

DEVELOPMENT OF THE CROATIAN GAS SYSTEM – INCORPORATION IN THE EUROPEAN FLOWS AND GAS MARKET

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**ENERGY SECURITY AND GAS SUPPLY IN SE EUROPE
12 March 2015, Vienna**

PLINACRO – Croatian Gas TSO

- **With a licence by NRA for the period of 15 years (at the moment it is in the certification procedure in compliance with the new Gas Market Act)**
- **A 100% state-owned company**
- **In charge of development, modernisation, construction and maintenance of the Croatian gas transmission system**

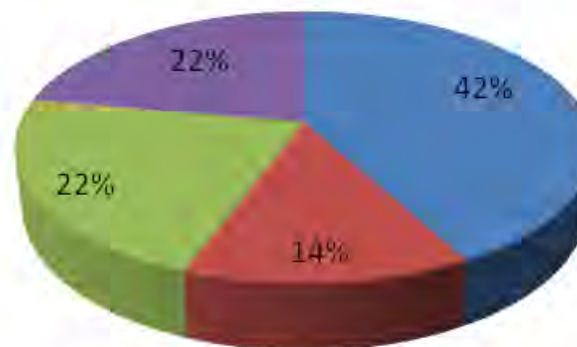
PSP – Operator of the UGS

- **Since 2009 a member of the group (100%-owned by Plinacro)**

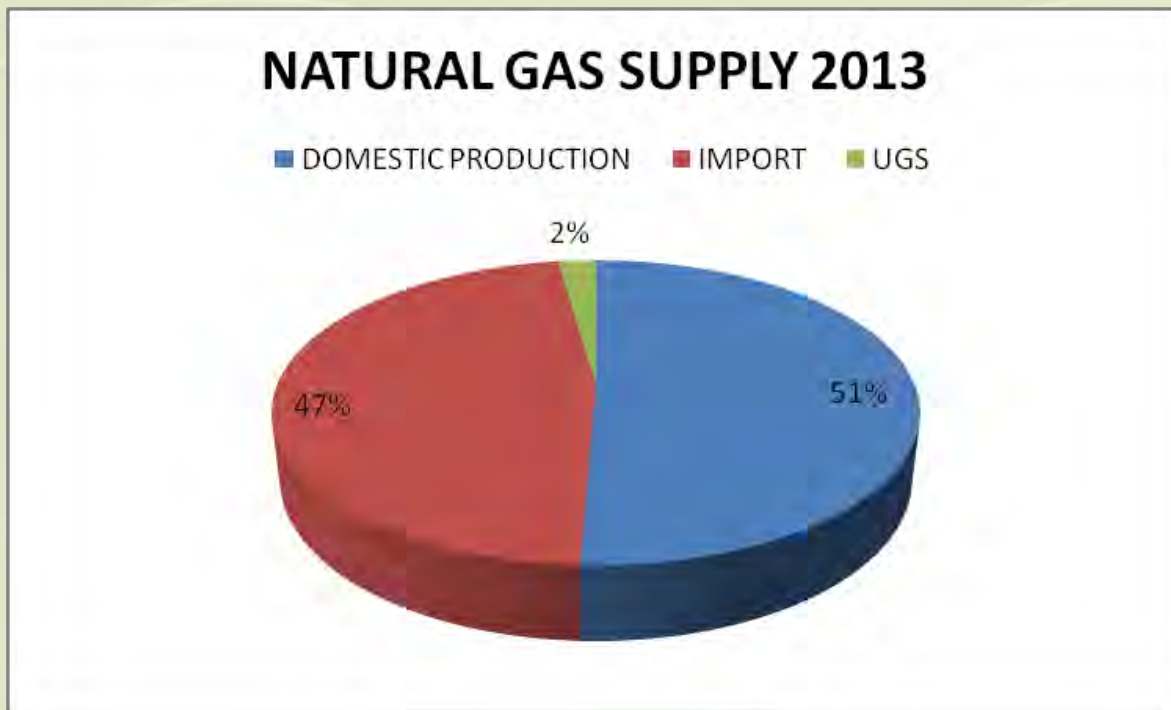
NATURAL GAS CONSUMPTION 2013	TWh
Distribution companies	10,91
Direct industrial consumers	3,51
Transformation	5,73
Petrochemistry	5,76
UKUPNO	25,91

NATURAL GAS CONSUMPTION 2013

- Distribution companies
- Direct industrial consumers
- Transformation
- Petrochemistry



NATURAL GAS SUPPLY 2013	TWh
DOMESTIC PRODUCTION	13,12
IMPORT	12,2
UGS	0,59
MARKET TOTAL	25,91





U Zagrebu, travanj 2014.
Izradila: Iva Juretić, prof. geog.

