

SYNERGY OF DEVELOPMENT OF NEW NATURAL GAS SUPPLY PROJECTS AND SYSTEMS IN THE SOUTHEAST EUROPE

3rd South East Europe Energy Dialogue
Thessaloniki, June 18th – 19th, 2009



GAS TRANSMISSION SYSTEM OPERATOR

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GAS STORAGE SYSTEM OPERATOR



LEGEND

- GAS NETWORK 50 BAR
- GAS NETWORK 75 BAR
- UGS

Plan of Development, Construction and modernisation of the Gas Transmission System in the Republic of Croatia from 2002 to 2011
(Plinacro, 2001-2002)



Approval of the Plan of Development, Construction and modernisation of the Gas Transmission System in the Republic of Croatia for the first five-year period 2002-2006
(Ministry of Economy, 30th August 2002)



Major step forward for the gas sector and the entire energy sector of the Republic of Croatia

AIMS Of the Plan of Development, Construction and modernisation of the Gas Transmission System in the Republic of Croatia from 2002 to 2011

- Reliable and secure natural gas supply
- Supply of natural gas to the largest part of the Republic of Croatia
- Long-term increase of natural gas consumption
- Diversification of natural gas supply
- Connection of the Croatian Gas Transmission system with the Gas Transmission systems of the neighbouring countries

PLANNING AND SHAPING OF THE NEW HIGH-PRESSURE GAS TRANSMISSION SYSTEM
IN THE REPUBLIC OF CROATIA



CONSIDERED DEVELOPMENT PLANS AND NEEDS OF THE REGIONAL GAS SYSTEMS



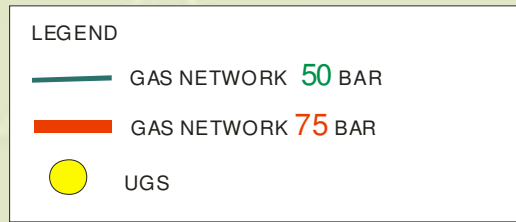
CONSIDERED PLANNED AND POTENTIAL GAS PROJECTS IN THE REGION



SYNERGY ACTION



EFFICIENT PROJECTS



EXCEPTIONAL DYNAMICS OF THE ACTIVITIES ON THE GAS AS WELL
AS ENTIRE ENERGY SCENE IN THE REPUBLIC OF CROATIA AND
WIDER REGION

