

INTERNATIONAL FORUM - 'RUSSIAN ENERGY WEEK' PROGRAMME

October 3–6, 2018, Moscow

Programme accurate as at August 24, 2018

[Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness](#)

Global Energy 2035: Overcoming Barriers and Consolidating Opportunities

The world today has entered the fourth industrial revolution: all aspects of life are changing, and energy is no exception. World energy markets are currently undergoing a profound transformation that is significantly changing the volume and structure of demand and leading to increased competition across the globe. Technological advances are only serving to increase the pace of change. Today's key trends include the evolution of the energy mix in favour of cleaner sources; the increasingly prominent role played by the climate agenda (and consequently, the development of renewable energy sources); the all-pervading digitalization of life and the economy, and the development of technologies; and the globalization of the fuel and energy sector, and with it, the increasing accessibility of resources. And above all is the question of the petrol station versus the power outlet. What future awaits traditional energy? How can global energy security be ensured in a such a volatile economic and political climate?

New opportunities and hidden threats associated with the fourth industrial revolution. How can new trends in the global energy market be predicted?

The implementation of new energy resource extraction and production technologies to maintain competitiveness. The current status in Russia.

Gas as a solution to the issue of climate change and an alternative to renewable energy sources in the near future.

The sustainable energy of the future's fuel mix: Russia and the world. Current threats to the oil demand.

Tackling energy poverty and increasing energy access across the globe.

[Realizing the Potential of the Energy Sector](#)

The Global Gas Market in 2030

According to forecasts made by major market analysts, gas will remain the only fossil fuel in the foreseeable future to successfully compete with renewable energy sources in terms of growth in consumption, and to increase its share in the energy mix. Technological progress and the globalization of the LNG market has made gas accessible throughout the world and led to an increase in the number of consumers. However, the increasing role played by gas in the global economy is resulting in the politicization of gas markets, leading to problems for investors and consumers alike. Will the global gas market be able to develop mechanisms to protect itself from political pressure? Is the gas market susceptible to a new wave of regionalization? Can LNG compete with pipeline gas on equal terms? Will the gas market be able to disassociate itself from the oil market? What technologies will help gas compete successfully with renewable energy sources and nuclear energy?

[Realizing the Potential of the Energy Sector](#)

Identifying a Strategy to Succeed on the Global Petrochemical Market

The petrochemical industry is growing apace – at twice the rate of global GDP. At the same time, this growth has a strongly pronounced regional differentiation in terms of raw materials and output. Countries without an extensive resource base, such as those in the EU as well as Japan and South Korea are seeing growth in light-duty production with a considerable innovative component based on naphtha. In the Middle East, USA and several other countries, the sector's growth comes from major projects based on natural gas processing. In China, coal and coalbed methane are widely used in the petrochemical industry. Countries are applying various mechanisms to regulate and encourage growth of the industry, and are increasing their competitiveness in various product niches. Why is it that the strategies of countries with fewer resources bring greater economic results? What measures to foster growth of the industry will result in the greatest economic benefit from cheap commodities? What restrictions are hindering Russian producers from increasing their competitiveness in global petrochemical markets? What can the government do to help develop petrochemical clusters? What are the prospects of new projects in the East of Russia? What infrastructure do Russian petrochemical companies lack?

Realizing the Potential of the Energy Sector

The Electric Power Industry: Challenges of the Fourth Industrial Revolution

For companies – and indeed countries – to be competitive in the fourth industrial revolution, they will require expertise and best practices in digitalization, automation, and the industrial internet of things. Companies at the forefront, both in Russia and other technologically developed countries, are developing and implementing smart grids, smart energy distribution, new energy-storage technology, consumer services, and the energy internet. As well as changing market demands, companies also have to examine fast-growing technologies and drivers of disruption. Can the economic benefit from implementing new technologies already be felt? What technological and social problems do companies face in the process of digitalizing the electric power industry? Where will investment come from in order for plans to come to fruition? What government support do companies rely on?

