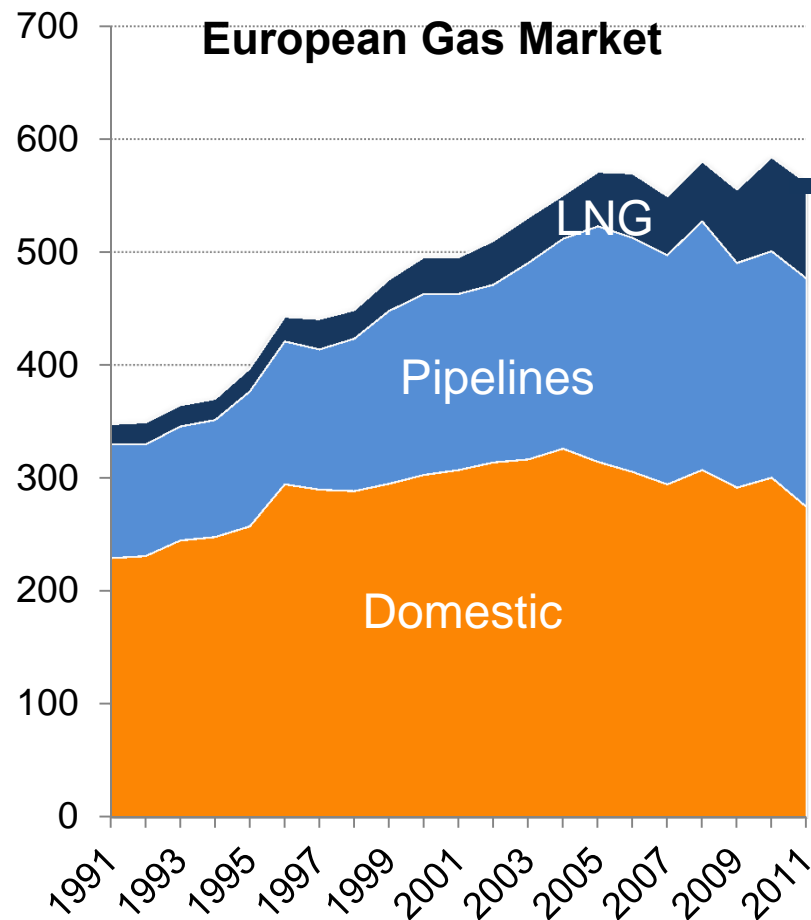


**The 2012 Autumn Gas Conference
Czech Gas Association
Jérôme Ferrier, President IGU**

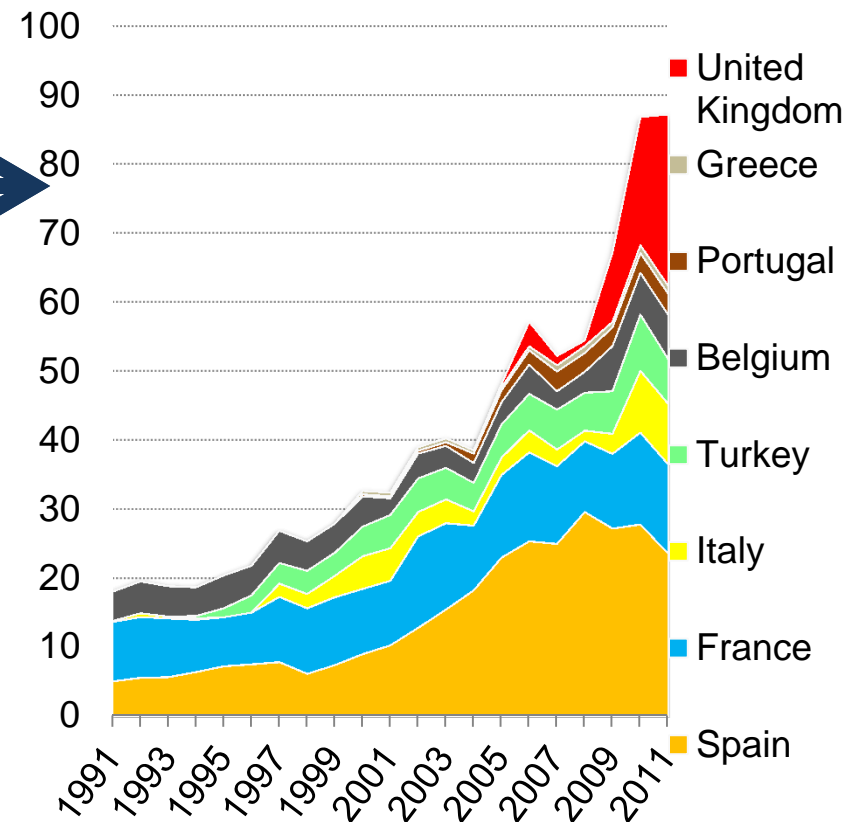
**Security of supply and liberalization :
The role of infrastructures**

