

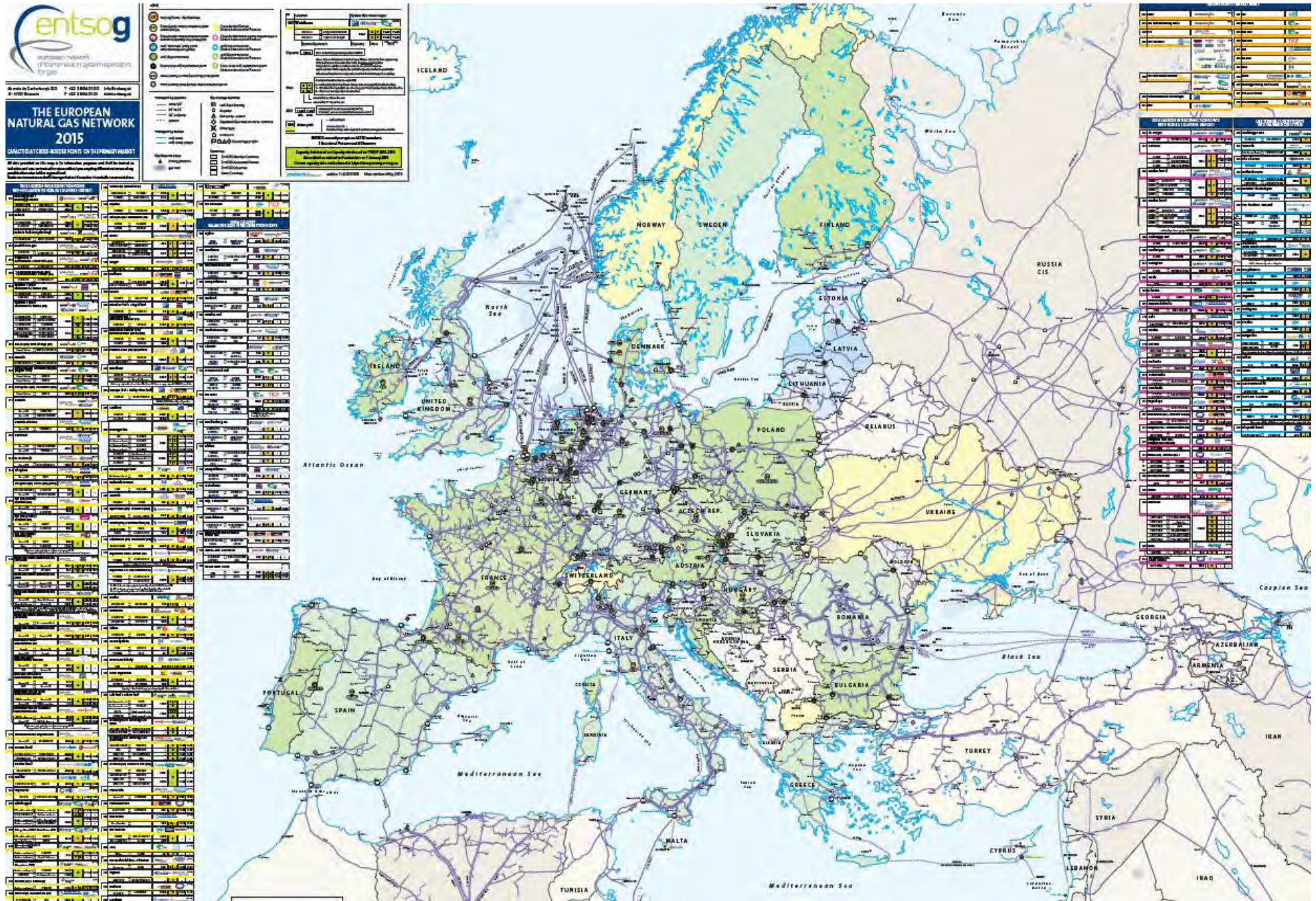


Balkan's Energy Future

Waiting for Gas Corridors

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European Natural Gas Network



