

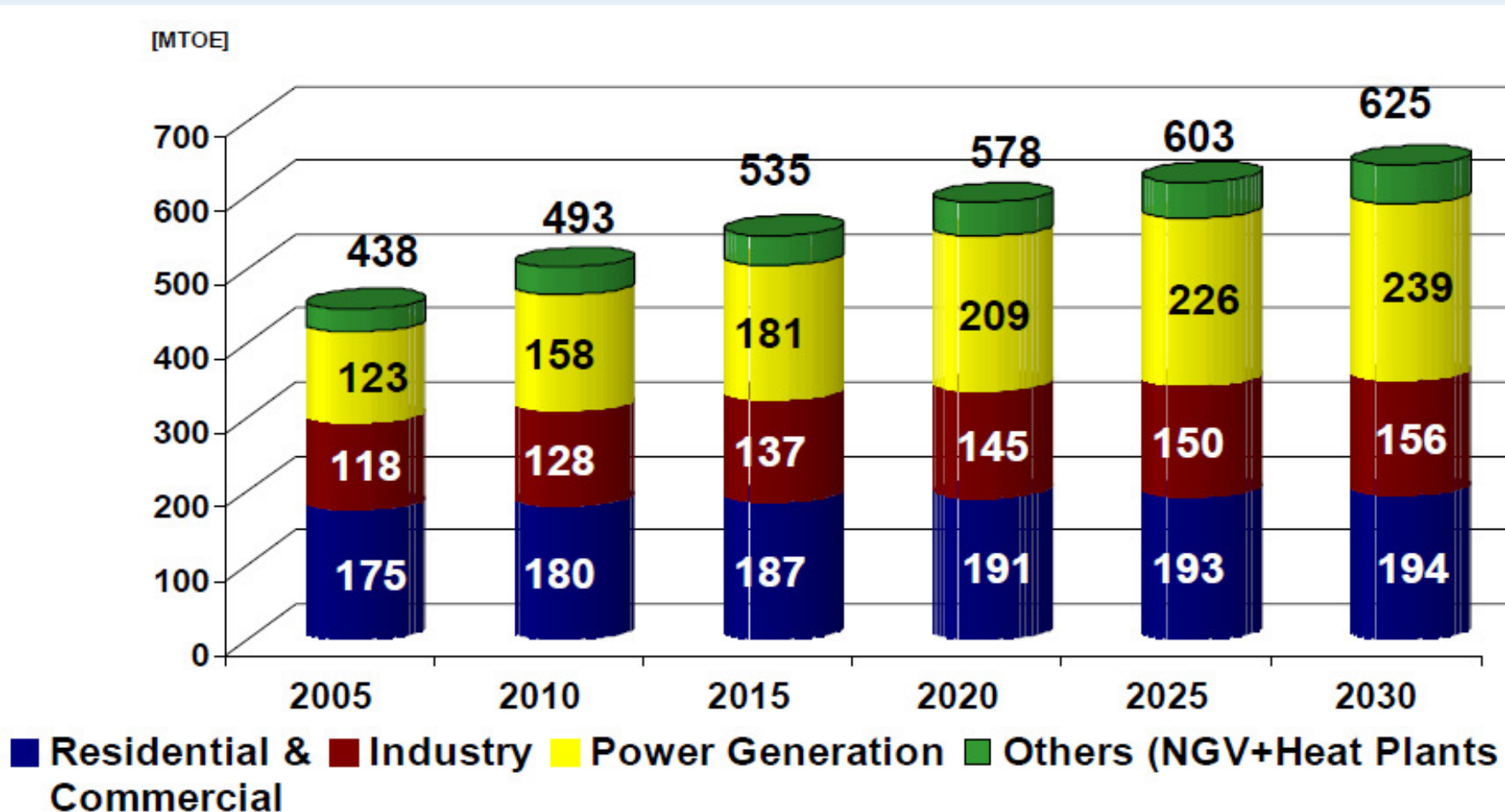


Security of supply and competition

Walter Boltz

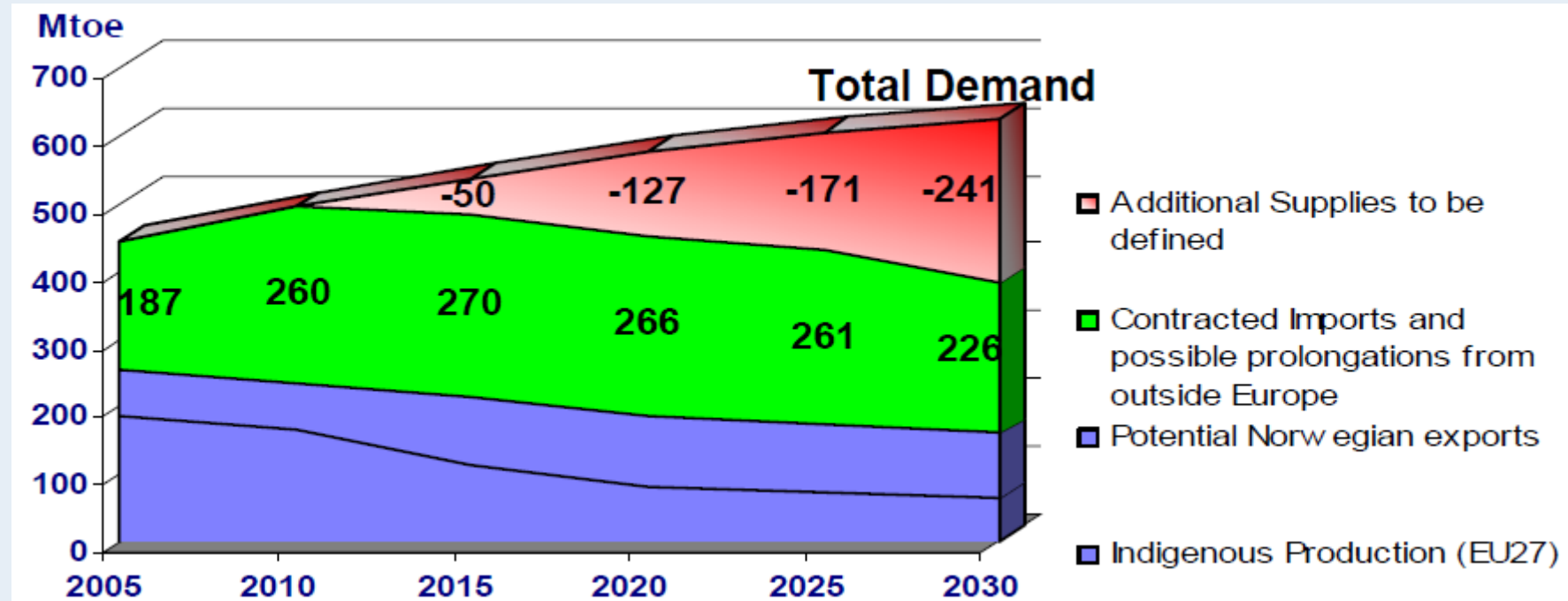
**Working Group: the future of security of supply – how does the ‘gas crisis’ affect European energy policy,
2nd Sept - Forum Alpbach**

