



Stručna konferencija JP Elektroprivrede Srbije i Balkanmagazina

„Energetska sigurnost”

pod pokroviteljstvom Ministarstva rudarstva i energetike Republike Srbije



Република Србија
МИНИСТАРСТВО
РУДАРСТВА И ЕНЕРГЕТИКЕ

Prirodni gas

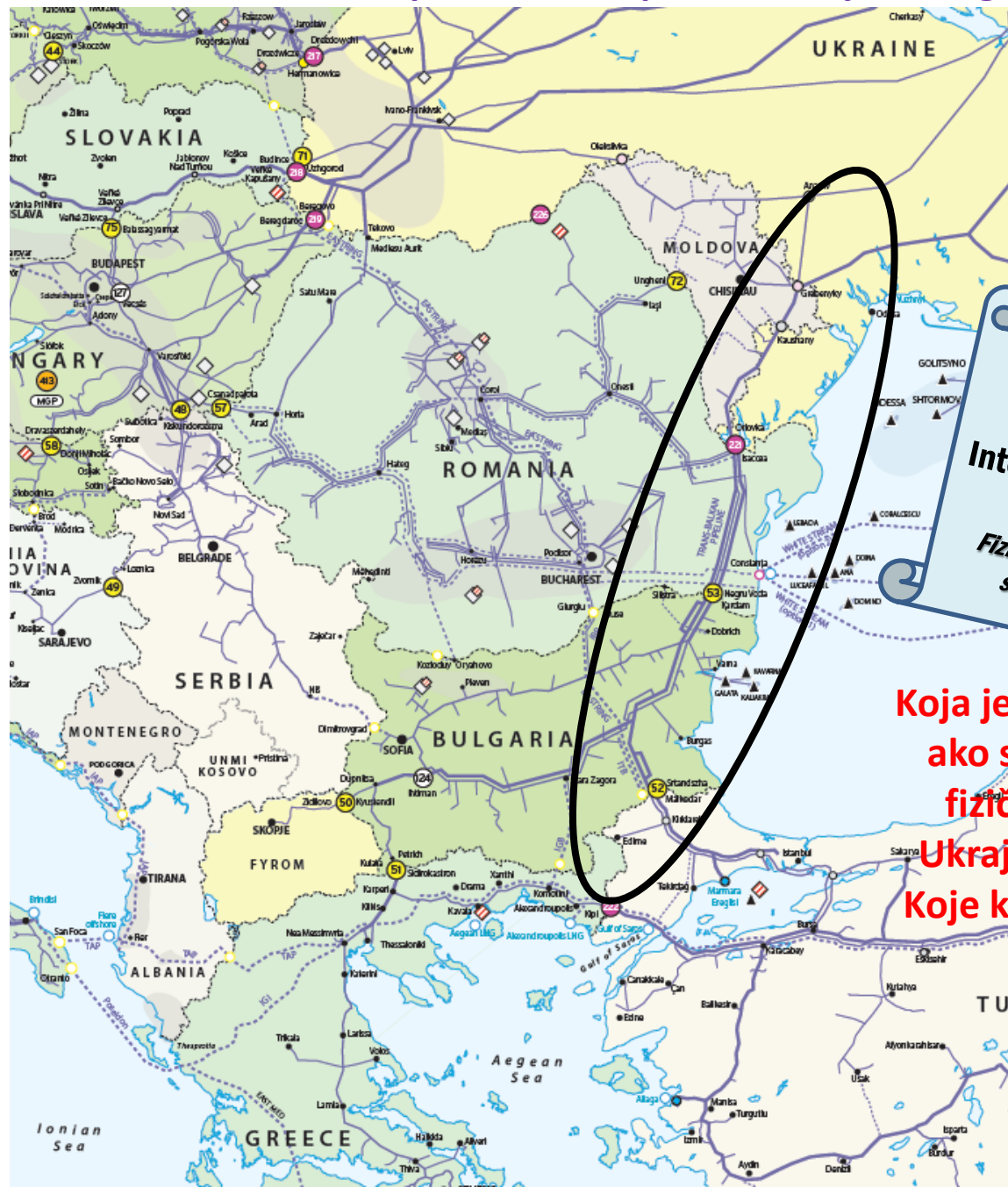
Milan Zdravković, JP SRBIJAGAS

Gasovodna infrastruktura Jugoistočne Evrope

– Zapadni Balkan kao izolovano ostrvo



Trans Balkanski Gasovod – prioritet Evropske Komisije za Region?

