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The Austrian Gas Market – How to ensure Security of Supply?

Ronald Farmer
E-Control

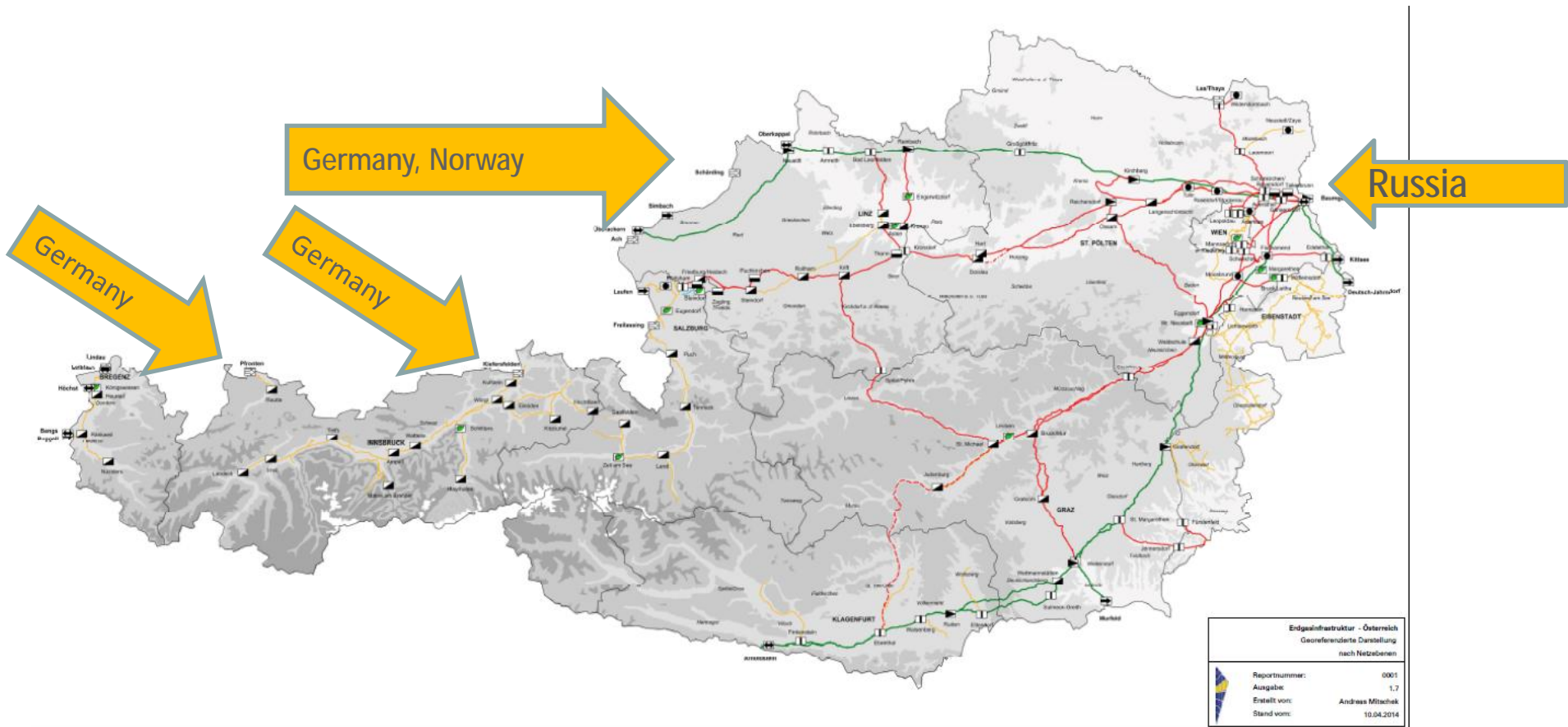
Key Figures of the Austrian Gas Market



- ~ 1,35 mio. gas consumer
- ~ 180 trader/shipper
- 3 market areas
- 2 TSOs / 21 DSOs
- Grid length
~ 2.000 km TS
~ 40.000 km DS
- Max. consumption ~ 2.4 mio. Nm³/h
- Domestic:Transit ratio 1:5
- Domestic producers: OMV E&P and RAG