CGA 6 November 2012

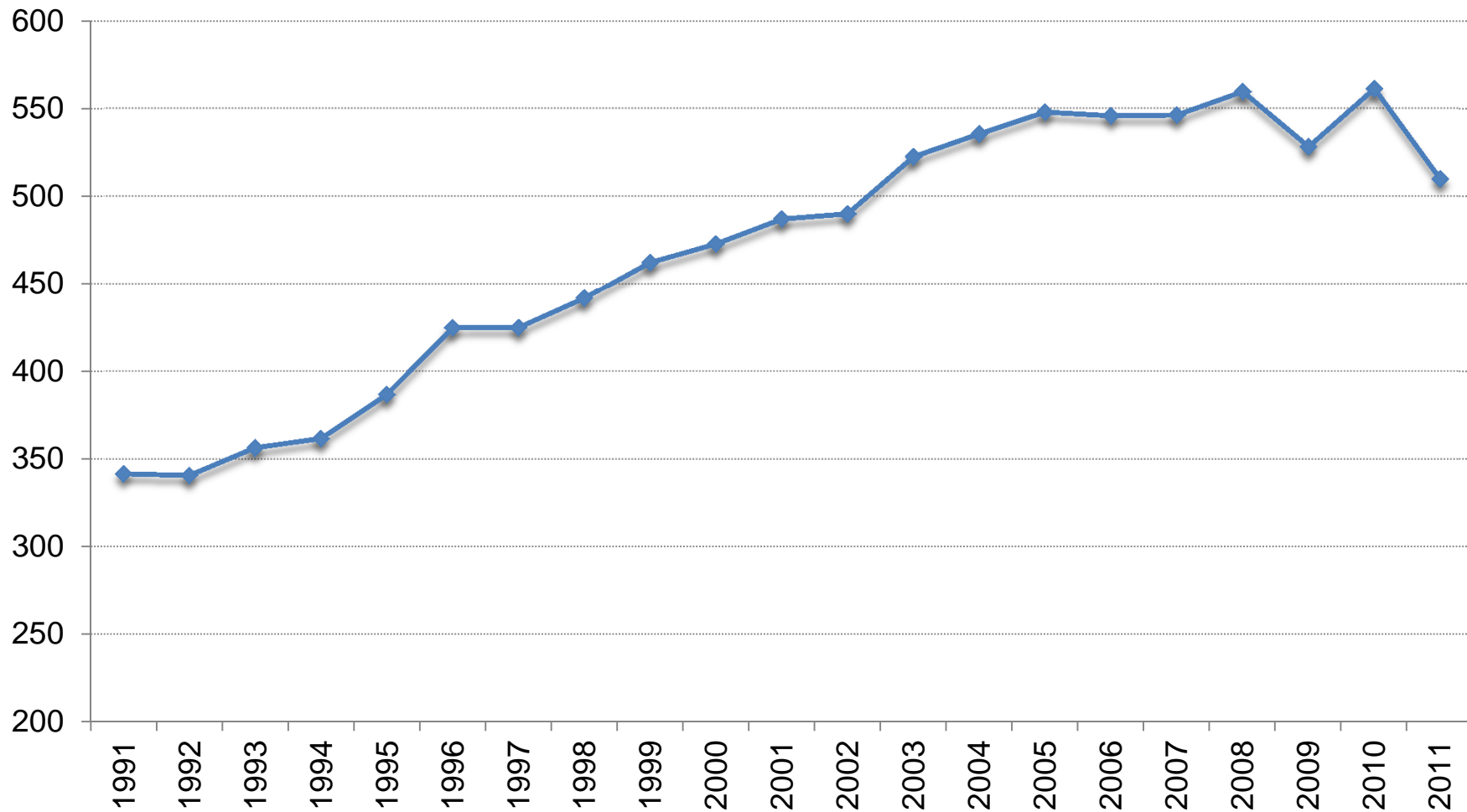
European Gas Supply Bcm



European LNG Import

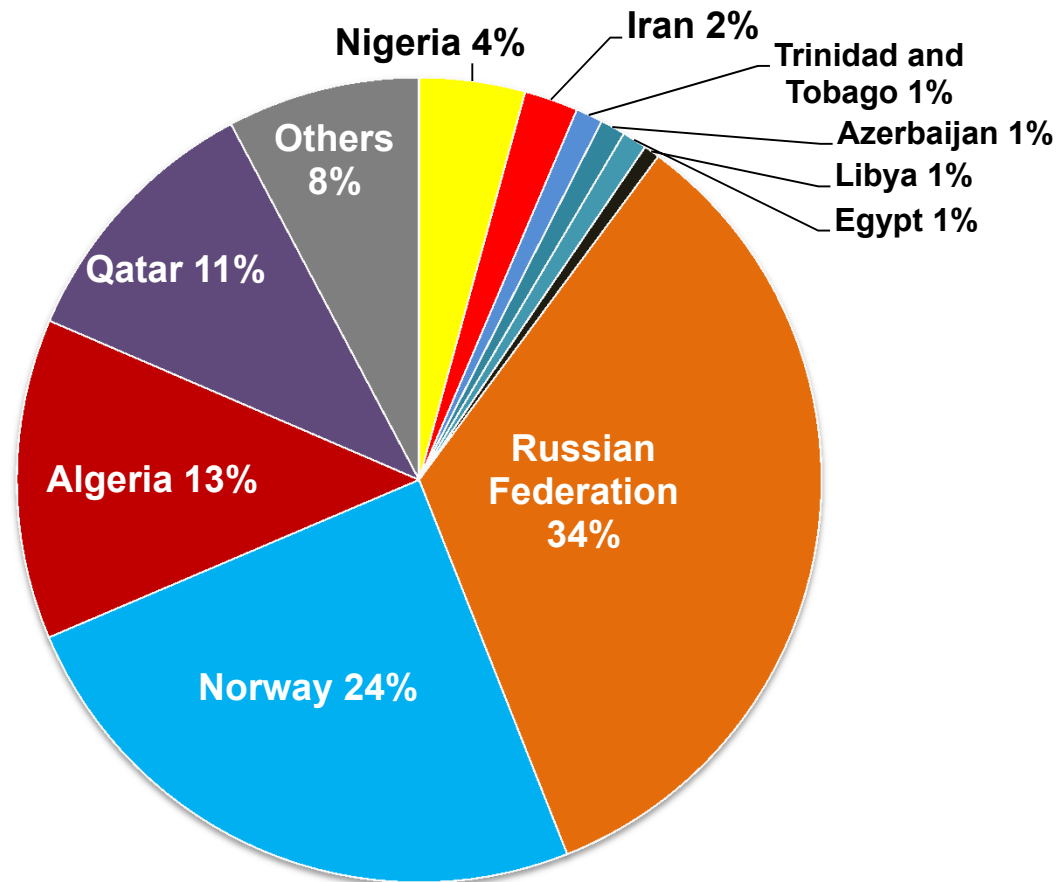


Consumption in Europe (Bcm/y)



Source: IEA

EU imports by origin country in 2011



Source: IEA

Share of Russian gas imports in the EU 2011 (Bcm)



