



Roundtable update

Domestic gas sector in winter 2022/23 with possible 2023/24 outlooks

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SoS and sourcing (1)



For gas exporting countries:

1. Pipeline/LNG exports outlook 2022/23 and plans for 2023/24?

- Moldova is not a natural gas exporting country.

2. Meeting domestic demand – any difficulties (e.g., maintenance)?

- The biggest foreseeable risk in meeting domestic demand is the issue with the Russian supplier not providing all the contracted volumes of natural gas.

For gas importing countries:

1. Sources for supply/structure of imports?

- The Russian Federation remains the main source of imports of natural gas for the Republic of Moldova, with natural gas being imported through Ukraine.
- In case of a technical emergency Moldova to a certain extent could import volumes from Romania.

SoS and sourcing (2)



For gas importing countries:

2. New import routes? 2022/23 and plans for 2023/24?

- In the following years Moldova is aiming to increase the use of its interconnection pipeline with Romania as future alternatives of supply for natural gas.
- The country's authorities are also considering the option of importing natural gas from Greece via the southern corridor of Bulgaria and Romania, however there are still technical barriers with regards to the quality of the gas

3. Meeting domestic demand – any policies to limit demand?

- The government authorities have launched media campaigns on educating the population and promoting a more efficient and conservative use of natural gas.
- The country's main CHPs have been switched to alternative fuels as well. | 3 |

Storage



1. If domestic storage - current level (% + TWh) of storage.

At this time Moldova does not possess any natural gas storage infrastructure.

2. If domestic storage unavailable - options for cross-border storage access.

Moldova has stored over 200 million m³ of natural gas in Ukrainian underground storages, which currently is used to regulate the imbalances of the Russian supply of gas.

3. Any other relevant information

Romania has expressed its continuous support to in order to act as both an additional supplier and potential natural gas storage alternative for Moldova.

4. Anything to change by 2023/24?

No foreseeable changes are expected during the next yearly period.

Tariff/market considerations



1. Any new rules to apply for recovering cost of fuel?

2. Protection of households – any support schemes in place?

The government authorities have approved a support program, which offers subsidies to households consumers for a certain quantity of monthly consumed energy.

3. New challenges in 2023/24?

Diversification of supply sources and building up additional energy reserves.

4. New tariff proposals:

- Overall the approach for determining the costs incurred by TSOs DSOs has not been changed;
- A new change was made in the tariff methodology where both the previous year and current year cost deviations are taken into account.



**THANK YOU
FOR YOUR ATTENTION!**

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