



Current aspects of the Spanish Gas Sector

Marta Margarit
General Secretary of Sedigas

Barcelona, October 2012

Agenda

1.Sedigas

2.Gas data 2011

3.Communication & marketing

Sedigas – Spanish Gas Association

Sedigas was created in 1970; it represents all the gas sector in Spain: natural gas and GLP by pipe.

- It has more than 150 members: transport companies, companies of distribution, suppliers and traders. As well There are also services and appliance companies.
- We are the voice of the gas sector with the Government and the Spanish regions administrations.
- We represented the Spanish gas sector at the IGU.
- We promote the use of natural gas.



Agenda

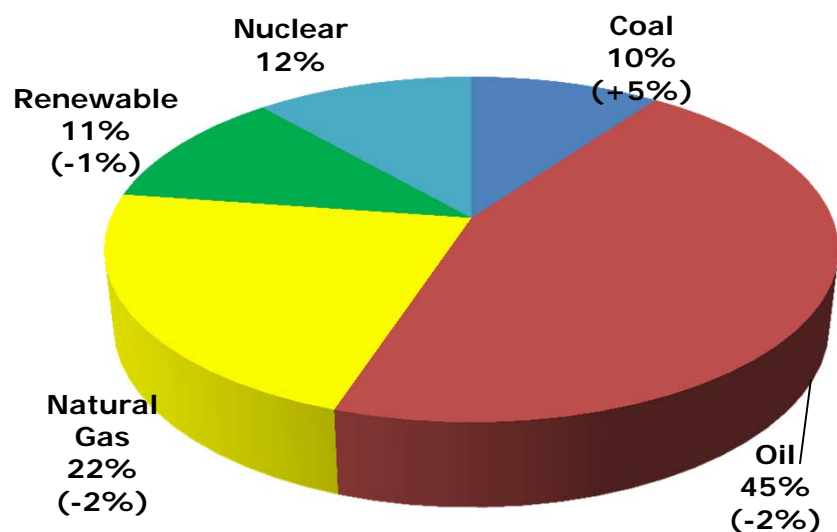
1.Sedigas

2.Gas data 2011

3.Communication & marketing

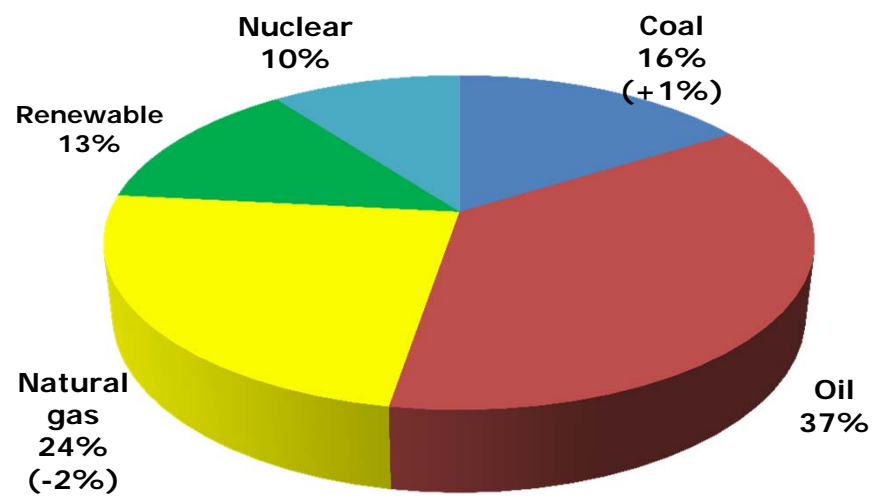
The share of the natural gas in the primary energy balance in Spain is similar to Europe

