



Picture courtesy of Bayernets

# From the perspective of the transmission system

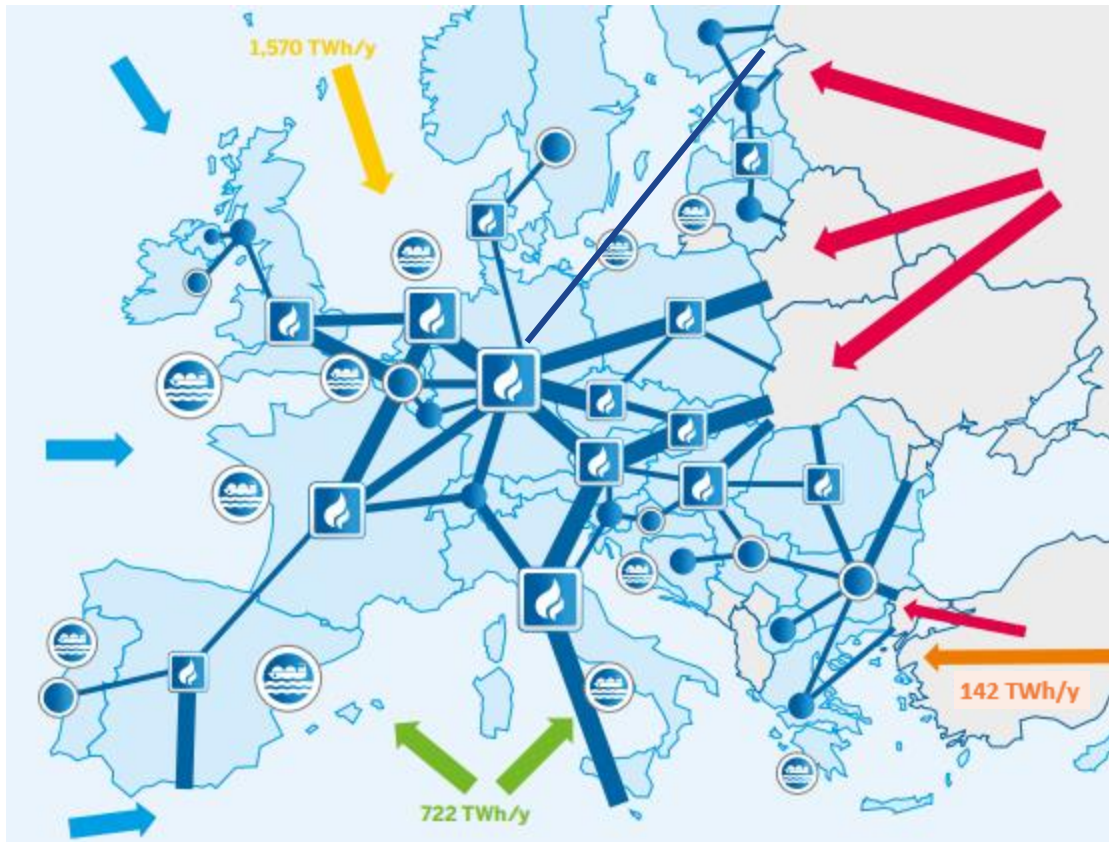
## Session 3: Services and Tools for LNG Market Expansion

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# LNG availability for CEE & WB before and after invasion