EU27 Natural Gas demand outlook by sector



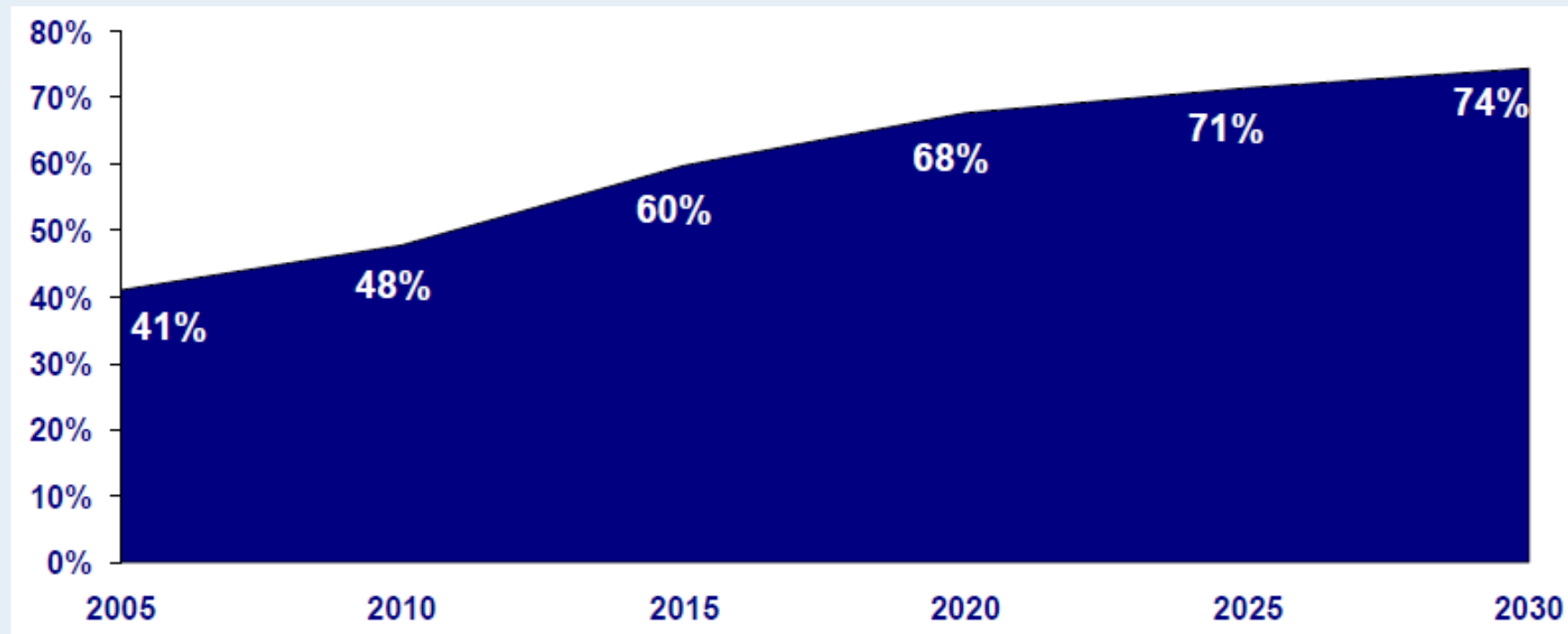
Source: Eurogas

Gas Supply outlook in Europe



Source: Eurogas

EU27 import dependency from outside Europe

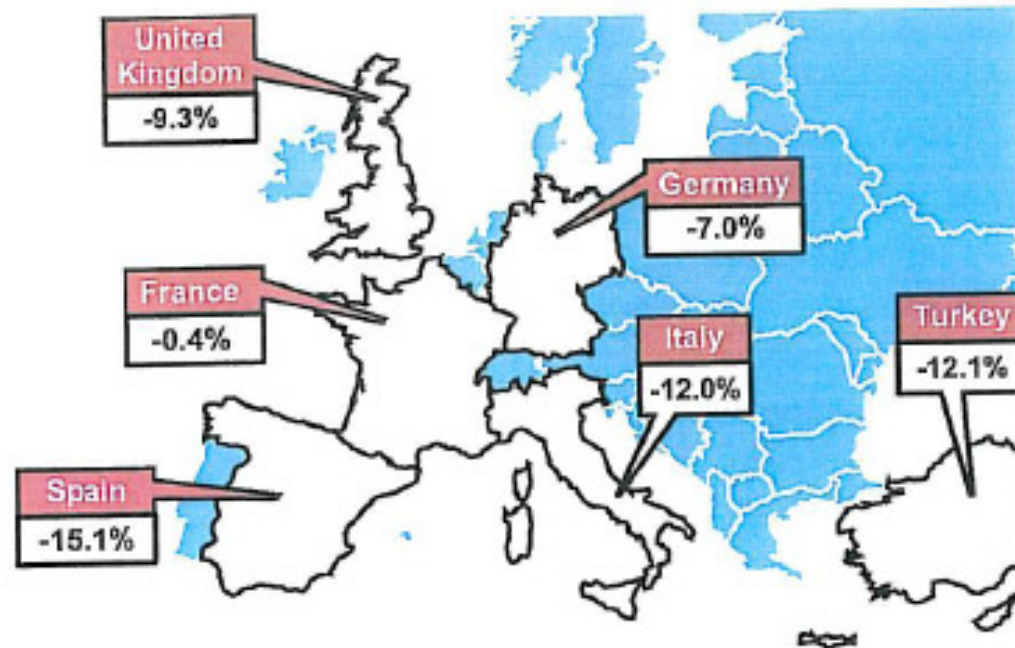


Source: Eurogas

Year-to-date Demand Reductions Across Europe by Country



Figure 1
Year-to-date Demand Reductions
Across Europe by Country

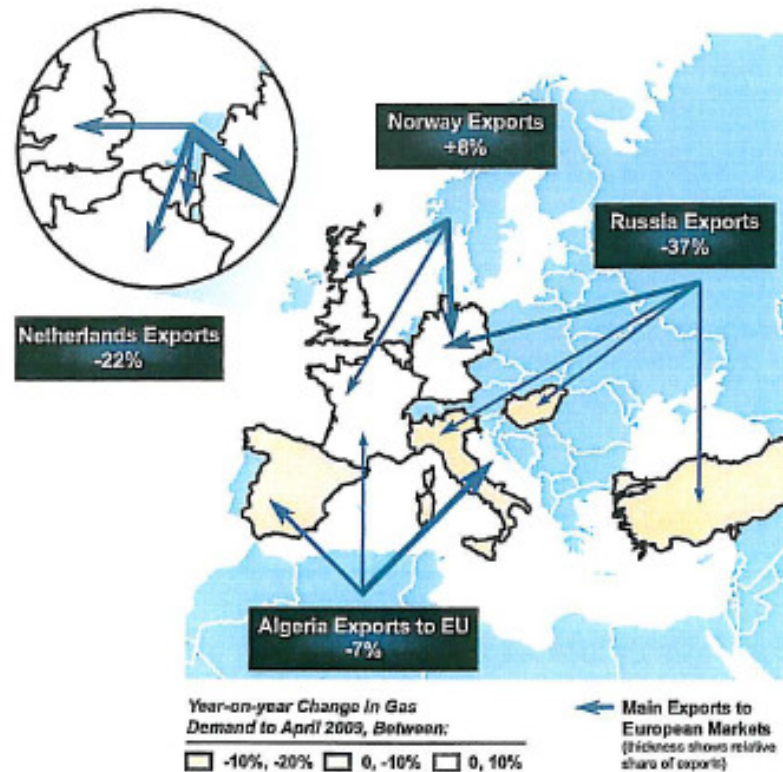


Source: IHS Cambridge Energy Research Associates.
Note: Actual consumption, not weather adjusted.
90808-1

