

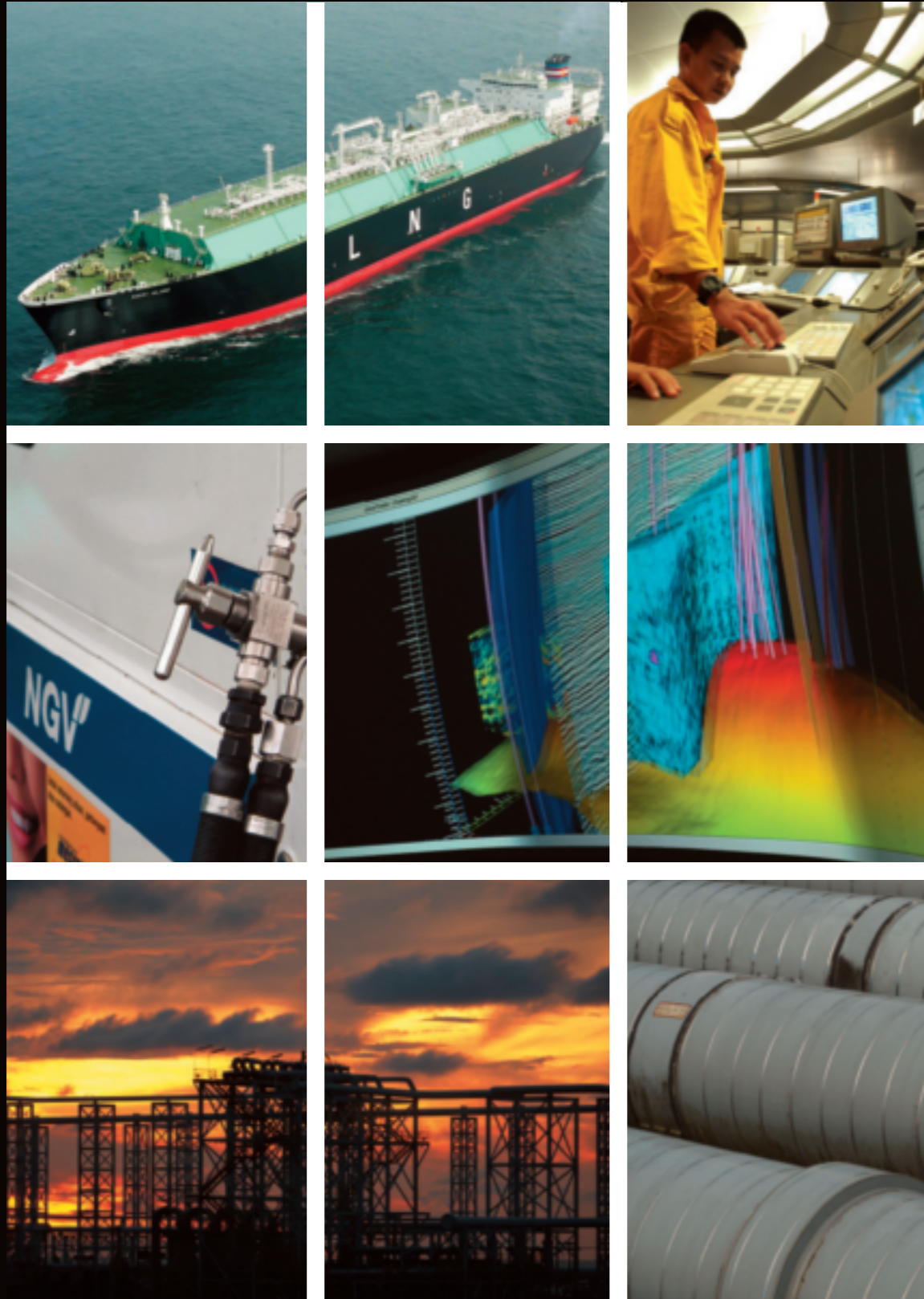
International Gas APRIL 2007
INTERNATIONAL GAS UNION