# Infrastructure development

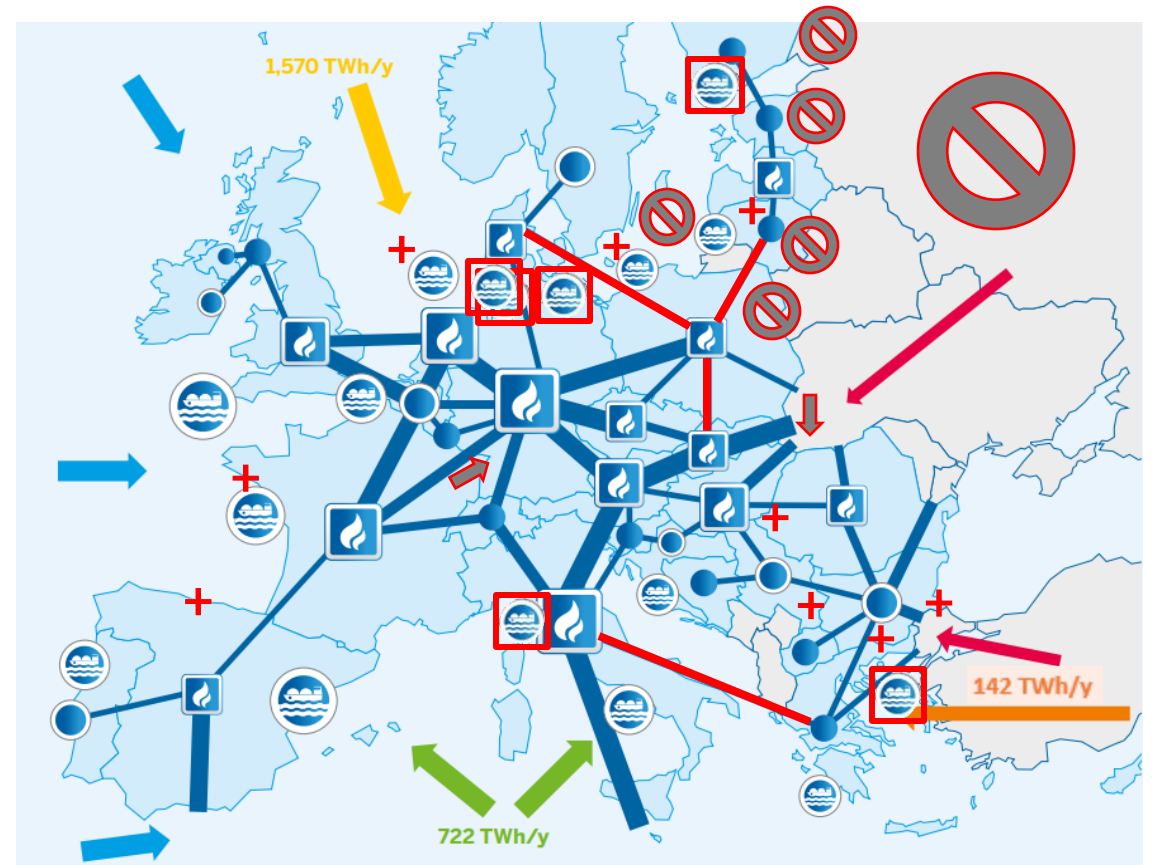
## EU Infrastructure beginning of 2022



LNG Regasification capacity in CEE&SEE:

approx. 18,6 bcm/y

## EU Infrastructure - Jul 2024



LNG Regasification capacity in CEE&SEE:

26.3 bcm/y



## Demand in the region

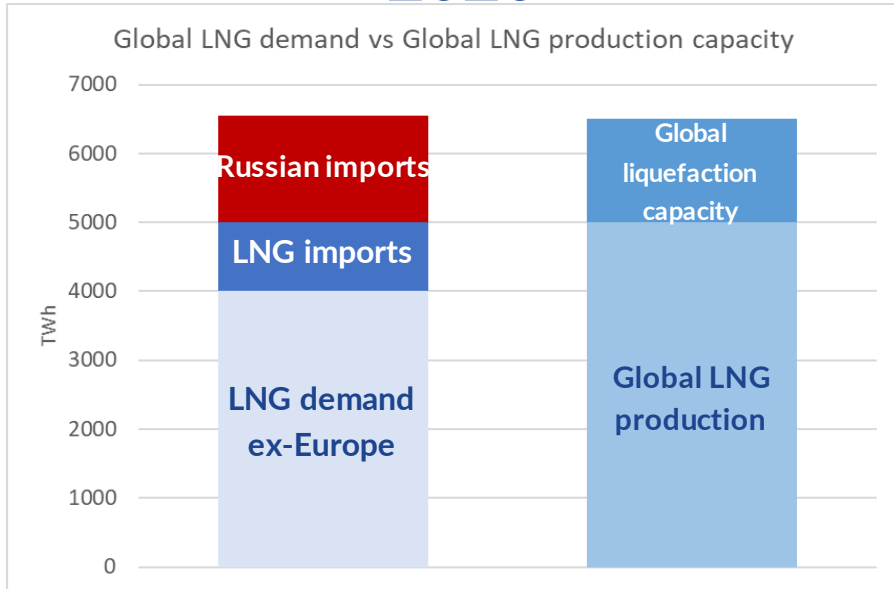
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Approx demand (2023 estimates):

