

# 19<sup>th</sup> Energy Community Gas Forum

---

NH Danube City Hotel  
Wagramer Strasse 21  
Vienna, Austria

Chaired by the European Commission

## Overview

---

### Monday, 16 September 2024

13:00-14:00 welcome lunch

14:00- 18:30: Forum Day 1

Cocktail reception

### Tuesday, 17 September 2024

9:00-14:00: Forum Day 2

13:00-14:00: Farewell Lunch

## Program – Day 1

### Monday, 16 September 2024

---

**13:00 Welcoming Lunch and registration**

**14:00**

**Welcome**

DG ENER, European Commission

**Keynote Speech:**

Artur Lorkowski | Director, Energy Community Secretariat

**14:30 Session I: delivering higher security of gas supplies**

Since 2022, the EU and Energy Community faced significant challenges due to the war in Ukraine and the subsequent energy crises. Notably, total Russian gas pipeline imports plummeted to cca 30 billion cubic meters (bcm) per year from the pre-crisis level of 155 bcm, representing just cca 8% of all EU pipeline gas imports. When the contract with Russia expires at the end of this year, the transit of gas pipelines via Ukraine will halt. The decreased reliance on Russian fossil fuels tightens the gas supply landscape in the region and as such, it is essential to secure and diversify gas routes. Equally important, we must ensure adequate gas storage ahead of winter.

The targets set by Regulation (EU) 2022/1032 (the Storage Regulation), adopted by the EU and the Energy Community, are designed to enhance supply security and ensure proper certification of storage system

operators. These legally binding targets complement the existing Security of Gas Supply Regulation (EU) 2017/1938 and amend Regulation (EC) 715/2009, addressing critical issues and strengthening the region's energy resilience.

The panel will discuss the state of play related to the gas security situation in Europe, the consequences of the Ukrainian transit halt, the need to implement of the Storage and the SoS Regulation, and the opportunity and challenges posed by the opening of other supply routes to the Energy Community region.

Speakers:

- Mr. Dmytro Lyppa, Gas Transmission System of Ukraine, GTSOU
- Mr. Roman Maliutin, Ukrtransgaz, UTG
- Ms. Nolina Pomparau, Ministry of Energy, Moldova
- Mr. Hendrik Pollex, ENTSOG

Impulse statement and moderator: Predrag Grujicic, Energy Community Secretariat

#### **16:00 Networking Coffee**

#### **16:30 Session II: state of the gas market and regulatory insights**

In 2023, gas demand in Europe decreased, registering a 20% decline compared to 2021. The reduction in Russian gas imports, coupled with diversification efforts and market adjustments, led to a significant drop in gas prices to around 40€/MWh, down from over 300€/MWh in the peak days of 2022. Storage levels at their historic highs also led to decreases in wholesale prices.

New LNG import terminals and additional gas transportation capacity eased the network congestions that drove price differences to record highs in 2022. The likely end of the Ukraine gas transit agreement, coupled with potentially increasing costs of cross-border trade, could disrupt regional gas balances, calling for preparedness and regional solutions. In some countries, the state has made interventions in the functioning of the market. The level of transmission tariffs when exploring new gas routes becomes essential.

This session takes stock of the current gas market developments in the EU and the Energy Community Contracting Parties, focusing on third-party access, firm capacity offers, and the effects of transmission tariff changes in the region on future gas flows.

Panelists:

- Ms. Elena Stratulat, ANRE, Moldova (Energy Community markets)
- Mr. Aleksandar Popadic, AERS, Serbia (NC on transmission tariffs)
- Mr. Joaquin Garcia Gimenez, ACER (EU market monitoring)
- Mr. Martin Jirusek, Masaryk University (State involvement in energy markets, EU experience)

Impulse statement and moderator: Branislava Marsenic, Energy Community Secretariat

#### **17:45 Case study: Unlocking the efficient utilisation of the Ukraine-Moldova interconnection points at the Trans Balkan Pipeline**

- Georg Fischer, WECOM

#### **17:55 Snapshot: Certification of Vestmoldtransgaz**

- Mr. Alexei Taran, ANRE
- Ms. Smaranda Miron, Energy Community Secretariat

#### **18:20 Conclusions / Close of Day 1**

DG ENER, European Commission

#### **18:30 Cocktail Reception**

## **Program – Day 2**

**Tuesday, 17 September 2024**

---

#### **09:00 Opening**

#### **09:05 Session III: Towards decarbonization of the gas sector – stepping up the game**

The EU adopted the hydrogen and decarbonized gas market package, which will govern the gas and hydrogen sectors (including biogases, infrastructure, sustainability verification) in the future decades. The consequences will be spelled out to the natural gas and future hydrogen sectors in the Contracting Parties. The consideration of infrastructure for new gases has not yet gained momentum, which was visible during the recent process of selecting Projects of Energy Community Interest (PECI) in the Energy Community.

The Contracting Parties are committed to combating methane emissions, which should be pursued with the decarbonization agenda. Promising biomethane plans in Ukraine have been halted due to a lack of a clear framework for sustainability verification, which would enable cross-border trade and future transformation of the energy sector in Ukraine and other Contracting Parties.

#### Panelists:

- Ms. Karolina Cegir, Energy Community Secretariat
- Mr. Davide Rubini, Biomethane Industrial Partnership
- Ms. Marina Delegan, British Embassy in Vienna
- Mr. Georgii Geletukha, Bioenergy Association of Ukraine
- Ms. Ms Hanna Zamazieieva, SAE

Impulse statement and moderator: Justin Goonesinghe, USAID Ukraine Energy Security Project

#### **10.30 Snapshot: How to make the best use of the PECI/PMI process in the gas(es) markets**

- Mr. Davor Bajcs, Energy Community Secretariat

#### **11:00 Networking Coffee**

### **11:30 Panel Debate IV: New supply and trading patterns in Central and South East Europe with improved transparency**

During the gas crisis, it became evident that functioning gas markets play a substantial role in the security of supply for countries and the region. Supply patterns of underlying gas markets reoriented themselves significantly, and historical supply patterns have started to change and are continuing to change. This was reflected by increased spreads and congestion, especially in some parts of the region. The development of liquid gas exchanges, standardized trading, and clearing is reaching the Contracting Parties.

Panelists:

- Mr. Andrii Prokofiev, GTSOU
- Ms. Agneta Kutcelim, UTG
- Mr. Mitja Maletin, (LNG market evolution) ACER
- Mr. Septimiu Rusu, BRM
- Mr. Gregor Weinzettel, (development of gas exchanges and the importance of clearing systems) Energy Community Secretariat

Impulse statement and moderator: Aura Sabadus, ICIS

### **12:45 Snapshot: REMIT in the Energy Community**

- Mr. Arben Kllokoqi, Energy Community Secretariat

### **13:15 Conclusions**

### **13:30 Closure of the Forum and Farewell Lunch**