

Moldovan Gas Market



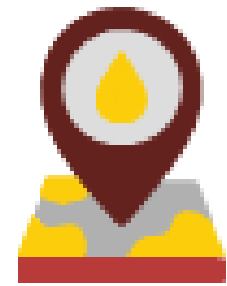
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Content



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Gas supply in Moldova until 2022



Main achievements



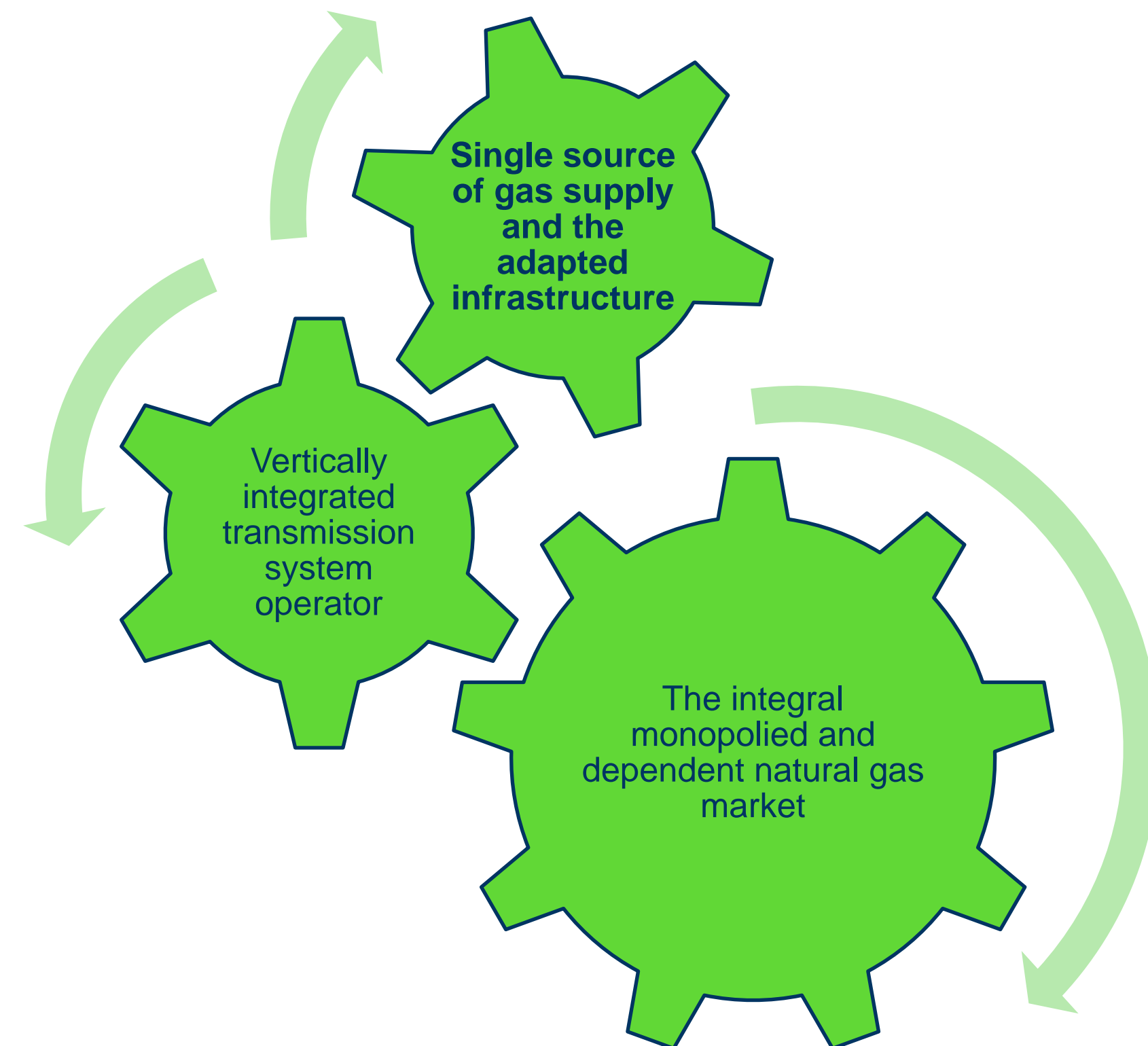
Market development and gas infrastructure



