



24th World Gas Conference
ARGENTINA | 2009
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The Global Energy Challenge:
Reviewing the Strategies
for Natural Gas

INFRASTRUCTURE DEVELOPMENTS in South Eastern Europe (“SEE”)

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INFRASTRUCTURE DEVELOPMENTS in South Eastern Europe (“SEE”)

AGENDA

- SEE – definition and specifics
- Existing infrastructure in SEE
- Current projects running through SEE
 - Nabucco, South Stream,
Energy Community Ring, interconnectors & storages
- Austria as link to Central, Western Europe & Italy
- Conclusions



South Eastern Europe (SEE) – definition and specifics

- Albania, Bosnia&Herzegovina, Bulgaria, Croatia, Kosovo, Macedonia, Montenegro, Romania, Serbia
(+ AUSTRIA as window to Central/Western Europe)
- 6 SEE-markets already use gas, with supplies primarily coming from Russia (transiting Ukraine)
- 2 SEE-markets have significant domestic production (Romania & Croatia)
- **Small market** size (except Romania) → establishing new transmission/import corridors to supply the SEE-markets **alone** is **difficult**
- **Projects** for transmission/import corridors to cross the SEE to supply **major markets** in Central, Western & Southern Europe
- Transmission/Import corridors open possibility for **branch lines** to increase/diversify the existing/new supplies to SEE-markets.



Nabucco

- ▶ Turkey - Bulgaria - Romania - Hungary - Austria
- ▶ Distance : 3,300 km
- ▶ Capacity : 31 bcm/y
- ▶ Investment : 7,9 bn EUR
- ▶ Collecting existing / new infrastructure
- ▶ New supply sources
- ▶ "Fourth corridor" of supply to EU/Europe

NABUCCO, SOUTH STREAM





Energy Community Ring, interconnectors & storages

Energy Community Ring

- ▶ Suitable For incremental development
- ▶ Entire ring to be completed in final step
- ▶ Further connection possibilities to/from ring
- ▶ Ring's development flexible in terms of timing and scope

Interconnectors and Storages

- ▶ HU ↔ ROM (Szeged - Brad)
- ▶ ROM ↔ BG (Giurgiu - Russe)
- ▶ Storages → Romania = promising area



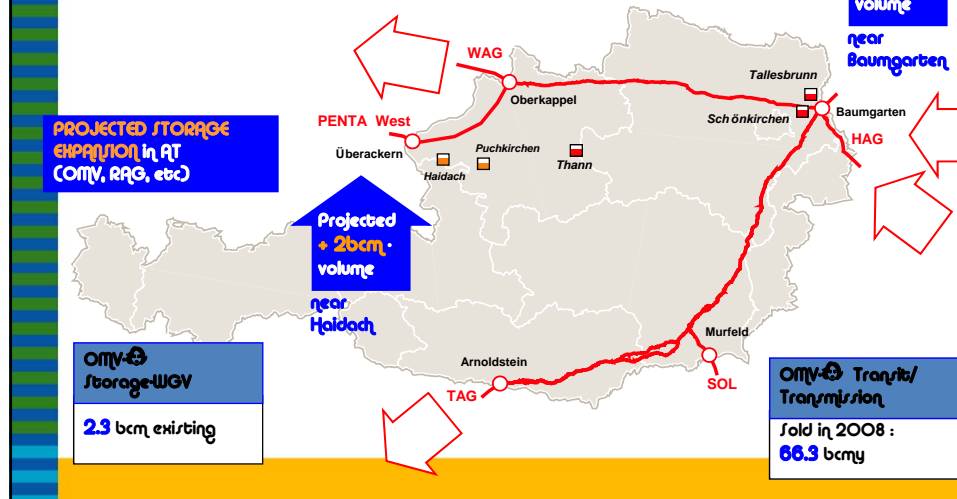
Austria as link to Central, Western Europe & Italy

- OMV puts focus on CEE / "European Growth Belt"
- Long-term access to supply sources & equity gas (OMV)
- Transit capacities on main routes
- Long-term storage capacities
- Trading know-how
- Central European Gas Hub (CEGH) at Baumgarten
- Favourable geographical position
- **Baumgarten is focus (transport & storages & trading/CEGH)**





Austria as door from/to SEE



CONCLUSIONS

- Transmission/Import corridors of „European“ dimension will trigger gasification of SEE.
- New transmission/import corridors enhance Security of Supply & Diversification of supply routes + sources. Other developments will follow stepwise.
- Austria & OMV are well positioned for all these new developments and proactively pushing transport- & storage-projects in/around SEE & Austria
- Austria is door from / to South Eastern Europe.



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Thank you for your attention !
¡ Muchas gracias por su atención !

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