Wxposure of Main Suppliers to Declining European Demand



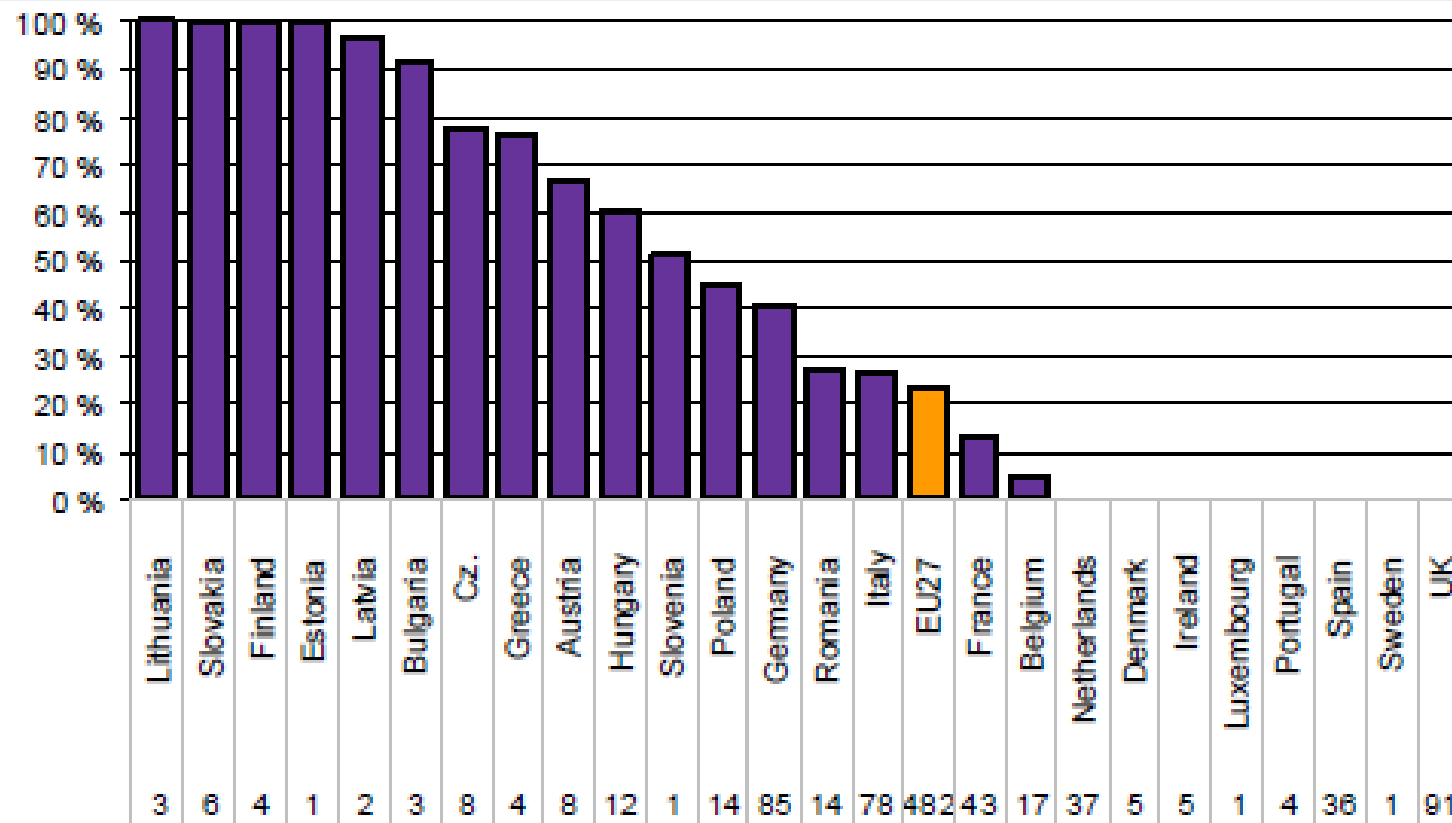
Figure 4
Exposure of Main Suppliers to Declining European Demand



Source: IHS Cambridge Energy Research Associates.
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Natural gas imports from the Russian Federation