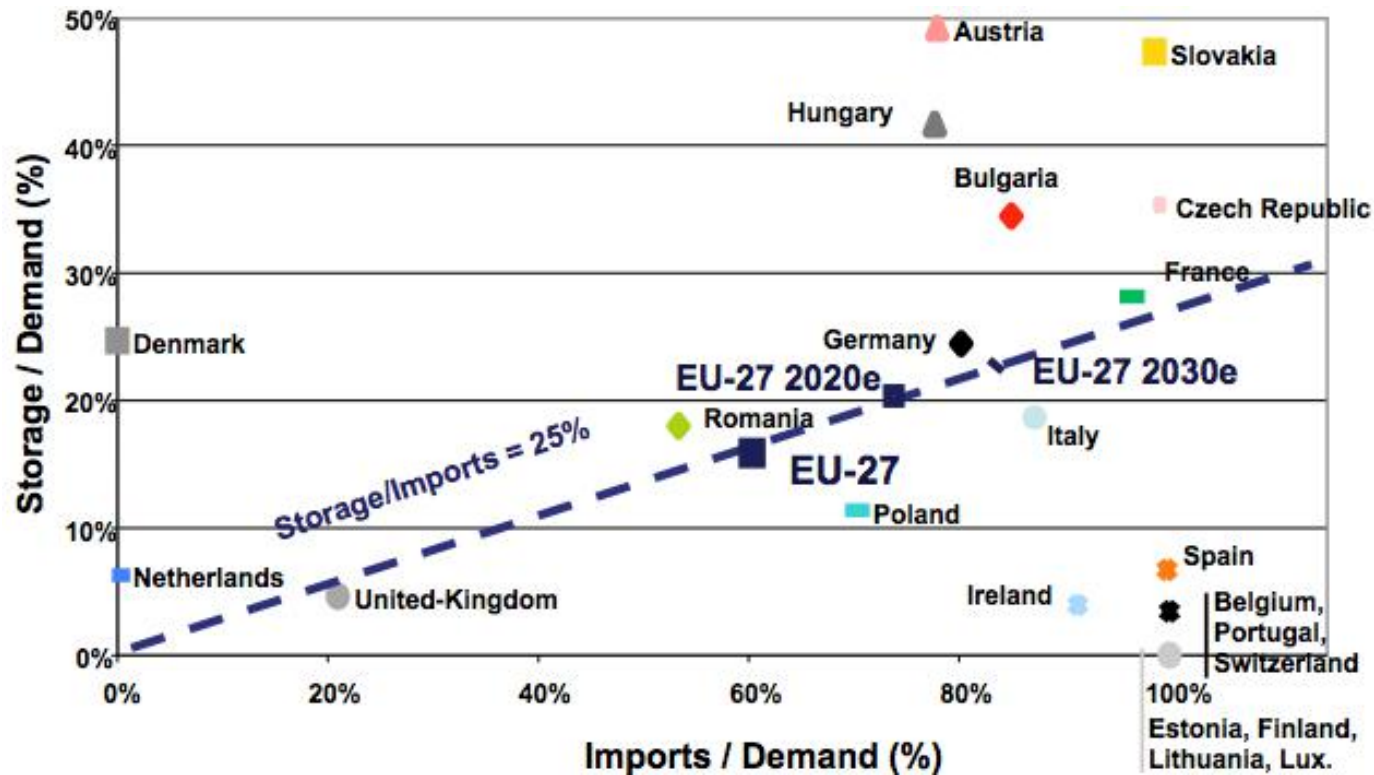
Country	Consumption	Imports from Russia	% Russian gas
Finland	3,6	3,6	100%
Bulgaria	2,9	2,5	87%
Slovakia	6,2	5,3	85%
Lithuania	3,4	2,9	85%
Czech Republic	8,4	6,9	82%
Poland	15,4	9,3	60%
Greece	4,5	2,6	58%
Hungary	10,2	5,7	56%
Austria	9,5	4,9	52%
Belgium	16,1	7,4	46%
Germany	72,5	30,8	42%
