



# International Gas Union



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## IGU during the Argentine Triennium

**Peter K. Storm**

Secretary General of IGU

**ECE Working Party on Gas  
Geneva, Switzerland – 23-24 January 2007**



# Agenda



- **About IGU**
- **The New Triennium (2006-09)**
- **Some IGU Statements**



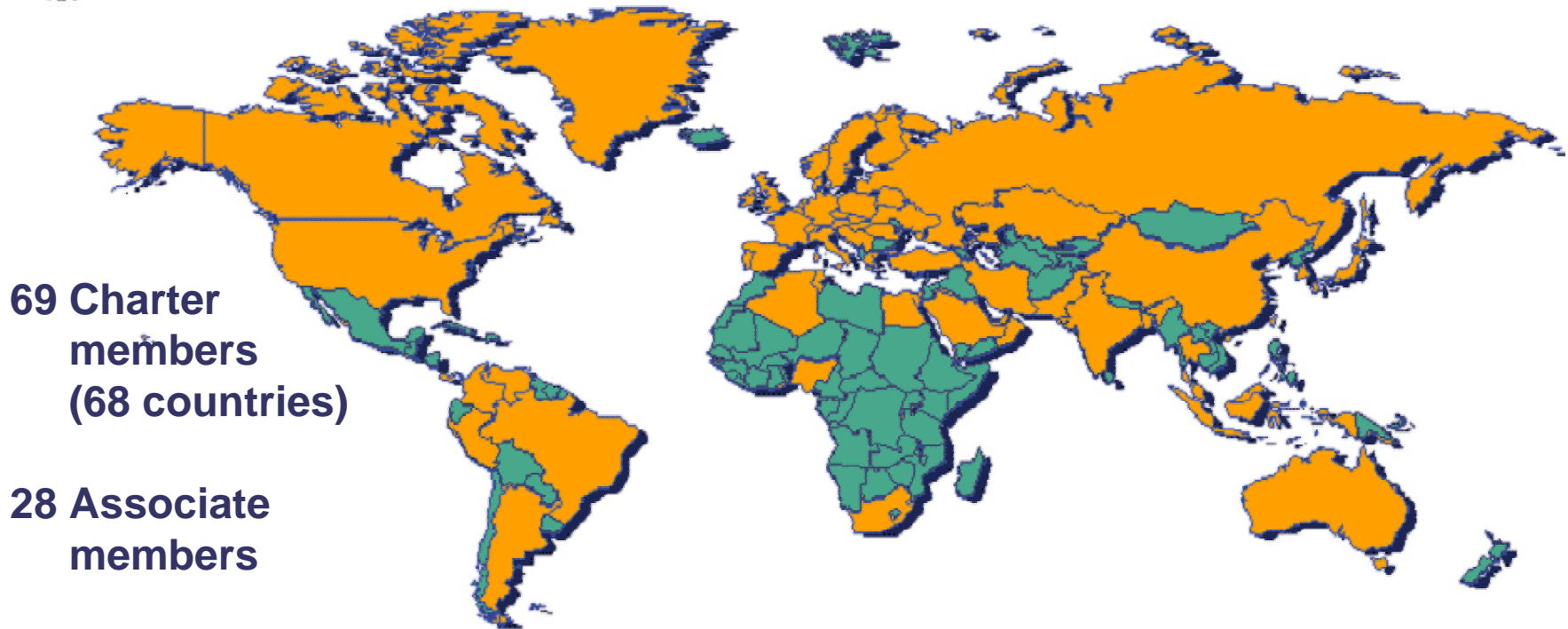


# IGU represents around 95% of all gas sales



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Members Non Members



69 Charter members (68 countries)

28 Associate members

Also gas companies can become member and benefit from IGU's vast networking possibilities





# IGU serves as a spokesman for the gas industry worldwide

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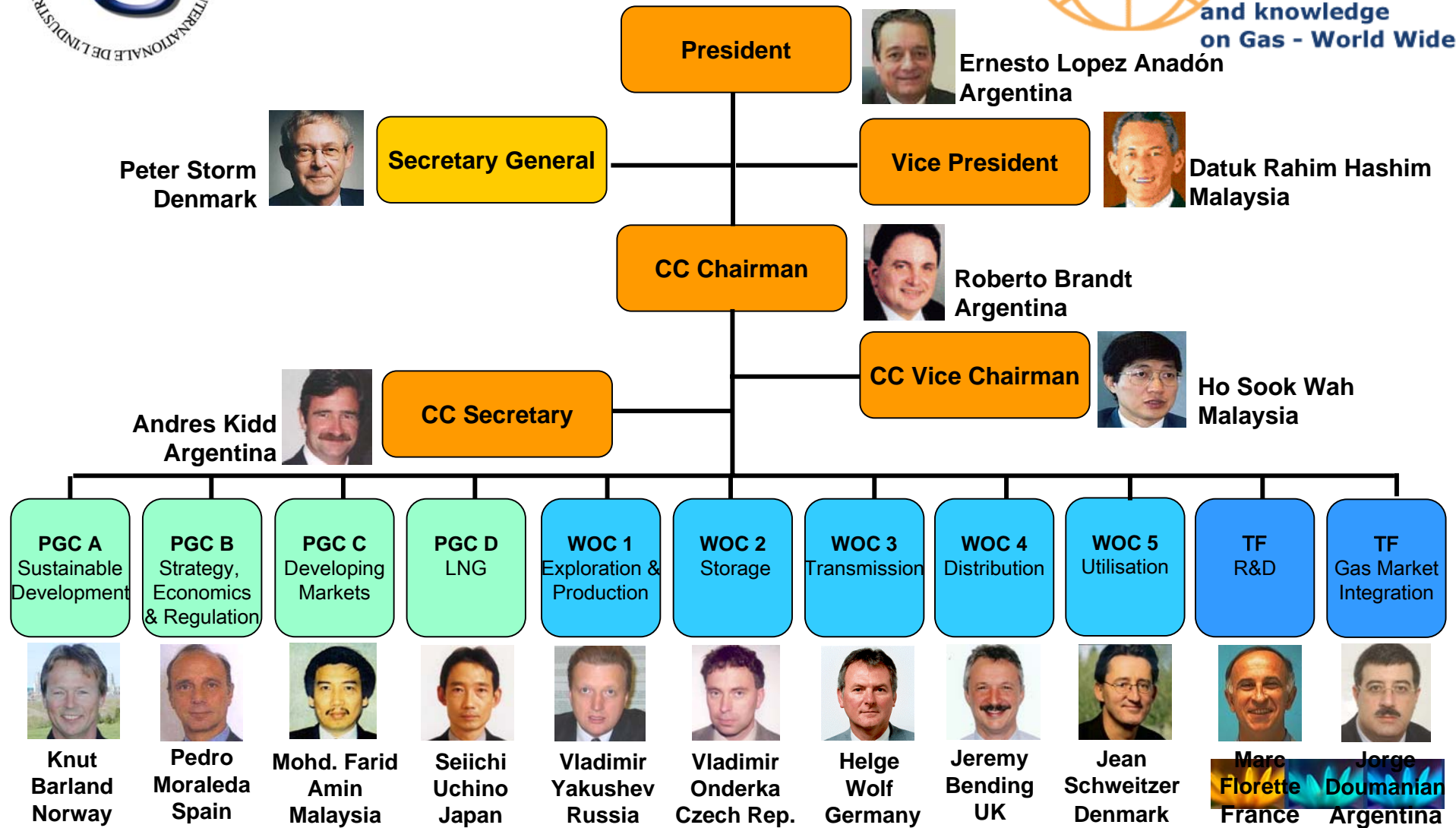


