

## WHAT?

### SWG4's Challenge

Addresses critical challenges in the global natural gas domestic markets, focusing on demand evolution in mature and emerging markets with regards to the energy trilemma question of how to secure affordable yet as sustainable as possible gas supplies

## HOW?

### Approach to the Challenge

1



#### Hypotheses and drivers

The work included analyzing demand trends, understanding the impact of decarbonization policies on investments, measures to ensure supply security, and managing affordability issues.

2



#### Methods, debate and exchange

The methodology involved three meetings (two in-person and one online) and a Delphi questionnaire to gather insights from experts representative of a range of global stakeholders: production, shipping, trading, governments, academia.

3



#### Results and Recommendations

1. The discussion provided valuable insights into gas security and supply dynamics, highlighting the role of storage, supply diversity, and the impact of government regulations and geopolitical factors.

2. The group developed a score-card to systematically evaluate supply security, market competitiveness, affordability, regulatory environment, infrastructure readiness, and decarbonization efforts, providing a structured framework for analysis and decision-making in the global natural gas market.

3. The findings led to recommendations on how to monitor and assess supply security levels in downstream markets thereby allowing decision makers to respond to upcoming challenges early.