



ГОСУДАРСТВЕННАЯ
ДУМА
ФЕДЕРАЛЬНОГО СОБРАНИЯ
РОССИЙСКОЙ ФЕДЕРАЦИИ

Россия – Евросоюз Энергетический форум

ЕДИНАЯ ЭНЕРГЕТИЧЕСКАЯ ПЛАТФОРМА –
ОСНОВА БЕЗОПАСНОГО БУДУЩЕГО ЕВРОПЫ:
ПОВЕСТКА ДНЯ РОССИИ И ЕВРОСОЮЗА

Европейский парламент, Страсбург, 10-11 декабря 2013 года

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Russia – EU Energy Forum

A COMMON ENERGY PLATFORM –
THE BASICS OF A SECURE FUTURE FOR EUROPE:
THE AGENDA OF THE EU AND RUSSIA

European Parliament, Strasbourg, 10-11 December 2013

www.energyforum.pro



PARLAMENTUM EUROPAEUM

The EU-Russia Energy Dialogue: history, results, and prospects

Alexey M. Mastepanov

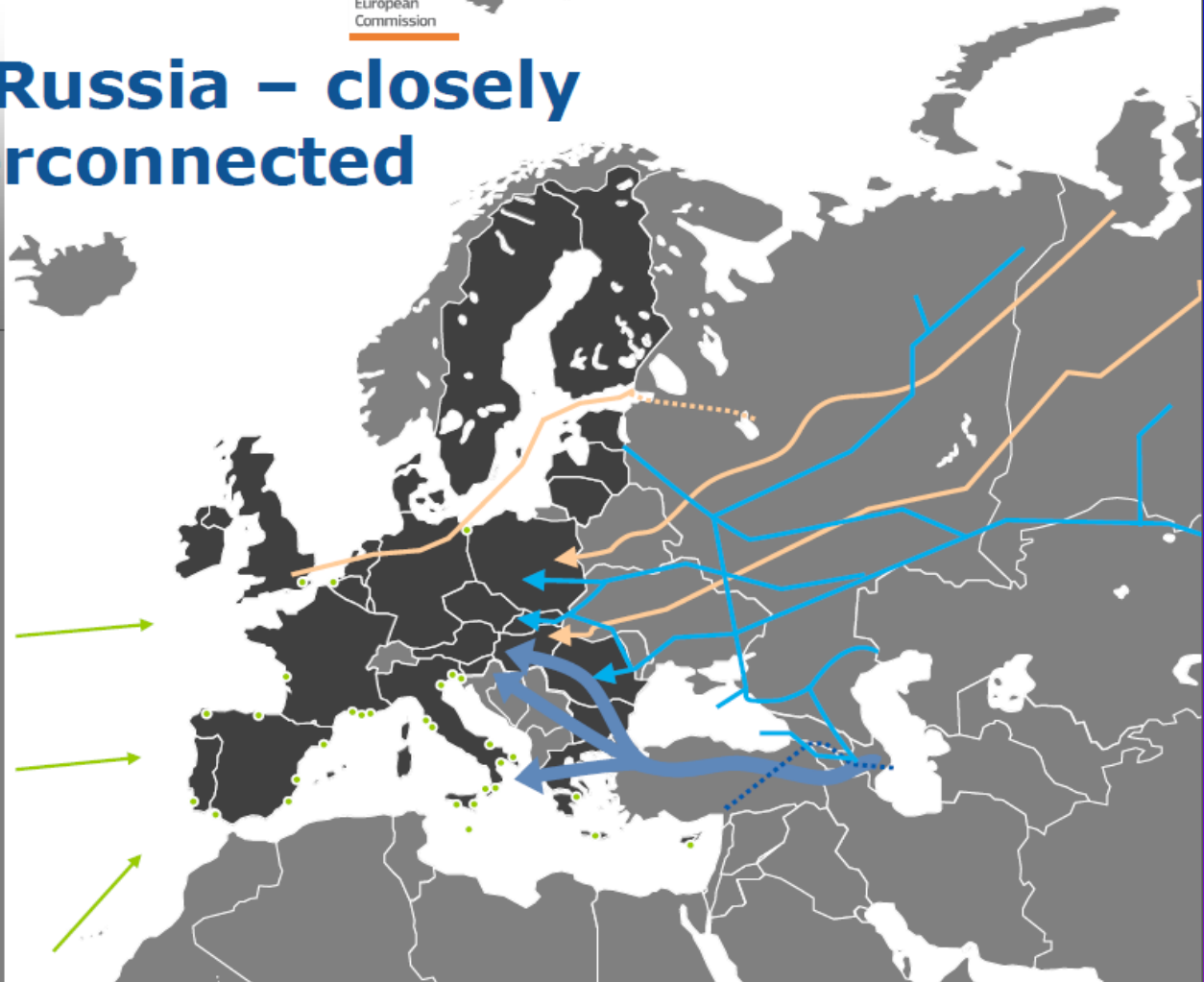
**Depute Director Oil and Gas Research Institute of
Russian Academy of Sciences,
Member of the Board of Directors of Institute of Energy
Strategy**

Strasbourg - 10-11 December 2013



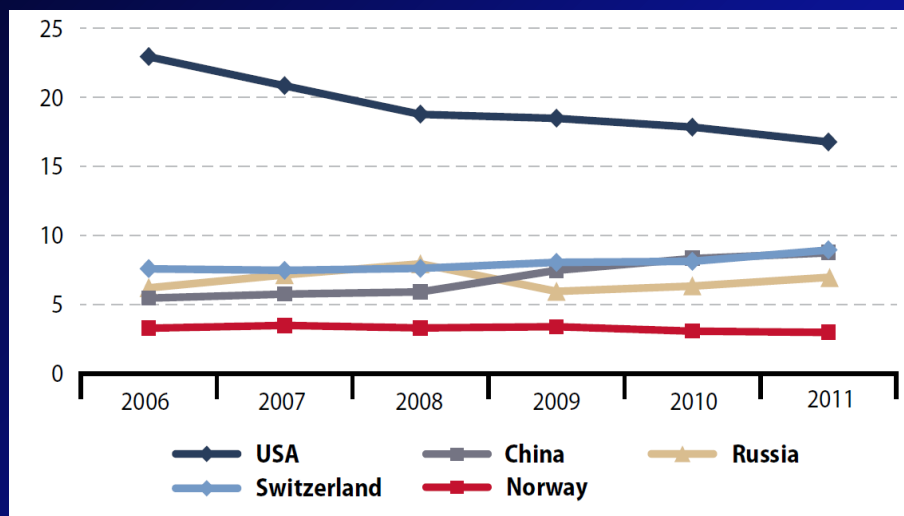
EU – Russia – closely interconnected

- Oil pipeline connections
- Gas pipeline connections
- Southern gas corridor
- LNG terminals

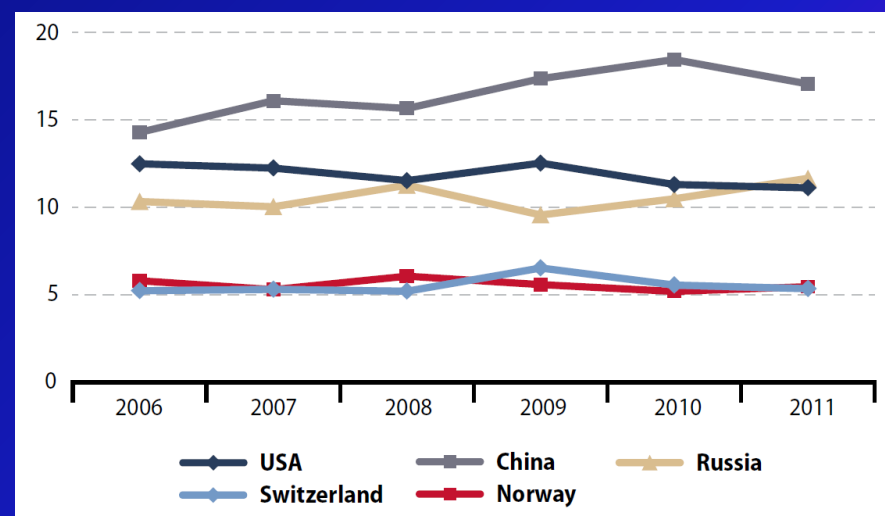


Основные торговые партнёры ЕС-27 в 2006-2011 гг., % Main trading partners' shares of EU-27, 2006-2011 (%)

