

Decarbonising the Gas Infrastructure in CEE & SEE with a Sustainable Recovery

9 July 2020



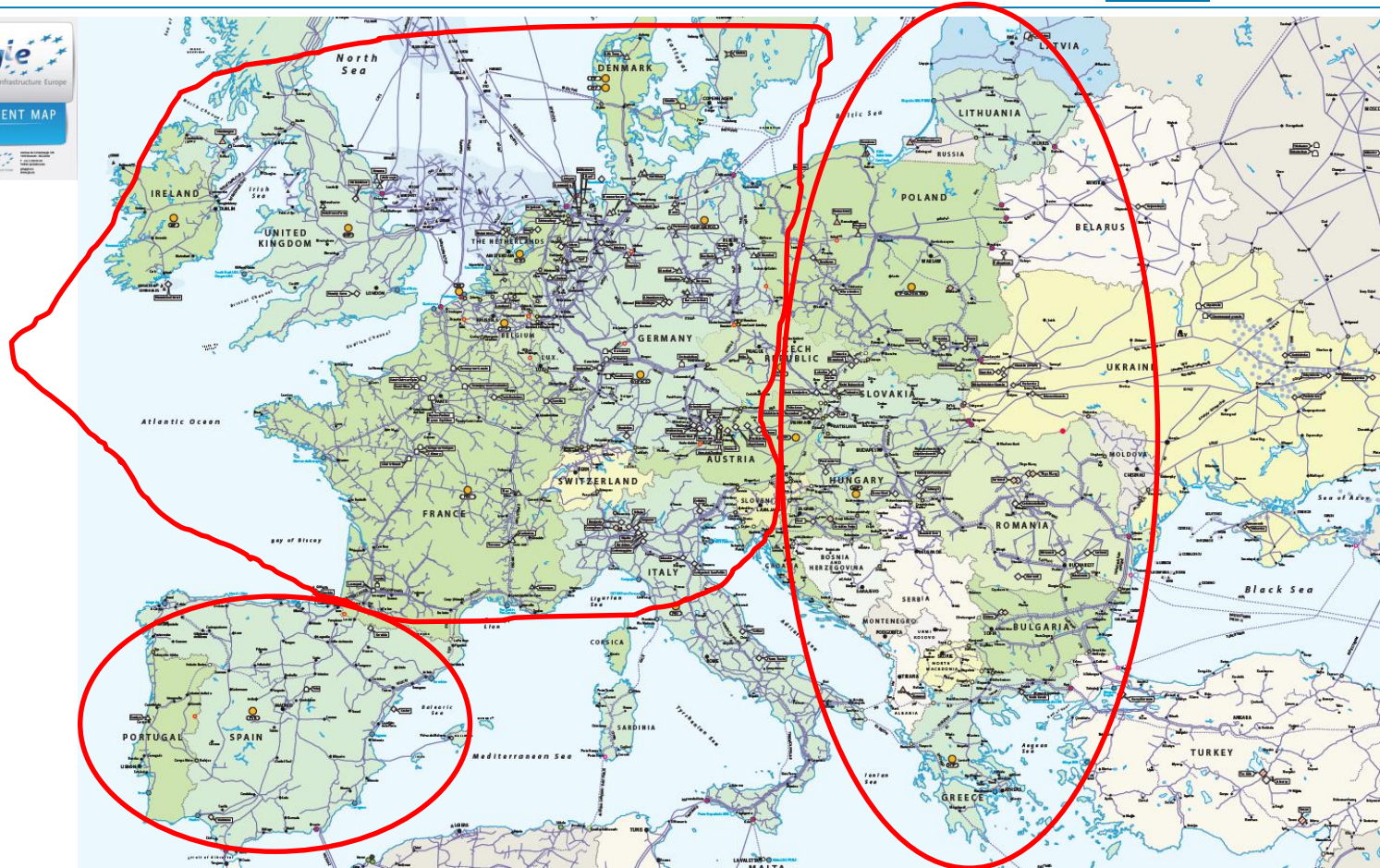
Francisco de la Flor

Director