- Worldwide non-profit (75 years)
- Promotes technical and economic progress of the gas industry
  - e.g. The World Gas Conference every 3 years
- Organisations affiliated to IGU
  - Foundation IGRC
  - Gas Infrastructure (GIE)
  - GERG
  - IANGV / ENGVA
  - Marcogaz
  - Pipeline Research Council (PRCI)





# Experts from all over the world are represented in the technical team





## The information channels of IGU are top-class



- Organises conferences and supports information exchange among members

### **Organiser of**

- IGU Gas Research Conferences (IGRC)

### **Co-Sponsor of**

- LNG Conferences

- Liaison with UN, IEA and other international energy organisations





# IGU is the main Sponsor/Organizer of the LNG X Conferences



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LNG15 GNL15  
Barcelona 2007

**Barcelona**  
**24-27 April 2007**



[www.lng15.com](http://www.lng15.com)

**Further Sponsors/Organisers are Gas Technology Institute (GTI) of USA and International Institute of Refrigeration (IIR) in Paris**





# Agenda



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## The new triennium is under Argentine presidency (2006-09)



- **24<sup>th</sup> World Gas Conference** in October 2009, in Buenos Aires, Argentina
- **Theme**  
The global energy challenge: „Reviewing the strategies for natural gas“
- **Mission**  
Increase the value to the membership:
  1. promote the exchange of knowledge and information
  2. provide solid and concrete reference tools for decision makers

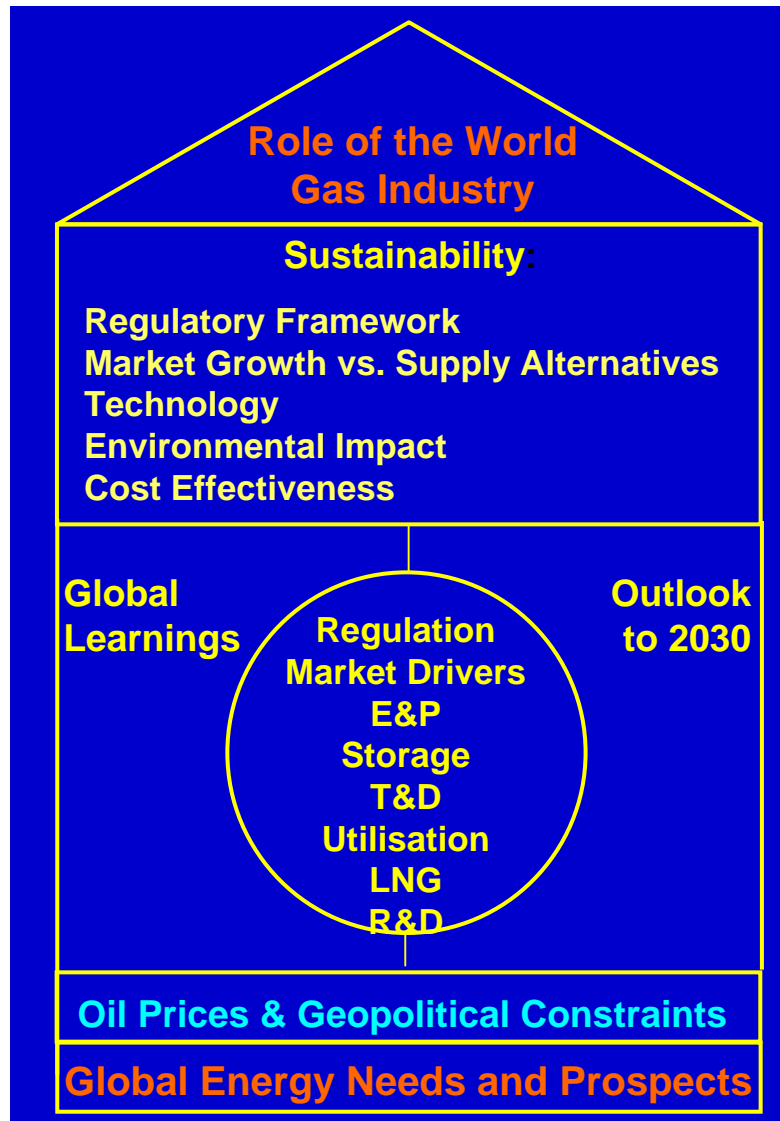




# The TWP is based on three strategic guidelines



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- 1. The Global Energy Challenge:**  
Reviewing the strategies for natural gas towards 2030

Develop a prospective analysis of the key drivers for the next 25 years





## The 2. guideline focuses on a technical and operational perspective



### 2. Contribution of the natural gas industry in terms of security of supply, safety and environment

Analyse short term intricacies of supply from a more technical and operational perspective along the entire supply chain





...the more integrated...the more competitive....



