

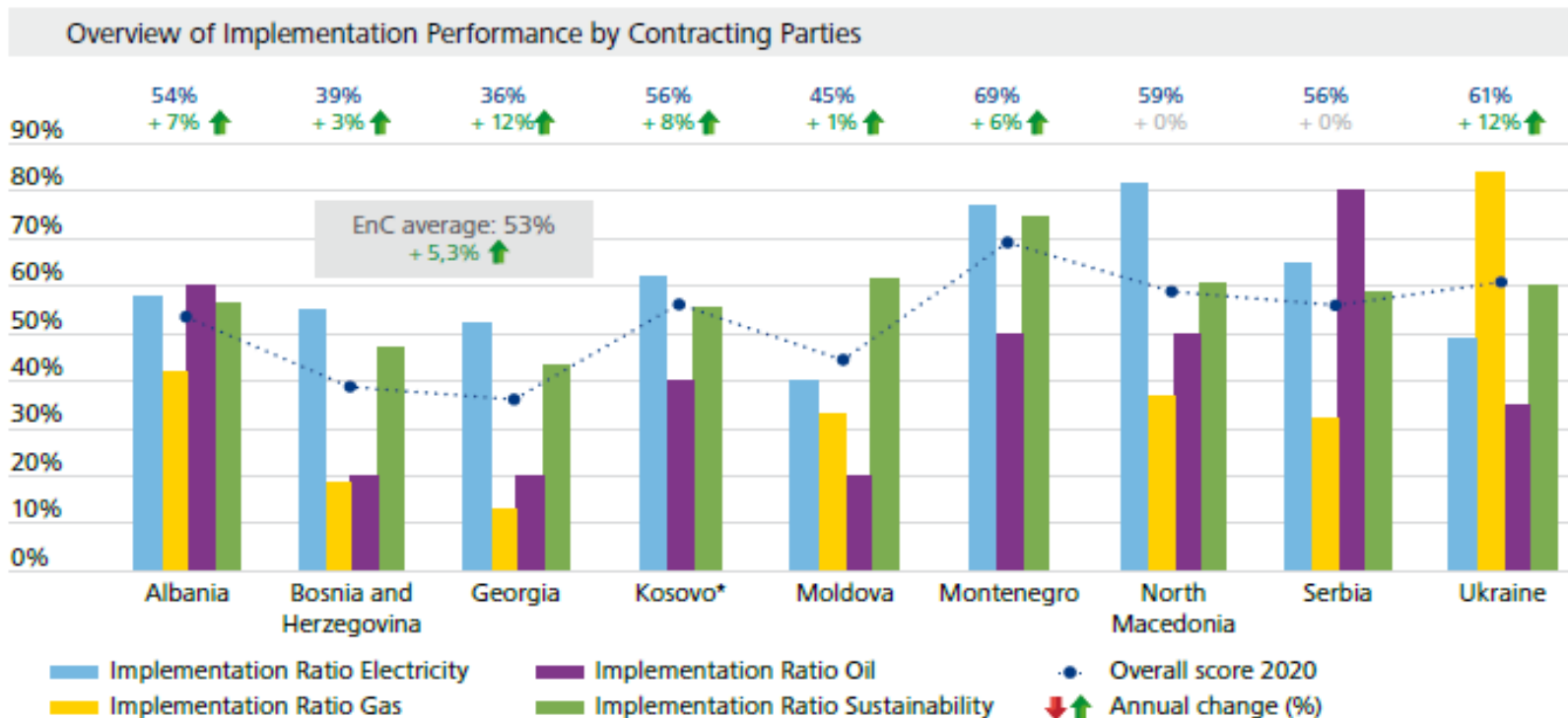
35th European Gas Regulatory Forum
29-30 April 2021, virtual event