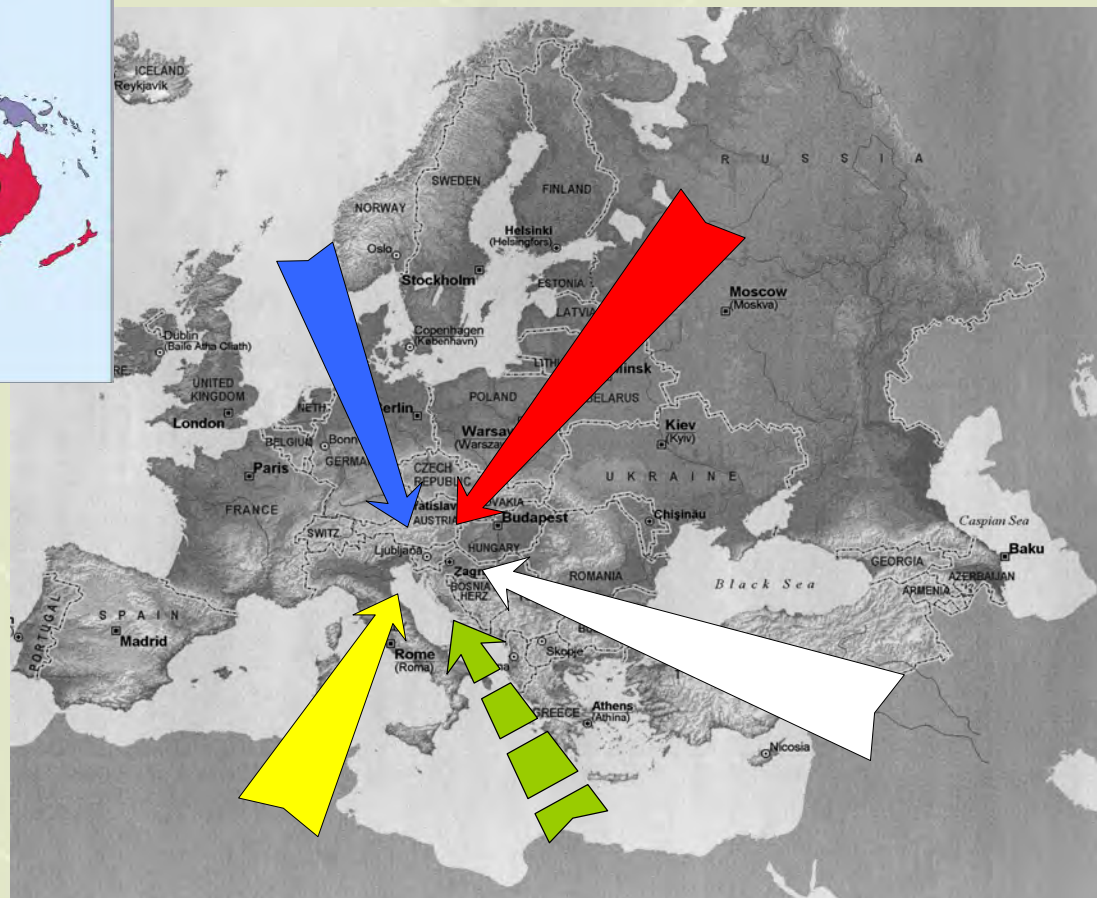
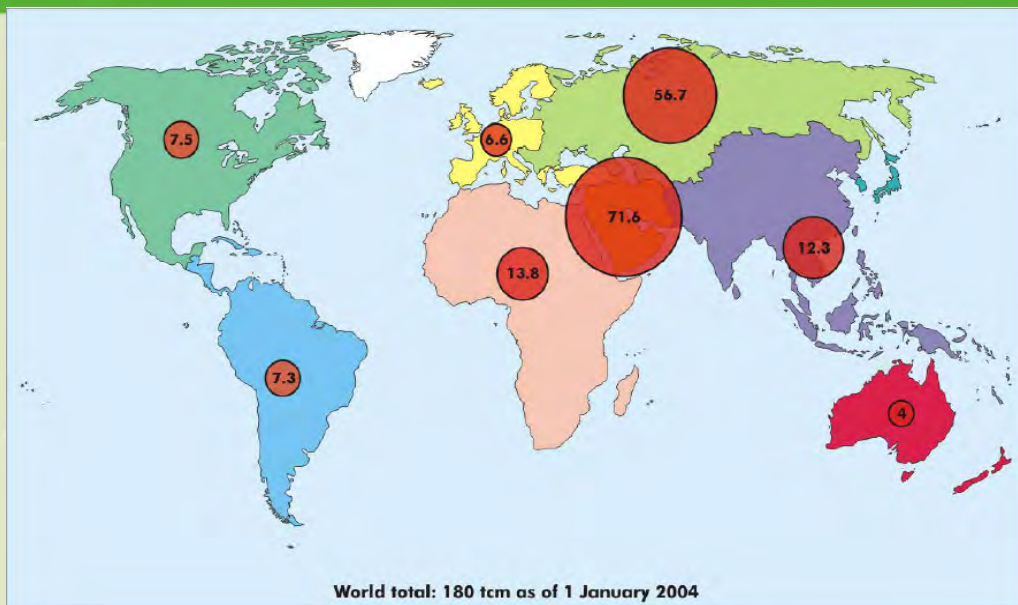


OBSERVATION OF DEVELOPMENT PLANS AND PROJECTS OF THE
NEIGHBOURING COUNTRIES AS WELL AS WIDER REGION



DEVELOPMENT AND CONSTRUCTION OF THE GAS SYSTEM, AS
EFFICIENT AS POSSIBLE

POSITION OF CROATIA IN RELATION TO THE EXSISTING, AS WELL AS NEW SUPPLY ROUTES





INTERACTION OF THE GAS TRANSMISSION SYSTEMS OF NEIGHBOURING COUNTRIES AND THE PROJECTS IN THE REGION



SPATIAL CLOSENESS
DIRECTIONALITY TOWARDS THE SAME MARKETS
OVERLAPPING OF TRANSMISSION-TRANSIT ROUTES



SYNERGY OF GAS TRANSMISSION SYSTEMS





SYNERGY OF GAS TRANSMISSION SYSTEMS

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NEW SUPPLY ROUTES

(Nabucco, South Stream, TAP + IAP...)