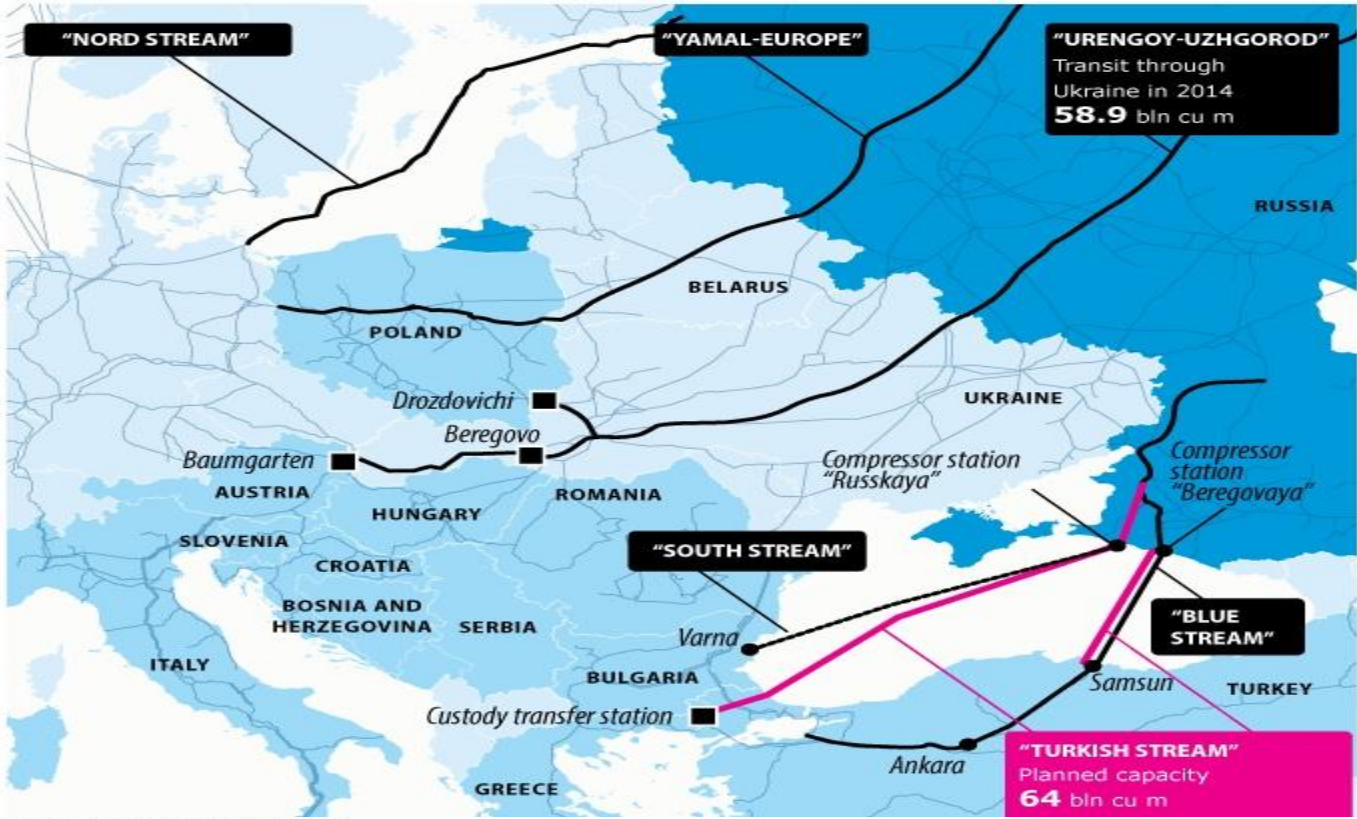


Austrian gas sources

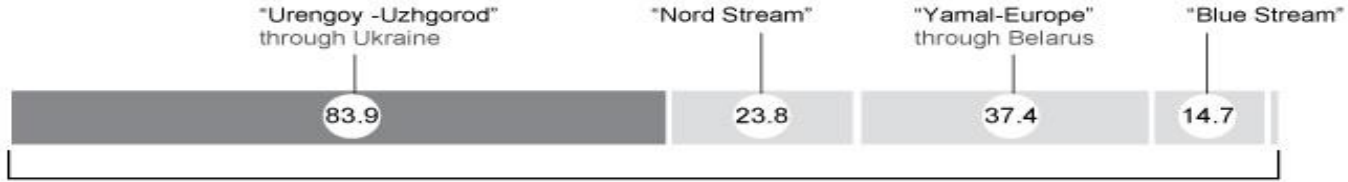


