

Im Leitungsgraben

Produzenten, Transitländer und externe Machtprojektion im Öl- und Gassektor

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Primary Energy: Consumption by Fuel Type

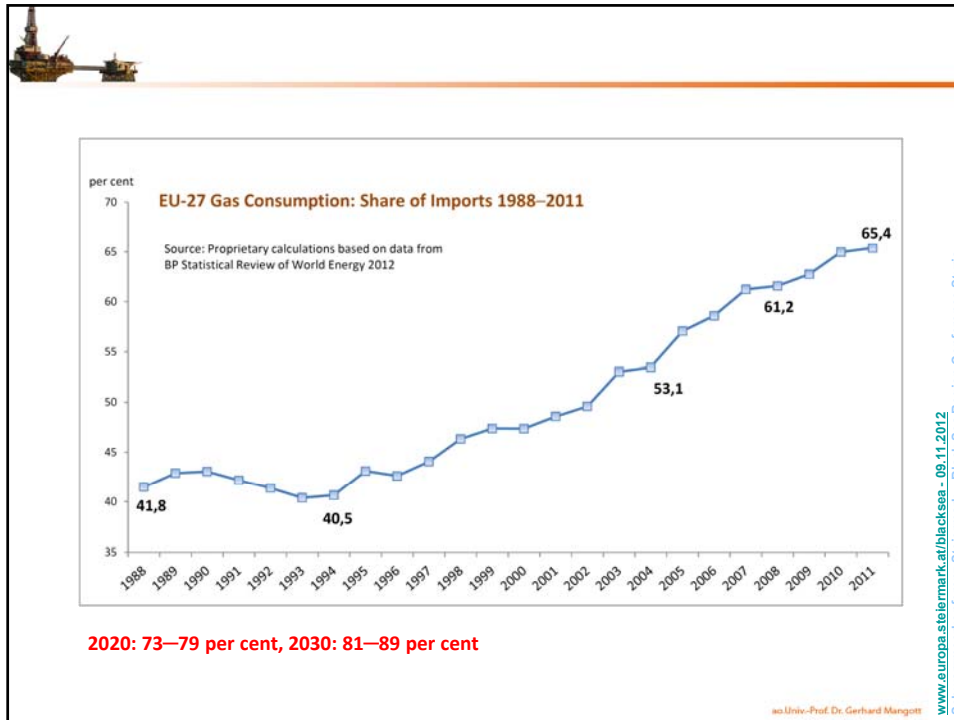
2011 (per cent)

	Oil	Gas	Coal	Nuclear	Hydroelectric	Renewables	Total
USA	36.7	27.6	22.1	8.3	3.3	2.0	100.0
Russia	19.8	55.7	13.3	5.7	5.4	0.0	100.0
Ukraine	10.2	38.2	33.5	16.1	1.9	0.0	100.0
China	18.2	4.6	69.9	0.7	5.9	0.7	100.0
India	29.0	9.8	52.9	1.3	5.3	1.7	100.0
Taiwan	38.9	12.7	37.9	8.6	0.8	1.1	100.0
Japan	42.2	19.9	24.6	7.7	4.0	1.6	100.0
Austria	39.1	26.6	7.8	0.0	21.6	5.0	100.0
EU-27	38.2	23.8	16.9	12.1	4.1	4.8	100.0
OECD	37.9	25.1	19.9	8.8	5.7	2.7	100.0
Global	33.1	23.7	30.3	4.9	6.5	1.6	100.0

Source: Proprietary Calculations, BP Statistical Review of World Energy 2012

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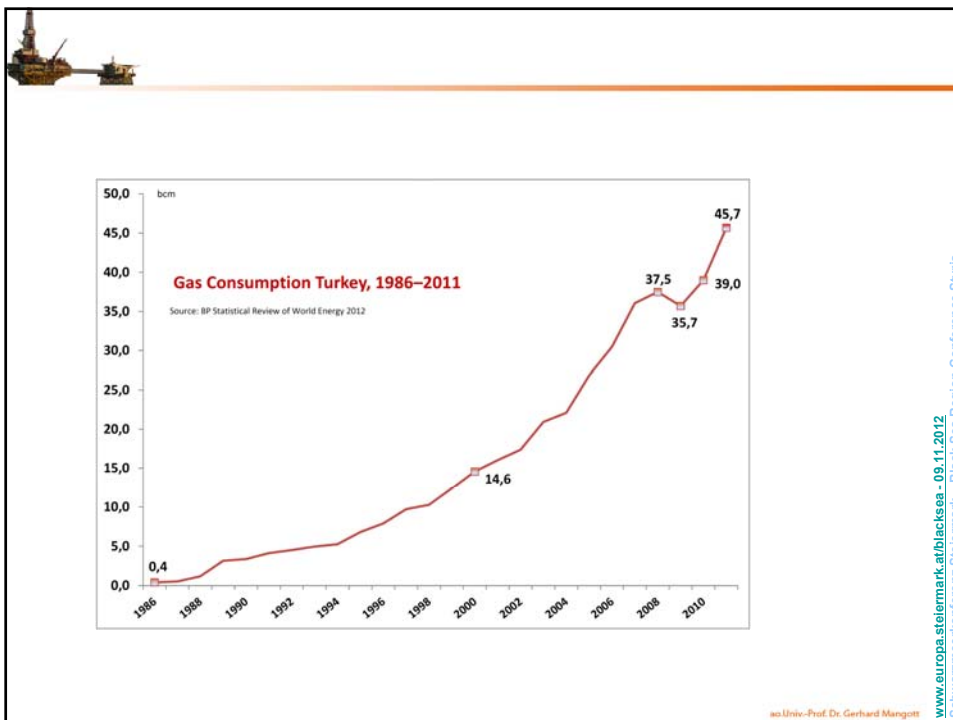
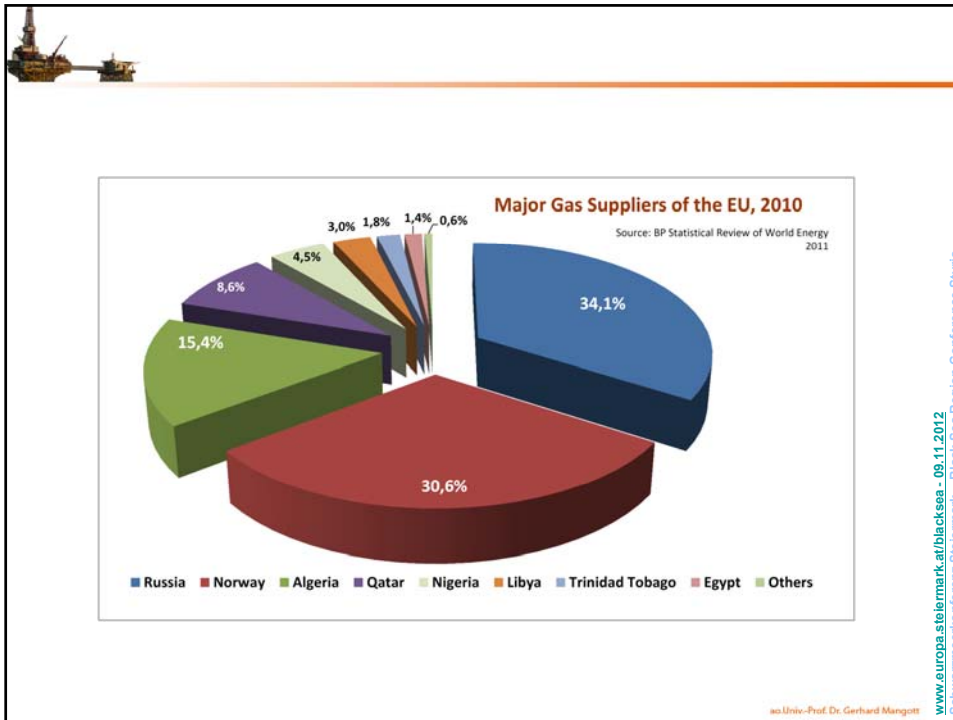


