



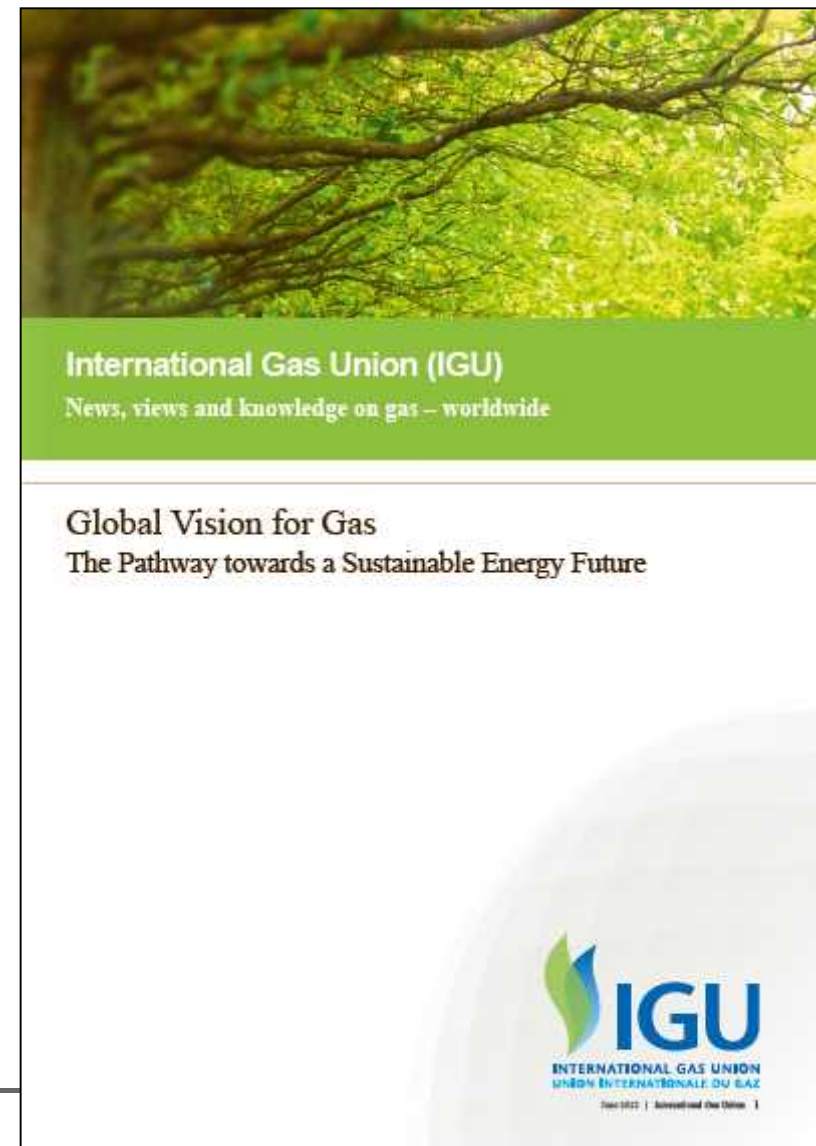
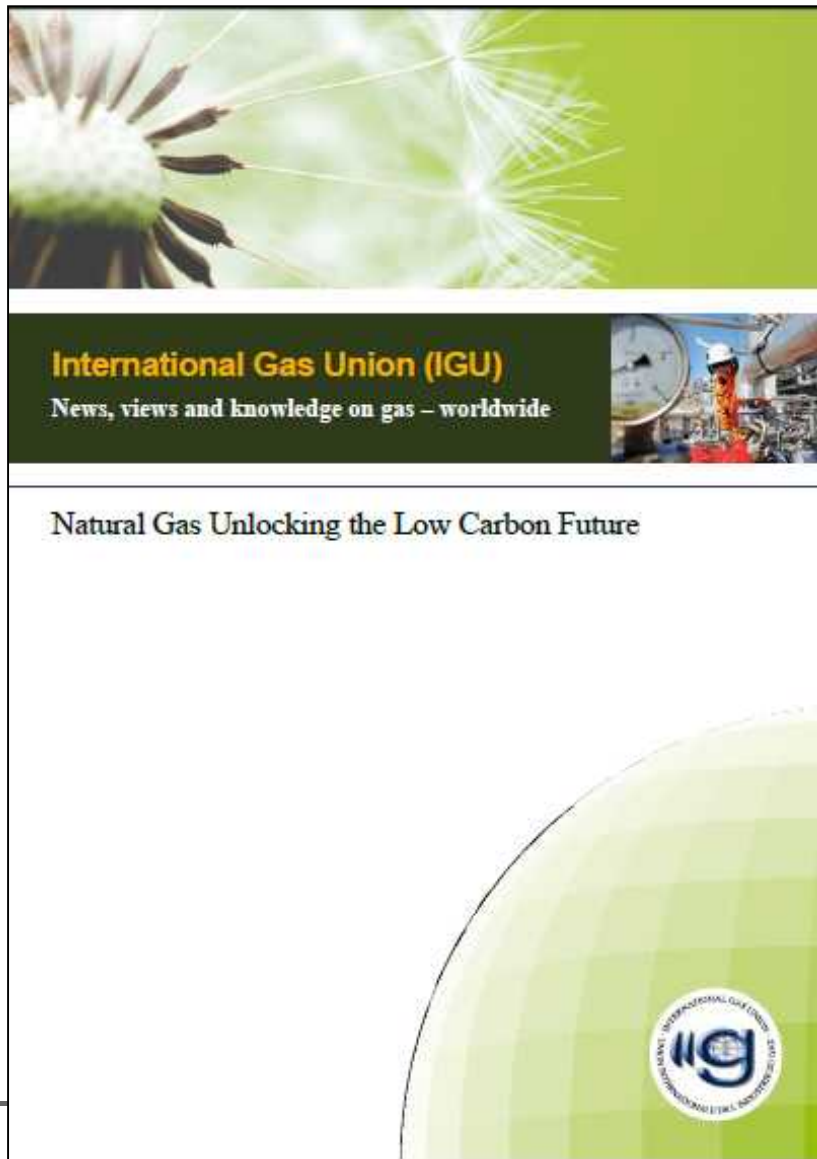
Looking forward to 2050