Italy	71,3	15,4	22%
France	40,3	8,6	21%
Romania	13,8	2,6	18%
Netherlands	38,1	4,0	10%

Source: BP Statistical Review 2012

CGA 6 November 2012

5

Contribution of storage to Security of Supply in Europe



Source : GSE

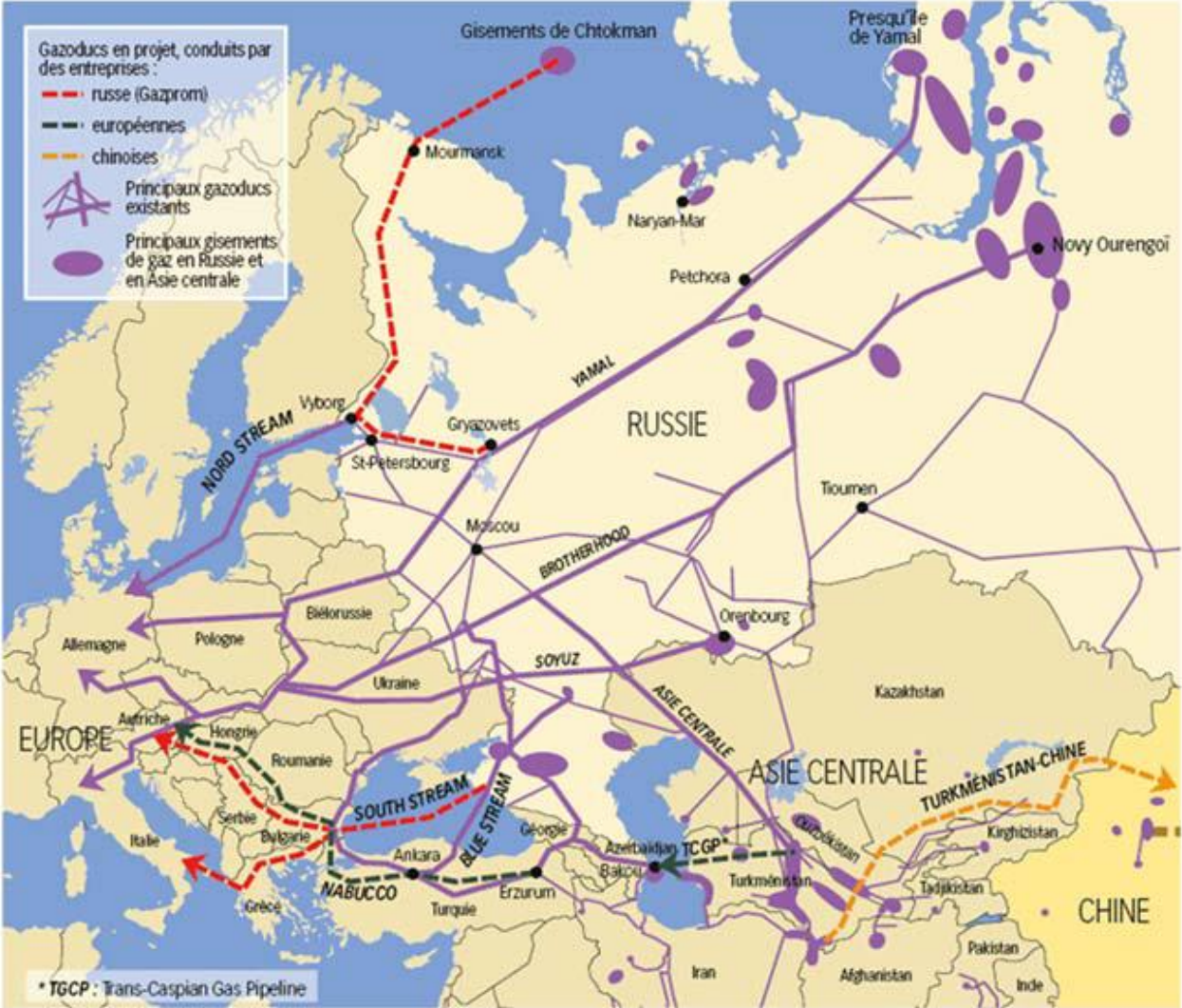
Main conventional resources from the Caspian area