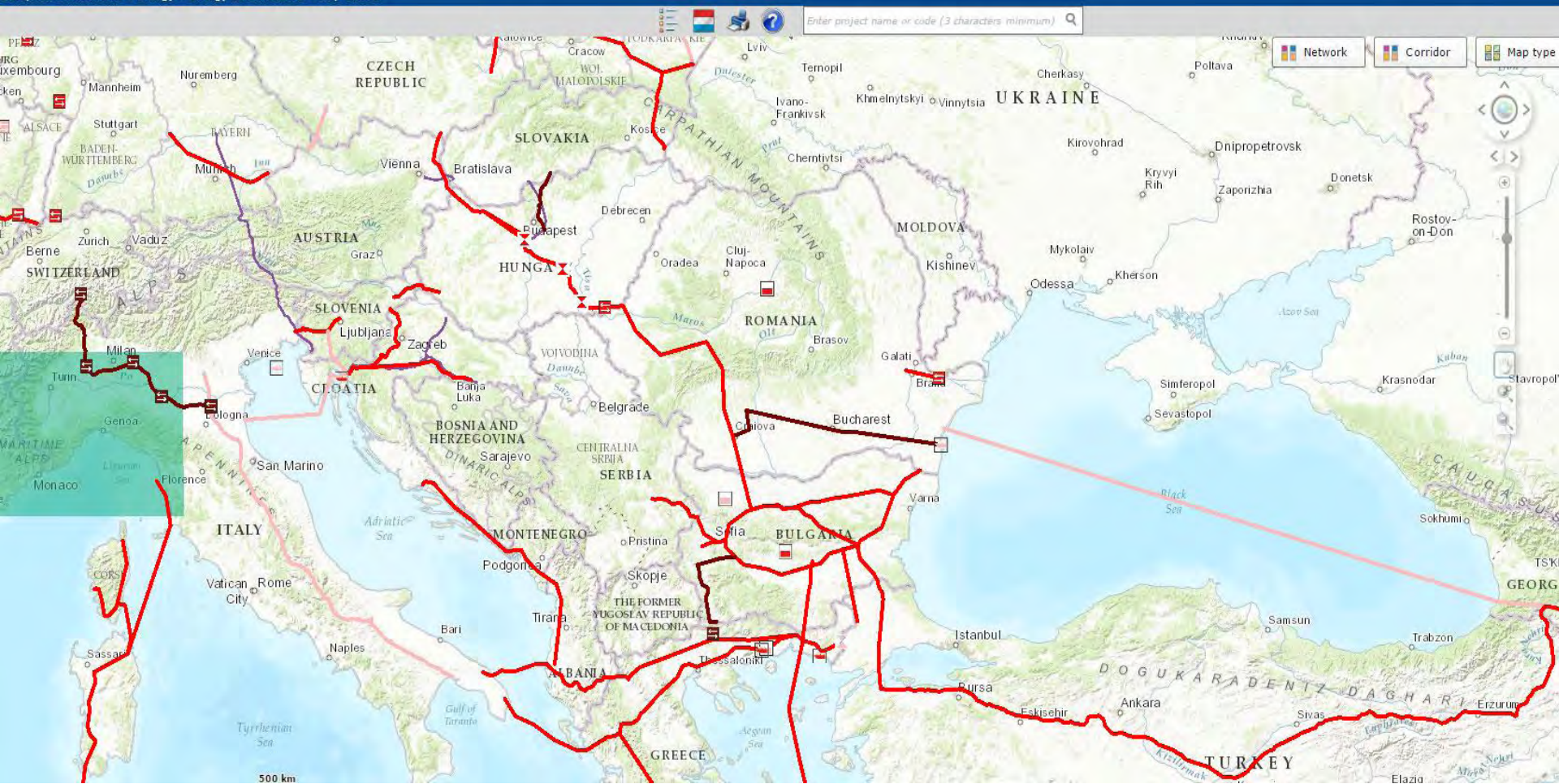
SEE Natural Gas Infrastructure – Energy Community Contracting Parties



EU Projects of Common Interest (PCI) in SEE Region



European Commission > Energy > Energy infrastructure > Map viewer



Central and South-Eastern European Gas Connectivity (CESEC) High Level Group: Indicative project-specific information as of March 2016 based on data from the project promoters and with reference to the list of all CESEC projects in the [Appendix to the CESEC Action Plan](#) of 10 July 2015.

Project	Phase	Techn. capacity	Expected commissioning	Completion of pre-construction stages					Construction start/end		Additional information
				Pre-feasibility	Feasibility	FEED	FID	Permitting	Start	End	
Trans-Adriatic Pipeline (TAP)		10 bcm/y	2020	2003	2006-2007	03/2013	12/2013	2016	05/2016	12/2019	Capacity can be expanded up to 20 bcm/y. Such expansion is subject to an economically and technically feasible outcome of a market test.

