

Picture courtesy of Gas Connect Austria

CROSS-BORDER INFRASTRUCTURE CHALLENGES

Based on the Yearly Outlook 2022/2023 analysis

17TH Gas Forum

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Winter Supply Outlook

Summer Supply Outlook

Yearly Supply Outlook



Full disruption of gas supply from Russia for the entire gas year



Available on ENT SOG website



COOPERATION

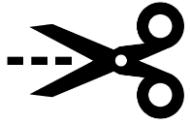
All countries cooperate to:

1. **Avoid the risk** of demand curtailment
2. **Share the risk** of demand curtailment if infrastructure allows for it
3. Inject to **storages** and withdraw **in optimal way**
4. Use their **import infrastructure in coordinated way** (especially LNG terminals)



ALTERNATIVE SUPPLY

ENHANCED CAPACITIES



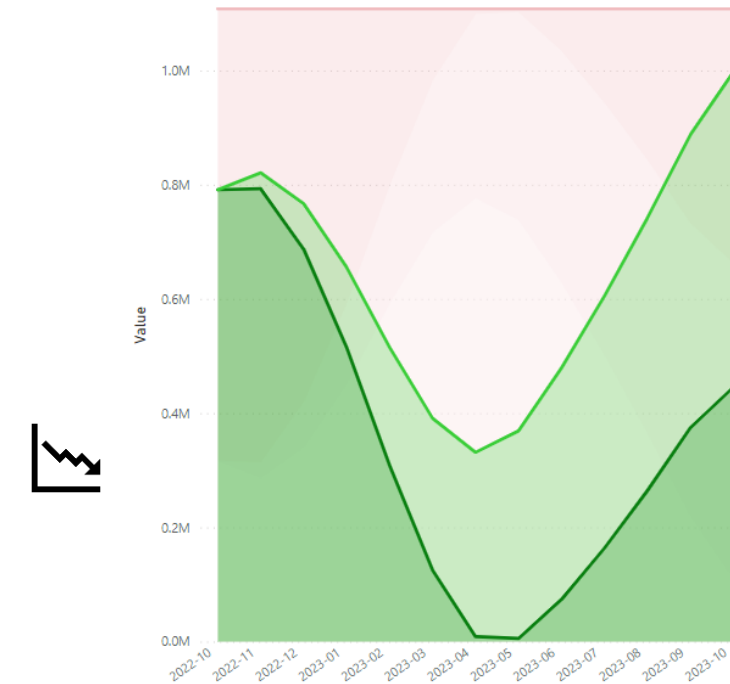
DEMAND RESPONSE

As a result of organic reduction due to prices or policy-based demand measures would be needed to ensure security of supply and preparedness



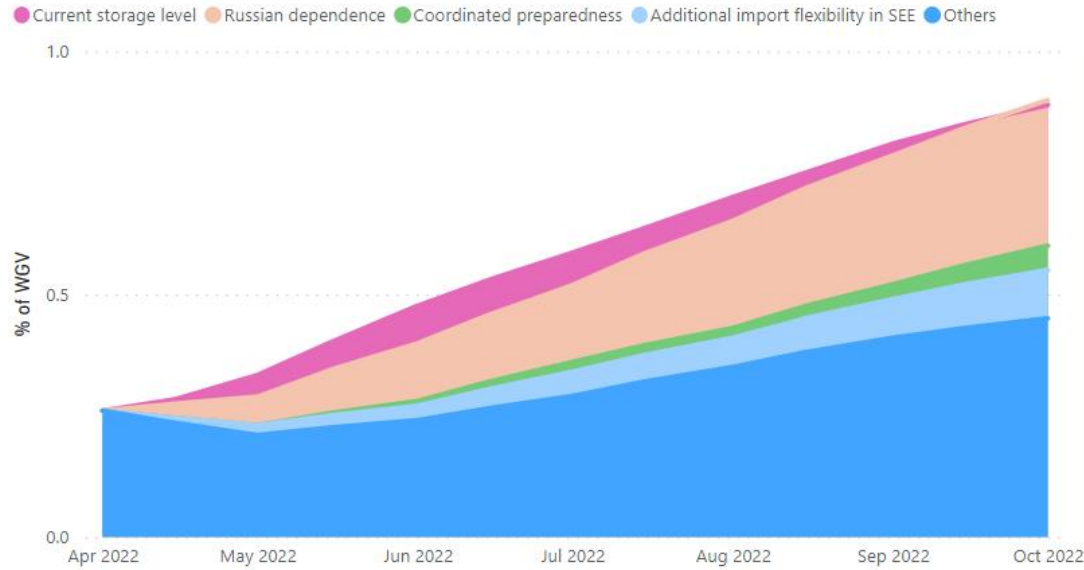
PREPARDNESS

- 100% UGS in EU ~30% of winter demand; ~100 bcm
- Gas in storage pressure withdraw capacity
- Storages are key for peak demand situation