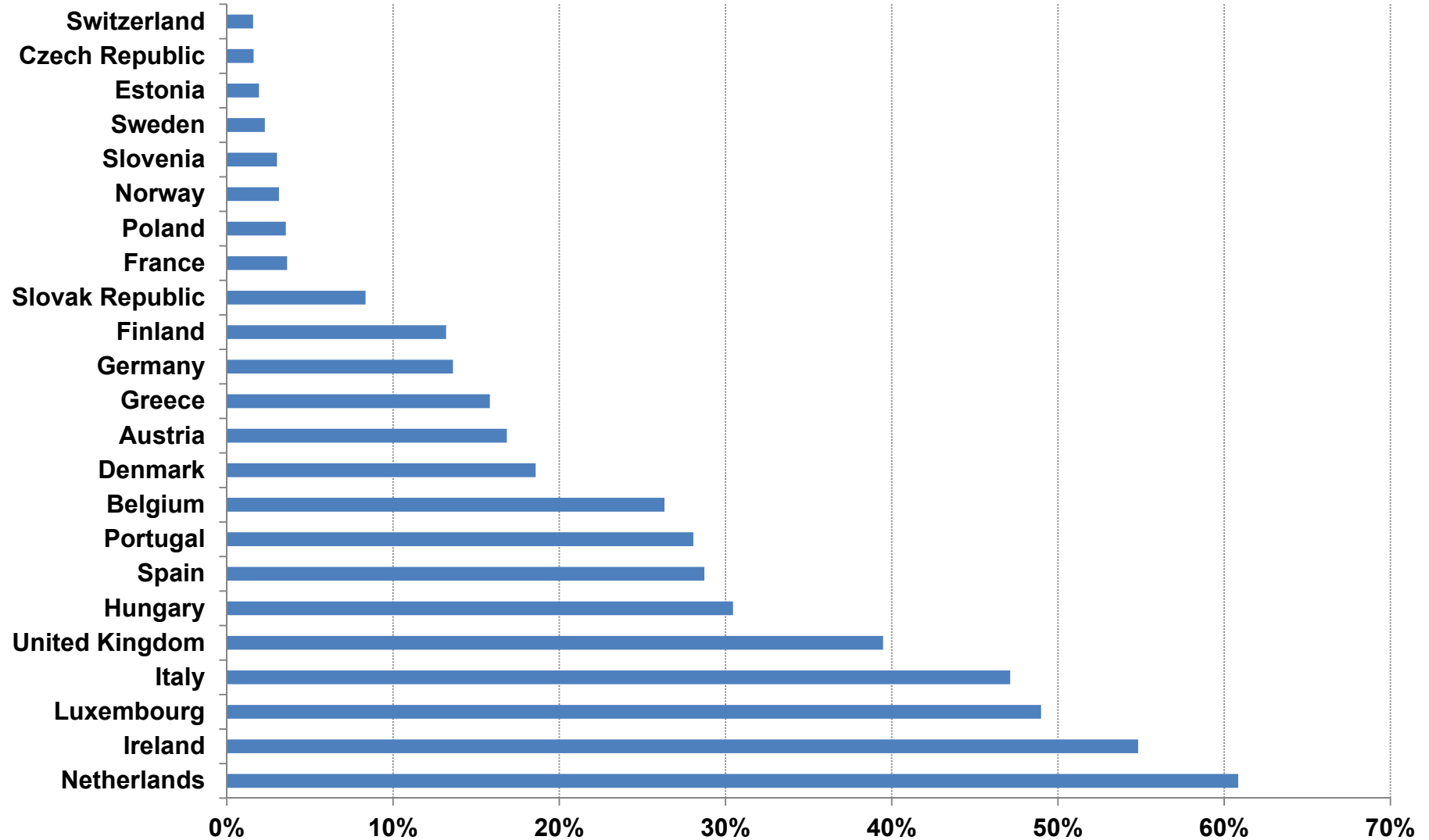
	PROVED RESERVES (Bcm)	R/P	PRODUCTION (Bcm/y)	CONSUMPTION (Bcm/y)	Δ (Bcm/y)
Iran	33 090	218	151,8	153,3	1,5
Turkmenistan	24 300	408	59,5	25	-34,5
Kazakhstan	1 880	97	19,3	9,2	-10,1
Azerbaijan	1 270	86	14,8	8,2	-6,6