International Gas APRIL 2007

THE GLOBAL
ENERGY
CHALLENGE

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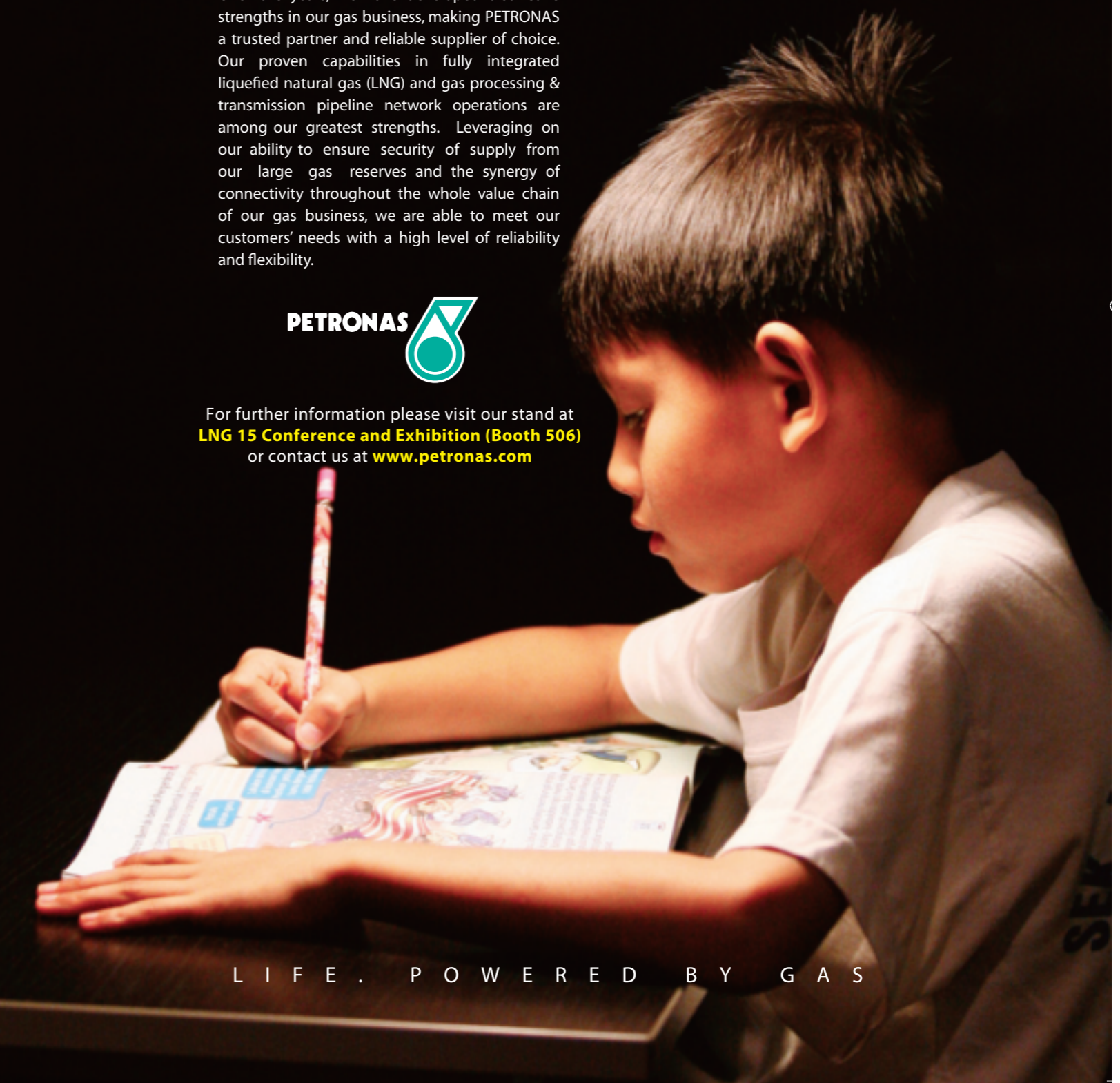


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International Gas APRIL 2007

The IGU Magazine

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Vision, Mission and Objectives

The International Gas Union (IGU) is a worldwide, non-profit organisation promoting the progress of the gas industry. Through its many member countries representing approximately 95% of global gas sales, IGU covers all aspects of the natural gas industry.

● The Vision

Recognising that natural gas has an important part to play in satisfying the global need for an environment-friendly energy source, IGU will be the most influential, effective and independent non-profit organisation, while serving as the spokesman for the gas industry worldwide.

● The Mission

IGU will actively, directly and through its members, promote the technical and economic progress of the global gas industry.

IGU will work towards improving the competitiveness of gas in the world energy markets. By promoting the development and application of new technologies and best practices, IGU will help optimise the economics of the entire gas chain, while emphasising sound environmental performance, safety and reliability.

IGU – serving as a global information clearing house – will promote transfer of technology and know-how.

In carrying out this mission, IGU will maximise value to its members and gas customers.

● Objectives

In striving towards the vision and fulfilling the mission, IGU will regarding:

ECONOMY: Promote all activities within the entire gas chain, which can add to the technical and economic progress of gas;

CUSTOMERS: Encourage development of good customer services and customer relations;

TECHNOLOGY: Encourage research and development towards new and better technologies for the gas community;

SAFETY: Promote the safe production, transmission, distribution and utilisation of gas;

ENVIRONMENT: Encourage and promote development of clean technology, renewable energy applications and other activities, which will add to the environmental benefits of gas;

INTERNATIONAL GAS TRADE: Encourage international trade in gas by supporting non-discriminatory policies and sound contracting principles and practices;

LEGAL: Promote and contribute to the development of legislation concerning:

- the establishment of equitable, non-discriminatory and reasonable environmental and energy efficiency regulations, and
- efforts to establish appropriate and relevant international standards, as well as
- the promotion of and participation in the exchange of information relating to regulatory processes;

COOPERATION: Enhance partnership with industry and manufacturers, and cooperation with governments, policy makers and international energy related organisations, and promote the exchange of information among members in order to help them in improving the efficiency and safety of gas operations.

