



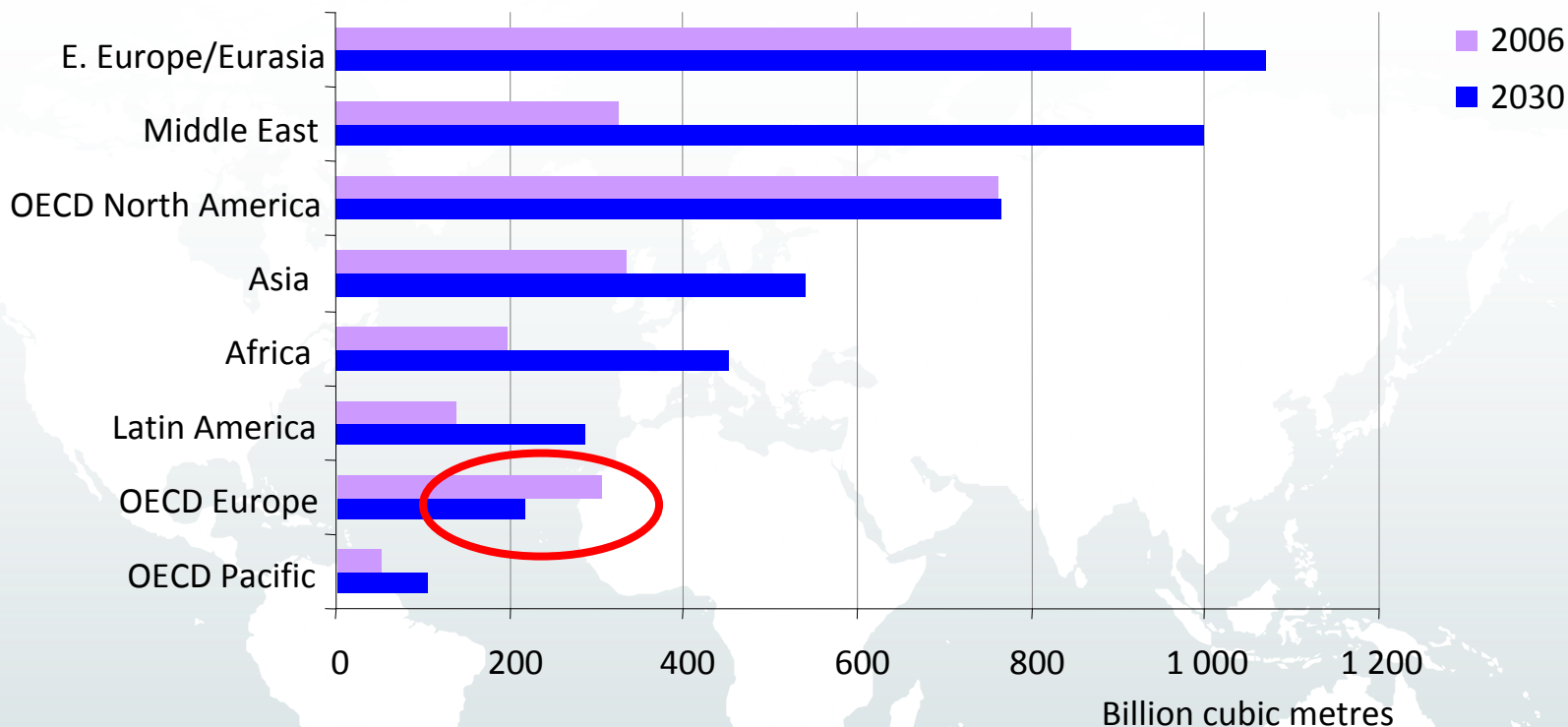
International  
Energy Agency

# Security of Gas Regulation in the EU

*Hearing of the European Parliament,  
Brussels, 9 November 2009*

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Head Emergency Policy Division IEA*