Spain, 2011



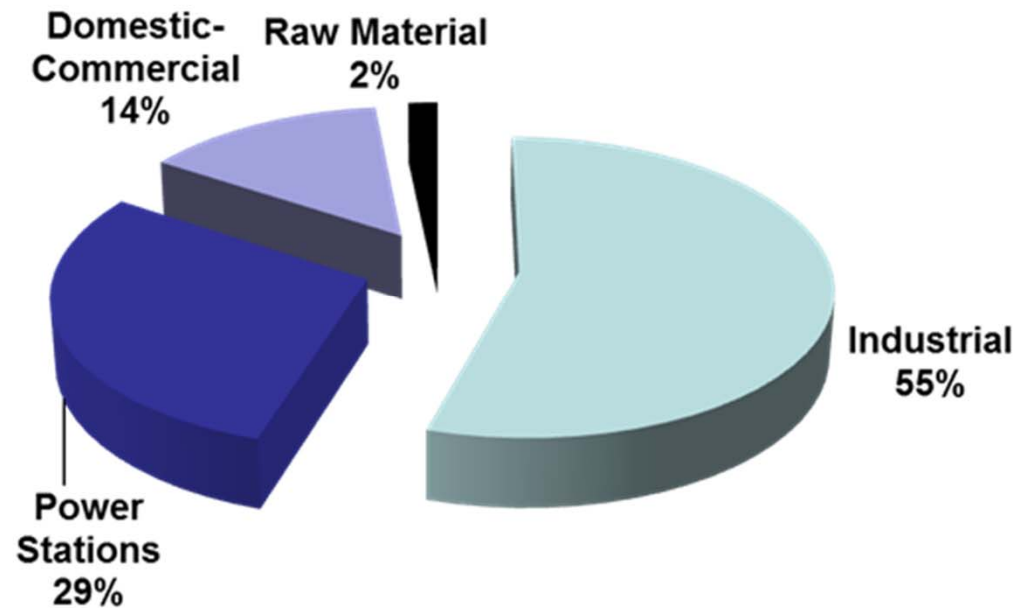
Source: MINETUR

Europe, 2011



Natural gas represents 22 % of the primary energy consumed in Spain

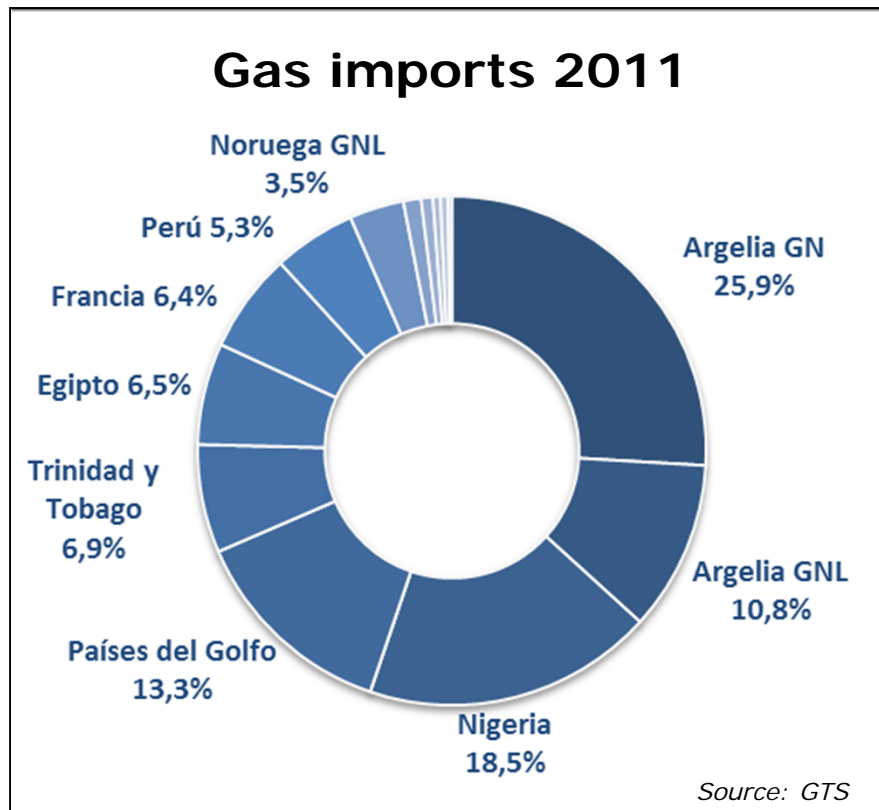
The main consumer of gas in Spain is the industry sector with 55 % of the total consumption.