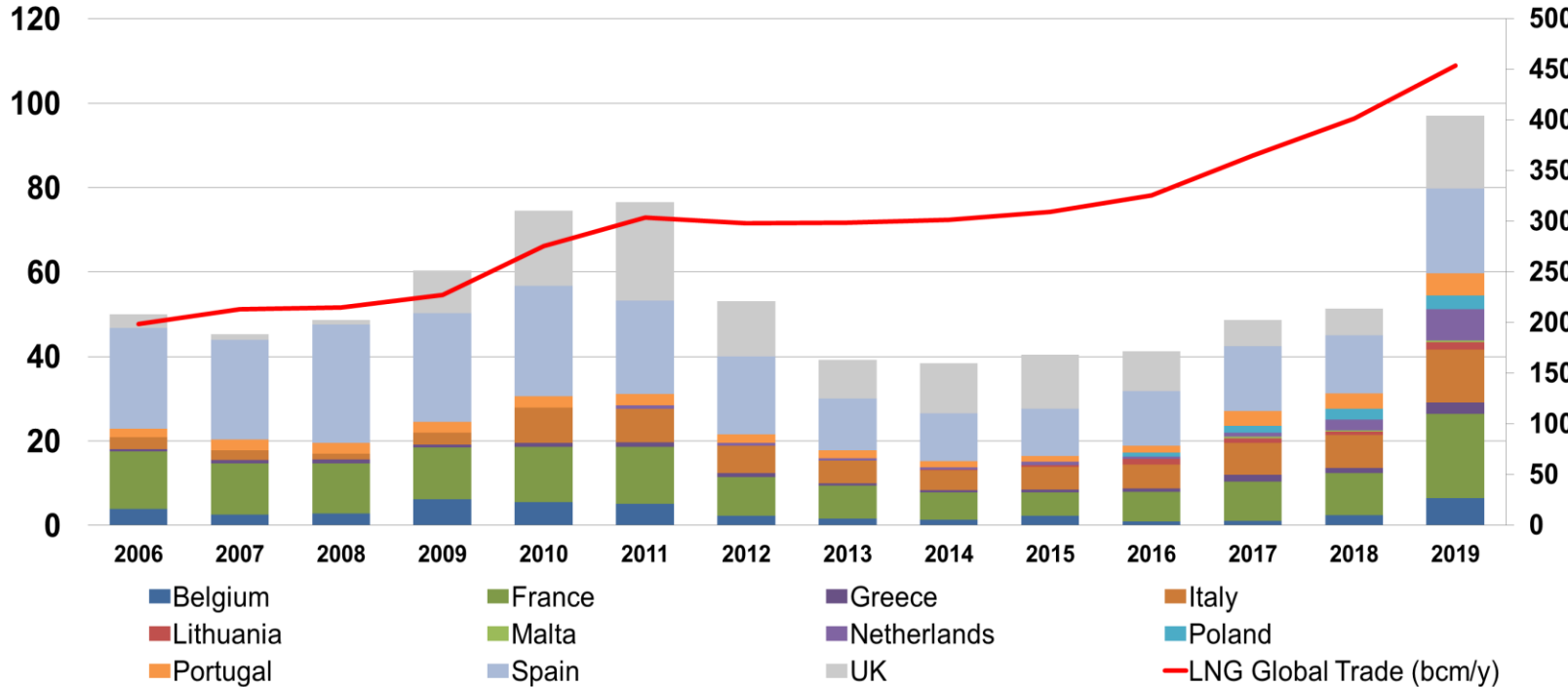
International Organisations



One Single and Integrated Market for all Europeans



LNG Imports (bcm) by EU country [left axis] and Global LNG Trade [right axis]



