

Natural gas markets

Key issues & trends – round table

Gas – part of a sustainable energy future

Carolin Oebel
Director

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The global energy future

Impacting the global framework:

- Rising population – from ca. 7 to 9 billion in 2050
- Human strive for a better life
- Technological progress
- Air quality & climate change concerns



The world needs:

- More energy
- Cleaner energy
- Safe energy
- Affordable energy

European
focus



Natural gas can form the link in a sustainable future energy system

- Abundant
- Cleanest fossil fuel
- Can help improve local air quality
- Flexible & ideal partner for renewables
- Wide range of usage options



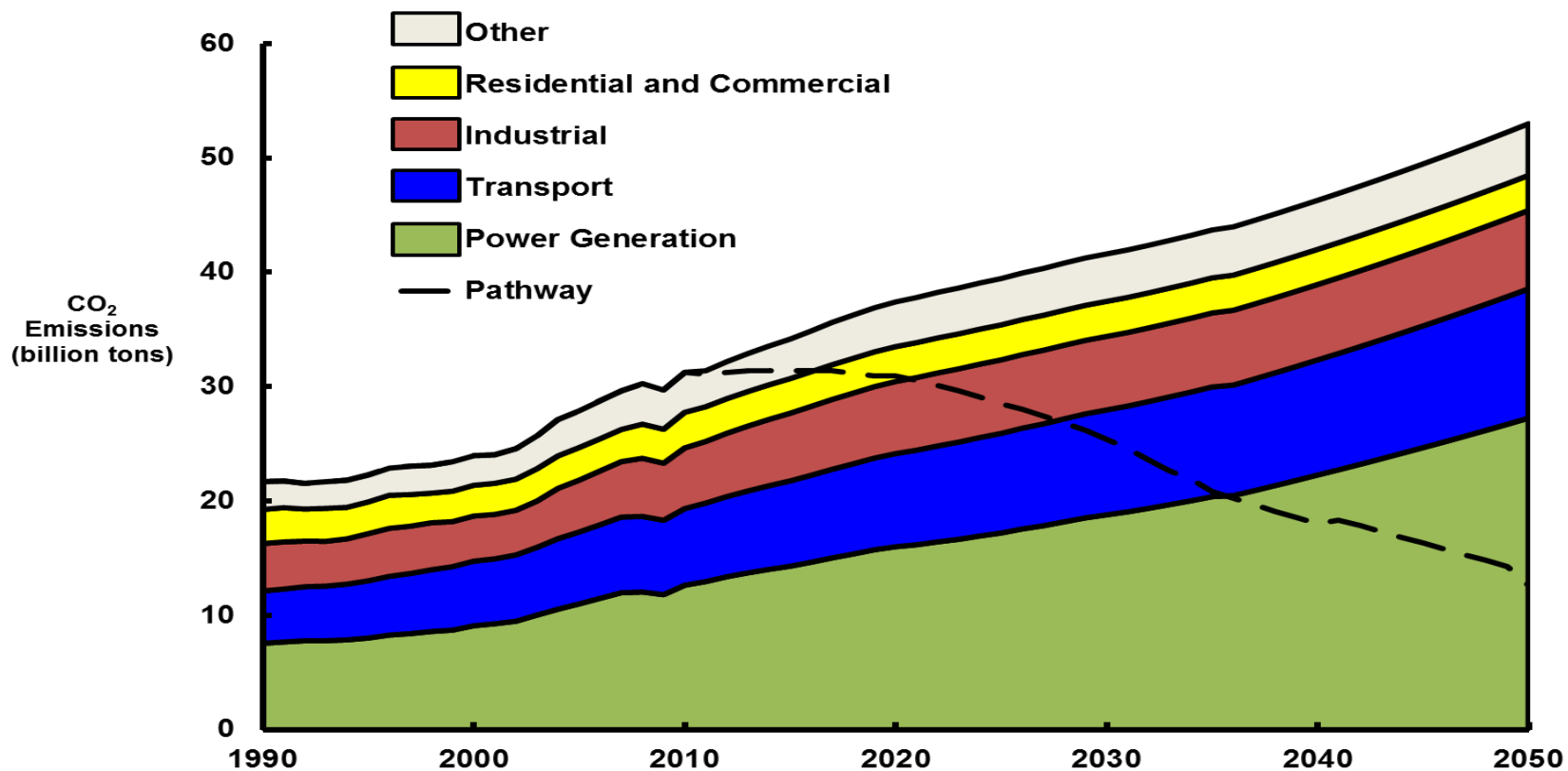
➔ **Investment in gas infrastructure does not predetermine future energy landscape**