Source: Sedigas

Spanish gas demand in 2011, 32 bcm

The Spanish gas system is one of the most open and secure of Europe



Accessibility

- 6 regasification plants
- 6 international connections

Flexibility

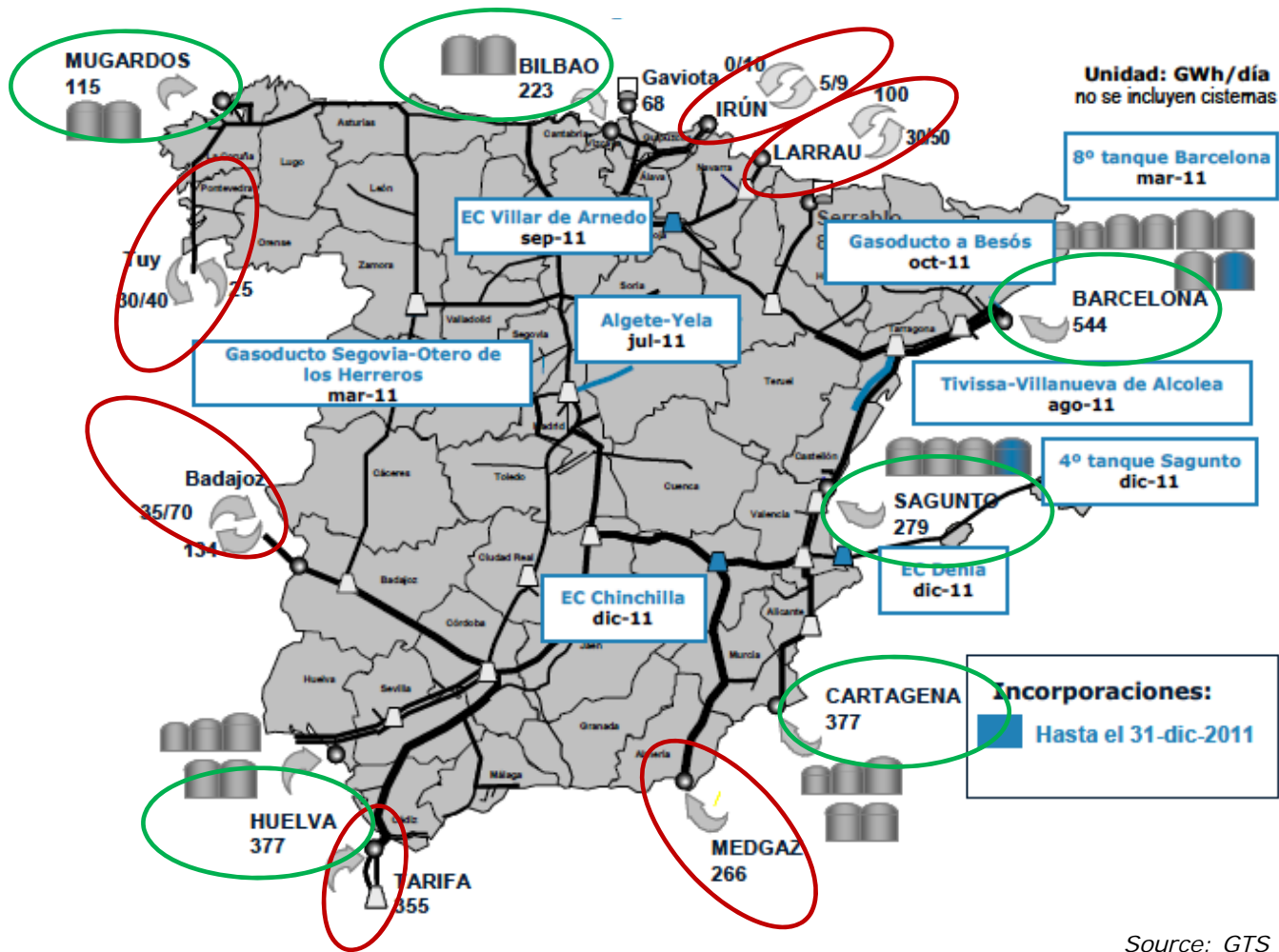
- 67 % of the gas entered in the shape of a GNL
- 349 LNG ships unloaded in terminals

Diversity

- Gas from 13 countries
- 50 % maximum of a country supplier

The Spanish legislation allows maximum 50% the import of single origin

Infrastructures's Network in 2011

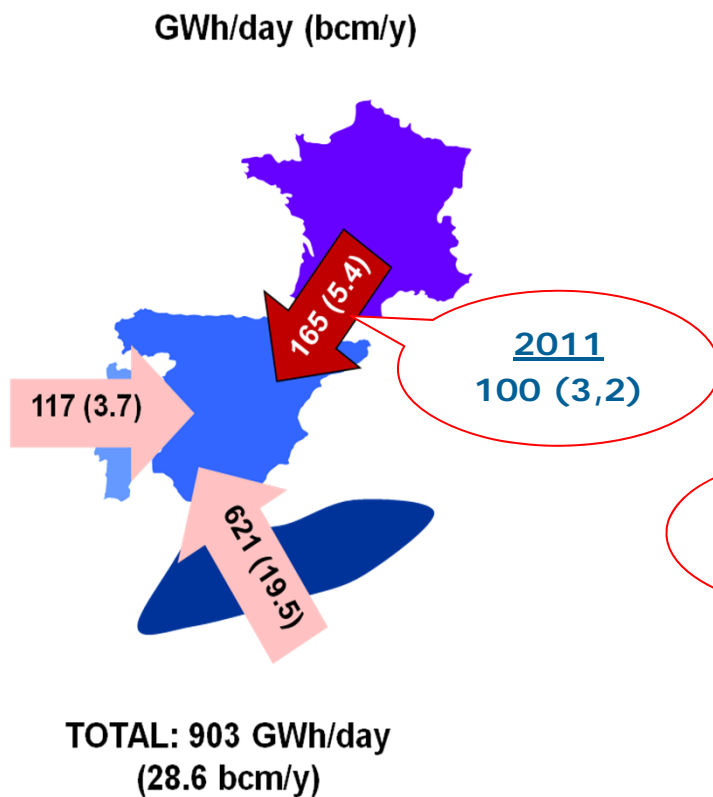


- ✓ 6 regasification plants
- ✓ 6 international connections
- ✓ 76.403 km of network