### 3. Regional gas market integration as a key driver for sustainable economic growth

Support a healthy investment and business climate and high-quality dialogue between governmental and corporate players





# Agenda

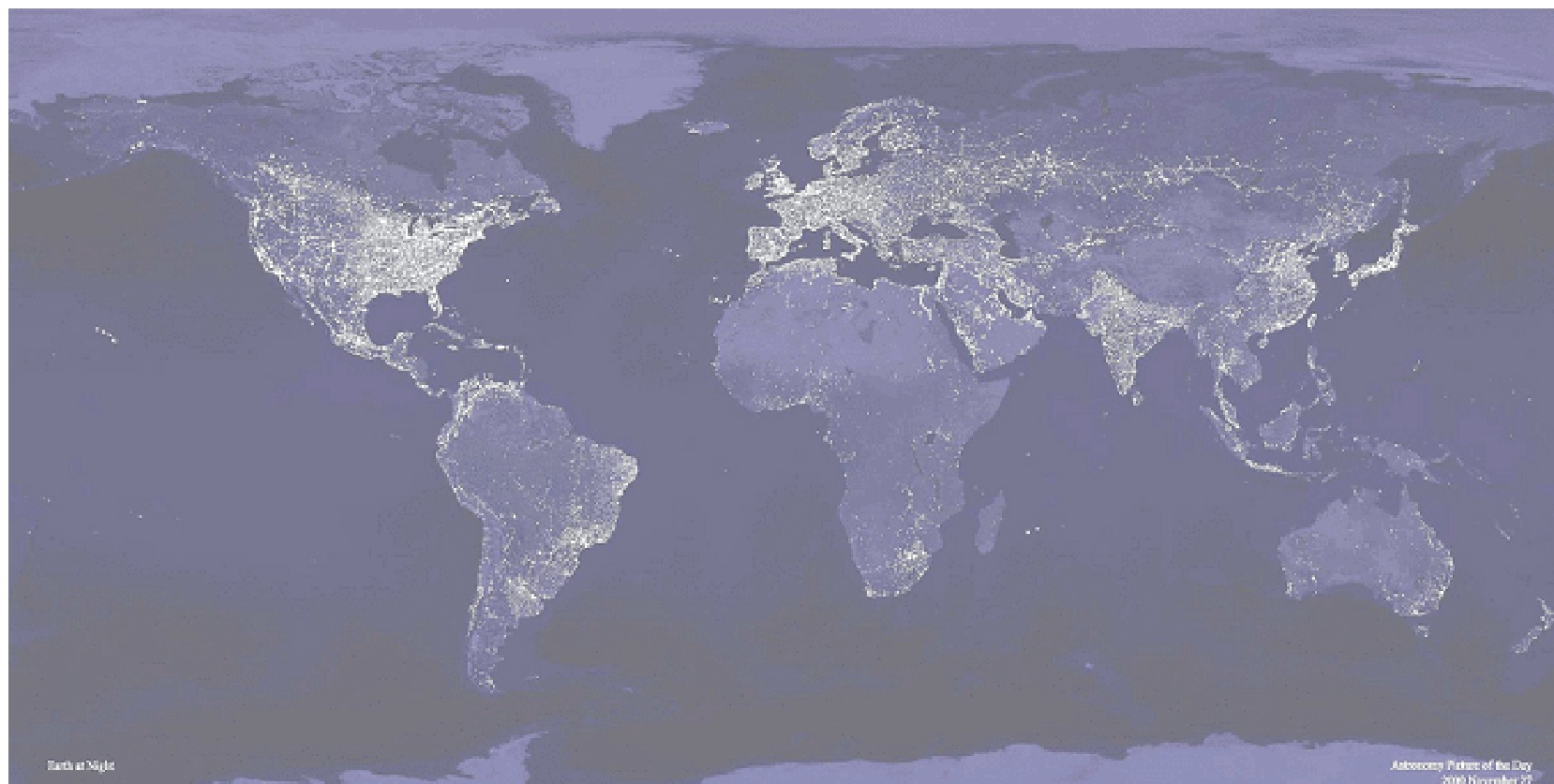


- About IGU
- The New Triennium (2006-09)
- **Some IGU Statements**





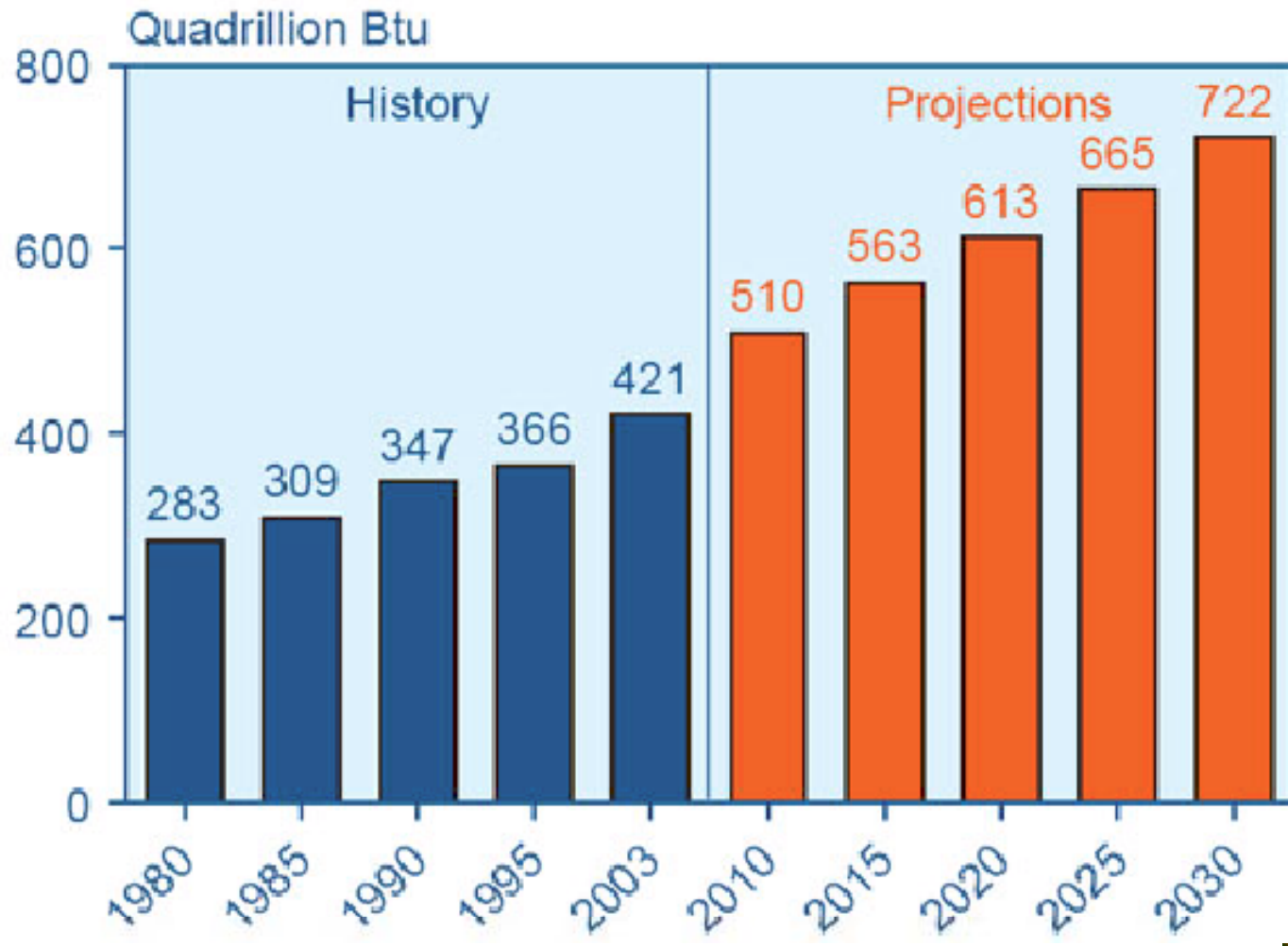
# Our planet by night shows where energy is used today







# EIA projects a strong growth for worldwide energy demand



Source: EIA (International Energy Outlook 2006)





