

OME AS A THINK TANK MEDITERRANEAN ENERGY PERSPECTIVES

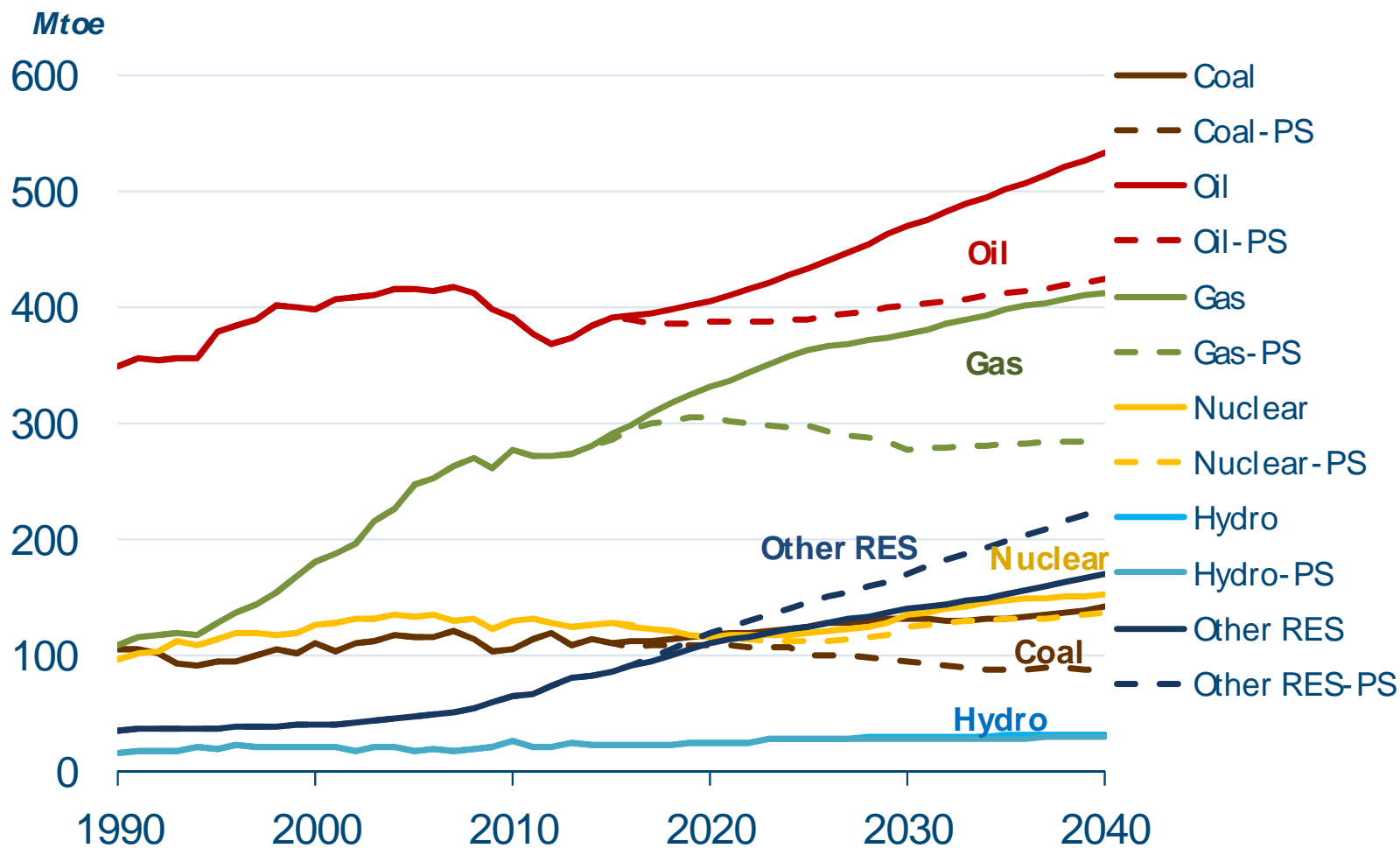
08-09-2015 Update



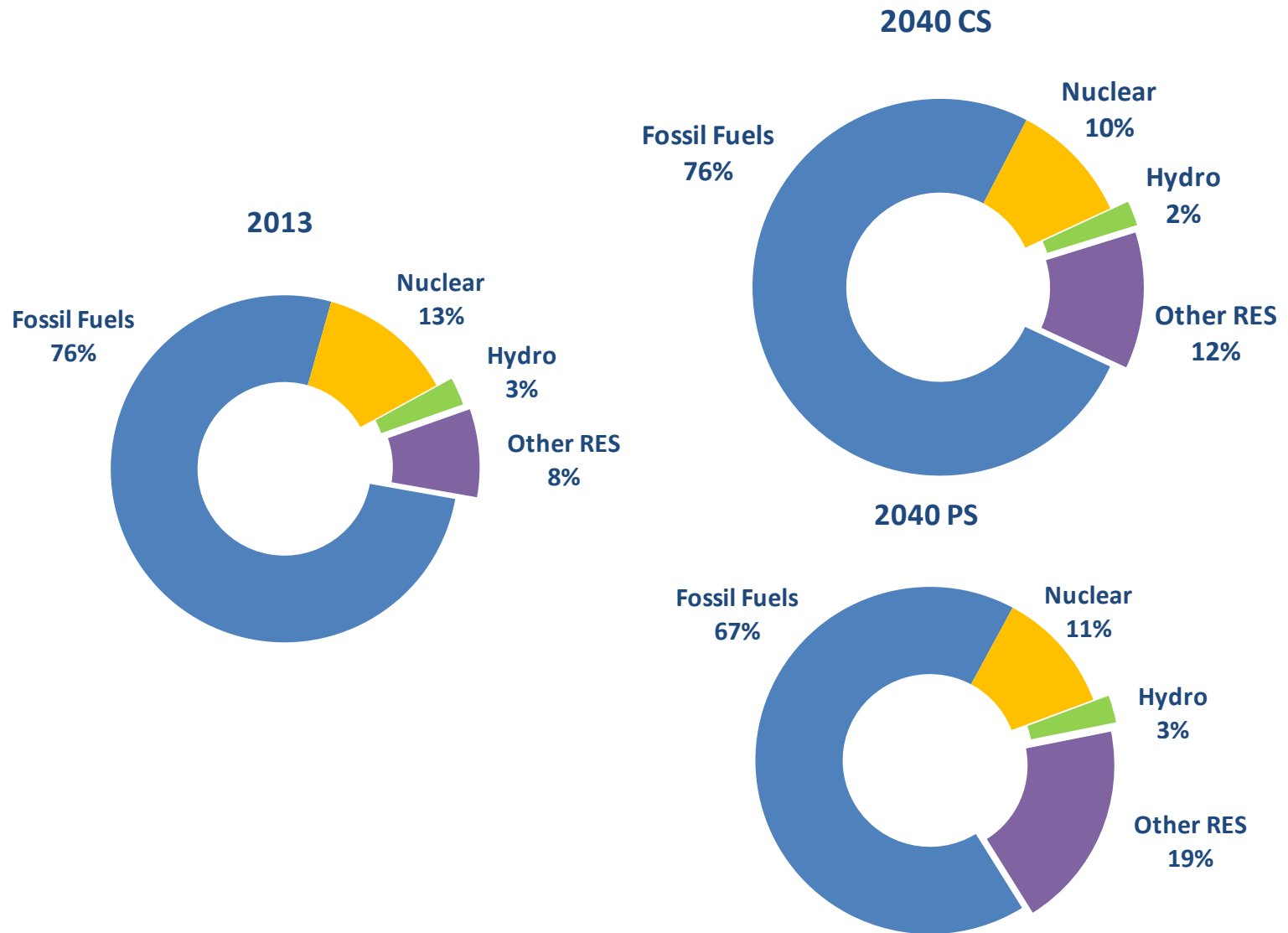
Observatoire Méditerranéen de l'Énergie

ENEA CONFERENCE
ROME, 22ND SEPT. 2015

PRIMARY ENERGY DEMAND BY FUEL BY SCENARIO

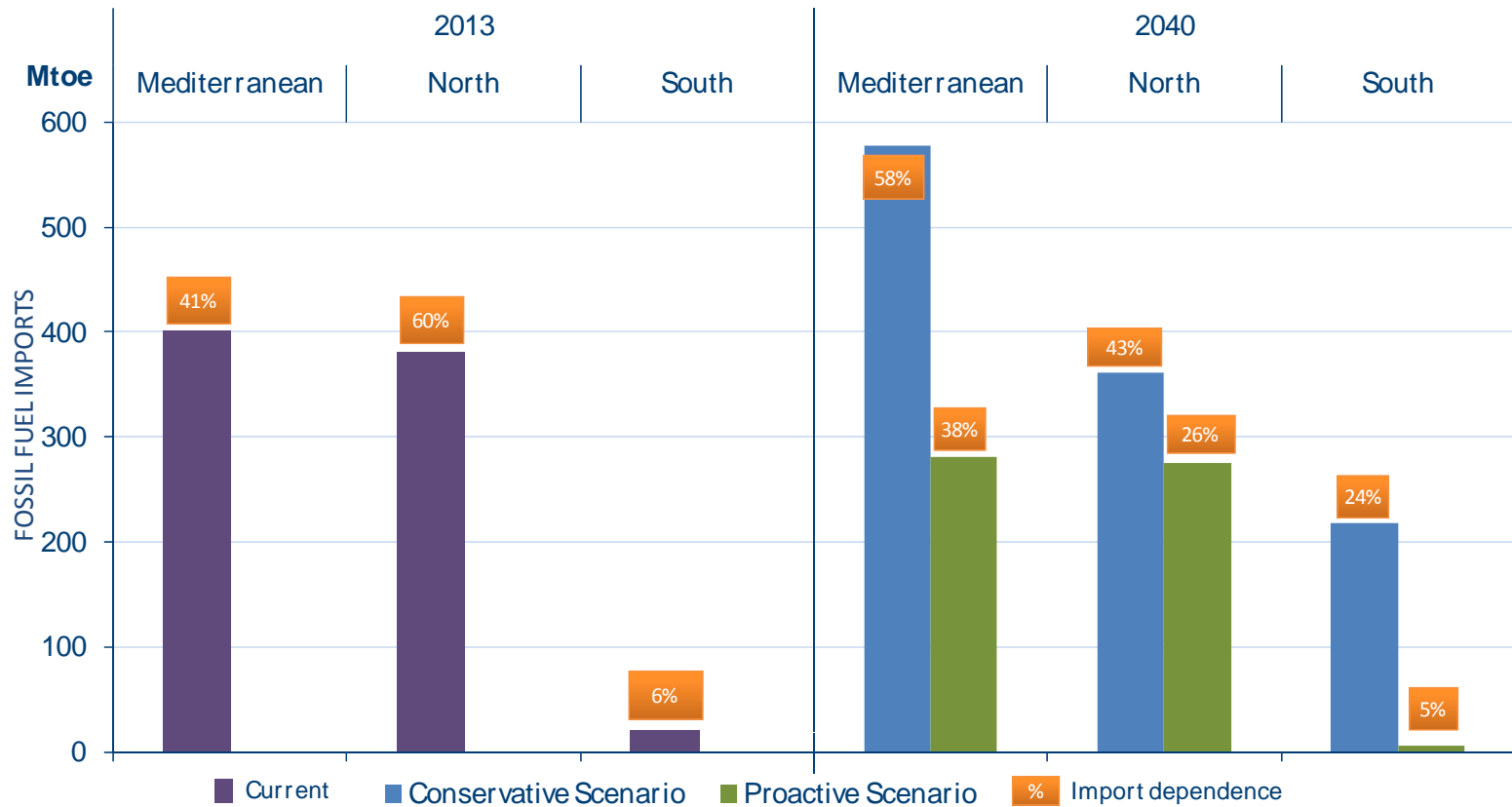


MED ENERGY DEMAND SHARES



The mix remains fossil fuel based

FOSSIL FUEL IMPORT DEPENDENCE



OME AS A PLATFORM SECRETARIAT

Union for the Mediterranean Gas Platform

The Gas Platform - Background

- **From Malta to Rome... Brussels to Rabat ... Brussels to Barcelona**
- **Interim Steering Committee:**
 - Algeria, Cyprus, Egypt, Italy, Malta, Spain, Tunisia, EC, UfMs, Eurogas, GIE, MEDREG, OME, Platform Secretariat, open to all members states and stakeholders willing to contribute
- **Conclusion of the 1st ISC meeting in Brussels 5 March 2015**
 - Working Group led by the Platform Secretariat to prepare a factual background report entitled: *Common challenges for the development of a mutually beneficial Mediterranean gas market place*
- **2nd Preparatory meeting: 11 May 2015 in Brussels (enlarged)**
 - Further discussion on governance and first elements on the background report

