



*Statement of producers and stakeholders on
scenarios used in the study*

ENAGÁS views

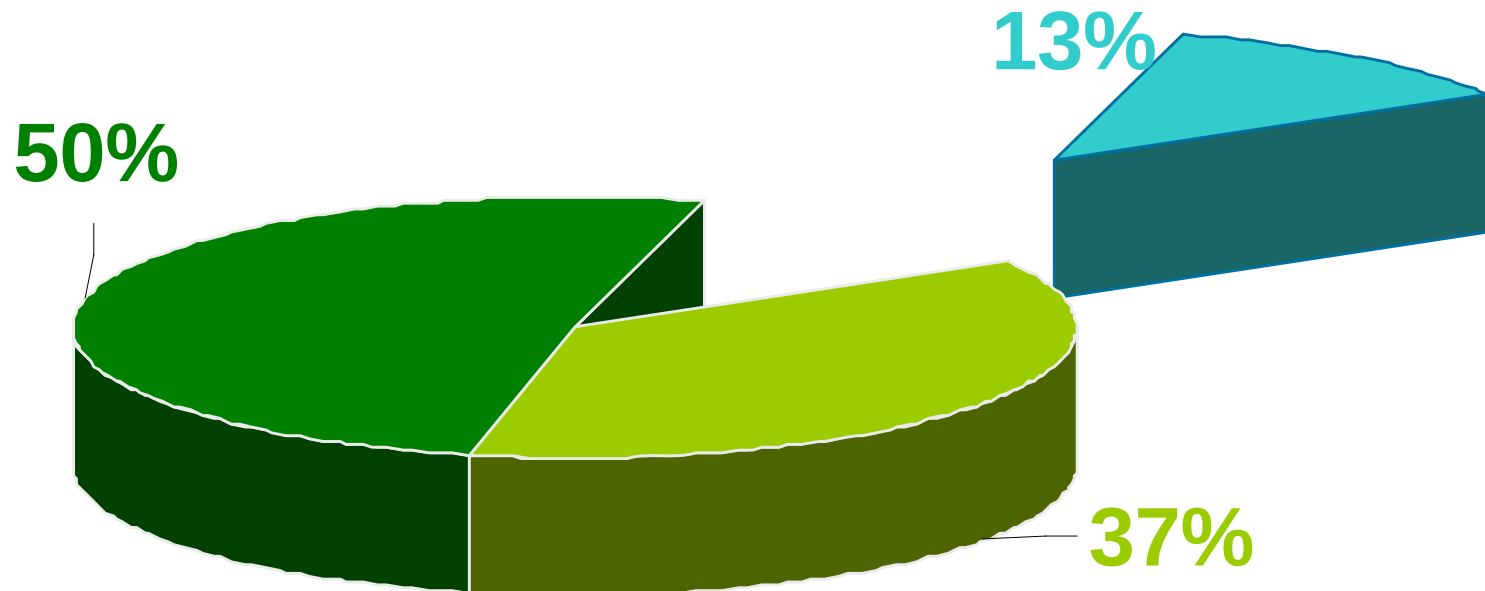
4th ERGEG Workshop on TYNDP

Luis Ignacio Parada / Enagás

14th June 2010

- LNG in Europe
- LNG in Spain and interconnection capacity
- Conclusion

Dependence on gas supplies from third countries is above 63%



