



Economic Commission for Europe

**ENERGY SECURITY
FORUM**

**Committee on Sustainable Energy
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CONTENTS

- **Background**
- **Findings/conclusions**
 - Global emerging energy security risks
 - Caspian sea region
- **What next?**

ECE/ENERGY/2006/2; /3; /3/Add.1



ENERGY SECURITY FORUM

- **Launched in November 2003**
 - 3-year mandate
- **Outputs & products**
 - 2 High Level meetings, CD-ROMs & DVD
 - Experts' working meetings
 - Global study (to be published)
 - Report on Caspian Sea region
 - Findings transmitted by private sector members to host of 2006 G8



GLOBAL EMERGING ENERGY SECURITY RISKS



CONCLUSIONS: **HYDROCARBONS (1)**

- **Remain mainstay of energy supplies**
- **Resource depletion not a problem**
- **However, growing import dependency**
- **Concentration of reserves in few regions**
- **Restricted access**
- **Lack of adequate infrastructure**
- **Security risks along supply chain**



FINDINGS: HYDROCARBONS (2)

- **Key differences among countries on energy security, role of market & governments**
- **Strategic and foreign policy issue**
- **Interdependence**
- **Tensions on various levels**
- **Hence, strengthened dialogue necessary**
 - common understanding



CONCLUSIONS: **NON-HYDROCARBONS (1)**

- **Renewables: significant growth but not contribution (should promote!)**
- **Nuclear outlook: uncertain but improving**
- **Prospects for coal: dependent on clean coal technologies/zero emission technologies**
- **Gas fuel of choice today**
- **Infrastructure constraints**



ISSUES FOR DIALOGUE

- **Principles guiding energy relationships**
- **Information sharing and transparency**
- **Infrastructure investment & financing**
- **Regulatory and policy framework**
- **Standards & practices**
- **R & D and deployment of new technologies**
- **Transit & burden sharing**



CASPIAN SEA REGION COUNTRIES



BACKGROUND

- **High level meeting on Caspian region in 2005**
 - **Conjunction with Committee Session**
- **Joint statement of Azerbaijan, IR of Iran, Kazakhstan, Russian Federation & Turkey**
- **Seminar in April 2006**
- **Report with recommendations**



CONCLUSIONS

- **Increased hydrocarbon prod. and exports (from 2% to 3% of total world production)**
- **Existing & planned transport capacity; adequate if implemented**
- **Need to bypass Turkish Straits**
- **Russian Federation & IR Iran have other options**
- **Legal framework for Caspian sea desirable**
- **Political differences hamper cooperation**



RECOMMENDATIONS

- **Cooperation/analysis on geological and environmental conditions**
- **Conclude territorial legal framework**
- **Transparent legal regulations for investments**
- **Post hydrocarbon economic development**
- **Strengthen international cooperation**



WHAT NEXT?

PROGRAMME OF WORK

- **Periodic agenda item for Committee?**
- **Separate intergovernmental body?**
- **Agenda item for Committee, but with Symposium in 2007 to better define options?**
 - **Level**
 - **Format**
 - **Content**



OVERALL CONCLUDING

REMARKS

- **Interdependence**
- **Accelerate energy efficiency improvements**
- **Diversification**
- **Flexibility**
- **R&D, technology deployment**
- **Strengthen international relations, economic cooperation and rule of law**
- **Multilateral Energy Dialogues**
 - **Including at UNECE**