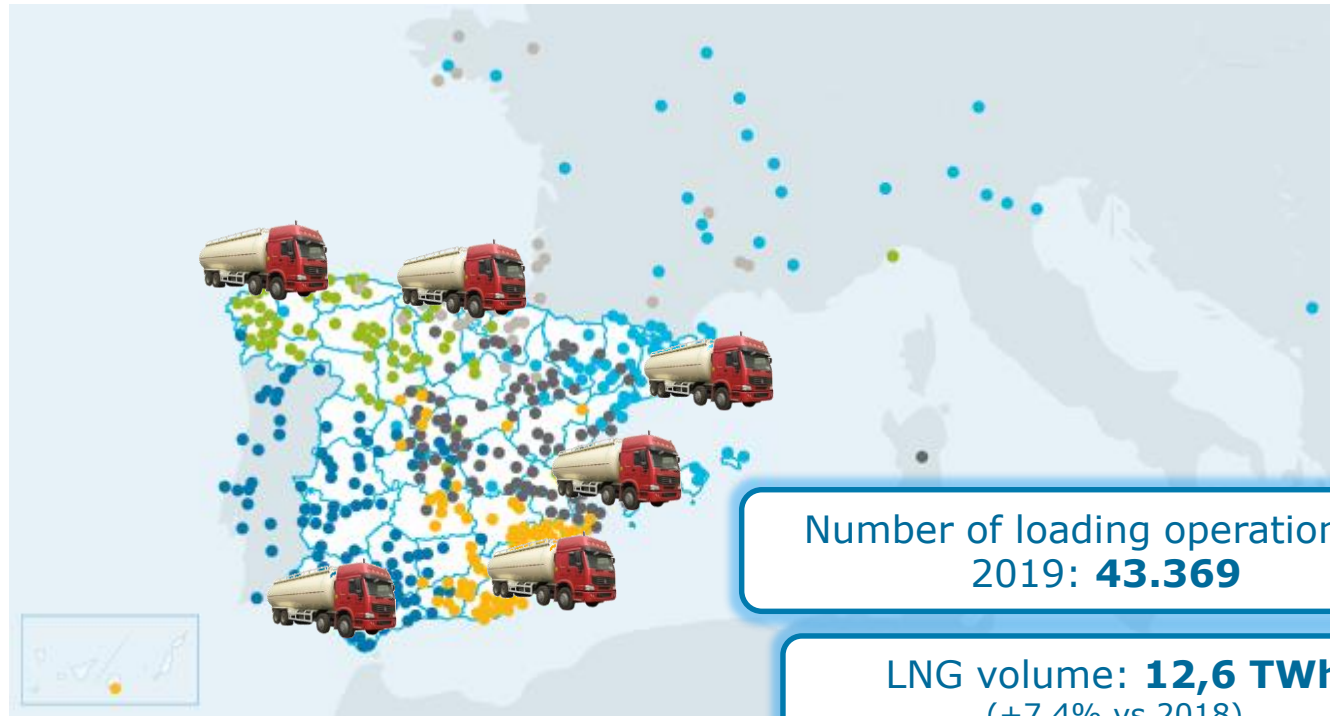
Truck loading: Destinations by LNG terminals of origin

1,344 total destinations

(+179 new destinations in 2019 vs 2018)

102 destinations abroad

(+12 new destinations abroad in 2019 vs 2018)



Number of loading operations in 2019: **43.369**

LNG volume: **12,6 TWh**
(+7,4% vs 2018)

● Barcelona ● Cartagena ● Huelva ● Mugardos ● Bilbao ● Sagunto

| Country | Company | Project Name | Status | Year |
|---------|-----------------|--------------|-----------|------|
| Belgium | Fluor | Belgium LNG | Operating | 2010 |
| Denmark | Novartis Energy | Denmark LNG | Operating | 2010 |
| France | EDF | France LNG | Operating | 2010 |
| Germany | Uniper | Germany LNG | Operating | 2010 |
| Italy | Eni | Italy LNG | Operating | 2010 |
| Spain | Enagás | Spain LNG | Operating | 2010 |
| UK | Uniper | UK LNG | Operating | 2010 |



Norwegian Sea

| Country | Company | Project Name | Status | Year |
|-------------|---------|-----------------|-----------|------|
| Poland | Uniper | Poland LNG | Operating | 2010 |
| Portugal | Uniper | Portugal LNG | Operating | 2010 |
| Romania | Uniper | Romania LNG | Operating | 2010 |
| Slovenia | Uniper | Slovenia LNG | Operating | 2010 |
| Sweden | Uniper | Sweden LNG | Operating | 2010 |
| Switzerland | Uniper | Switzerland LNG | Operating | 2010 |
| Turkey | Uniper | Turkey LNG | Operating | 2010 |
| Ukraine | Uniper | Ukraine LNG | Operating | 2010 |

STORA

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| Denmark | Novartis Energy | Denmark LNG | Operating | 2010 |
| France | EDF | France LNG | Operating | 2010 |
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AGSI

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One Single and Integrated Market for all Europeans



