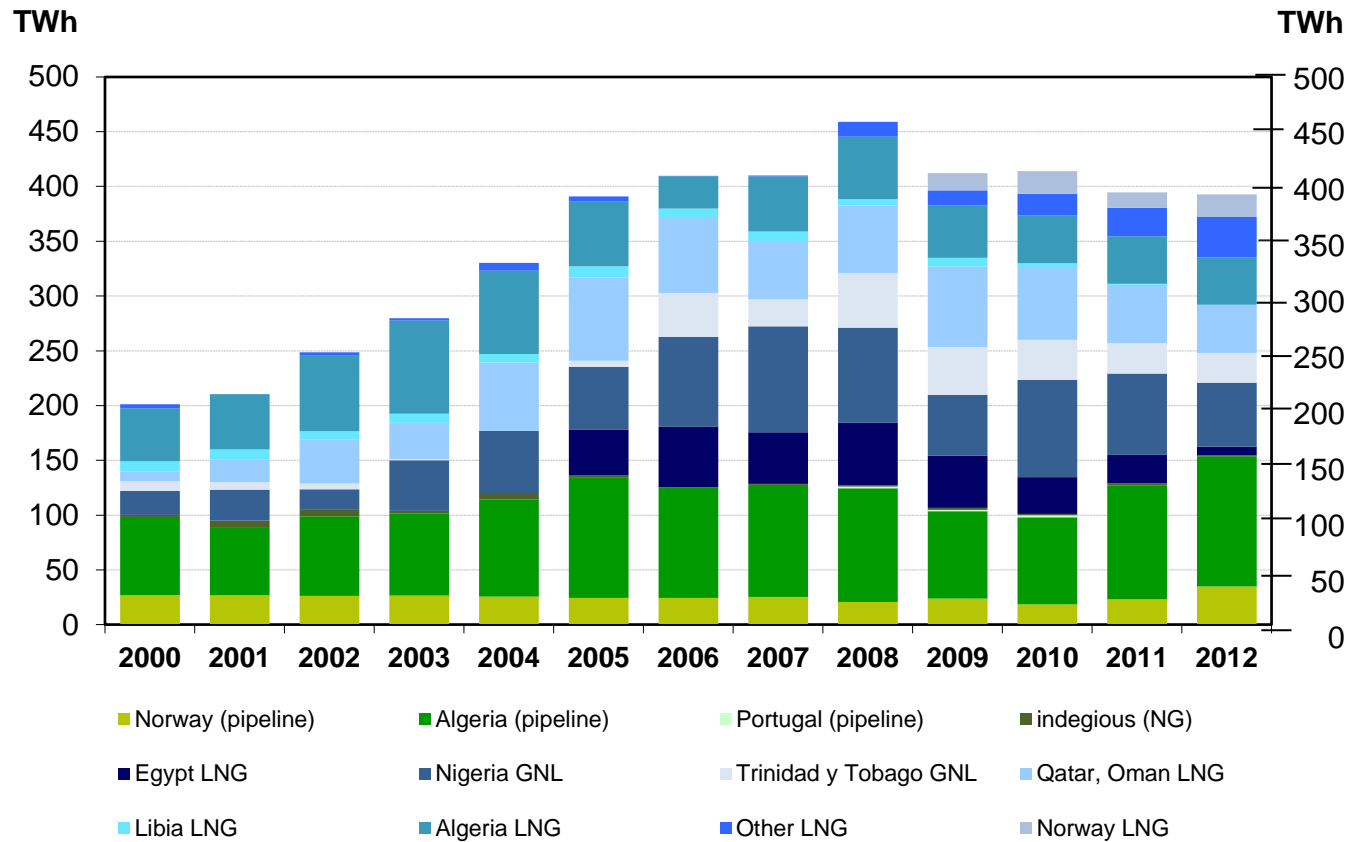


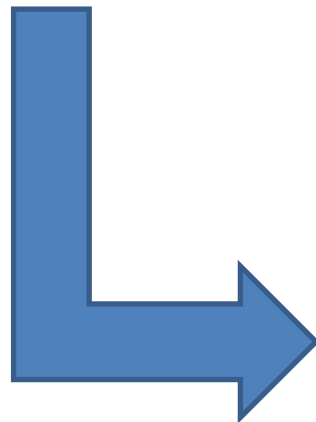
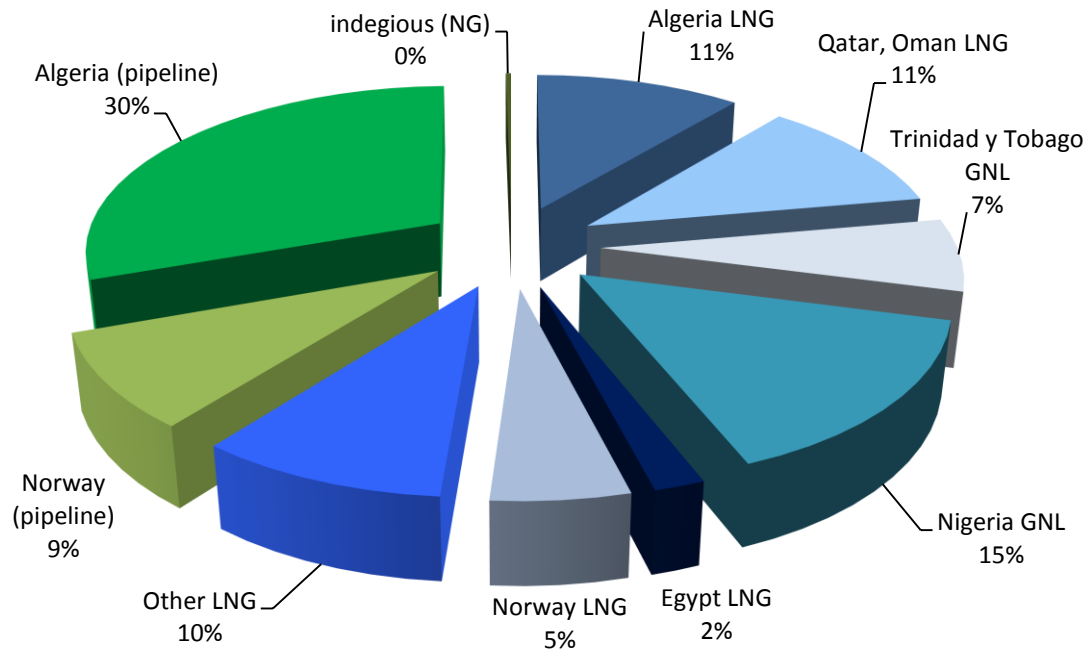
# **Spain Natural Gas Sector: Outlook 2012**