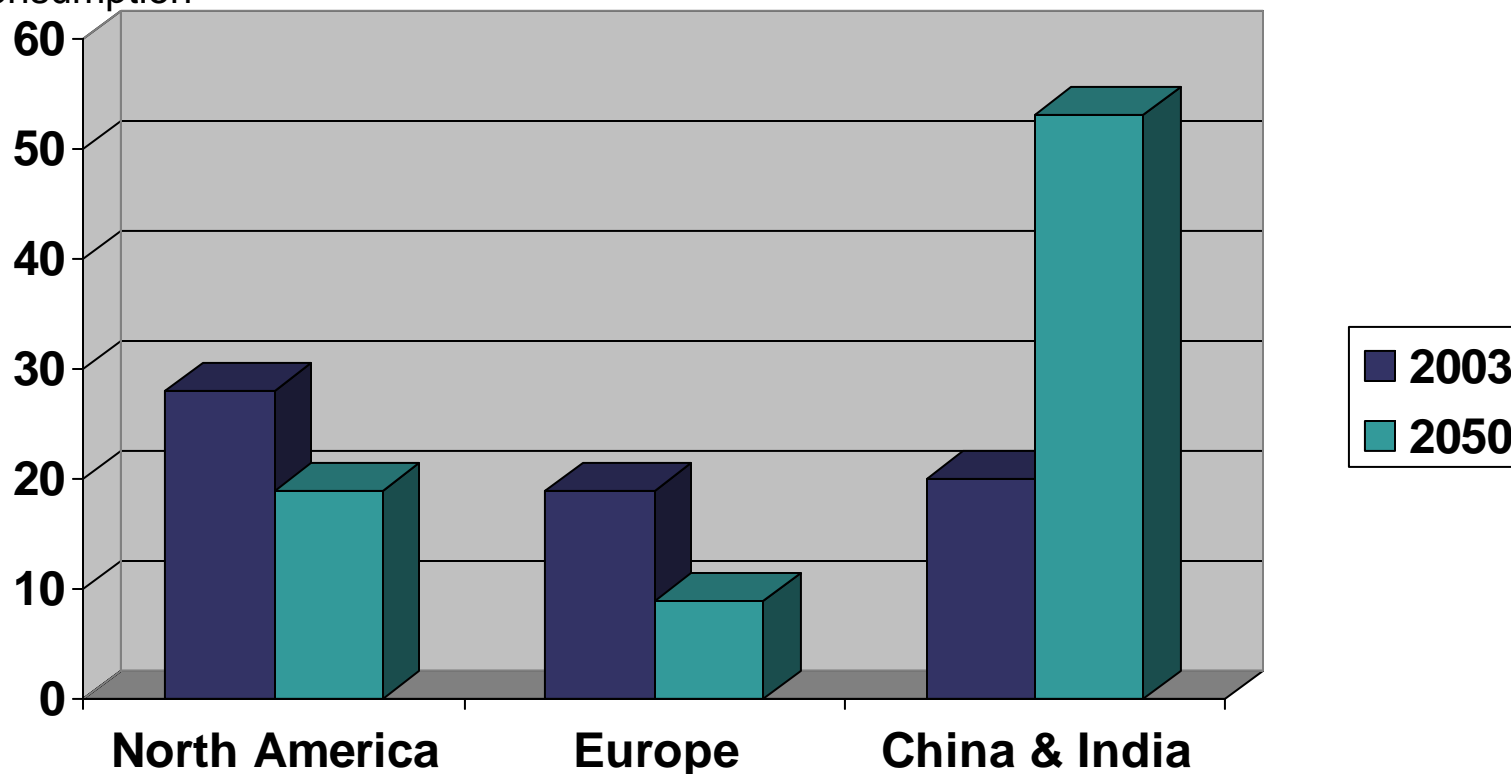


# China's & India's share in energy consumption will increase greatly



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% of world  
energy  
consumption



Data: EIA 2006, Data for 2050 extrapolated by average annual percentage change rate of 2003-2030



# In the past gas was expected to be abundant – now: sold out?!



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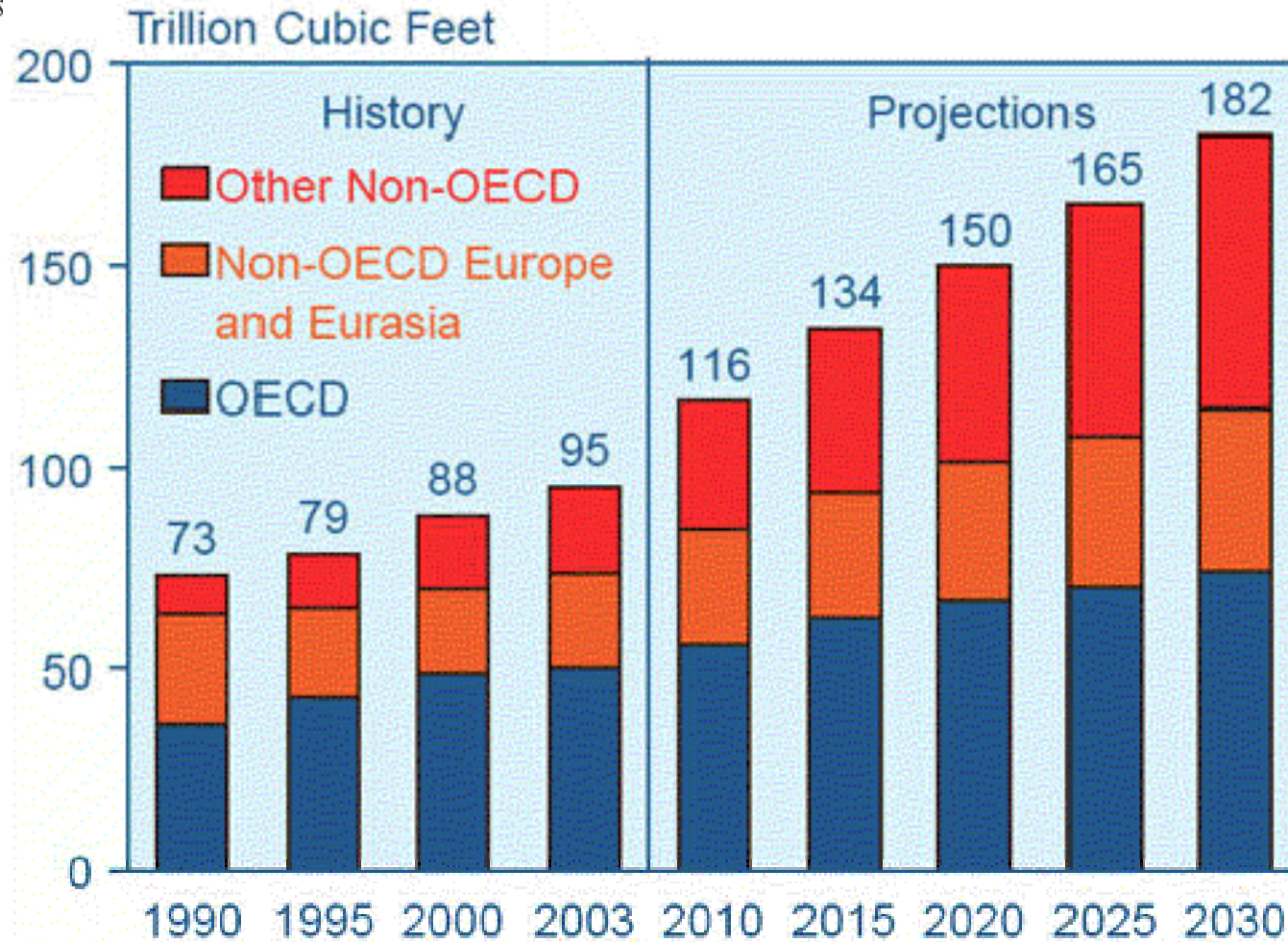




# EIA forecasts also strong demand for natural gas in the future



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Source: EIA (International Energy Outlook 2006)





# The forecasts done in the past were too cautious



Gas deliveries from - to	1997	2005/06
Russia to EU (bcm)	90	102*
Norway to EU (bcm)	55	77*
Algeria to EU (bcm)	50	38*
World total gas demand pot. (bcm) in 2030	4100	4700**
Total reserve base	190a of 1995 consumption	64a** of 2006 consumption



