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ID	Doc Type	Document Description	No of Pages	Doc Date	Restrictions	
86525	MEMO	MARTIN TO UNDER SECRETARY BUCKLEY RE STATUS REPORT OF ENERGY ISSUES	2	5/4/1982	B1	
86620	PAPER	EUROPEAN GAS SUPPLIES	3	ND	B1	
86622	CHART	ITALY SUPPLIES	1	ND	B1	
86623	PAPER	FRANCE GAS SUPPLIES	3	ND	B1	
86625	PAPER	W GERMANY GAS SUPPLIES	3	ND	B1	
86626	MEMO	BRYEN/MARTIN TO DAVIS, ET AL RE CHATHAM HOUSE MEETING ON EUROPEAN GAS SECURITY	3	5/12/1982	B1	B3
86628	PAPER	SUMMARY OF CHATHAM HOUSE MEETING	5	ND	B1	B3

The above documents were not referred for declassification review at time of processing

Freedom of Information Act - [5 U.S.C. 552(b)]

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B-2 Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
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86620	PAPER EUROPEAN GAS SUPPLIES	3	ND	B1

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Additional Gas Supplies for Italy

- Netherlands. Deliveries of gas under existing Dutch export contracts can probably be stretched beyond 1995 by deferring deliveries from earlier years in which contracted supplies may exceed demand. In any event, a relaxation of Dutch restrictions on gas exports might allow new contracts to be signed for 2-3 bcm per year.

- LNG. Italy had an agreement to receive 1.4 of the 8 bcm/yr originally destined for Europe from Nigeria's Bonny LNG project. While this project as originally envisioned is now dead, the IEA Secretariat still believes that an 8 bcm/yr project is likely to go ahead. This and other possible LNG projects (from Cameroon, Qatar, Egypt, or Northern Norway) would require additional receiving facilities--even if the La Spezia facilities are no longer used for Libyan exports.

  Recent gas discoveries by ENI have supported optimism about Egypt's gas potential. A senior vice-president of ENI has indicated that substantial new reserves are likely to be added in the 1980s, making Egypt a possible exporter of LNG in the 1990s.