Geneva, January 2013

# Evolution of Supply in Spain

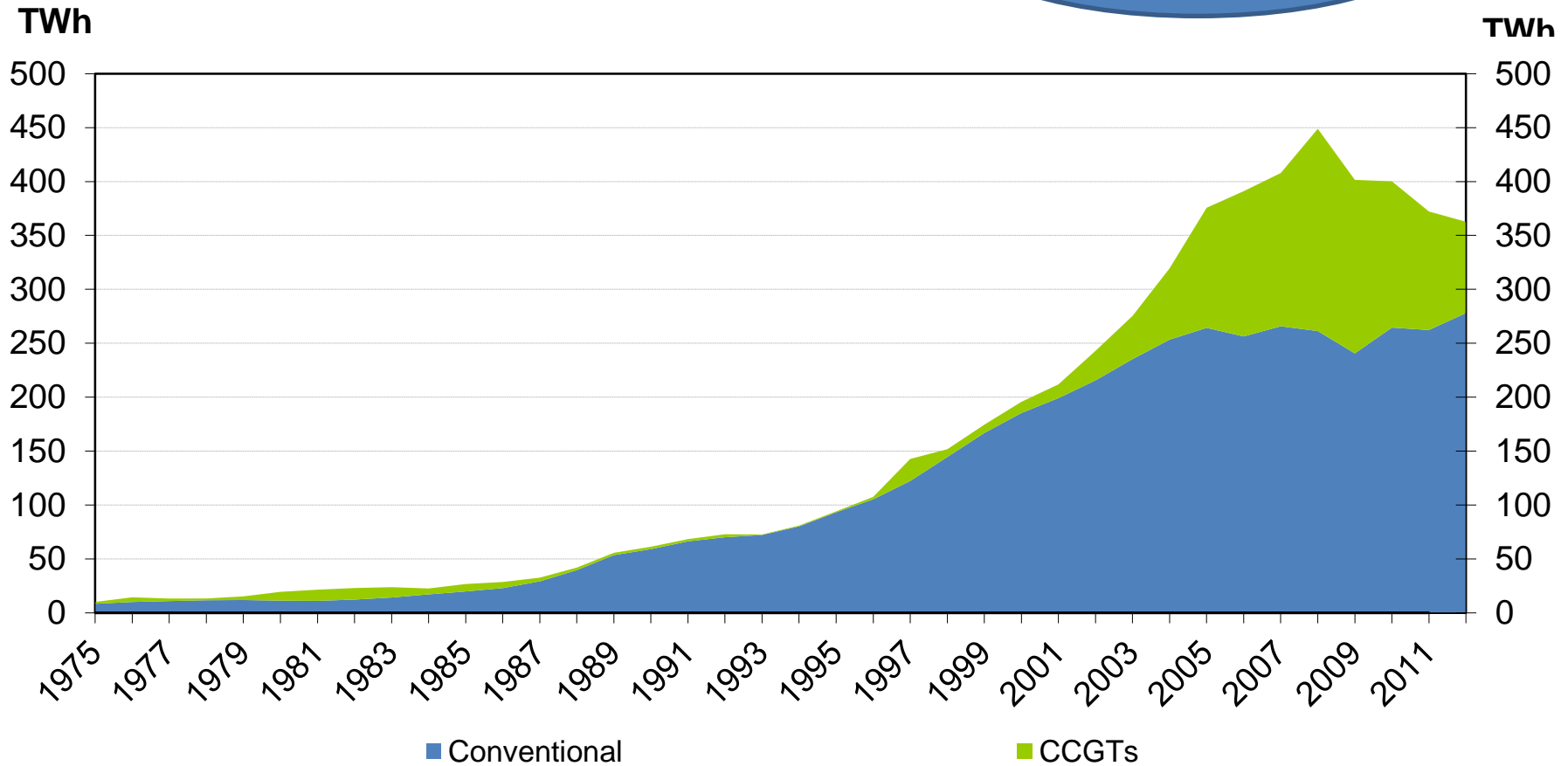


# Origins of Supply into Spain in 2012



# Evolution of gas demand

2012 demand: 363  
TWh



# New infrastructures in operation 2012



- Yela UGS facility
- 400 km pipeline

# South Gas Regional Initiatives – Work Plan 2011-2014

Areas of work	Responsible	Starting	Deadline
Capacity allocation mechanisms (CAM)			
I.1. OSP France-Spain: annual allocation of short-term capacities	TSOs	Nov. (yearly)	Dec. (yearly)
I.2. CAM harmonisation proposal between Spain and Portugal	NRAs-TSOs	Jan. 2011	Jun. 2012
I.2. CAM harmonisation proposal in the whole region	NRAs-TSOs	Jan. 2012	Dec. 2013
I.3. Set up a common TSO Allocation Platform: Roadmap and Implementation	TSOs	Jul. 2012	Dec. 2014
Congestion management procedures (CMP)			
II.1. CMP harmonisation proposal between Spain and France	NRAs-TSOs	Jan. 2011	Dec. 2012
II.2. CMP harmonisation proposal between Spain and Portugal	NRAs-TSOs	Jan. 2012	Jan. 2013
Investment in new infrastructure. Ten-Year Network Development Plans and projects of common (European) interest			
III.1. Regular update and publication in CEER website of project status of OS 2013 and 2015	TSOs-NRAs	Dec. (yearly)	Jun. (yearly)
III.2. Drafting of the South Regional Investment Plan 2012	TSOs	Jul. 2011	Jan. 2012
III.3. Feedback to ENTSO-G on contents and methodology of the regional investment plan	NRAs	Jan. 2012	Jul. 2012
III.4. Input to ENTSO-G for the Community-wide TYNDP 2013	TSOs	Jan. 2012	Jan. 2013
III.5. Creation of a working group in the region in order to test the process of PCI identification	NRAs -TSOs	Mar. 2012	Dec. 2012
III.6. Drafting of the South Regional Investment Plan 2014	TSOs	Jan. 2013	Jan. 2014
Security of Supply (SoS)			
IV.1 Periodically update on progress on Regulation 994/2010 implementation	Competent Authorities	Permanent	
