

INTERCONNECTIONS AND TRANSIT

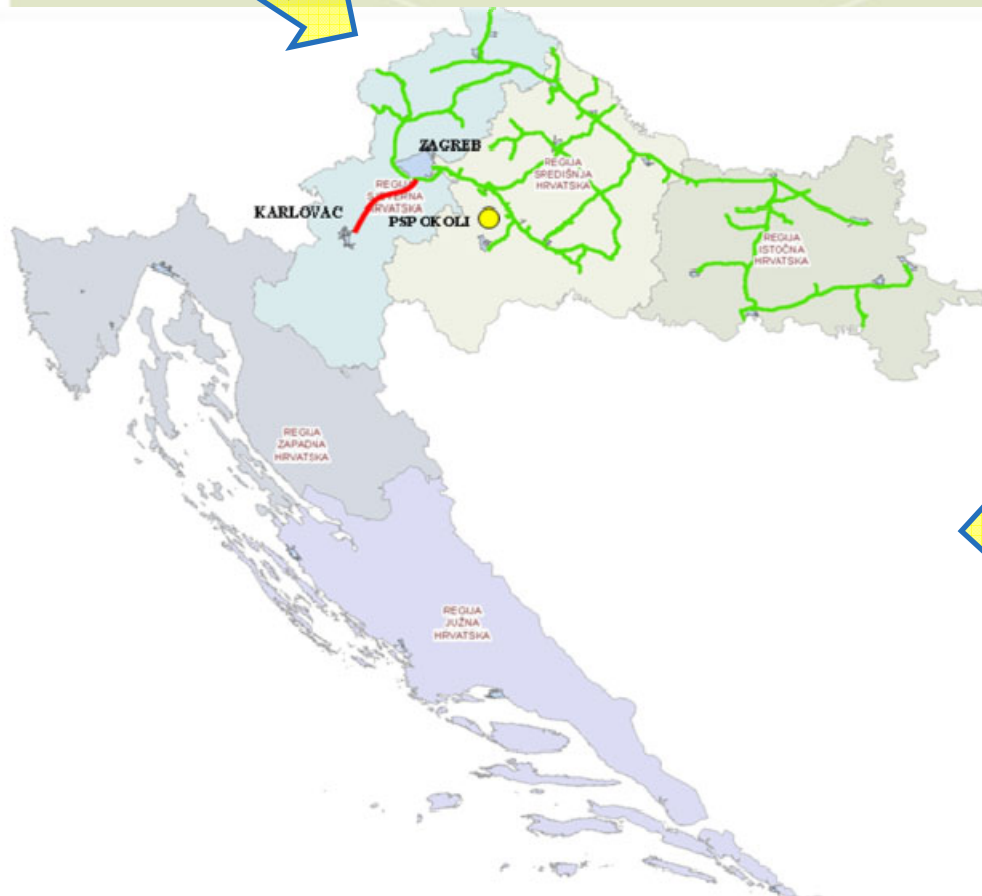
INTEGRATION OF THE REPUBLIC OF CROATIA IN THE REGIONAL AND THE EUROPEAN NATURAL GAS FLOWS AND NATURAL GAS MARKET

**Energy Charter – Stakeholder Event on Gas Transit and Cross-border
Cooperation
Brussels, 19 June 2012**

DEVELOPMENT OF THE GAS TRANSMISSION SYSTEM IN THE REPUBLIC OF CROATIA

2002.

