

GIE
Gas Infrastructure Europe

PANEL

Security of Supply
Reinforcing Europe's Preparedness in a Changing Market Environment

GIE Annual Conference
LJUBLJANA
INFRASTRUCTURE FOR A NET-ZERO EUROPE
2026
22-23 October
hosted by
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François-Régis Mouton

International Association of Oil & Gas Producers

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Security of Supply Reinforcing Europe's Preparedness in a Changing Market Environment



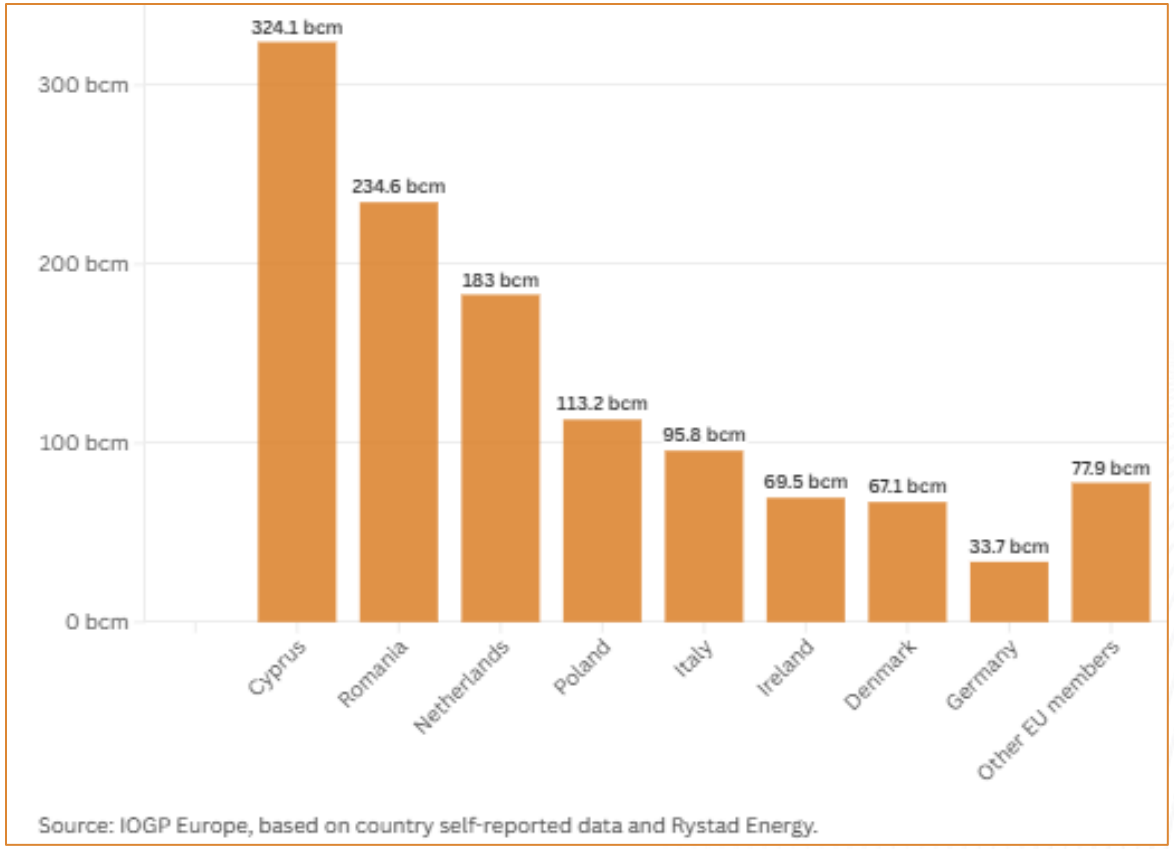
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Europe's gas resources: untapped strategic potential

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EU Natural Gas Resources

Volumes expressed in billion cubic metres (bcm) of technically recoverable resources



