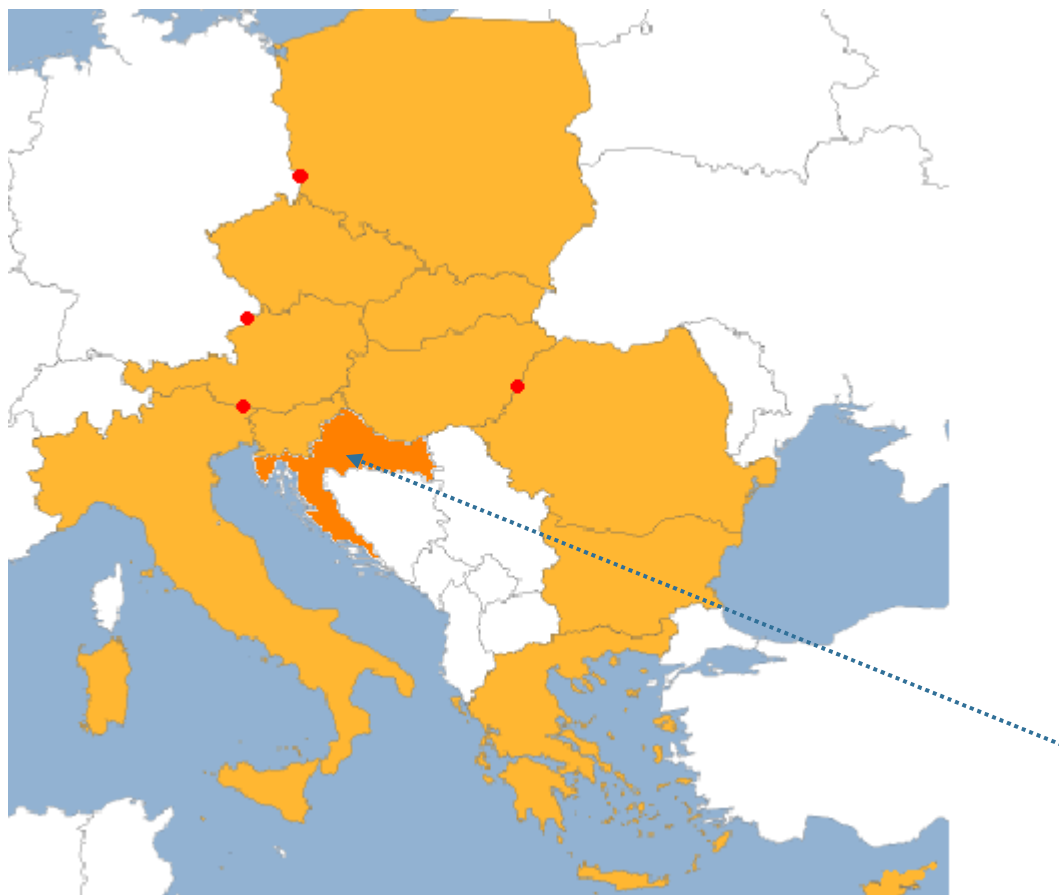


Progress report on key projects - GRI South South-East

Marek Woszczyk
GRI SSE co-Lead Regulator – ERO

24th Madrid Forum, 15-16 October 2013