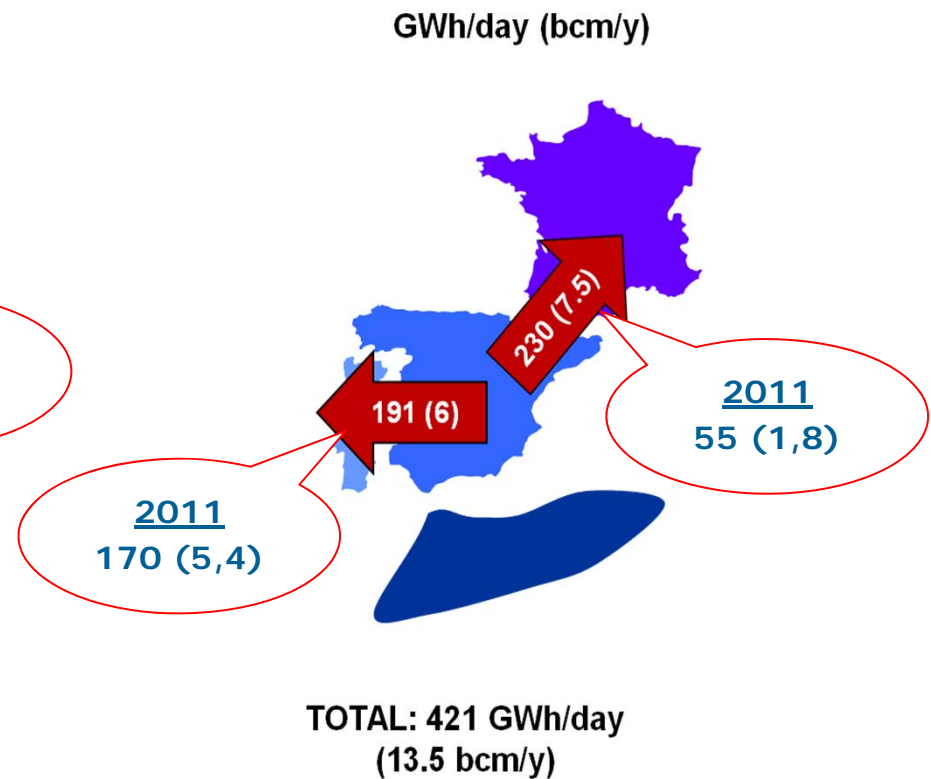
Source: GTS

In 2015 the interconnections gas with France will reach 7,5 bcm

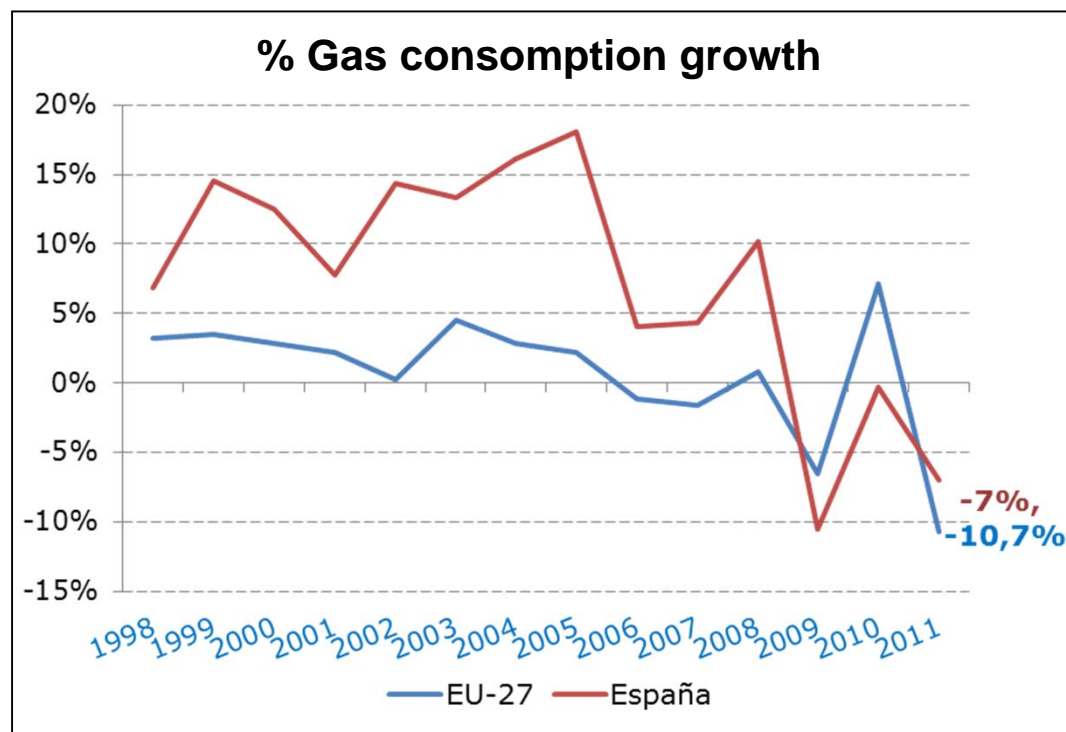
Import capacity



Export capacity

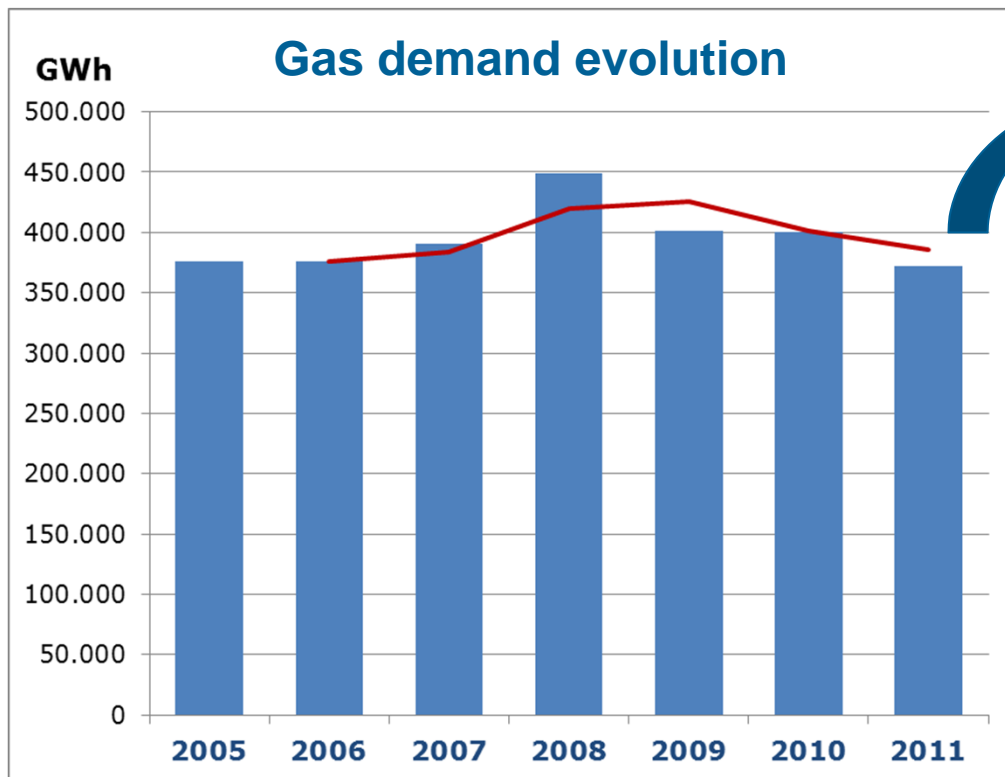


The Spanish consumption follows the same pattern as the European consumption



Source: Sedigas et Eurogas

In 2011, the demand decreased at the level of 2005, because of the reduction of the consumption of combined cycled plants and climatology.



