

ENERMED Training Workshop

Future European Natural Gas Supply Needs, Import Sources and Routes

SESSION VII

Organized by OME
Observatoire Méditerranéen de
l'Energie
Paris, 6-7 February 2014



Context

The promotion of natural gas use has been a clear target of energy policies in Europe, and especially in the EU, in the past decades. But with rapid increase in demand and declining domestic production, security of gas supply has become a key issue for European gas importing countries. Moreover, the US shale gas revolution, the Fukushima accident in addition to the prolonged economic crisis severely troubled the dynamic of the European gas market. Today, it is still not clear whether the EU and/or Europe consider or will consider gas as a bridge or low energy carbon energy source.

On the natural gas supplier side, it requires decisions about below the ground factors as well as above the ground factors to be taken (in due time) to transform export potential into physical exports. Naturally, assessing export potential of each supplier country and how much of that potential would eventually come to Europe and EU-27, both by pipeline and via LNG under alternative scenarios, involves numerous uncertainties to be considered.

By taking into account of the above mentioned issues, the main goal of this training session is to demonstrate in quantitative terms how the future European gas import needs could be balanced with export potential of suppliers.

Objectives

- *Assess the current situation and future prospects of the domestic natural gas production and demand in Europe.*
- *Evaluate the European natural gas import needs under two alternative gas demand scenarios.*
- *Assess natural gas export potential of existing and potential suppliers of Europe*
- *Identify how much of that potential would eventually come to Europe and through which routes.*

Programme

Day I- 6 February		9:30 - 17:30
9:30 - 10:00	<i>Welcome of Participants</i> ENERMED Overview: Houda BEN JANNET ALLAL , OME	
	Opening Session	
10:00 - 11:00	World Gas Market – Overview and perspectives Guest speaker	

Session I – Europe's Future Natural Gas Import Requirements

11:00 - 11:30	<p>Introduction</p> <p>Objectives, methodology and data sources, geographical coverage</p> <p>Sohbet KARBUZ, OME</p>
11:30 - 11:45	<p><i>Coffee Break</i></p>
11:45 - 13:00	<p>European Natural Gas Demand</p> <p>Place of natural gas in Europe, past evolution and future prospects of gas demand, comparison of OME forecasts with other forecasts</p> <p>Bruno CASTELLANO, OME</p>
13:00 - 14:00	<p><i>Lunch</i></p>
14:00 - 14:45	<p>European Natural Gas Demand (cont'd)</p> <p>Bruno CASTELLANO, OME</p>
14:45 - 16:00	<p>European Domestic Natural Gas Production</p> <p>Past, present and future, analysis by country</p> <p>Sohbet KARBUZ, OME</p>
16:00 - 16:15	<p><i>Coffee Break</i></p>
16:15 - 17:30	<p>European Natural Gas Import Requirements</p> <p>Evolution past to present and future prospects</p> <p>Sohbet KARBUZ, OME</p>
19:00 - 21:00	<p><i>Dinner hosted by OME</i></p>

Day II- 7 February

09:30 - 17:30

Session II – Quantitative Assessment of Europe's Future Gas Supply Sources and Routes

9:30 - 10:00	<p>Introduction</p> <p>Objectives and methodology used</p> <p>Sohbet KARBUZ, OME</p>
10:00 - 11:45	<p>In-depth review by supplier: Russia and Norway</p> <p>Analysis of current and potential gas supply to Europe</p> <p>Sohbet KARBUZ, OME</p> <p><i>Coffee Break (15mn during the session)</i></p>
11:45 - 13:00	<p>In-depth review by supplier: Africa</p> <p>Bruno CASTELLANO, OME</p>

13:00 - 14:00

Lunch

14:00 - 15:15

In-depth review by supplier: Middle East
Focus on East Mediterranean

Sohbet KARBUZ, OME

15:15 - 16:00

In-depth review by supplier: Caspian Region

Sohbet KARBUZ, OME

16:00 - 16:15

Coffee Break

16:15 - 16:45

In-depth review by supplier: South America

Bruno CASTELLANO, OME

16:45 - 17:15

In-depth review by supplier: North America

Sohbet KARBUZ, OME

17:15 – 17:30

Evaluation & Closing

Houda ALLAL, Bruno CASTELLANO, Sohbet KARBUZ

About OME

Created in 1988, OME is an Association whose main goal is to promote co-operation and dialogue, information and training in the field of energy in the Mediterranean. OME gathers the major energy companies operating on the Mediterranean shores.

Think Tank on energy for the Mediterranean Region, OME undertakes studies, provides consultant services, information and statistics and contributes in identifying and analyzing the stakes and challenges related to energy in the Mediterranean Region.

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