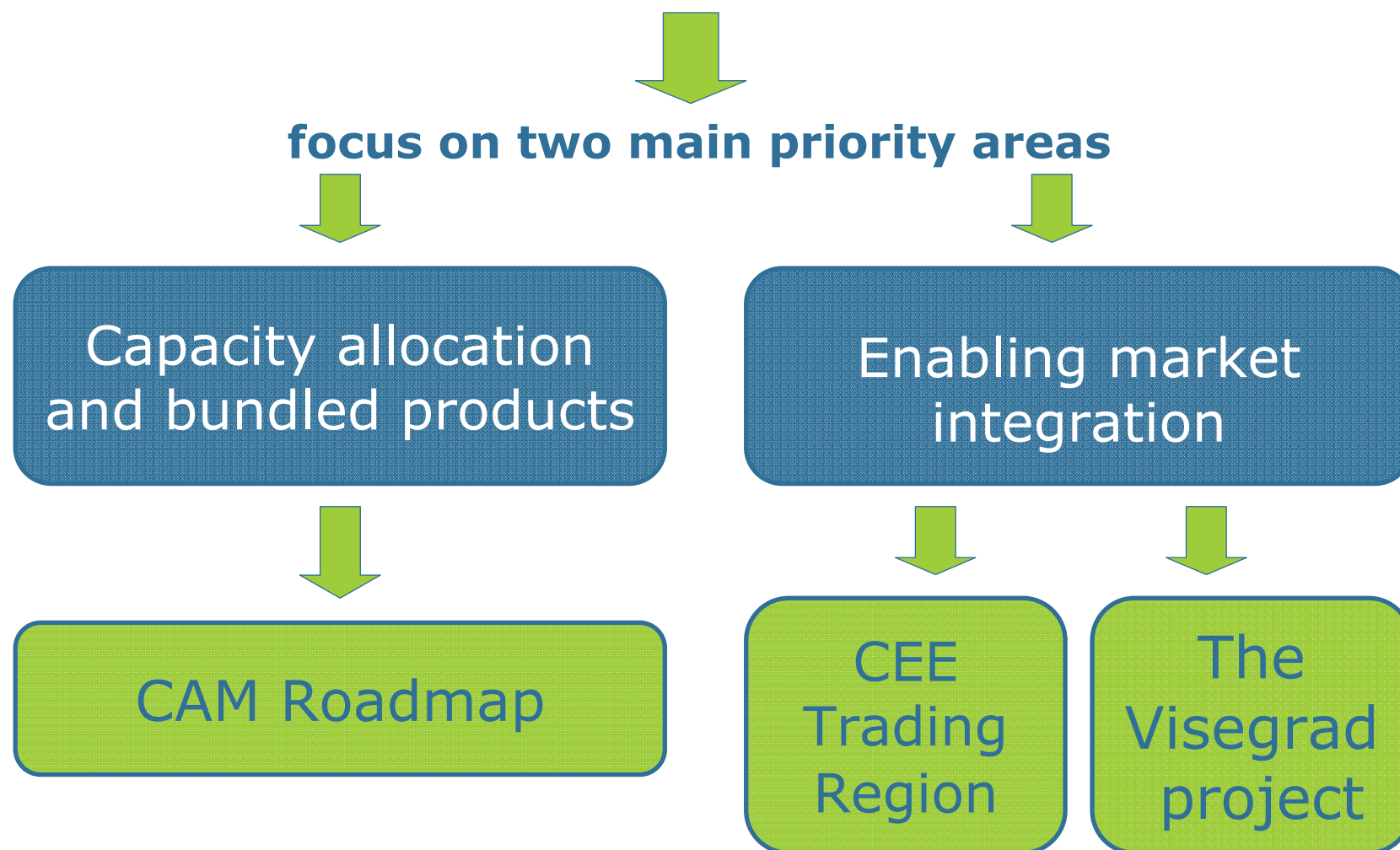
Geographical scope of the GRI SSE



Austria
Bulgaria
Cyprus
Czech Republic
Greece
Hungary
Italy
Poland
Romania
Slovakia
Slovenia