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Partnerships that also allow us to develop innovative contracts to access multiple markets and respond to customer needs.

Today, we are the second largest supplier of gas to liquefaction plants and participate in five major LNG production centres, including the new Tangguh facility under construction in Indonesia. We also have access to multiple markets – in Japan; South Korea; the UK, the US and, most recently, China where we are the only international company to participate in the country's first LNG import and re-gasification project, at Guangdong.

It's what, we believe, makes BP a natural gas partner in the rapidly changing world of LNG.



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The opinions and views expressed by the authors in this magazine are not necessarily those of IGU, its members or the publisher. While every care has been taken in the preparation of this magazine, they are not responsible for the authors' opinions or for any inaccuracies in the articles.

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Message from the President

Dear Colleagues

The 2006-2009 Triennium is well under way and the reaction from the IGU membership has filled us with a deep sense of satisfaction, coupled with a new boost of confidence that this term will prove to be a highly productive one, as a result of your unwavering support.

Indeed, we have received a record amount of nominees for the Study Groups from both Charter and Associate Members, registering well above 600 professionals before the end of 2006. Furthermore, the trend at the start of 2007 hints that we should expect the final number to be even higher.

The Working and Programme Committees and Task Forces have held their first meetings, registering a strong commitment of their members. They have also initiated the projects defined in the 2006-2009 Triennial Work Programme, which was formally approved during the very successful Council meeting held in Lima, in October last year. You will find in this issue of *International Gas* the first Progress Report from the team leaders of our technical programme.

Our confidence is further sustained by the fact that IGU is not alone in supporting the world gas industry as one of the foundations for energy needs in the future. In fact, and following on from GIIGNL's 2006 General Assembly held last October in Boston where I represented IGU, this magazine is being published on the eve of the LNG-15 conference to be held in Barcelona, an event sponsored by the Union, following a long history of mutual cooperation. To mark LNG-15 we are running a feature giving a brief overview of the growing LNG business as an introduction to some of the issues which will be discussed during the conference.

Remaining on the topic of gas transportation, transmission pipeline systems are also addressed in this issue, both from an overall perspective on gas pipeline developments serving the European

market, as well as on the specific issue of third party interference, a very relevant topic which we have chosen to work on during this Triennium at both the distribution and transmission levels. An article from the US-based Pipeline Research Council International (PRCI), which is affiliated to IGU, provides a fitting introduction to these topics.

You will find further valuable contributions from the USA in this magazine. The editor's article on the relationship between IGU and the American Gas Association (AGA) aptly describes the constructive spirit in which our meeting was conducted last October in Washington DC, during the 3rd World Forum on Energy Regulation. The renewed US support in this Triennium is a clear example of the revitalised relationship with AGA, which sent an observer to the founding meeting of our Union in 1931 and became a Charter Member shortly afterwards.

This spirit of cooperation has also extended to organisations outside IGU. At the end of November last year we held a very productive meeting in Paris with the International Energy Agency (IEA), where several topics of joint collaboration were identified including energy efficiency, the dialogue between gas producers and consumers, and response to energy emergencies and disruptions. Mutual support was also agreed on the future deliverables from both organisations, such as IEA's *Natural Gas Market Review* and IGU's *2030 Natural Gas Industry Outlook* study. Further information on these developments will be given in future issues of this magazine.

We knew we had set an ambitious target for this Triennium when deciding on our theme, *The Global Energy Challenge: Reviewing the Strategies for Natural Gas*. However our Union has once again stood up resolutely to the challenge, which bestows on us both an honour and an increasing responsibility, reinforcing our resolve to ensure a Triennium that aims to deliver substantial and valuable results for its members.

Ernesto López Anadón



Ernesto López Anadón, President.



Message from the Secretary General

Dear Reader

● Towards a global gas market

Time is flying and it does not seem long since we were all enjoying the successful 23rd World Gas Conference in Amsterdam, which also marked the end of a very successful Dutch Presidency.

The torch has now been passed to the Argentine Presidency and IGU's work moves forward with fresh vigour under its first Latin American leadership. As the President points out in his message, we have had an excellent start to the Triennium and a range of activities have been initiated. When you read this, the Presidency will have launched the very important and ambitious special study for a *2030 Natural Gas Industry Outlook* in line with the Strategic Guidelines.