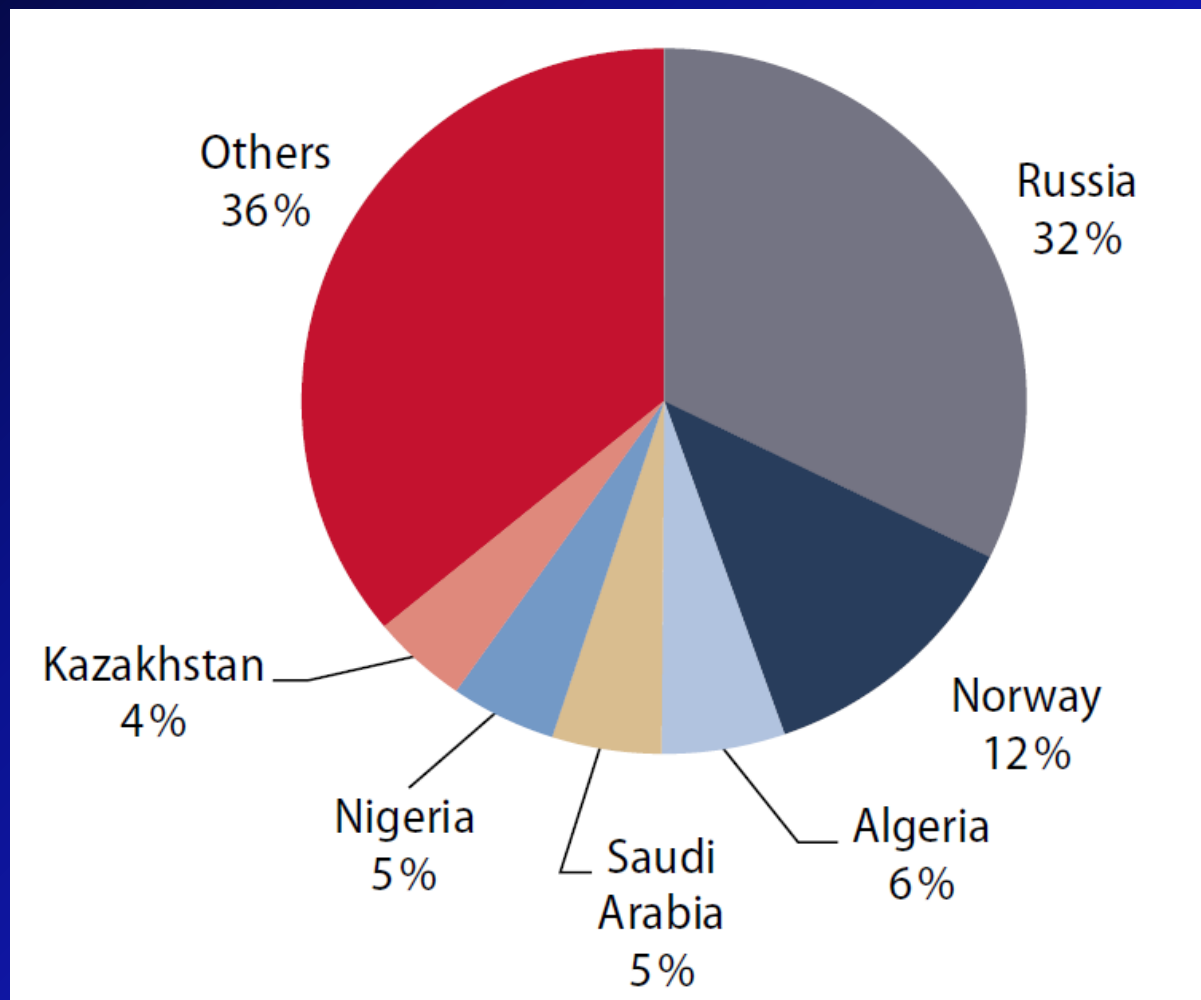
Экспорт товаров Exports of goods



Импорт товаров Imports of goods

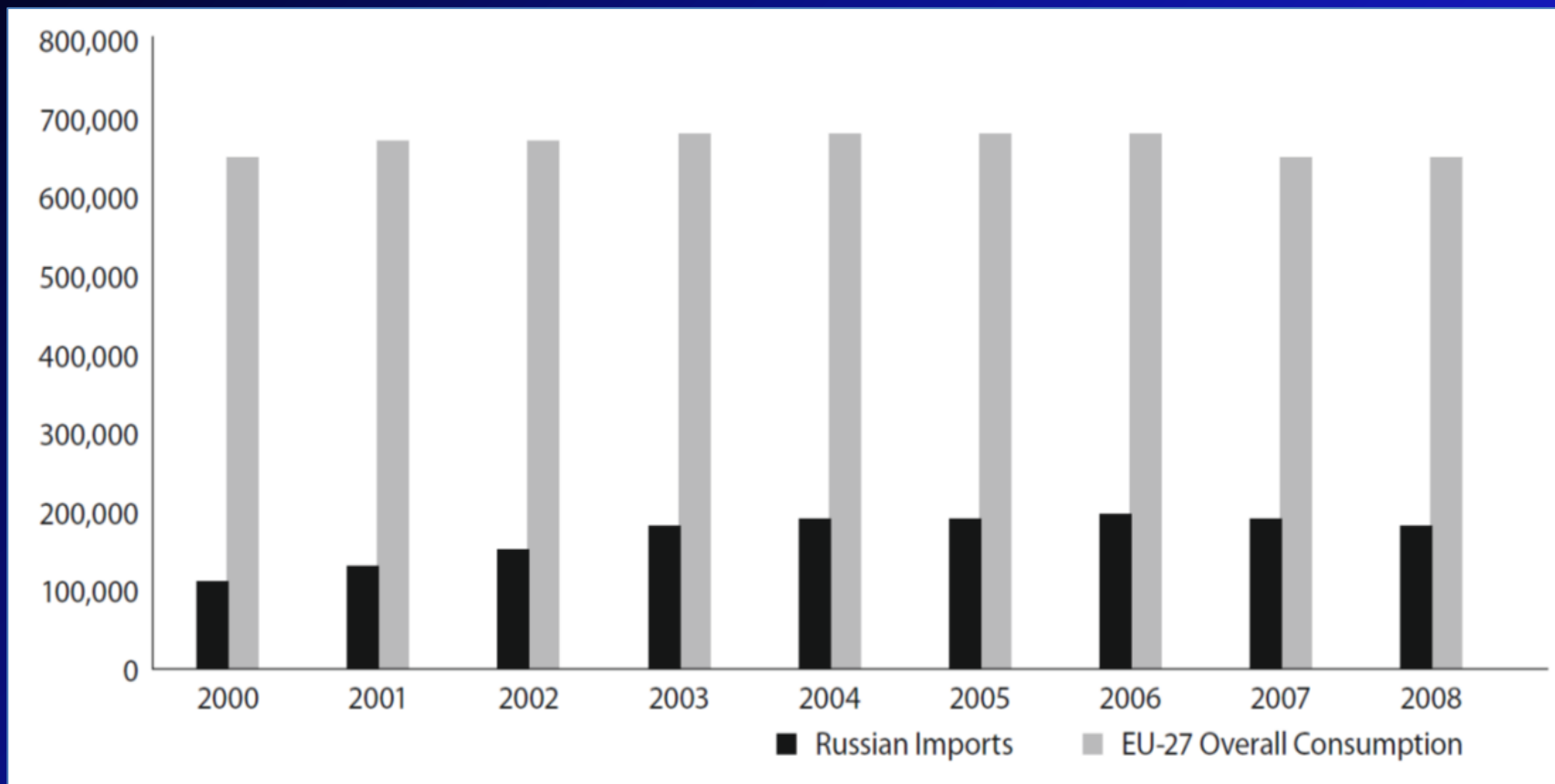


Основные торговые партнёры ЕС-27 в сфере энергетических продуктов в 2011 г. (%) **Main trading partners' shares of EU-27 imports of energy products, 2011 (%)**



Source: Eurostat

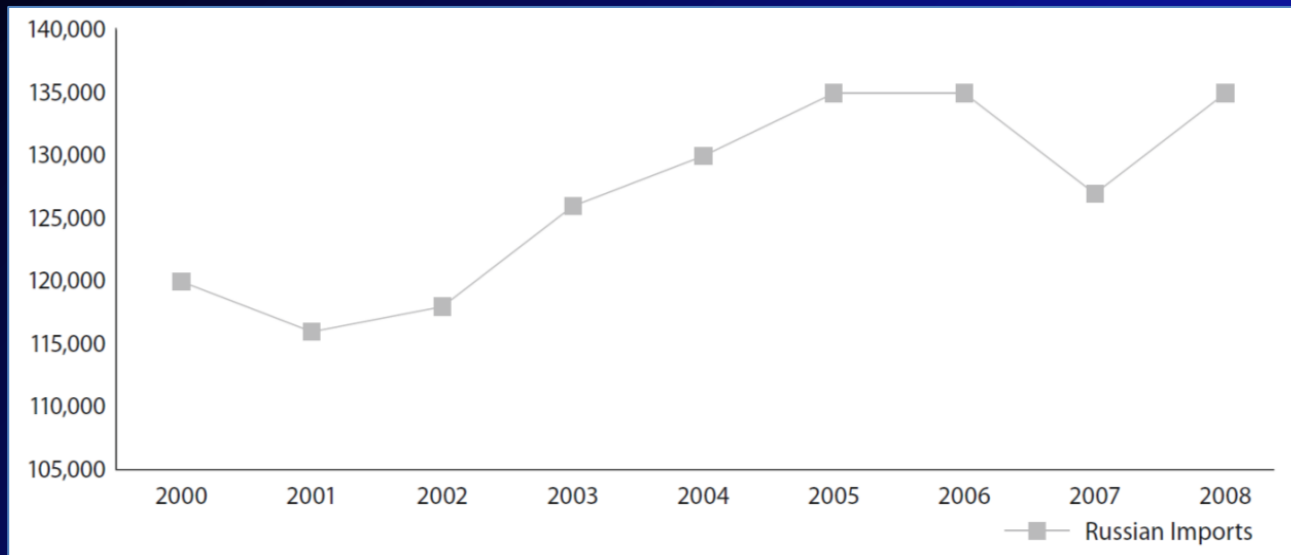
Валовое внутреннее потребление нефти в ЕС-27 и импорт её из России за 2000 – 2008 гг. **Oil: EU-27 gross inland consumption and imports from Russia between 2000 – 2008**



Source:

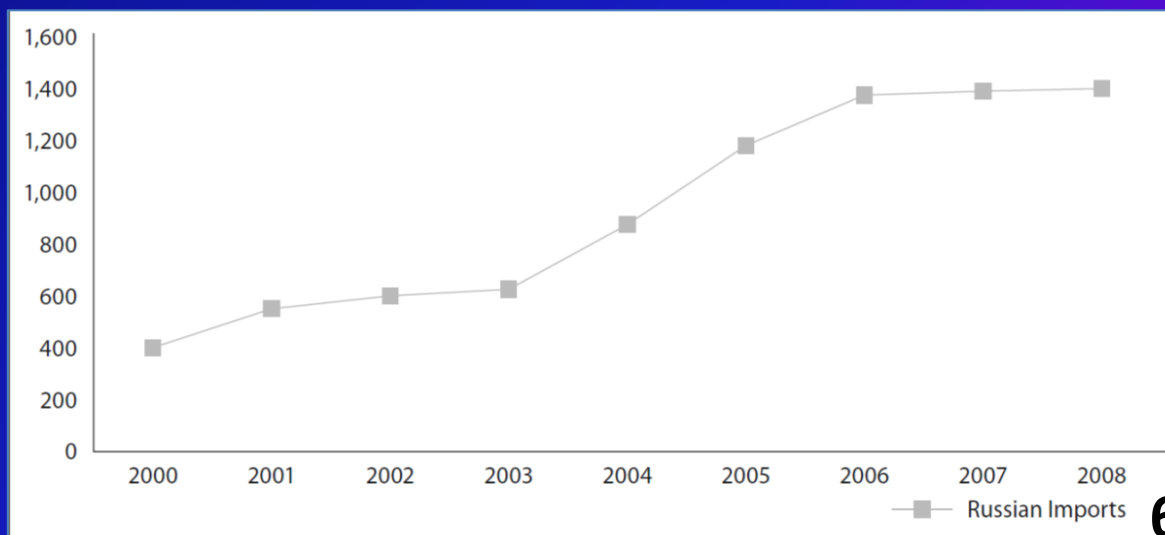


Импорт природного газа ЕС-27 из России за 2000-2008 гг. Natural Gas: EU-27 imports from Russia between 2000 – 2008



ЕС-27: импорт каменного угля из России за 2000-2008 гг.

Hard Coal: EU-27 imports from Russia between 2000 – 2008



Source:



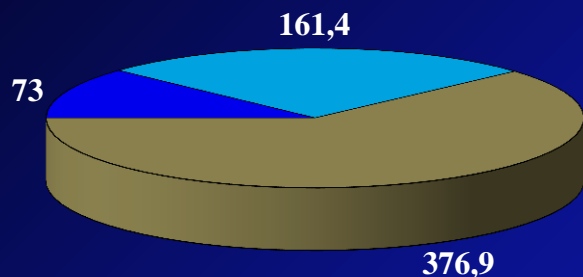
Объём и структура потребления основных энергоресурсов в ЕС-27 в 2012 г.

Volume and structure of consumption of the main energy in the EU-27 in 2012

Нефть Oil

ЕС, всего EU - total

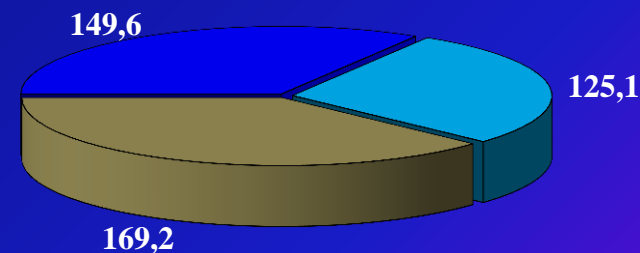
млн. т **611,3** Million tonnes



Газ Gas

ЕС, всего EU - total

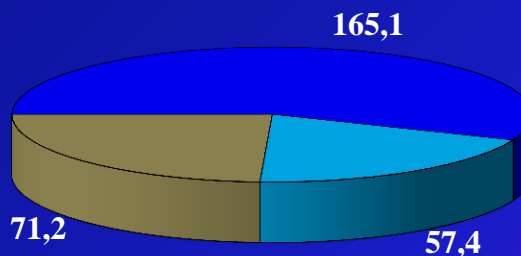
млрд. м³ **443,9** BCM



Уголь Coal

ЕС, всего EU - total

млн. т н.э. **293,7** MToe



- Собственная добыча
Domestic production
- Импорт из России
Import from Russia
- Импорт из других стран
Import from other countries

Source:



Зависимость России от Евросоюза Russia's dependence on the European Union

- 45% импорта России приходится на ЕС
45% of the Russian import is from the EU
- Доходы в российский бюджет от экспорта сырья в ЕС составляют около 40%
Revenues of the Russian budget from export of raw materials to the EU is about 40%
- на страны ЕС приходится 75% накопленных иностранных инвестиций в России
the EU countries account for 75% of accumulated foreign investments in Russia

Главный вывод: Россия и ЕС являются взаимозависимыми партнёрами

The main conclusion is that Russia and the EU are interdependent partners

Joint Declaration

of the President of the European Council, J. CHIRAC, assisted by the Secretary-General of the Council/High Representative for the Common Foreign and Security Policy of the EU, J. SOLANA, of the President of the Commission of the European Communities, R. PRODI, and of the President of the Russian Federation, V. V. PUTIN

We, the leaders of the European Union and the Russian Federation, meeting in Paris for the sixth summit since the entry into force of the Partnership and Cooperation Agreement (PCA), reaffirm the particular importance we attach to strengthening our strategic partnership, based on the principles of democracy, respect for human rights, the rule of law and the market economy.

The policy of reforms instituted in Russia heralds the beginning of a new stage in its development which the French Presidency's work programme aims to support. The implementation of these reforms will contribute to the development of our relations. The EU has reaffirmed its willingness to bolster this process, based on the PCA and on its common strategy on Russia. The primary objective of this cooperation, which is entering into a new phase, will be to support the institutional, economic and social reforms, with a view to strengthening the rule of law and meeting the democratic requirements of a modern economy and society. The TACIS programme in particular will be geared towards this goal, in consultation with the Russian authorities.