Source: BP Statistical Review 2012

Gas pipelines to Europe



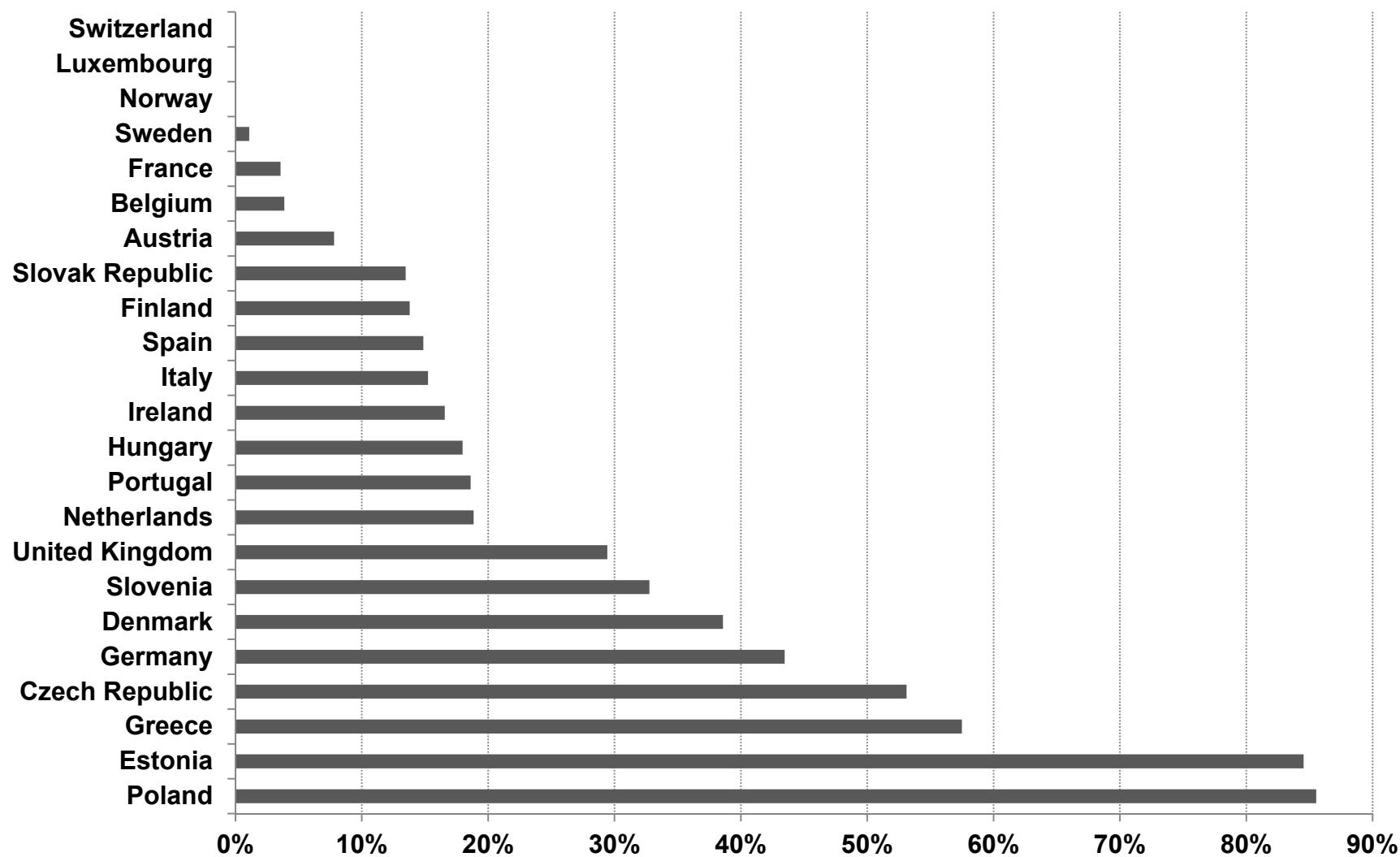
Share of gas in electricity generation in Europe