Project	Phase	Techn. capacity	Expected commissioning	Completion of pre-construction stages					Construction start/end		Additional information
				Pre-feasibility	Feasibility	FEED	FID	Permitting	Start	End	
Interconnector Greece – Bulgaria (IGB)		3 bcm/y	2018			03/2016	12/2015	11/2016	12/2016	3Q 2018	Possibility for future upgrade to 5 bcm/y by installation of compressor capacity

Project	Phase	Techn. capacity	Expected commissioning	Completion of pre-construction stages					Construction start/end		Additional information
				Pre-feasibility	Feasibility	FEED	FID	Permitting	Start	End	
Interconnector Bulgaria – Serbia (IBS)	Phase 1 (BG)	BG to RS: 1.0 (1.8) bcm/y	12/2018	02/2011	12/2012	03/2016	03/2016	08/2016	08/2016	12/2018	Phase 1 refers to a single pipe Nis – Dimitrovgrad of 108 km. BG/RS timelines to be harmonised in the MoU expected in 2Q2016. According to the joint BG/RS roadmap, the capacity (incl. reverse capacity) of the pipeline will be increased in Phase 2 (2020) and Phase 3 (2024).
	Phase 1 (RS)	RS to BG: 0.15 bcm/y	10/2019		12/2011	06/2017		09/2017	02/2018	10/2019	

Trans Balkan Pipeline – a EC priority in the Region ?



**Interconnection
Agreements**

Infrastructure Development

v.s.

Strategy and Actions



Source: Energy Community Secretariat
ENERGY COMMUNITY STRATEGY and PROJECTS OF ENERGY COMMUNITY INTEREST (PECI),
page 18 – 1 November 2013

DIRECTIVE 2003/55/EC OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

of 26 June 2003

concerning common rules for the internal market in natural gas and repealing Directive 98/30/EC

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF
THE EUROPEAN UNION,

Having regard to the Treaty establishing the European Community, and in particular Article 47(2), Article 55 and Article 95 thereof,

Having regard to the proposals from the Commission ⁽¹⁾,

Having regard to the Opinion of the European Economic and Social Committee ⁽²⁾,

Having consulted the Committee of the Regions,

Acting in accordance with the procedure laid down in Article 251 of the Treaty ⁽³⁾,

Whereas:

(1) Directive 98/30/EC of the European Parliament and of the Council of 22 June 1998 concerning common rules for the internal market in natural gas ⁽⁴⁾ has made significant contributions towards the creation of an internal market in natural gas.

(2) Experience in implementing this Directive shows the benefits that may result from the internal market in gas, in terms of efficiency, gas, price reductions, higher standards of service and increased competitiveness. However, significant shortcomings and possibilities for improving the functioning of the market remain, notably concrete provisions are needed to ensure a level playing field and to reduce the risks of market dominance and predatory behaviour, ensuring non-discriminatory transmission and distribution tariffs, through access to the network on the basis of tariffs published prior to their entry into force, and ensuring that the rights of small and vulnerable customers are protected.

(3) At its meeting in Lisbon on 23 and 24 March 2000, the European Council called for rapid work to be undertaken to complete the internal market in both electricity and gas sectors and to speed up liberalisation in these sectors with a view to achieving a fully operational internal market. The European Parliament, in its Resolution of 6 July 2000 on the Commission's second report on the state of liberalisation of energy markets, requested the Commission to adopt a detailed timetable for the achievement of accurately defined objectives with a view to gradually but completely liberalising the energy market.

(4) The freedoms which the Treaty guarantees European citizens — free movement of goods, freedom to provide services and freedom of establishment — are only possible in a fully open market, which enables all consumers freely to choose their suppliers and all suppliers freely to deliver to their customers.

(5) In view of the anticipated increase in dependency as regards natural gas consumption, consideration should be given to initiatives and measures to encourage reciprocal arrangements for access to third-country networks and market integration.

(6) The main obstacles in arriving at a fully operational and competitive internal market relate to, amongst other things, issues of access to the network, access to storage, tariffication issues, interoperability between systems and different degrees of market opening between Member States.