The recent meeting in Moscow of a round table of Russian and European industrialists also made it possible to identify opportunities for investment and trade which need to be maximised.

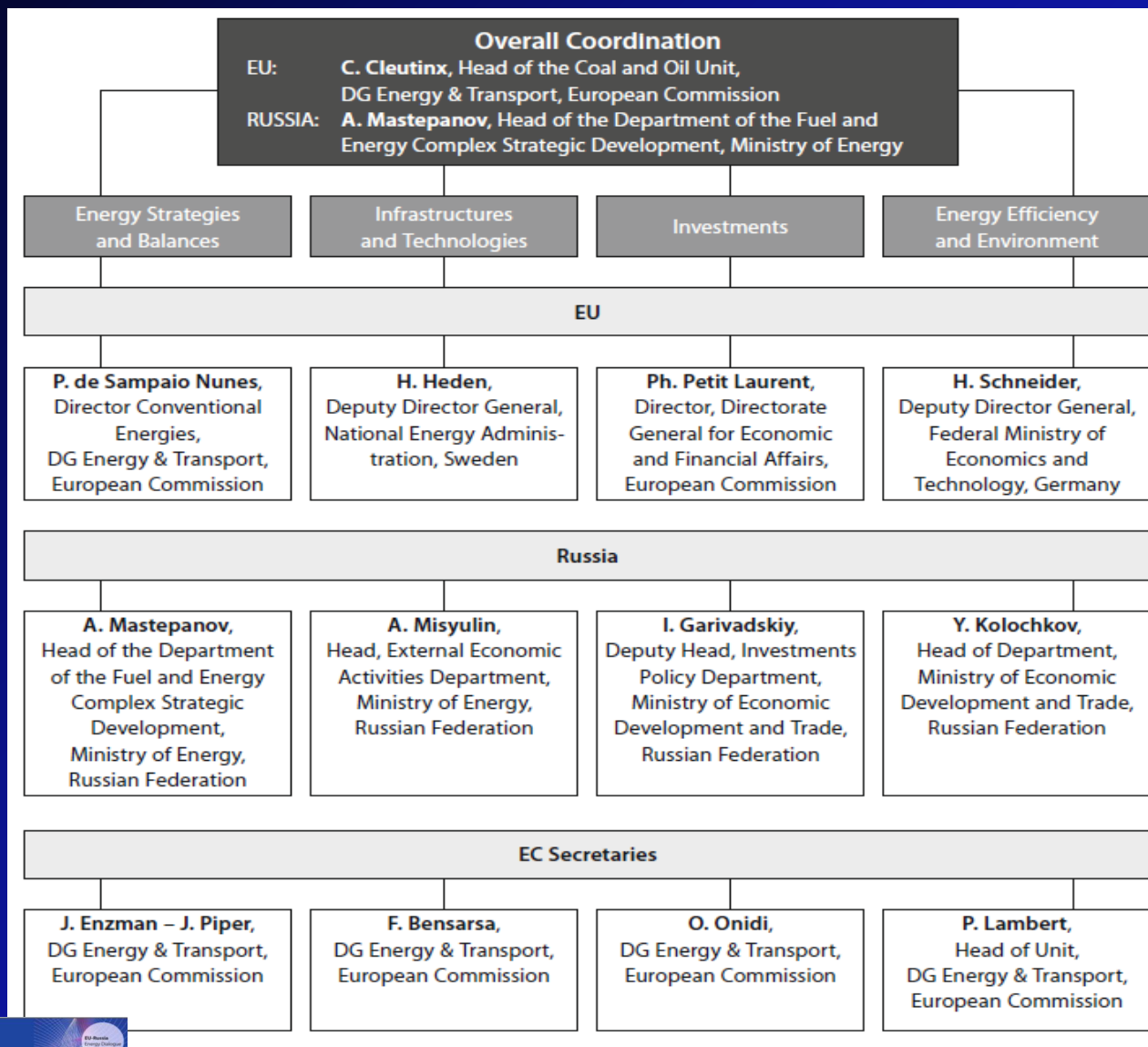
We regard Russia's speedy accession to the WTO as a matter of priority. The EU will continue to provide technical assistance in this context. The EU and Russia have agreed on the need to step up the work in progress in Geneva and, in particular, their bilateral negotiations on the conditions of access to markets in industrial products and services, on the basis of new offers to be submitted by Russia in the near future. The EU and Russia welcome the fact that a conference will be held in Moscow at the end of March 2001 on Russia's accession to the WTO.

The European Union and Russia have decided to institute, on a regular basis, an Energy Dialogue which will enable progress to be made in the definition of an EU-Russia energy partnership and arrangements for it. This will provide an opportunity to raise all the questions of common interest relating to the sector, including the introduction of co-

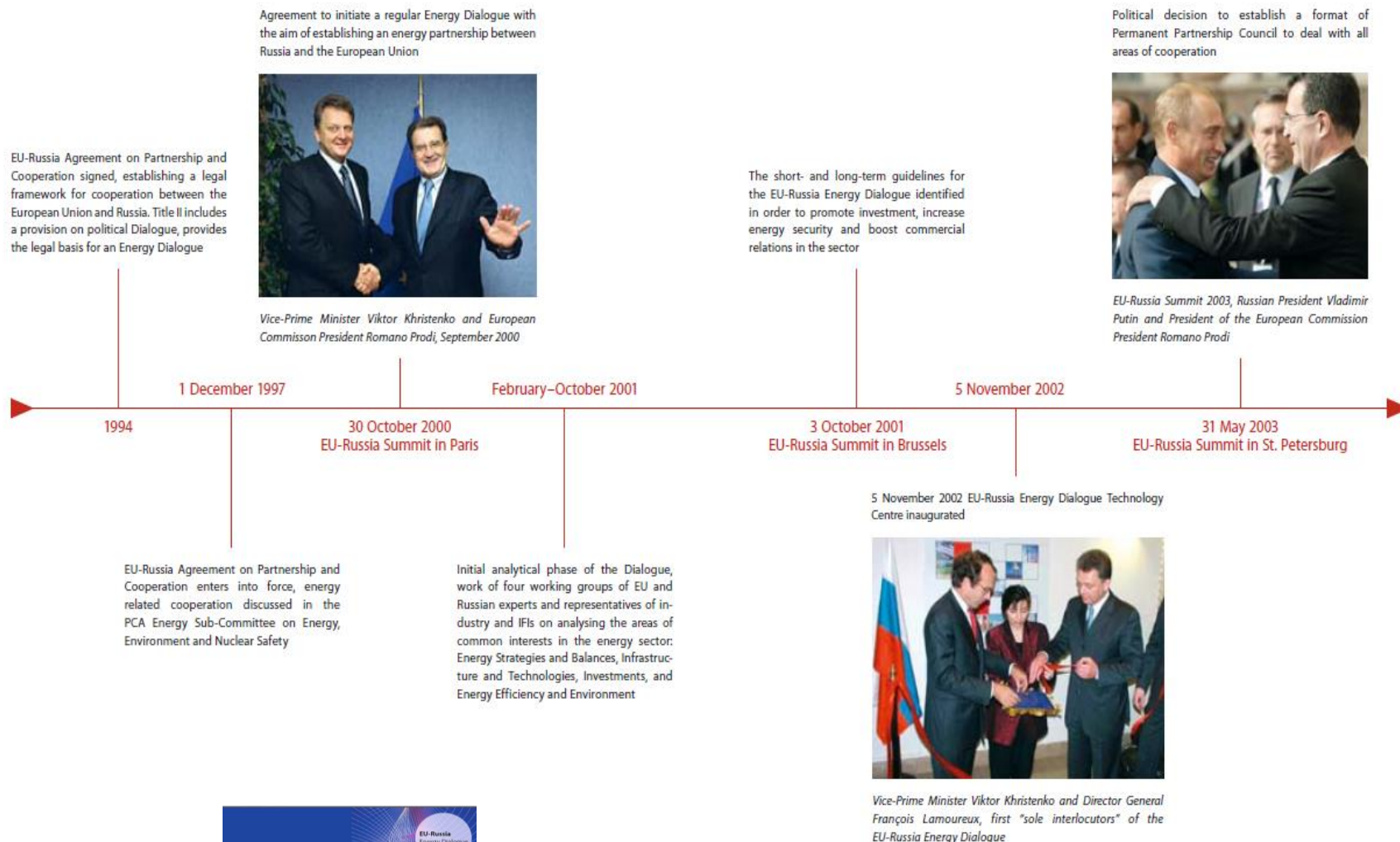
Source:



Structure of the EU-Russia Thematic Expert Groups of the Energy Dialogue in 2001



Timeline EU-Russia Energy Dialogue

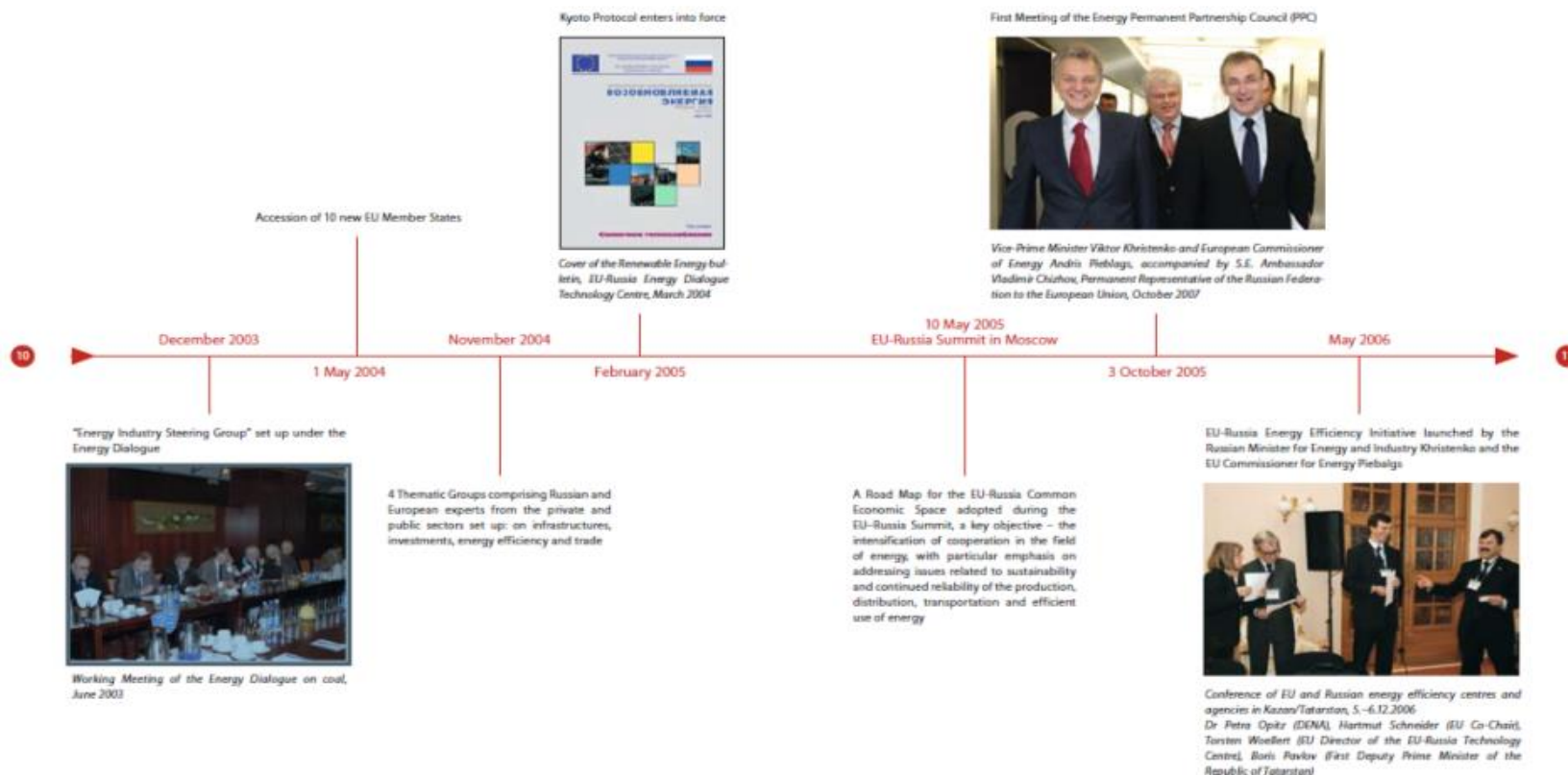


Source:



Historical Overview

Timeline EU-Russia Energy Dialogue



Source:



Historical Overview

Timeline EU-Russia Energy Dialogue

2nd Meeting of the EU-Russia Permanent Partnership Council on Energy



Experts' Meeting in the Ministry of Industry and Energy of the Russian Federation, 2006

A Sub-Group on Investments under the Thematic Group on Market Developments established



Meeting of the Sub-Group of Investments

Negotiations for a New EU-Russia Agreement launched to replace the Partnership and Cooperation Agreement (PCA). Common agreement that the existing PCA will remain in force until replaced by the new agreement



Reorganisation of the Thematic Groups:

- 1) a new Thematic Group on Energy Strategies, Scenarios and Forecasts
- 2) a Sub-Group on Energy Economics under Thematic Group 1 established,
- 3) the Thematic Groups on Trade, Investments, and Infrastructure merged into a single Thematic Group on Energy Market Developments,
- 4) the mandate of the Thematic Group on Energy Efficiency prolonged



Mikhail Soloviev (Russian Secretary of the Thematic Group on Energy Efficiency), EU-Russia energy conference, November 2007



3rd Meeting of the EU-Russia Permanent Partnership Council on Energy

Russia Energy Dialogue, C. Cloutier (European Commission Secretary of the EU-Russia Thematic Group on Energy Efficiency), Dr. Petro Opat (DINA), Sergey Mikhaylov (Co-Chair of Thematic Group on Energy Efficiency of EU-Russia Energy Dialogue, Director of the Department of the State Policy, Ministry of Energy and Industry), Marc Franco (Head of European Commission Delegation in Moscow), Artur Runge-Metzger (Co-Chair of the Climate Change Sub-Group, Head of Unit Directorate General of Environment), Viktor Blinov (Co-Chair of Climate Change Sub-Group, Director, Roshydromet), Mikhail Kuznetsov (Executive Director, Russian Regional Environmental Centre (RREC))

Historical Overview

Timeline EU-Russia Energy Dialogue

A Sub-Group on Infrastructure established under the Thematic Group on Market Developments

Signature of an "Early Warning Mechanism" to ensure rapid communication and to prevent further supply interruptions in the field of gas, oil or electricity



Sergey Shmatko
Minister for Energy
Russian Federation



Paul Magnette
Minister for Climate
and Energy
Kingdom of Belgium



Günther H. Oettinger
Commissioner for Energy
European Commission



4th Meeting of the EU-Russia Permanent Partnership Council on Energy



5th Meeting of the EU-Russia Permanent Partnership Council on Energy



Signature of the 10th anniversary report of the EU-Russia Energy Dialogue

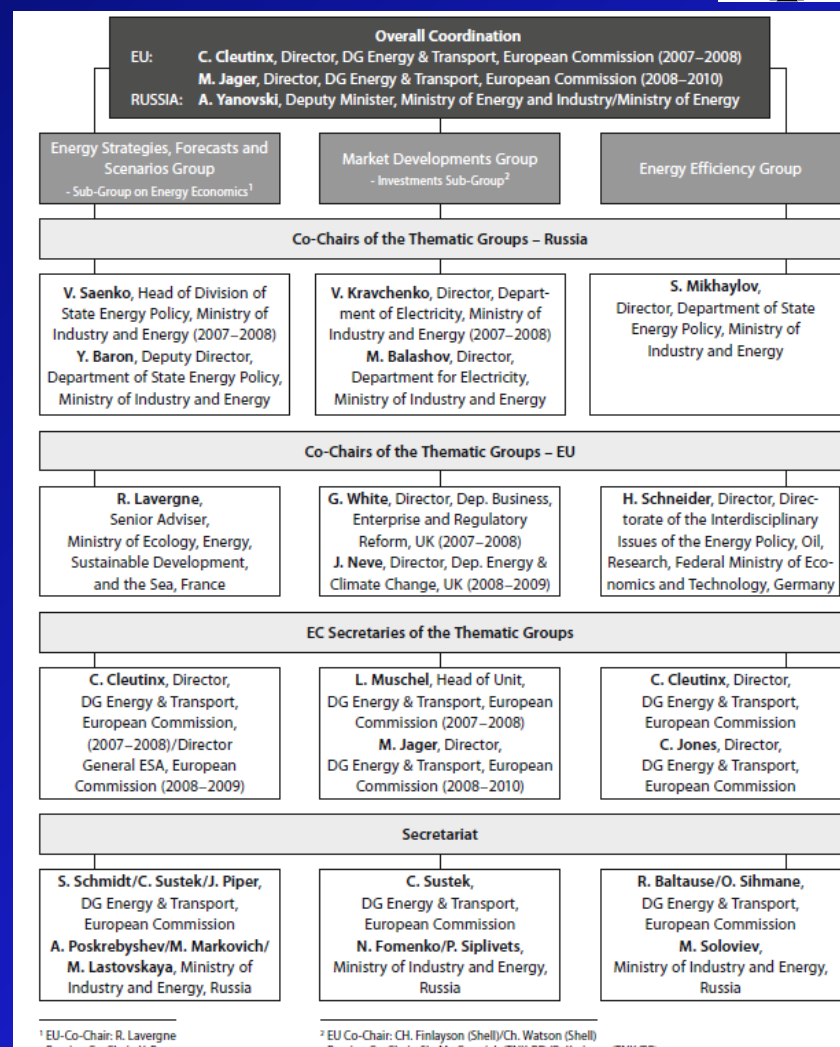
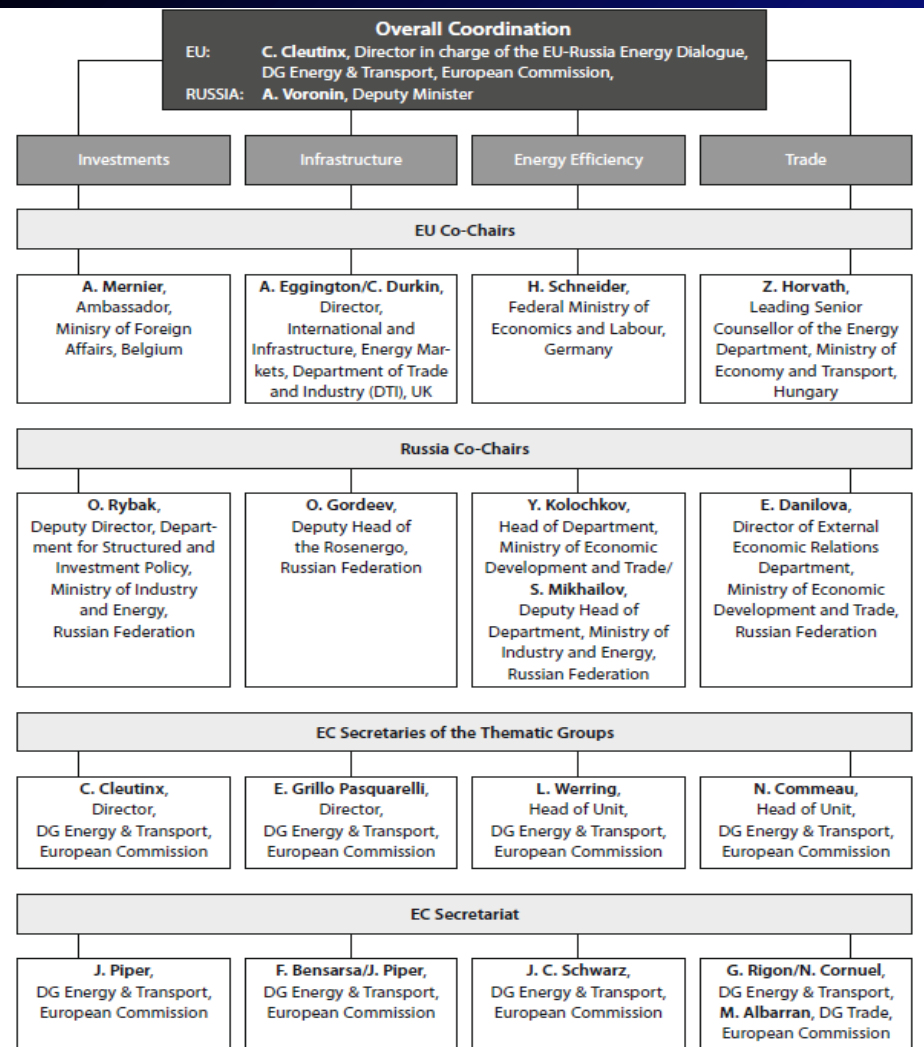


Russian Minister of Energy Sergey Shmatko and the European Commissioner for Energy Günther H. Oettinger

Source:



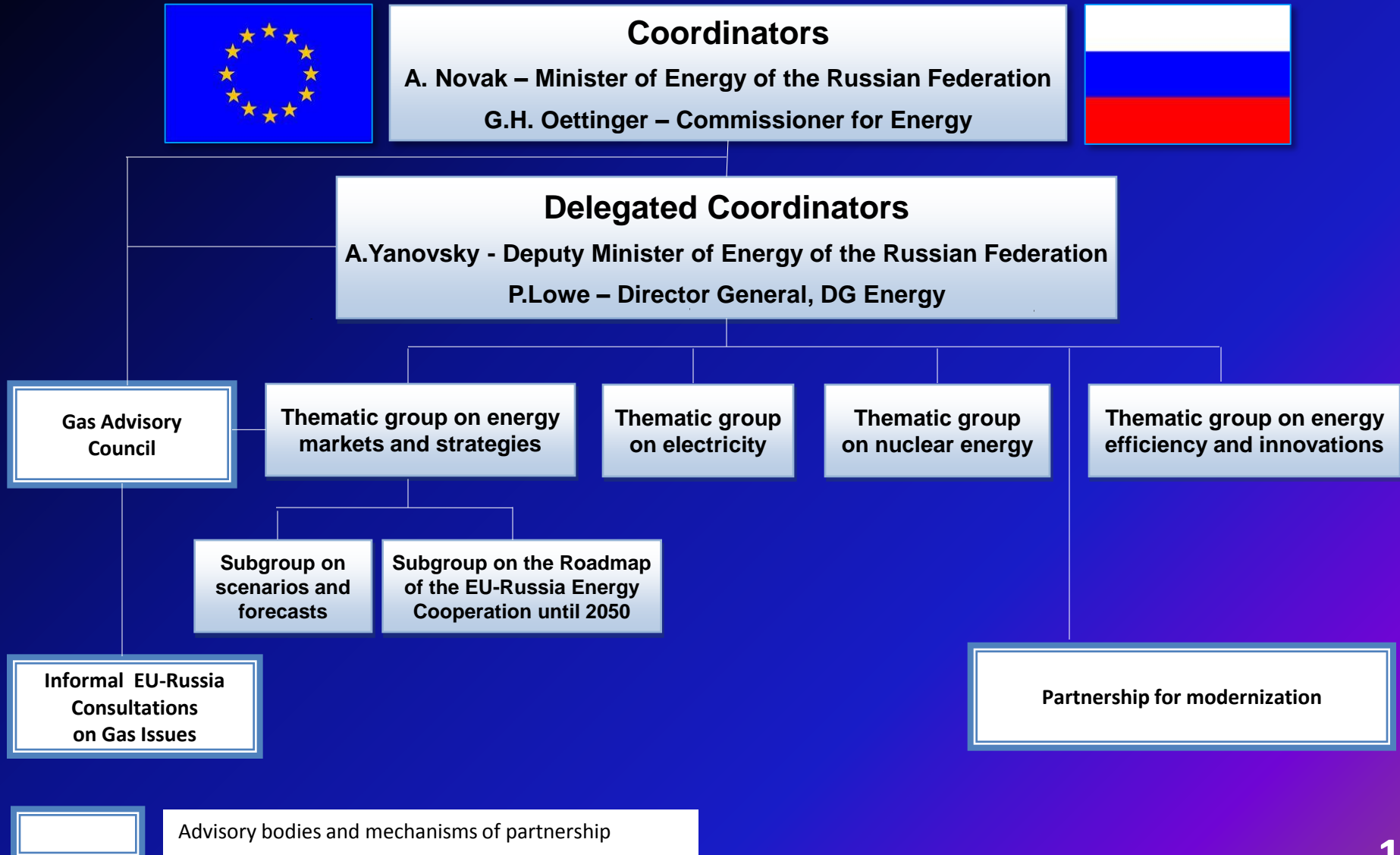
Structure of the EU-Russia Thematic Groups of the Energy Dialogue in 2004 – 2006 and 2007 – 2009



