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

Security of supply and liberalization :
The role of infrastructures
European Gas Supply
Bcm

European LNG Import

Source: IEA

CGA 6 November 2012
Consumption in Europe (Bcm/y)

Source: IEA

CGA 6 November 2012
EU imports by origin country in 2011

- Russian Federation: 34%
- Norway: 24%
- Algeria: 13%
- Qatar: 11%
- Others: 8%
- Nigeria: 4%
- Iran: 2%
- Trinidad and Tobago: 1%
- Azerbaijan: 1%
- Libya: 1%
- Egypt: 1%

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

Source: BP Statistical Review 2012
Contribution of storage to Security of Supply in Europe

Source: GSE

IGU - INTERNATIONAL GAS UNION
UNION INTERNATIONALE DU GAZ
Main conventional resources from the Caspian area

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

Source: BP Statistical Review 2012
Gas pipelines to Europe
Share of gas in electricity generation in Europe

Source: IEA 2011
Share of coal in electricity generation in Europe

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