How will recently completed or planned pipelines improve gas supply and energy security in Europe?

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Gas imports: Europe has choices
Who is able to fill the increasing supply gap?

Projected shares 2017 vs. 2030

- **EU 28** (Domestic production): 125 bcm in 2017, 60 bcm in 2030
  - 25% decrease to 10-16%

- **Norway** (Pipeline): 375 bcm in 2017, 420 bcm in 2030
  - 24% increase to 16-24%

- **Russia** (Pipeline): 32% increase to 28-36%

- **North Africa/ Caspian Sea** (Pipeline): 8% increase to 8-12%

- **Others** (incl. LNG): 11% increase to 20-28%

Source: IHS, Wintershall
Gas imports: Europe has choices
We trust in the European market

- European regulation sets the rules of the market
- Intra-European gas market has become reality
- Buyer's market for the last couple of years; customers are benefitting from low prices
- No dependencies on individual producers
- Trading spots determine the prices
- New infrastructure offers options, but causes no obligations

Source: ENTSOG, TYNDP 2017

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Diversification of transport routes incl. Nord Stream 2
Every pipeline counts and should be welcome

- Direct connection links between vast gas reserves and the European market are crucial
- Nord Stream 2: shortest route possible to the new natural gas fields in the North of Russia
- Intensifying competition between different sources, routes and costs throughout Europe
- Russian gas has environmental advantages compared to LNG: GHG intensity during pipeline transport from Siberia to Europe via Nord Stream significantly lower (2.4 to 4.6 times) than in usual LNG value chains.

Source: Gazprom
A contribution to climate protection
New pipelines help to reduce CO₂ emissions

Source: Eco-Efficiency Analysis created by BASF SE and TÜV Rheinland LGA Products GmbH