■ Indigenous
Production

■ Pipeline Imports

■ LNG Imports

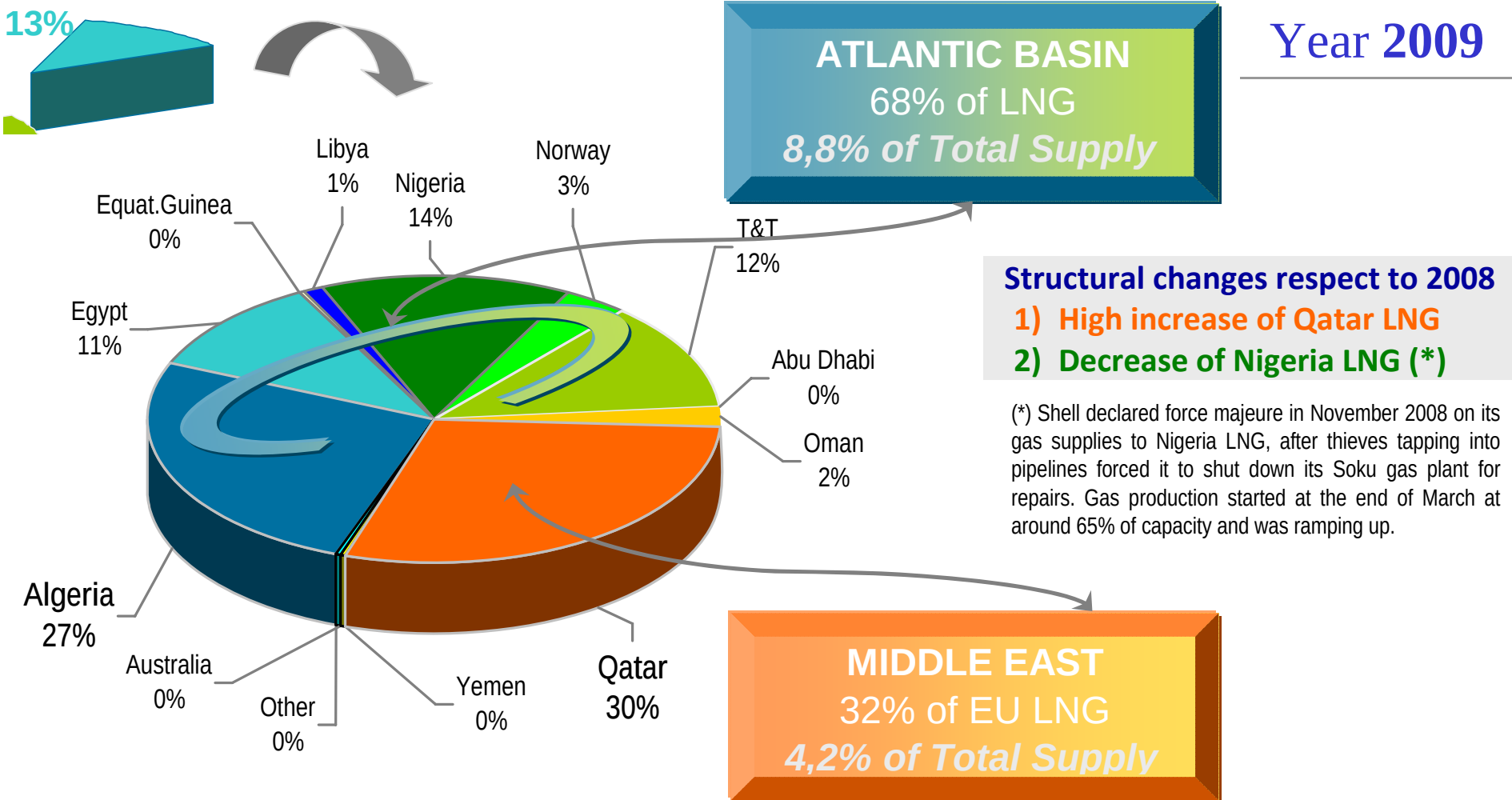
*estimates



4

EU LNG imports per exporting country

Year 2009



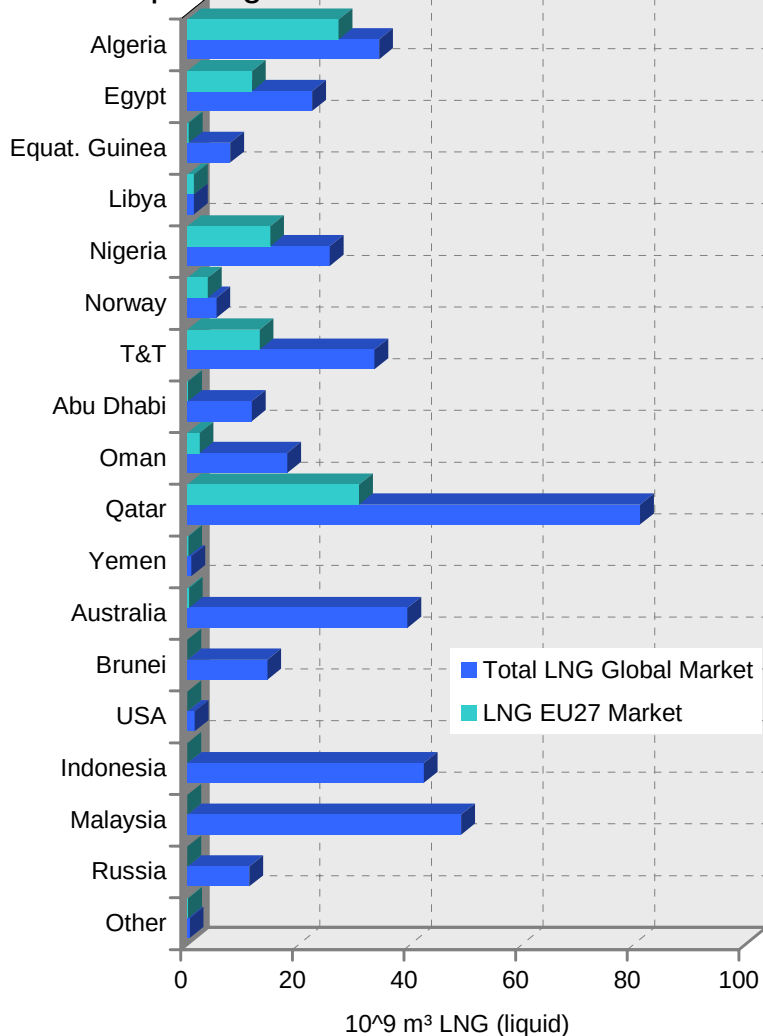
The largest LNG supplier, Qatar or Algeria, accounts for less than **4%** of total Annual Supplies