On 1 July 2013
Croatia joined
the GRI SSE

Current work in progress within GRI SSE in 2013



CAM Roadmap – current SSE pilot projects

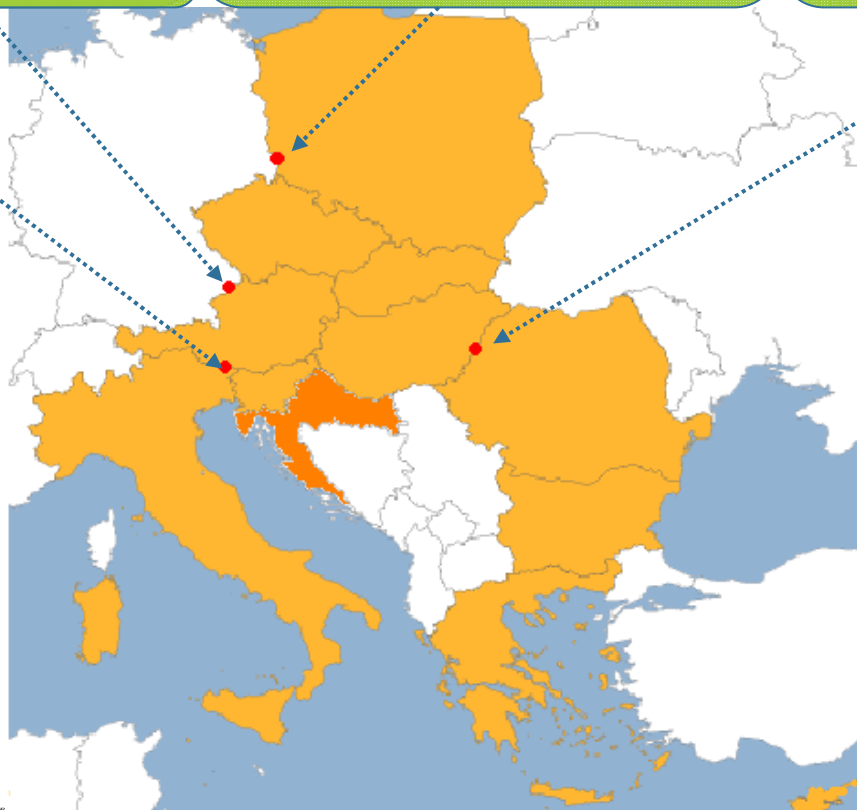
PRISMA

Bundled
capacity
allocation
at AT/IT IP

Oberkappel
IP
(AT/DE)

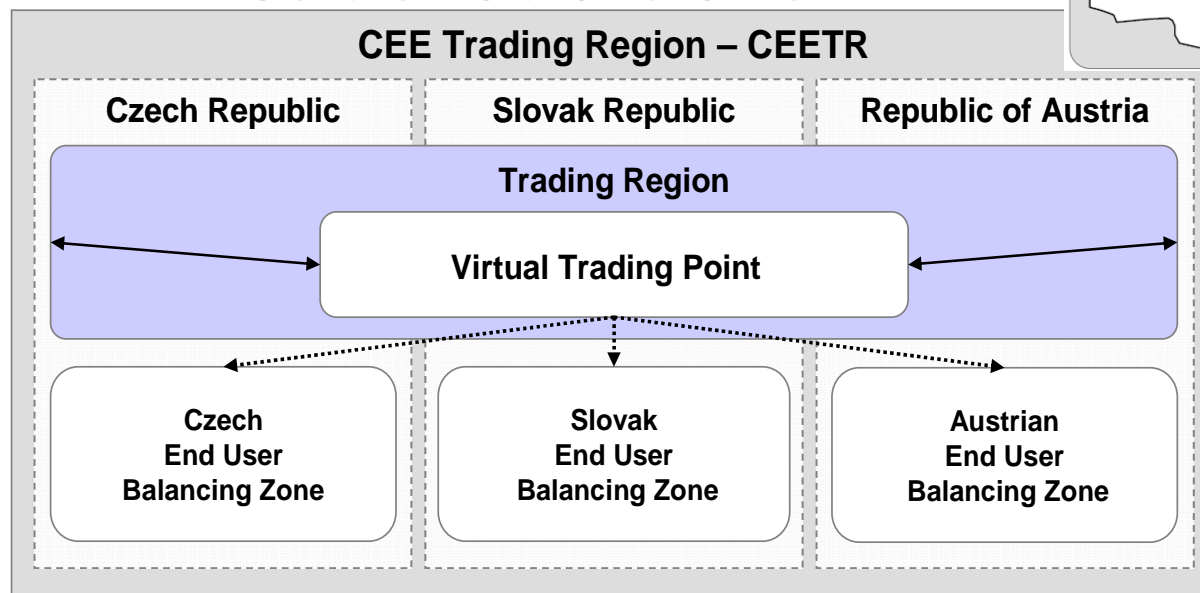
Bundled capacity
product at Lasów
IP (PL/DE)

