

NEW SUPPLY PROJECTS – KEY PROJECTS FOR DEVELOPMENT OF NATURAL GAS MARKET IN THE REGION

**Opening Up the West Balkans Energy Market
Belgrade, 7 March 2012**



A map of Europe is shown in the background, with various countries colored in shades of yellow, orange, and green. The text is overlaid on the map in a large, bold, red font.

**BIG DIFFERENCES IN
DEVELOPMENT OF
NATURAL GAS
SECTOR/NATURAL GAS
MARKET AMONG THE
COUNTRIES IN SOUTHEAST
EUROPE**

A map of Europe and the Mediterranean region, with countries colored in various shades of yellow, orange, and blue. The text is overlaid on this map.

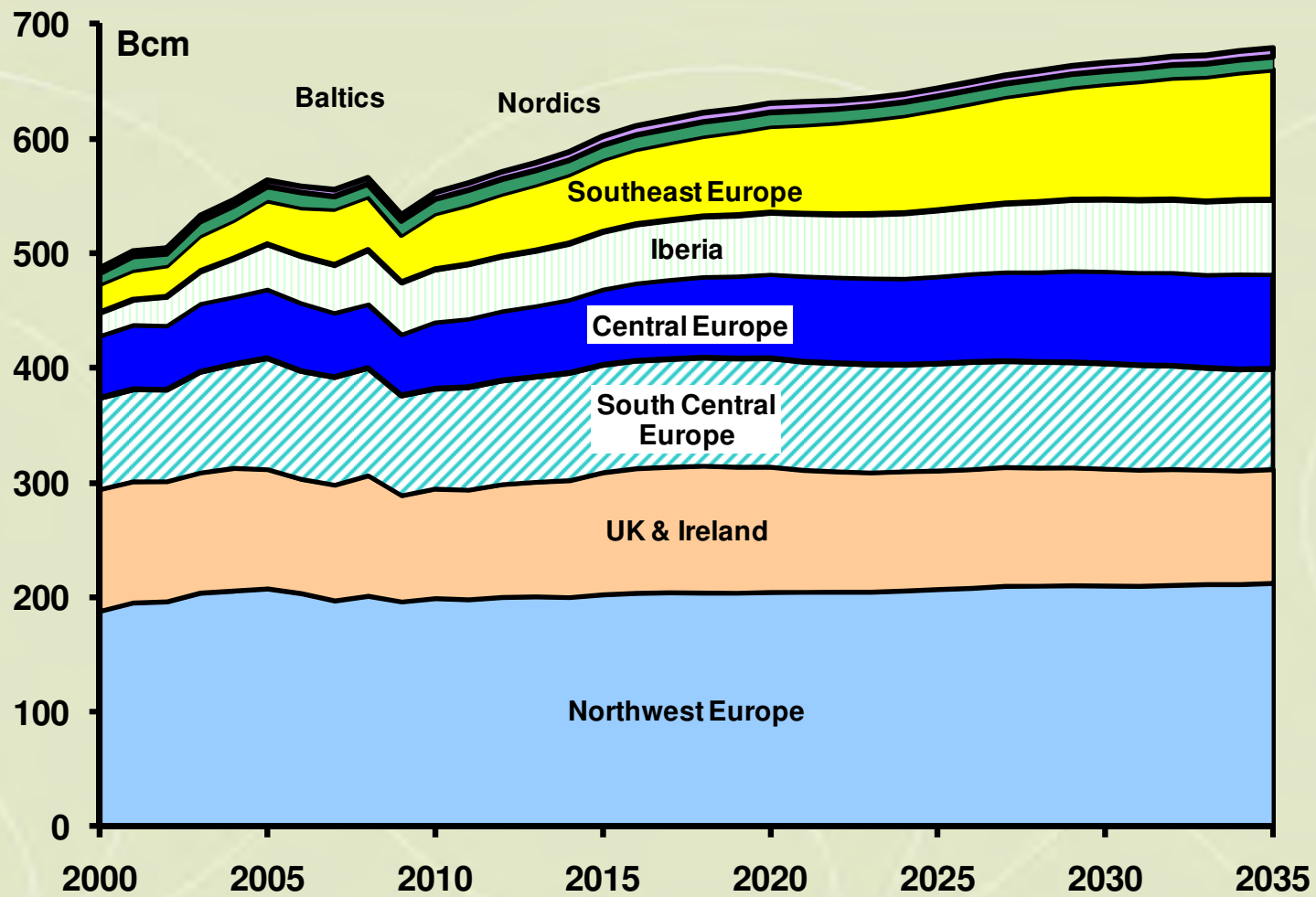
DIFFERENT DEVELOPMENT LEVEL OF NATURAL GAS SECTORS/MARKETS IN SEE COUNTRIES IS A RESULT OF:

- ◆ **POLITICAL DIFFERENCES**
- ◆ **DIFFERENT LEVELS OF ECONOMIC DEVELOPMENT**
- ◆ **NON-EXISTANCE OF OWN NATURAL GAS RESOURCES**
- ◆ **UNAVAILABILITY OF FOREIGN NATURAL GAS RESOURCES CAUSED BY THEIR DISTANCE OR A DISTANCE OF SUPPLY GAS PIPELINES**
- ◆ **AVAILABILITY OF OTHER OWN OR IMPORTED ENERGY RESOURCES**

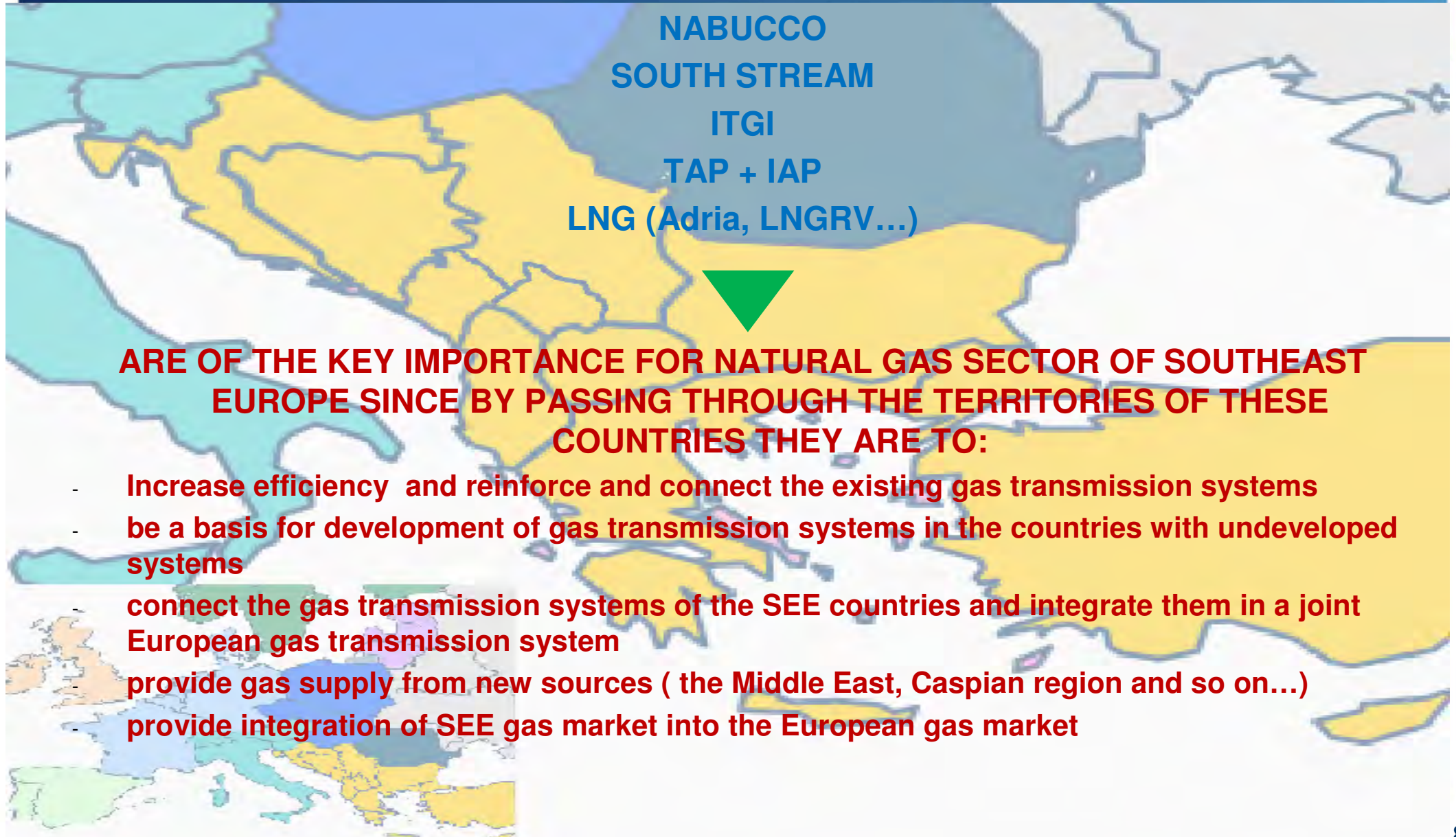
DEVELOPMENT OF NATURAL GAS SECTOR/MARKET