Global LNG Market vs. EU27 LNG Market



Year 2009

LNG: Exporting countries



SOURCES OF IMPORTS

SOURCES OF IMPORTS		% LNG Global Market	% EU27on LNG Global Market
Atlantic Basin	Algeria	9%	7%
	Egypt	6%	3%
	Equat. Guinea	2%	0%
	Libya	0%	0%
	Nigeria	6%	4%
	Norway	1%	1%
	T&T	8%	3%
Middle East	Abu Dhabi	3%	0%
	Oman	4%	1%
	Qatar	20%	8%
	Yemen	0%	0%
Pacific Basin	Australia	10%	0%
	Brunei	4%	
	USA	0%	
	Indonesia	11%	
	Malaysia	12%	
	Russia	3%	
	Other	0%	0%

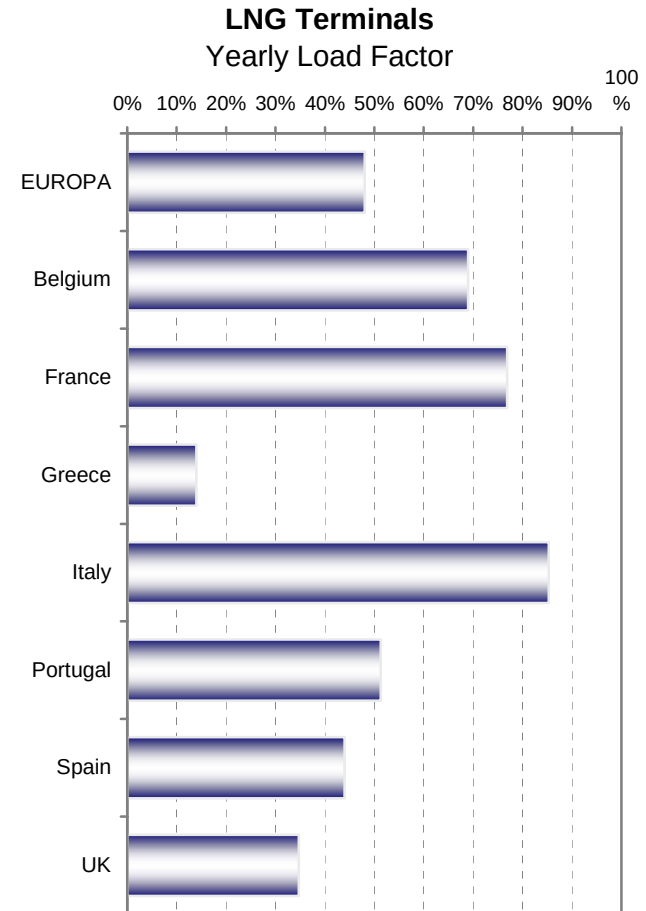
Around 26% of the total LNG Global Market is destined to EU27