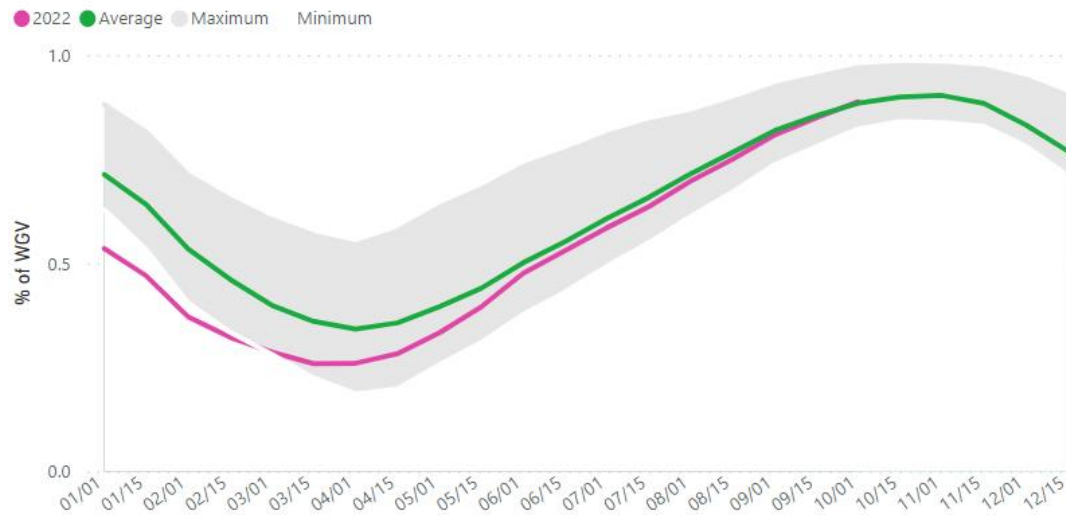


Seasonal Outlook Monitoring

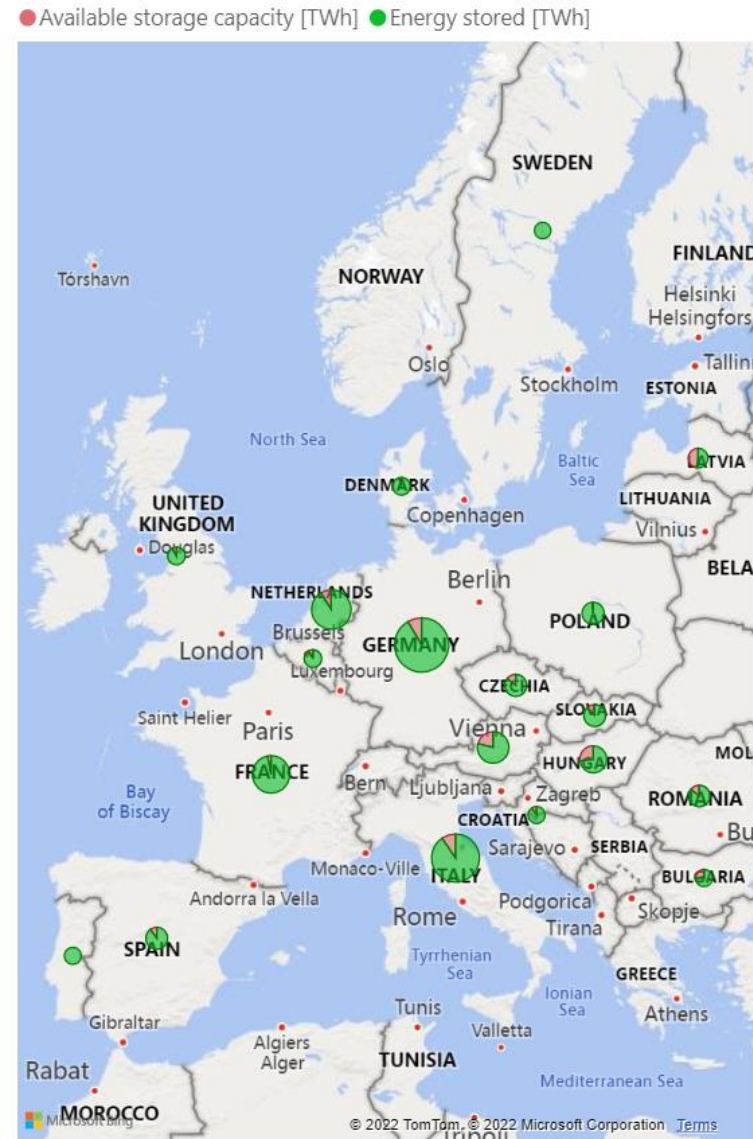
Storage evolution vs SSO scenarios



Storage evolution vs 2015-2020



Storage levels



Data source
[ENTSOG Seasonal outlooks](#)
 and
<https://aasi.aie.eu/#/>

Working Gas Volume

Country	Value [TWh]	Value [bcm]
Austria	95.48	8.7
Belgium	9.00	0.8
Bulgaria	6.27	0.6
Croatia	5.22	0.5
Czechia	35.99	3.3
Denmark	9.08	0.8
France	131.60	12.0
Germany	237.20	21.8
Hungary	67.70	6.2
Italy	197.73	18.0
Latvia	21.80	2.0
Netherlands	145.30	13.2
Poland	36.40	3.3
Portugal	3.57	0.3
Romania	32.99	3.0
Slovakia	36.00	3.3
Spain	35.00	3.2
Sweden	0.01	0.0
UK	9.63	0.9

*unit in bcm is indicative: value in TWh / 11



Thank you for your attention

ENTSOG - European Network of Transmission System Operators for Gas

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