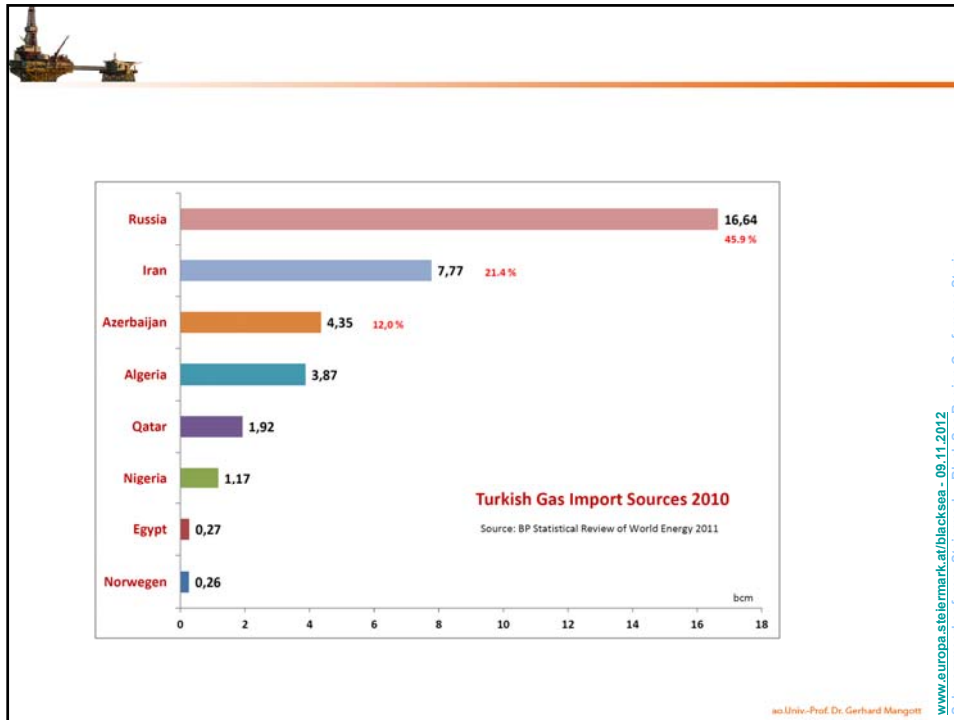
The **International Energy Agency (IEA)** expects **total gas consumption in the EU in 2035 of 629 bcm/y**. Total indigenous gas **production in the EU will plummet to 89 bcm/y in 2035**.

This means that **about 540 bcm/y will have to be imported**, which is about 220 bcm more than total imports in 2010 (320,7 bcm/y), an **increase of 68.4 per cent**.

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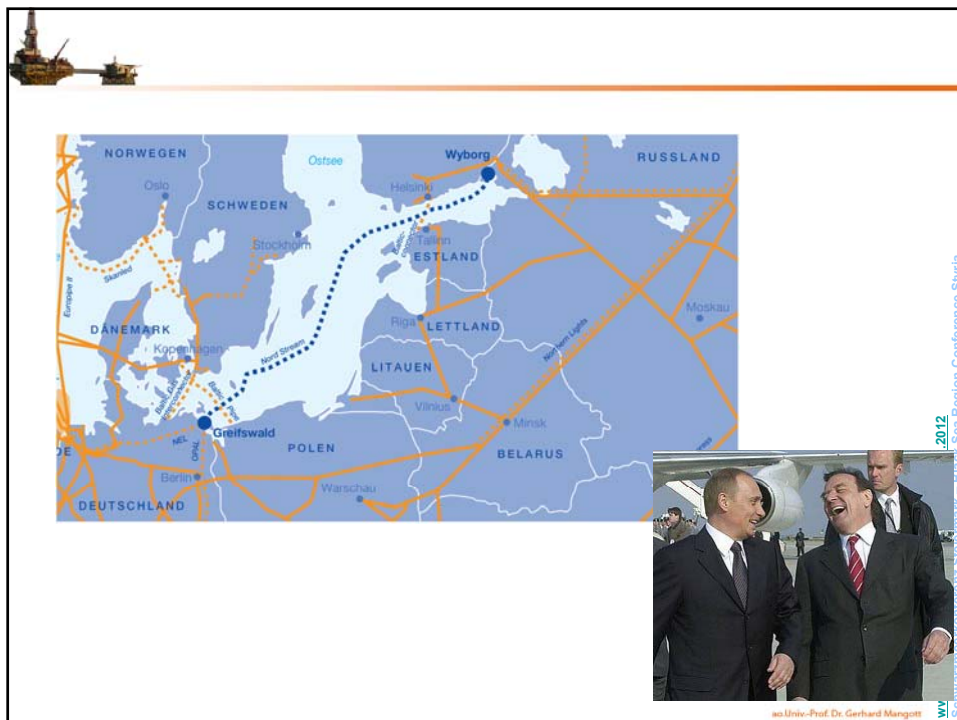
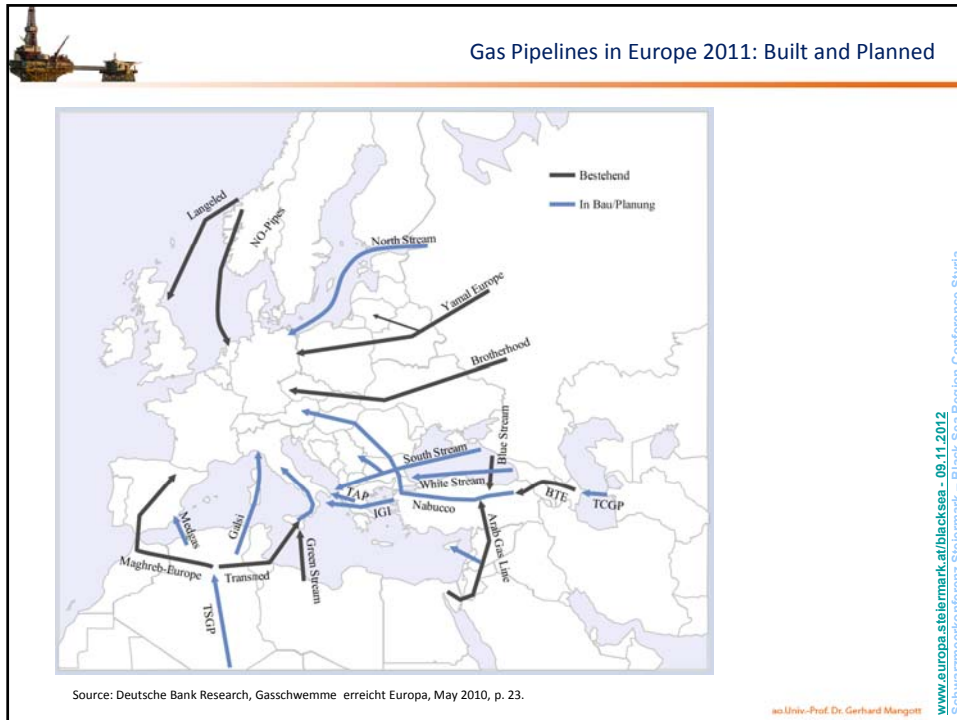
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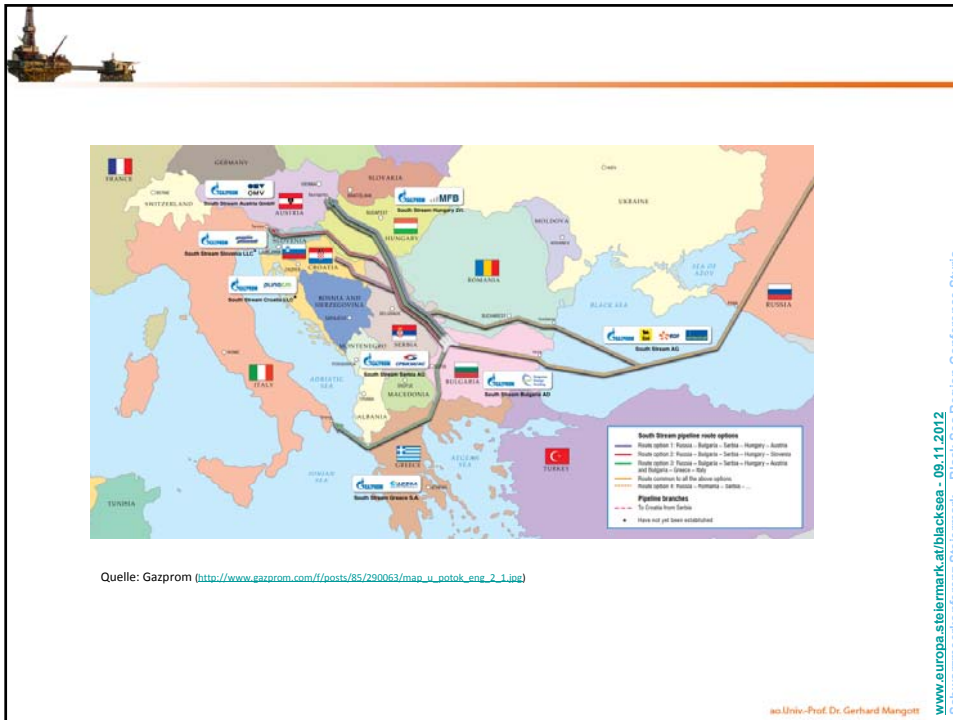
Konfliktorische Bruchlinien Gazprom – Europäische Union

