Panel 1: Gas Security or Gas as a Tool for Energy Security.

The Role of Basic Gas Infrastructures to Enhance Security and Diversification of Supply, Market integration and Balanced RED Development

28 Nov 2016 – Nice

Enagás: Infrastructure operator

LNG Terminals

- Barcelona: 1,950,000 m^3(n)/h ; (6 tanks: 760,000 m^3 LNG)
- Cartagena: 1,350,000 m^3(n)/h ; (5 tanks: 587,000 m^3 LNG)
- Huelva : 1,350,000 m^3(n)/h ; (5 tanks: 619,500 m^3 LNG)
- Gijón: finished. 800,000 m^3(n)/h ; (2 tanks: 300,000 m^3 LNG)
- 50% Bilbao: 800.000 m^3(n)/h ; (3 tanks: 450,000 m^3 LNG)
- 72,5% Sagunto: 1.000.000 m^3 (n)/h; (4 tanks: 600,000 m^3 LNG)
- S[illegible] in oth[illegible]minal[illegible]% [illegible]co (TLA) and 60,4% Chile (Quintero)

Transmission network

- [illegible]m of hi[illegible]ressu[illegible]ipelines [illegible]-160 bar) (>95%)
- [illegible] Moro[illegible] Alge[illegible] Franc[illegible]2) and [illegible]tugal (x2)
- [illegible]eholdi[illegible]elos pi[illegible] Mexico
- 26% shareholding in TgP, 30% in Coga and 25% in GSP in Peru
- 16% shareholding in Trans Adriatic Pipeline (TAP)
- 50% shareholding in SwedeGas

Underground storage

- Serrablo (on-shore: Total capacity 1,1 bcm)
- Gaviota (off-shore: Total capacity 2,4 bcm)
- Yela (on-shore: Total capacity 1,05 bcm)

Energy Union’s vision

EUROPEAN COMMISSION

Brussels, 25.2.2015
COM(2015) 80 final

ENERGY UNION PACKAGE

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE, THE COMMITTEE OF THE REGIONS AND THE EUROPEAN INVESTMENT BANK

A Framework Strategy for a Resilient Energy Union with a Forward-Looking Climate Change Policy

*“Our vision is of an **integrated continent-wide energy system where energy flows freely across borders**, based on **competition** and **the best possible use of resources**, and with **effective regulation** of energy markets at EU level where necessary”*

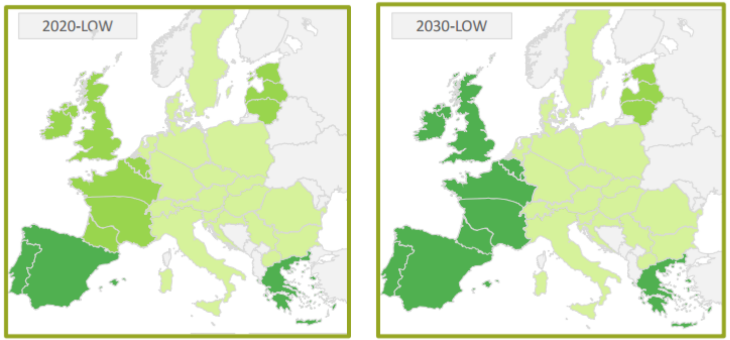
Source: EC Communication on the Energy Union 2015

EU aiming to a single and well interconnected market

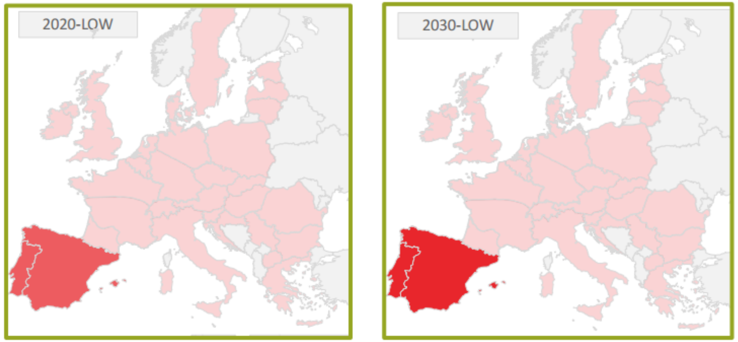
TYNDP identifies the need for more interconnection capacity