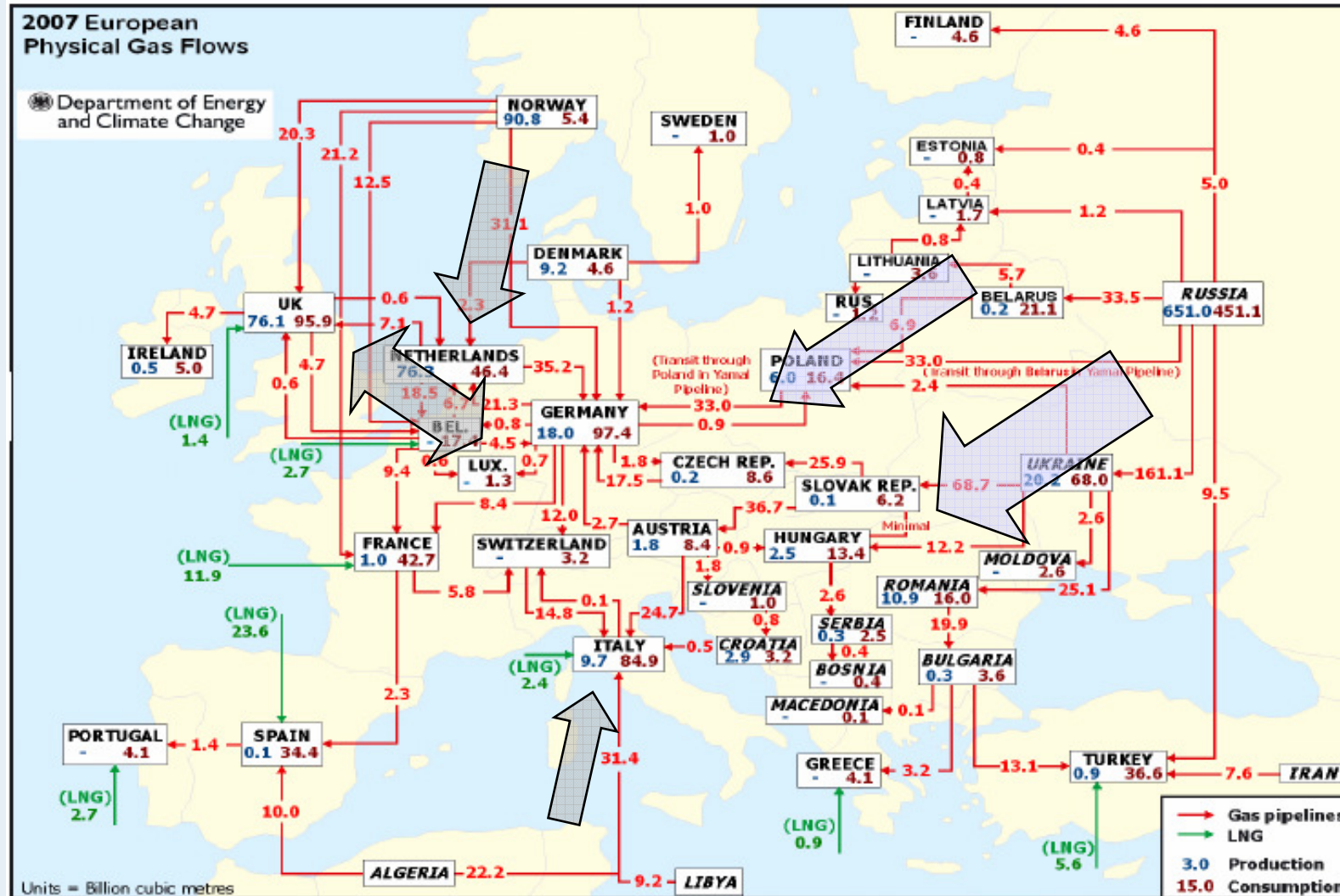
as a proportion of Gross inland consumption by EU MS in 2007



Quelle: Eurogas