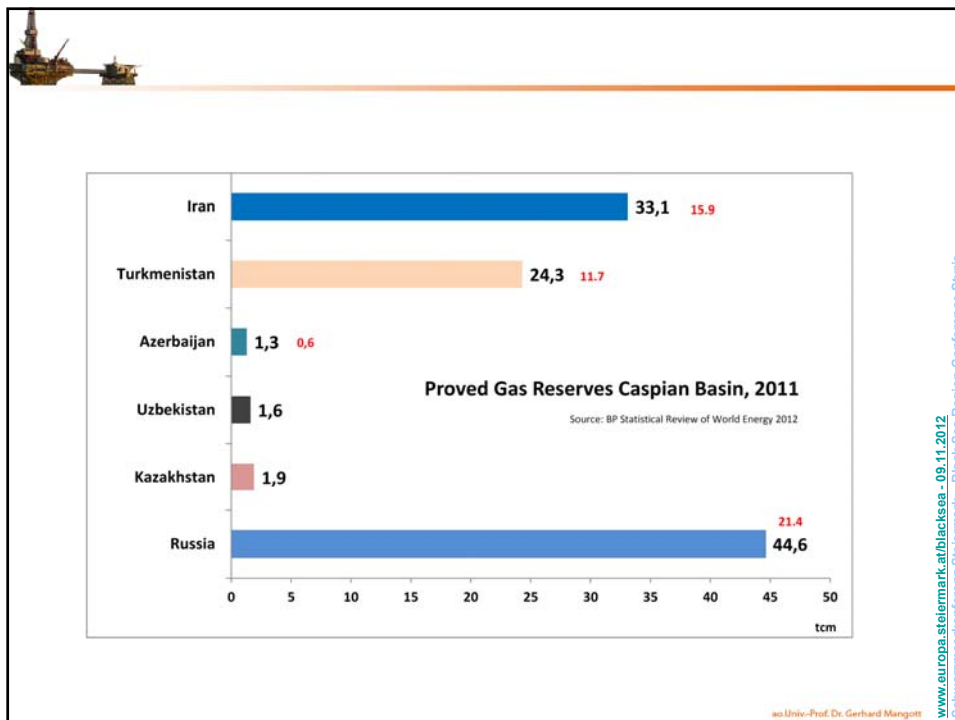
- 1. Liberalisierung des EU Energiemarktes**
 - **Third Energy Package** (Umsetzung ab März 2011)
 - **Langfristverträge** (take-or-pay, Preisformel)
- 2. Pipelinerivalität**