Here in the IGU Secretariat our workload has been increasing with the expansion of the Union, and we have a new staff member. Our Associate Member, RWE Transportnetz Gas GmbH of Germany, has seconded Barbara Anette Schmid to the Secretariat where she works as my Assistant alongside Lotta Hållén-Kragh, which will give us the opportunity to develop our membership services even further. You can find more about my two Assistants in the news pages "From the IGU Secretariat".

As usual we feature a number of articles from our standing IGU Committees and third parties, in addition to the bi-annual Progress Report. A strong theme running through this issue is the need to encourage R&D in all sectors of our industry. With this in mind we look at preparations for the IGU Research Conference (IGRC), which will take place next year in Paris. We also look at the burgeoning GTL sector in Qatar, while, in our closing article, Larry T. Ingels



Peter K. Storm, Secretary General.

shares some memories of his dedicated service to the Union.

Meanwhile, the LNG-15 Conference and Exhibition is taking place in Barcelona this month, one of the main global gas events in the first half of 2007. The LNG Conferences are getting close to the World Gas Conferences in size, reflecting the fact that LNG is increasing its market share and gradually creating a true global gas market for the first time.

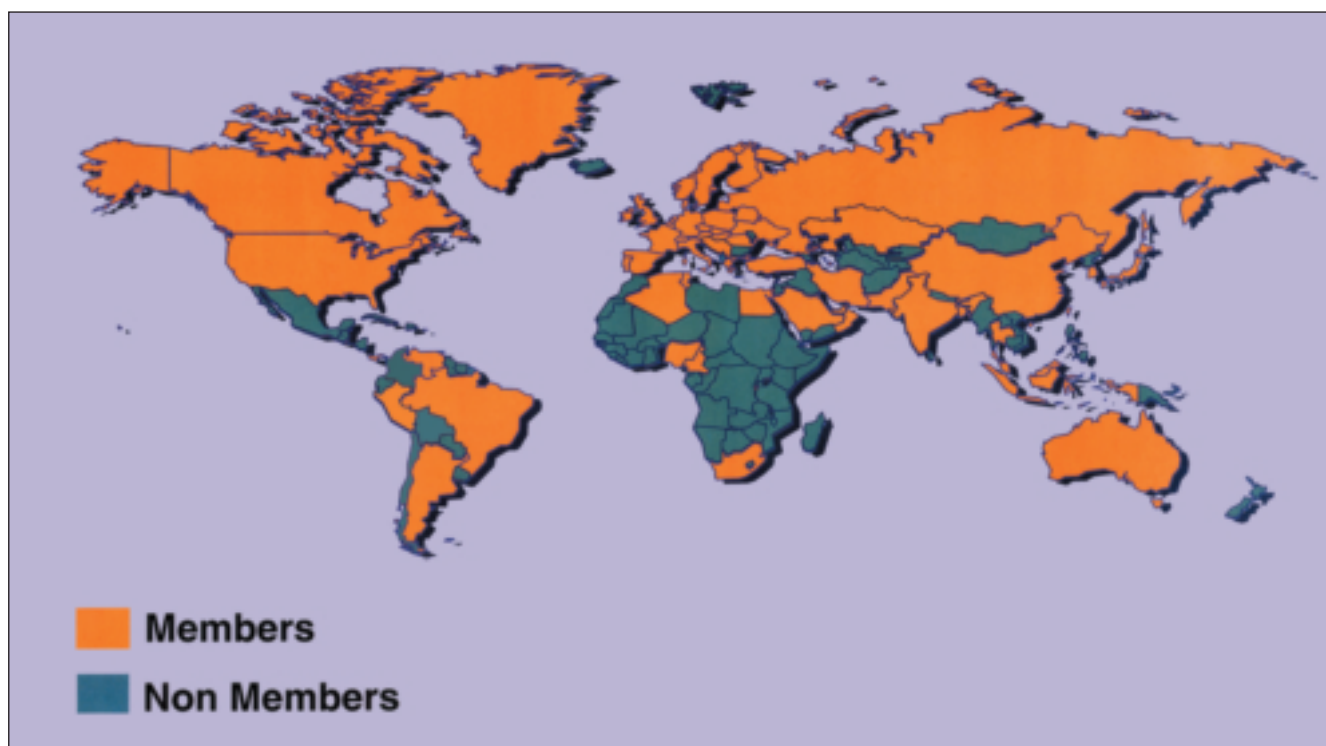
Enjoy your reading.