CSSD

- 50% - 100%
- 25% - 50%
- 15% - 25%
- 5% - 15%
- 0%-5%



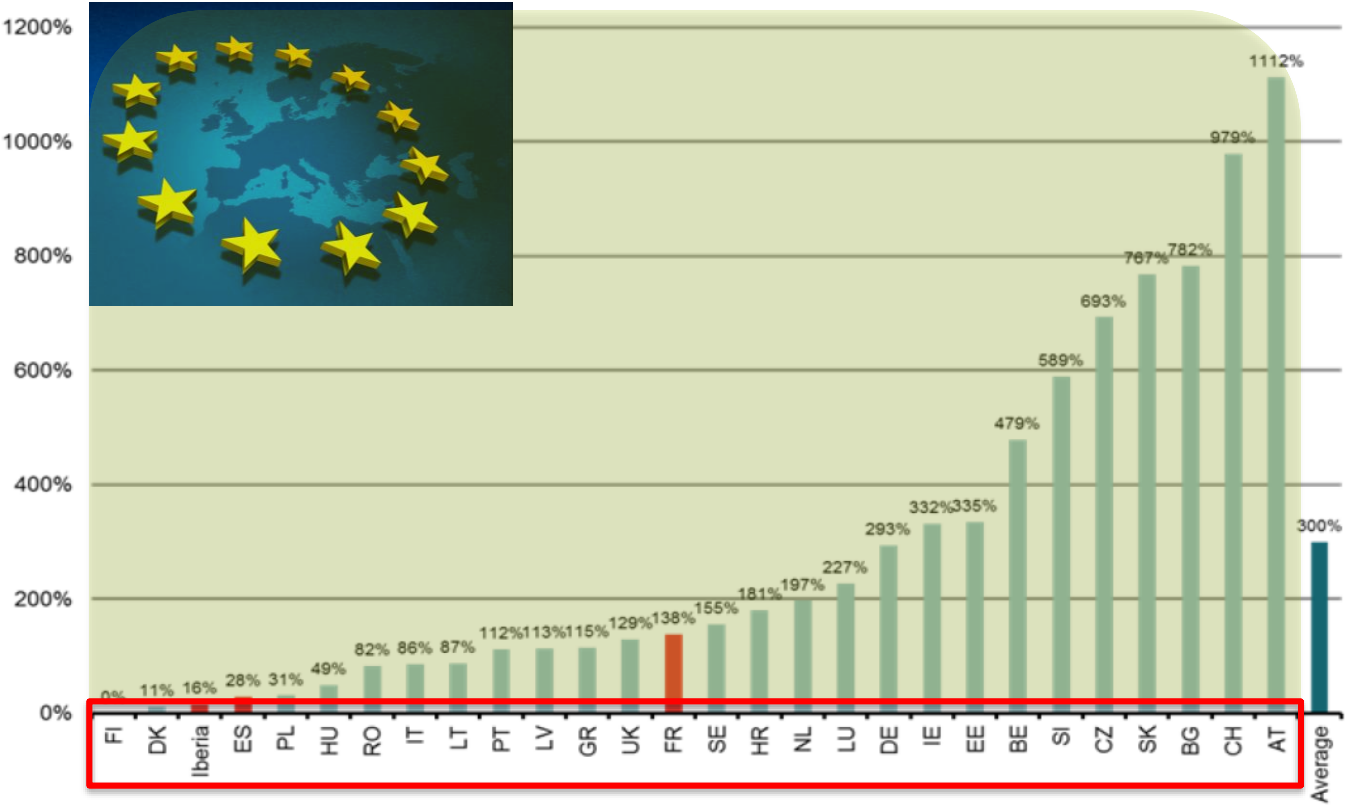
LEGEND	
price decrease compared to the balanced price configuration [EUR/MWh]	
	>2.00
	>1.00, <2.00
	<1.00, >0.50
	<0.50
	ca. 0



LEGEND	
price increase compared to the balanced price configuration [EUR/MWh]	
	>2.00
	>1.00, <2.00
	<1.00, >0.50
	<0.50
	ca. 0

