



## Roundtable update

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

**Energy and water services Regulatory Commission of the Republic of North Macedonia**



# SoS and sourcing

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- Republic of North Macedonia doesn't have domestic production, and the entire quantity of natural gas is imported from Russia, through the gas pipeline system of the Republic of Bulgaria.
- The exit from the Bulgarian system has been fully booked by Gazprom
- the interconnection agreement signed by the two neighboring operators, GAMA and Bulgartransgaz, which will be fully implemented from January 1, 2023, will allow unused capacity to be released and allocated in accordance with the Network Code for Capacity Allocation.
- The North Macedonia - Kosovo\* Interconnector and the Serbia - North Macedonia Interconnector are PEI projects.
- The North Macedonia - Greece interconnector is progressing and a final investment decision is expected by the end of 2022.

# SoS and sourcing

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- the Government did not declare crisis measures for gas sector.
- a crisis situation has been declared in the supply of heat energy for this heating season, as a result of not having enough financial resources for the purchase of natural gas by the companies
- In 2022, there are two entities as importers of natural gas, such as Makpetrol AD Skopje and TE-TO AD Skopje
- From 2022, the contracts signed by the traders have been changed and now the purchase of natural gas from Gazprom is based on: 70% is the price from TTF and 30% is the price obtained according to the oil formula.
- as a result of the high price of natural gas, the consumption of natural gas by industrial consumers has so far decreased by more than 30% compared to the same period of 2021.

- new rules to apply for recovering cost of fuel are not proposed as a measure and there will be none consumer support schemes in place
- New challenges in 2023/24
  - TSO to be unbundled and the Ministry of Economy will become full owner of the natural gas transmission system operator
  - ERC shall issue a license for the execution of the energy activity natural gas transmission to the newly-formed natural gas transmission operator,
  - ERC shall certify the transmission system operator with the Third Package of the European Union internal market legislation.
  - The new natural gas transmission operator shall continue with the preparation and adoption of the remaining legislation from the field of natural gas, provided in the Law on Energy, which will be published after being previously approved by ERC.



**THANK YOU  
FOR YOUR ATTENTION!**

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