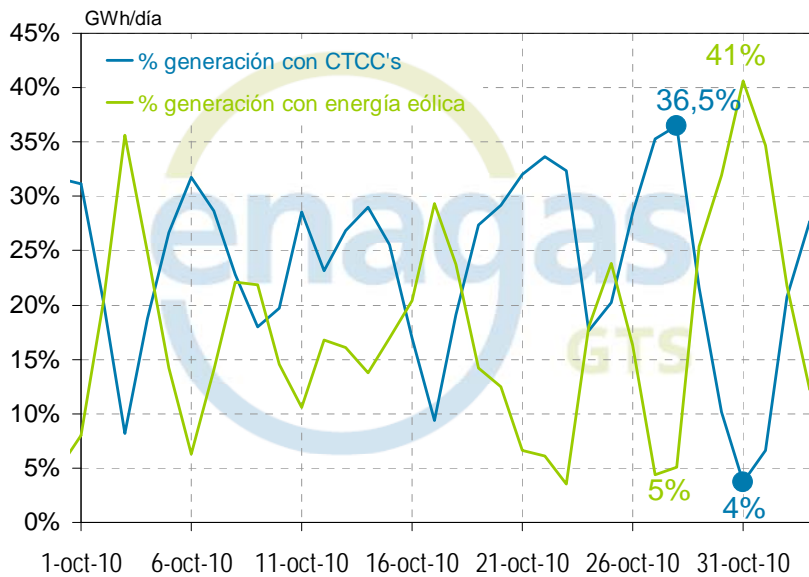
Source: Sedigas

- ✓ CCGT as a backup
- ✓ A soft climate
- ✓ Decrease of the electric consumption
- ✓ The increase of the coal consumption
- ✓ The low cost of CO₂

The gas brings flexibility to the generation mix

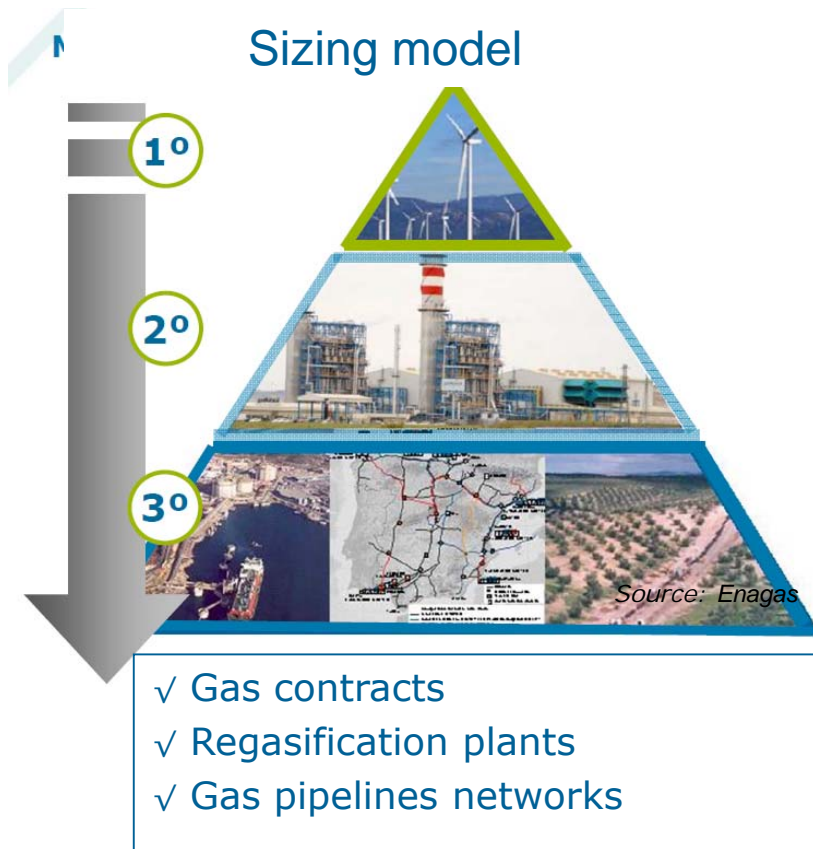
The combined cycles power allow to cover the electric demand by compensating the not flexibility of the renewable