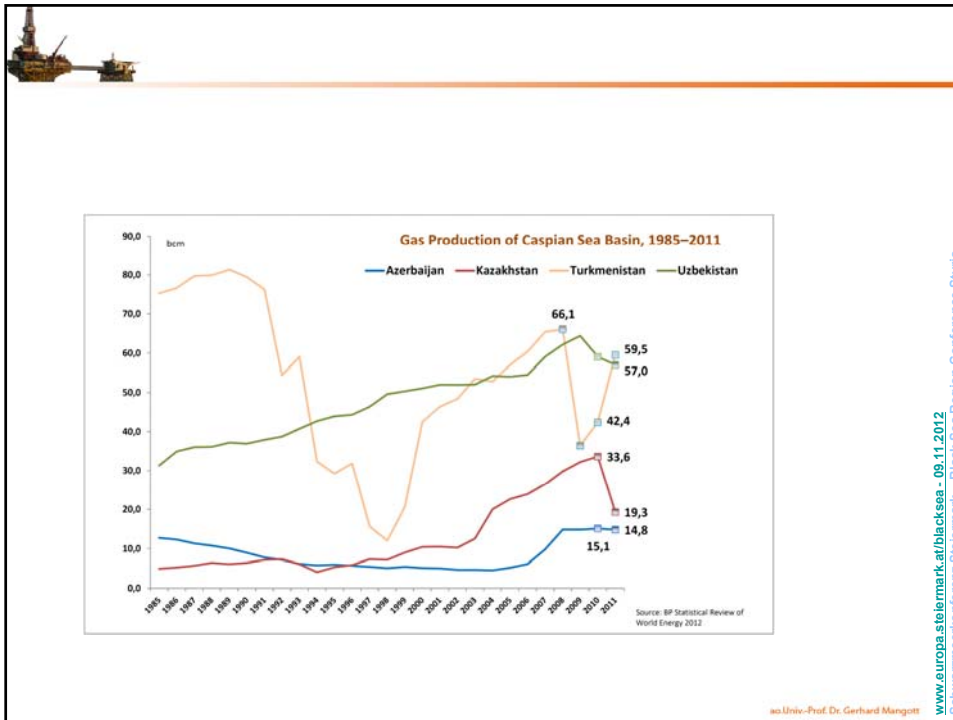
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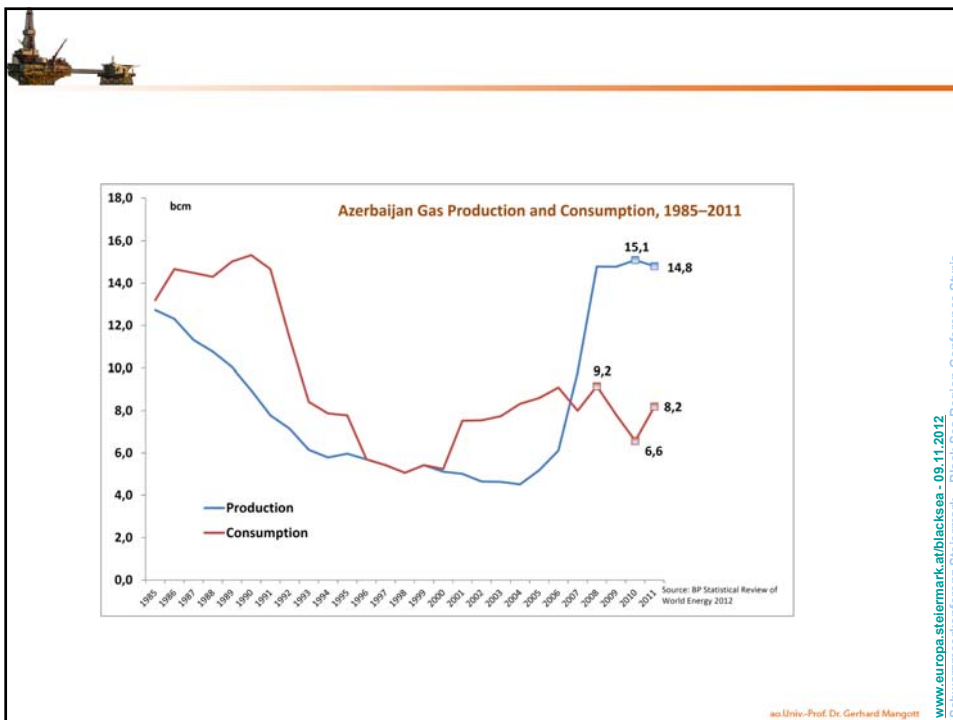