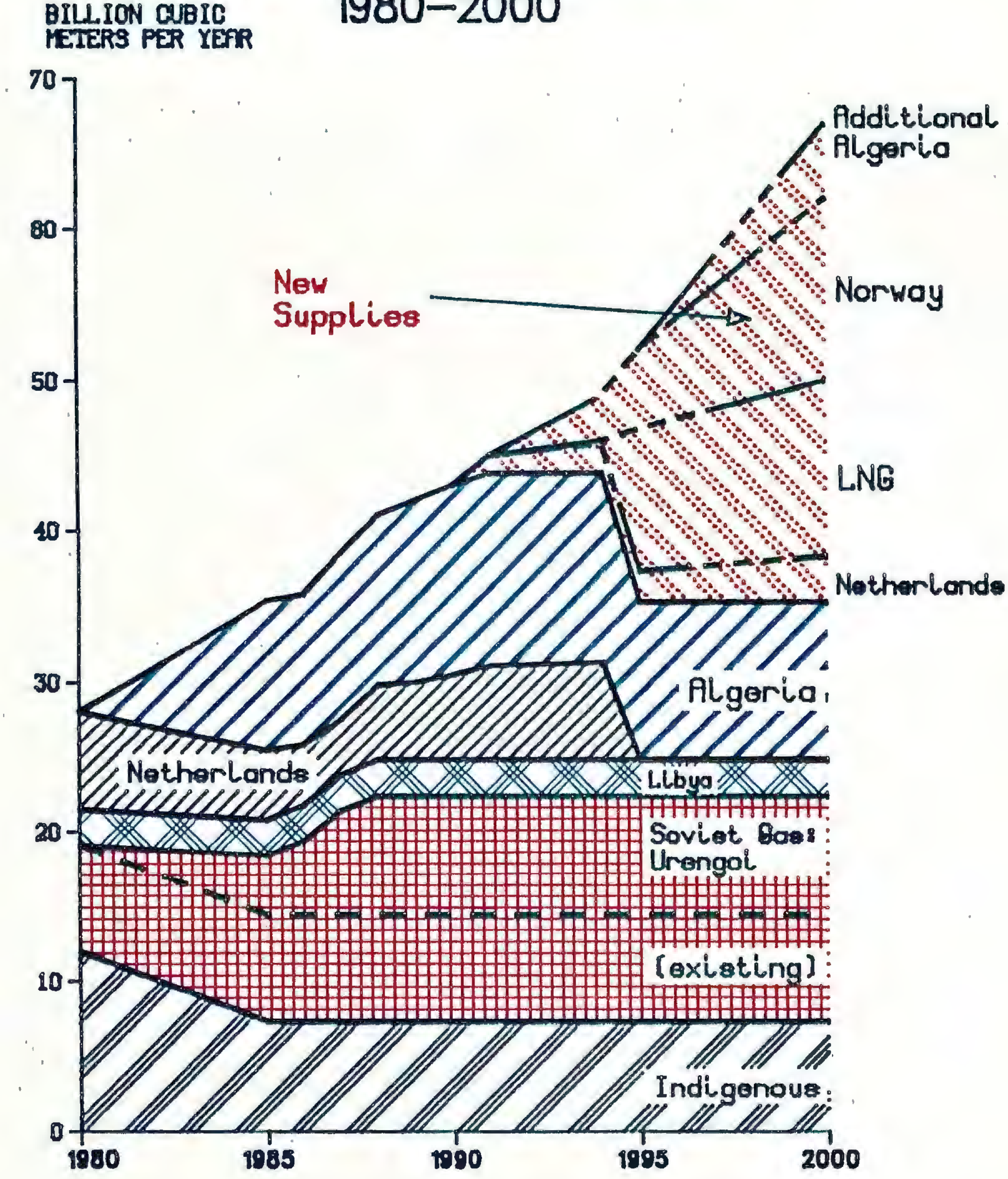
  A Qatar LNG facility, which would export about 8 bcm/yr, could be completed as early as the late 1980s, although a mid-1990s date seems more likely. Development of this project has received more emphasis because of declines in revenue brought about by declining oil production and lower oil prices.

  Although sufficient reserves still need to be proved, industry sources are optimistic that a LNG project of 5 bcm/yr is possible for Cameroon.

- Norway. Within the OECD, Norway emerged as the largest potential exporter after 1990. Reserves are immense, but long lead times to develop fields and transportation systems are likely to prohibit significant additional Norwegian supplies to the Continent before the early 1990s. By the end of the century, the Norwegians could more than double their present exports and contribute at least as much as the proposed Siberian Pipeline. Lead times for some fields might be significantly reduced if the Norwegians could use the UK as a conduit for shipping supplies to the Continent. If Italy begins negotiations soon, it could conceivably contract for 5 to 10 bcm/yr of gas from Norway which could arrive as soon as the mid-1990s.

- Algeria Although Italy originally planned to use the possibility for an additional 5-6 bcm/yr through the Trans-Mediterranean Pipeline to supply other European consumers, this prospect is less likely due to German and French agreements on Soviet deliveries. Thus, assuming a new contract is arranged with Algeria, the additional volumes would equate to about 70 percent of what Italy plans to receive from the Siberian Pipeline. However, pricing issues must be resolved on the 12 bcm under the present contract with Algeria before additional quantities are contemplated.

Italy: Natural Gas Supply and Demand Forecast 1980–2000



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86622	CHART ITALY SUPPLIES	1	ND	B1

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86623	PAPER FRANCE GAS SUPPLIES	3	ND	B1

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86625	PAPER W GERMANY GAS SUPPLIES	3	ND	B1

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86626	MEMO BRYEN/MARTIN TO DAVIS, ET AL RE CHATHAM HOUSE MEETING ON EUROPEAN GAS SECURITY	3	5/12/1982	B1 B3

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ID	*Document Type* *Document Description*	*No of pages*	*Doc Date*	*Restrictions*
86628	PAPER SUMMARY OF CHATHAM HOUSE MEETING	5	ND	B1 B3

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TAB A

2A

BRITISH INSTITUTES' JOINT ENERGY POLICY PROGRAMME

Programme Office: 10 St James's Square, London SW1Y 4LE Telephone 01-930 2233

SECURITY OF EUROPEAN GAS SUPPLIES

Agenda

Introduction - The Security Issues - Jonathan Stern.