(7) For competition to function, network access must be non-discriminatory, transparent and fairly priced.

(8) In order to complete the internal gas market, non-discriminatory access to the network of the transmission and distribution system operators is of paramount importance. A transmission or distribution system operator may consist of one or more undertakings.

⁽¹⁾ OJ C 240 E, 28.8.2001, p. 60 and OJ C 227 E, 24.9.2002, p. 393.

⁽²⁾ OJ C 36, 8.2.2002, p. 10.

⁽³⁾ Opinion of the European Parliament of 13 March 2002 (OJ C 47 E, 27.2.2003, p. 367), Council Common Position of 3 February 2003

ANNEX 19

Ref: 10thMC/18/10/2012 - Annex 19/27.07.2012

Energy Strategy of the Energy Community

Page 61

SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the Energy Community Contracting Parties, as a region

Opportunities

Being at the cross roads between Central Europe, Southern Europe and the Middle East, the region's position also grants it an important geopolitical significance. With Ukraine joining the Energy Community, the most significant route for transport of Russian natural gas to Europe has been integrated into the internal market.



A recent World Bank study listed the numerous opportunities to be gained from the wholesale market opening in the region.²² Above all, higher electricity and gas prices are expected to attract new investments, thus boosting the overall security of supply. The wholesale market opening would help pave the way for competition, enabling an easier market entry for new suppliers. A common, well interconnected market could better attract new gas suppliers to the region. Thanks to competition, consumers would benefit from broader product and service assortment.

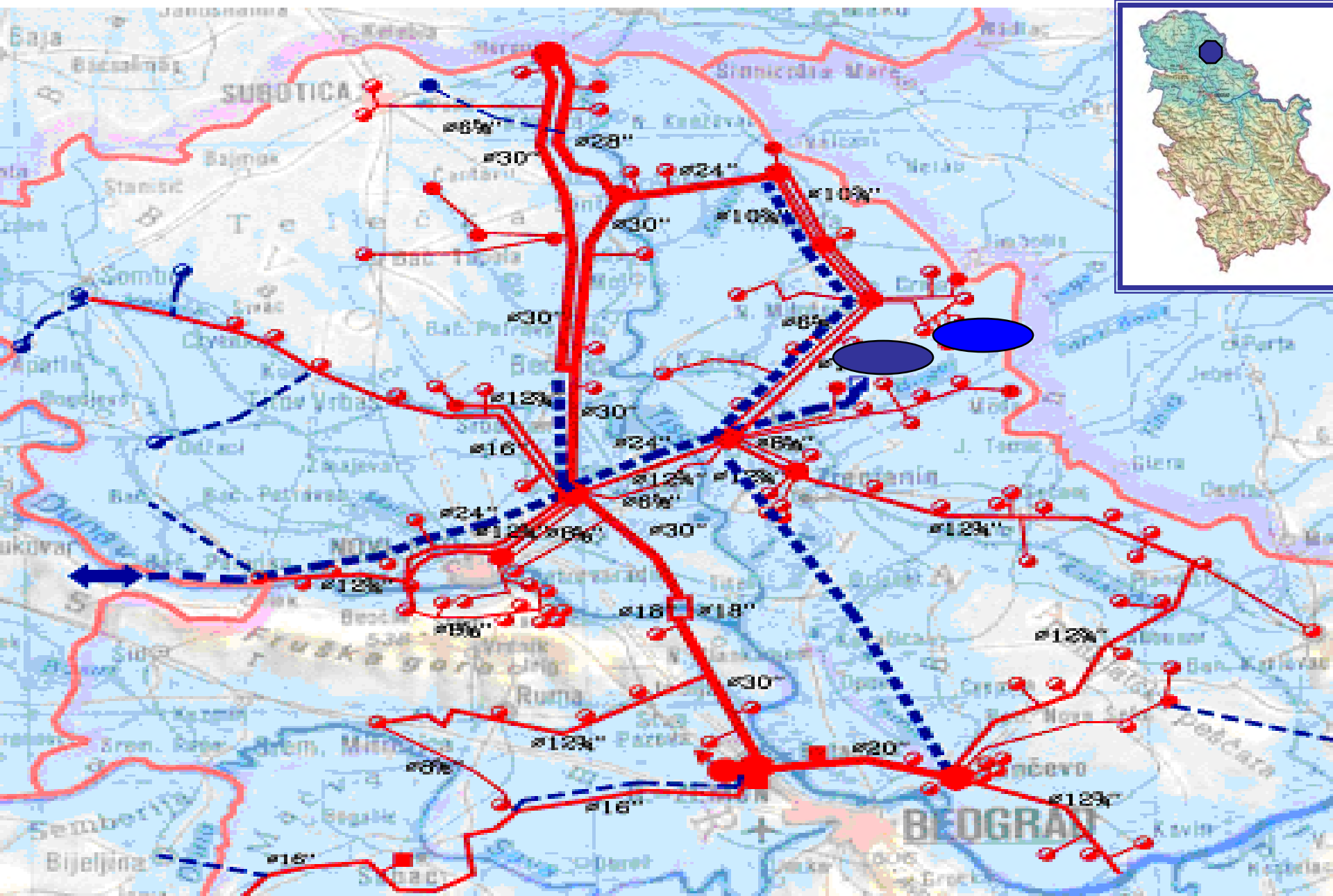
New investments should be directed predominantly towards new renewable energy generation and natural gas fired power plants, whose potential both in term of enhanced security of supply and contribution to reduced emission remains untapped as of today in the region. The latter is particular important also in light of the role of natural gas can play as back up fuel in a market with high penetration of interruptible energy source as the ambitions on renewables seem to imply. In general investment should be directed towards any project that would help meeting the requirements of the LCP Directive.