- In some countries (CROATIA, SERBIA and in ALBANIA in one period) based on OWN PRODUCTION and only in a later phase directed towards IMPORT
- Other countries have been focused exclusively on IMPORT (TURKEY, BULGARIA, GREECE, MACEDONIA, BOSNIA AND HERZEGOVINA)
- Natural gas is at the moment unknown term in energy balance sheets of MONTENEGRO AND KOSOVO and a situation in ALBANIA is almost the same







ARE OF THE KEY IMPORTANCE FOR NATURAL GAS SECTOR OF SOUTHEAST EUROPE SINCE BY PASSING THROUGH THE TERRITORIES OF THESE COUNTRIES THEY ARE TO:

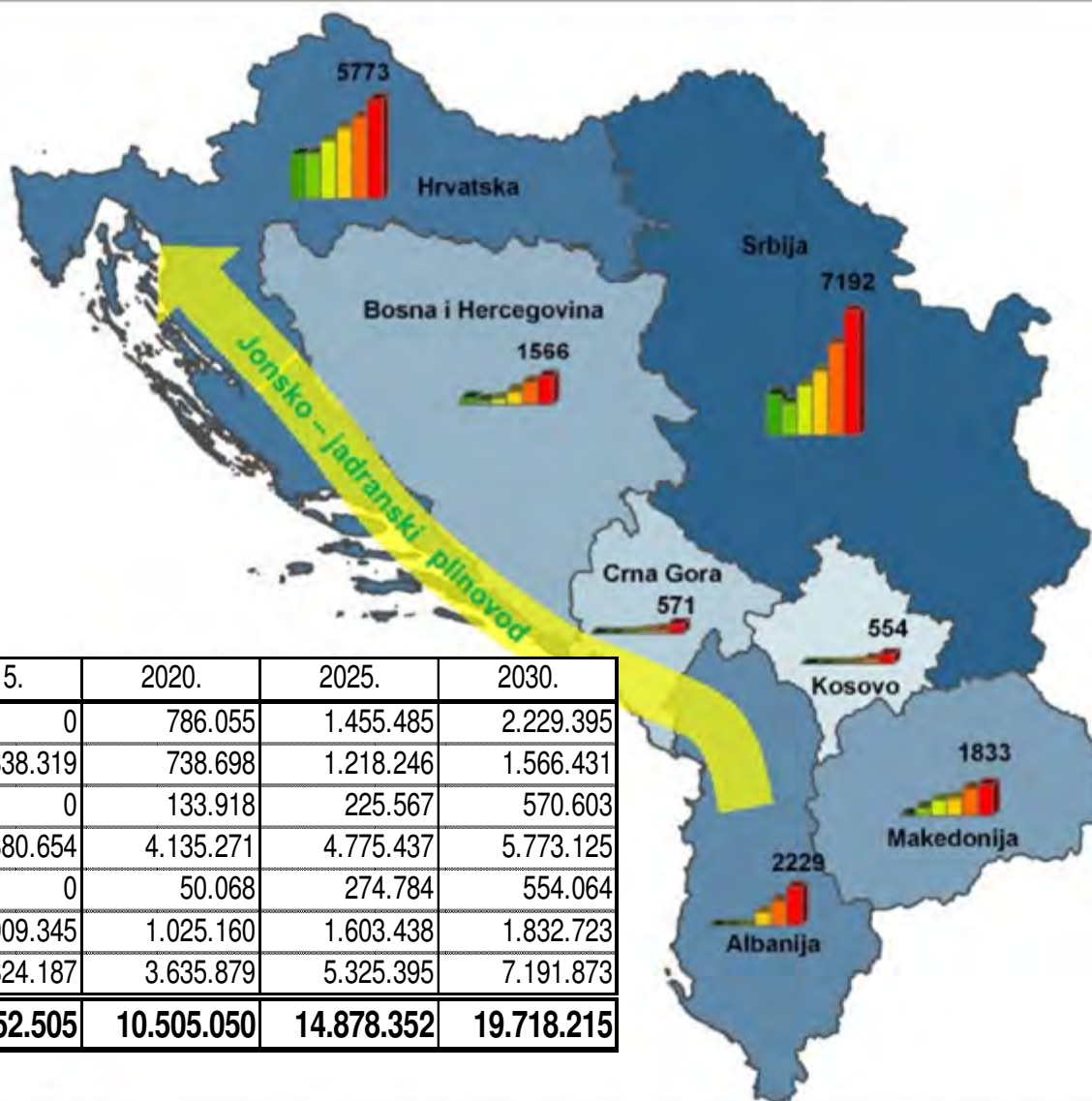
- Increase efficiency and reinforce and connect the existing gas transmission systems
- be a basis for development of gas transmission systems in the countries with undeveloped systems
- connect the gas transmission systems of the SEE countries and integrate them in a joint European gas transmission system
- provide gas supply from new sources (the Middle East, Caspian region and so on...)
- provide integration of SEE gas market into the European gas market