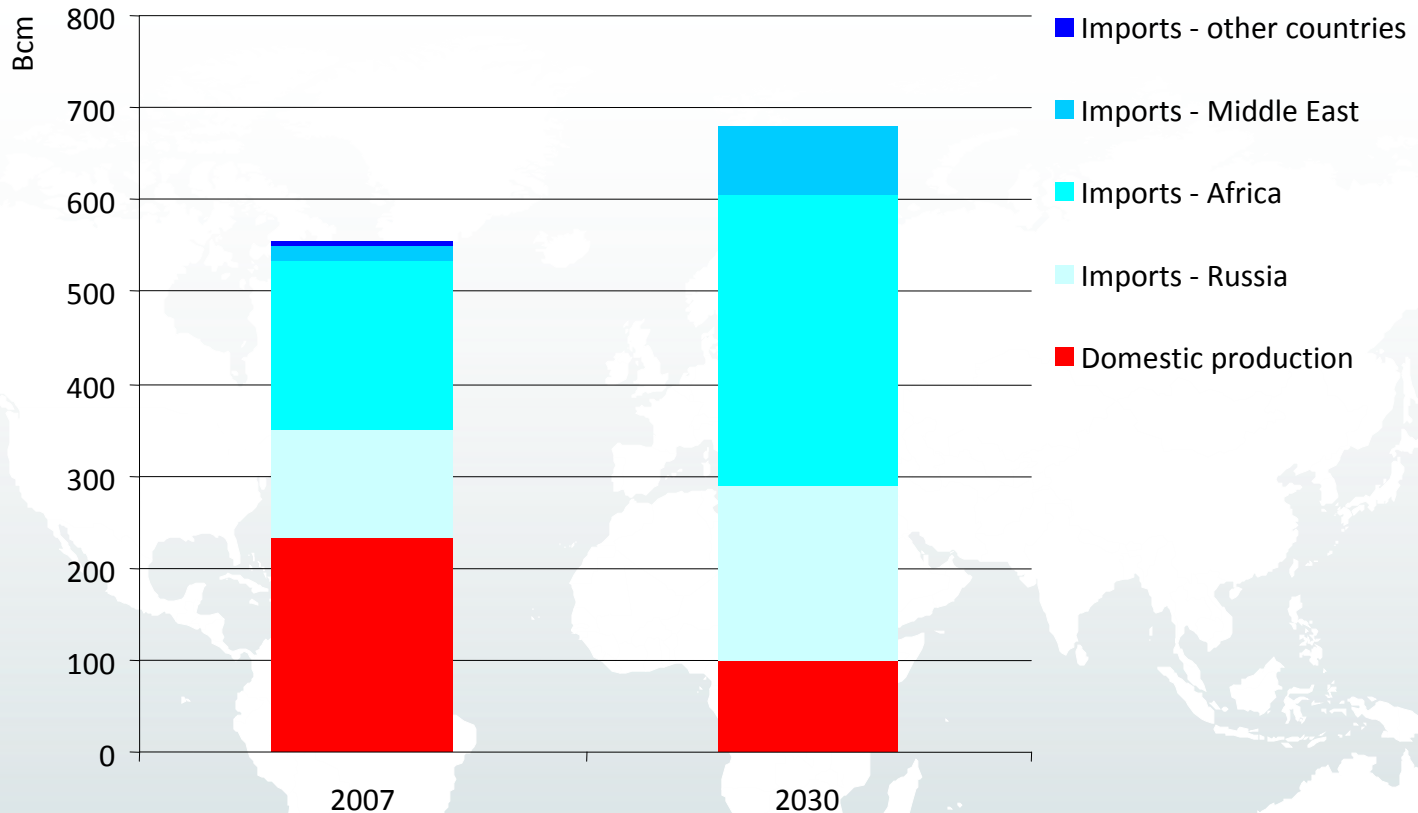
# Reference Scenario: Natural gas production