European Reserves - Norway. U.K. Netherlands. France. Germany.

Demand - Forecasts. Share of energy imports.

Dependence and Vulnerability - Germany. France. Italy. U.K. IEA. EEC.

Imports - Present and planned. Netherlands. Norway. Algeria. Soviet Union.

Supplementary Sources - LNG. Soviet Union. Norway. Substitutes. Storage. Shut-in capacity. Improving the grid.

6th May 1982

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BRITISH INSTITUTES' JOINT ENERGY POLICY PROGRAMME

Programme Office: 10 St James's Square, London SW1Y 4LE Telephone 01-930 2233

SECURITY OF EUROPEAN GAS SUPPLIES

Thursday 6th May 1982

<u>Participants</u>

Dr Henrik Ager-Hanssen	Statoil
Robert Belgrave	Joint Energy Policy Programme
Colin Brant	Foreign & Commonwealth Office
Steve Bryen	US Department of Defence
Michael Clegg	British Petroleum
Dr Wilfried Czerniejewicz	Ruhrgas Aktiengesellschaft
Richard Greenwood	EEC Directorate-General for Energy
Jacques Hartmann	Elf Aquitaine
Frank Holloway	British Steel Corporation
Wallace J. Hopkins	International Energy Agency
P.D. Irwin	Mobil North Sea Ltd.
Clive Jones	Department of Energy
William Martin	US Department of State
Harley McCamish	Bechtel Great Britain Ltd.
T.W. Oerlemans	Shell International
James Peery	Esso Europe Inc.
Dr Rafaelo Santoro	Ente Nazionale Idrocarburi
Jonathan P. Stern	Conant & Associates
Louis Turner	Joint Energy Policy Programme
Nicholas Wakefield	S.G. Warburg & Co. Ltd.
Ken S. Williams	British Gas Corporation

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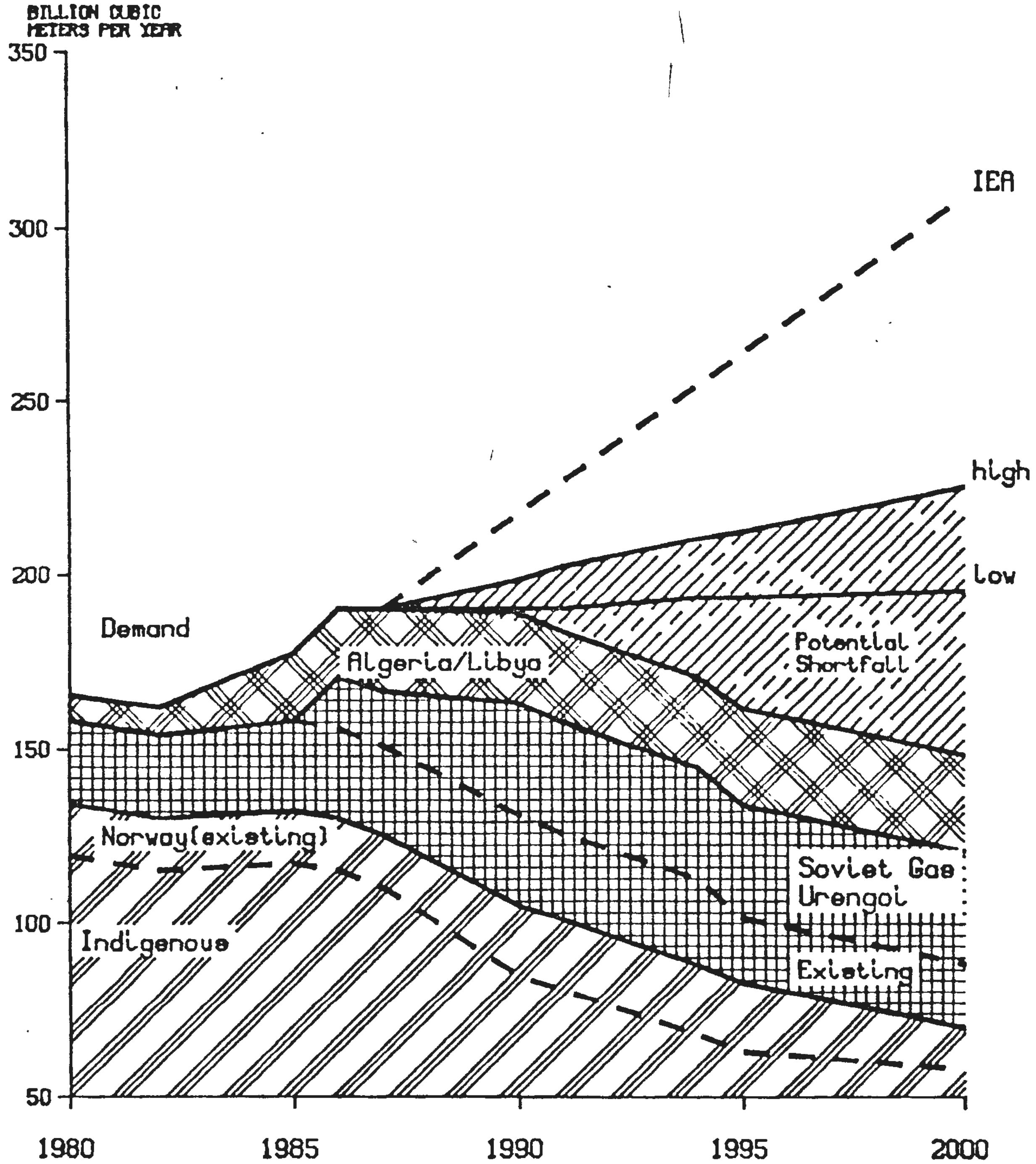
TAB B

