



# Gas Infrastructure for Security of Energy Supply

18 November 2014

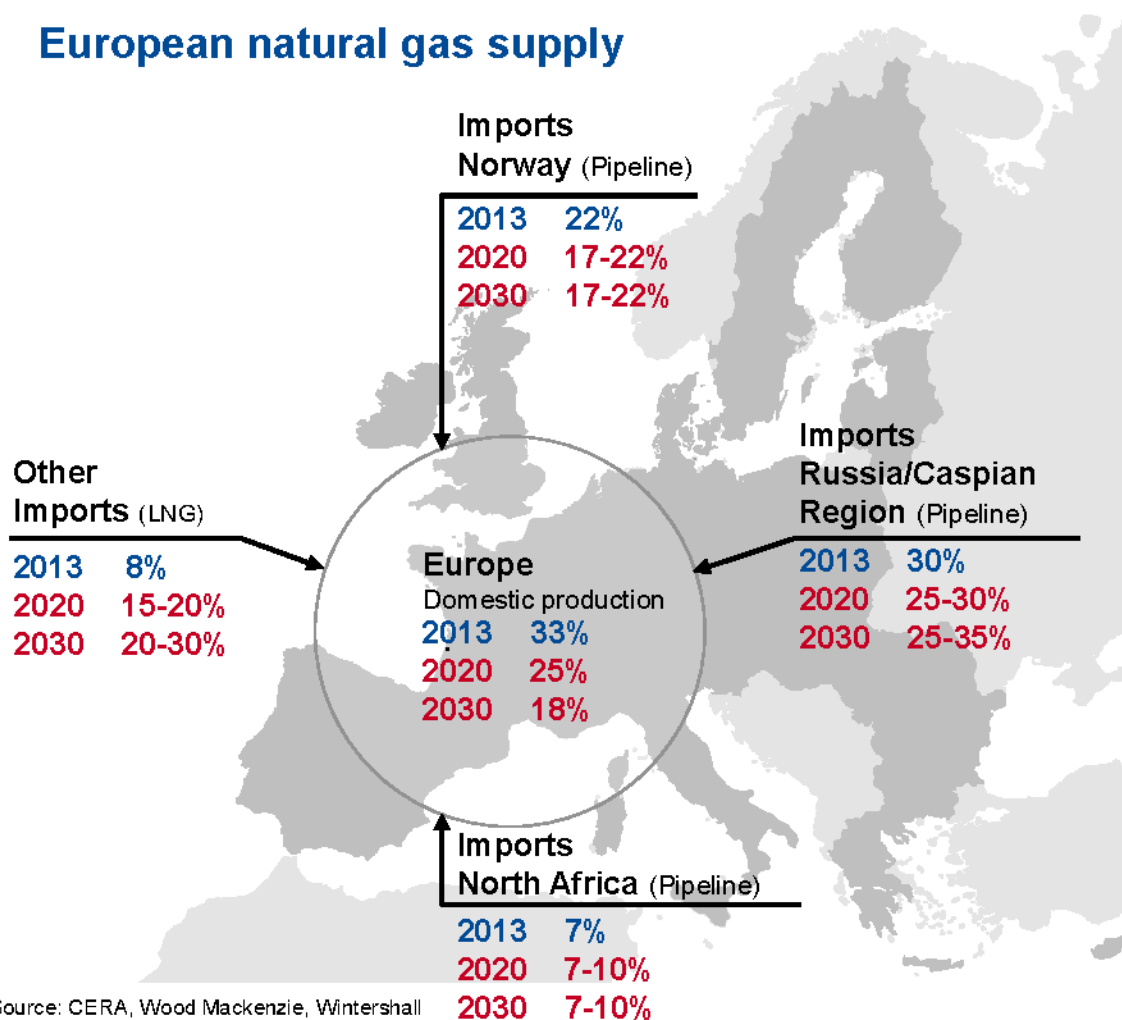
Follow us on  
[#gasweek14](#)