1.5 bcm

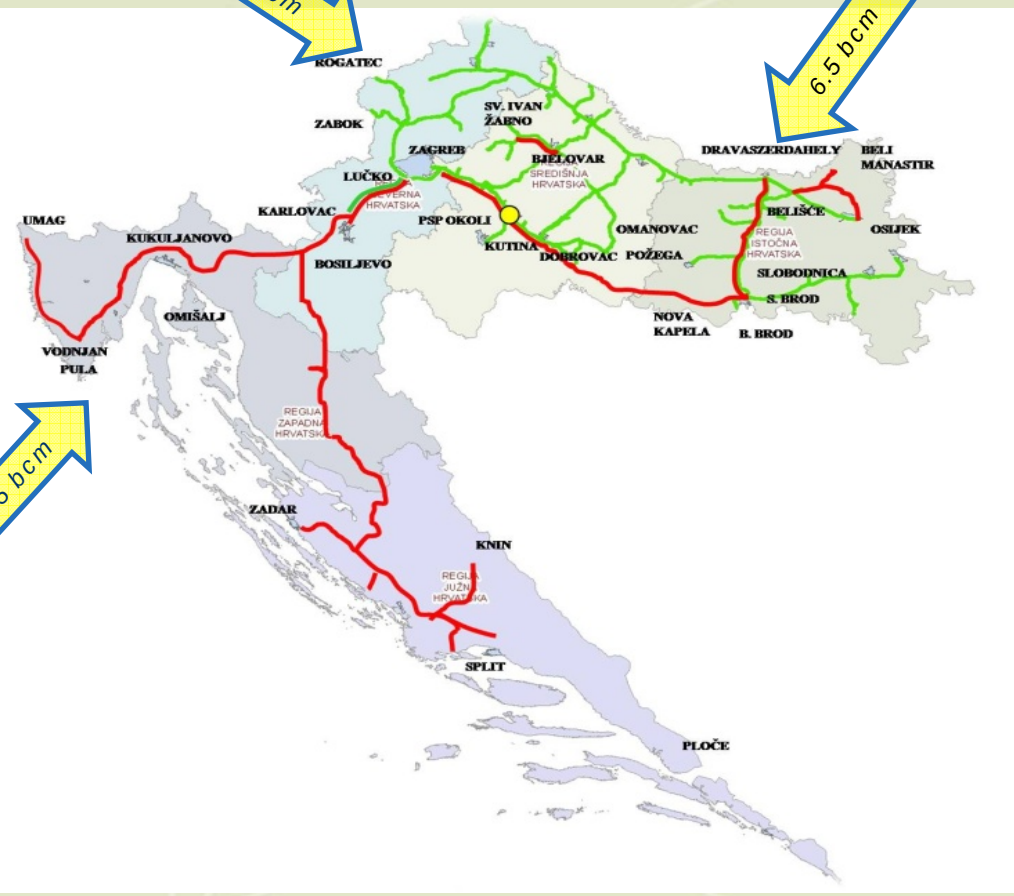


2012.

1.5 bcm

6.5 bcm

1.5 bcm



EUR 600 mil were invested during the 10-year cycle

Up to now development of the gas transmission system of Croatia was directed towards its own needs-**development of the national gas transmission system**

However, following was taken into consideration as well:

- Needs of the neighbouring countries
- Open activities regarding connection with gas transmission systems of the neighbouring countries (interconnection with Hungary...)



Currently, development of the gas transmission system has been directed to:



- Development of new supply projects and connecting with them
- Connection with the gas transmission systems of the neighbouring countries