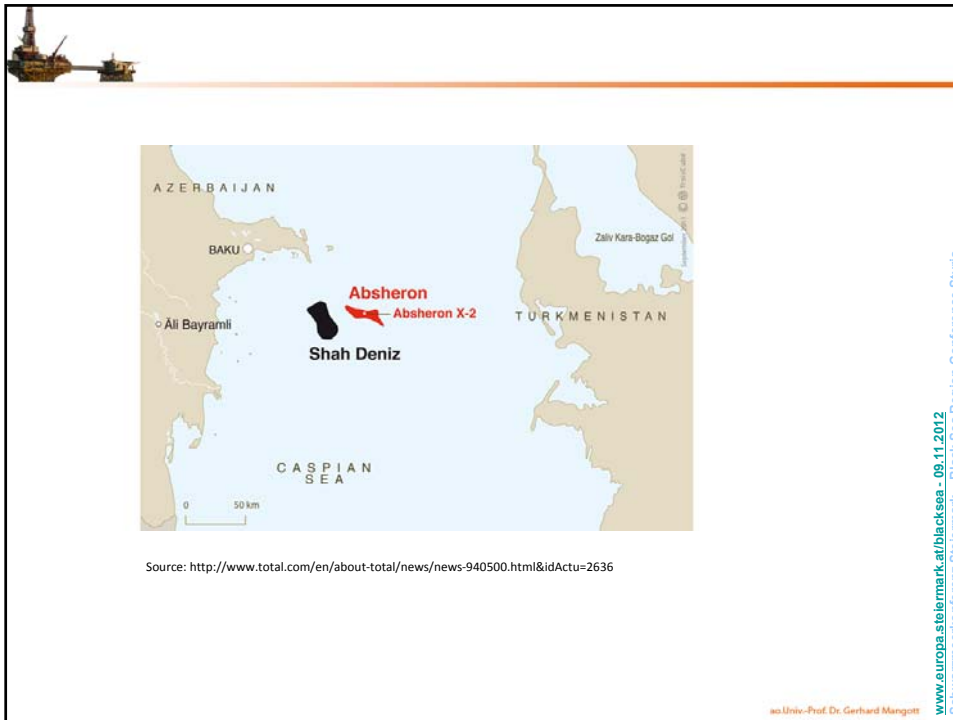
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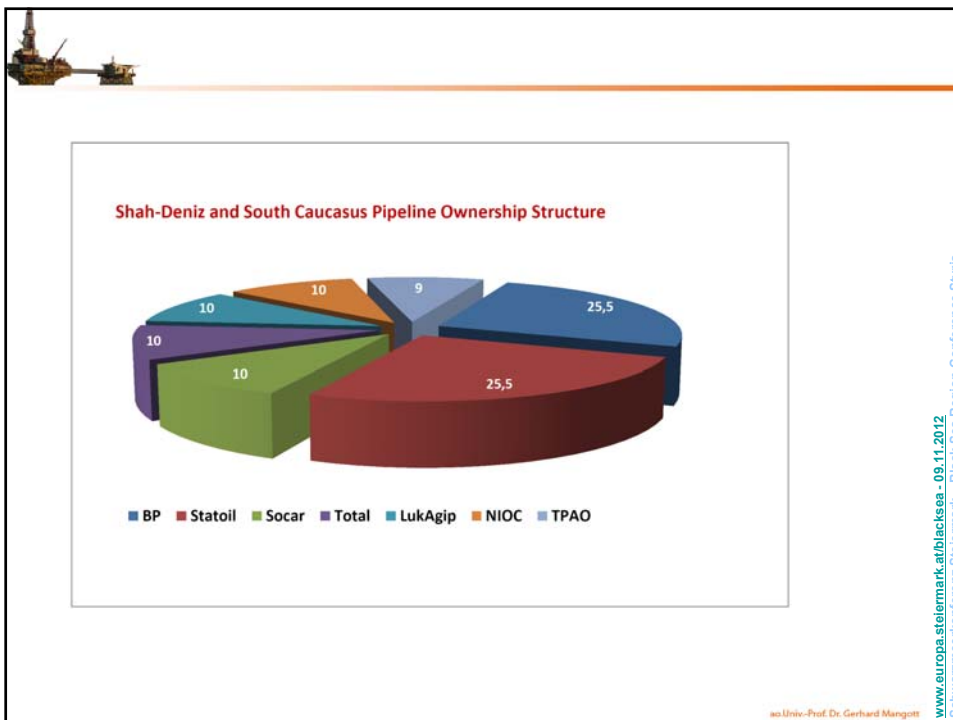
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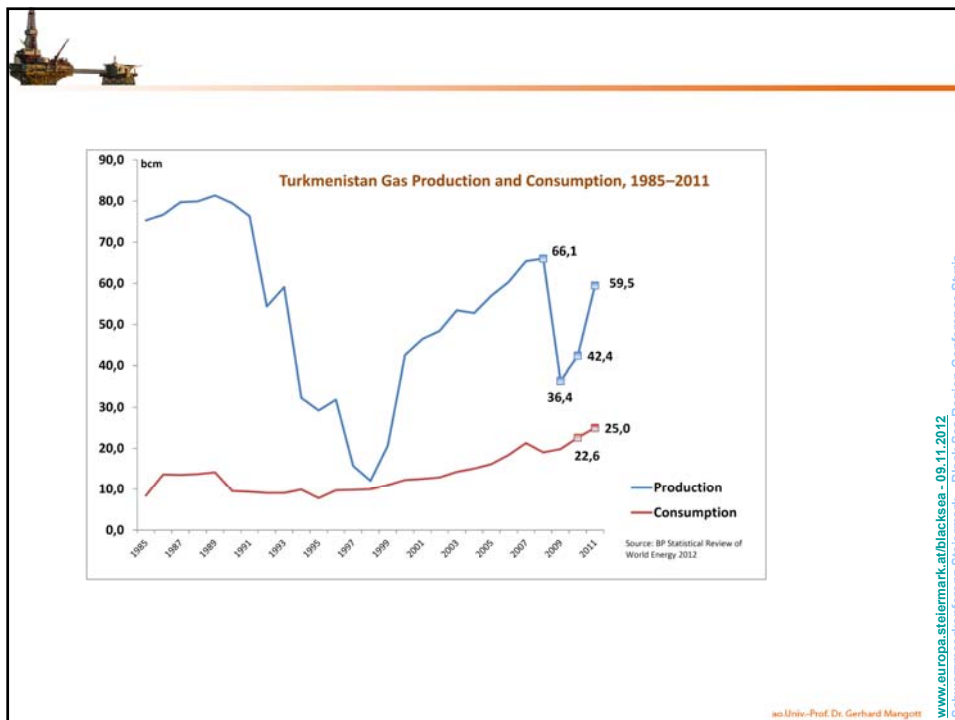
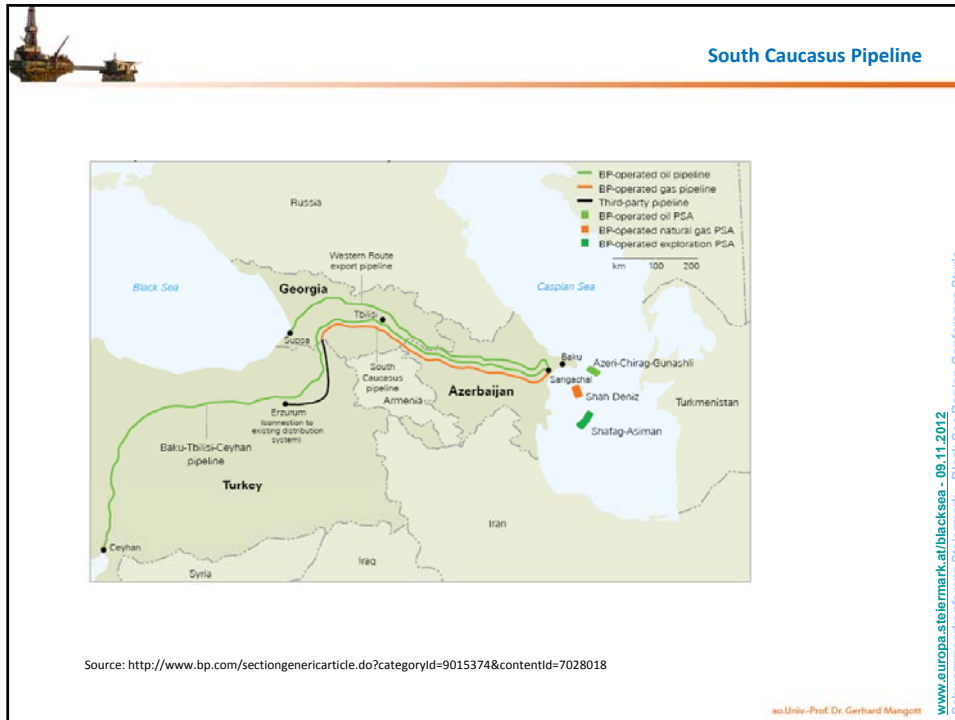