***Improving market functioning in the Energy
Community***

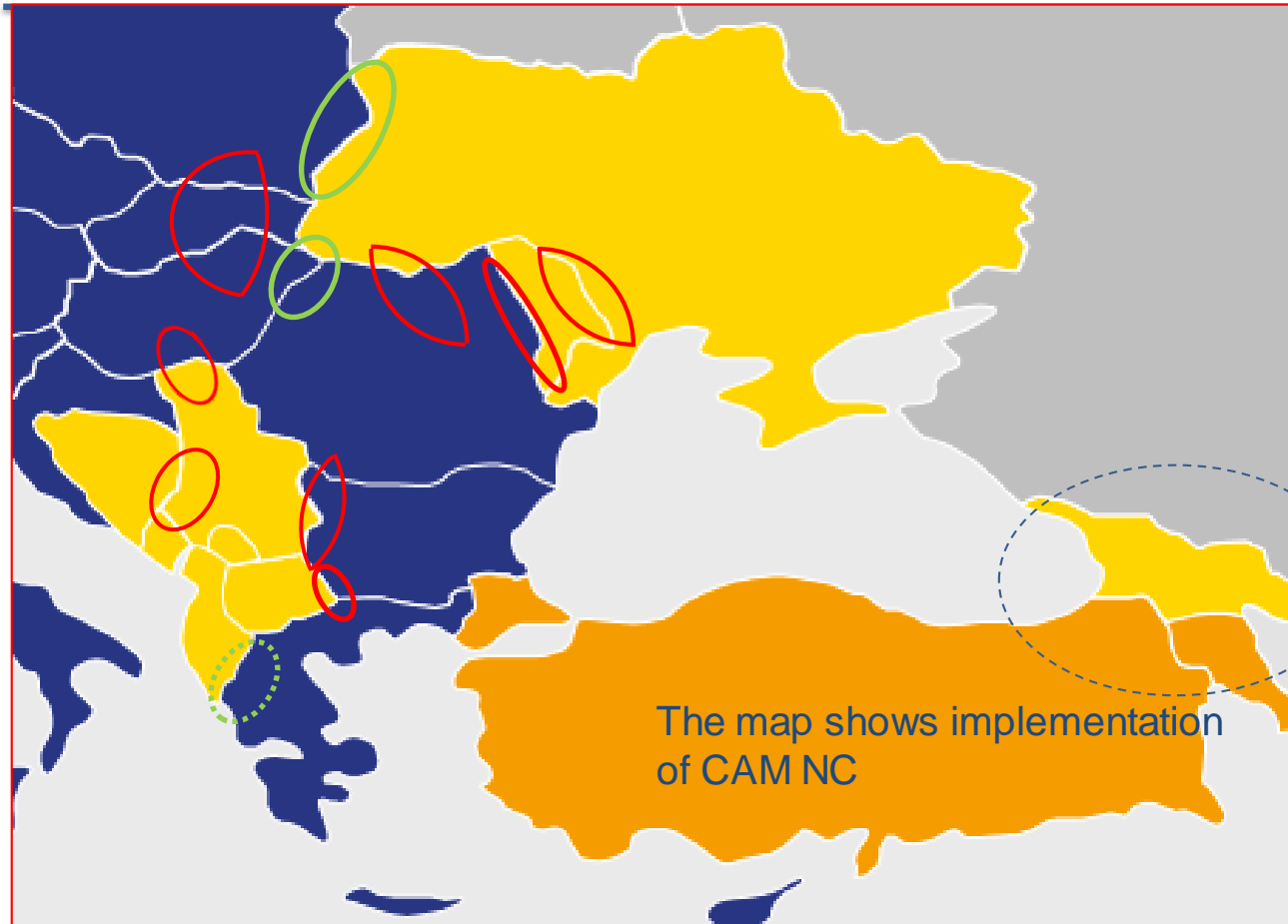
30 April 2021

Janez Kopač, Director, Energy Community Secretariat

Implementation of the acquis - indicators snapshot



Source: ECS

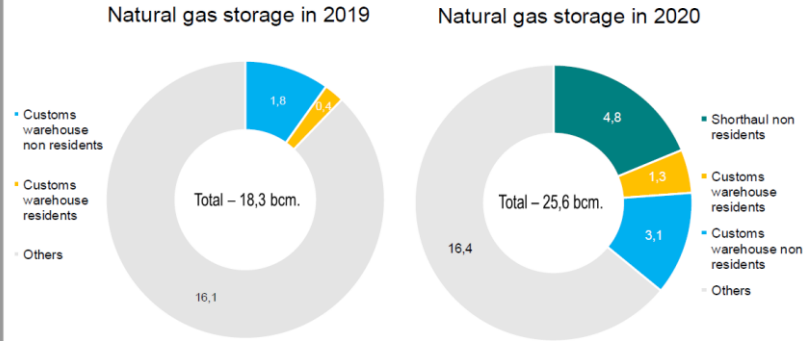


Mandatory: only for IPs between two Contracting Parties (for UA-MD and RS-BiH at 6 IPs)

Voluntary - EU MS – EnC CP IPs
PL, HU, RO NRA – decisions to implement NCs with CPs