Yearly LNG Terminal Load Factor

Year 2009

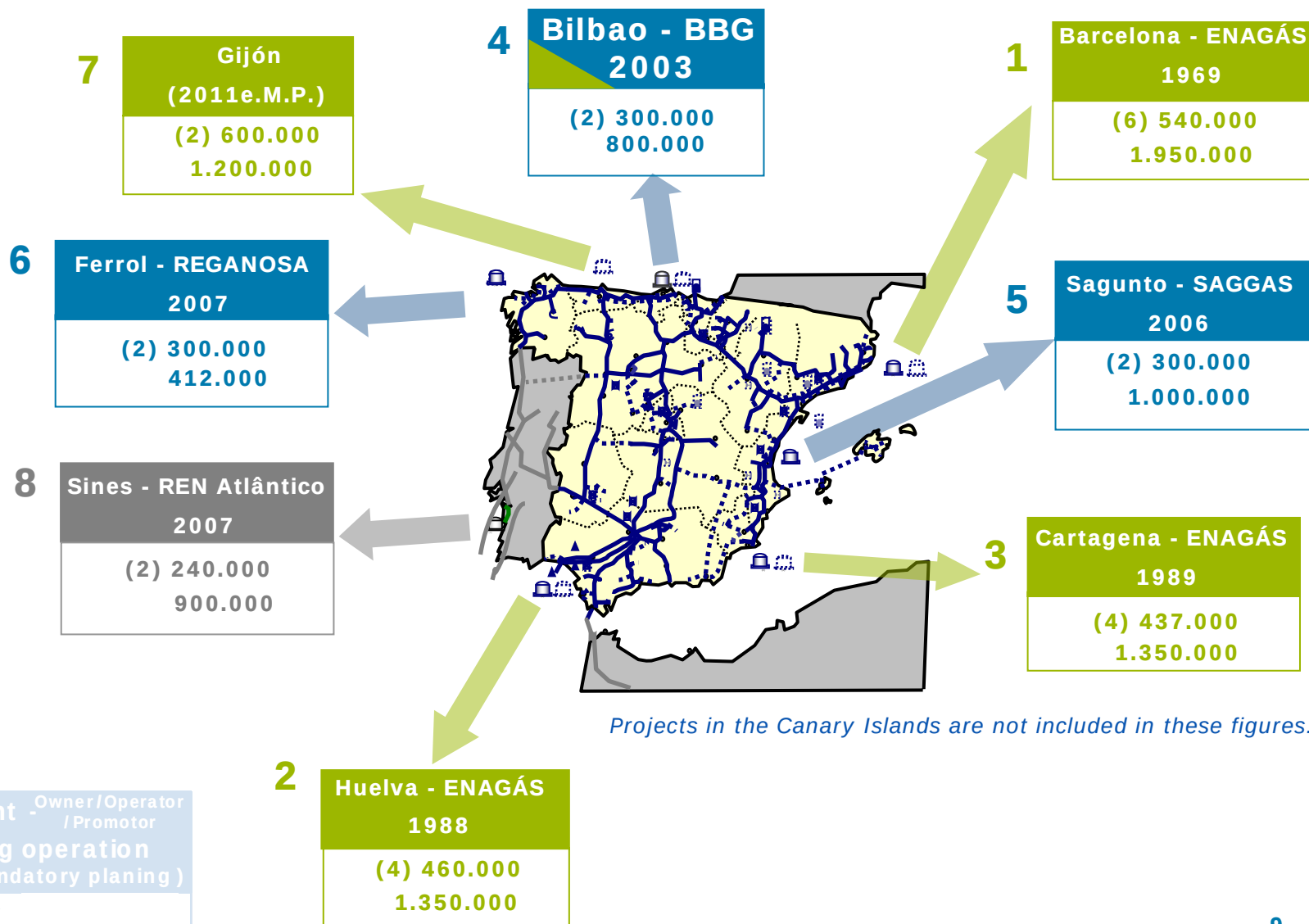
Yearly LNG Terminal Load Factor for Europe is around 48%, but differs substantially depending on each country

COUNTRY	Site	SEND-OUT Nominal Capacity billion Nm³/year	
BELGIUM	Zeebrugge	9,00	9,00
FRANCE	Fos-sur-Mer	7,00	17,00
	Montoir de Bretagne	10,00	
GREECE	Revithoussa	5,30	5,30
ITALY	Panigaglia	3,40	3,40
PORTUGAL	Sines	5,50	5,50
SPAIN	Barcelona	17,10	60,10
	Huelva	11,80	
	Cartagena	11,80	
	Bilbao	7,00	
	Reganosa	3,60	
	Sagunto	8,80	
UK	Isle of Grain	13,00	29,50
	Dragon LNG	6,00	
	South Hook	10,50	
EU27		130 bcm	