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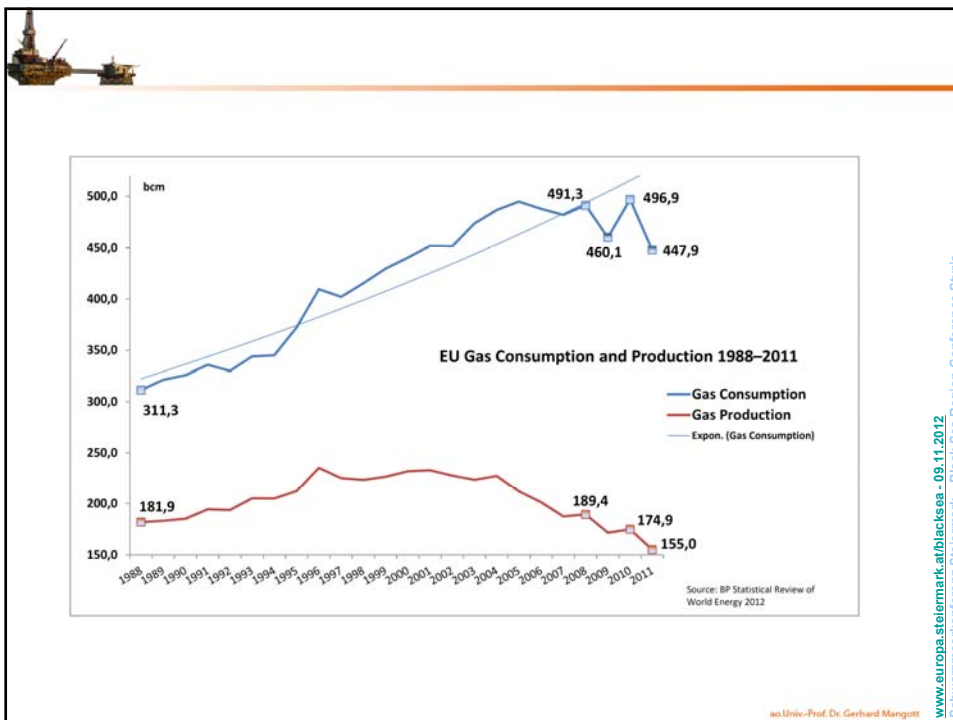
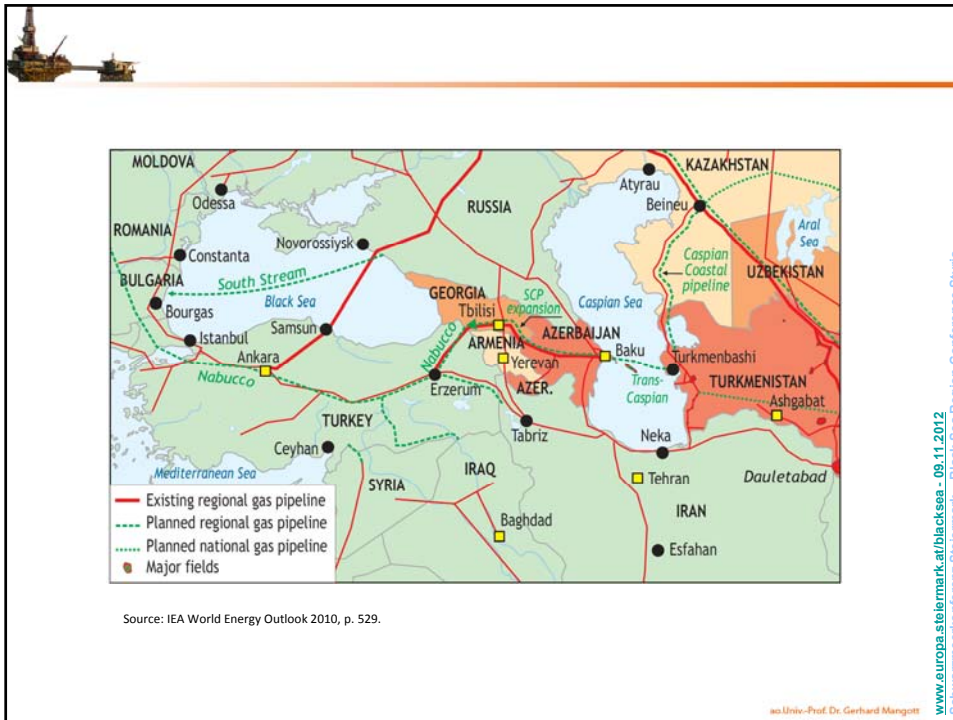
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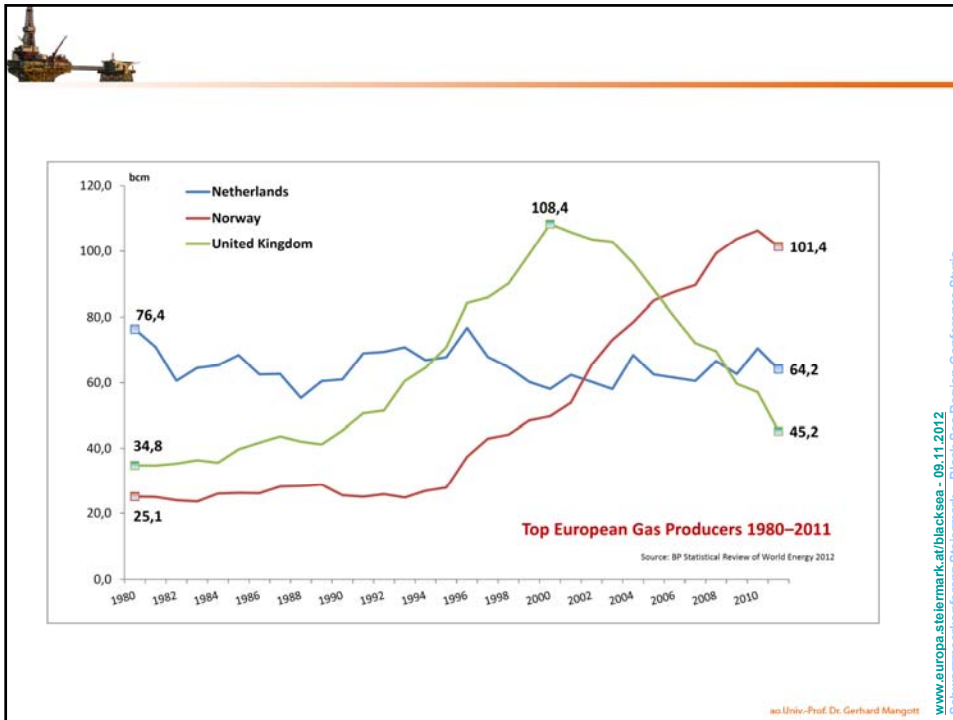


