

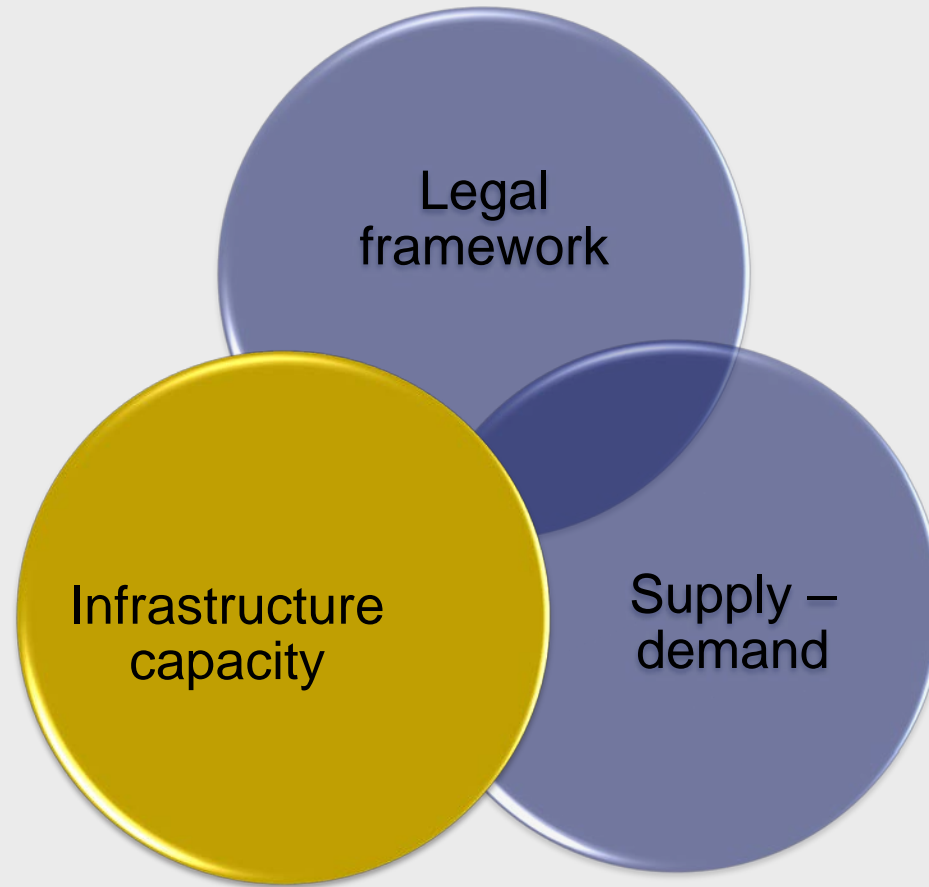
The background is a satellite-style image of Europe at night, with city lights visible. Overlaid on this are numerous glowing blue lines that represent energy infrastructure, such as gas pipelines and power grids, connecting various points across the continent.