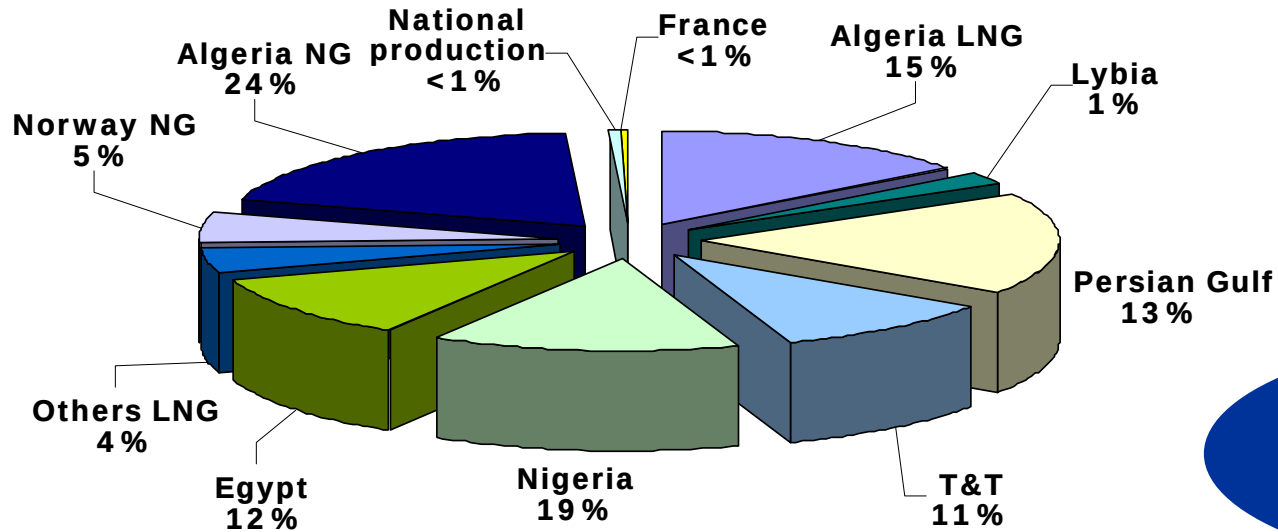
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LNG Plants in the Iberian Peninsula

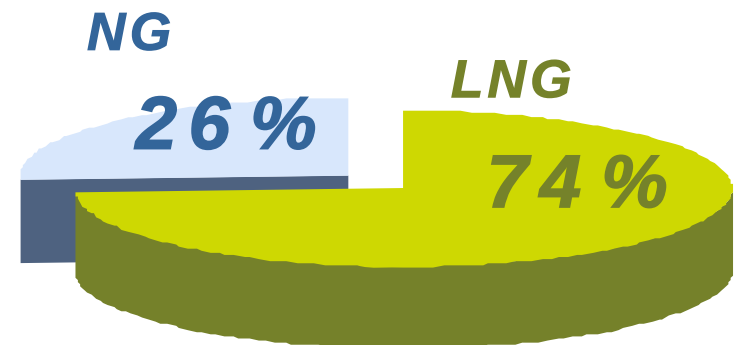
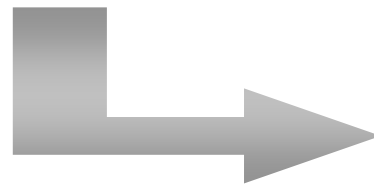


LNG plant	Owner/Operator / Promotor
Starting operation	(Real/ Mandatory planing)
Current (n°tk) LNG	
Storage (m³)	
Current Send out	
(m³/nb)	