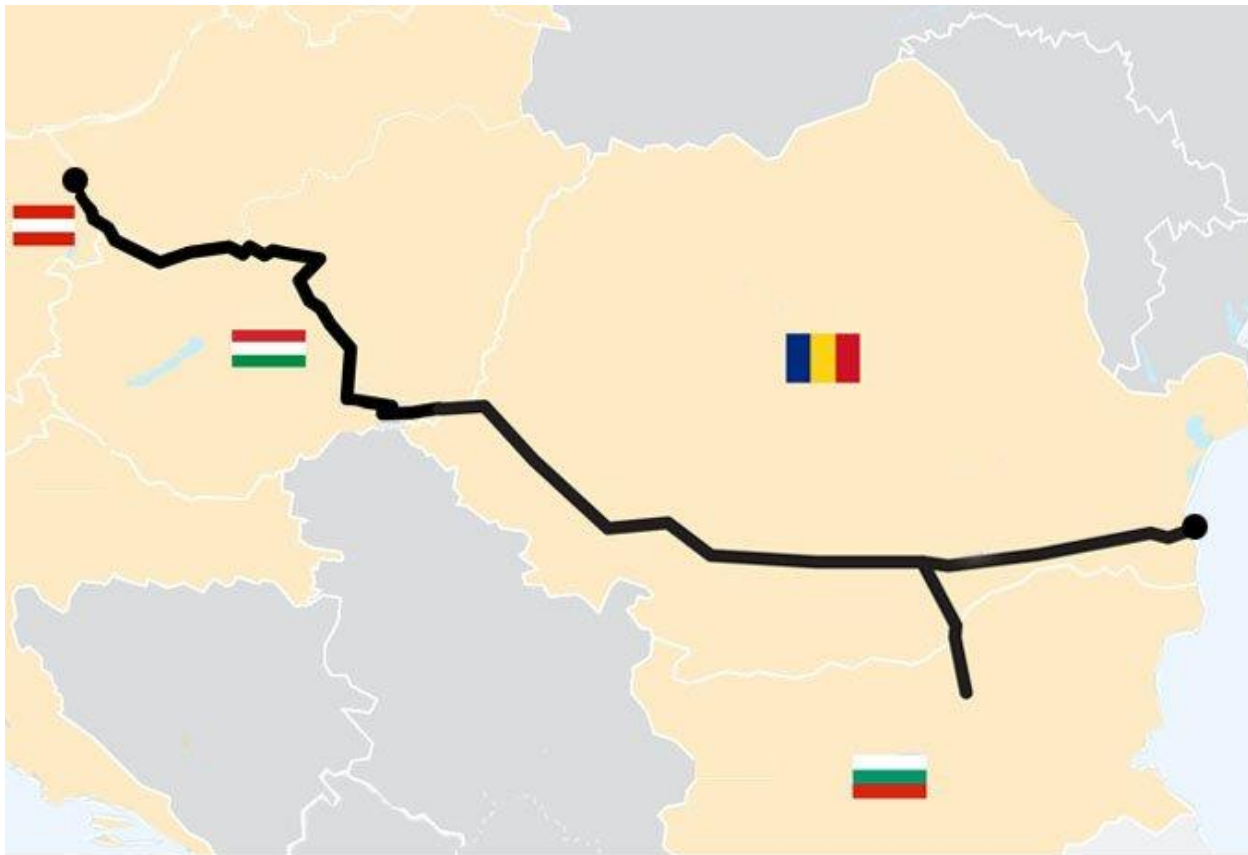


Ugovori na
Interkonekcijama

Fizičko / Virtuelno
snabdevanje

Koja je perspektiva Srbije
ako se zaista realizuje
fizičko snabdevanje
Ukrajine ovom rutom?
Koje količine gasa ostaju
Srbiji?