Note: OECD Europe includes Norway

**Gas production: 46% of the growth to 2030 will be coming from the Middle East, its output tripling to over 1 tcm**

# EU natural gas market outlook



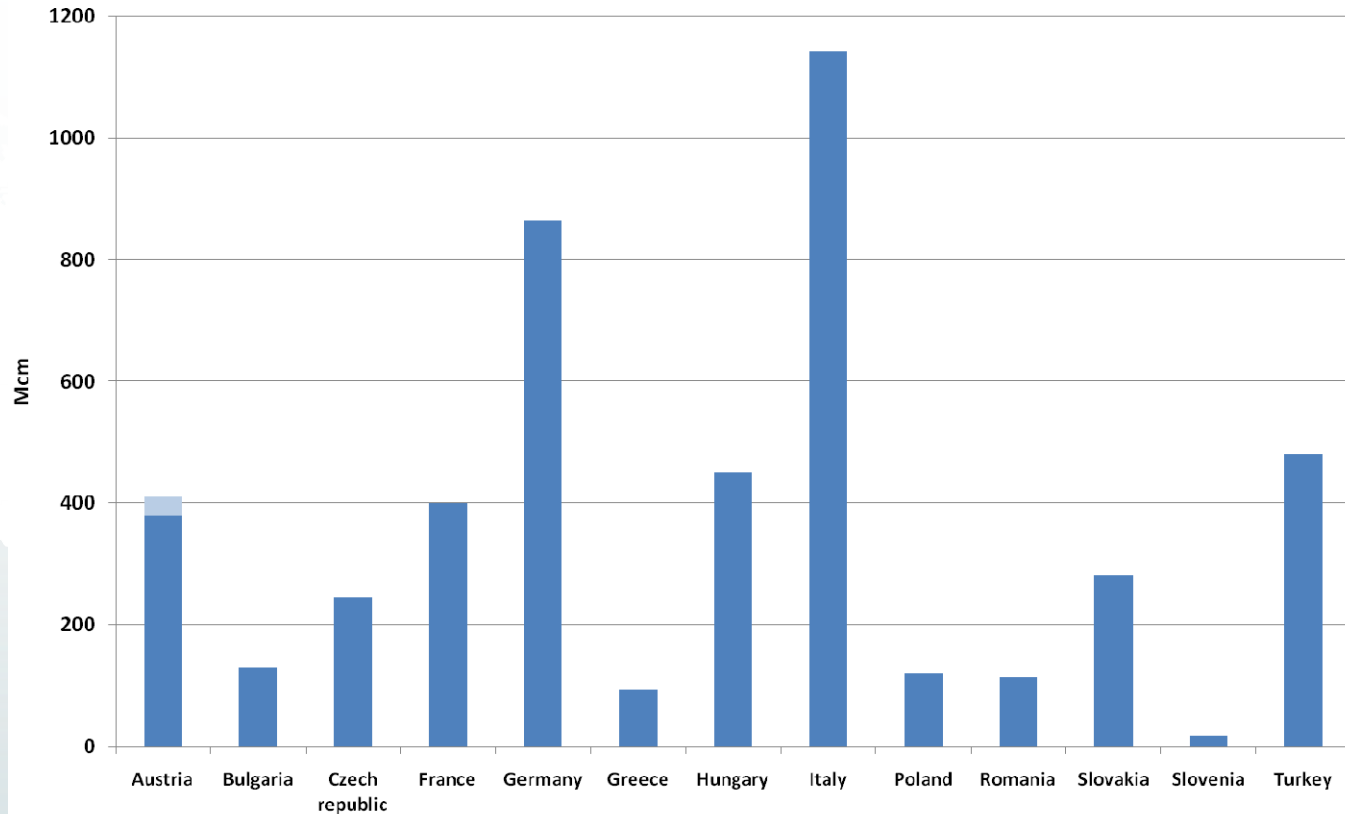
***EU import dependency rises from 58% today to 86% in 2030 as a result of declining domestic production and increasing demand***

A faint, light blue world map is visible in the background of the slide, centered behind the main text.

