



Gulf Research Centre Cambridge

K n o w l e d g e f o r A l l

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Workshop No. 9

Gulf Gas Strategies

1. Directors

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2. Abstract

The workshop aims at setting up a high-standard knowledge and research platform for academics, scholars, decision-makers and any other interested person or body on the current and prospective economic and political function of the Gulf energy producers in supplying the world's markets with their needs for gas (and other forms of energy). It will also shed light on the current and prospective potential and capabilities of the Gulf gas producers and exporters and their future responsibilities for meeting the growing demand for gas, not only worldwide, but even inside their countries within the global context of energy transition.

In addition, the workshop shall highlight the importance of the gas sector to the economies of various Gulf countries and its impacts on other political, economic and social activities. The issues related to social subsidies and public financial support, their impacts on both the development and demand of gas, as well as the urgent need to diversify the rentier economies in the region away from fossil fuels would enhance the discussions and the resulting research and studies.

3. Context

The Gulf states hold large proven reserves and undiscovered resources of natural gas, both in its conventional and unconventional form, and include both big actual and potential gas producers as well as large gas consumers. Natural gas in the Gulf is the subject of different exploitation and development strategies, dependent on many factors, such as the gas reserves and resources in the region, and the trends regulating gas production and demand there.

On the reserves and resources side, volumes and forms of gas reserves and resources within the Gulf, and the resulting gas aspirations and aims, differ from one country to another, with natural gas currently viewed through a number of diverse strategies such as using it domestically in order to release more crude oil and petroleum products for export, or utilizing it for building and developing a strong petrochemical and fertilizer industrial base,

Meanwhile, many nations in the Gulf have been planning at or actually enhancing their gas production with the aim of rising their export share in the global energy market at a time when their oil output (and revenues) are limited either by production quotas or technical and geological capacities. Some other Gulf countries are using their more modest gas reserves to moderate their growing dependence on imported petroleum products and/or natural gas (in piped or liquefied form), thus minimizing their fuel imports and helping to achieve as much energy self-sufficiency as possible.

When it comes to the trends of gas production and demand, there are general ones in the Gulf, but also specific trends related to the national cases. Many factors are affecting gas production in the area, but it is clear that in the countries with mainly associated gas reserves, there is a growing need to complement the limited output of this gas and to develop other gas sources (non-associated/unconventional) in order to fulfill the growing demand. Here, the local prices of gas have clear impacts on both the development and production of non-associated and unconventional gas, and on the demand of gas within the country. The other options for Gulf countries to fulfill their growing gas deficit is to increasingly rely on import.

In fact, the Gulf region, which recently increased its share in the world gas market, has been playing a growing gas consuming and importing role. In fact, at a time when huge volumes of liquefied natural gas (LNG) have been exported from the region, many countries there, in deep deficit of gas, started importing piped gas from neighboring states and LNG from the international market. It is important in this context to analyze the actual and future features of the local gas demand in the Gulf. In addition to the impacts of its price, demand for natural gas in the Gulf has been affected by the availability of this source

of energy, either locally or from regional and global markets through pipelines or in liquefied form.

Gas demand is also shaped based on the availability and economics of other sources of energy, especially when comparing its price with those of alternative fuels. Most Gulf countries have recently scaled up their interest in renewable sources of energy, especially in wind and solar power generation, which offer the highest technological and market maturity. The experience of the UAE (Abu Dhabi) in developing nuclear energy is to be reviewed, especially its impacts on the gas demand. But what are the factors favoring the local use of gas, including the various reasons for using gas rather than oil and petroleum products in an area living on a “sea of oil” (with the Gulf holding around 48% of the global proven oil reserves)? One reason could be the growing environmental awareness in the region, and the much better and efficient economics of using gas as fuel for generating power desalinating water. Gas is also competently used as feedstock in many vital industrial applications, especially for petrochemicals and fertilizers.

As already noted, many gas-deficit countries in the Gulf are increasingly relying on import for fulfilling their demand. A small portion of this import has resulted from inter-Gulf trade which now mainly consists of significant volumes of LNG from Qatar to Kuwait, with minor quantities shipped to the UAE (Dubai). Meanwhile, large gas supplies are pumped through the Dolphin Pipeline from Qatar to the UAE and Oman.

It is interesting to review the various political and economic issues related to the still-timid gas trade within the Gulf, and the challenges in gas exchanges through pipelines which led to the failure of many schemes for regional gas grid. Maybe there is a need for united and common gas prices in the region. In this context, and considering the expected oversupply of the global LNG market in the foreseeable future, there could be an opportunity of a good portion of Gulf LNG to be re-oriented towards the region itself, and therefore establishing an inter-Gulf LNG market

While the domestic gas consumption of the Gulf will not match its gas resources in the medium- and long-term, only exports to the major consuming zones will allow the full utilization and valorization of the region’s vast reserves. For many reasons, the focus of the major gas exporting countries in the Gulf has been on global LNG rather than on international or regional pipelines, with the aim to export gas in liquefied form to global markets. However, in developing their gas resources and exporting them to regional and global markets, Gulf gas producers have been facing many challenges, including the security of gas demand, the competition from other energy sources, and the growing rivalry from other exporting regions.