Open Meeting of the Supervisory Board of the Assistance Fund for Housing and Municipal Service Reform

The Assistance Fund for Housing and Municipal Service Reform is a Russian state corporation. It assists in resettling people residing in unfit housing, modernizing the utilities infrastructure, implementing energy-saving technologies, and increasing energy conservation in the housing and utilities sector, including through overhauling residential apartment buildings. The implementation of these solutions on a long-term basis underscores the need to attract private funding to modernize housing and utilities in general. What tools should be employed for further growth of the sector? How can the sector's investment climate be improved, and how can private capital be attracted to solve the main issues affecting the sector? This open meeting of the fund's supervisory board will examine the organization's results in these areas. Proposals submitted by a working group of experts on improving the investment climate of Russia's housing and utilities sector over the period 2018–2025 will also be discussed, and approaches and proposals to further develop the sector drawn up.

Realizing the Potential of the Energy Sector

Will the Coal Industry Remain a Driver of Economic Growth in Developing Countries?

Growth in the consumption of coal across the globe is slowing as a result of tougher environmental requirements in developed countries. Nevertheless, the low cost of coal makes it an irreplaceable fuel for developing countries, where around 1.5 billion people still don't have uninterrupted access to modern forms of energy. Can coal drive economic growth and improve living standards in these countries? What energy markets are the most promising in terms of demand for coal? Is it worth waiting for breakthrough technologies in coal transportation, processing and consumption, which will increase its competitiveness with natural gas and renewable energy sources? Can coal chemistry, metallurgy, construction and other industries compensate for falling power generation demand in developed countries?

Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness

Unlocking Russia's Potential in the Global Renewables Industry

The global energy industry is undergoing a period of irreversible transformation. The concept of energy transition frequently appears in countries' political agendas. It is geared towards the large scale use of green energy sources and renewables, the decentralization of markets, the introduction of smart infrastructure, and the transition from consumer to prosumer behaviour models. As a leader in global energy markets, Russia is acting with these global trends in mind. Each year sees the number of renewable energy facilities increase. Russian technologies are developing, and production of equipment for renewable energy sources is increasing. Domestic companies are exporting their products. Taken as a whole, this heralds a new chapter in Russian renewables. What are the priorities for the continued development of the Russian renewables sector? As a knowledge-intensive, high-tech and export-oriented sector, could renewables help accelerate economic development? What is the potential for international cooperation in the production and trade of renewable components? What are the most promising renewable markets for Russian technologies? What is the likelihood of breakthrough technologies appearing which will dramatically accelerate the development of renewable markets? What changes should be made to government support for Russian renewables?

Realizing the Potential of the Energy Sector

A Breakthrough Scenario for the Nuclear Energy Industry: Prospects for Global Energy

The growth of the nuclear energy sector is due in part to efforts to reduce greenhouse gas emissions, the spread of environmentally friendly hydrogen engines, and attempts to tackle energy poverty in remote and less-developed regions. As competition between natural gas and renewable energy sources intensifies, plans to develop the industry may be aided by the next technological breakthrough – the transition to 4th-generation reactors, the integration with heating systems and the manufacturing of industrial products, a solution to nuclear waste, and perhaps the development of thermonuclear fusion technologies. What solutions in regulation and electricity markets are needed to achieve the ambitious target set by the World Nuclear Association to make nuclear account for 25% of the global energy mix by 2050? How can the development of the requisite technologies (small modular reactors, hazard-free fuels etc.) be given a boost? Can the investment platform be widened? How should international cooperation mechanisms be improved in the field of peaceful nuclear energy? What solutions can be employed to improve trust in the sector, both at a societal level and in government institutions? How soon will it be before the nuclear battery becomes a standard source of energy in each apartment building?

Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness

Geopolitical Scenarios and Energy: The New Reality

Geopolitics is beginning to play an increasingly significant role in energy. This cannot but affect the predictability and manageability of processes on global energy markets, thereby giving rise to a new reality. What specific threats may arise, and given the current climate, is the requirement for sustainability in global energy development achievable, or mere fantasy? Who should determine the pathways of such development? After all, in 20 years, countries outside the OECD will account for two thirds of world energy consumption, according to current assessments. Do traditional sampling studies of separate development scenarios help? In the current environment, should energy scenarios not be assigned a greater role and significance when drawing up responsible and practical recommendations in energy? Has the time come to discuss the creation of an early strategic warning system to identify and counter threats on the pathway to sustainable energy development? How will open, multilateral dialogue between leading international experts in global energy forecasting and analysis help to solve these issues?