# Russia – Ukraine disruption

# Russia – Ukraine January 2009

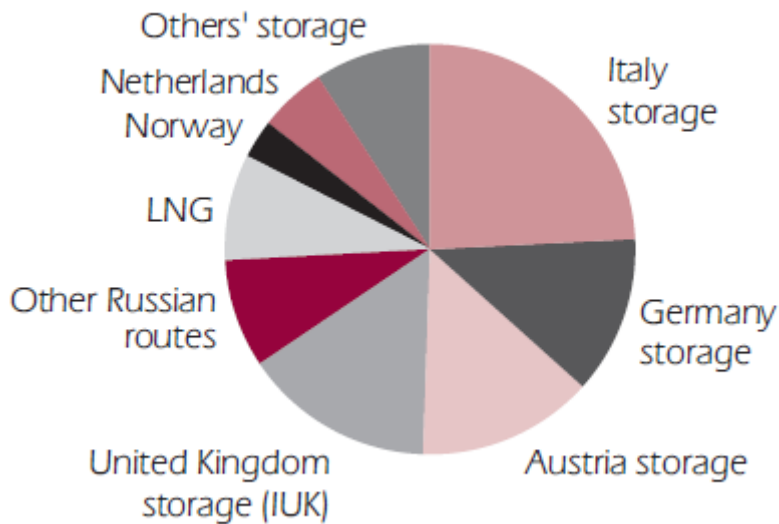
## Missing Russian volumes 5 bcm



Source: IEA, NGMR 09

Note: Austria estimated

# How Europe faced the supply disruptions



Source: IEA, NGMR 09

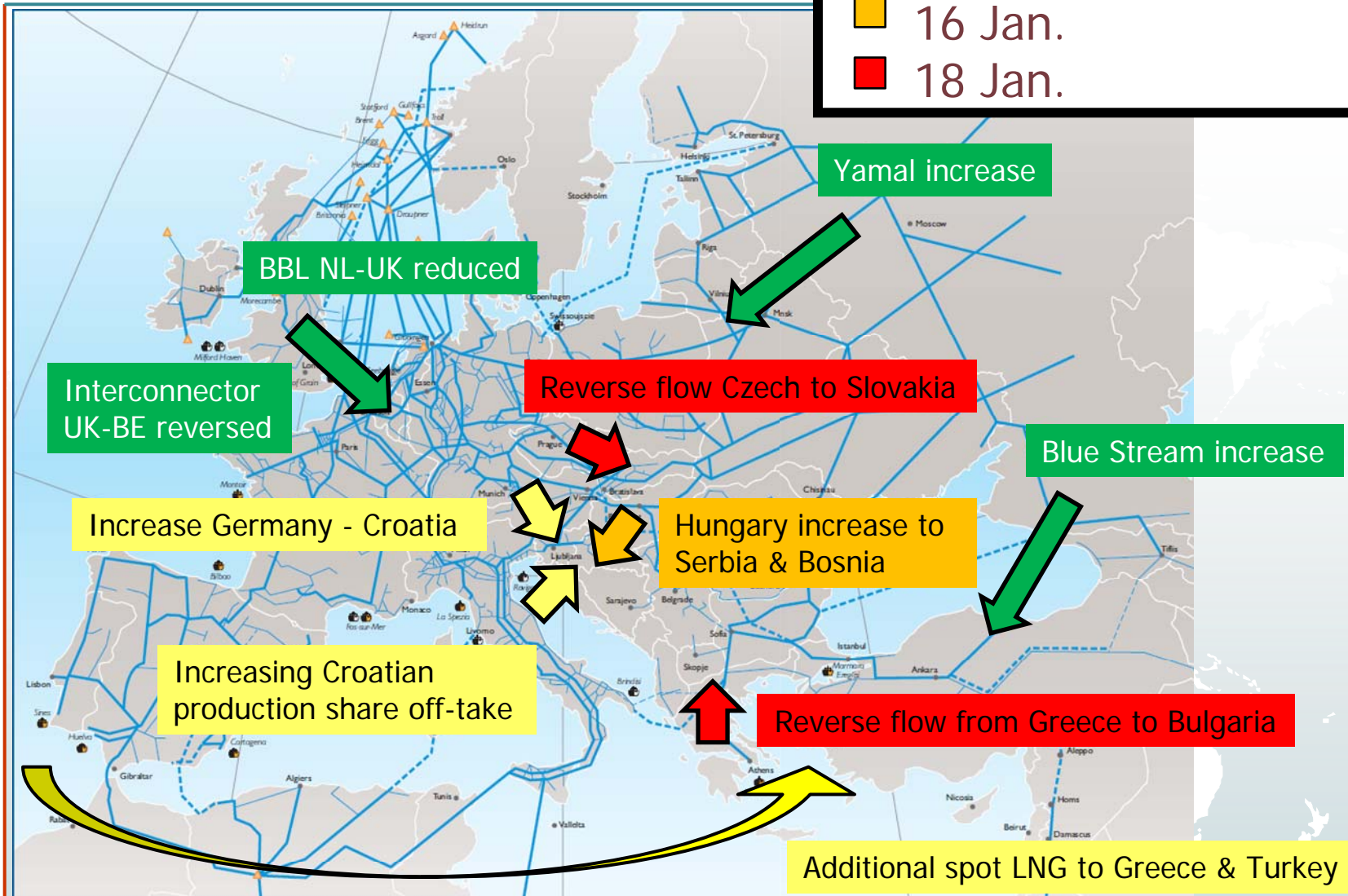
- Storage was key: 75%
- Additional supplies were provided by
  - imports from existing suppliers
  - alternative routes
  - LNG (SE Europe)
- Functioning markets supported by inter-connections are essential to transport gas where it is needed



# Cross border responses

## Timeline

- 7 Jan. (immediate)
- 10 Jan.
- 16 Jan.
- 18 Jan.



# Thank you

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