Source: AGGM

Russian gas transit through Ukraine



TRANSIT VOLUMES IN 2013

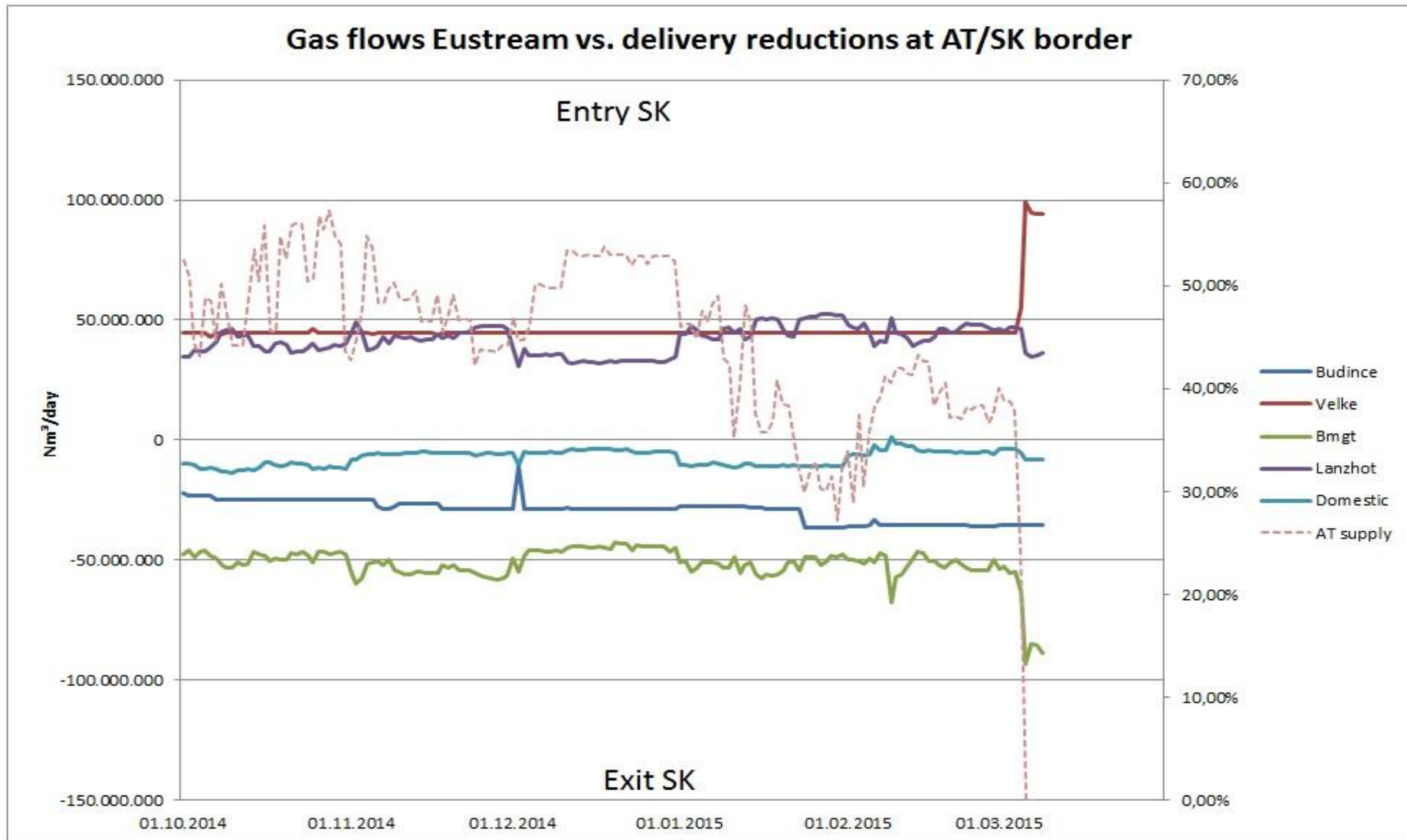