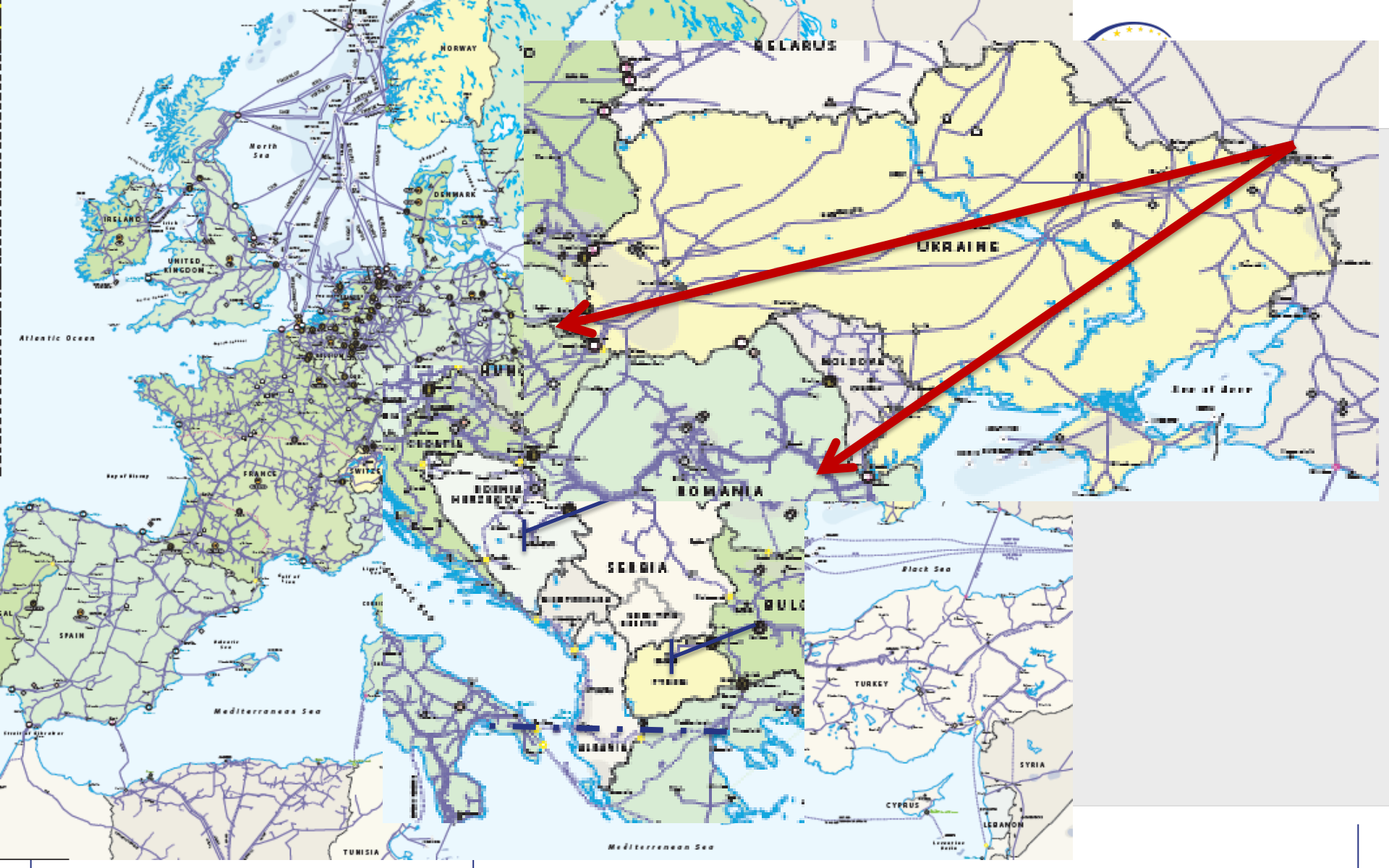
## *Gas infrastructure framework for the Contracting Parties*

Karolina Cegir

Vienna, 8 February 2016

# *Gas market to be developed....*





Development of national network  
Being part of big international projects  
Interconnectors with (all) neighbours