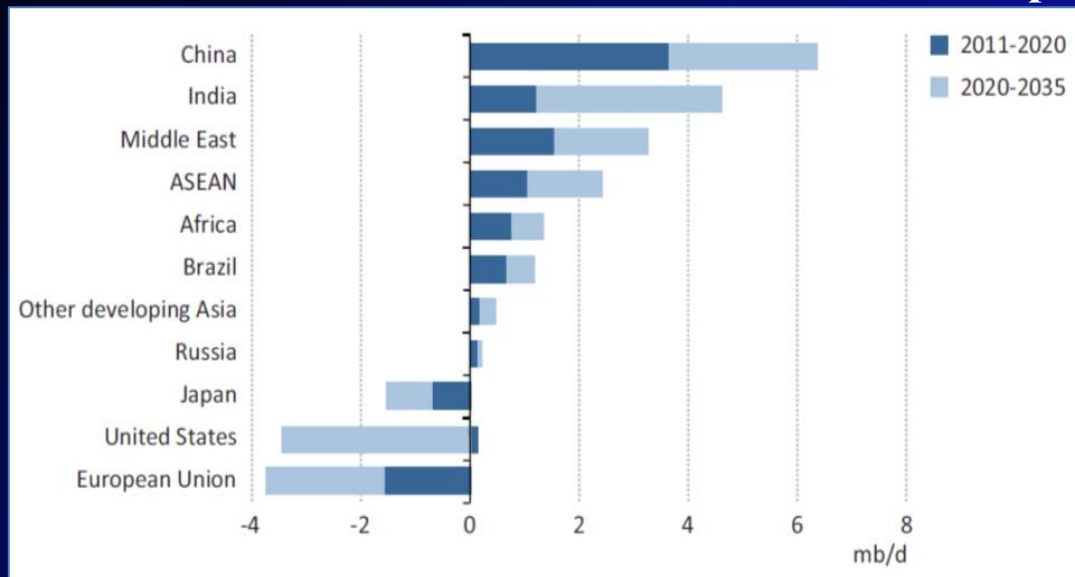
¹ EU Co-Chair: R. Laverne
 Russian Co-Chair: Y. Baron

² EU Co-Chair: CH. Finlayson (Shell)/Ch. Watson (Shell)
 Russian Co-Chair: Sh. Mc Cormick (TNK-BP)/O. Karimov (TNK/BP)

Structure of the EU-Russia Energy Dialogue



МЭА – Сценарий Новых политик: изменения спроса на нефть в отдельных странах

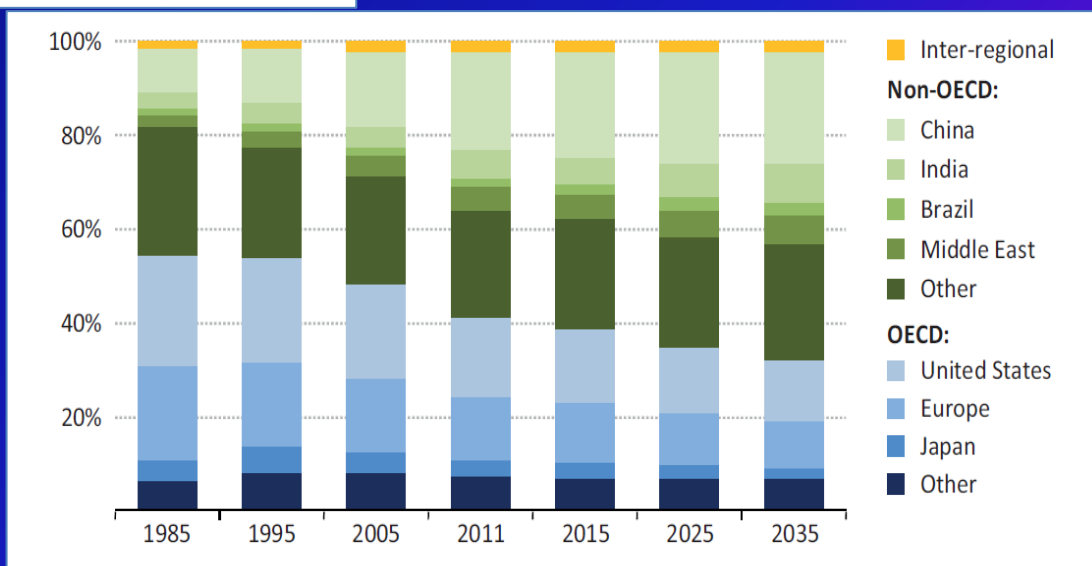


Change in oil demand in selected regions in the New Policies Scenario

Share of world primary energy demand by region

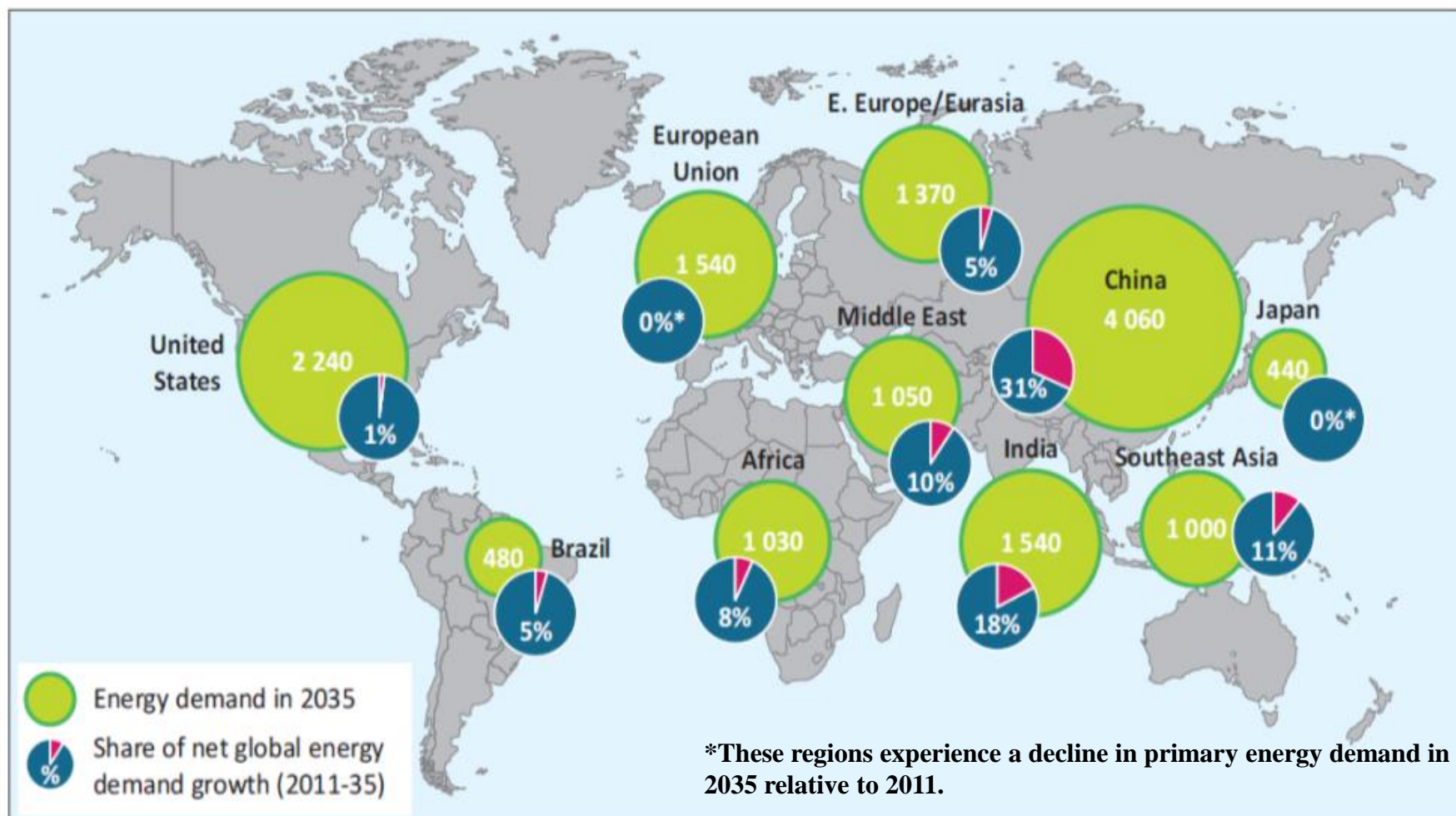
**Доля отдельных регионов
в мировом энергопотреблении**

Source: WEO - 2013



Спрос на первичные энергоресурсы в отдельных регионах мира и их доля в мировом энергопотреблении (Сценарий Новых политик МЭА), млн. т н.э.

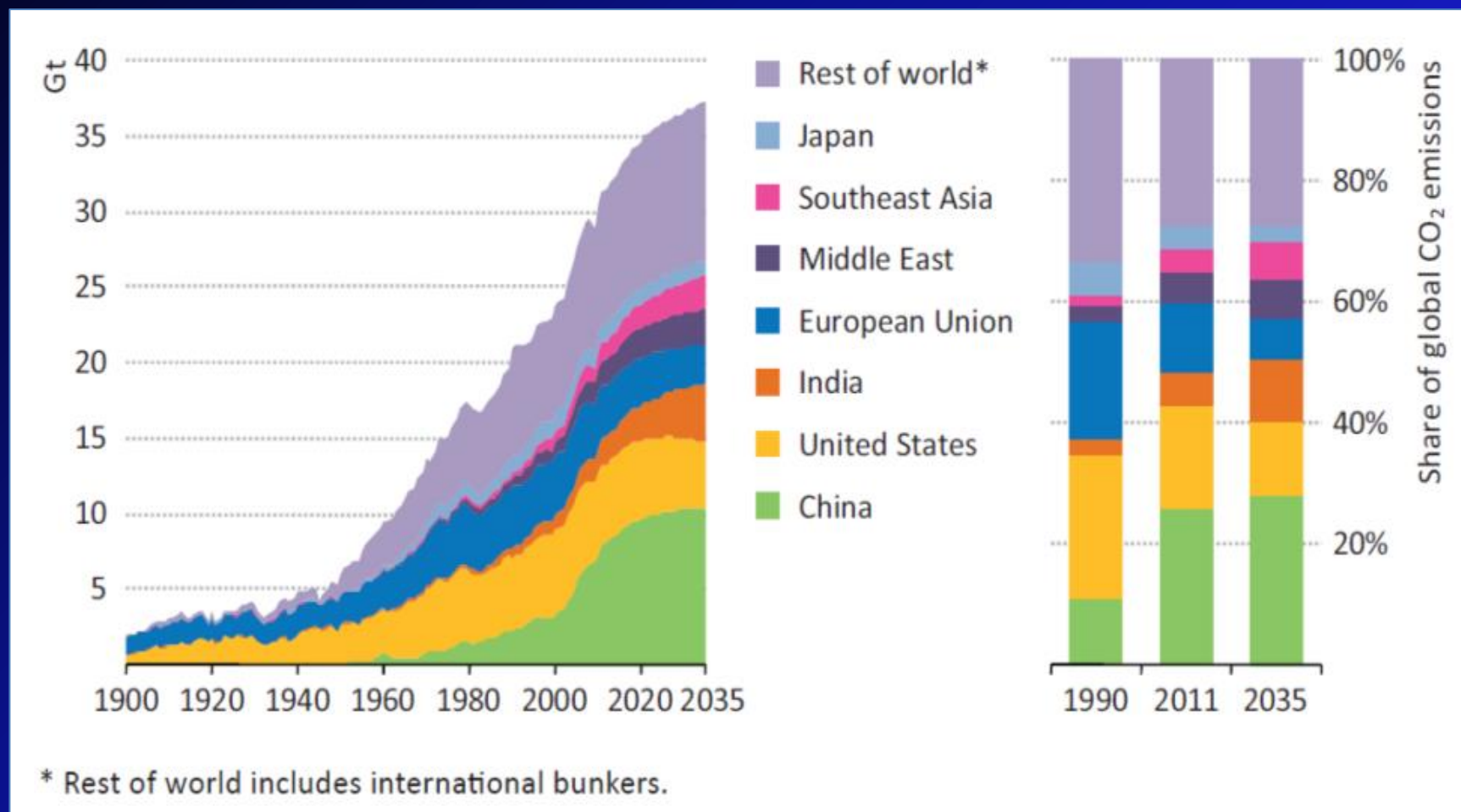
Primary energy demand in selected regions and the share of global growth in the New Policies Scenario (Mtoe)