It also is interesting to review the experience the UAE and Oman in simultaneously importing and exporting natural gas. In addition to exporting natural gas in its piped and liquefied forms, many projects have been seriously considered in the Gulf aimed at cheaply producing blue hydrogen from natural gas through the steam methane reforming (SMR) process, as well as blue ammonia and exporting these products into global markets.

Prospects in the three 'high-potential' Gulf countries for the development of low-carbon blue hydrogen production (Saudi Arabia, the UAE, and Qatar) have to be identified, including the existing and planned projects there. It is interesting in this context to analyze the economics of exporting hydrogen and ammonia from the Gulf rather than exporting natural gas to the final consumers where it could be used as feedstock in hydrogen and ammonia plants there.

But while the region holds advantages in hydrogen production, challenges lie in efficient transportation to lucrative markets, often doubling initial output expenses, and in providing adequate volumes of water, crucially needed in the production process. Those challenges, among many others, have to be reviewed and assessed.

4. Paper Focus/Topics

Expected paper topics should discuss issues related to the following:

- Proven Gas Reserves: Importance of the Size but especially the Form (Associated/Non-Associated)
- More Conventional Reserves to be Discovered in the Gulf?
- Conditions for the Success of Gas Exploration Efforts in the Gulf
- Growing Role of Unconventional gas in the Region: Experience of Saudi Arabia & Oman
- Factors Affecting Gas Production in the Gulf
- Need to Complement the Limited Output of Associated Gas
- Local Gas Prices & their Impacts on Production & Demand
- Options for the Gulf to Fulfil the Growing Gas Deficit
- Features of Actual & Future Local Gas Demand in the Gulf
- Interplay Between Gas & Renewables in the Gulf?
- Prospective Competition with Nuclear? Learning from the UAE Experience
- Gulf Gas for Local Use or Export?
- Reasons for Using Gas Rather than Oil & Petroleum Products
- Growing Environmental Awareness in the Gulf
- Economics of Gas as Fuel for Power Generation & Water Desalination & as Industrial Feedstock
- Political & Economic Issues Related to Regional Gas Trade
- Challenges in Gas Exchanges through Pipelines
- Potential for an Inter-Gulf LNG Market

- Simultaneously Importing & Exporting Gas: The Case of the UAE & Oman
- More Focus on Global LNG or on Regional Pipelines?
- Challenges Facing Gulf Gas Export: Competition Everywhere
- Blue Hydrogen & Ammonia Projects in the Gulf
- Exporting Gas or Hydrogen: An Economic Analysis
- Opportunities for the Gulf Brought by Hydrogen Development
- Challenges Facing Blue Hydrogen & Ammonia in the Gulf
- Technological & Economic Problems in Hydrogen Transportation

5. Publication Plans

The directors aim to include all publishable papers in a joint publication utilizing their experience with publishing houses (including MEES, MEED, Financial Times, Oxford Institute for Energy Studies) to determine the best route for publication. In addition, papers that do not fit within the joint edited volume or special issue of a journal, can be considered for individual publication in peer-reviewed journals or as GRC papers. Directors will work with participants to ensure that their papers are aligned with the publication strategy in order to maximize the possibility for publication of as many of the papers as possible.

The workshop will follow GRM guidelines on deadlines for final papers and revisions, expected to be by the end of September 2026.

6. Workshop Directors

Dr. Naji Abi-Aad started acting in September 2012 as COO to Petroleb, an oil company based in Beirut and active in petroleum exploration offshore the East Mediterranean and the Gulf. In the meantime, Dr Naji had been engaged with the US Tellurian as Senior Advisor for the Middle East from December 2016 to March 2020.

Prior to his move to Lebanon, Dr. Abi-Aad served for eight years in Qatar, first as Research Advisor for Qatar Petroleum (QP) and its Board of Directors Department, and as Media and Research Strategist in the Office of HE Qatar's Deputy Premier, Minister of Energy & Industry, before being appointed to top positions in Qatar Petroleum International (QPI).

Dr. Abi-Aad studied in Beirut at the American University (Petroleum Studies) and Université St Joseph (Law) before been awarded a Ph.D. degree in Energy Economics from Grenoble University in France. During his 35 years of experience, he has been involved in extensive consultations, conferences and studies, particularly on oil and gas in the Middle East, their resources and supply prospects. He has authored over 100 reports and studies on Middle East energy issues, as well as a book on security of petroleum supply from the region ("Instability & Conflict in the Middle East: People Petroleum & Security Threats, Macmillan, London 1997").

Bill Farren-Price is the Head of Gas Research and Senior Research Fellow at the Oxford Institute for Energy Studies. Until early 2023, he was the director of macro oil and gas intelligence at Enverus, a leading US oil and gas data analytics firm. Bill has reported and researched the Middle East energy industry for 30 years, as a specialist journalist and for the past 18 years in research and advisory.

Before joining Enverus, he founded and managed Petroleum Policy Intelligence, a consultancy providing advisory and research to oil trading, investment and research clients. PPI was acquired by Enverus in 2018. From 2007-10, he led oil research at Medley Global Advisors. His career as a journalist ran from 1993 to 2007, culminating in a period as acting editor of the Middle East Economic Survey (MEES) in Cyprus.