Peter K. Storm



Countries Represented in IGU April 2007

Algeria	Estonia	Lithuania	Slovak Republic
Argentina	Finland	Malaysia	Slovenia
Australia	France	Monaco	South Africa
Austria	Germany	Netherlands, The	Spain
Bangladesh	Greece	Nigeria	Sweden
Belarus, Republic of	Hong Kong, China	Norway	Switzerland
Belgium	Hungary	Oman, Sultanate of	Taiwan, China
Bosnia and Herzegovina	India	Pakistan	Thailand
Brazil	Indonesia	Peru	Trinidad and Tobago
Brunei	Iran	Poland	Tunisia
Cameroon	Ireland	Portugal	Turkey
Canada	Israel	Qatar	Ukraine
China, People's Republic of	Italy	Romania	United Arab Emirates
Croatia	Japan	Russia, Federation of	United Kingdom
Czech Republic	Kazakhstan	Saudi Arabia	United States of America
Denmark	Korea, Republic of	Serbia	Venezuela
Egypt	Latvia	Singapore	





CHARTER MEMBERS

<i>Algeria</i> Association Algérienne de l'Industrie du Gaz – AIG	<i>Czech Republic</i> Czech Gas Association	<i>Italy</i> Comitato Italiano Gas (CIG)
<i>Argentina</i> Instituto Argentino del Petróleo y del Gas	<i>Denmark</i> Dansk Gas Forening – Danish Gas Association	<i>Japan</i> The Japan Gas Association
<i>Australia</i> Australian Gas Industry Trust c/o Energy Networks Association	<i>Egypt</i> Egyptian Gas Association	<i>Kazakhstan</i> KazTransGas
<i>Austria</i> Österreichische Vereinigung für das Gas- und Wasserfach (ÖVGW)	<i>Estonia</i> Estonian Gas Association	<i>Korea, Republic of</i> Korea Gas Union
<i>Bangladesh</i> Petrobangla (Bangladesh Oil, Gas & Mineral Corporation)	<i>Eurogas</i>	<i>Latvia</i> JSC Latvijas Gāze
<i>Belarus, Republic of</i> Beltransgas	<i>Finland</i> The Finnish Natural Gas Association	<i>Lithuania</i> Lithuanian Gas Association
<i>Belgium</i> Association Royale des Gaziers Belges	<i>France</i> Association Française du Gaz (AFG)	<i>Malaysia</i> Malaysian Gas Association c/o Petronas
<i>Bosnia and Herzegovina</i> Gas Association of Bosnia and Herzegovina	<i>Germany</i> Deutsche Vereinigung des Gas- und Wasserfaches e.V. (DVGW)	<i>Monaco</i> Société Monégasque de l'Électricité et du Gaz (SMEG)
<i>Brazil</i> Associação Brasileira das Empresas Distribuidoras de Gás Canalizado (ABEGAS)	<i>Greece</i> Public Gas Corporation of Greece (DEPA) S.A.	<i>Netherlands, The</i> Koninklijke Vereniging van Gasfabrikanten in Nederland (KVGN)
<i>Brunei</i> Brunei Energy Association	<i>Hong Kong, China</i> The Hong Kong & China Gas Co. Ltd	<i>Nigeria</i> Nigerian Gas Association c/o Nigeria LNG Ltd
<i>Cameroon</i> Société Nationale des Hydrocarbures	<i>Hungary</i> Association of Gas Distribution Companies	<i>Norway</i> Norwegian Petroleum Society (NPF) – Norwegian Gas Association
<i>Canada</i> Canadian Gas Association	<i>India</i> Gas Authority of India Ltd (GAIL)	<i>Oman, Sultanate of</i> Oman LNG L.L.C.
<i>China, People's Republic of</i> China City Gas Society	<i>Indonesia</i> Indonesian Gas Association (IGA)	<i>Pakistan</i> Petroleum Institute of Pakistan
<i>Croatia</i> Croatian Gas Association c/o INA-Naftaplin	<i>Iran</i> National Iranian Gas Company (NIGC)	<i>Peru</i> Perúpetro S.A.
	<i>Ireland</i> Irish Gas Association – Bord Gais Eireann	<i>Poland</i> Polskie Zrzeszenie Inżynierów i Techników Sanitarnych (PZITS) – Polish Gas Association
	<i>Israel</i> The Israel Institute of Petroleum & Energy	<i>Portugal</i> GDP – Gás de Portugal, SGPS, S.A.



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<i>Russia, Federation of</i> JSC Gazprom	<i>Sweden</i> Svenska Gasföreningen – Swedish Gas Association	<i>Turkey</i> BOTAŞ
<i>Saudi Arabia</i> Saudi Aramco	<i>Switzerland</i> Schweizerische Aktiengesellschaft für Erdgas (SWISSGAS)	<i>Ukraine</i> Naftogaz of Ukraine NJSC
<i>Serbia</i> Gas Association of Serbia	<i>Taiwan, China</i> The Gas Association of the Republic of China, Taipei	<i>United Arab Emirates</i> Abu Dhabi Liquefaction Company Ltd (ADGAS)
<i>Singapore</i> Power Gas Ltd	<i>Thailand</i> PTT Public Company Ltd – Petroleum Authority of Thailand	<i>United Kingdom</i> The Institution of Gas Engineers and Managers
<i>Slovak Republic</i> Slovak Gas & Oil Association	<i>Trinidad and Tobago</i> The National Gas Company of Trinidad and Tobago Ltd	<i>United States of America</i> American Gas Association
<i>Slovenia</i> Geoplin		<i>Venezuela</i> Petróleos de Venezuela S.A. (PDVSA)