The role of the combined cycles power requires the planning of gas infrastructures



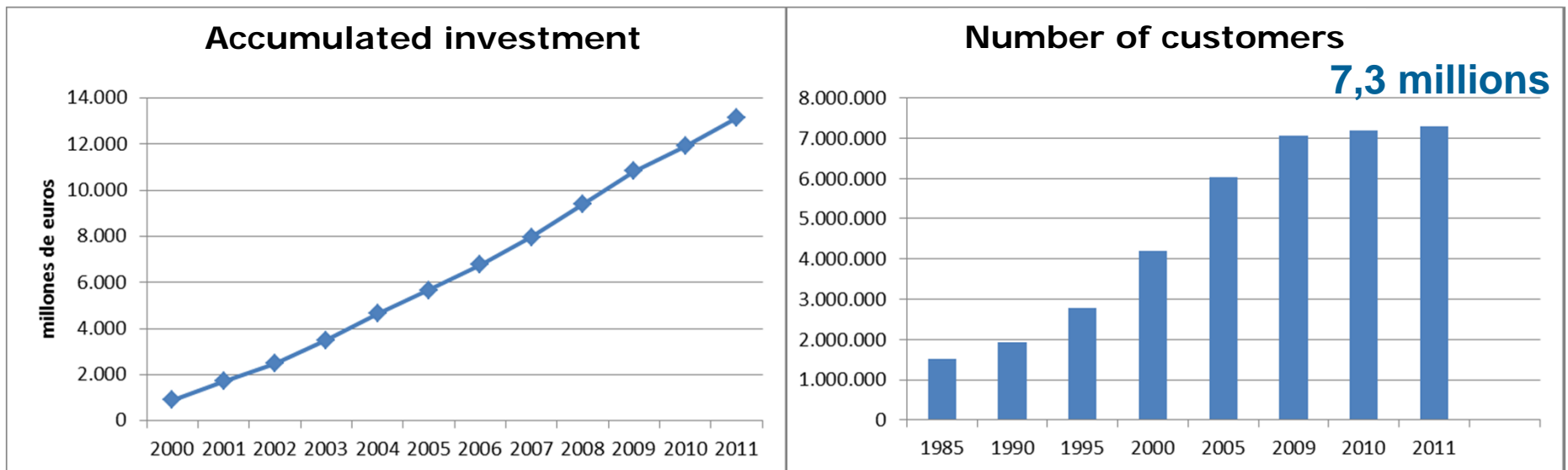
Source: GTS

Sizing model



The gas sector continues to invest in spite of the economic crisis and the decrease of the consumption.

Around 70% of the Spanish population lives in towns with natural gas infrastructure available but it supplies only one-third of the Spanish homes.



Source: Sedigas

Source: Sedigas

The main pillar for the future of natural gas are the promotion of new usages and expansion the network distribution



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www.sedigas.es

Is the core tool to provide off-line information

The screenshot displays the homepage of the Spanish Gas Association (sedigas). At the top left is the logo, a blue daisy flower next to the word "sedigas" in blue, with "Asociación Española del Gas" below it. To the right are links for "Ahora también en Twitter" and "ENGLISH VERSION", and a search bar labeled "Buscar...". A horizontal navigation menu contains the following items: ASOCIACIÓN, SOSTENIBILIDAD, PUBLICACIONES, COMUNICACIÓN, NORMALIZACIÓN, ESTADÍSTICAS, ANUARIO, and CONTACTAR.

Below the navigation menu, there are several content blocks:

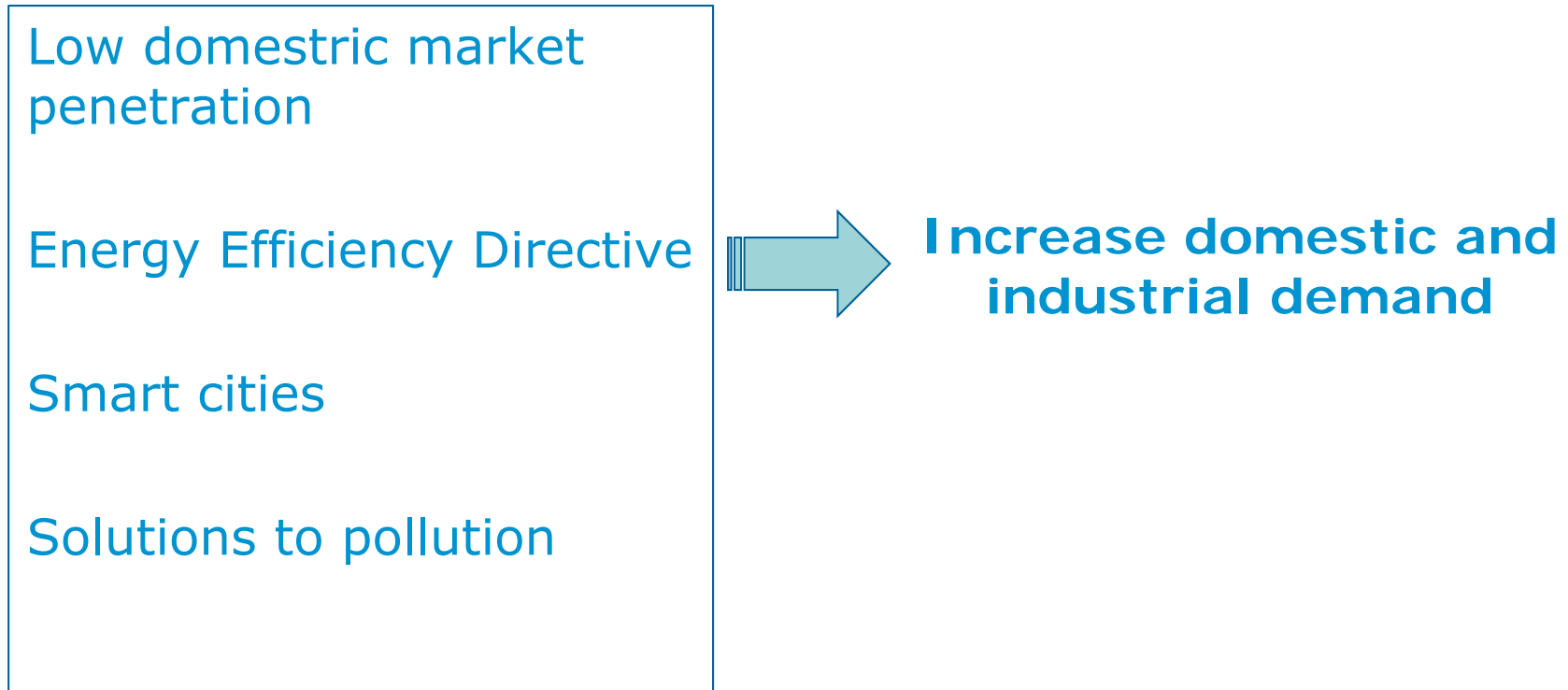
- Datos del sector:** A table showing key statistics:

| | |
|-----------------------------|---------|
| DEMANDA 1er Sem 2012 | 190 TWh |
| SECTOR IND. RESPECTO 2011 | 7,5 % |
| SECTOR ELÉCT. RESPECTO 2011 | -24,0 % |
- Noticias destacadas:** A list of news items with an RSS icon, including "Sedigas advierte del incremento del precio del gas", "Los ciclos combinados garantizan el funcionamiento del sistema", "El céntimo verde para el gas es discriminatorio", and "Comunicado de Sedigas sobre la Resolución de CNC".
- AGENDA:** A small graphic with a calendar icon.
- REUNIÓN ANUAL DE SEDIGAS:** A large banner featuring a photo of four people at a meeting and the text "ACCESO A LAS PONENCIAS DE LA REUNIÓN ANUAL DE SEDIGAS".
- Eventos:** A banner for the "XIV Encuentro especializado SECTOR GASISTA ESPAÑOL" on October 23, with a "Descuento especial para socios".
- Anuario ON-LINE DEL GAS:** A green banner for the online gas yearbook.
- Informe Anual 2011:** A blue banner for the 2011 annual report.

At the bottom, there are four service tiles, each with a right-pointing arrow:

- FORMACIÓN:** A woman writing on a whiteboard.
- CERTIFICACIÓN:** Two people in hard hats reviewing documents.
- CONSUMIDOR:** A man and a woman in a kitchen setting.
- SOCIOS:** A blue abstract graphic.

There are market opportunities that the sector needs to capture



and the association had to go along with the gas companies!!!!

Since 2011, Sedigas has increased its efforts to get to all the gas and energy publics

What did we do?

1. Realise we had to “sell” the role of natural gas in the energy mix



2. Analyse our public and its needs of information

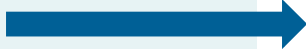
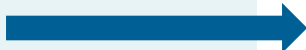


3. Select the information we were going to deliver and choose the tool to do so



DO IT!

