Challenges of the Energy Supply in the 21st Century

Jérôme Ferrier, President IGU

RIO OIL & GAS, 19 September 2012
GAS RESERVES IN THE SOUTHERN CONE – 2011 vs 2001
CEDIGAZ - Tcf

Argentina 7.8 14.7
Brazil 9.9 14.7
Peru 9 12.5
Bolivia 23.8 9.9

+226 Tcf Shale Gas?
(EIA/ARI)

+774 Tcf Shale Gas?
(EIA/ARI)
GAS PRODUCTION OUTLOOK – BRAZIL & ARGENTINA
IEA WEO 2011 – New Policies Scenario (Bcm)
BRAZILIAN GAS SUPPLY AND DEMAND
BRAZILIAN DEPARTMENT OF ENERGY (Bcm)

Sources: Historical data: Balance energetico 2011 (MME)
Forecast: Matriz energetica 2030 (MME)
PIPPINES & LNG INFRASTRUCTURE
TOTAL 2012

Liquefaction Facilities
- Existing
- Planned

Regas Terminals
- Existing
- Planned

Operating Pipelines

Planned Pipelines
1. FOSTER INFRASTRUCTURE INTEGRATION BY ENSURING THE BANKABILITY OF NEW TRANSCONTINENTAL GAS PIPELINES AND CROSS BORDER INTERCONNECTION.

- Exemption of Third Party Access
- Use of an international currency reference
- Differentiation of the regulatory rates of return

2. ENSURE COMPATIBILITY OF TARIFF SYSTEMS BETWEEN NATIONAL AND TRANSIT FLOWS.

- Harmonization of tariff structures
- Elimination of « pancaking » of tariffs at the border
- Promotion of the « entry-exit » tariff system within balancing zones
3. SIMPLIFY ACCESS TO PIPELINES FOR CROSS-BORDER SHIPPERS

- Harmonization of the main cross-border access rules for shippers
- Development of a secondary market of cross border capacity
- Adressing the issue of a set of commun rules for shippers

4. DEVELOP A REGIONAL LEVEL OF INTEGRATION, INITIATIVE AND PROGRESS FOR THE GAS INDUSTRY.

- Initiatives of « open seasons »
- Development of hubs and market places
- Fostering of market coupling and extension of balancing zones
« OBRIGADO PELA SUA ATENÇÃO »