Bundled product
and capacity
platform HU/RO

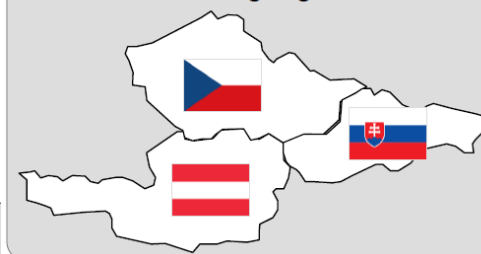


CEE Trading Region

Basic structure of CEETR



CEETR – CEE Trading Region

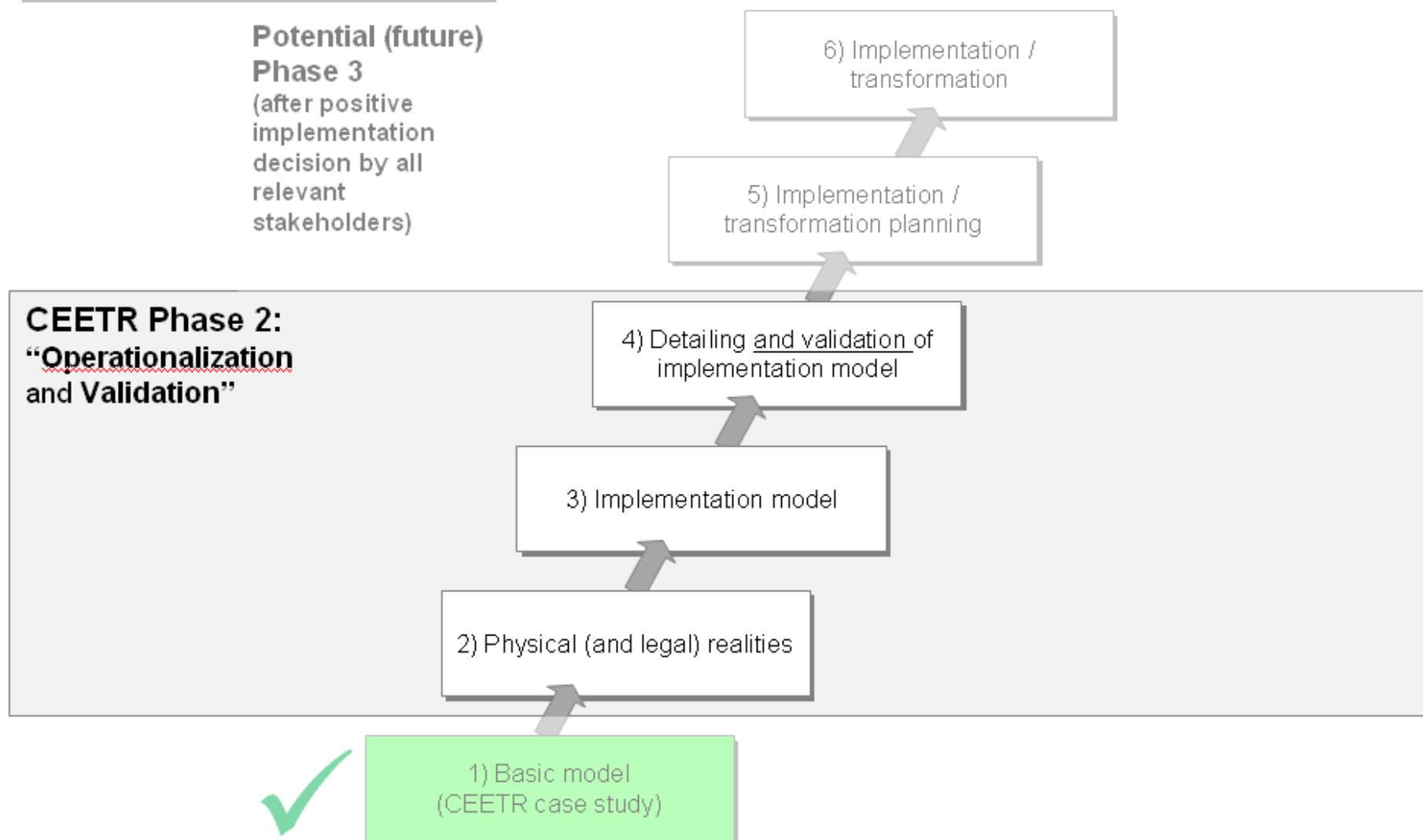


↔ Nominated transfer of gas into / out of the trading region (physical mainflow or counterflow transport)
> Nominated transfer of gas from the balancing system of the trading region to an end user balancing zone

Structurally, CEETR is made up of the following components:

1. One Trading Region
2. One Virtual Trading Point
3. Three End User Balancing Zones, one per participating country

Goals for Phase 2



Process update

- Delay in the launch of phase 2 due to unclarity about overlap with other projects in the region
- Possible change in geographical scope to be decided until end 2013

Origins of the V4 project

Towards the regional gas market

- V4 project is a governmental initiative initiated by the Polish Presidency in the Visegrad Group (July 2012–June 2013)
- On 31 October 2012 the V4 Ministers of Economy signed a MoU on gas market integration in the V4 region
- The V4 project aims at:
 - Exploring the potential for gas market integration within the V4 Group
 - Elimination of regulatory and trade barriers between the V4 countries
 - Streamlining the cooperation of V4 competent authorities, NRAs, TSOs



In June 2013 the V4 Prime Ministers endorsed a
Road Map towards the V4 regional gas market

Key priorities of the Roadmap

I. Physical integration of the Visegrad region

- indispensable and fundamental for the credibility of any further integration plans in the V4 region