**Securing Natural Gas
Supply**

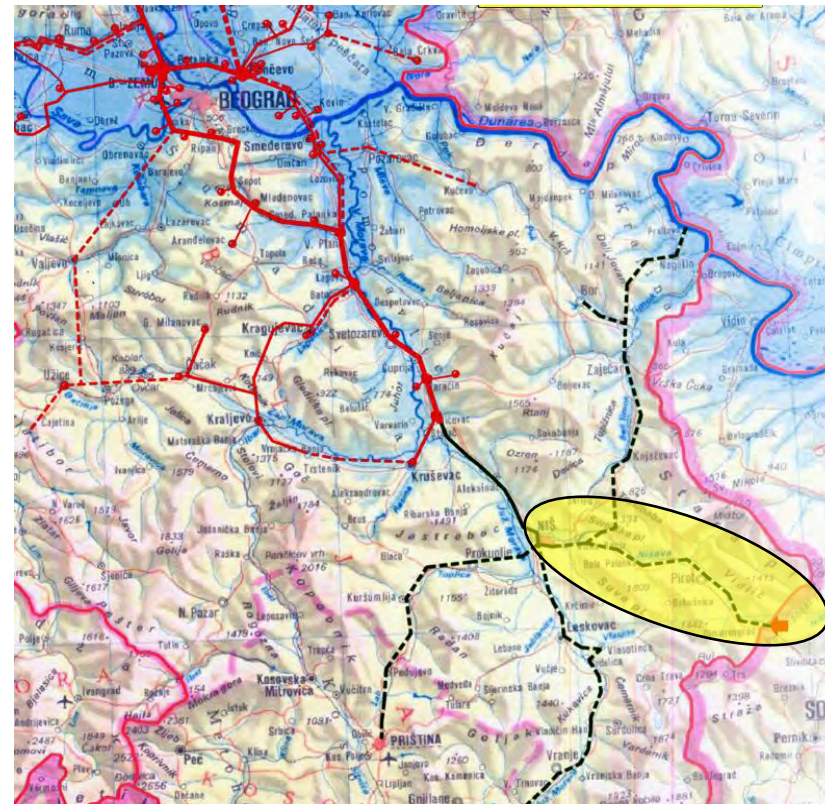


Underground Gas Storages Banatski Dvor and Itebej



Interconnector Bulgaria Serbia (IBS)

- Interconnection route: *Niš - Dimitrovgrad (Serbia) – Sofia (Bulgaria)*
- *Technical parameters (serbian section) :*
 - Pipeline Capacity 1.8 bcm/y
 - Pipeline length 108 km
 - Pipeline Diameter 700 mm
 - Input Pressure 55 bar
- Investment cost (*Serbian part*): 86m €
- *Project Status*: FS available
Technical Design & Spatial Plan in progress
- Financial structure: IPA grant support expected
- Commissioning year: 2020



*Thank you for
your attention.*