Source: IEA 2011

CGA 6 November 2012

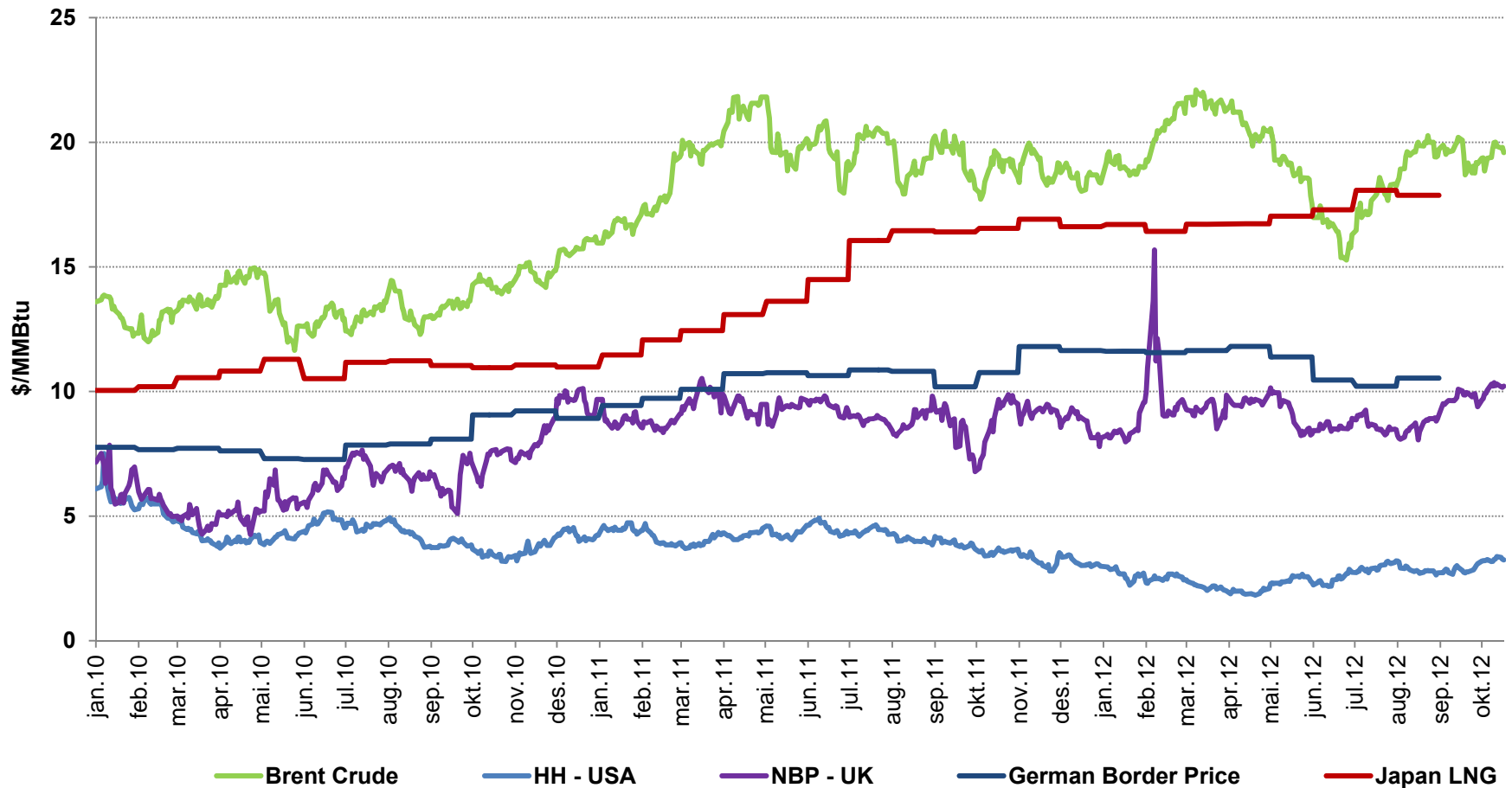
Share of coal in electricity generation in Europe



