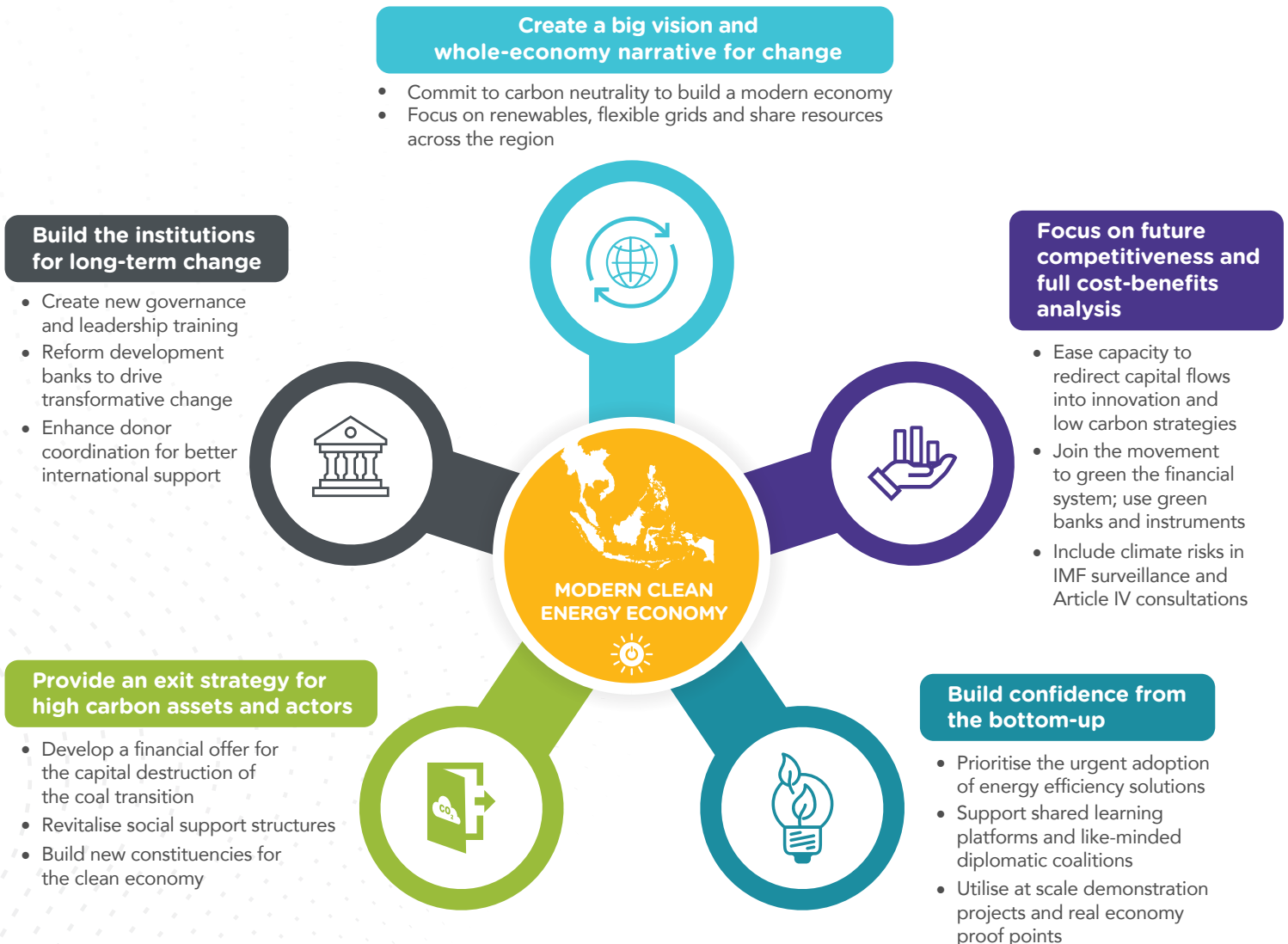
Carbon neutrality by 2050 is the new normal



FIVE STEPS TO BUILD A COMPETITIVE ZERO CARBON ECONOMY

2020s MUST BE THE DECADE OF ACTION IN SOUTHEAST ASIA

With visionary political leadership, Southeast Asia has the opportunity to transform its energy systems and economies to build a prosperous future for all citizens.



Explore further how to implement the 5 steps. Read

"SEA CHANGE: Delivering a zero carbon economy in southeast Asia", final SHIFTSEA report by E3G
<https://www.e3g.org/library/executive-summary-sea-change-deliveringzero-carbon-economy-southeast-asia>



Shifting Financial Flows to Low Carbon Development in Southeast Asia

SEforALL.org/shift
#SHIFTSEA

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based on a decision of the German Bundestag