26

Continental Europe: Natural Gas Supply and Demand Forecast 1980–2000



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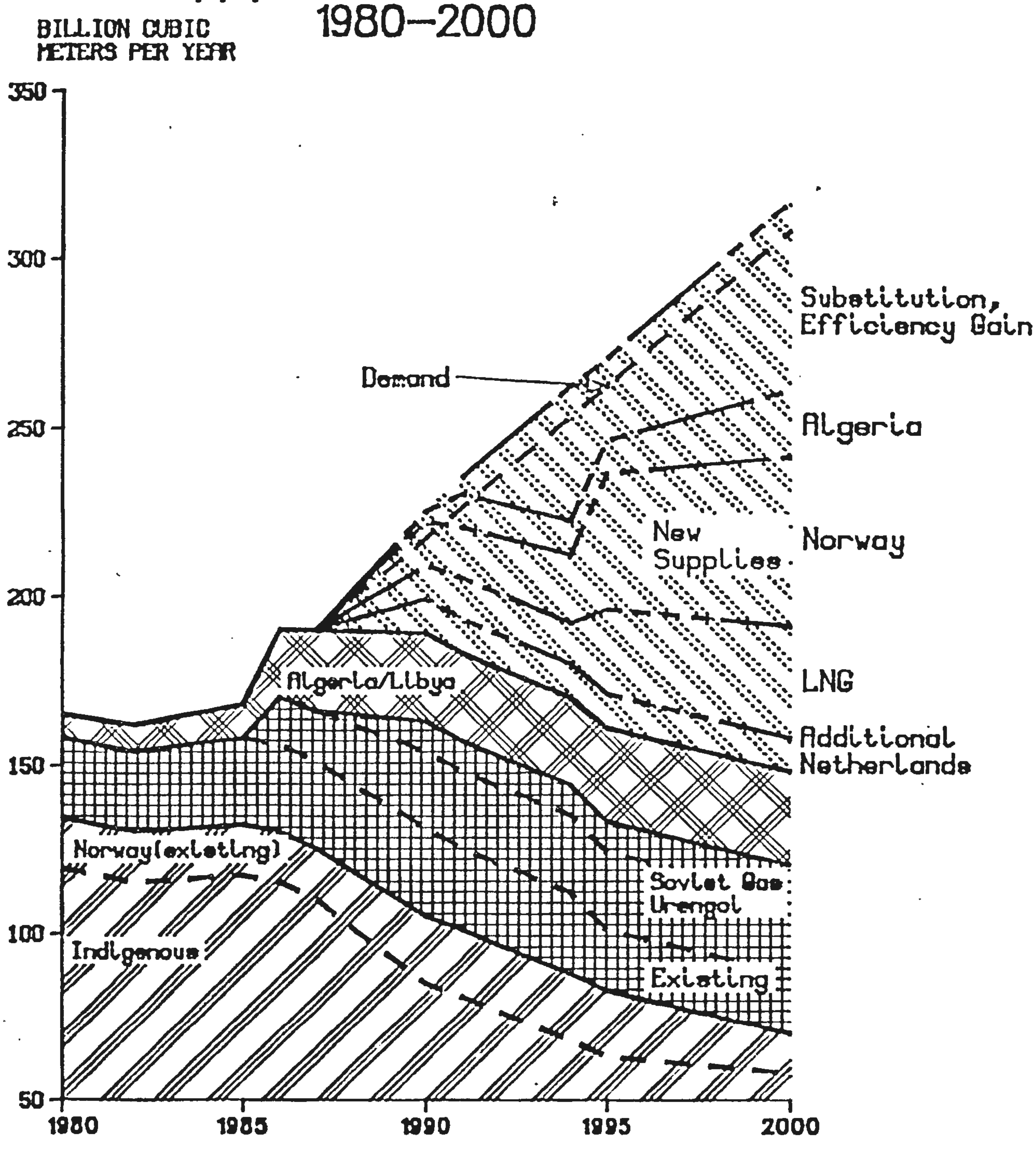