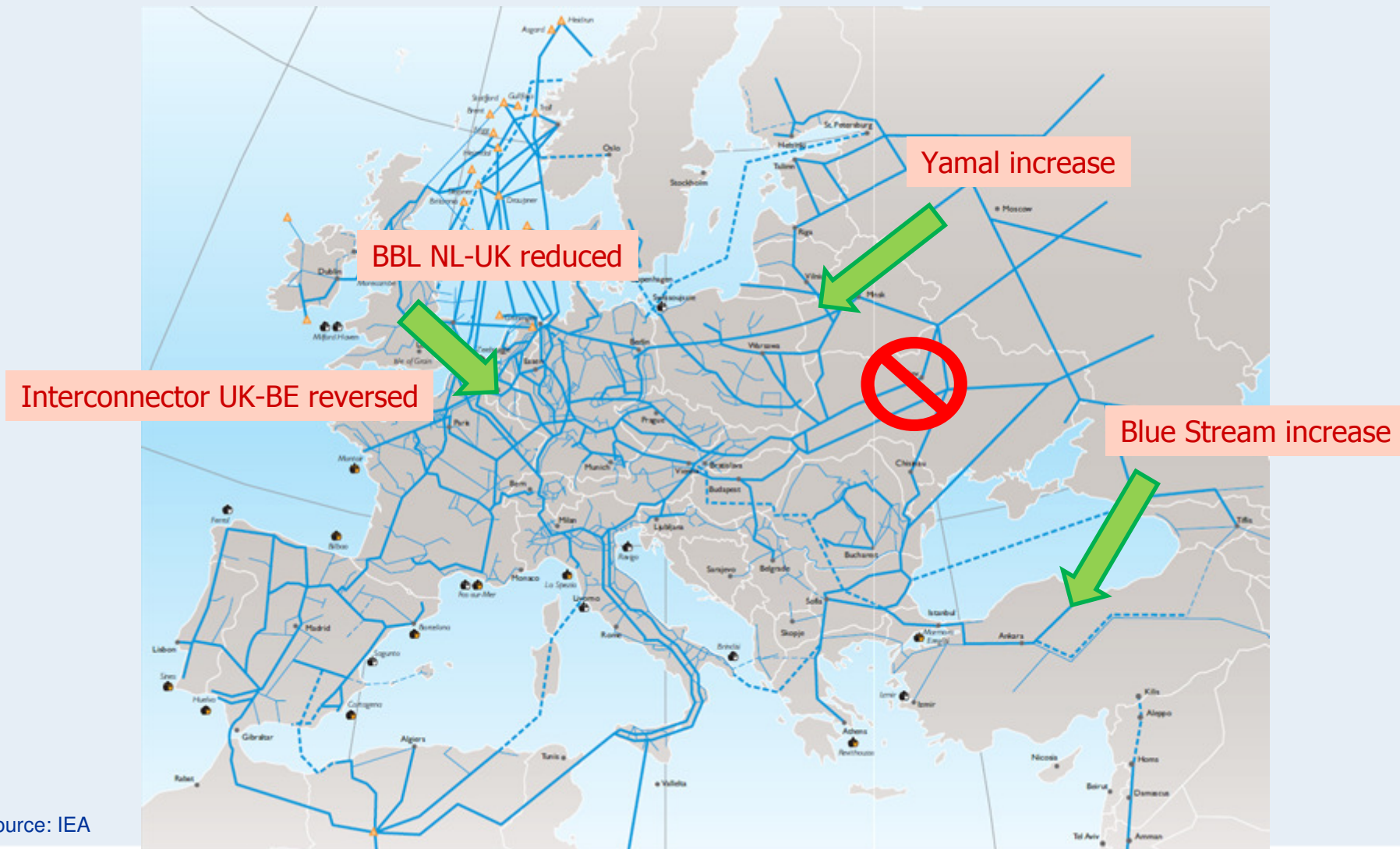
Numbers next to each member state represent the Gross inland consumption of natural gas (mtoe) in 2007