INT NC:

14 out of 20 IPs covered by ICAs agreements (missing ICAs at: BG-MK border, MD-RO border and 4 points at UA-RO border)



Ukraine very integrated into EU gas markets

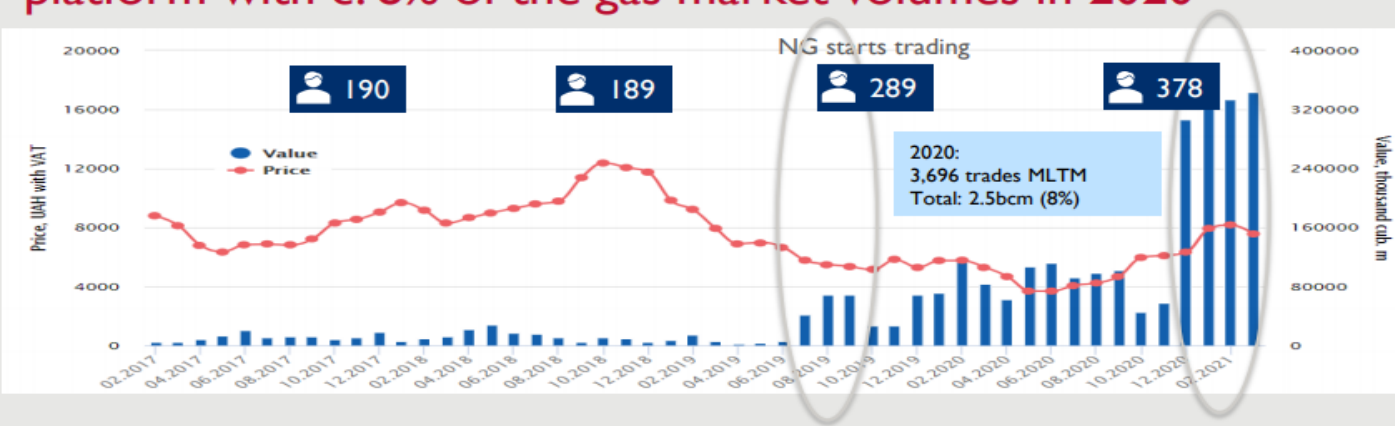
Current challenges:

-temporary energy units

-gas release program (Naftogaz's market power as distortion)

-capacity use and offering on IPs – public consultation ECS-ACER

Ukrainian Energy Exchange is the “biggest” independent trading platform with c. 8% of the gas market volumes in 2020