This map is without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

Связанные с энергопотреблением выбросы CO₂ в Сценарии Новых политик МЭА

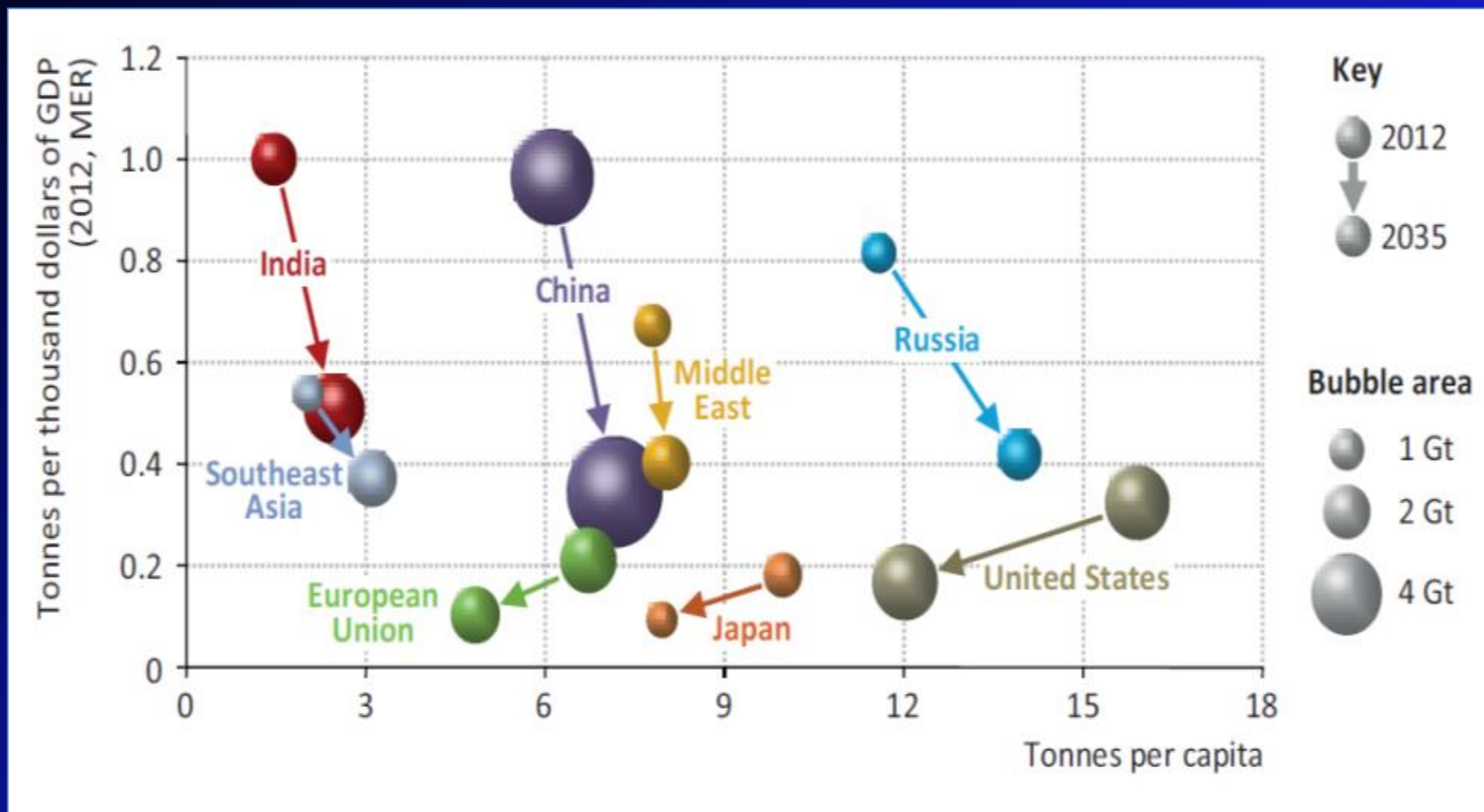
Energy-related CO₂ emissions by region in the New Policies Scenario



Source: WEO - 2013

Распределение по регионам связанных с энергопотреблением выбросов CO₂ в Сценарии Новых политик МЭА

Energy-related CO₂ emissions by region in the New Policies Scenario



Source: WEO - 2013

Дорожная карта энергетического сотрудничества: март 2013

Energy Cooperation Roadmap: March 2013





Основные принципы Дорожной карты энергетического сотрудничества



Energy Cooperation Roadmap: principles

- признание суверенности политических решений России, ЕС и стран, входящих в ЕС

Recognize the sovereign policy decisions of the Russian Federation and of the EU and its Member States

- достижение приемлемого уровня неопределённости в контексте будущего устойчивого и взаимовыгодного развития отношений России и ЕС в области энергетики

Achieve a tolerable level of uncertainty in the context of the robust and mutually advantageous future development of Russia-EU energy relations

- ориентация на перспективу и наличие рекомендаций по последовательным шагам для укрепления сотрудничества России и ЕС в области энергетики в ближайшие десятилетия

Be forward-looking and make recommendations for a series of steps to enhance Russia-EU energy cooperation over the coming decades

- отношение к Дорожной карте как к «живому» документу, рассматриваемому в качестве общей точки отсчёта в контексте энергетического диалога Россия – ЕС

Be a living document and serve as a common reference in the context of the Russia-EU Energy Dialogue



Стратегическая цель Дорожной карты Energy Cooperation Roadmap: strategic target by 2050



«Формирование к 2050 г. пан-Европейского энергетического пространства с функционирующей интегрированной сетевой инфраструктурой, с открытыми, прозрачными, эффективными и конкурентными рынками, которое будет способствовать обеспечению энергетической безопасности и достижению целей устойчивого развития России и ЕС»

*“To achieve a Pan-European Energy Space,
with a functioning integrated network infrastructure,
with open, transparent, efficient and competitive markets,
making the necessary contribution to ensuring
energy security and reaching the sustainable development goals
of Russia and the EU”.*



Применение Дорожной карты Energy Cooperation Roadmap: implementation



➤ Дорожная карта не является юридически или политически обязывающим документом, поэтому механизм её реализации должен базироваться в первую очередь на процессе регулярного мониторинга достигаемых результатов – в том числе в рамках Ежегодного обобщающего доклада о ходе ЭнергодIALOGа Россия-ЕС

Energy Cooperation Roadmap doesn't and shouldn't have status of legally or politically binding document, so the implementation mechanism is based on its continuous monitoring process, including regular presentation of the corresponding results in frame of the annual Russia-EU Energy Dialogue progress report

➤ Все тематические группы в рамках ЭнергодIALOGа должны будут учитывать рекомендации Дорожной карты в своих рабочих планах

All the Thematic Groups and Gas Advisory Council should take into account the Energy Cooperation Roadmap recommendations in their respective work programs



Проблемные области, связанные с применением Третьего энергопакета ЕС

Risks associated with the implementation of the EU's Third Energy Package provisions

Areas of concern

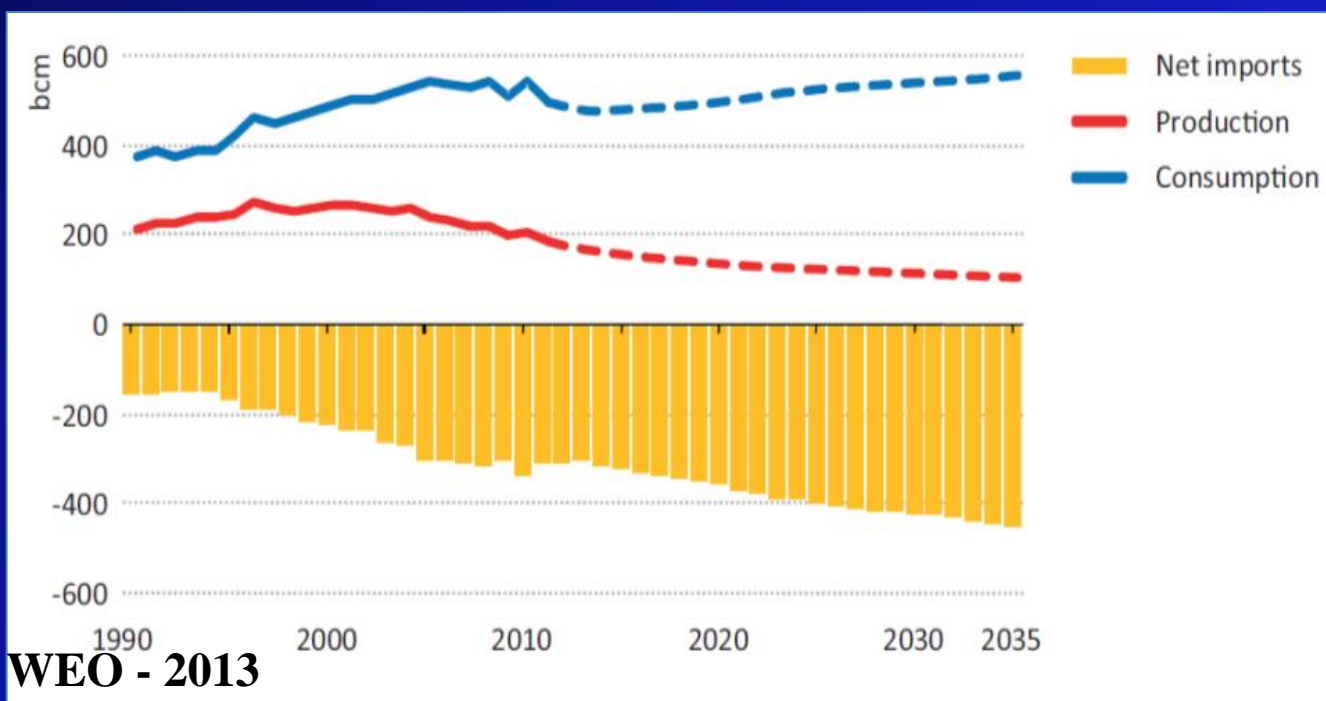
- ❑ Cross-border issues are left unregulated: import, export, transit and the corresponding structure on the EU's external borders
- ❑ No provision is made for robust mechanism to raise investments for infrastructure development
- ❑ Exemptions to be granted to new energy transportation projects : criteria are blurry and the procedure is overly bureaucratic
- ❑ Requirements set for foreign companies to be certified as transmission system operators are discriminatory

Risks arise for:

- ❑ Gas exports to EU
- ❑ Security of electricity supply
- ❑ Long-term contracts
- ❑ Large infrastructure projects
- ❑ Investment protection