Design of Gas Infrastructure reflects historical gas flows



Gas Flows during the Russian Supply cut

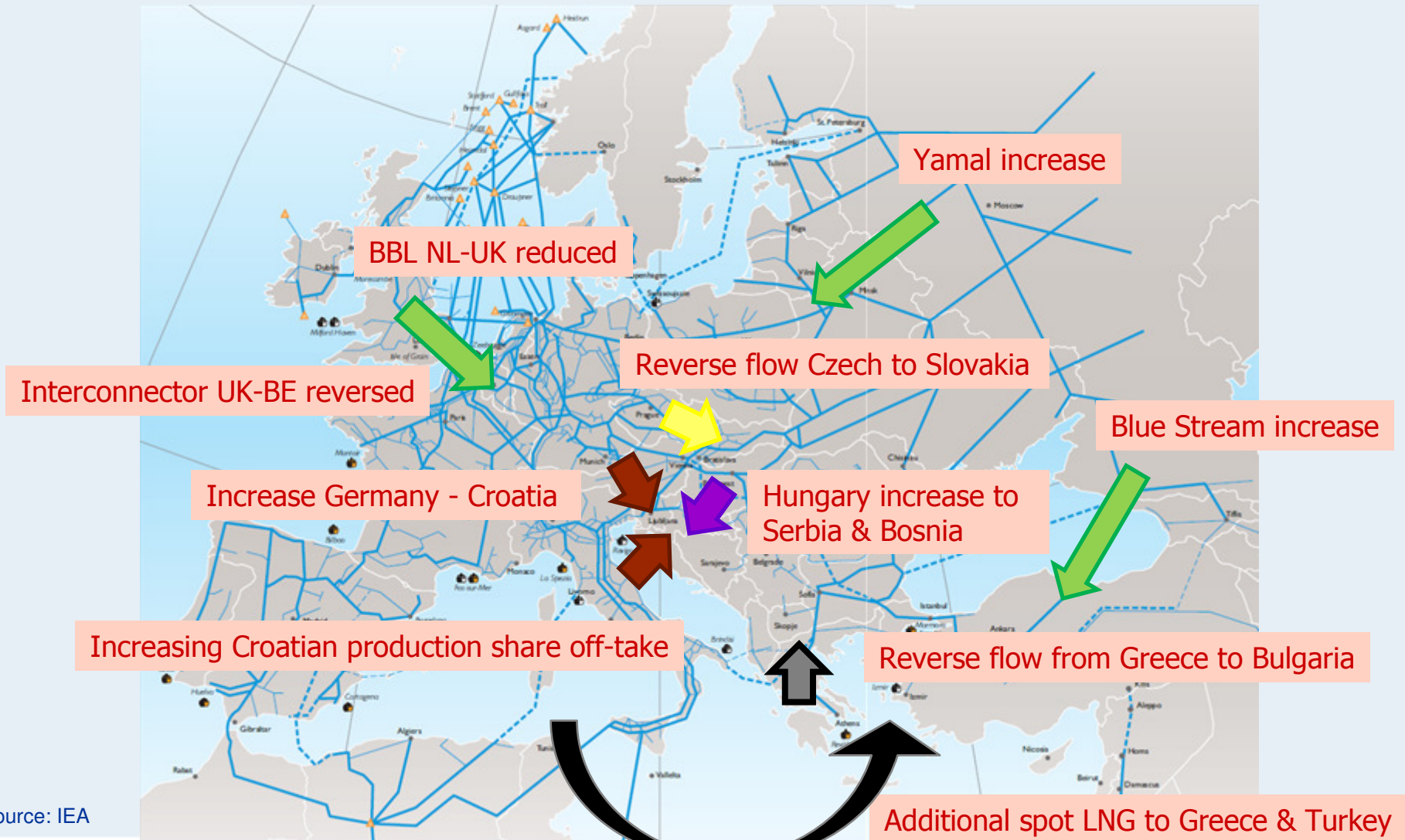
7 Jan 2009 – Immediate response in gas flows



Source: IEA

Gas Flows during the Russian Supply cut

18 Jan 2009 – Reverse flows took place



Source: IEA

SEE: Investments in market integration vs. economic losses of the Russian supply cut



- Reverse Flow investments in South East Europe 80-90 Mio. €
 - The European Energy Programme for Recovery will allow the recovery of up to 50% of the implementation costs of the accepted projects.
- Economic losses of the gas crises (reported by public Authorities)
 - Bulgaria: 255 Mio. €
 - Hungary: 70 Mio.€
 - Croatia: 270 Mio.€
 - Serbia: 54 Mio.€
 - Slovakia: ?