The Gas Platform – Background (cont'd)

- **Launch of the Platform: 11 June 2015 in Brussels**
 - Final Terms of reference of the Platform
 - First draft of the background report
- **The Secretariat prepared different meetings and elaborated and distributed minutes to participants**
- **Next steps:**
 - Next meeting of the Platform, September in Malta
 - Final approval of the ToR
 - Finalisation of the background report
 - Elaboration of the Platform work programme (activities and events) & 2015 activities
 - Implementation of the 2015 activities
 - UfM Ministerial meeting end 2015, early 2016

The Gas Platform – Background (cont'd)

- **Terms of Reference, final draft**
- **Background Report, almost finalized**
 - **Comments for final round of review by Sept 4**
- **Roadmap under definition**
 - **Suggestions open until Sept 4**

The Gas Platform ToR suggested next steps

	June	July	August	September	October	November	December
Collection of comments as per the 11 June decisions							
Comiplation of suggestions	X						
Sending of an update version		X					
Discussion by the SOM		X					
Update version elaboration			X				
Last round of comments							
Final draft sending				X			
Final version approval by the SC					X		
Ministerial meeting approval							X

The Background report

*“Common challenges for
the development of a mutually beneficial
Mediterranean gas market place”*

Contents

- Chapter 1. Security of demand**
- Chapter 2. Security of supply**
- Chapter 3. Infrastructure challenges**
- Chapter 4. Euro-Med gas hub**

Why the report?

- **Decision of the 1st ISC meeting on March 5**
- **To give an expert review of the situation and challenges for gas in the Euro-Mediterranean region.**
- **The content should be factual and descriptive; no conclusion or recommendation.**
- **Basis for the elaboration of the Platform roadmap**
- **Prepared by a Working Group (willing contributors) facilitated by the Platform Secretariat**
- **Meeting of the Working Group in Paris, 13 April 2015: Algeria, Egypt, Spain, Tunisia, EEAS/EU, EC, Eurogas, GIE, MEDREG, OME, Platform Secretariat**
- **Final version is almost ready**

The Gas Platform Background Report - steps

	March-June	July	August	September	October	November	December
Drafting (several rounds of inputs and comments)	[Green shaded]						
Sending of a new draft for comments		29					
Second round of comments			28				
Incorporation of comments and intercation with contributors as needed				X			
Sending of final draft				X			
Approval of the report					X		
Dissemination of final version					[Green shaded]		

The Gas Platform Work Programme

- **Ongoing activity**
- **Call for suggestions launched on 11 June**
- **Feedback received from the co-presidency, Cyprus, GIE, Greece, Eurogas and OME**
- **Deadline for suggestions: Sept 4**
- **Preliminary rich list of suggestions**

The Gas Platform suggested activities – preliminary, non-exhaustive list

- Review of the status of regional gas markets (incl Supply & Demand scenarios)
- Infrastructure (pipelines and LNG)
- Gas a clean fuel for transport
- Regulation: Infrastructure, project selection and cross border issues
- Transparency and TSO cooperation
- Share practices on technological options related to sustainability and safety practices in energy operations in the Med
- Projects of Euro-Mediterranean Interest
- Working Group dedicated to identify potential production capacity of the Med producing countries, assess benefits of common infrastructures and exchange best practices to promote relevant investments
- Financing, communication and outreach
-

The Gas Platform suggested events - preliminary

- Eastern Mediterranean Gas Conference
- Infrastructure challenges in the Euro-Mediterranean gas Market
- Development of global gas contractual models and consequences on the Euro-Mediterranean gas market
- a Conference dedicated to the Eastern Mediterranean region Energy Regional Cooperation. Cyprus proposes to host the event.
- Workshop on production capacity of the MED region and benefits of potential common infrastructures.
- Companies/businesses oriented info conferences with specially designed workshops in order to have the sector on board throughout the decision making process.
- Security of Gas Supply around the Mediterranean Sea (or another subject pertaining to the Platform) organized by DEPA
- Synergies with regional/int'l conferences



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