Total: **162.7**

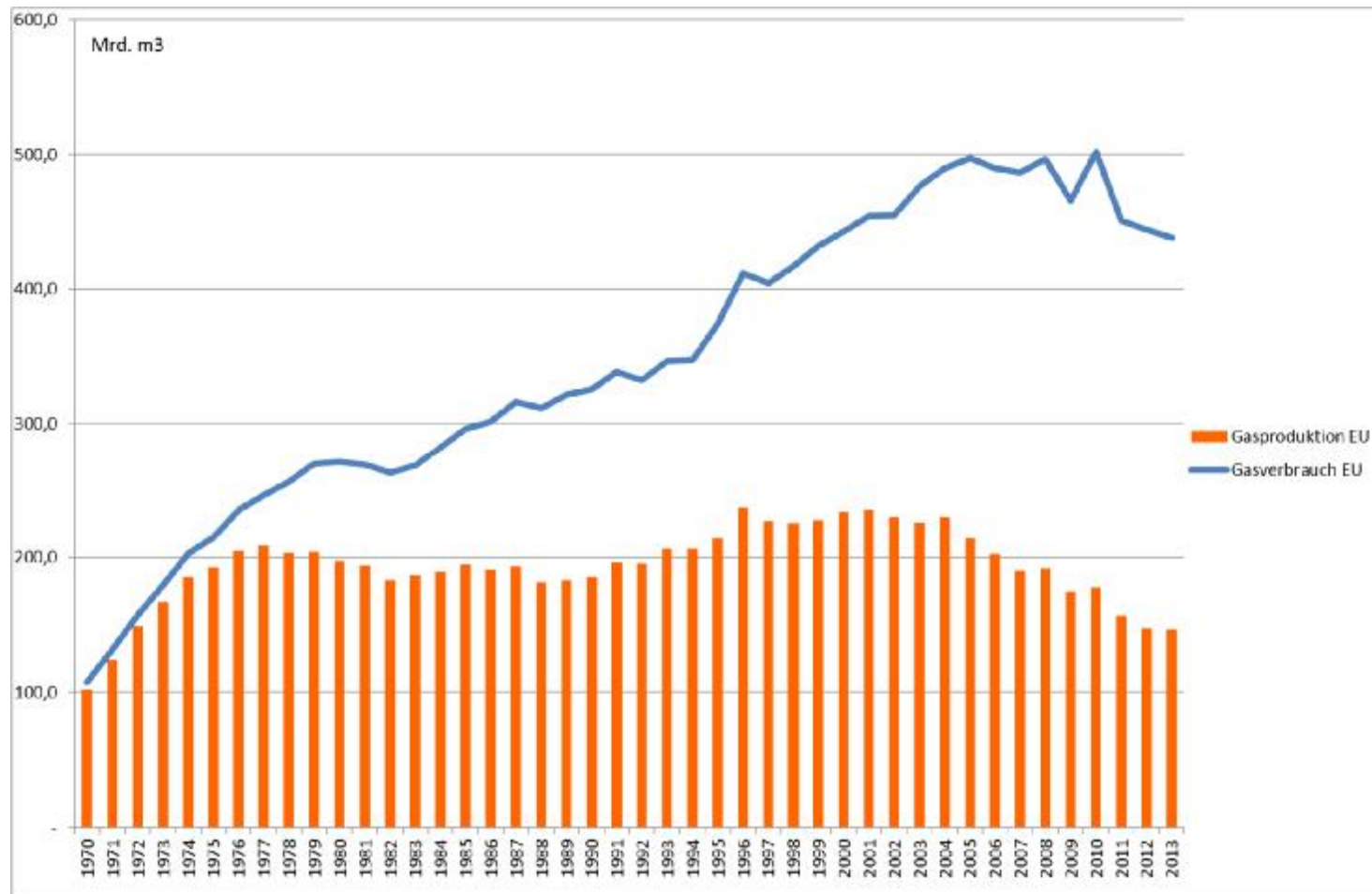
including direct supplies from Russia to Finland