How Austria handled the crisis and how crisis management has been improved



Federal Ministry of
Economy, Family and Youth

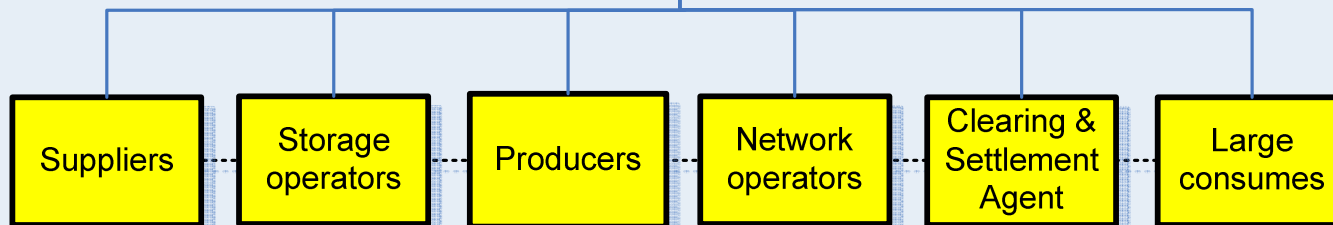
Enacts emergency measures

E-Control
GmbH

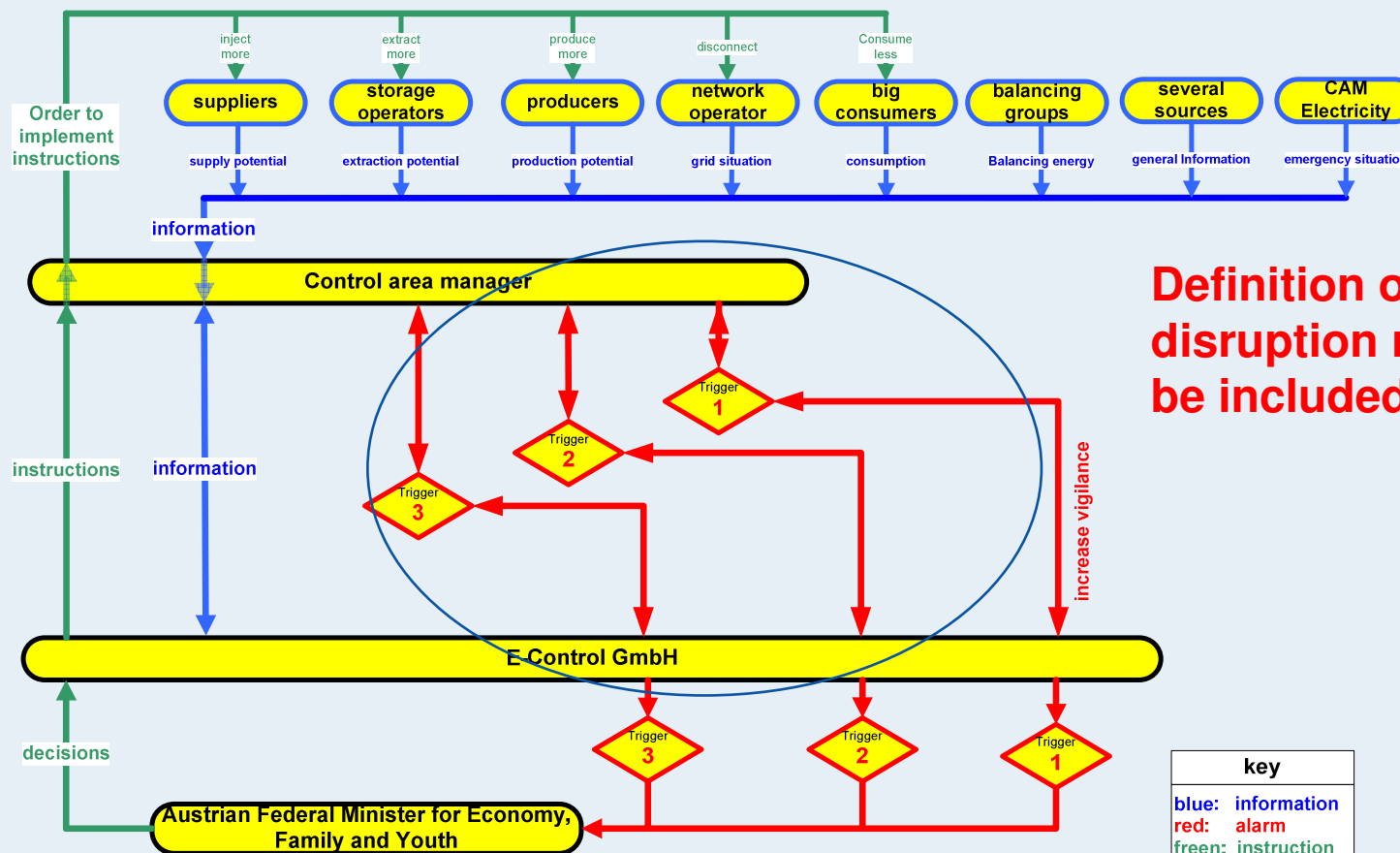
Monitors and prepares measures
„Manual for the prevention of natural
gas crises“