➔ **Adaptability of natural gas is key advantage to allow for integration of new & innovative technologies!**

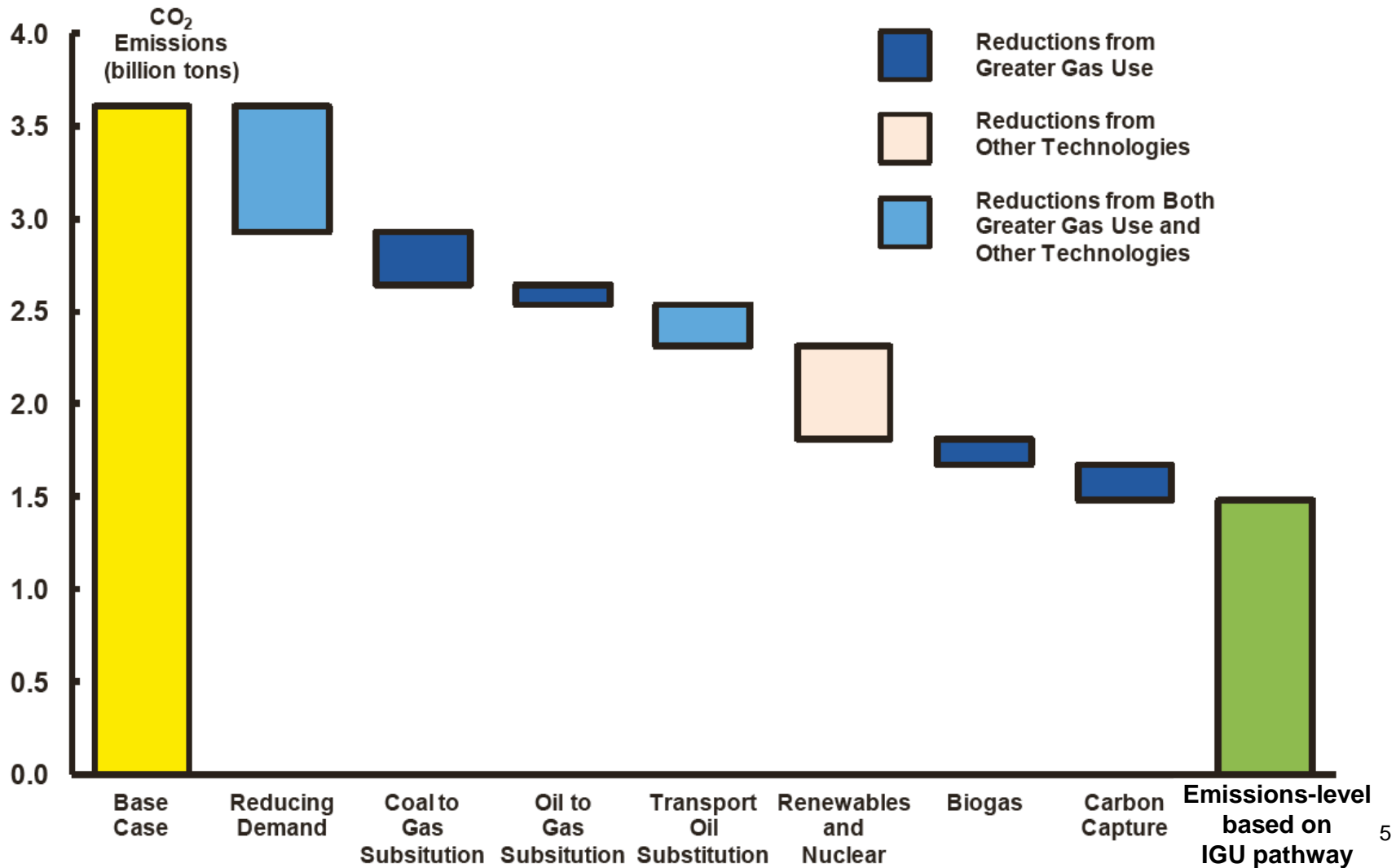
The Pathway towards a sustainable future

Meeting future global energy needs – whilst addressing air quality and climate change concerns

Global Emissions Trajectory Base Case



Also in Europe, the most energy-efficient of regions: still potential for CO₂-reductions



Requirements to realise a sustainable energy future

All

- Reduce demand
- Increase energy efficiency
- Realise synergies of integrated energy concepts

Industry

- Continuously improve technology
- Establish trust with all stakeholders

Politics

- Ensure a stable policy & regulatory framework
- Support low-carbon energy
- Support innovation – without predetermining future technologies
- Act quickly