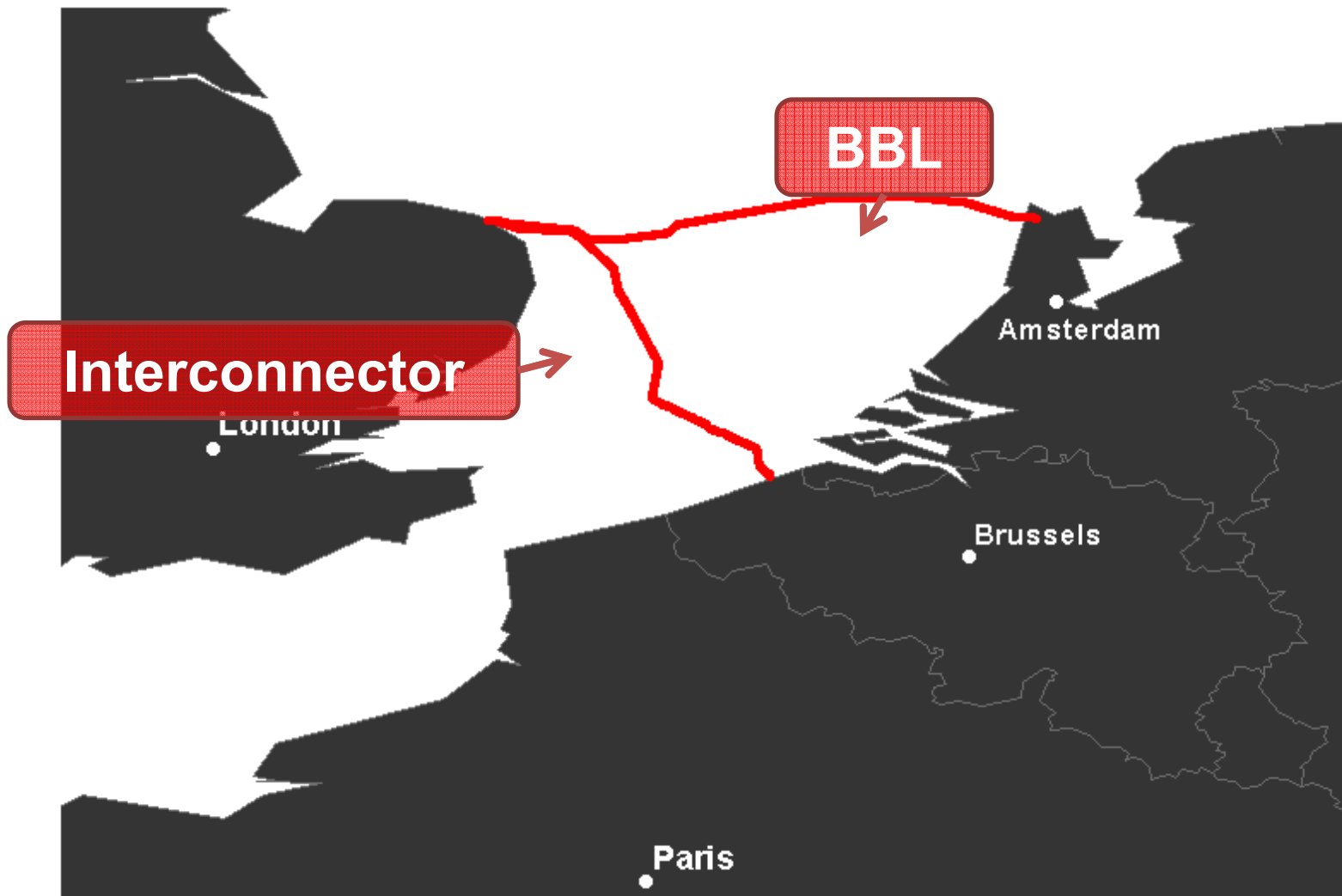
CGA 6 November 2012

Source: IEA 2011

Drivers for arbitraging between gas pipelines and LNG (\$/MMBtu)



Enhancing the security of supply the UK-continent gas pipelines



Thank you for your attention