What are the decisions in 2025 that will shape the gas market in 2050?

PGC B meeting Oran, Algeria,
26-28 October

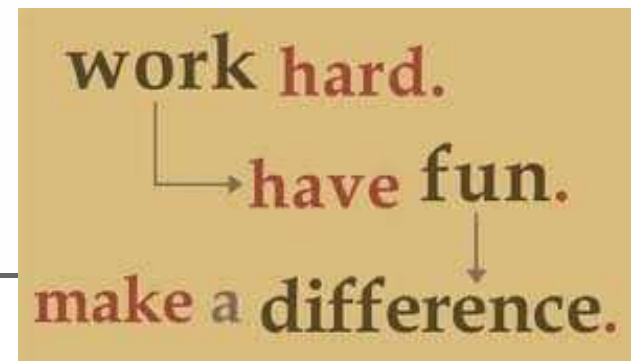
12 november 2012

Looking back (2009 and 2012)



Goal 2050 Natural Gas Perspective 2012-2015

- I GU official publication 26th WGC Paris 2015 and presentation at WGC in Paris
 - Inspiring, food for thought, easy to read
- Have fun while delivering a good result!
- We can not predict the future, so we propose:
 - Identify key developments for the decisions to be taken in 2025 that will shape the gas market in 2050
- What are these key developments
 - What are the triggers for these developments
 - What could be the consequences of these developments
 - How should the gas industry anticipate on these developments
- Developments
 - Global spread and across the Gas Value Chain
 - Active participation securing quality



Key developments that will shape 2050

Each of us to:

- Identify three potential key developments that could shape the 2050 gas market
 - that shape the decisions made in 2025-2035
- Decide which region is most interesting for that key development
 - Middle East & Africa; Asia Pacific, Americas, Europe and CIS
- Determine which of the three key developments has the largest impact on the world gas market
- Write them on a piece of paper
 - Red: very high impact
 - Orange: high impact
 - Yellow: modest impact



Content

- Identifying key topics/ developments across the globe and sectors

	Upstream	Midstream	Downstream
Middle East & Africa	?	?	?
Asia Pacific	?	?	?
Americas	?	?	?
Europe and CIS	?	?	?

- Just a few examples:

- Very cheap solar power: Middle East and Africa
- Cheap unconventional gas: Asia pacific
- Gas for transport: Americas
- Stringent energy conservation: Europe and CIS



Getting there... (information collection)

- Step A: literature survey
 - Previous 2 IGU reports
 - Available expert studies
- Step B: enhancing the knowledge
 - Students/internet forums
 - Regional forums: business & academics
 - Judgment by unique experts
- Step C: 4 regional reports; ~10 pages, Q1 2014 delivered by our regional initiators: ..., ..., ..., ...



Planning

- 2012: Determine scope, required sources and available resources
Determine key developments
- Q1&Q2 2013: Information collection (existing material)
- Q3&Q4 2013: Knowledge enhancement and regional forums
- Q1 2014: Drafting regional reports
- Rest of 2014:
 - deriving conclusions
 - updating the information
 - drafting final report
- Q1 2015: finalizing and printing report and time to relax....



Cooperation with other (IGU) groups...

Make optimal use of knowledge within and synergies with IGU PGC's WOC's and IGU affiliated organisations for example:

IGU

- PGC D: LNG
- PGC F: Research and Innovation
- Taskforce 3 Geopolitics
- LNG17 conference steering committee
-,.....

Affiliated

- NGV Global
- Gas Technology Institute
- Etc,etc.