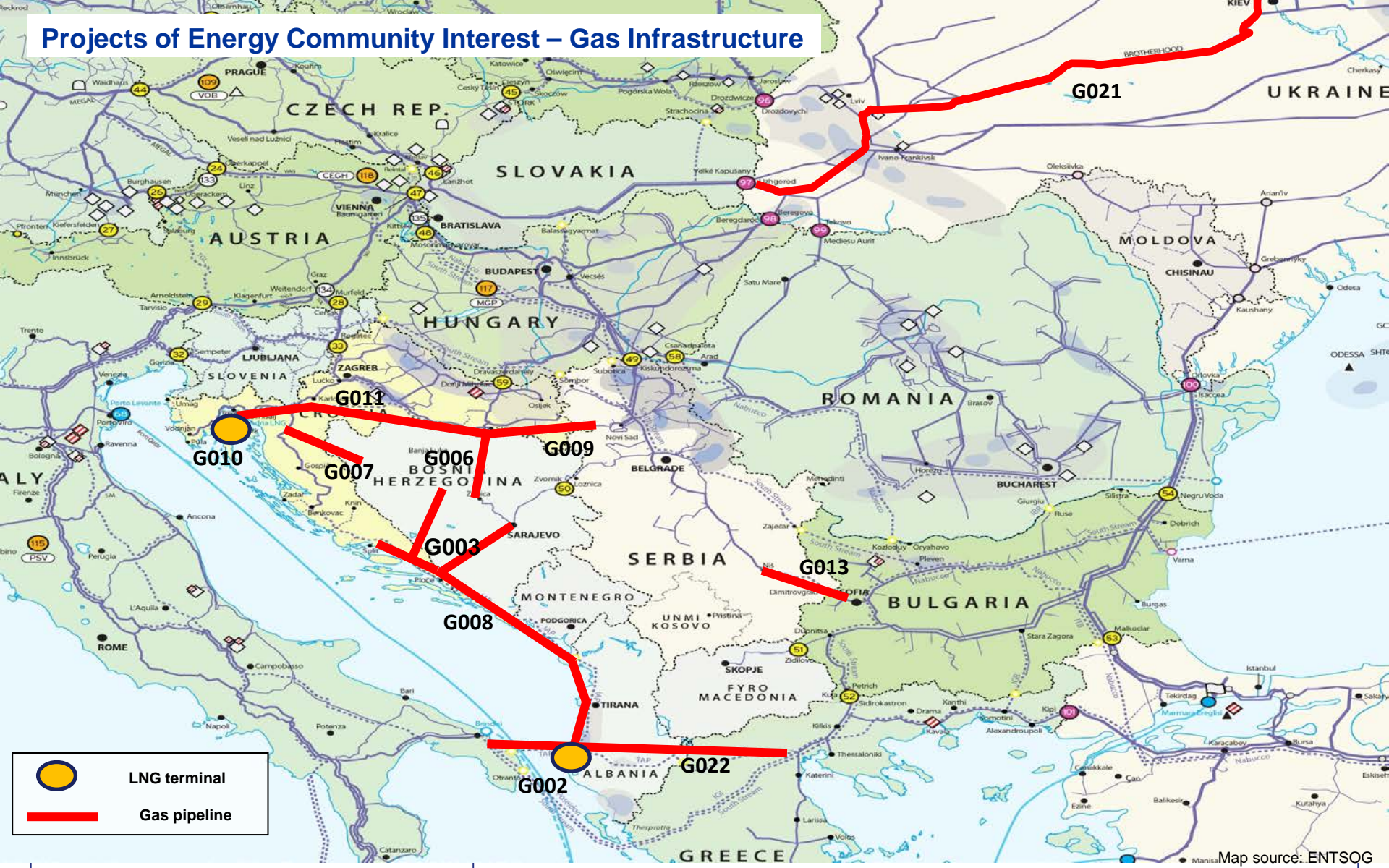
To use huge existing transit capacity  
To diversify supply


# Projects of Energy Community Common Interest



- Energy Community Strategy adopted by the Ministerial Council in 2012
- Energy Strategy Task Force to prepare a list of Projects of Energy Community Interest (PECIs)
- TF was assisted by the Consultant
- Similar methodology as for PCI in EU; CBA in line with (proposed) Regulation 347/2013
- The List adopted by the Ministerial Council in 2013
- 23 gas projects submitted – 10 listed as PECIs