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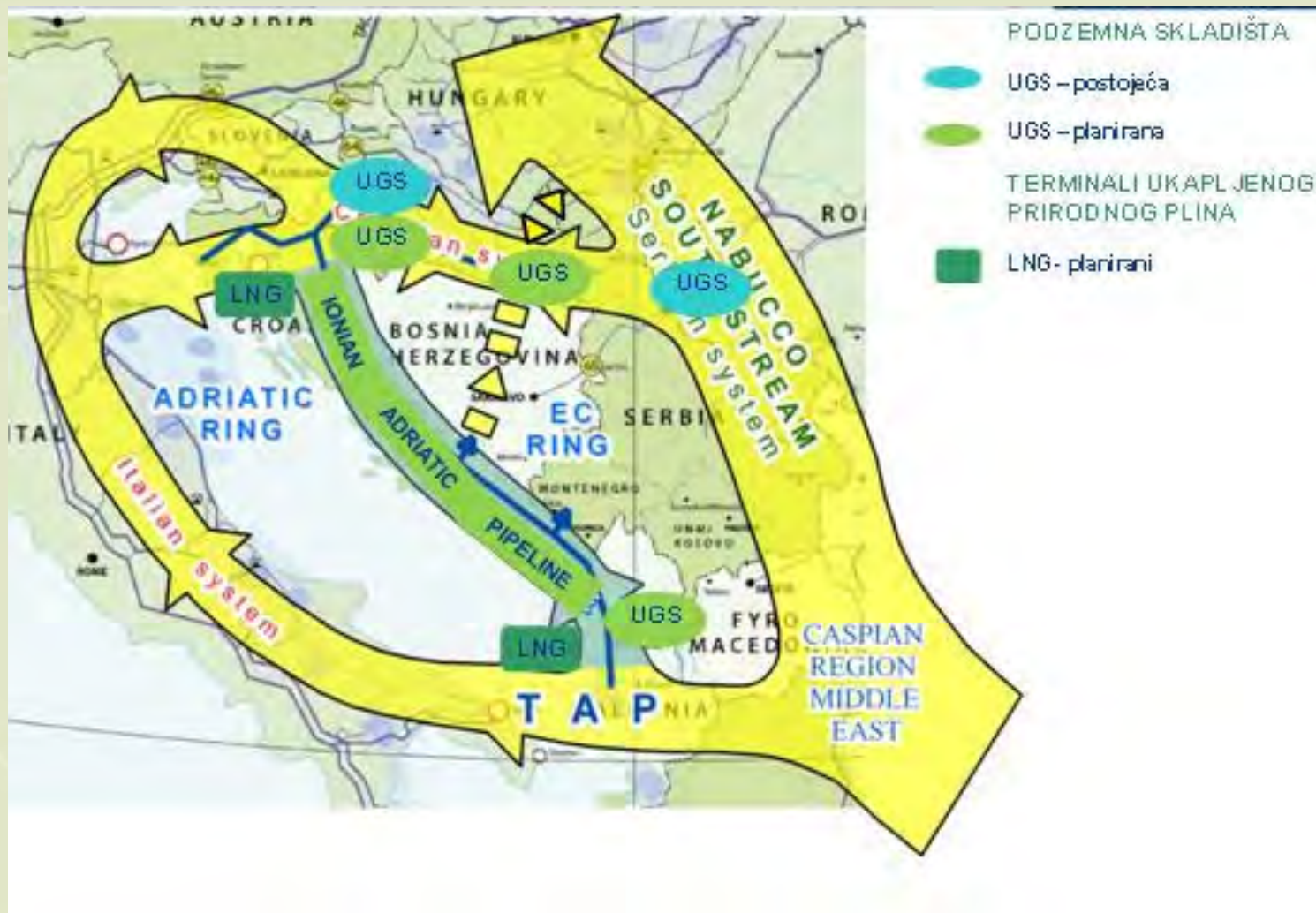
LNG TERMINAL

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UNDERGROUND GAS STORAGES

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SYNERGY OF THE ENTIRE GAS SYSTEM OF WIDER
REGION



CROATIAN GAS TRANSMISSION SYSTEM



LINE OF ACTION

THROUGH THE SYNERGY OF THE CROATIAN GAS TRANSMISSION SYSTEM WITH OTHER PARTS OF THE GAS SYSTEM AND GAS SYSTEMS AND PROJECTS IN THE REGION:

- TO INCREASE EFFICIENCY OF THE GAS TRANSMISSION SYSTEM
- TO INCREASE FLEXIBILITY AND RELIABILITY AND EFFICIENCY OF THE ENTIRE GAS SUPPLY
- ACCHIEVE POTENTIALS FOR THE BUSINESS STEP FORWARD IN THE REGION IN ALL SEGMENTS OF NATURAL GAS ACTIVITY



THESE ARE NOT ACHIEVEMENTS OF ONLY CROATIAN GAS SYSTEM BUT OF ALL SYSTEMS IN THE REGION AS WELL



SYNERGY OF REGIONAL APPROACH

INVESTMENT PLAN

PLAN OF DEVELOPMENT, CONSTRUCTION AND MODERNISATION OF THE
GAS TRANSMISSION SYSTEM IN THE REPUBLIC OF CROATIA FROM
2002 - 2011

2002 – 2006

220 mil EUR

2007 – 2011

450 mil EUR

LNG
+ IAP
STORAGES

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