- providing a necessary political support for developing key gas infrastructure in the region within the flagship project N-S corridor in Central-Eastern Europe

Infrastructure	Central and Eastern Europe Gas Regional Investment Plans (CEE GRIP) agreed	06.2014	TSOs
	Implementation of the key interconnection projects in the V4 region	2017/2018	TSOs
	Poland-Slovakia (subject to FID)	2017/2018	GAZ-SYSTEM S.A./ Eustream, a.s.
	Slovakia-Hungary	2015	Eustream, a.s. / Magyar Gáz Tranzit Zrt.
	Poland-Czech Republic (subject to FID)	2017/2018	GAZ-SYSTEM S.A. / NET4GAS, s.r.o.

V4 project – key priorities of the Roadmap (2)

II. Market design for the Visegrad region

- working on an optimal market model for the region
- coordinating implementation of EU gas Network Codes in the region
- drafting an operational study to implement the multi-coupled market zones model in the V4 and to take decisions about its future shape and progress

III. Institutional framework for the process

- ***V4 Forum for Gas Market Integration*** established to provide political support and coordination among V4 Ministries of Energy, NRAs, TSOs and navigate the regulatory harmonisation

IV. External dimension of the V4 gas market integration

- readiness to extend the framework of the V4 cooperation

Future V4 presidencies need to continue implementing the Roadmap's priorities

Correlation of the CEETR and V4 project

The two projects appear complementary however there is a need to monitor the CEETR and V4 projects to ensure coordination and alignment between them.

Thank you for your attention!



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