IV.2 Promotion of market's participation through public consultations in the development of preventive action plans	NRAs	Permanent	
Balancing			
V.1. Contributing to the FG and NC, by raising the regional experience and lessons learned	NRAs-TSOs	Permanent	
V.2. Investigation of the use of the gas markets in the region for balancing purposes	NRAs-TSOs	Jun. 2012	Jun. 2013
V.3. Analyse the current configuration of balancing zones and possible merging of certain areas	NRAs-TSOs	Jan. 2013	Dec. 2013
V.4. Pilot project for a common balancing platform in the three countries	TSOs	Jan. 2014	Dec. 2014
Tariffs			
VI.1. CNE-ERSE joint study on tariff regimes in Spain and Portugal	NRAs	2010	Dec. 2011
VI.2. CNE-ERSE proposal for tariff harmonization in Spain and Portugal	NRAs	2010	Dec. 2012
V.I3. Further studies to evaluate the current tariff structures and propose improvements	NRAs	Jan. 2012	Dec. 2012
Interoperability			
VII.1. Contribute with the regional experience to the development of the FG and the NC	NRAs-TSOs	Permanent	
VII.2. Analysis of interoperability aspects and procedures that need to be harmonised among the three countries (in line with the FG-NC)	TSOs	Jan. 2013	Jan. 2014
VII.3. In particular, harmonisation of gas day, communication protocols between TSOs, quality standards, programming and nomination schedules, etc.	TSOs	Jan. 2014	Dec. 2014
Implementation of the 3 <sup>rd</sup> Package			
VII.1. Supervision of compliance with the implementation of the new provisions on transparency in the Regulation 715/2009/CE, for transmission, LNG and storage infrastructure operators	NRAs	Sep. 2011	Jun.. 2012
Developing hub-to-hub trading in the South region			
IX.1. Hub development	NRAs-TSOs-	Jan.2013	Dec. 2013
	stakeholders		
IX.2. Hub-to-hub gas trading in the region	NRAs-TSOs-stakeholders	Jan.2014	Dec. 2014