ASIAN ENERGY SECURITY NETWORK DAILY REPORT, March 26, 2004

Recommended Citation

"ASIAN ENERGY SECURITY NETWORK DAILY REPORT, March 26, 2004", AESNet, March 26, 2004, https://nautilus.org/aesnet/asian-energy-security-network-daily-report-march-26-2004/

LATEST REPORT

Friday, March 26, 2004

Content

- Energy Update in Japan
- Japan WWF Dataset
- Irkutsk Gas Supply Project
- A GHG Baseline of CDM Projects in the Electric Generation Sector
- Developing China's Gas Market
- ROK-DPRK Trade Study
- KEDO Nuclear Project Update

1. Energy Update in Japan

The Nautilus Institute (Kae Takase and Tatsujiro Suzuki, "ENERGY UPDATE IN JAPAN," 11/8/03) released this study examining the current status of the energy market in Japan written for the Forth East Asian Energy Futures Project (EAEF) workshop convened by Nautilus Institute in November 2003 in Vancouver, Canada. This presentation features details on the current status of the Japanese energy sector, noting key changes, as well as an examination of the potential for future development and energy efficiency.

Read the full report.

Return to top

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2. Japan WWF Dataset

The Nautilus Institute ("JAPAN WWF DATASET," March 2004) released this study in preparation for Nautilus Institute's fifth East Asia Energy Futures/Asian Energy Security Program workshop to be held in Beijing, China May 11 - 15, 2004, Nautilus will release energy demand and transformation data collected from six countries to include: Japan, China, Russian Far East, Mongolia, ROK, and DPRK. Country datasets are created using Long Range Energy Alternatives Planning (LEAP) software and data is exported to user-friendly excel files for the purpose of dissemination. Currently, Japan energy data collected for the study: Carbon Dioxide Emissions Reduction Potential in Japan's Power Sector - Estimating Carbon Emissions Avoided by a Fuel-Switch Scenario, prepared for The World Wildlife Fund - Japan, is available here.

https://nautilus.org/projects/by-name/asian-energy-security/2004-2/data-and-reports/.

Return to top

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3. Irkutsk Gas Supply Project

China National Petroleum Corporation ("FEASIBILITY STUDY REPORT FOR IRKUTSK GAS SUPPLY PROJECT PASSES APPRAISAL," 11/14/03) reported that China National Petroleum Corporation (CNPC), Rusiya Petroleum and Korea Gas Corp. (Kogas) announced today that their feasibility study report for the construction of an NG pipeline from Kovykta condensate field in Russia 's Irkutsk to China and Korea and the development of Kovykta field had been approved by the sixth session of their coordination committee. Kovykta condensate field has 1.4-1.9 trillion cubic meters of natural gas in place and is capable of supplying 34 billion cubic meters of natural gas per year to Russia, China and Korea for more than 30 years. The pipeline will start in Irkutsk in eastern Siberia, skirt around the southern shore of Lake Baikal and enter China at Manzhouli on the Russian-Chinese border. After that, the pipeline will run to Shenyang and split into two branch lines, one to Beijing and the other to Dalian. Eventually, a submarine pipeline will be laid to connect Dalian and Pyongtaek in Korea. This pipeline will run 1943 kilometers in Russia and 2408 kilometers in China. The submarine pipeline will be 536 kilometers in length.

Return to top

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4. A GHG Baseline of CDM Projects in the Electric Generation Sector

Korea Energy Economics Institute (KEEI) (D. H. Yoo, "A GHG BASELINE OF CDM PROJECTS IN THE ELECTRIC GENERATION SECTOR," 12/31/03) reported that emission baselines are necessary to quantify the amount of greenhouse gas (GHG) emissions in the hypothetical "what would happen otherwise" case against which actual and monitored project emissions are compared. To examine the baseline methodologies for electric power sector in Korea, this study applied both a general approach defined in the Decision 17/CP.7 (Marrakesh Accords) and marginal approach (operating margin, build margin and combined margin). This report compared the results from two kinds of standardized methodologies mentioned above and identified some drawbacks from calculation

process due to data availability problems and a matter of judgment on load profile.

Return to top

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5. Developing China's Gas Market

The International Energy Agency (IEA) ("DEVELOPING CHINA'S GAS MARKET (2002) -- THE ENERGY POLICY CHALLENGES," 2002) reported that driven by an increasing recognition of the many advantages of natural gas and by the need to diversify its coal-dominated energy supply, China's natural gas industry is poised for rapid expansion. But expensive gas faces sharp competition from cheap and abundant domestic coal; development of gas infrastructure needs money and will take time; and the downstream market must be developed. This study describes China's gas market and examines the key issues facing industry and policy makers. It also offers a number of policy suggestions for the Chinese government to consider in its effort to boost the country's natural gas industry.

Read the full report.

Return to top

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6. ROK-DPRK Trade Study

Korea Energy Economics Institute (KEEI) (K. Y. Bang, "A STUDY ON EFFICIENCY TRADE OF ENERGY & MINERAL RESOURCES BETWEEN SOUTH AND NORTH KOREA," 12/31/03) released this study to establish a theoretical base on the mineral resource trade between the two Koreas and select the items that the two Koreas could trade, and also analyze the inter-trade effects on both Koreas, through the study of the North's trade situations with the South and other countries as well as the demand & supply structures of energy and resources in two Koreas since 1990. This study suggests that the South could supply 7 million ton of anthracite coal in stock to the North; its transport costs by railway would be cheaper than those by ship. This study also explores important issues such as the different international prices of the North's mineral resources and the transport restrictions in the inter-Korean resource trades. Lastly, direction and action plans with efficient measures for inter-Korean trade are suggested.

Return to top

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7. KEDO Nuclear Project Update

Yanhap News, ("KEDO TO SIGN MOU WITH N. KOREA ON SUSPENDED NUCLEAR PROJECT," SEOUL, 3/19/04) reported that North Korea and a U.S-led international consortium responsible for building two nuclear power plants in the North are to sign a memorandum of understanding on immigration control procedures at a construction site in the North, South Korean officials said. The accord mandates, among other things, officials of the U.S.-led Korean Peninsula Energy Development Organization (KEDO) to inform North Korea of their visit five days before their trips to the site in the Kumho area on the North's northeastern coast. "The memorandum of understanding deals with immigration control and other overall procedures," Lee Joon-jae, a special adviser to

KEDO's executive board chairman Chang Sun-sup, said. Both sides will sign the MOU and exchange documents, South Korean officials said.

Return to top

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