# Gas Week 2014: “Gas infrastructure for EU Energy Security”

Torsten Murin  
Vice President, Wintershall Holding GmbH

Brussels, 18 November 2014

## European natural gas supply

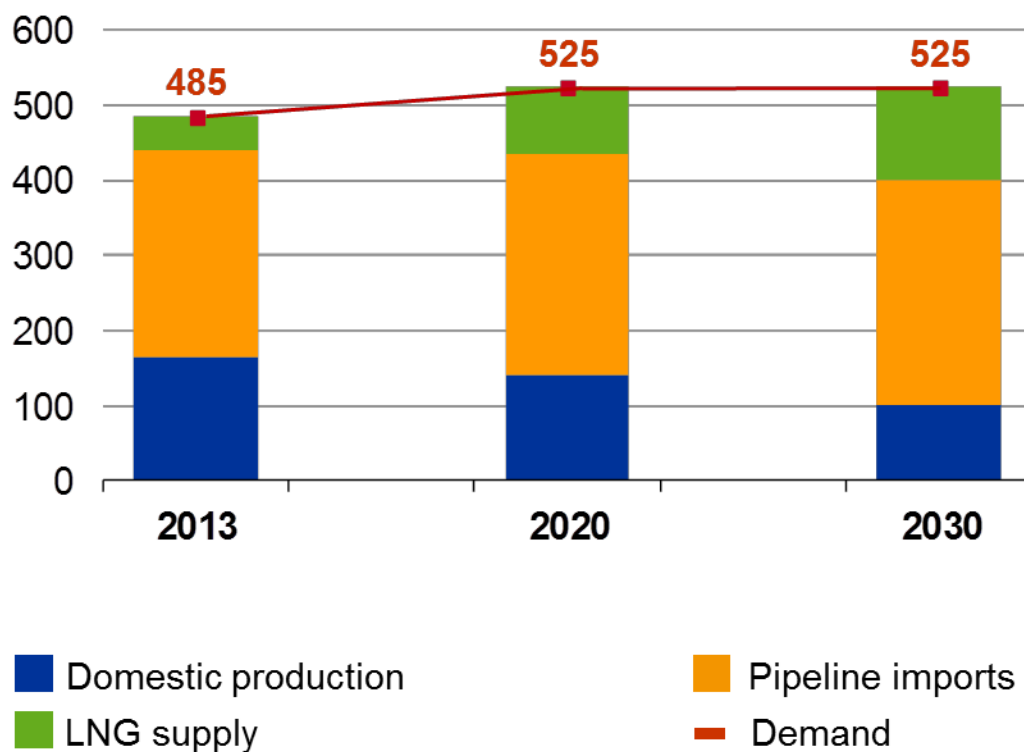


## Key facts

- Natural decline of domestic gas fields in Europe from 165 bcm in 2013 to 140 bcm in 2020 expected
- Increasing importance of LNG imports in the long run, particularly for UK, Spain and France

Source: CERA, Wood Mackenzie, Wintershall

EU supply/demand balance gas (bcm)



(EU28) WIHO/2014

Producers do select their customers:

Which criteria?

- Gas export prices and transportation costs
- Long-term demand is important
- Consistency and reliability of political decisions

### Complementary interests as basis for a win-win partnership

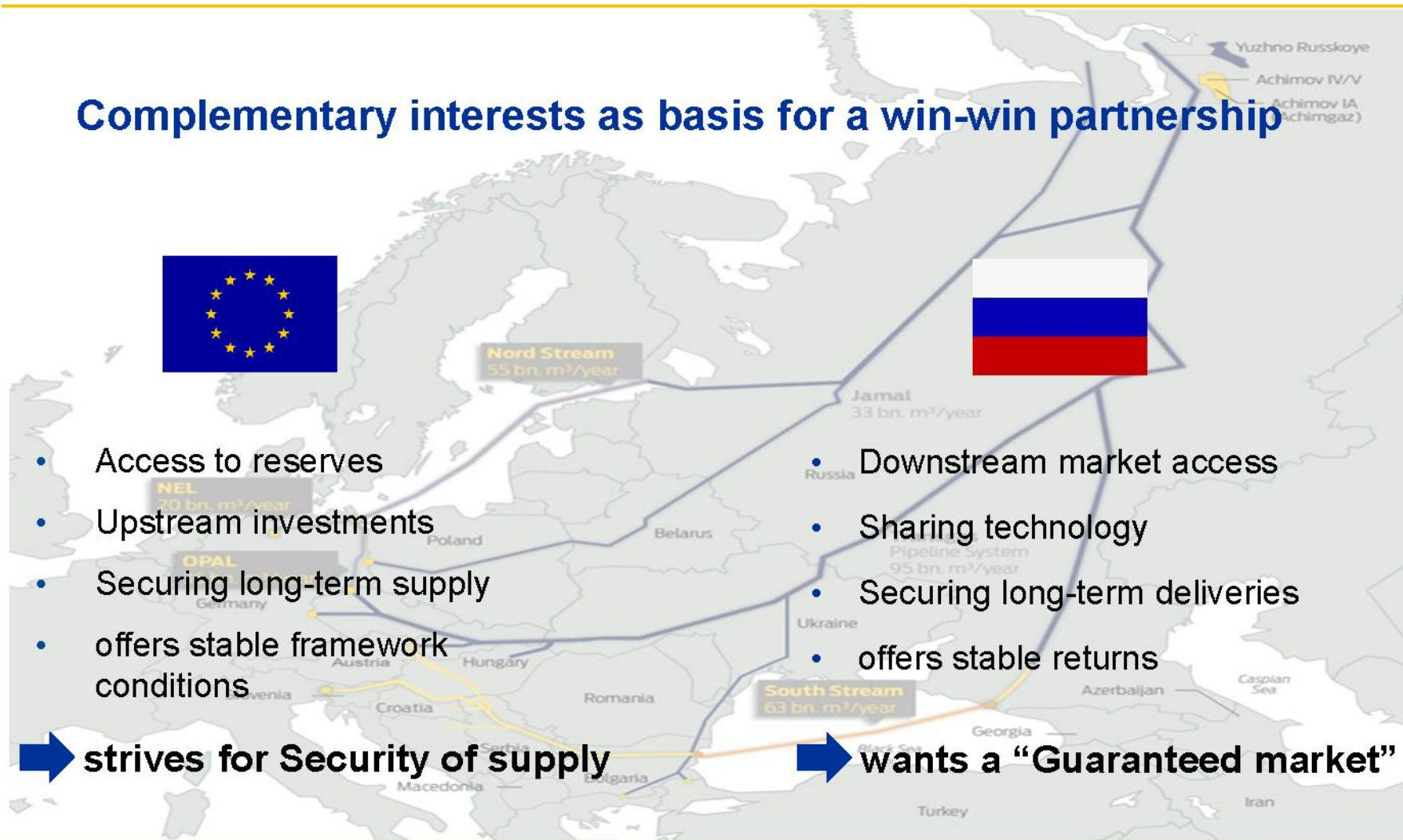


- Access to reserves
- Upstream investments
- Securing long-term supply
- offers stable framework conditions

- Downstream market access
- Sharing technology
- Securing long-term deliveries
- offers stable returns

➔ **strives for Security of supply**

➔ **wants a “Guaranteed market”**





**... but competition has already started!**



# Gas Infrastructure for Security of Energy Supply

18 November 2014