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ANNEX I

TAB C

NATURAL GAZ BALANCE FOR MAJOR NET IMPORTING EUROPEAN COUNTRIES ; YEARS 1980 AND 1990

(billion cubic meters)
(includes latest Soviet contracts)

	BELGIUM		FRANCE		GERMANY		ITALY		SPAIN		TOTAL		UNITED KINGDOM	
	1980	1990	1980	1990	1980	1990	1980	1990	1980	1990	1980	1990	1980	1990
Consumption	8,9	15,0	26,3	34,0 39,0	52,2	60,0 70,0	25,6	40,0 45,0	2,0	8,0	115,0	157,0 177,0	46,6	55,0 65,0
Domestic production (a)	-	-	7,5	2,5	18,9	16,5	11,9	7,3	-	3,0	38,3	29,3	36,6	44,0
Imports (b)*														
- Norway														
. Frigg	-	-	-	-	-	-	-	-	-	-	-	-	9,3	9,3
. Ekofisk Eldfisk	1,9	1,0	2,3	1,3	7,9	3,5	-	-	-	-	12,1	5,8	-	-
. Heimdal Statfjord	-	0,5	-	2,2	-	3,4	-	-	-	-	-	6,1	-	-
- Netherlands**	7,0	6,5	10,0	3,5	18,8	18,0	6,0	5,6	-	-	41,8	33,6	-	-
- Algeria	-	5,0	2,0	9,0	-	-	-	12,0	1,2	2,0	3,2	28,0	0,7	0,7
- Libya	-	-	-	-	-	-	1,3	-	0,8	1,0	2,1	1,0	-	-
- USSR	-	2,0	3,5	12,0	8,1	18,0	6,4	10,0	-	2,0	18,0	44,0	-	-
- Germany	-	-	1,0	-	(1,5)	-	-	-	-	-	(0,5)	-	-	-
TOTAL (a) + (b)	8,9	15,0	26,3	30,5	52,2	59,4	25,6	34,9	2,0	8,0	115,0	147,8	46,6	54,0
DIFFERENCE	-	-	-	3,5 8,5	-	0,6 10,6	-	6,1 11,1	-	-	-	9,2 29,2	-	1,0 11,0

* Contracted or under negociation

1000 Cu m gas # 0,9 TOE