Source: TASS

Gas flows to Baumgarten via Slovakia



EU gas consumption declining – still the need to import gas increases



Quelle: BP Statistical Review of World Energy, Juni 2014, <http://www.bp.com/en/global/corporate/about-bp/energy-economics/statistical-review-of-world-energy.html>; Daten aus Historical data workbook:

Security of Supply ...



What can be done?

Well-functioning MARKETS

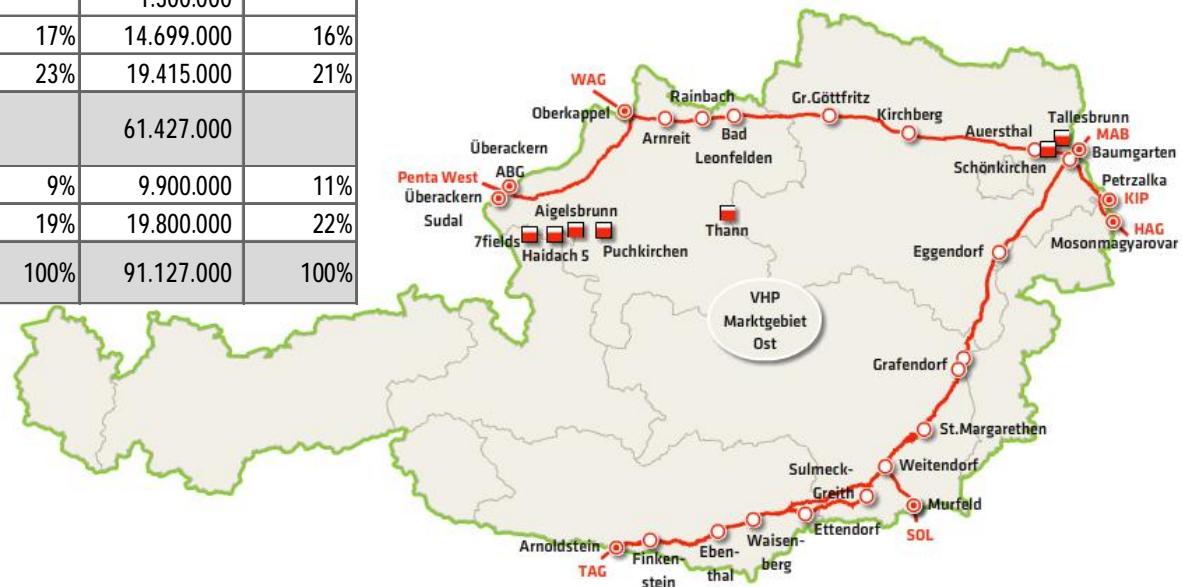


Source: CEGH

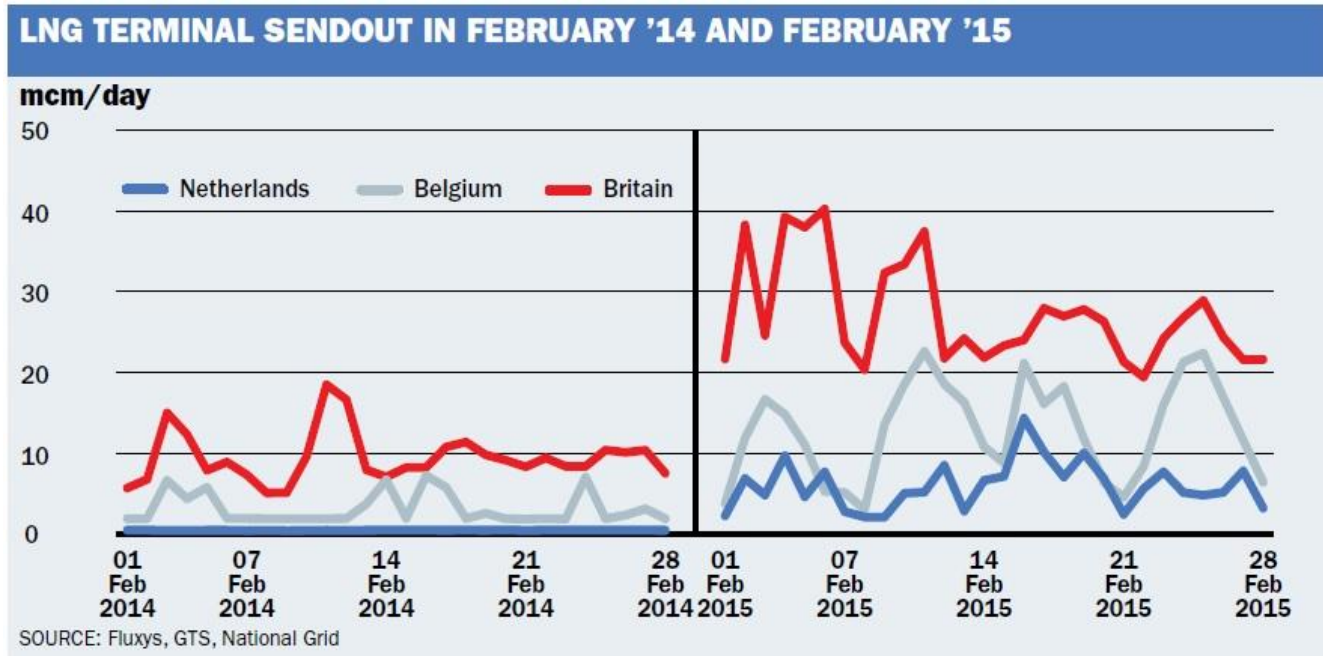
Efficiently used STORAGE capacities



Speicherkapazitäten in Österreich, Stand Juni 2014						
Speicherunternehmen/ Speicher	Einspeicher- rate in MWh/h	Anteil an gesamter Einspei- cherrate	Entnahme- rate in MWh/h	Anteil an gesamter Entnah- merate	Arbeitsgas- volumen in MWh	Anteil an gesamtem Arbeitsgas- volumen
OMV-Schönkirchen	7.306		10.790		20.007.000	
OMV-Tallesbrunn	1.405		1.798		4.496.000	
OMV-Thann	1.293		1.461		2.810.000	
OMV Speicher gesamt	10.004	28%	14.049	32%	27.313.000	30%
RAG-Puchkirchen	5.800		5.800		12.100.000	
RAG-Haidach 5	225		225		1.100.000	
RAG-Aigelsbrunn	562		562		180.000	
RAG-Nussdorf/Zagling	681		681		1.300.000	
RAG Speicher gesamt	7.265	21%	7.265	17%	14.699.000	16%
Eon Gas storage- 7fields	6.742	19%	10.112	23%	19.415.000	21%
An MG angeschlossene Speicher	24.011		31.426		61.427.000	
Astora-Haidach	3.733	11%	4.133	9%	9.900.000	11%
Gazprom-Haidach	7.467	21%	8.267	19%	19.800.000	22%
Summe	35.211	100%	43.826	100%	91.127.000	100%



Need for DIVERSIFICATION



Source: ICIS

!! New infrastructure for new gas sources !!

Improve COORDINATION and COOPERATION

- In- and outside of the EU
- EU relation policy to external energy producers and transiting countries
- Regional cooperation in terms of SoS and solidarity



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