•HIGHLY DEVELOPED NATIONAL GAS TRANSMISSION SYSTEM

•SOLID CONNECTION WITH NEIGHBORING COUNTRIES

- Hungary - 6,5 bcm/y
- Slovenia - 1,8 bcm/y

•DOMESTIC PRODUCTION - 1,4 bcm/y

•UGS – 0,6 bcm



SECURITY OF SUPPLY

$$N - 1 = 0.93 \text{ ?}$$

- Better connection with gas transmission systems of the neighboring countries – interconnection
- New supply projects
- New UGS
- Increase domestic production



Interconnections:

- Interconnections Croatia/BiH
- Interconnections Croatia/Slovenia
- Interconnection Croatia/Serbia
- Interconnection Croatia/Italy

Regional projects:

- Ionian-Adriatic Pipeline (IAP)
- LNG Project
- South Stream
- North – South Gas Corridor



LNG Croatia:

Founded in 2010 - Plinacro 50%
(leaving the project), HEP 50%

Capacity: 4-6 bcm/y

Request for financing from WBIF for
CS, FS and CD; approved EUR 1
million; **Study – completed**

**Open season (non-bidding) – in
progress**

FID- end of 2016



Connection of gas transmission system of Lika and Dalmatia with TAP Project (Trans – Adriatic-Pipeline)

MP Split (CRO) – Fieri (ALB) DN800 / 85-75 bar, L= 511 km

Supply with natural gas - Albania, Montenegro, Bosnia and Herzegovina and Croatia

Max capacity: 5 bcm/y

Possibility of transit of natural gas to Central and Western Europe

Possibility of reverse flow

September 2007- Albania, Montenegro and Croatia signed **Ministerial Declaration**.
December 2008 - Bosnia and Herzegovina signed **Ministerial Declaration**.

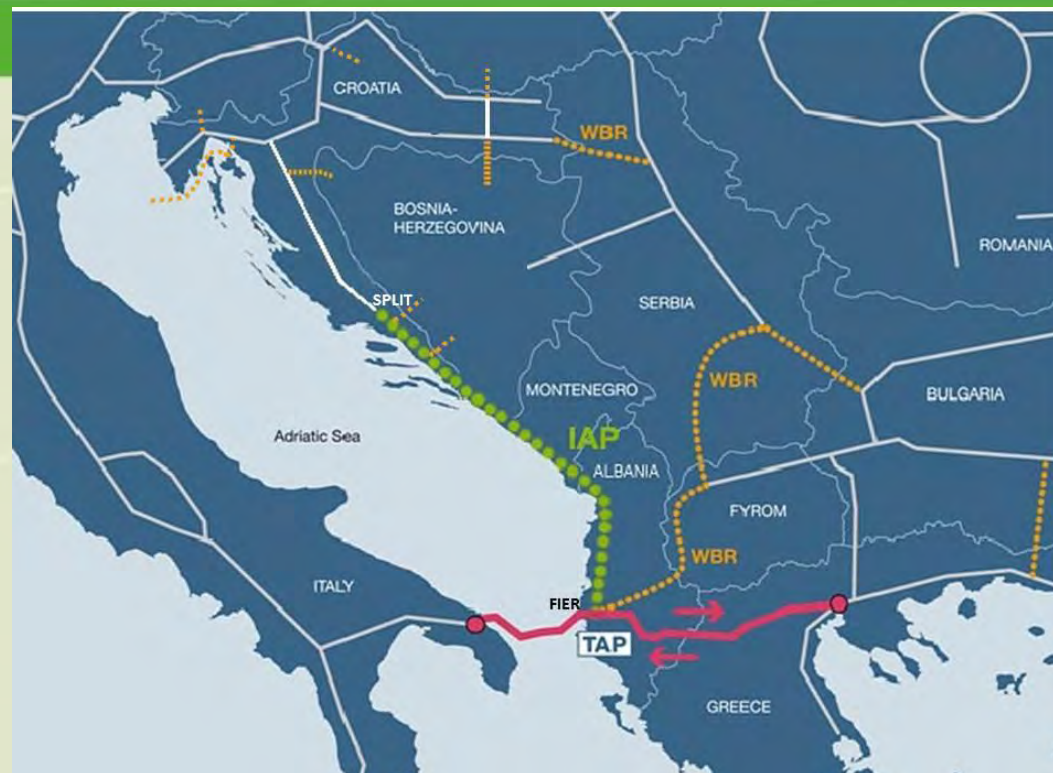
EGL and Plinacro signed **MOU**

June 2010 – Interstate Committee established, led by Croatia

February 2011 – Plinacro and TAP signed **MORIS**

March 2013 – SOCAR/Plinacro signed MOUC

Request for financing from **WBIF** for **comprehensive feasibility study** for the entire IAP led by Croatia i.e. Plinacro; granted EUR 3,5 million – **STUDY COMPLETED**

