



## Gas Infrastructure Developments in Europe “Mind the Gap”



Marcel Kramer, Chairman of the Board and CEO

gasunie



## New infrastructure crucial for security of supply and liquidity





### Gas Infrastructure in Europe: a changing corporate landscape

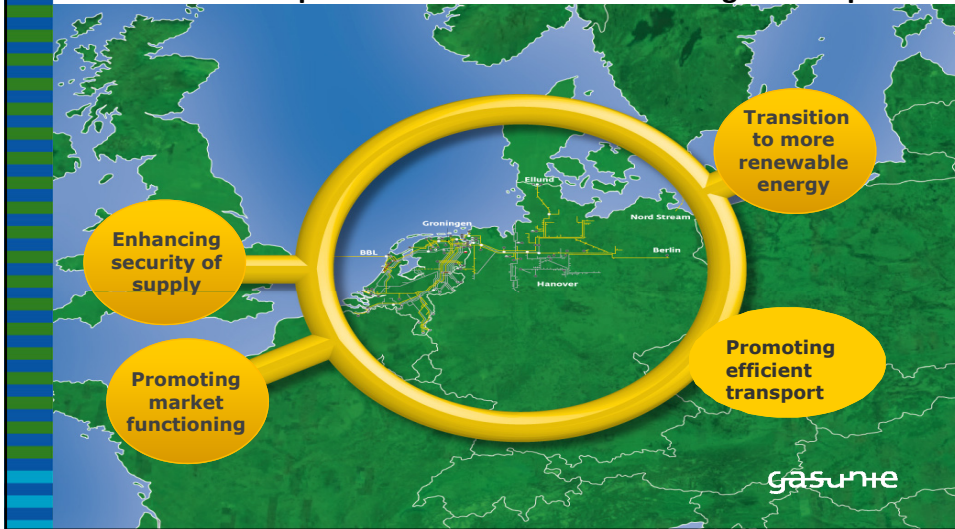


### Gasunie cross border network transports ≈ 125 bcm





### The NW European Gas Roundabout - A Strategic Concept



### The "Roundabout" is being built... Connecting Europe with other gas markets

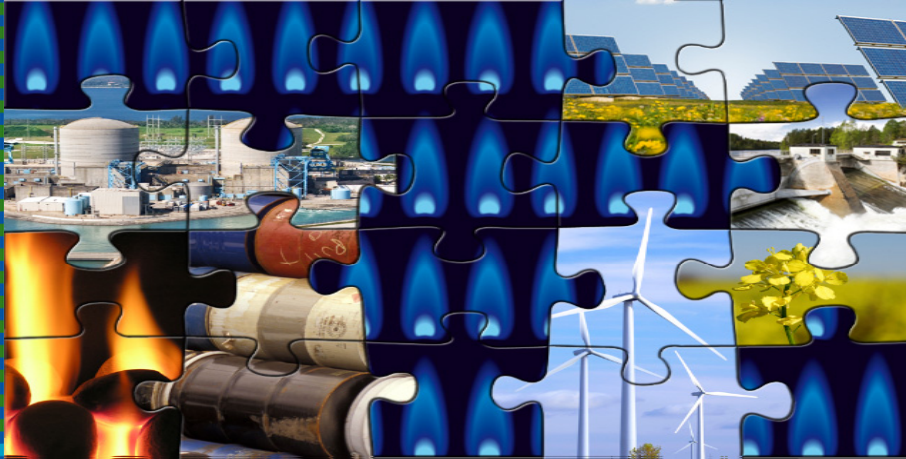




24<sup>th</sup> World Gas Conference  
ARGENTINA | 2009  
5-9 October

The Global Energy Challenge:  
Reviewing the Strategies  
for Natural Gas

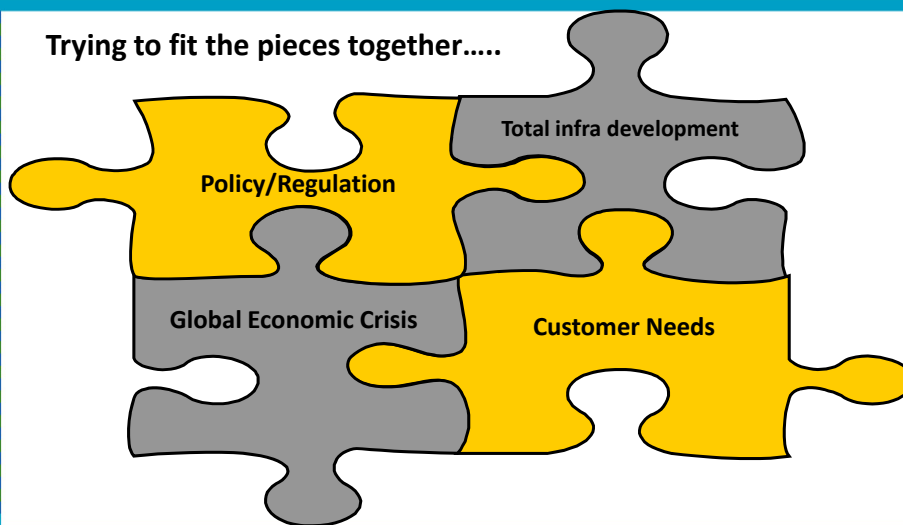
## Natural gas: diversification & sustainability of future energy



24<sup>th</sup> World Gas Conference  
ARGENTINA | 2009  
5-9 October

The Global Energy Challenge:  
Reviewing the Strategies  
for Natural Gas

## Trying to fit the pieces together.....





## Europe's midstream infrastructure needs:

- **Major investments**
  - To transport new gas to markets
  - To guarantee security of supply
  - To create a well-functioning internal EU market
  - To enhance the efficiency of EU infrastructure for all suppliers
- **A more integrated European Regulatory approach that balances the need for:**
  - Enhanced services and cross-border flows
  - Access for multiple suppliers
  - Avoiding unnecessary infrastructure costsAnd most importantly:
  - **Ensuring that infrastructure remains an attractive sector for investment !**



**Thank you for your attention!**