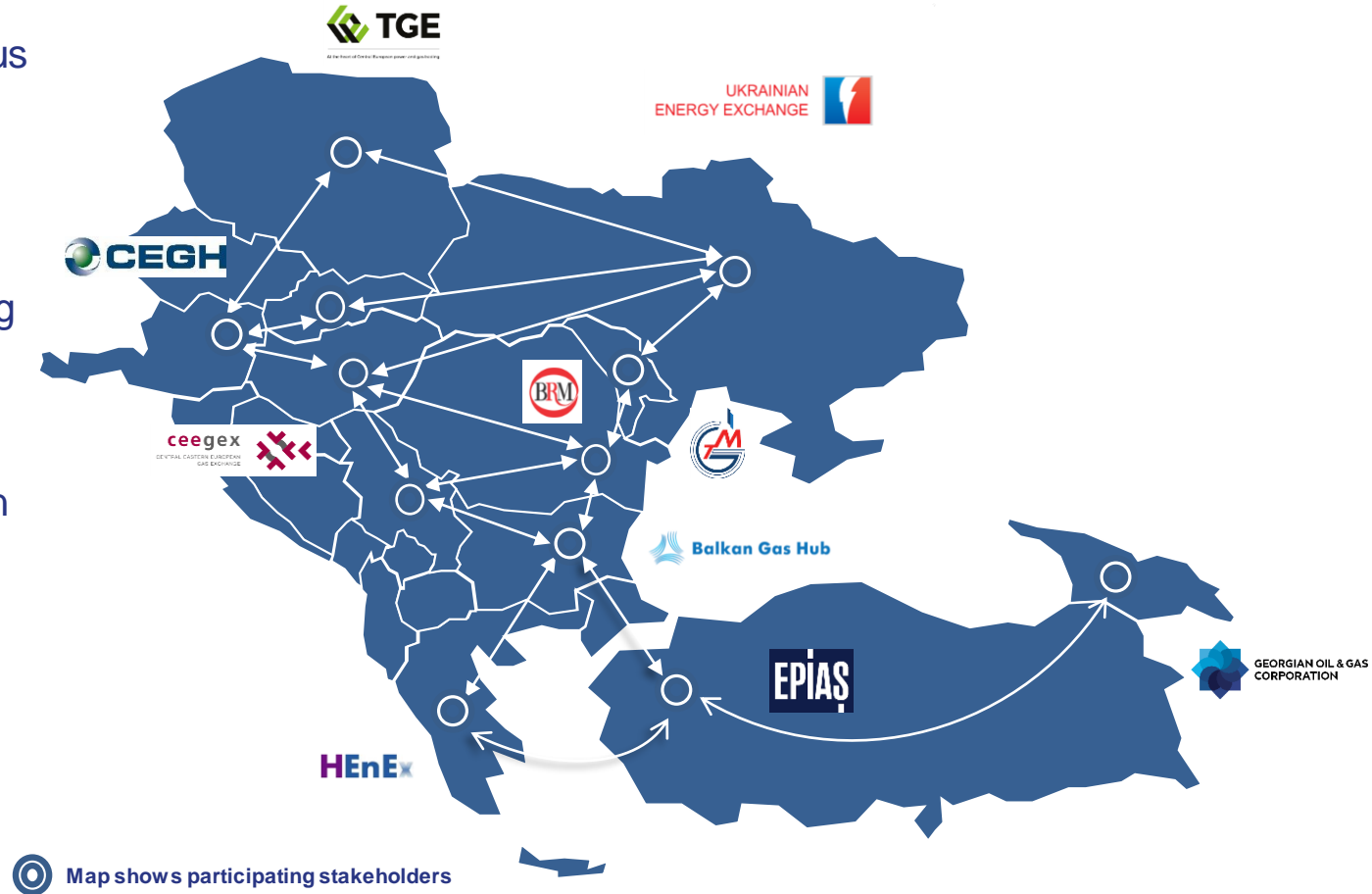


UEEX supported by the Energy Community Secretariat and EBRD

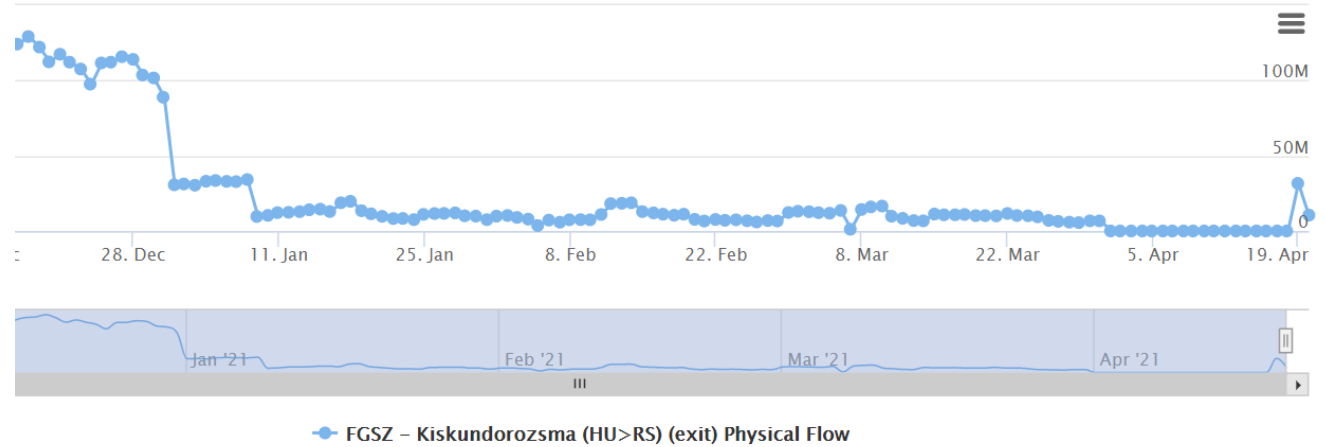
- Initiative for a central gas exchange (summer 2019)
- MoU with the Ministry (July 2020)
- MoU with the TSO (October 2020)

South East and East European Gas (SEEGAS) Platform

- Coordination platform with focus on Gas exchanges and market integration
- SEEGAS Trans-regional Memorandum of Understanding under development
- Specialized Stakeholder meeting on Clearing planned in mid of June
- **Energy Community Secretariat as coordinator**



