



20th Energy Community Gas Forum

Location: Steigenberger Hotel Herrenhof, Herrengasse 10, 1010 Vienna

Date: Thursday, September 25, 2025

1. Session I: Diversification of gas supplies and security of supply – the new reality

01. The Forum praises the Contracting Parties for their efforts in securing the gas supply, storage and for putting in place critical measures to ensuring regional energy security and market stability.
02. Amid ongoing geopolitical tensions and the halt of Ukrainian transit, the Forum underscores the urgent need for Contracting Parties to transpose and implement key legal obligations – including the EU Security of Supply and Gas Storage Regulations – and to put in place necessary infrastructure and coordination measures to ensure crisis preparedness, strategic gas storage access, and resilient cross-border flows. This requires the diversification of supply sources and routes; reinforced cooperation between Contracting Parties and EU Member States.

2. Session II: Opening the Trans-Balkan Pipeline

03. Welcomes the Secretariat's study on the commercial potential of the Trans-Balkan Pipeline as a critical roadmap for unlocking regional supply diversification – particularly for Moldova and Ukraine – and calls for its findings to be translated into coordinated action to optimise this strategic corridor.
04. Identifies challenges such as high tariffs as key obstacles, and calls for action to align tariff methodologies and remove other regulatory bottlenecks to fully unlock the Trans-Balkan Pipeline's potential.
05. Welcomes the increase in reverse flow capacity between Moldova and Ukraine, supported by the Secretariat, as a concrete step toward enhanced regional integration and supply diversification.
06. Affirms the role of regulators in ensuring transparent and competitive tariffs, and fostering a commercially attractive, predictable environment for gas shippers. Emphasises that strengthened regulatory cooperation and harmonised market rules are critical to the Trans-Balkan Pipeline's role as a reliable, demand-driven corridor for Southeast Europe and beyond.

3. Session III: Integration of gas markets in the Energy Community – improvements and obstacles in regulatory frameworks

07. Recognising the enabling role of network codes in regional market integration, the Forum invites EU Member States to ensure their full implementation at all interconnection points within the Union, as well as at entry and exit points on borders with neighbouring countries.
08. Encourages Contracting Parties to enhance market integration by bundling gas transmission capacity at their mutual interconnection points, improving market efficiency and transparency.
09. Invites transmission system operators and regulators of the Contracting Parties to fully implement the Balancing Network Code, facilitating gas trading across balancing zones and contributing towards the development of market liquidity.

4. Session IV: Security and decarbonisation: greening the gas chain

10. Notes that Contracting Parties have responsibilities under the current framework, notably the Governance Regulation and NECPs, to decrease GHG emissions and scale up bioenergy. While the Methane Regulation is not part of the Energy Community legal framework, the Forum welcomes the voluntary participation of some gas sector stakeholders and the Secretariat's role in supporting these efforts. It further underscores the need to eliminate uncertainties regarding how importers can comply with the Methane Regulation, in order to safeguard security of supply for both the region and the European Union.
11. Acknowledges the importance of targeted support for Ukraine, including ongoing projects supported by the UK, to broaden the range of raw materials for biomethane production and strengthen knowledge within the agricultural sector, in particular small farmers.
12. Welcomes the role of the CESEC initiative in harmonising regional gas quality standards, recognising its potential to strengthen security of supply and lay the groundwork for the future integration of renewable gases.
13. Draws on lessons from mature biogas markets, encouraging Contracting Parties to apply them, and highlights the need for a harmonised sustainability certification framework across Europe to boost biogas production, transmission, trade, use, and integration into the gas market.