\*actuals: BP statistics 2006 (actuals 2005), \*\*IEA statistics 2006

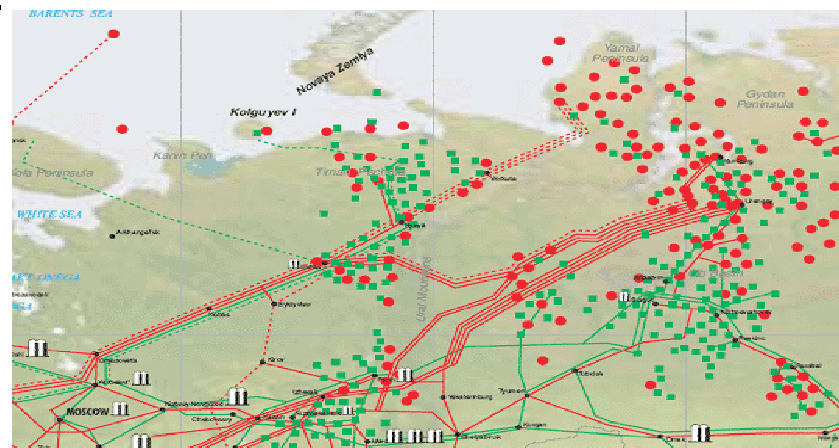
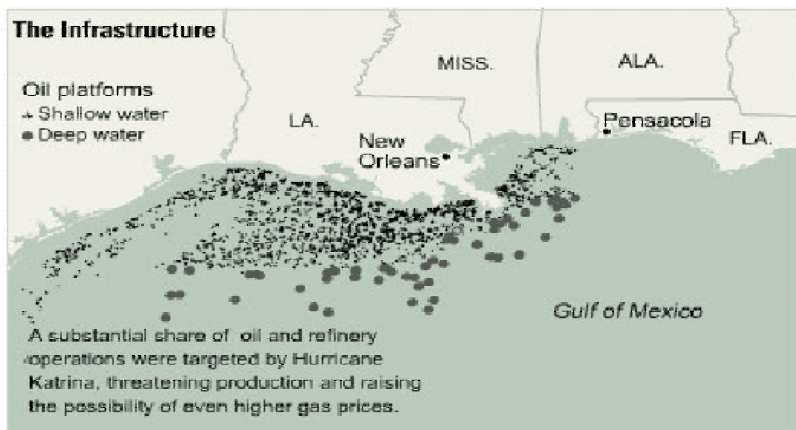




# Security of Supply is back!



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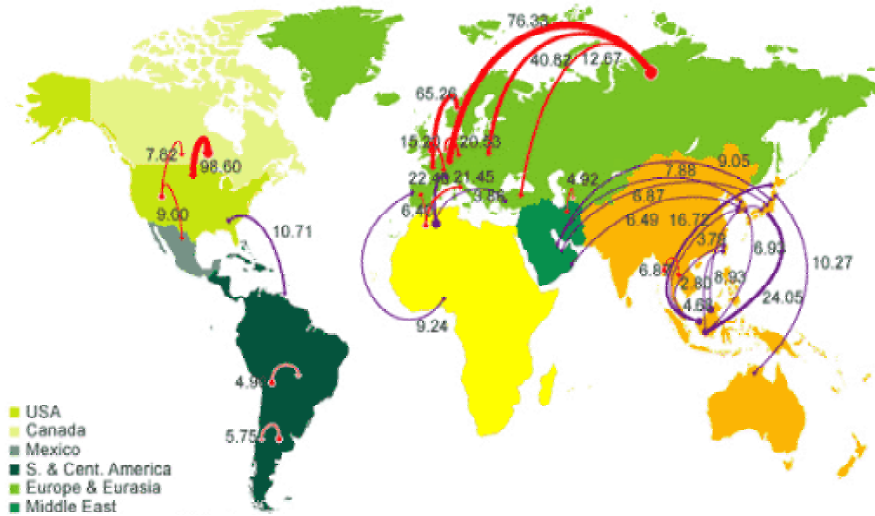


# A global LNG market needs a global commitment



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Trade flows worldwide (billion cubic metres)