Independent
System Operator
(AGGM)

Operational Implementation

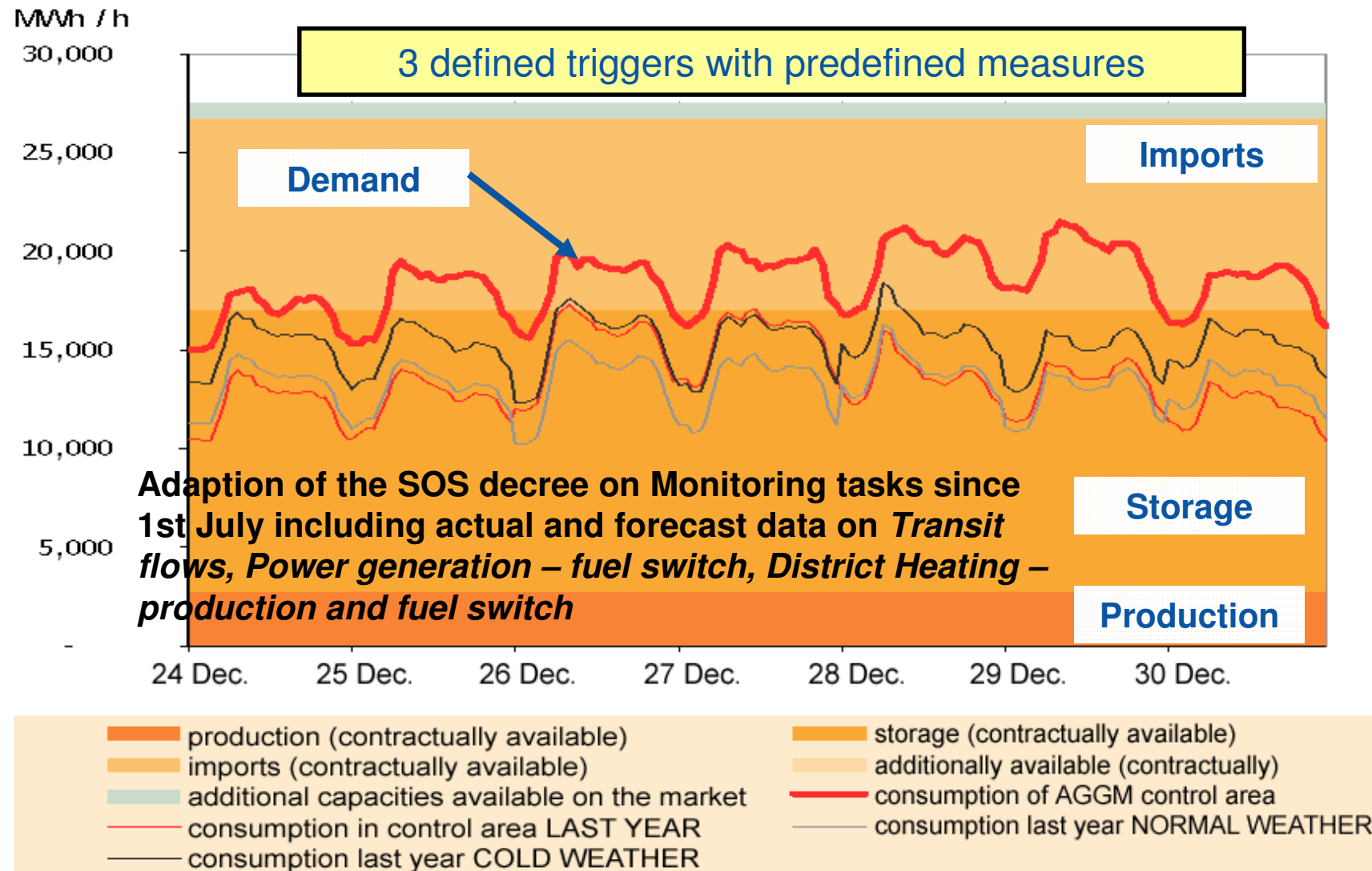


Manual for the prevention of natural gas crises - Roles and responsibilities



Emergency measures have been prepared and will be tested once again in November 2009 (first Test Oct. 2008) – Focus on disruption management of large industrial customers and gasfired power plants

SoS monitoring – weekly data



Further information



Walter Boltz

E-Control

Rudolfsplatz 13a

1010 Vienna

Austria

Phone: + 43 1 24724 200

E-mail: walter.boltz@e-control.at

<http://www.e-control.at>