**VICINITY OF NATURAL GAS SOURCES AND ALREADY EXISTING SUPPLY ROUTES
ENHANCED SIGNIFICANTLY DEVELOPMENT OF NATURAL GAS SECTOR IN
TURKEY, GREECE AND BULGARIA**

TURKEY

- **Leader in development of natural gas sector in Southeast Europe**
- **It is becoming a KEY FACTOR of the further development and in a wider European natural gas market**





| Country (1000 m3) | 2010. | 2015. | 2020. | 2025. | 2030. |
|------------------------|------------------|------------------|-------------------|-------------------|-------------------|
| Albania | 0 | 0 | 786.055 | 1.455.485 | 2.229.395 |
| Bosnia and Herzegovina | 242.494 | 338.319 | 738.698 | 1.218.246 | 1.566.431 |
| Montenegro | 0 | 0 | 133.918 | 225.567 | 570.603 |
| Croatia | 3.000.000 | 3.380.654 | 4.135.271 | 4.775.437 | 5.773.125 |
| Kosovo | 0 | 0 | 50.068 | 274.784 | 554.064 |
| Macedonia | 483.677 | 909.345 | 1.025.160 | 1.603.438 | 1.832.723 |
| Serbia | 1.881.141 | 2.824.187 | 3.635.879 | 5.325.395 | 7.191.873 |
| TOTAL | 5.607.312 | 7.452.505 | 10.505.050 | 14.878.352 | 19.718.215 |

**SIGNIFICANT POTENTIALS OF NATURAL GAS CONSUMPTION
IN THIS PART OF SOUTHEAST EUROPE**



**SIGNIFICANT SUPPLY-TRANSIT PROJECTS (South Stream, TAP
+ IAP, LNG on the island of Krk)**



**DEVELOPMENT OF NATIONAL GAS SYSTEMS, THEIR MUTAL
CONNECTING AND INTEGRATION IN THE EUROPEAN
NATURAL GAS FLOWS**



THE FACT THAT EACH COUNTRY OF THE SOUTHEAST EUROPE FOCUSES ON SOME PARTICULAR SUPPLY PROJECTS WHICH IT CONSIDERS MOST INTERESTING IS OBVIOUS AND UNDERSTANDABLE



THE BEST EFFECTS OF NATURAL GAS SECTOR AND MARKET DEVELOPMENT CAN BE ACCHIVED THROUGH THE SINERGY OF REGIONAL APPROACH IN PLANNING AND IMPLEMENTATION

**Thank you for
your attention!**

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