

Gastech Energy Club

LEADERSHIP ROUNDTABLES

Ministerial Roundtable:
Leveraging energy policy to achieve
energy security and sustainability goals



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Roundtable abstract

Energy policy plays a crucial role in shaping the future of global energy systems. With rising energy demand, climate change and ongoing global geopolitical tensions, policymakers face the task of implementing policies that balance national objectives against global priorities, including energy security, affordability, diversification and decarbonisation.

Effective policies are essential for ensuring a reliable and resilient energy supply, driving sustainable GDP growth and meeting ambitious mid-century climate targets. They are also critical in creating environments that enable technological innovation, new capital market investment and the deployment of lower-carbon and clean energy solutions.

To overcome barriers to success, such as, regulatory or market complications, investment requirements or operational complexities related to transitioning to a lower-carbon energy system, a coordinated approach between governments, industry stakeholders and international investors is required. This includes establishing and expanding new cross-sector and cross-border partnerships.

During this roundtable, ministers and policymakers explored actionable strategies and policies to address global energy security while driving decarbonisation and sustainable economic growth.

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Dr. Fatih Birol
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Simon Flowers
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MODERATOR

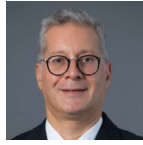


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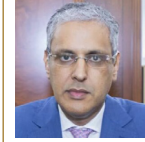
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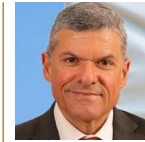
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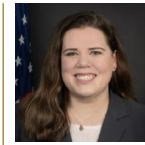
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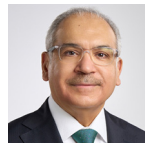
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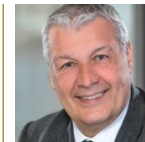
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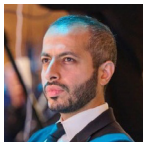
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Roundtable outcomes

No comments are attributed to any one participant.

Key findings

- The geopolitics of energy is reshaping supply, investment and markets at pace. Energy security remains the priority.
- Demand for gas globally remains strong and is rising. Rapid electrification and new demand drivers are leading to surging investment in supply, particularly from the US but also around the world.
- Governments can't do everything – clear recognition that delivering energy security, affordability and sustainability needs huge amount of private capital. To achieve this, governments are working to improve and stabilise regulations to help de-risk energy supply and infrastructure investment.

The geopolitics of energy is rapidly changing the market outlook

A rapidly evolving new geopolitical reality is transforming the outlook for energy supply, investment and markets at pace. Attendees from around the world were united in their view that energy security and affordability top the policy agenda, with governments responding by prioritising reliable energy supply. Decarbonisation goals remain in place but must be proven implementable and cost-effective.

The Trump administration's pursuit of energy dominance through hydrocarbons is in marked contrast to China's push for low-carbon electricity. The consequences for gas and LNG are profound, with new US LNG supply surging ahead at breakneck speed, delivering ever more volumes of LNG into the global market. At the same time, trade tariffs are changing supply chains and rewriting the outlook for global trade. On emissions, no major country is currently on track to meet its nationally determined contributions (NDC) goals for emissions reduction by 2030. Without the US, the chances of countries raising their NDC targets to put the world on track for a 2 °C pathway or lower will be remote, increasing the prospect of strong-for-longer oil and gas demand.

Roundtable attendees heard that Europe has clarity on its strategic direction for future energy supply. Climate neutrality by 2050 remains the goal but increasingly needs to align with the changed geopolitical reality. All options are on the table, with a willingness to embrace greater flexibility in meeting future energy demand.

The call by US President Donald Trump for Europe to end its imports of Russian energy and the EU's roadmap to fully end dependency on Russian energy by the end of 2027 will have global ramifications. As a result, more Russian LNG is expected to be available to markets outside of Europe.

Participants noted that cross-border cooperation is still achievable and that while this is being complicated by geopolitical fragmentation and trade tensions, new and more diverse partnerships are emerging.

Governments are ramping up commitments to grow energy supply, including gas

The reality for governments around the world now is to ensure growth in energy supply while maintaining economic competitiveness. The US is the standout case for LNG export growth, but roundtable attendees from around the world made strong arguments in support of clear policy frameworks that attract investment and accelerate investment in energy supply, including gas.

Participants from the Global South also expressed a clear ambition to support meeting energy demand growth through incentivising investment in oil and gas, not only to meet rising domestic demand but also for export into market such as Europe. Fiscal terms, regulatory changes and cross-border collaboration were all raised as decisive factors in realising growth in energy supply.

Delivering on energy security and sustainability requires partnerships with private capital

Governments will play a key role in ensuring the growth in energy supply, but ministers were united in their recognition that government can't do this alone. Access to capital will be a determining factor, and governments have long accepted that private capital must be encouraged and increased if energy is to be developed in a timely and sustainable manner.

While the appetite for financing new LNG supply in the US remains very strong for both debt and equity players, several ministers noted that developing gas in emerging economies can still be a challenge. At the same time, in the EU, subsidies and incentives for low-carbon technologies are increasingly expensive to sustain and politically complex to implement.

Underpinning access to capital is the critical role of energy policy and regulation. Government participants from around the world recognised their responsibility to support investment in energy supply – including gas and LNG. The roundtable heard numerous commitments from ministers and leading players to work collaboratively to improve and streamline policies and regulations to help de-risk energy supply and infrastructure investment.



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