## Yesterday

Regional  
markets for  
traditional  
natural gas



## Tomorrow

Global  
market for  
LNG



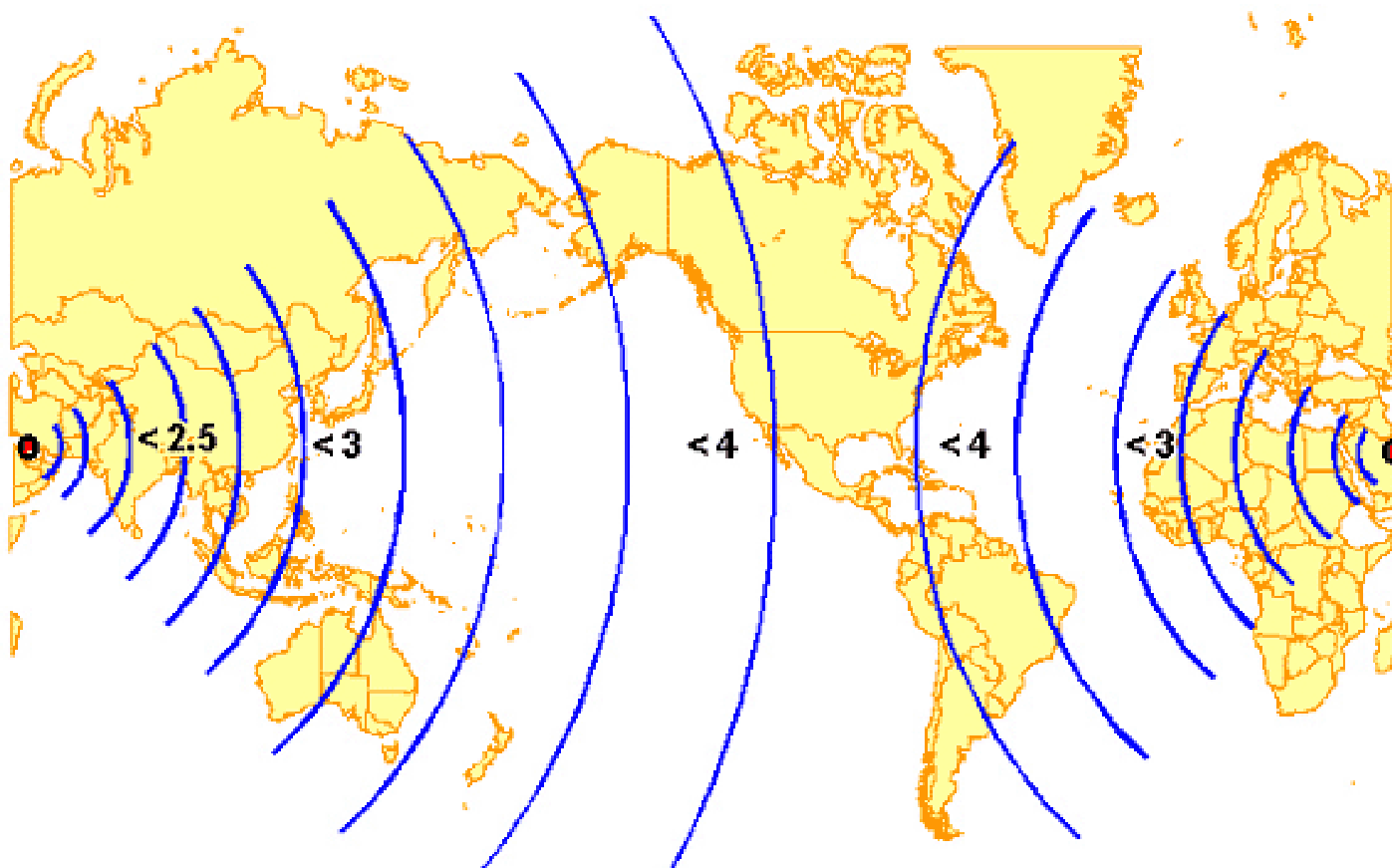


# Middle East LNG – Setting a new Global Cost Benchmark



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(USD perMMBtu)