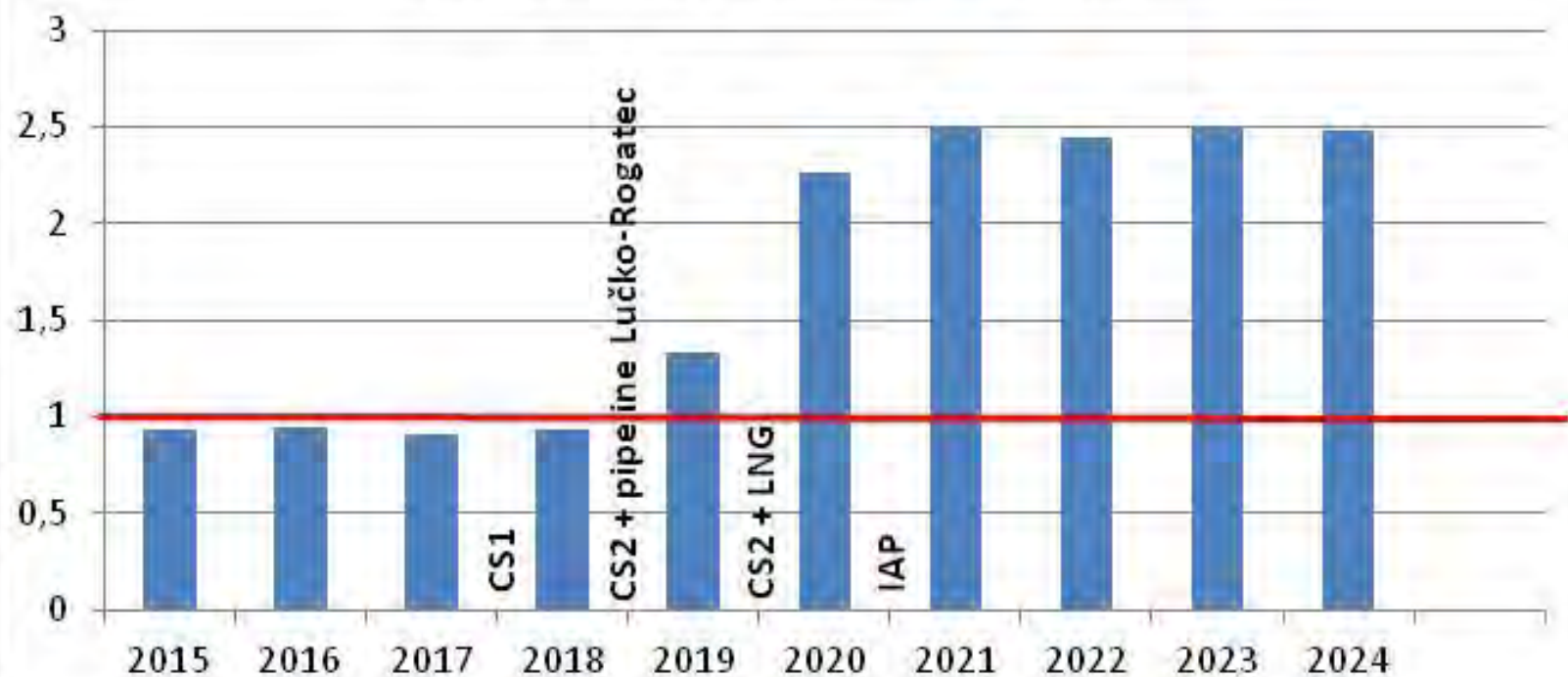


Source IAP – Feasibility Study

28 June 2013 - Shah Deniz Consortium took decision on the selection of the TRANS ADRIATIC PIPELINE (TAP) for the transmission of gas from Shah Deniz II field

➤Decision – additional impetus and encouragement for the Ionian Adriatic Pipeline

