



# Central and South-Eastern European Gas Connectivity (CESEC) High Level Group

## 5<sup>th</sup> Romanian Energy Day European Parliament

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# Security of supply challenge is based on three pillars

- **Improving security of supply by creating competitive gas markets**
- **Reducing import dependency by modernizing the heating and cooling sector**
- **More effective crisis prevention and response based on cooperation and solidarity**

*Regional cooperation as a stepping stone towards an integrated EU market & grid*

# **In addition to common regional vision...**

**... a joined up market brings tangible benefits**

*Potential annual savings are estimated at:*

- \* 30 billion EUR for gas*
- \* 12-40 billion EUR per year for electricity.*

# Central and South-Eastern European Gas Connectivity (CESEC) High Level Group



- Memorandum of Understanding and Action Plan signed on 10 July 2015
- Agreement between 15 EU and Energy Community countries on joint regional efforts to boost diversification and market integration
- Action Plan identifies priority infrastructure projects and sets out actions to tackle market integration issues

**CESEC sides:** European Union, Austria, Bulgaria, Croatia, Greece, Hungary, Italy, Romania, Slovakia, Slovenia, Albania, Former Yugoslav Republic of Macedonia, Moldova, Serbia, Ukraine (and Bosnia and Herzegovina)

# Priority and conditional priority projects under the CESEC High Level Group

## **Priority infrastructure projects**

- *Trans-Adriatic Pipeline*
- *Interconnector Greece – Bulgaria*
- *Interconnector Bulgaria – Serbia*
- *Phased Bulgarian system reinforcement*
- ***Phased Romanian system reinforcement***
- *LNG terminal in Croatia (with phasing potential)*
- *LNG evacuation system towards Hungary*

*(In addition, **Interconnector Bulgaria-Romania** as a key CESEC project)*

## **Conditional priority infrastructure projects**

- ***Connection of off-shore Romanian gas to the Romanian system and further reinforcement of the Romanian system***
- *Interconnector Croatia – Serbia*
- *New Greek LNG terminal*



European Commission



# CESEC priority project: Phased Romanian system reinforcement

PCI 6.24.2      Development on the Romanian territory of the National Gas Transmission System on the Bulgaria–Romania–Hungary –Austria Corridor – transmission pipeline Podișor–Horia GMS and 3 new compressor stations (Jupa, Bibești and Podișor) (1<sup>st</sup> phase)

Technical capacity	Expected commissioning	Completion of pre-construction stages					Construction start/end	
		Pre-feasibility	Feasibility	FEED	FID	Permitting	Start	End
1.75 bcm/y	12/2019	12/2013	09/2015	09/2016 (pipeline) 01/2017 (CS)	06/2016	02/2017	08/2017	12/2019

= BRUA Phase 1: Stage 1 of the Romanian South Corridor

# CESEC conditional priority project: Connection of off-shore Romanian gas to the Romanian system and further reinforcement of the Romanian system

PCI 6.24.7      Expansion of the transmission capacity in Romania towards Hungary up to 4.4 bcm/year (2<sup>nd</sup> phase)

PCI 6.24.8      Black Sea shore – Podișor (RO) pipeline for taking over the Black sea gas

Phase	Techn. capacity	Expected comm.	Completion of pre-construction stages					Construction start/end	
			Pre-feasibility	Feasibility	FEED	FID	Permitting	Start	End
BRUA Phase 2: Stage 2 of the Romanian South Corridor	4.4 bcm/y	2020	12/2013	09/2015	09/2016 (pipeline) 01/2017 (CS)	06/2017	02/2017	2019	2020
Black Sea – Podisor pipeline	6.0 bcm/y	2020	08/2014	01/2016	03/2017	06/2017	03/2017	2018	2020



# Interconnector Bulgaria-Romania

Phase	Technical capacity	Expected commissioning	Construction start/end	
			Start	End
Construction of Ruse GMS	1.5 bcm/y	12/2016*	08/2012	08/2014
Land section on the BG territory			08/2012	08/2014
Land section on the RO territory and Giurgiu GMS			06/2011	05/2013
Danube crossing			04/2016	08/2016 (main pipeline)* 11/2016 (back-up pipeline)*

\* Based on latest indicative information

# **In addition to infrastructure, market measures are necessary...**

## **...to ensure efficient use & implementation of transmission infrastructure**

- ✓ A fully implemented EU acquis
- ✓ Securing access to interconnections and the free flow of gas
- ✓ A regulatory landscape that promotes the efficient functioning of markets and allows for a level playing field between all players

# Next steps

## Agenda for the High Level Group meeting in September

- **Speed up implementation of the CESEC projects**
- **Celebrate the upcoming milestones (RO-BG completion, BRUA start of works)**
- **Agree on a regulatory roadmap**
- **Assess what role CESEC can play in the Energy Union**



CESEC key documents and information can be accessed on:  
***<https://ec.europa.eu/energy/en/topics/infrastructure/central-and-south-eastern-europe-gas-connectivity>***

Thank you for your attention!