Historical Dependency on Russian Gas



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In October 2021, Gazprom reduces by 50% the volume of gas delivered to the Republic of Moldova, which starts a long energy crisis and a period of essential changes in the Moldovan energy sector



Main achievements:



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- Trans-Balkan Pipeline reverse flow
- Iasi-Ungheni Pipeline operationalization
- The development of JSC Energocom, an owned state company
- Unbundling of the Transmission System Operator
- Free and transparent gas market
- Active exchange in the field of natural gas - BRM East Energy



Implementation of the provisions of the CESEC Gas Action Plan



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| Country | Action | SoP | Deadline |
|---|---|---|----------|
| Greece, Bulgaria, Romania, Ukraine, Moldova | <p>Trans-Balkan Pipeline (TBP) reverse flow</p> <ol style="list-style-type: none"> 1. Establish firm capacity at all IPs along TBP T1 2. Signing of an updated MoU between the TSOs of Greece, Bulgaria, Romania, Ukraine and Moldova on reverse flows TBP T2 and T3. This MoU should include possible technical solutions for reverse physical flow options on T2 and T3 and details of an appropriate market testing/capacity enhancement procedure. 3. Conclusion of an interconnection agreement between TSOs in Bulgaria, Greece and Turkey providing a transparent framework for non-discriminatory access to the gas transmission infrastructure between Bulgaria and Turkey as well as between Greece and Turkey. | Market tests are currently ongoing for IP Kulata/Sidirokast ro and IP Negru Voda/Kardam | 2024 |



Implementation of the provisions of the CESEC Gas Action Plan

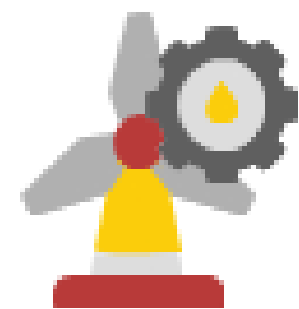


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| Country | Action | SoP | Deadline |
|------------------|--|--|----------|
| Ukraine, Moldova | <p>Fostering reverse flow transit on the Trans-Balkan Pipeline (TBP)</p> <ol style="list-style-type: none"> 1. The aim is to take the abundant volumes of natural gas available in the southern Balkan Peninsula (TANAP and LNG terminals) and transport them to underground storage in the western region of Ukraine. These will become of strategic importance with the cessation of Gazprom's transit of natural gas through Ukraine from 1 January 2025. 2. The goal is to establish common conditions between the TSOs of Ukraine and the Republic of Moldova for capacity reservation and allocation at the TBP Interconnection Points (IPs) from Isaccea/Orlovka IP to Oleksiivka IP. 3. Establish attractive commercial conditions to encourage trading companies to choose the reverse TBP route for natural gas transportation over other existing routes. | Currently the TSO of Moldova together with ANRE and SCE are considering the necessary changes in the Network Code and Tariff Methodology.. | 2024 |



Transition to European and Green Gas Sources



Entering the European market

The decision to stop purchasing gas from Gazprom and the subsequent transition to procuring gas from the European market, making a significant shift in Moldova's energy procurement strategy

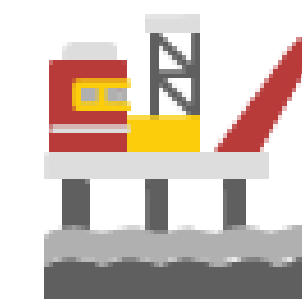


Partnerships and Regional Cooperation

Moldova's collaboration with European traders and its participation in the Vertical Corridor, emphasizing the country's efforts to enhance regional gas supply security



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Emergency measures and Gas Stocks

The establishment of an Emergency Plan and the gas stocks underscore the national energy security



Analysis of the current situation of the gas transportation infrastructure and the establishment of the necessary interventions for its adaptation in view of the injection of other types of fuels, including hydrogen, separately or in the gas mix.



Vă mulțumesc