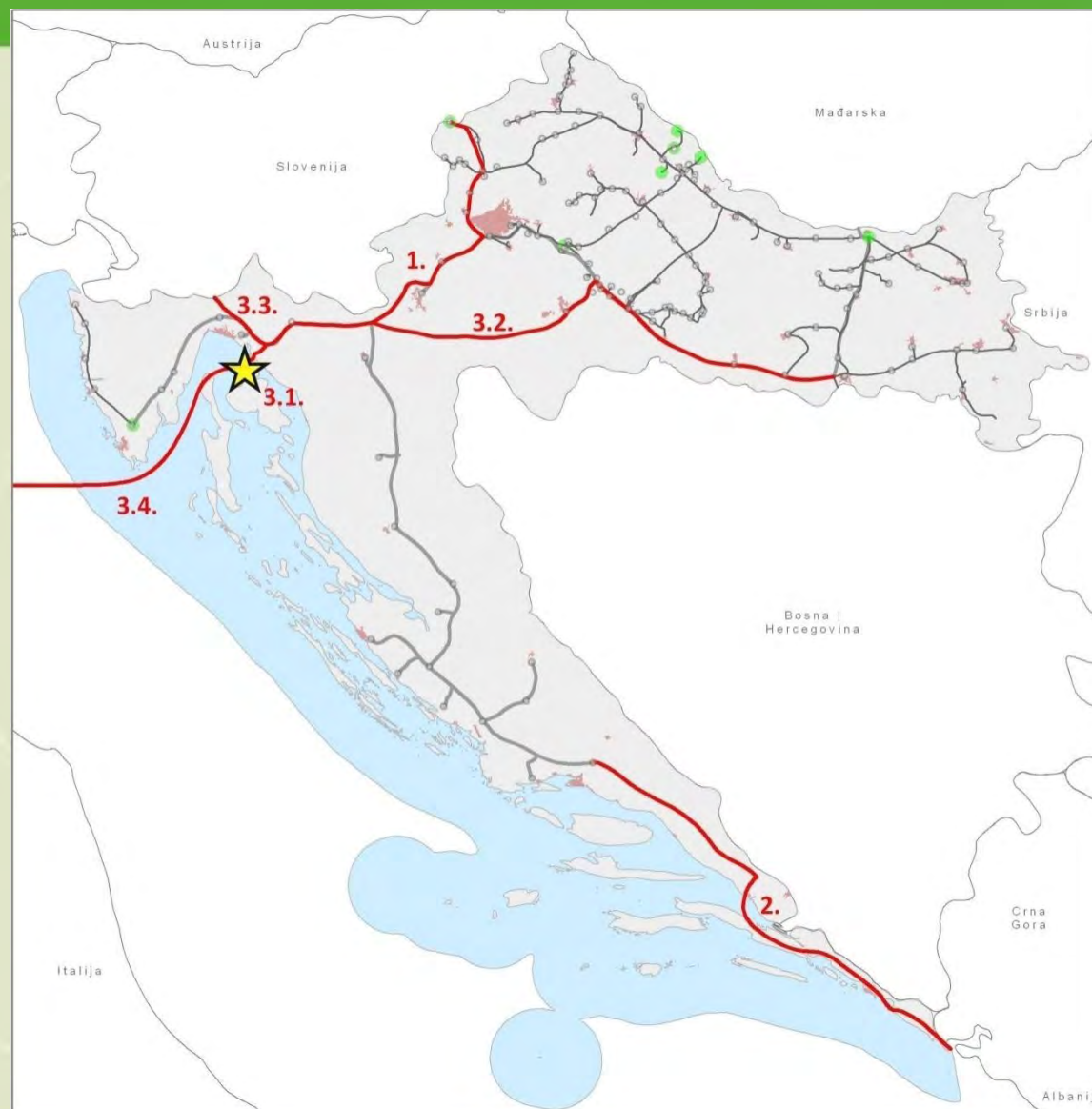
Projection N-1 2015-2024



- LNG
- IAP
- UGS (existing + planned)
- Highly developed gas transport system - TRANSIT

PROJECTS OF COMMON INTEREST- PCI

- **1. Interconnection HR/SLO (Bosiljevo-Karlovac-Lučko-Zabok-Rogatec)**
- **2. IAP**
- **3. Cluster Krk LNG**
 - **LNG Project**
 - **Zlobin-Bosiljevo-Sisak-Kozarac-Slobodnica**
 - **Omišalj-Zlobin Rupa – connected with Jelšane-Kalce**
 - **Omišalj-Casal Borsetti**





PROJECTS OF ENERGY COMMUNITY INTEREST - PECI

- **1. IAP**
- **2. Interconnection HR/BiH (Slobodnica-B. Brod-Zenica)**
- **3. Interconnection HR/BiH (southern interconnection)**
- **4. Interconnection HR/BiH (western interconnection)**
- **5. LNG Project + Zlobin-Bosiljevo-Sisak-Kozarac-Slobodnica**
- **6. Interconnection HR/SRB (Slobodnica – Sotin – Bačko Novo Selo)**

HIGHLY DEVELOPED NATIONAL GAS TRANSMISSION SYSTEM

+

UGS POTENTIALS

+

INTERCONNECTIONS

+

NEW SUPPLY PROJECTS

+

NEW PRODUCTION POTENTIAL



INCORPORATION IN REGIONAL AND EUROPEAN GAS FLOWS



INTEGRATION IN REGIONAL AND EUROPEAN GAS MARKET



IMPORTANT ROLE IN THE SoS OF THE REGION

**Thank you for
your attention!**