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Bursagaz (Turkey)	NV NUON Asset Management (The Netherlands)
Cheniere Energy Inc. (USA)	PetroChina (People's Republic of China)
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E.ON Ruhrgas AG (Germany)	Shell Gas & Power International B.V. (The Netherlands)
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Gaz de France (France)	Société Suisse de l'Industrie du Gaz et des Eaux – SSIGE/SGW (Switzerland)
IGDAŞ – Istanbul Gas Distribution Co. (Turkey)	Suez S.A. (Belgium)
Indian Oil Corporation Ltd (India)	TBG – Transportadora Brasileira Gasoduto Bolívia-Brasil S/A (Brazil)
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Naturgas Fyn A/S (Denmark)	Union of Independent Gas Producers (Russia)

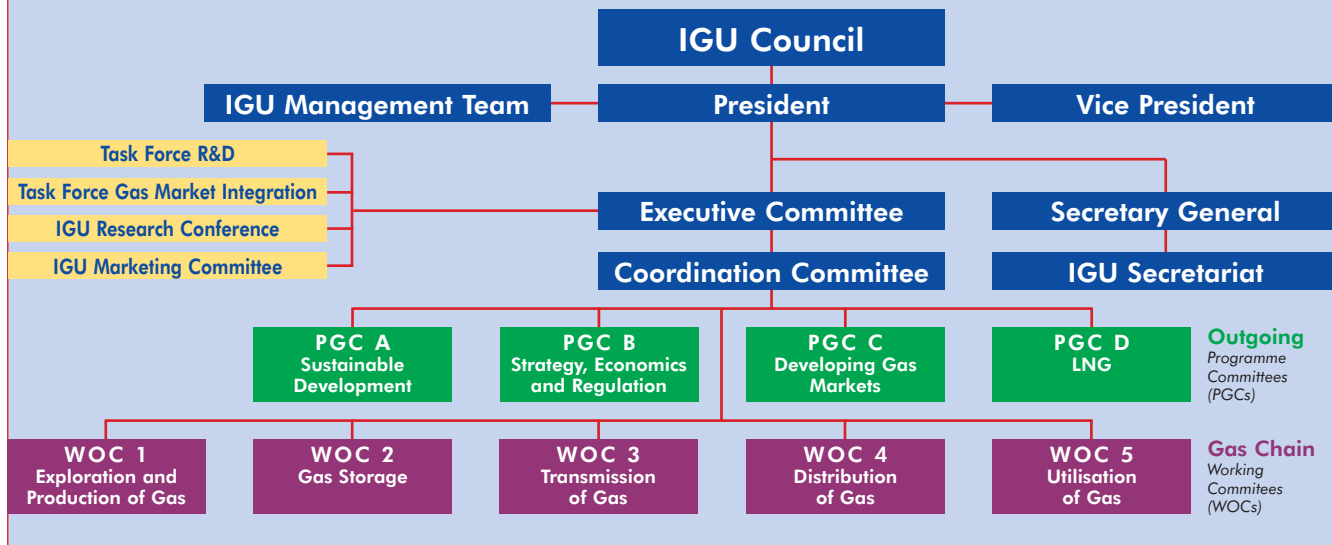


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With the founding of the new **RWE Gas Midstream GmbH**, RWE will further strengthen its competitive position in the Gas market. RWE Gas Midstream will focus on the economic optimisation of the entire gas portfolio of the RWE Group and further strengthen and develop relationships to existing and new suppliers whereby fully utilising the growing gas exploration and production business of RWE Dea – for both pipeline gas and LNG. RWE Gas Midstream has the economic responsibility of the non-regulated physical gas midstream assets and will from this basis expand the gas capacity position of the RWE Group.



IGU Organisation



The IGU Secretariat is currently hosted by the Danish company DONG Energy in its offices in Hørsholm outside Copenhagen.