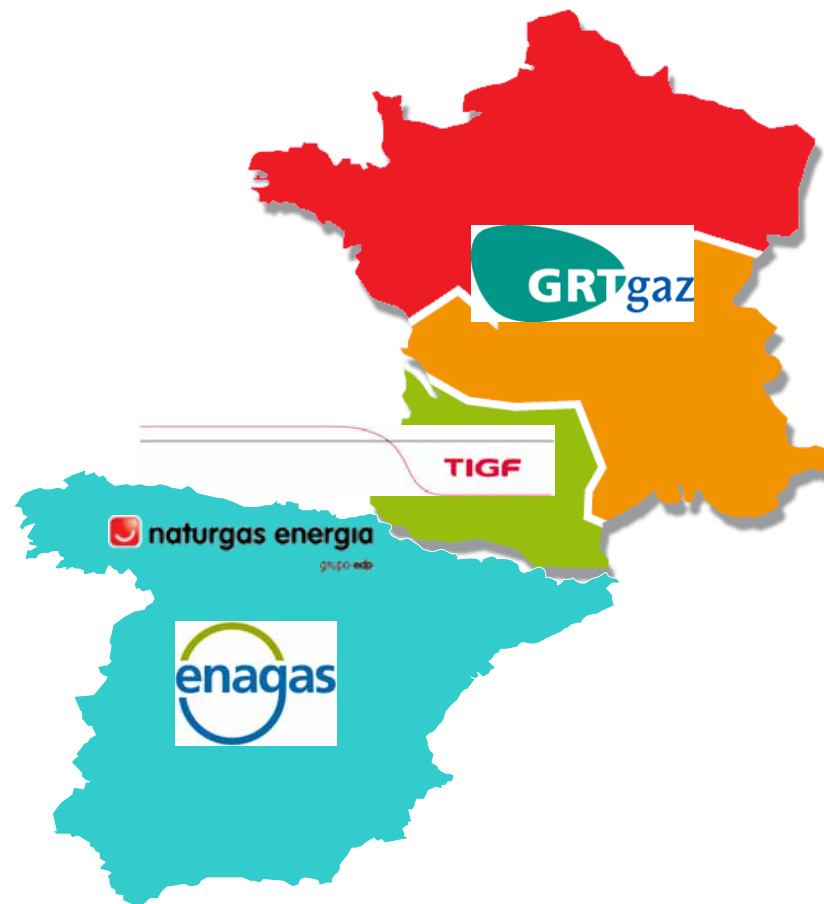
Supply Diversification 2009



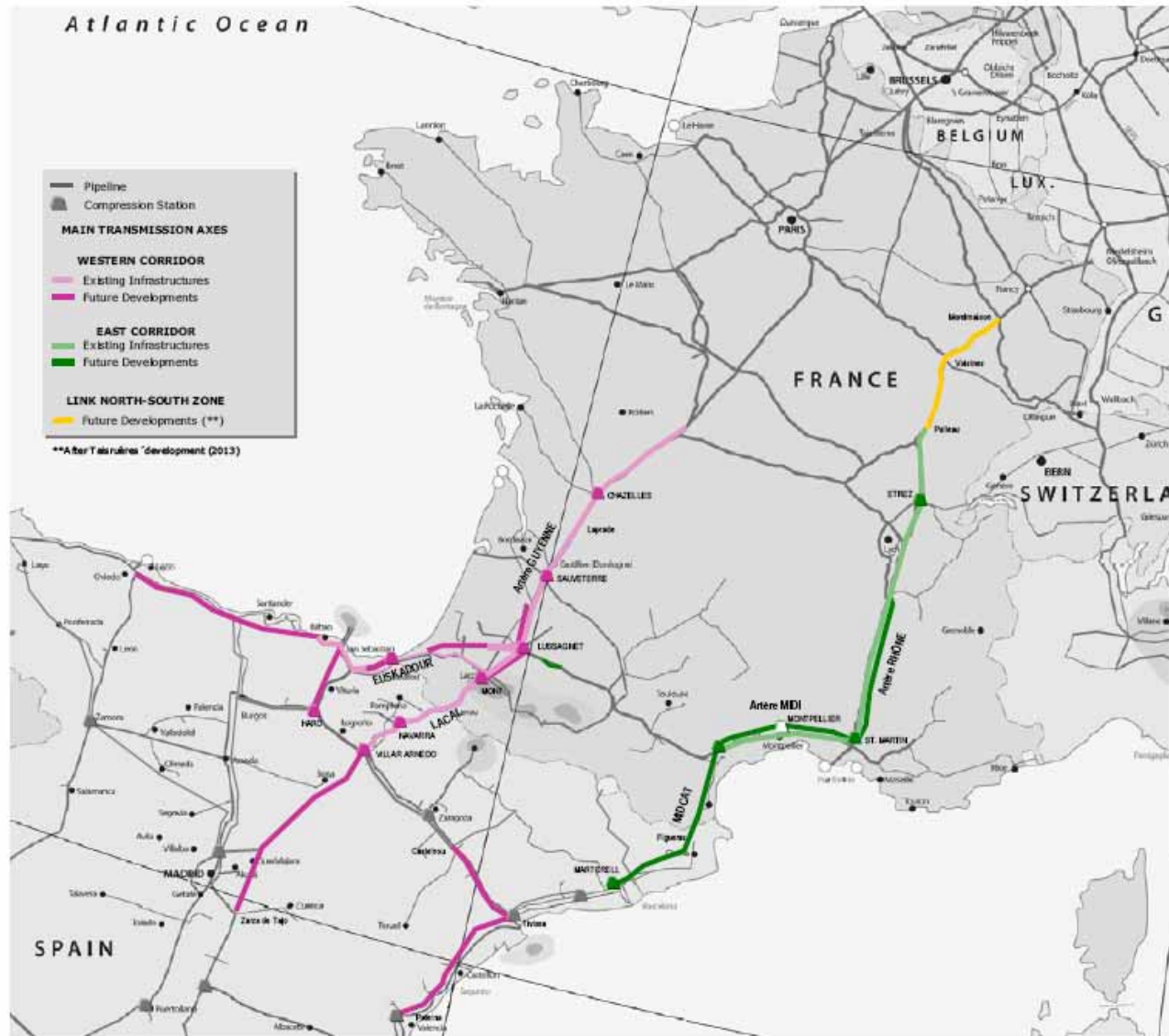
**2009 supplies
to Spain 412
TWh**



Coordination of 4 TSOs (Enagás, GRTgaz, Naturgás y TIGF) for the commercialisation of 4 different balancing zones through a single process.