Source: Cambridge Energy Research Associates,  
31001-10





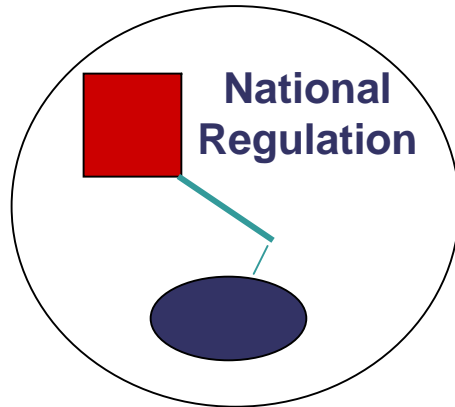


# Gas regulation was done along the lines of electricity regulation

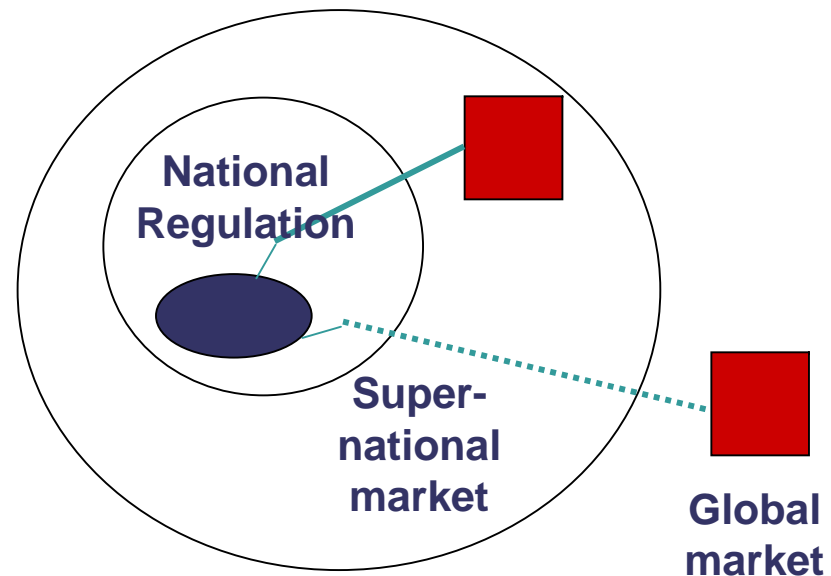


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## Electricity



## Gas



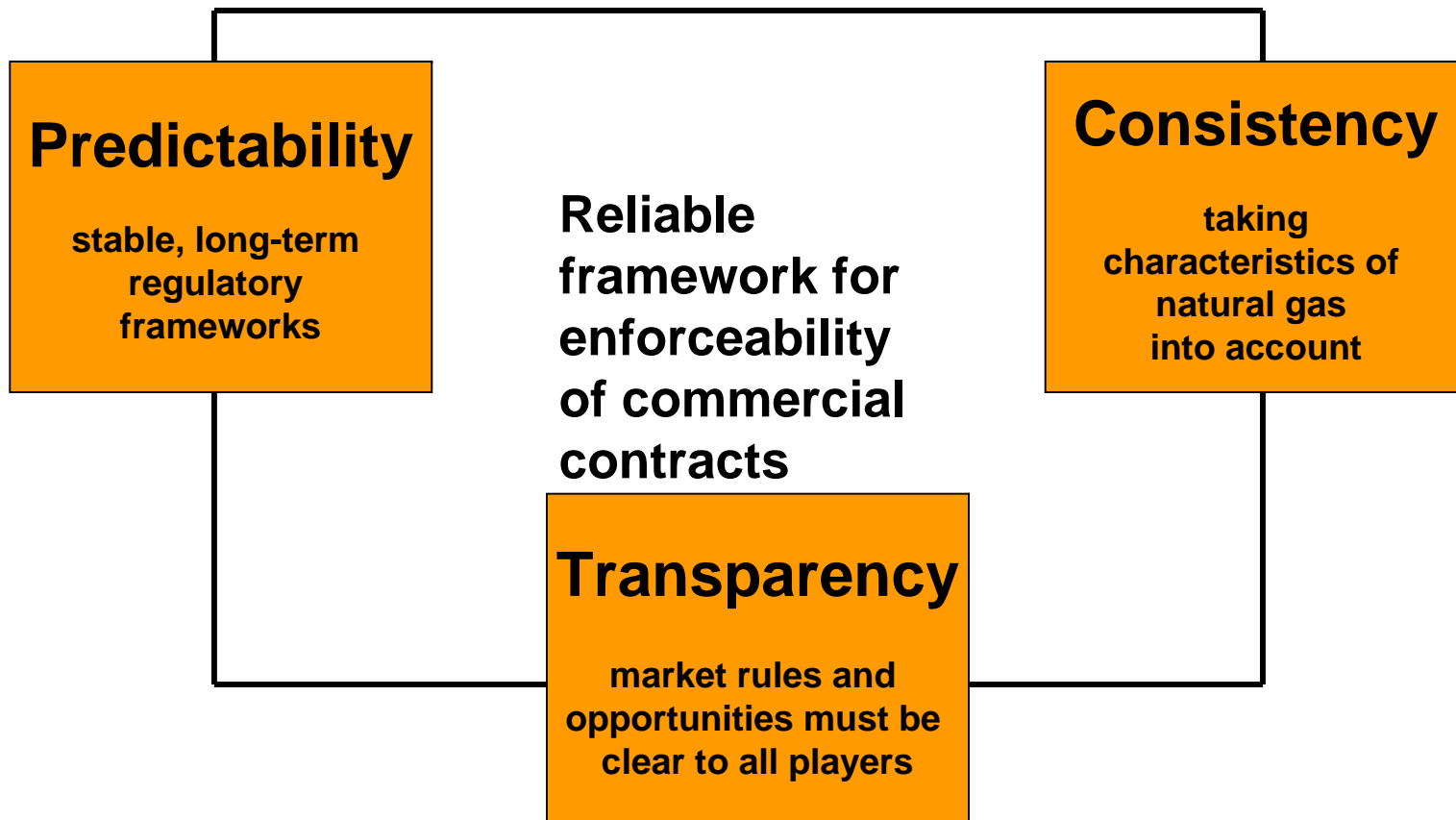
### Business levels

-  Production
-  Transmission
-  Distribution





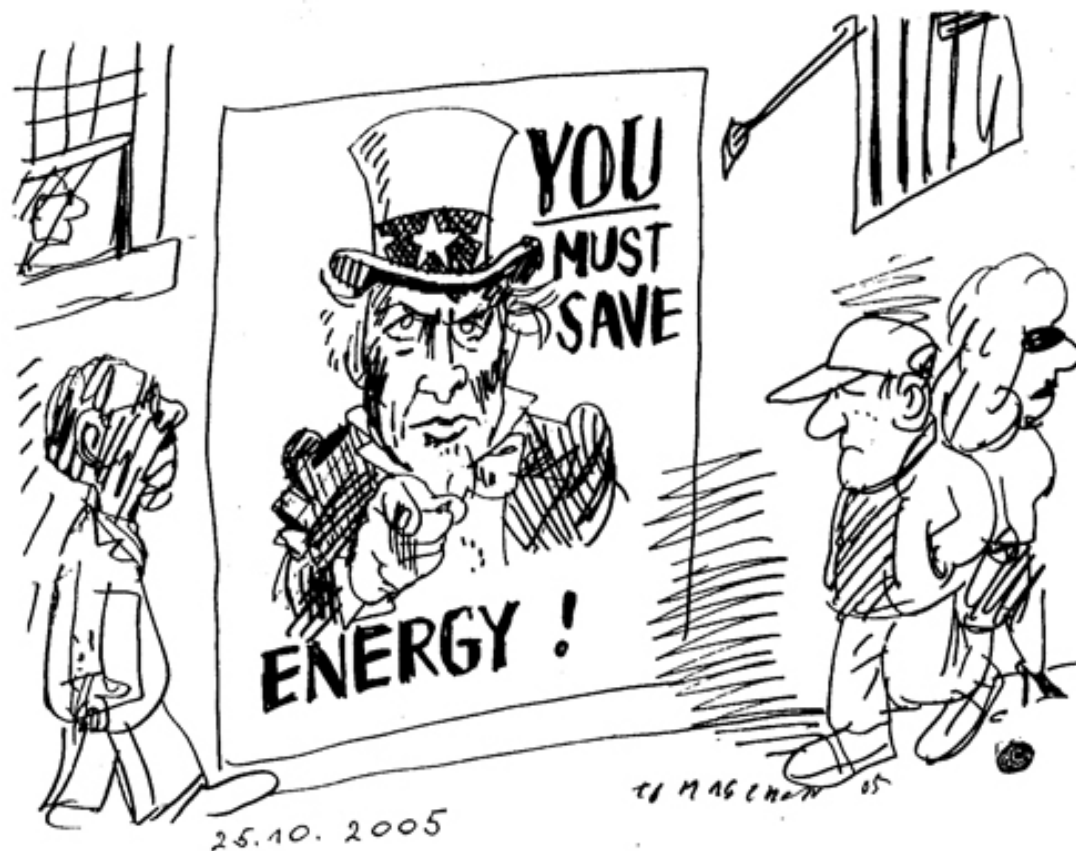
# Conditio sine qua non for a healthy gas business climate



# The magic word in the future should be „energy efficiency“



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## Conclusions



- **Strong demand for energy in the future (Prices ↑)**
- **Security of supply is back**
- **The Gas market is going global (Competition ↑ )**
- **Factor of success: Finding the appropriate regulatory system**
- **Sustainability above all**





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**Thank you  
for your attention!**

**See you in Buenos Aires!**

**24<sup>rd</sup> World Gas Conference  
and Exhibition**

**October 5 – 9 2009**