Fourth Russian MediaTEK Competition for the Media and Press Offices of Energy Companies and Regional Governments

Entrants include national and regional media outlets, journalists, and the PR departments of energy companies and regional governments. The competition aims to improve communication between energy companies and the outside world, inform the public of development projects in energy, encourage projects aimed at popularizing the image of energy-industry professions, and raise the profile of workers in the energy, oil, and gas sectors. The results of the competition will be announced at the Russian Energy Week Energy Efficiency and Energy Development International Forum.

Realizing the Potential of the Energy Sector

Developing Infrastructure for Economic Growth and Improved Living Standards

In line with a presidential decree, the Government of the Russian Federation is drawing up a comprehensive plan in partnership with regional administrations to modernize and expand critical transport infrastructure. Experts have claimed that annual investments of around RUB 2 trillion are needed for infrastructure. At the same time, innovative and digital technologies are to be implemented, greatly improving business and public services. Fulfilling such ambitious objectives requires a coordination of efforts between infrastructure industries, the regions, equipment manufacturers, and the financial sector. How will fulfilling priority infrastructure development objectives affect regional policy? Which tasks will be undertaken by companies? What sources of funding for priority projects have been identified? Do Russian companies possess sufficient expertise to fulfil infrastructure development objectives, and what overseas experience and technology could prove beneficial? Which countries' experience was drawn upon when preparing the Government's comprehensive plan?

Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness

The Effectiveness of Energy Regulation: General Approaches and Divergence between Countries

The energy sectors of various countries need to respond to shared challenges arising from the climate agenda and the current technological revolution. Nations need to identify ways to limit greenhouse gas emissions, establish their position on the development of nuclear power, and solve issues caused by a deficit in infrastructure at a time marked by digitalization and a new wave of electrification. Naturally, when tackling these challenges, regulators consider aspects specific to each country: the structure of the economy, the availability of resources, environmental and social requirements, and others. At the same time, they need to strike a balance between the interests of consumers and producers with regards tariffs, and solve issues related to long-term energy security and environmental safety. Which of the regulators' solutions have proved to be the most effective from the point of view of investment attractiveness, energy security, and public spending? What other parameters can be used to assess the effectiveness of government policy in the energy sector? Which new factors (the spread of electric cars, trade wars, technological equality etc.) may influence a change in government policy? Could government policy be used to prepare for a potential sea change in global energy?

Realizing the Potential of the Energy Sector

Tax Reform in the Petroleum Refining Industry

A tax reform is under way involving the gradual abolition of customs duties for oil and petroleum products, an increase in tax on extracting mineral resources, and the introduction of excise duty for oil. In order to kick-start the modernization of petroleum refining, an excise return programme will be introduced for companies signing a modernization agreement, or an agreement to manufacture Euro 5 car petrol and petroleum feedstock.

- The effect of the reform on consumers.
- Protection mechanisms against price increases for petroleum products.
- Maintaining the stimulus to continue modernizing petroleum refining in Russia.
- Benefits of the reform for the Russian market.
- Long-term stimuli for the development of petroleum refining.

Realizing the Potential of the Energy Sector

The Development of Pricing on the International Oil Market: New Benchmarks, Currencies and Settlement Technologies

The current pricing mechanism based on existing benchmarks has recently come in for criticism as a method of ascertaining a fair market price for oil. This is due to a significant fall in output at fields which largely account for the best-known price benchmark. However, new benchmarks are coming to the fore, based on more stable oil flows from the point of view of production volumes and quality characteristics. More accurate pricing will also facilitate the creation of benchmarks through direct quoting. There is an ever-increasing trend for pricing to instead be based on exchange contracts, in order to best reflect market value. Aspects related to settlements in national currencies and applying blockchain technologies are of no less importance. Will the leading benchmarks change over the next 3–5 years? Will the CIF and FOB markets lose ground? When will oil companies show more interest in direct quoting of Russian oil? What role will quoting in yuan play with regards Chinese petroleum storage reservoirs? How will the global crude oil market change as digital platforms and blockchain technologies develop?

Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness

Building Cooperation between Russia and the EU in Energy Efficiency and Energy Development

Cooperation between Russia and the European Union in energy and energy efficiency is crucial to sustainable global economic development. Russia is already a reliable supplier of environmentally friendly energy supplies to European consumers, and is assisting the EU's transition to an economy with a minimal climate footprint. In 2018, Russia and the EU set ambitious targets to improve energy efficiency by 2030. Through working together, these two major markets will bolster global energy security, technological modernization, and improve living conditions through the use of smart city systems. What should be done to get the most out of cooperation between Russia and the European Union in energy and energy efficiency? What role can business play in expanding cooperation? How will the ensuing transition to a digital economy help improve energy conservation in Russia and the EU? What European innovations could be particularly in demand in Russia, and what is the potential of scientific and technical cooperation in energy and energy efficiency? Do steps need to be taken to synchronize Russian and EU legislation in technological and environmental regulation in order to maximize the synergistic effect of energy efficiency policy?

Realizing the Potential of the Energy Sector

Meeting of Chief Engineers of Heat-Suppliers

Work is well under way on new operating rules for heat supply facilities and heat consumers, as outlined in the Russian Federal Law "On Heat Supply". In the 15 years since the old rules were approved, the heat supply industry in Russia has changed dramatically. The new document will take these changes into account, which concern the improvement of heat supply management; the establishment of an institution to unite heat suppliers; and an increased role and independence for heads of operating companies and owners of heat supply facilities and heat consumers. What are chief engineers expecting from the planned changes to the regulation of the sector? What can be done before the new rules come into effect? How can equipment operation be effectively organized in line with the new rules, in addition to work with the energy supervision body responsible for checking for compliance?

Realizing the Potential of the Energy Sector

Meeting of Chief Engineers of Electric Grids

Today's need to digitalize the grid is predicated on the transition of production and transport to a single type of energy (electricity); the proliferation of distributed generation across the globe; the creation of microgrids; and the development of electricity and renewable storage devices which a consumer can install themselves, thereby becoming an electricity producer. Digitalization does not only mean clear benefits to the consumer, but also extra costs borne by grid companies, and the need to change professional training programmes. How will self-operated and self-diagnosable digital electric grids affect reliability, expenses for the chief engineer, and quality of services for the population over the medium term? What needs to be done to ensure the greatest possible effect from digital grids from the very first years of their implementation? Will the rewards of digitalization be greatest in large cities or remote settlements? What competencies will an energy professional require to create, operate and repair digital grids? Should they be IT specialists with knowledge of energy, or energy specialists with knowledge of IT? Is a "digital electrician" required if digital grids can work without a person's input?

Realizing the Potential of the Energy Sector

Presentation of the Energy Efficiency Rating of Grid Companies

In collaboration with the expert community, the Ministry of Energy of the Russian Federation will submit for discussion the results of the annual energy efficiency rating of grid companies, based on results for 2016–2017. The rating evaluates efforts made by companies to reduce losses in the grid, implement modern technologies, and optimize the development of infrastructure. It does not only aim to measure a company's success, but also to identify and publicize best practices. Among those attending the discussion of the results will be representatives of regional and municipal ministries of energy, housing and utilities, energy companies, and experts.

Realizing the Potential of the Energy Sector

Presentation of the Heat Supply System Efficiency Rating of the Russian Regions

In 2018, the Ministry of Energy of the Russian Federation continued their collaboration with the regions and expert community to draw up a heat supply system efficiency rating for Russian settlements. Ratings of municipalities take place at the regional level, while ratings of regions take place at the national level. The rating evaluates efforts made by government bodies of all levels to create an environment conducive to a reliable, incident-free heat supply, a reduction in fuel consumption, a reduction in heat losses, the application of modern technologies in thermal networks and for use by the consumer, the updating of heat supply plans, and the implementation of the incorporated action plan. It does not only aim to measure a company's success, but also to identify and publicize best practices. Among those attending the event will be representatives of regional ministries of energy, housing and utilities; energy companies, and the expert community. Discussions will focus on the results of the rating, and experience will also be shared on applying best practices in heat supply system management and in implementing modern technologies in the industry.