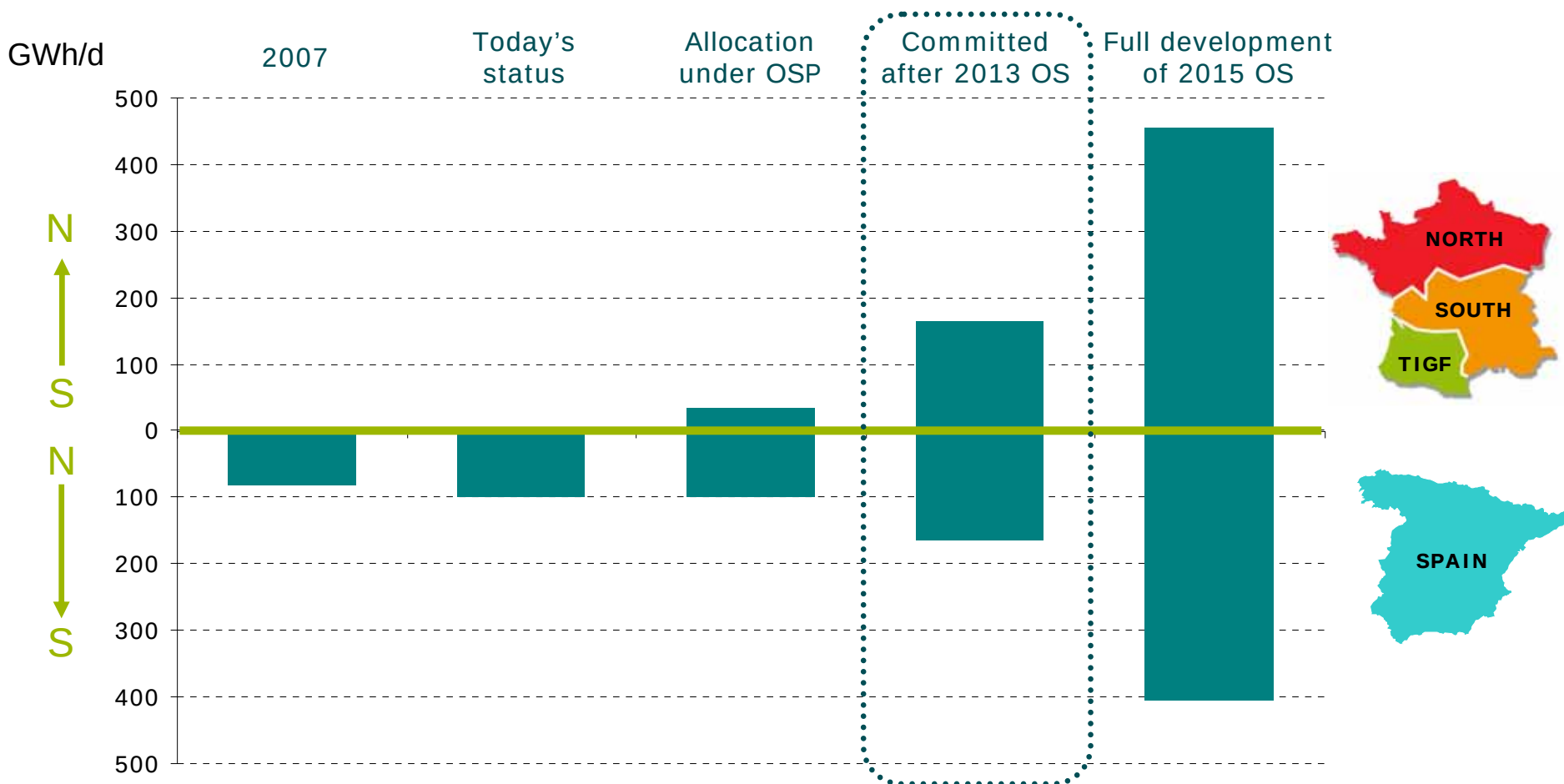


Interconnection Spain – France: Infrastructures



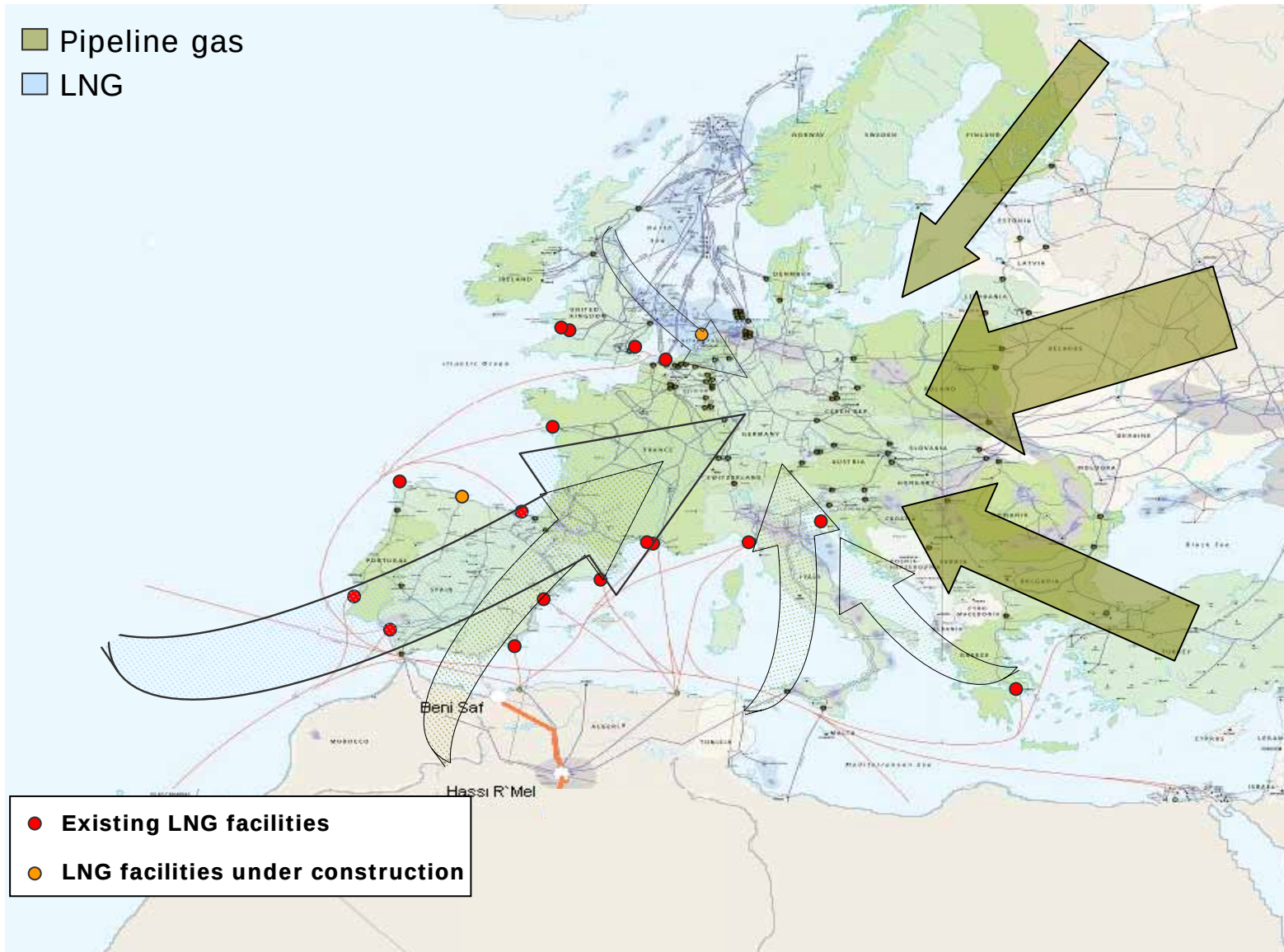
Interconnection capacity Spain - France

Physical capacities



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EU potential import flows





Thank you for your kind attention

Questions?