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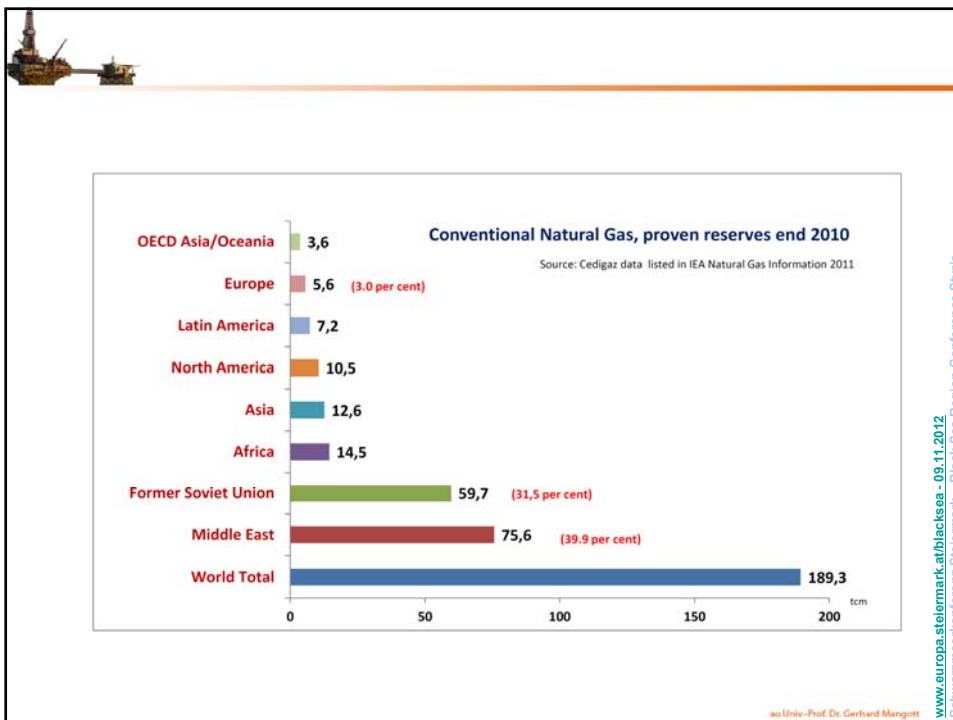