IGU MANAGEMENT TEAM



Mr Ernesto López Anadón, IGU President (Chairman) (Argentina)



Datuk Abdul Rahim Haji Hashim, IGU Vice President (Malaysia)



Mr George H. B. Verberg, Immediate Past President (The Netherlands)



Mr Roberto D. Brandt, Chairman of IGU Coordination Committee (Argentina)



Mr Ho Sook Wah, Vice Chairman of IGU Coordination Committee (Malaysia)



Mr Peter K. Storm, Secretary General

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Rahal
Algeria

Mr Ernesto López Anadón
Argentina

Mr Roberto D. Brandt
Argentina

Mr Otto Musilek
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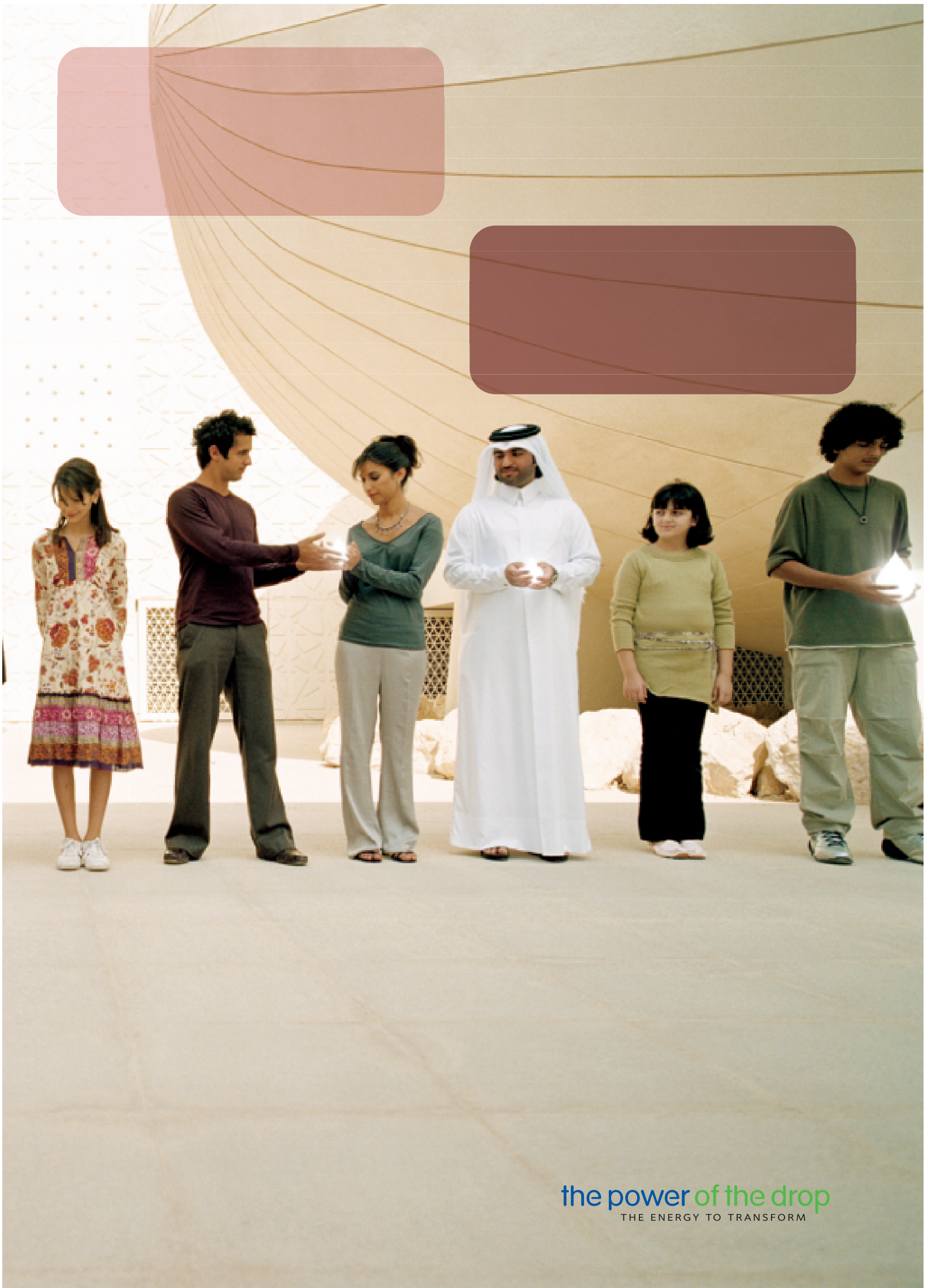


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the power of the drop
THE ENERGY TO TRANSFORM



From the IGU Secretariat



Petter Nore, Deputy Secretary General.



Lotta Hällén-Kragh, Assistant to the Secretary General and Webmaster.



Barbara Anette Schmid, Assistant to the Secretary General.

These pages feature news items and information from the Secretary General (PKS), his Assistant and Webmaster (LHK) and his new Assistant (BAS). However, comments and suggestions of general interest from members or other organisations may also be displayed here. When submitting contributions to the Secretariat please ensure that any electronic pictures are supplied in a high resolution – 300dpi is the minimum required for print reproduction.

● EXC is meeting in the registered domicile of IGU...