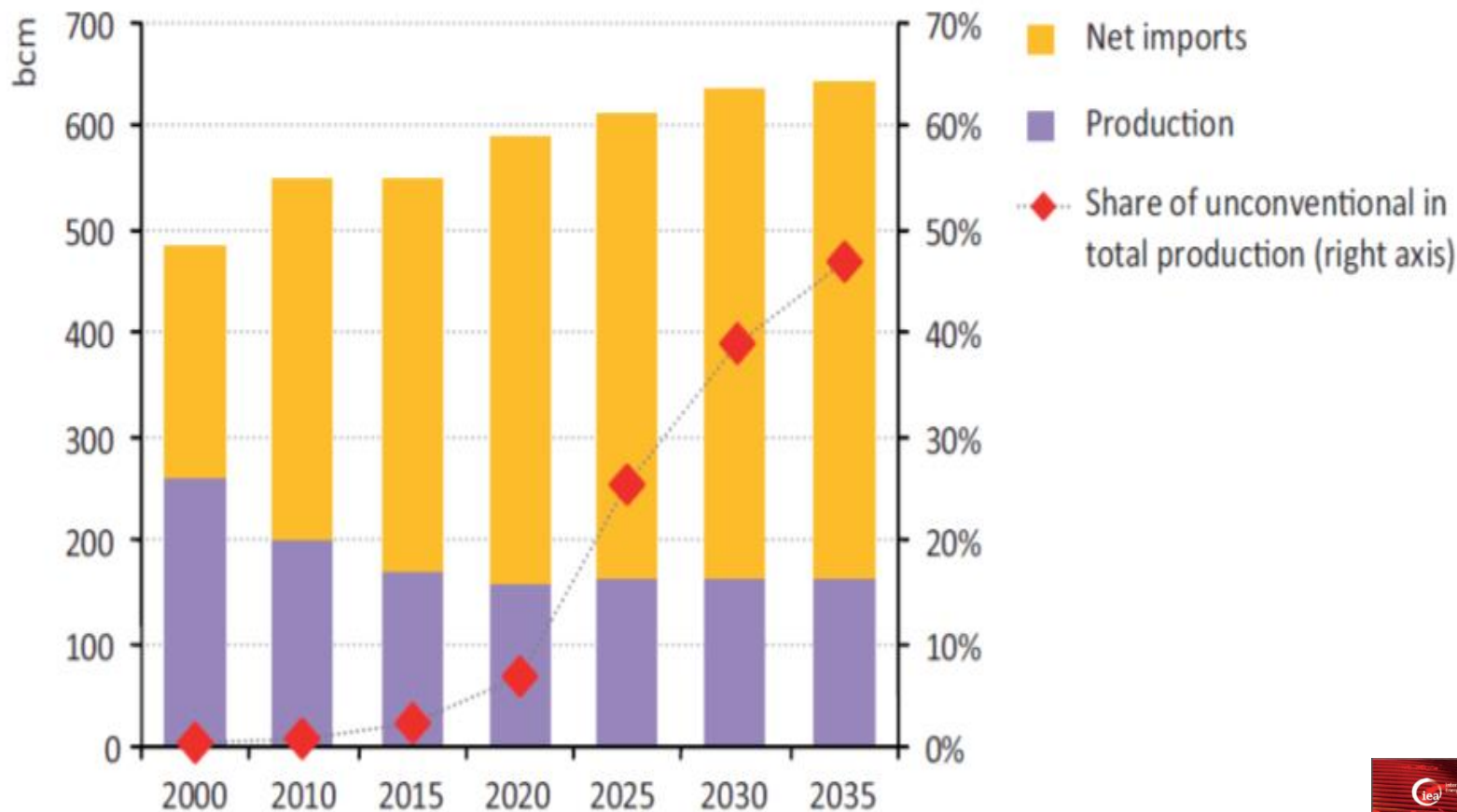
Баланс природного газа ЕС в сценарии Новых политик МЭА European Union natural gas supply and demand balance in the New Policies Scenario

	1990	2011	2020	2025	2030	2035	2011-2035	
							Delta	CAAGR*
Natural gas demand	371	492	494	523	537	554	62	0.5%
Natural gas production	213	185	135	122	114	104	-80	-2.3%
Net natural gas trade		-308	-360			-450		
Share of demand or output (%)		63%	77%			107%		



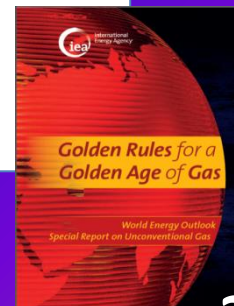
Source: WEO - 2013

Баланс газа ЕС в соответствии со Сценарием Золотых Правил МЭА Natural gas balance in the European Union in the Golden Rules Case*



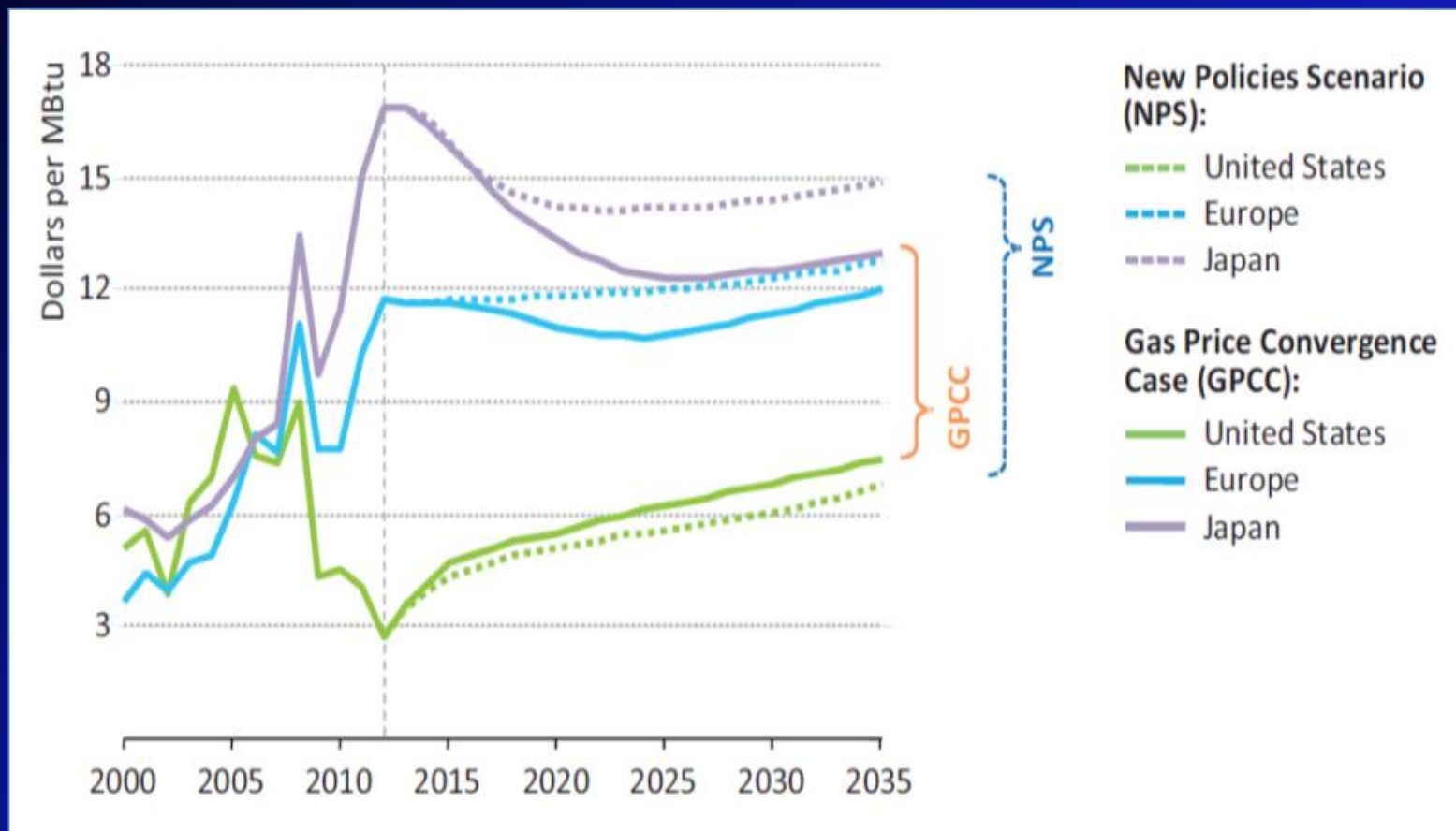
* The sum of production and net imports represents total demand.

Source:

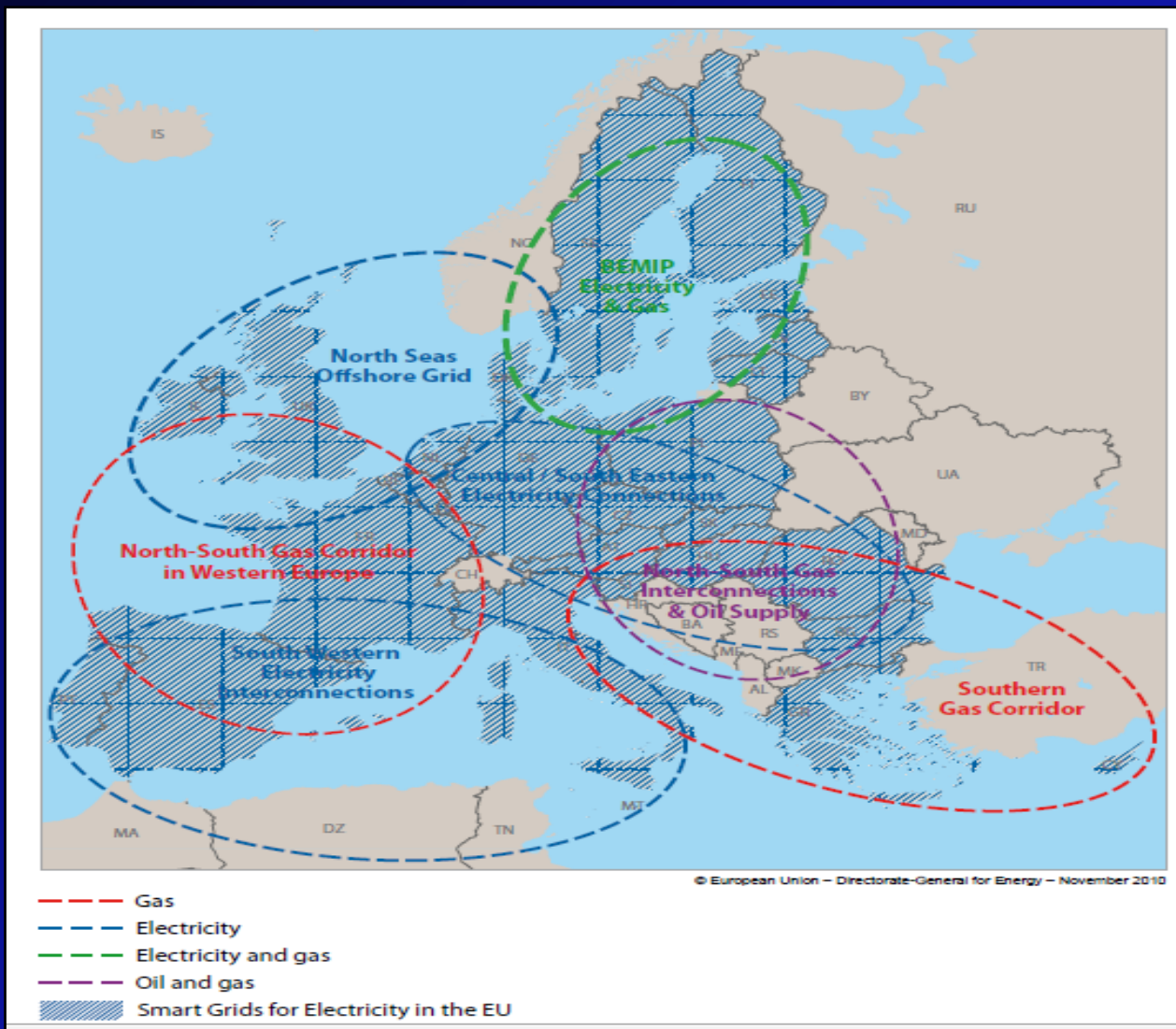


Региональные цены на газ в Сценарии Новых политик и в Сценарии их региональной конвергенции

Regional gas prices in the New Policies Scenario and in the Gas Price Convergence Case