*“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”*

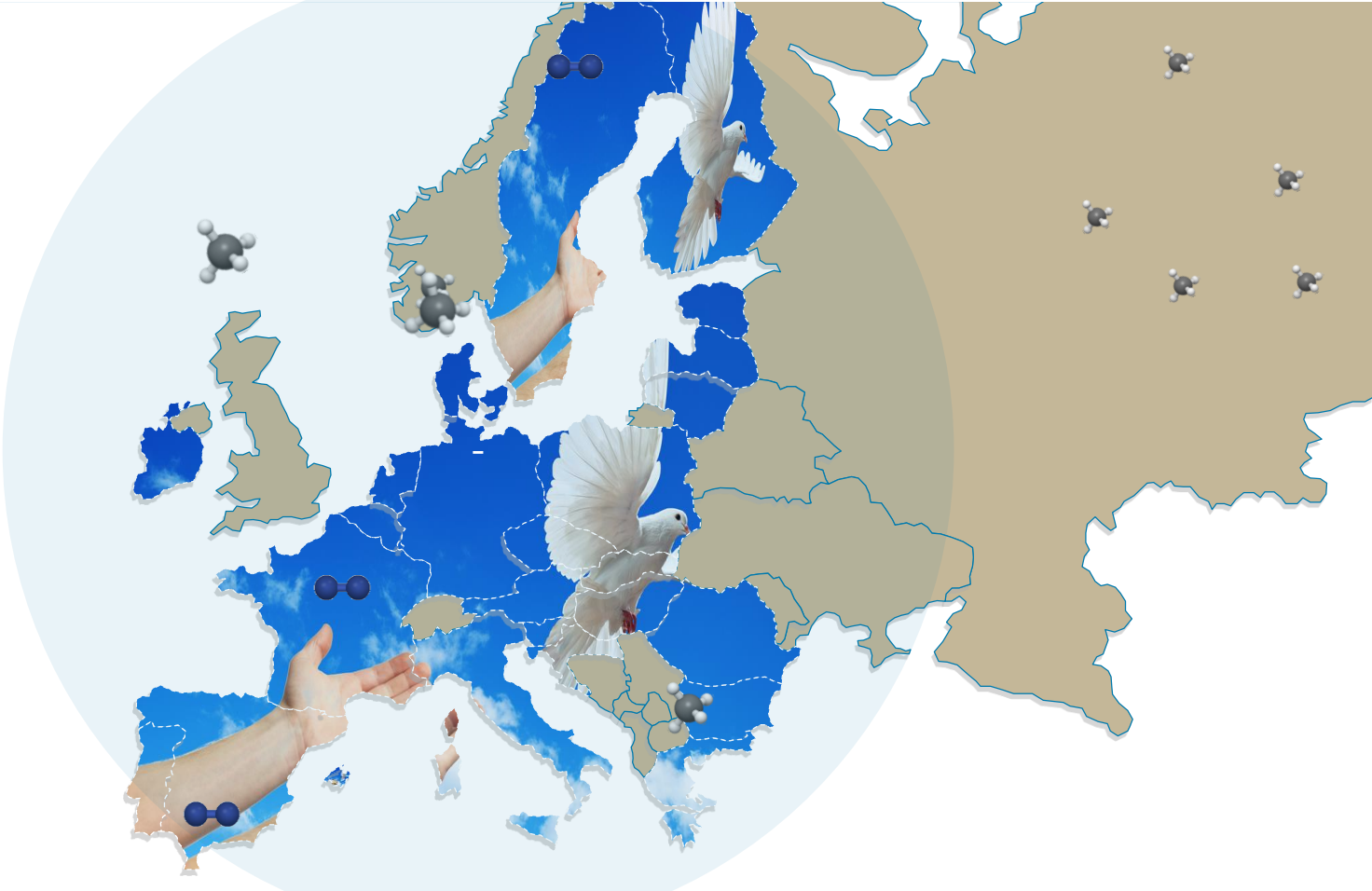
Source: EC Communication on the Energy Union 2015

...but the EU Green Deal is coming

- ... how many Gas Infrastructure Systems?
- ... how many Gas Markets?
- ... how many GOs Types?

Keep an Integrated Market
Avoid Market Fragmentation

A Truly Integrated Market for All EU Consumers



Thank you for
your attention