Neutral Switzerland is an appropriate place for the legal base of an international organisation and IGU is registered in the little town of Vevey on Lake Geneva between Lausanne and Montreux. Over the years the local gas distribution company, today part of Holdigaz, has assisted IGU in many ways vis-à-vis the local authorities.

Now Holdigaz and the Swiss gas industry are assisting us further by hosting the Executive Committee (EXC) and Coordination Committee (CC), when they meet in Montreux at the beginning of May.

Apart from day-to-day business and a special workshop organised by the IGU Presidency, members of the two Committees will have the opportunity of visiting the legal base of the Union and experiencing the famous town of Montreux.

PKS



Montreux is the venue for the first EXC and CC meetings of 2007.

● **.... and the Council will be back in Europe**

The Charter Member for the Russian Federation, Gazprom, has invited IGU to stage the 2007 Council meeting in St Petersburg, October 22-25. The last time the Council visited the city was in 1981 (when it was called Leningrad), while the Executive Committee met there in 1997 towards the end of the Danish Presidency.

St Petersburg is a beautiful city and the social programme will include a dinner at the Marble Palace, which was designed by Antonio Rinaldi on the orders of Catherine the Great and built between 1768 and 1785. It is now part of the State Russian Museum. There will also be a technical visit to the Lentransgas facility outside St Petersburg in the region of Leningradskaya.

PKS

● **IGU subscription fee 2007**

The continued commitment of the IGU membership to paying subscription fees on time is one of the strengths of the Union. The level of outstanding payments is very low compared to other organisations of a similar size and structure. Generally the membership payment instructions go out in February and within a few days the annual dues from members start appearing in our bank account. Should any IGU member be in any doubt regarding this issue, please contact the Secretariat.

LHK

● **Cooperation with IEA**

In November 2006 the IGU Management had a very successful meeting with the International Energy Agency (IEA) based in Paris. Headed by President Ernesto López Anadón, IGU's delegation met Claude Mandil, the Executive Director of IEA and his colleagues to discuss further cooperation in a number of areas.

Among a number of initiatives, IEA agreed to participate in IGU's *2030 Natural Gas Industry Outlook* study and to assist in the study on energy



St Petersburg is the venue for the 2007 Council meeting.

efficiency started by Working Committee 5, while IGU agreed to assist IEA with its new annual publication *Natural Gas Market Review*, the first edition of which was launched by Mr Mandil at the World Gas Conference in Amsterdam last year.

It was also agreed that IGU members might second young employees to IEA for a limited time and I have written to all Charter and Associate Members informing them of this opportunity.

PKS



There is a long tradition of close cooperation between IGU and WPC. Both, for example, are founder members of the Global Forum for Oil, Gas and Energy Event Organisers (OGE). Peter Storm is seen with HSH Prince Albert at the first OGE meeting in Monaco last year. A second OGE meeting is scheduled for July.

● IGU supports second Belgrade gas conference

In 2004 IGU supported the International Conference on Development in the Gas Industry of South and East European Countries in Transition, which was held in Belgrade. Since this conference was very successful with some 300 delegates from 22 countries in the region attending, the Gas Association of Serbia has decided to stage a second event. The Association is the Charter Member for Serbia and IGU has agreed to assist in providing keynote speakers and by financing an award for the best papers from young engineers.

The conference is scheduled to take place June 12-15 in Belgrade and I recommend that interested readers attend. It is being organised by BBN Congress Management, which handled the previous event. Further information is available at www.bbn.co.yu/e-Gas2007.htm.

PKS

● PETROSEC 2007

Behind this abbreviation lies an upcoming conference on the Petroleum Supply Chain and Security (PETROSEC) and Safety and Security of Energy Infrastructures in a Comparative View (SEIF-CV). The conference is being organised by the University of Salzburg, the European Commission's Joint Research Centre through its Institute for Energy and the US Center for Contemporary Conflict, and will take place in Salzburg, Austria, September 16-19.

As IGU Secretary General I have accepted an invitation to become a member of the Scientific Committee, which is responsible for the conference programme, and in that

capacity I am aiming to give the Union a high profile at PETROSEC through the participation of experts from the relevant IGU Committees.


If you want to know more about this conference you should contact the IGU Secretariat or go to www.enersec.at.

PKS

● Deadline for WPC call for papers is September 1

There is a long tradition of close cooperation between IGU and the World Petroleum Council (WPC). Every three years WPC holds a Congress and Exhibition similar to IGU's World Gas Conference and IGU is normally asked to assist in organising one or more natural gas sessions. This was the case at the 18th World Petroleum Congress in Johannesburg in 2005 and will also be the case for the 19th Congress taking place in Madrid in June 2008.

In addition, the IGU Management encourages IGU members and their staff to represent the Union by submitting abstracts for papers to be presented at the Congress. The invitation to send in



Transition activities

Efficiency
and savings

Sustainability

Improvement of
climate and
environment

Moment of impact

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