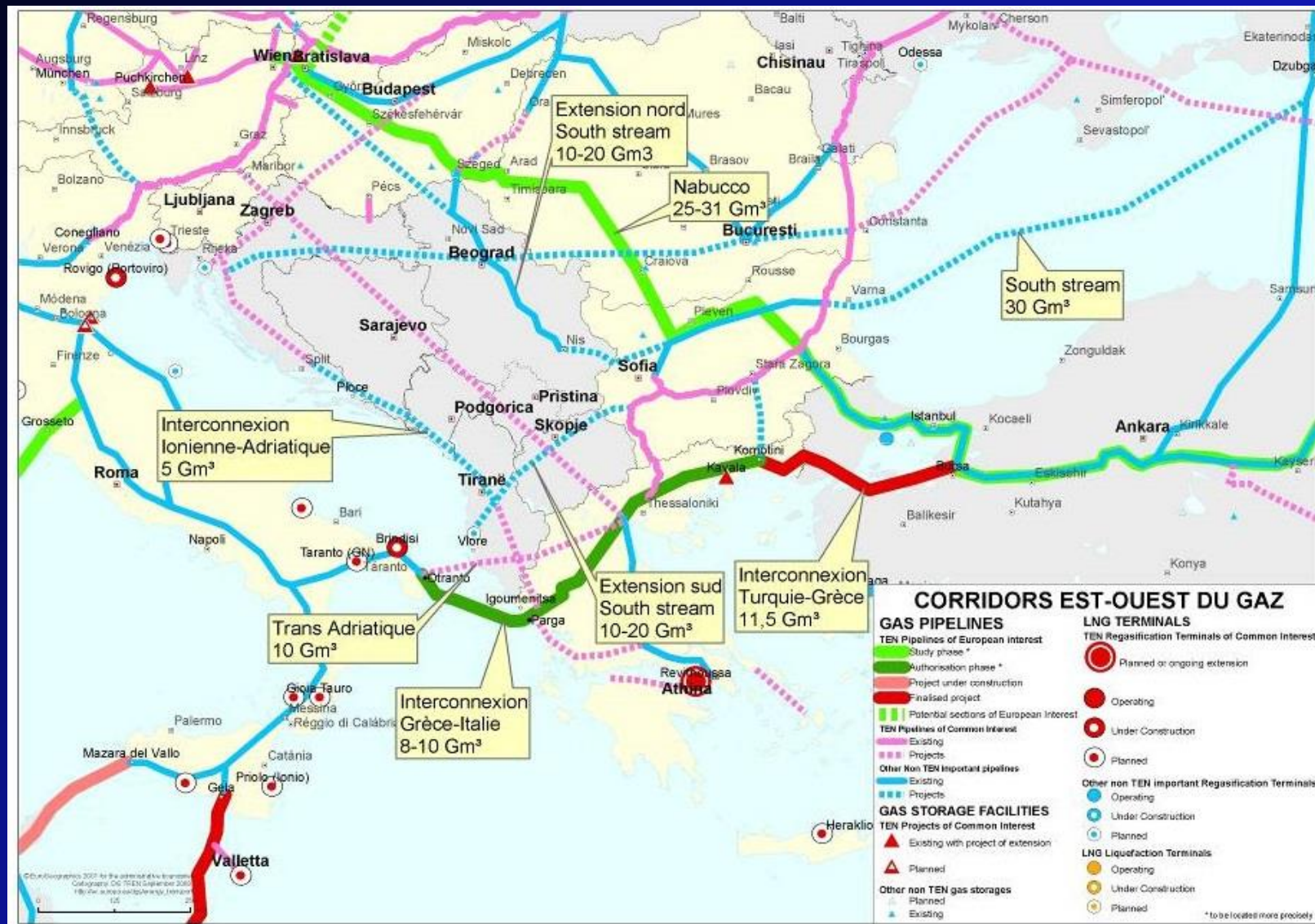


Приоритетные энергетические коридоры ЕС и районы «умных» сетей 7 corridors prioritaires



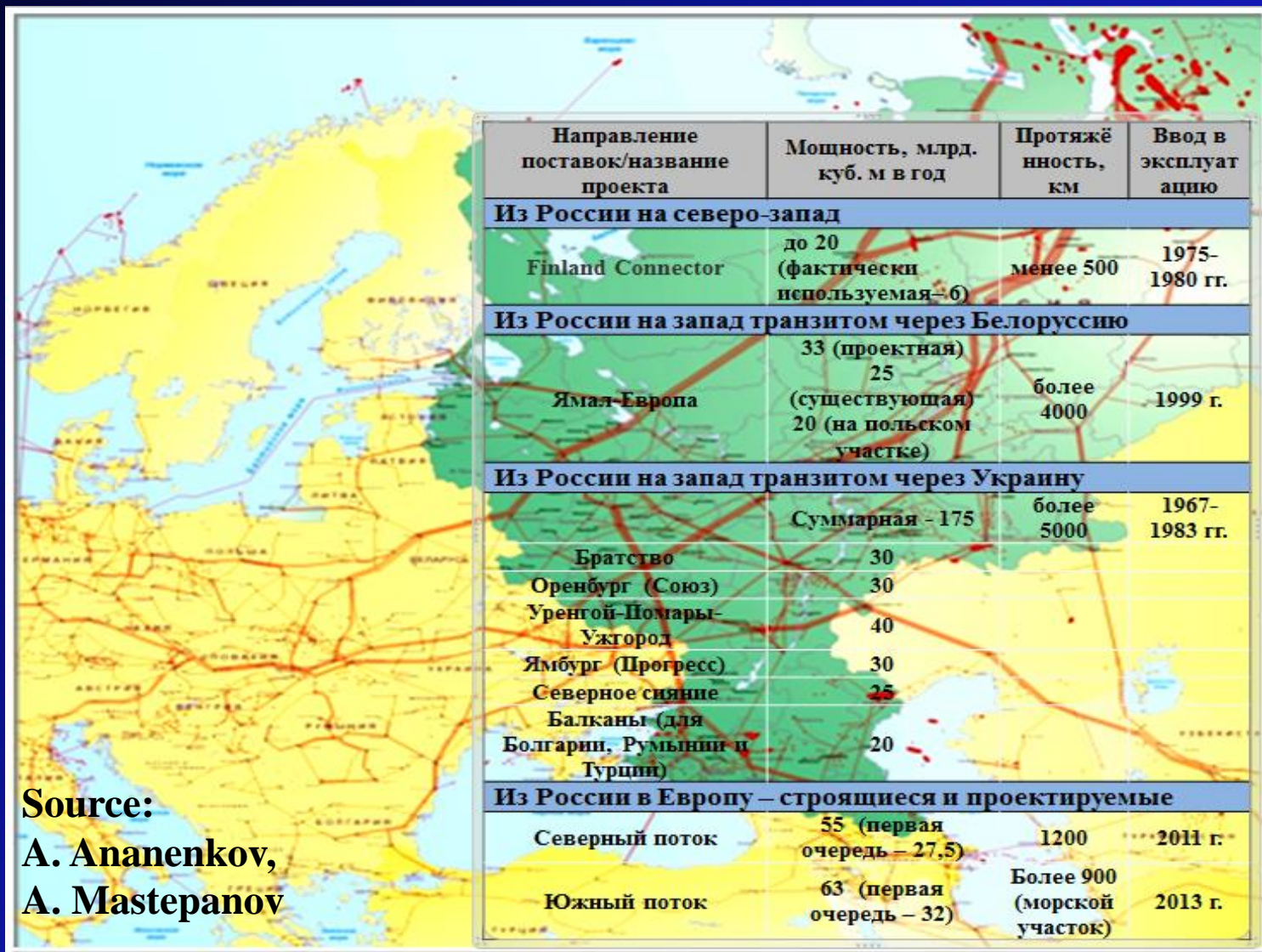
Source : COM(2010) 677 final du 17.11.2010

Южный (Южно-Европейский) газовый коридор East-West (South-European) gas corridor



Основные характеристики существующих и создаваемых (проектируемых) маршрутов экспорта российского газа в Европу

The main characteristics of existing and newly established (designed) routes for export of Russian gas to Europe



Source:

A. Ananenko,
A. Mastepanov



Лучшие страны в 2013 по показателю Устойчивой энергетики Top performing countries in the 2013 Energy Sustainability Index



Sweden

2020: 50% of total energy consumption from renewable sources and 17% GHG emission reduction from 2005

2050: Zero net GHG emissions

United Kingdom

2020: 20% GHG emission reduction from 1990 levels and 15% of total energy consumption from renewable sources

2050: 80% GHG emission reduction

Netherlands

2020: 16% GHG emission reduction from 2005 and 14% of total energy consumption from renewable sources

2050: 80–95% GHG emission reduction from 1990

France

2020: 14% GHG emission reduction from 2005 and 23% of total energy consumption from renewable sources

2050: Under development

Spain

2020: 10% GHG emission reduction from 2005

2050: None

Denmark

2020: 30% of total from renewable GHG emission
2050: Independent

Germany

2020: 14% GHG From 2005
2050: 80–95% GHG

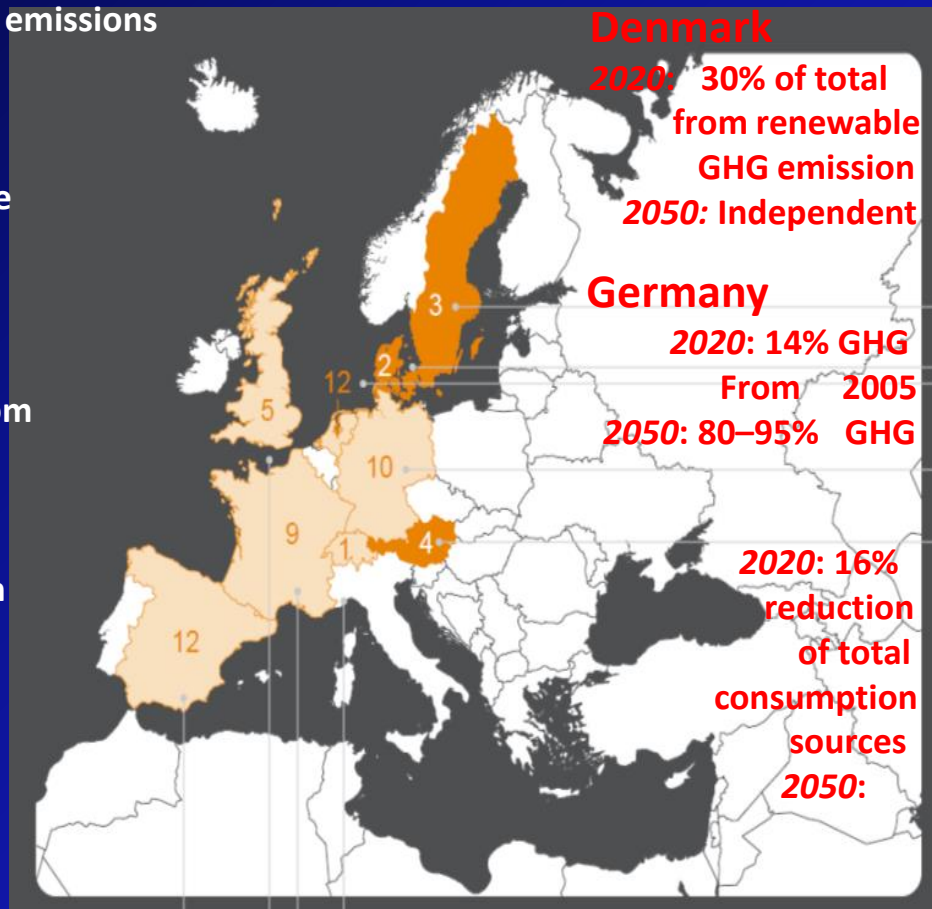
2020: 16% reduction of total consumption sources
2050:

energy consumption sources and 20% reduction from 1990 of fossil fuels

emission reduction
emission reduction

Austria

GHG emission from 2005 and 34% energy from renewable
100% self-sufficient



Switzerland

2020: 20% GHG emission reduction from 1990
2050: Under development

Numbers indicate 2013 Index rank

32



Goal of fossil fuel independence by 2050

Source: World Energy Trilemma Time to get real – the case for Sustainable energy investment. World Energy Council. 2013.



Российские инициативы Initiatives of Russia



Fundamental approaches of the Russian side	Implementation mechanisms
<ul style="list-style-type: none">● Compliance by the parties with the previously signed bilateral international agreements and acknowledgement of their supremacy over national legislation.● Defining the status of “cross-border projects” to supply gas/oil and electricity to the EU Member States.● Safeguarding the existing and new export-import power systems● Recognizing that long-term contracts are the key mechanism for natural gas supplies● Preventing unilateral changes to the existing conditions of joint operation of the power systems● Joint elaboration of uniform criteria and principles to insure reliability and stability in the operation of the power systems● Availability of mandatory arbitration mechanism to settle disputes between different parties and between a party and investors on the other side	<ul style="list-style-type: none">● Agreement between the Russian Federation and the European Union on cooperation in the implementation of infrastructure projects for natural gas exports from the Russian Federation to the European Union, including projects of mutual interest● Agreement between the Russian Federation, Republic of Belarus and the European Union on joint synchronous operation of the Unified Energy System of the Russian Federation and Republic of Belarus, and the power systems of the Republic of Latvia, Republic of Lithuania and Republic of Estonia● Cooperation between national regulators



СПАСИБО за ВНИМАНИЕ!

**Avec mes meilleurs
remerciements
pour votre attention!**

**THANK YOU FOR YOUR
ATTENTION!**