



SE Europe gas markets & infrastructure

13th Gas Forum, September 2018

SE Europe – gas market characteristics; market principles; policy delivery observations



MARKET CHARACTERISTICS

- Several small 3 bcma markets; one large market (Romania) market; no market in Albania
- High import dependency (not Romania)
- Isolated 'island' markets – very little interconnectivity
- No pricing point
- Market dynamics: supply/demand; changing flow patterns; DG Comp vs Gazprom

PRINCIPLES

- Policy goals: security of supply; building a functioning market
- Key principle: policy delivery requires interconnected markets
- Interconnectivity: hardware & software

OBSERVATIONS

- Record of delivery

SE Europe – policy delivery observations



CESEC priority projects

- 9 gas infrastructure projects

FINANCIAL ASSISTANCE

- CEF
- Regional development funds
- Banks