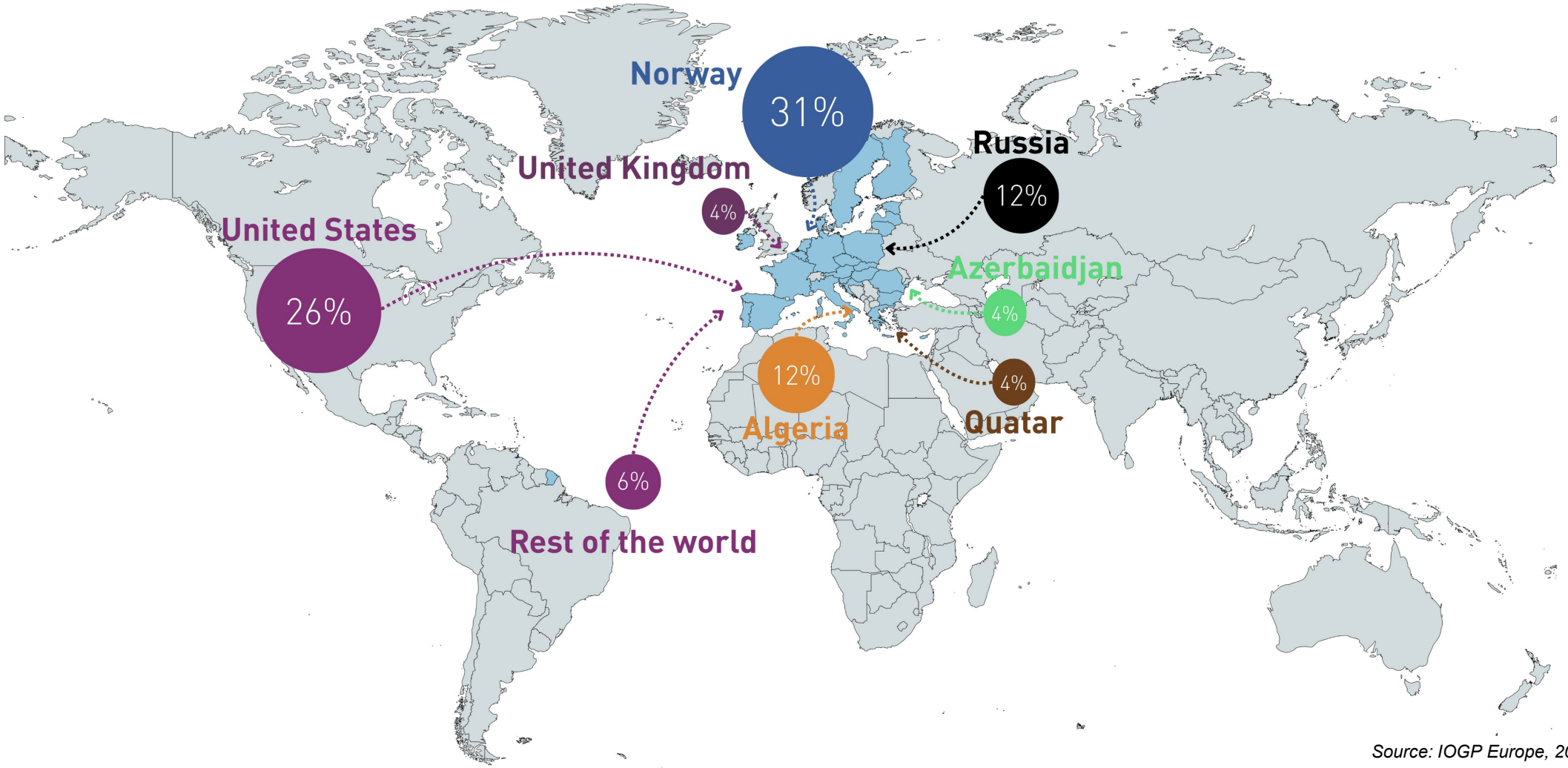
Source: IOGP Europe, based on country self-reported data and Rystad Energy.

- **530+ bcm** of technically recoverable gas resources in the EU; **2,240+ bcm** including Norway and the UK.
- **Conservative estimate:** exclude yet-to-find resources and underexplored areas (Mediterranean, Black Sea).
- **Domestic production** strengthens diversification, supports jobs and public revenues, aligns with EU climate objectives.
- **An extra 10 bcm/year of EU gas production could mean:**
  - **~30% increase** in domestic gas production.
  - **€4–8 billion/year** in displaced gas imports.*
  - **Similar to** annual EU gas imports from Qatar or Azerbaijan (2025).

*At illustrative gas prices of approximately €36–75/MWh, assuming domestic production displaces imports one-for-one.

Expand energy optionality through further diversification of gas imports

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Source: IOGP Europe, 2026

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