Until 2010 the Association communication was focused on providing information to its members

| | Members | Non-members |
|------------------------------|--|--|
| Provide information | Home page | |
| | Gas sector Yearbook  2.000 copies | |
| | Gas Sector Newsletter "Sedigas informa" email | "Gas Actual" review  6.000 copies |
| Promote gas usage | - | |
| Gas safety | - | |
| Gas general knowledge | "Gas Actual" review | |

Since 2010 we have opened our activity to the non-members and domestic sector

| | Members | Non-members | Domestic |
|------------------------------|-------------------------------|-------------------------|-------------------|
| Provide information | Home page | | |
| | Gas sector Yearbook (on-line) | | |
| | Gas Sector Newsletter | "Gas al día" newsletter | |
| | "Sedigas informa" email | | |
| Social networks | | | |
| Promote gas usage | - | Specific seminars | |
| Gas safety | - | "Gas Actual" review | Safety campaings |
| Gas general knowledge | "Gas Actual" review | | |
| | | articles in blogs | articles in blogs |

Increasing Sedigas on-line presence

Home page recently updated

www.sedigas.es

The screenshot shows the Sedigas website homepage. At the top left is the Sedigas logo (a blue flower) and the text 'sedigas Asociación Española del Gas'. To the right, there are links for 'Ahora también en Twitter' and 'ENGLISH VERSION', and a search bar. Below the header is a navigation menu with tabs: ASOCIACIÓN, SOSTENIBILIDAD, PUBLICACIONES, COMUNICACIÓN, NORMALIZACIÓN, ESTADÍSTICAS, ANUARIO, and CONTACTAR. The main content area is divided into several sections: 'Datos del sector' with a table showing demand and price changes; 'Noticias destacadas' with a headline about price increases; 'AGENDA' with a calendar icon; 'SECTOR GASISTA ESPAÑOL' with a 'Desuento especial para socios' offer; 'Anuario ON-LINE DEL GAS'; and 'Informe Anual 2011'. At the bottom, there are four boxes for 'FORMACIÓN', 'CERTIFICACIÓN', 'CONSUMIDOR', and 'SOCIOS', each with a small image and a right-pointing arrow.

| Datos del sector | |
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Twitter @sedigas (since april 2012)

- 345 tweets;
- 351 followers



LinkedIn:recently opened



Positioning in energetic and interesting Blogs



Expanding the number of hits

Digitalisation of Sedigas's quarterly review: from 6,000 copies to who knows how many hits?

Sector Yearbook available on-line; 14.000 hits since 2011

Gas Actual



Keeping the world infomed

Monthly Newsletter for Sedigas members:

Monthly Newsletter entitled '*Gas al Día*' for non-Sedigas members:




Gas safety campaigns


Each autumn and winter, Sedigas promotes Gas Safety Campaigns throughout Spain's Regional Administrations to ensure domestic installations are used properly.

GAS: CONSELLS DE SEGURETAT


CADA ANY l'usuari està obligat a la revisió de la caldera per una empresa habilitada




Comprovi que la flama sigui blava, estable i silenciosa.




Eviti que s'apagui la flama pel vessament de líquids de les cassoles o pel corrent d'aire deixant fluir lliurement el gas pels cremadors.




Si la flama embruta la base de les cassoles és un símptoma de mala combustió. Netegi els cremadors amb productes no abrasius.



Mantingui sempre netes les reixetes de ventilació a l'exterior i en cap cas les obstrueixi amb cap tipus d'element.




En cas d'absència perllongada, tanqui la clau general de pas del gas.



Si nota olor a gas: No encengui la llum ni aparells elèctrics, no truqui dintre del recinte, no fumi. Ventilï i tanqui la clau del gas. Truqui al telèfon d'urgències.

Més informació a fonorma.gencat.cat

Telèfon d'emergències: **112** emergències



Generalitat de Catalunya



¡Recuerde! Las instalaciones se deben controlar cada 5 años

Gas Canalizado: la empresa le notificará el día en que se va a realizar la inspección.

Botellas: el usuario debe contratar la revisión con una empresa instaladora, antes de que venza el plazo.

Por favor...

gas

con responsabilidad

Control periódico de las Instalaciones

CADA

5

AÑOS

y seguridad

Los incidentes en las instalaciones de GAS no son frecuentes, pero debemos poner los medios necesarios para evitar cualquier riesgo.



En las instalaciones individuales sólo se pueden instalar **sistemas estancos y con acciones estancas**.



No almacenar las botellas de gas en zonas próximas a altas temperaturas (fogos, etc.).



Los locales en los que se utilizan **los gases de gas** deben estar ventilados.



En las instalaciones de butano/propano, vigile el **buen estado del regulador y del tubo flexible** así como su caducidad.



Evitar chimeneas del edificio. La salida de humos puede estar obstruida por nidos, hojas, ramas, obras mal ejecutadas, etc.



Vigile que la combustión sea correcta, **removiendo la soplebrilla**.



No obstruya las rejillas ni el tubo de salida de gases de calderas y calentadores.



Si nota olor a gas, cierre la llave general del gas, abra las ventanas, no produzca llamas ni chispas, ni accione interruptores eléctricos y llame al servicio de urgencias.



Evite botones desatados y conexiones de aire que puedan apagar la llama.

Specific seminars to expand gas usage

Seminars to educate and communicate with 'stakeholders' and Administration:

- Gas technologies for the construction sector and the transportation sector
- Audiencies: architects, engineers, promoters, workers of the ministries



Expand gas usage

Until under construction...

- Communication Plan and specific actions aimed at **Developers, Associations, Architects, Cooperatives.**
- Communication Campaign aimed at **consumers/end client** advertising the advantages of gas.
- Communication Campaign with the Public Administration explaining the advantages of **gas solutions in both public and private buildings.**



Thank you