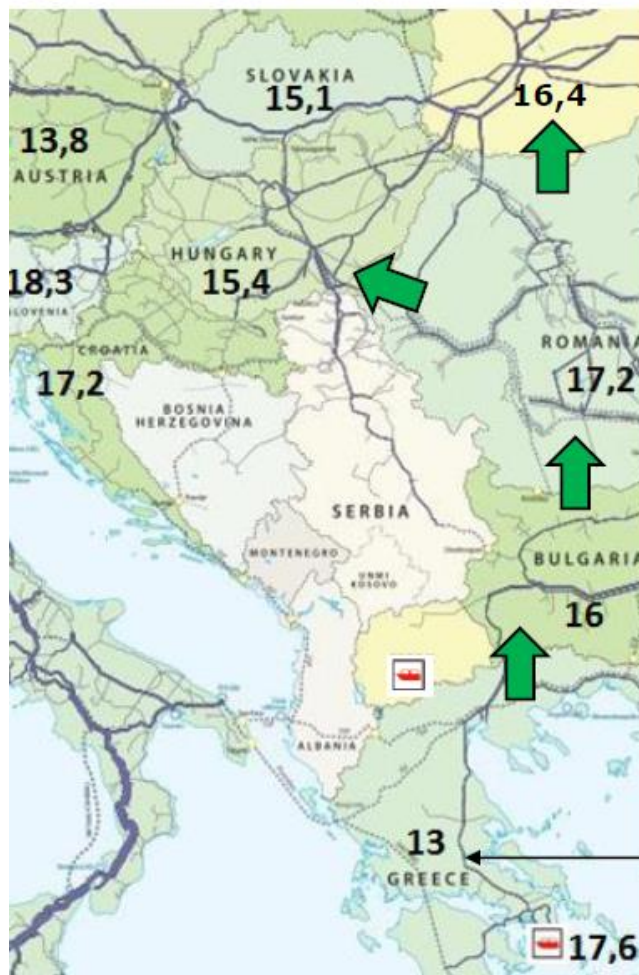
BRUA Gasovod – prioritet Evropske Komisije za Region?



The BRUA pipeline
will give 47 million
consumers in
Bulgaria, Romania,
Hungary and Austria
access to new
sources of gas

Can LNG be competitive and if so, how far inland?

Scenario 1 – "Greek LNG"



Route	Transport Cost (€/MWh) (Exit/Entry)	Spread to EL (incl. Transport)	Spread to EL LNG (incl. Transport)
LNG → EL (Regas* + Entry EL)	0,56 (0,39/0,17)	-4,60 -5,16	
EL → BG**	1,03 (0,15/0,88)	3,00 1,97	-1,60 -3,13
BG → RO***	2,08 (0,88/1,20)	4,20 1,09	-0,40 -4,01
Alt. 1 RO → UA****	1,45 (0,49/1,05)	-0,82 -5,41	-1,22 -6,37
Alt. 2 RO → HU	5,42 (3,67/1,74)	2,40 -8,08	-2,20 -12,68

Note: Scenario for "Southern Gas Corridor" would have similar economics

Can LNG be competitive and if so, how far inland?

Scenario 2 – "Croatian LNG"



Route	Transport Cost (€/MWh) (Exit/Entry)
Alt. 1 LNG → HR (Regas* + Entry HR**)	5,18 (5,00/0,18)
Alt. 2 LNG → HR (Regas* + Entry HR**)	2,68 (2,50/0,18)
HR → HU***	7,07 (5,82/1,25)

Investment in new LNG export capacity has ground to a halt

Medium-Term
Market Report
2016

Final investment decisions in liquefaction capacity by year



The collapse in investment increases the risk of tighter markets in the next decade; concerns about gas supply security could quickly re-emerge

OECD Europe's gas balance: A changing supply mix

Between 2010 and 2015, two major developments shaped the gas balance in the Europe region of the Organisation for Economic Co-operation and Development (OECD): first, a change in the suppliers' contribution to the supply mix with an increasing share of Russian and Norwegian quantities; and second, lower gas consumption, mainly caused by lower gas usage from the power sector (IEA, 2016a).

The changes in the supply mix, shown in Figure 5, have different explanations: one significant factor is a decline in domestic production, led by the Netherlands and the United Kingdom (UK), falling in total from around 190 billion cubic metres (bcm) in 2010 to about 130 bcm in 2015, a development that has been faster than anticipated with respect to the Netherlands due to the production cap on the Groningen field imposed by the Dutch government. Two other explanations are lower LNG imports, falling from 90 bcm to 50 bcm (or from 15% to 10% of the supply portfolio) – mainly due to European gas hub prices below Asian gas prices in the past years – and the drop in Africa's contribution to the supply mix (from 45 bcm to 30 bcm), largely caused by lower pipeline volumes from Algeria (lack of investment and growing domestic demand) and Libya (political unrest).