

Need for reforms in Ukraine's gas market

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UKRAINE ENERGY MARKET OBSERVATORY 01/2024 – high level assessment of the status quo of Ukraine's gas market and recommendations for its sound improvement and structural transformation published 24 January 2024

Re-establish (once promising) gas market

- **Necessary roadmaps for reforms**
- **Investigate better alternatives to secure gas supplies**
- **Rectify non – compliances**
- **Reduce state intervention**

- The post-2024 (no) transit outlook
- **Unlocking storage business opportunities**
- Exploring (untapped) biomethane production; green hydrogen in the future

Recommendations

- Roadmaps for abolishing the export ban on gases (including renewable gases)
- Roadmap to reform the PSO
- Implementation of Network codes (BAL, TAR, etc) and SoS acquis
- DSO sector: ensure unbundling; cost-reflective tariffs – new model for DSOs
- Adopt decarbonisation/H2 strategies /framework for biogases
- Future of infrastructure in a (more) decarbonised sector – new business model for network operators

Ukraine Energy Market Observatory note 03/24 as of 20 March - compliance assessment of the draft amendments to the Gas Storage Code

Assessed against the Gas Regulation provisions related to

**Third-party access
capacity allocation, congestion management
Transparency
trading rights.**


Praise for the initiative - NERC to take recommendations into account



THANK YOU FOR YOUR ATTENTION

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