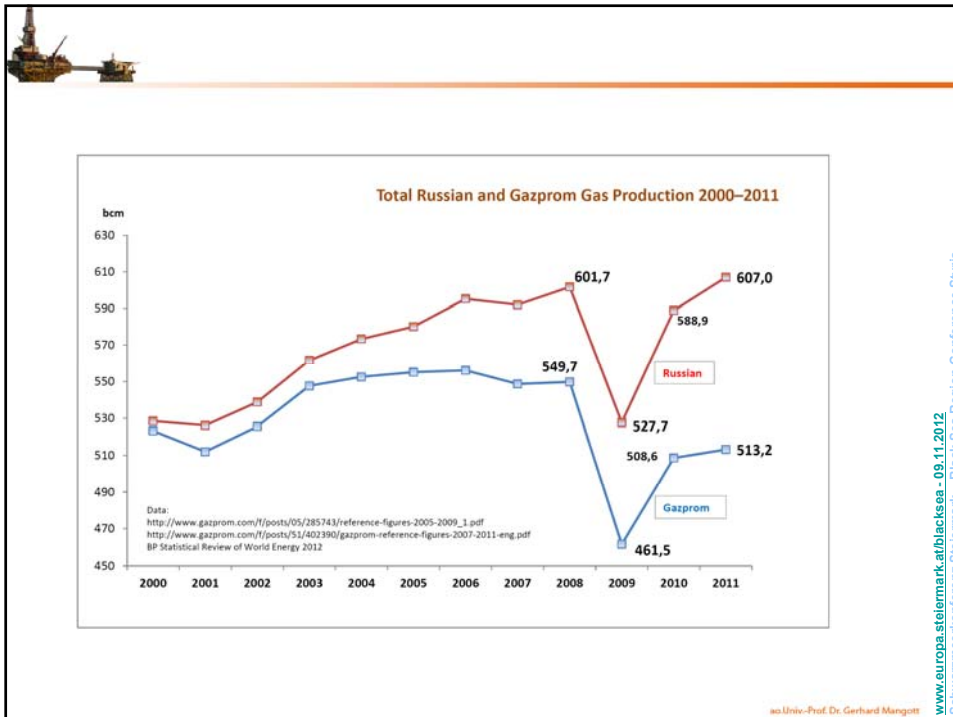
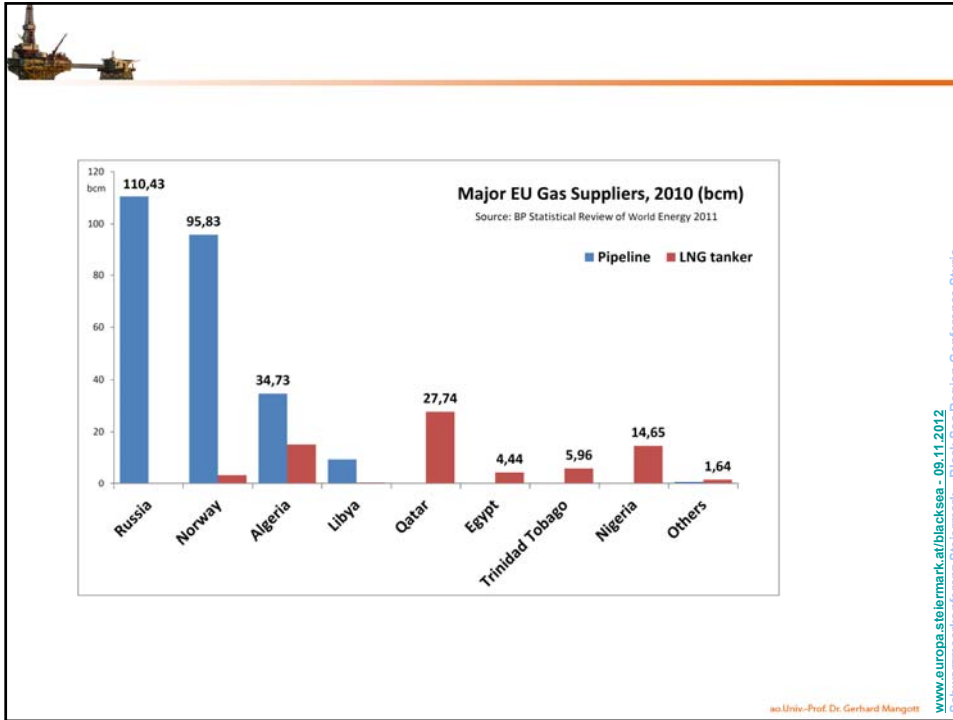
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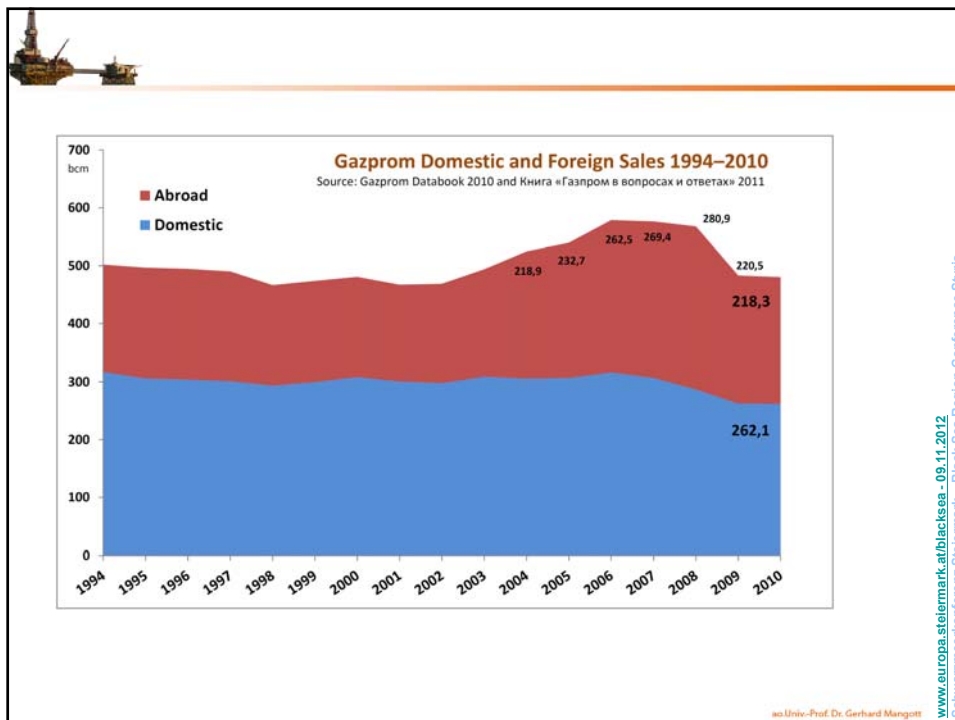
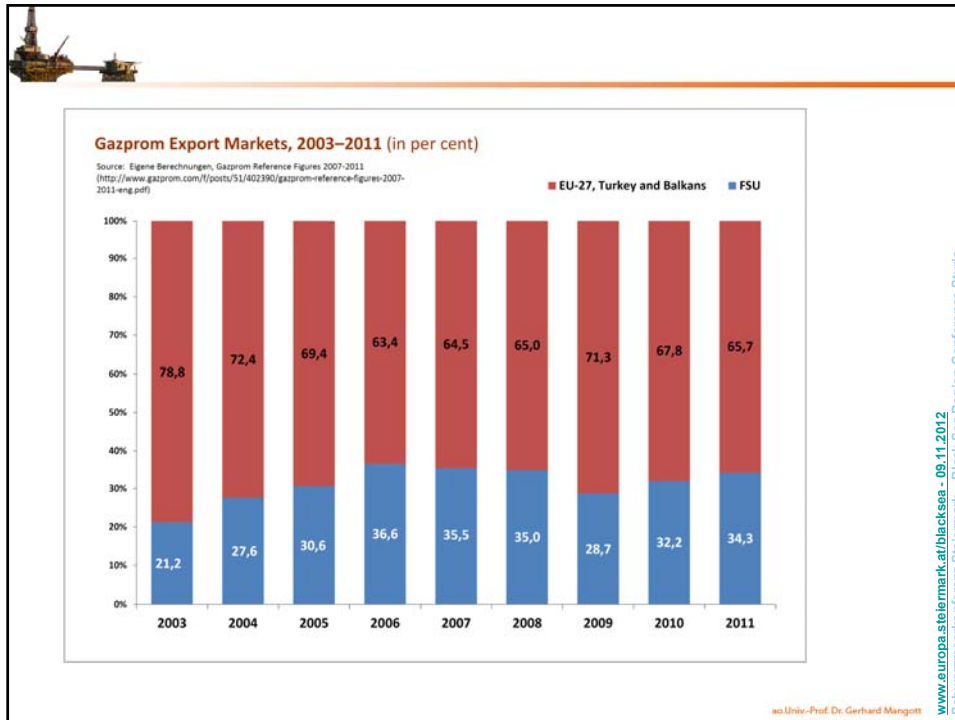
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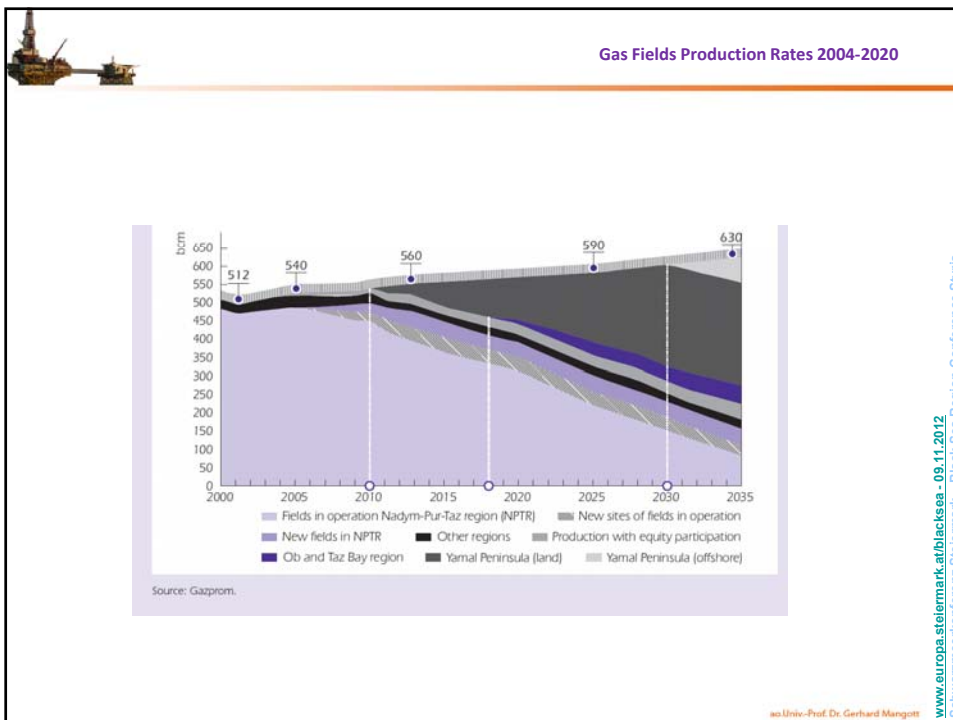
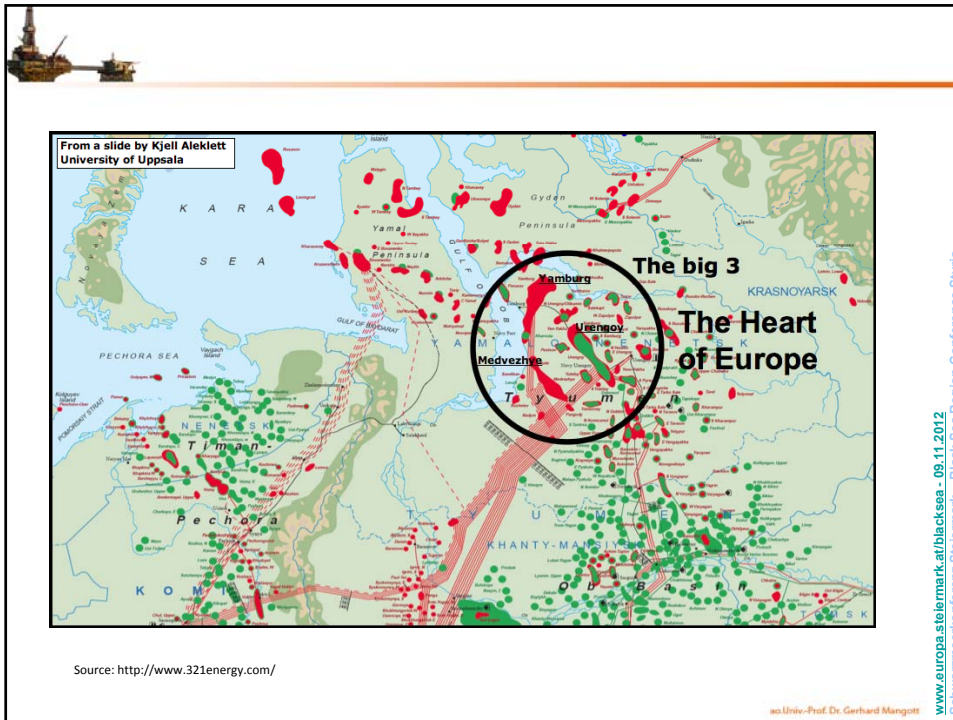


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Measures to increase gas volumes available for export

- gradual **liberalization of gas prices** for industrial consumers and private households
- **increase in energy efficiency** and measures against energy waste
- **changes to the energy mix** by expanding nuclear power and coal
- **lowering gas flaring** (associated gas) at oil wells
- **exploration of new gas fields and improving gas extraction technologies**

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Russia: Main Natural Gas Export Pipelines

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