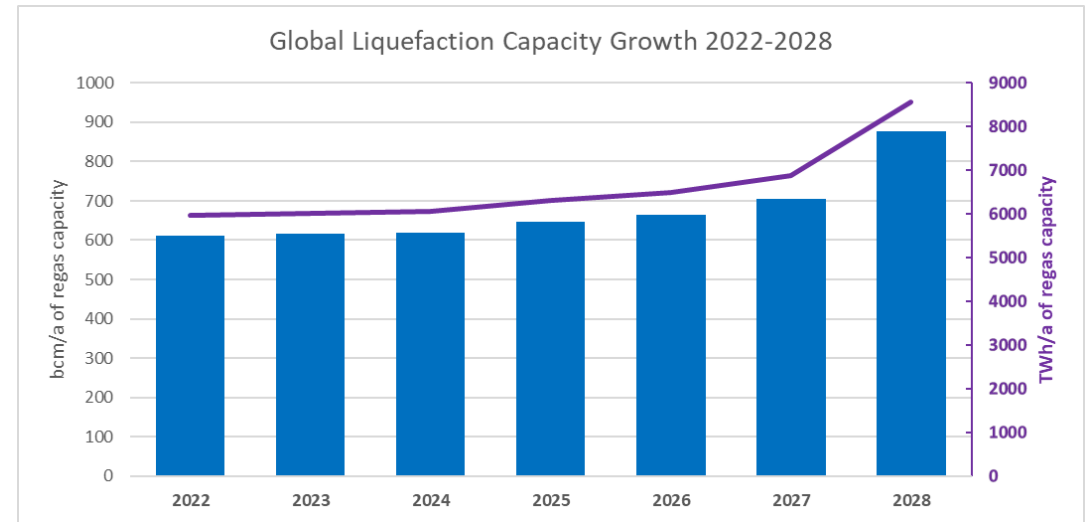
- Baltic States + FI: ~4 bcm/y
- PL, CZ, AT, SK, HU, HR, SI: ~47 bcm/y
- GR, BG, RO: ~18 bcm/y
- UA, MD: ~ 20 bcm/y
- MK, RS, BiH ~3 bcm/y

# Challenge? no challenge?

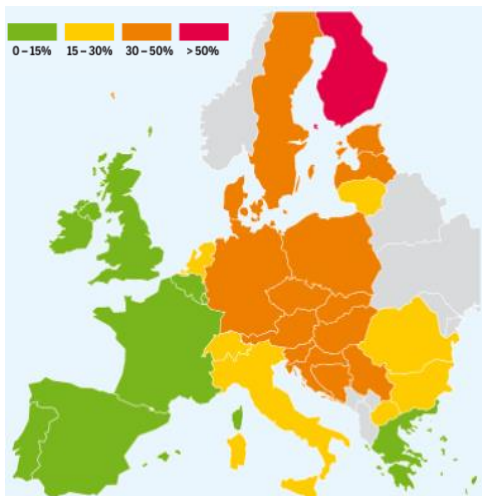
2020



source: International Group of Liquefied Natural Gas Importers



Source: Incorrys: Global Liquefaction Capacity Growth 2022-2028



Minimum dependence on Russian gas (source: TYNDP 2020)



Summer Outlook 2024, ENTSOG

## Perspective of the infrastructure

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**How change in the region can support UA, what role UA can play?**

- Ukrainian perspective, gas transmission system and underground storages



**Infrastructure seems to be in big part there, what is still missing?**

- How in practice existing infrastructure is used in reverted way



**Are regulations there?**

- Is regulatory framework ready to support and set adequate rules?



**Do traders have stable environment and certainty?**

- What would be needed? How to untap the potential?



**How market participants can benefit from more LNG in the region**

- Role of the aggregate EU in the region – potentials and perspectives



# Thank you for your attention

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