# Projects of Energy Community Interest – Gas Infrastructure



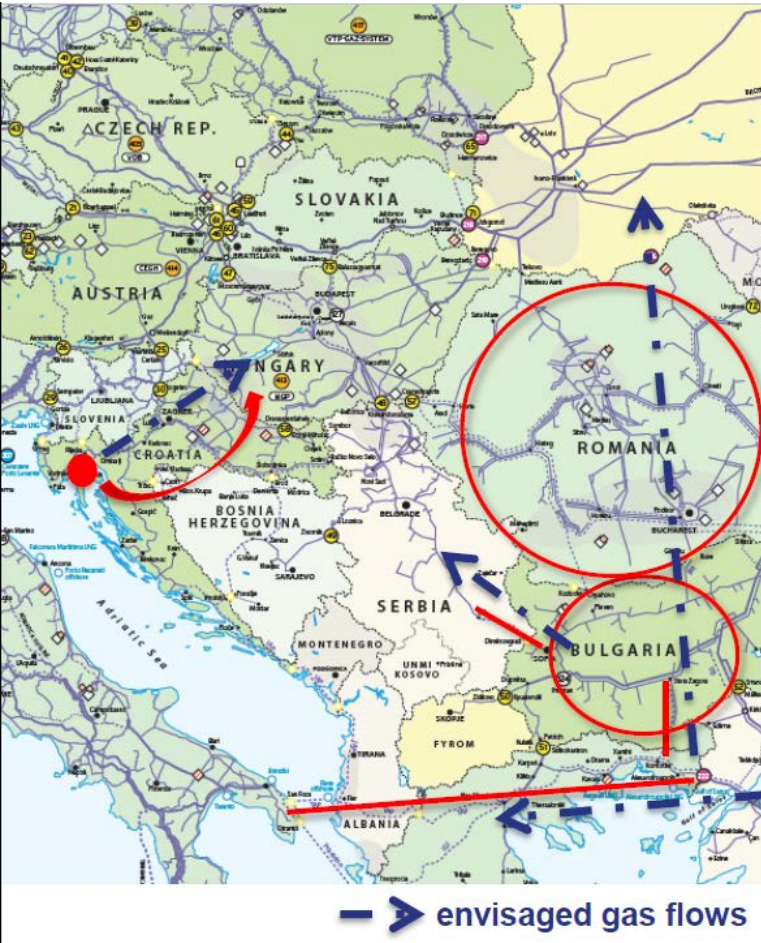
 LNG terminal

 Gas pipeline



- **October 2014** – stress test report
- **December 2014** – political declaration
- **February 2015** – terms of reference
- **July 2015** – MoU signed
  - EU | AL | AT | BG | FYROM | GR | HR | HU | IT | ROM | SI | SK | SRB | UA | MD
- **Implementation Phase**
- **Spring 2016** – 3rd High-Level wrap-up

# CESEC – missing infrastructure and market elements for security of supply



- Based on 2014 stress test: (7) **6 priority projects** to increase SoS via strengthened interconnection
  - TAP
  - Interconnector GR-BG (IGB)
  - Interconnector BG-SRB
  - System reinforcement BG
  - System reinforcement ROM
  - LNG Terminal HR
  - LNG evacuation system towards HU





- A) Selection of a limited number of key projects benefiting the CESEC region
- B) Identification and addressing of project-specific challenges
- C) The financing aspects, including the role of EIB and EBRD
- D) Addressing the market integration challenges
  - On access rules
  - On free flow of gas
  - On competition and the role of the State in markets

# CESEC – translating into practical progress



| MoU criteria  | National relevance  |
|---|---|
| <b>Ensuring transparent and non-discriminatory third-party access</b>   | Establish capacity allocation mechanisms and congestion management rules allowing TPA in forward and reverse flow |
|   | Establish market-based balancing mechanisms   |
|   | Develop transparent and non-discriminatory tariffication rules that do not distort trade across borders           |
| <b>Ensuring free flow of gas and provision of competitive framework</b> | Remove legal or contractual barriers to competition   |
|   | Ensure barrier-free market entry  |
|   | Optimise actual capacity use in both directions, including backhaul   |
| <b>Infrastructure related measures</b>                                  | Adopt interconnection agreements  |
|   | Provide a cross-border cost allocation mechanisms in line with Regulation (EU) 347/20                             |
|   | Ensure harmonised framework of operation of interconnected EU MS- EnC CP systems                                  |
| <b>Measures required for market integration</b>                         | Discuss possibilities to integrate gas markets with neighbouring EU and EnC gas markets                           |
| <b>Cross-cutting measures</b>   | Ensure independence of national energy regulatory authorities based on pre-defined indicators                     |
|   | Unbundle and certify transmission system operator in line with the Third Energy Package                           |
|   | Apply for observer status in ACER based on a positive opinion of the European Commission                          |
|   | Increase effectiveness of national administrative authorities, including for competition and State aid            |

*Process is going on....*



Regulation 347/2013 adopted for the Energy Community by the Ministerial Council in October 2015

Preparation for PECI list update

# Gas infrastructure framework



*Third Energy Package – to be implemented*

*TSO-TSO cooperation in different frameworks*

*RA-RA cooperation in different frameworks*

*Cross border issues*

*SoS cooperation*

*Regional initiatives, EU initiatives*

*EU legislative framework spread over the Energy Community*

*IFIs and their views/support*

*Gas in national energy mix*

*Gas in global picture*

The background is a satellite-style image of the Earth at night, showing city lights. Overlaid on this are numerous glowing blue lines that represent energy transmission or a network, curving across the globe.

*Thank you  
for your attention!*

[www.energy-community.org](http://www.energy-community.org)