Case study - Serbia



Lack of 3 Serbian TSOs unbundling

With Gastrans (Turkish Stream) start of the operation, the Horgos IP remains idle

6/15 TSOs

93% of total transmission network covered by the report

≈ **150 Bcm** of natural gas transported in 2019

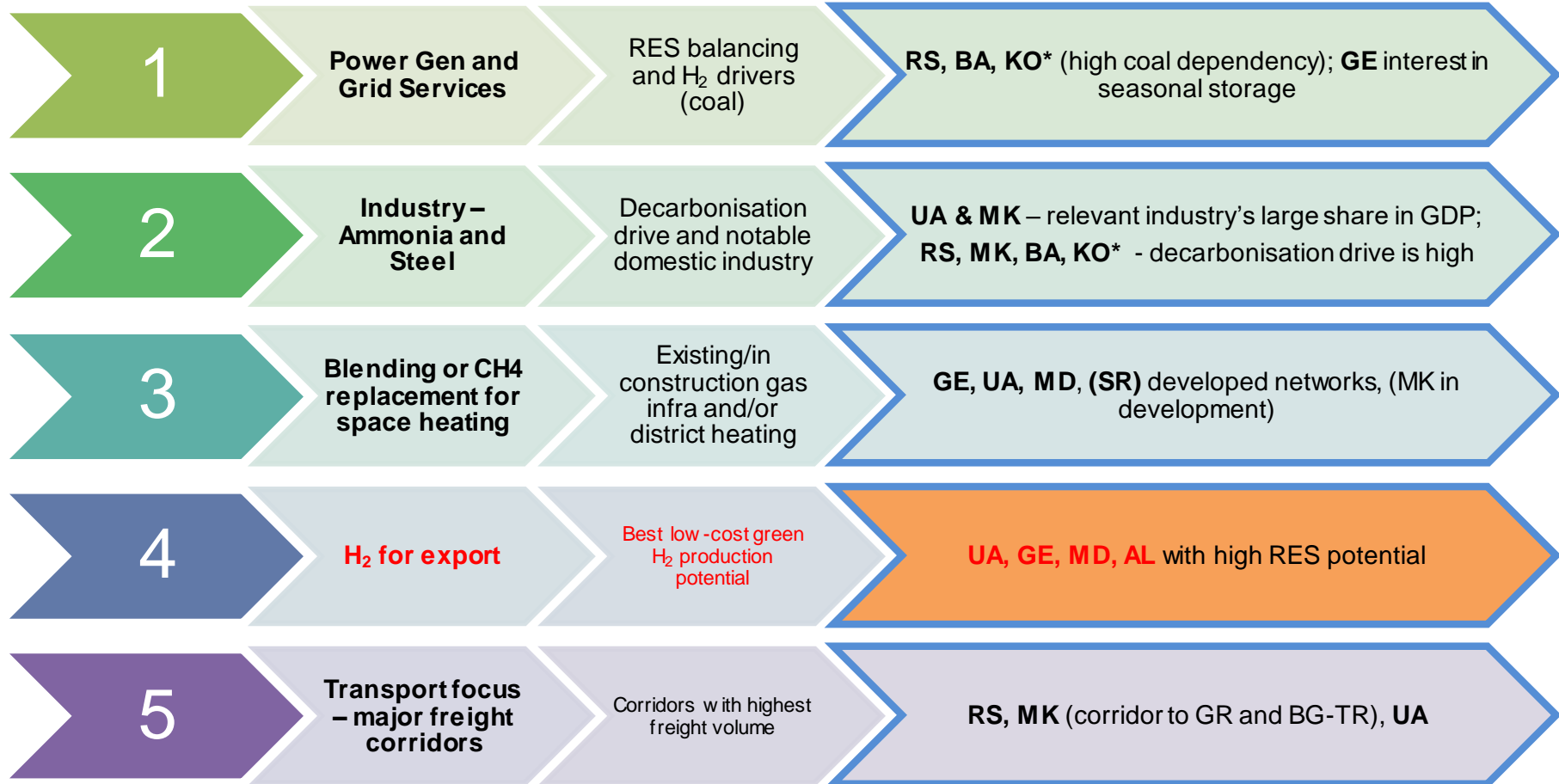
33/136 DSOs

71% of total distribution network covered by the report



≈ **200 kt CH₄** emitted in 2019

EnC Hydrogen Study preliminary findings



PECI and PMI Gas projects 2020, along with the Flagship projects



PECI
PMI
European Commission's
Flagship priority projects:

