

# Challenges of the Energy Supply in the 21st Century

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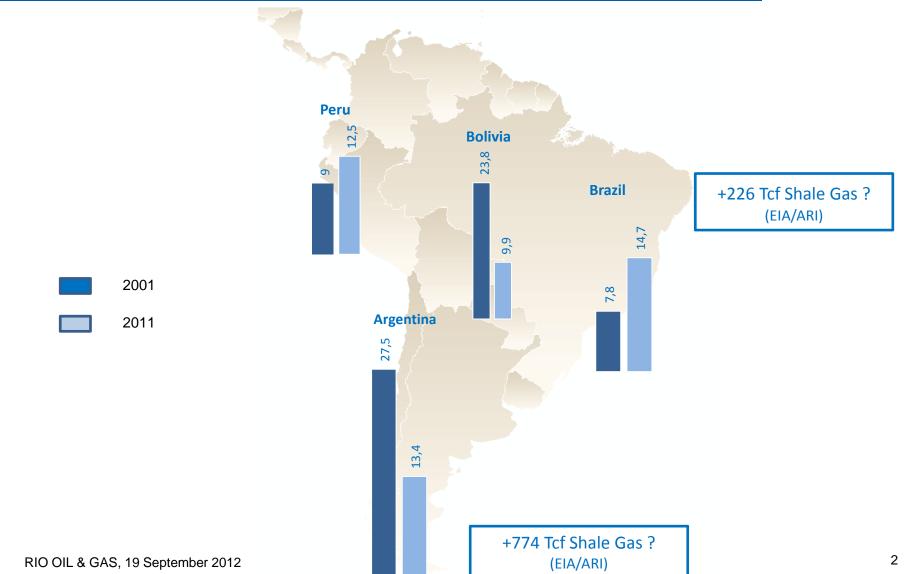
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## GAS RESERVES IN THE SOUTHERN CONE - 2011 vs 2001

**CEDIGAZ - Tcf** 

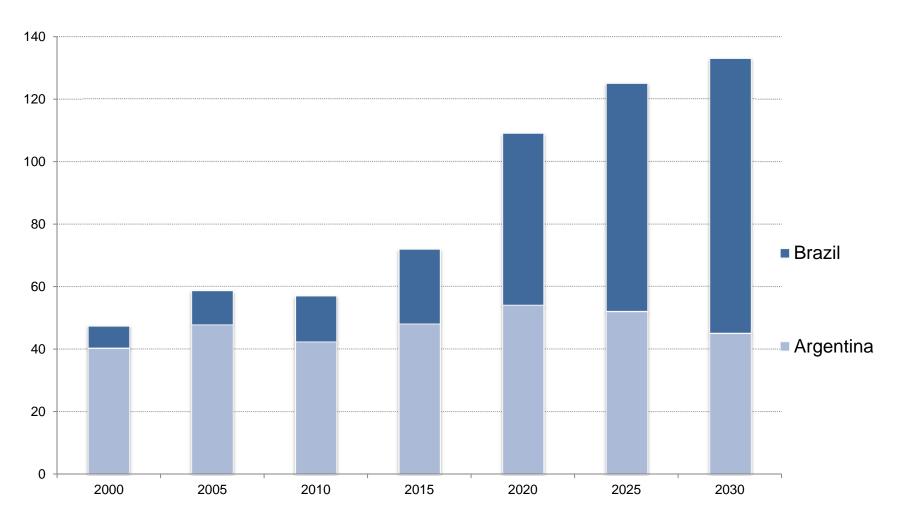




### **GAS PRODUCTION OUTLOOK – BRAZIL & ARGENTINA**

IEA WEO 2011 - New Policies Scenario (Bcm)



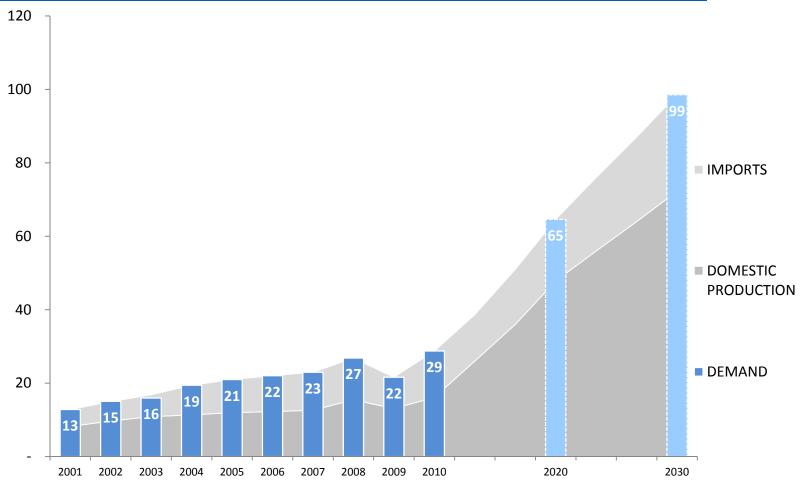


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#### **BRAZILIAN GAS SUPPLY AND DEMAND**

BRAZILIAN DEPARTMENT OF ENERGY (Bcm)





Sources: Historical data: Balance energetico 2011 (MME)

Forecast: Matriz energetica 2030 (MME)

#### **PIPELINES & LNG INFRAS**

**TOTAL 2012** 







Existing



Planned

#### **Regas Terminals**



Existing

Planned **Operating Pipelines** 

**Planned Pipelines** 



#### **REGULATORY INTEGRATION: 4 KEY CHALLENGES (1)**



- 1. FOSTER INFRASTRUCTURE INTEGRATION BY ENSURING THE BANKABILITY OF NEW TRANSCONTINENTAL GAS PIPELINES AND CROSS BORDER INTERCONNECTION.
  - Exemption of Third Party Access
  - Use of an international currency reference
  - Differentiation of the regulatory rates of return
- 2. ENSURE COMPATIBILITY OF TARIFF SYSTEMS BETWEEN NATIONAL AND TRANSIT FLOWS.
  - Harmonization of tariff structures
  - Elimination of « pancaking » of tariffs at the burder
  - Promotion of the « entry-exit » tariff system within balancing zones

#### **REGULATORY INTEGRATION: 4 KEY CHALLENGES (2)**



- 3. SIMPLIFY ACCESS TO PIPELINES FOR CROSS-BORDER SHIPPERS
  - Harmonization of the main cross-border access rules for shippers
  - Development of a secondary market of cross border capacity
  - Adressing the issue of a set of commun rules for shippers
- 4. DEVELOP A REGIONAL LEVEL OF INTEGRATION, INITIATIVE AND PROGRESS FOR THE GAS INDUSTRY.
  - Initiatives of « open seasons »
  - Development of hubs and market places
  - Fostering of market coupling and extension of balancing zones



## « OBRIGADO PELA SUA ATENCÃO »