Realizing the Potential of the Energy Sector

Renewable Energy Sources in Russia: From the Wholesale Market to Supplying Energy to Isolated Regions

A foundation to develop distributed generation based on renewables has already been built in Russia. The ongoing renewable development programme has enabled new solar and wind generation facilities to be commissioned at a faster rate, and for a components industry to be built. Each year, installed capacity of renewable energy sources on the Russian wholesale market approximately doubles, and will continue to grow at a consistent rate. A Russian presidential decree entitled “On the Russian Federation’s national targets and strategic objectives for the period to 2024” also outlines new approaches to supplying renewable energy to isolated regions in the Arctic, Siberia, and the Far East. What’s more, in certain conditions, renewables could prove an effective option for small settlements in Central Russia, which are currently supplied through grid extensions. What solutions are required at the regional level to support new renewable projects, and what additional ways are there to attract investors? What risks should be considered when developing renewable energy sources in isolated regions and small settlements? Are renewable projects attractive to industrial companies and/or small and medium-sized enterprises? Are there any barriers hindering the development of renewable energy sources which must first be removed? Which other countries offer experience in the development of renewable energy sources which could be applicable to Russia?

Realizing the Potential of the Energy Sector

Modernizing Thermal Generating Capacity in the Electric Power Industry

Despite the comprehensive nature of a prior programme to construct energy-generating facilities under capacity-delivery contracts, the ageing of the Russian power grid’s thermal generation complex remains a critical issue. A plan to deploy electric power facilities over a period up to 2035 calls for decisions on investments to be made with regards the high capacity of current thermal generation (thermal power plants and regional power stations), and questions to be answered regarding their modernization, or decommissioning and replacement. The most crucial challenge is implementing a fully-fledged market mechanism for such modernization within the shortest possible timeframe. What would be the ideal date for the first modernization projects to be launched? How can a balance best be struck between providing support to Russian power engineering and ensuring reliable operation of the energy system when determining localization requirements for reinstalled equipment at thermal power plants? What is the optimal guaranteed rate of return for investors? Is it advisable to maintain the authority of the Government Commission for the Development of Electric Power with regards the selection of projects according to a separate quota? What are the selection criteria, and how can a balance be found between the interests of the regions and consumers? What is the best way of redistributing quotas for modernizing equipment which were not allocated during competitive selection on the wholesale market?

Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness

EnergyNet: The Reboot

The EnergyNet NTI roadmap was approved in September 2016 by the Presidential Economic Modernization and Innovative Development Council Presidium. It aims to develop Russian smart energy technologies and help Russian companies lead the way on global future energy markets over the next 15–20 years. The roadmap has already resulted in a number of pilot projects being implemented, improvements made to the regulatory framework and technical regulations, and a range of measures being taken to develop workforce potential. At the same time, new technology is developing across the globe at an ever-increasing rate. It will define the technological profile for equipment markets, software, engineering, and energy industry services. While this will magnify challenges for the Russian energy industry, it will also create additional opportunities to implement the roadmap and achieve overall innovative development. What results have already been achieved in the implementation of the roadmap? Which pathways to increasing the effectiveness of implementing the roadmap have matured in light of accumulated experience? What can be done to make energy companies and development institutions more engaged in the implementation of the roadmap? What additional stimuli and government support measures are required to increase the pace at which promising high-tech projects are implemented? How should measures outlined in the roadmap be transformed in this regard?

[Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness](#)

Russia–Africa Energy Roundtable

Today infrastructure, energy and housing construction are the most promising sectors for investment in Africa. In the past, development of the energy sector was not a priority for most African countries. That was because despite the fact that the majority of the population did not have sufficient access to electricity, there was enough energy to serve the mining and extraction industries developed by colonial powers. This issue remained a low-priority one for several years; however, today the energy agenda is beginning to play a key role on the continent. Even though Africa's energy sector is vital for development, it remains one of the least understood parts of the global energy system, and very few international energy research centres possess reliable information about a region, or indeed operate there. Solar energy is finally taking root in hot countries, which are beginning to fully exploit their most accessible form of green energy. South Africa is already among the top ten leading producers of solar energy, while Rwanda is home to the first solar power station, which opened in 2014. There are also plans to construct large power stations in Ghana and Uganda. Russia and African countries have the opportunity to examine a new area of mutually beneficial cooperation, based specifically on long-term strategies. Russia is an experienced player on the global energy market, offering huge potential in terms of developing, constructing, and commissioning energy facilities such as dams, nuclear power plants, grid operating companies etc., as well as in exporting and transporting energy. Russia offers a number of competitive advantages as a partner, including experience in implementing large-scale energy programmes across vast territories, and constructing grids (something the African continent is in particular need of).

[Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness](#)

Russia–ESCAP Roundtable: Building Energy Cooperation in the Asia-Pacific

Participants will have the opportunity to exchange views on ways to increase energy security through strengthening regional cooperation, and also to discuss the role of ESCAP in promoting collaboration in the interests of sustainable development. Topics for discussion will include the current state of affairs and trends in the Asia-Pacific, in particular the following:

- growing demand for energy
- demographic change and social priorities
- rebalancing global energy resource supply and demand
- ways to broaden the application of green technology in energy with the aim of fulfilling obligations specified in the 2030 Agenda for Sustainable Development (especially SDG 7) and the Paris Agreement.

[Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness](#)

Breakthrough Technologies and Human Capital in the Energy Sector: Key Challenges

The development of the country's energy sector requires accelerated growth and efficient use of human capital. Considering human resources and human capital an asset which can play a key role in increasing competitiveness should become a norm in the corporate culture of energy companies. Best Russian and global corporate practices in personnel training and development should spread across the country while Russian higher education institutions should join the ranks of leading specialised universities of the world. What personnel management models are the most promising and could serve as an additional driver for economic growth and help ensure national security? Will knowledge, technologies and expertise serve as a competitive advantage in the world of tomorrow? Do quality education and its accessibility favour the country's growth and guarantee social justice if we take globalised educational services into account? What innovative tools can be used to renovate the entire education system and make professionals more qualified considering current global challenges? What conditions encourage young people to engage in innovative projects and realise their creative and scientific potential?

All-Russia Meeting on the Promotion of Energy Efficiency and Transparency in the Fuel and Energy Complex

Russia's fuel and energy complex plays a particular role in the social and economic development of our country, providing over 30% of GDP, even amid the current high volatility on world markets. Reliable energy supply to tens of millions of consumers, and the importance of energy for the federal budget, determine the public's level of attention to the situation in the industry. In order to address large-scale investment and production goals, and their legislative support, it has been vital to boost transparency in the fuel and energy complex. In 2013–2017, with the support of the Ministry of Energy of the Russian Federation, companies and regions launched a combined effort to promote energy efficiency, professions in the fuel and energy complex, and social and environmental activities. The meeting will be attended by representatives of energy companies, regional energy ministries, the housing and utility sector, and the media. Following the results of the meeting, it is planned that priority topics for coverage in 2018 will be identified, and that a plan of federal measures to promote energy efficiency and transparency in the fuel and energy complex will be approved.

[Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness](#)

The Contribution of Natural Gas to the Process of 'Energy Transition'

Significant changes have taken place in the world's gas markets in recent years. The structure of suppliers and consumers has changed significantly, not least due to the development of the LNG sector, which has enabled a diversification of the energy landscape and led to the creation of niche and emerging markets. This trend points to the growing diversification inherent in the structure of the energy balance. Such transformations in the energy sector are caused by technological and political factors that underline the continuing need to meet the growing demand for energy while complying with commitments to protect the environment. What major market and non-market forces contribute to structural changes in the global energy system? Which countries and regions are expected to play the most significant role in shaping the energy policy landscape? How will the energy markets adapt to increased competition from alternative energy sources? What role will gas exporters play in the process of 'energy transition'?

[Global Markets, Forecasts, and Strategy, International Cooperation and Raising Awareness](#)

Environmental Policy and Climate Change Policy: Challenges and Opportunities for the Gas Industry

The ever-increasing obligations of countries to intensify efforts to reduce carbon dioxide emissions represent significant opportunities and challenges for the gas industry, especially if the energy policies of various countries which are being put into force in order to fulfil the obligations stipulated in the Paris Agreement are being steered towards non-fossil fuels. The high level of uncertainty resulting from the effect of policies following the conclusion of the Paris Agreement, as well as the potential results of this action, contribute to the development of scenarios assessing the possible role of various energy sources. The role assigned to natural gas in these kinds of forecasts is the subject of heated debate. Understanding trends in the development of energy policy, and their simultaneous impact on energy markets, especially natural gas markets, is extremely important when predicting the reaction of the gas industry concerning this matter. What are the key factors influencing policy development that are in agreement with the climate action programme? What are the opportunities and challenges arising from these policies that affect the natural gas markets? What is the potential impact of such policies on changing gas demand? To what extent may natural gas help to solve problems that impede the fulfilment of obligations in the field of environmental protection? What levers can be used to overcome the problems facing the natural gas industry? How can the gas industry best promote the use of natural gas as a driving force in the transition to a low-carbon economy?