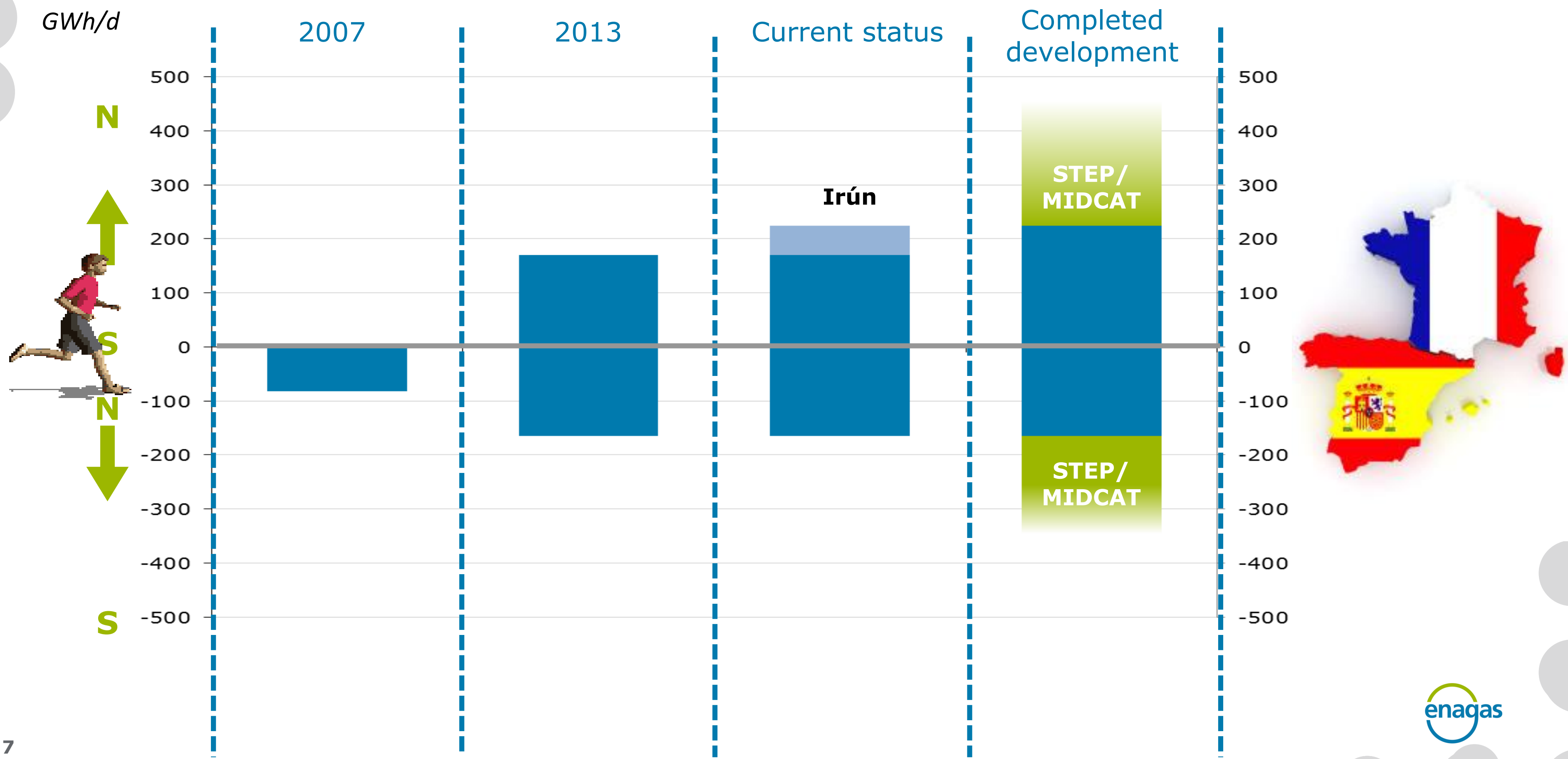
Source: TYNDP17 identification of problems, ENTSOG. Preliminary Low Infra Level results. Webinar - 18 October 2016

Interconnection capacity between European Union countries as a percentage of average gas demand



Source: Frontier Economics, based on data from ENTSO-G

Interconnection capacity between Ib. Peninsula and France



Thank you