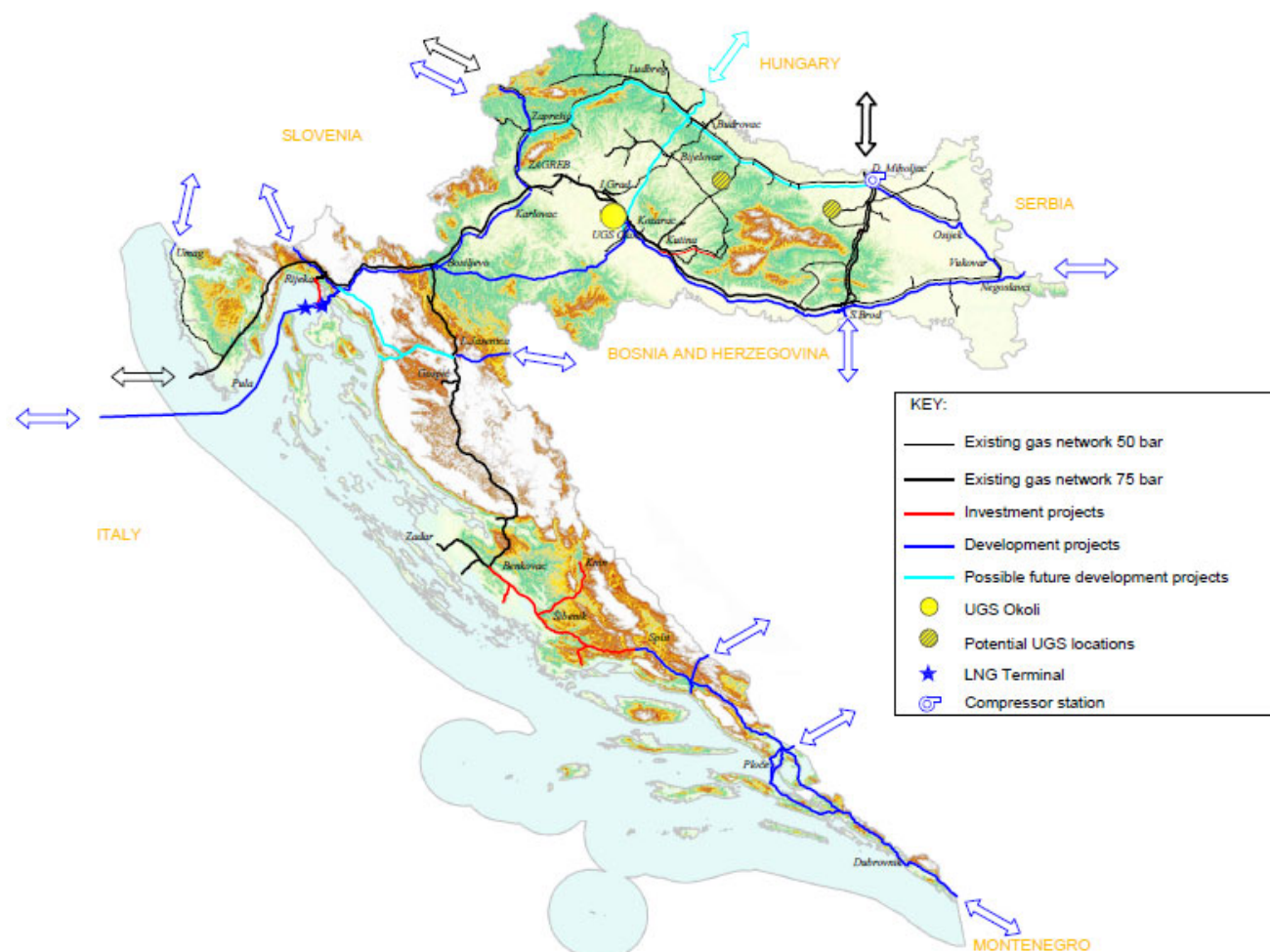
**INTEGRATION OF CROATIA IN THE REGIONAL AND THE EUROPEAN
NATURAL GAS FLOWS AND NATURAL GAS MARKET**

Interconnections:

- Interconnections Croatia/BiH
- Interconnections Croatia/Slovenia
- Interconnection Croatia/Serbia
- Interconnection Croatia/Italy

Regional projects:

- Ionian-Adriatic Pipeline (IAP)
- LNG Project
- South Stream
- North – South Gas Corridor/NETS



AGGRAVATING CIRCUMSTANCES FOR CONNECTING GAS TRANSMISSION SYSTEMS AND TRANSIT IN THE COUNTRIES IN THE CROATIAN SURROUNDING

- **Economic and political differences**
- **Different levels of natural gas sector/market development**
- **Different development levels of legislative-legal frameworks and their compliance**
- **Financing – inaccessibility or minimum accessibility of EU funds to the countries which are EU non-members**



HOWEVER THE SCOPE AND THE QUALITY OF REGIONAL COOPERATION IS INCREASING

**Thank you for
your attention!**

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