

20th Energy Community Gas Forum

Venue: Steigenberger Hotel Herrenhof, Herrengasse 10, 1010 Vienna

Date: Friday, September 19, 2025

Time:

09:00 – 09:30 Registration

09:30 – 13:00 Gas Forum, Sessions I and II

13:00 – 14:30 Lunch

14:30 – 18:00 Gas Forum, Sessions III and IV

18:00 Cocktail reception

1. Opening

Hour: 09:30 – 10:15

Welcome | Andras Hujber | DG ENER, European Commission

Keynote Speech | Marie-Therese Richter-Kuhnert | Deputy Director, Energy Community Secretariat

Setting the scene: European coordination: involving the Energy Community TSOs, essential for market development and network security | Piotr Kus | General Manager, ENTSOG

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

Hour: 10:15 – 11:30

The profound shift away from Russian gas has transformed supply routes, security priorities, and market dynamics across the Energy Community and its EU neighbours. This session will look at the new landscape created by the halt of Ukrainian transit, intensified diversification efforts, and the need for stronger North–South interconnections. The discussion will also highlight how Contracting Parties are building resilience through storage, market reforms, and implementation of EU security and emergency frameworks, while addressing the persistent regulatory and infrastructure challenges that continue to impede fully integrated, secure markets.

In this new reality, participants will learn how coordinated regional and EU efforts are essential to ensuring a secure, competitive, and more predictable gas market.

Impulse statement and moderator: Andras Hujber, EC

Debaters:

- Resilience of the European transmission system (Kacper Żeromski, ENTSOG)
- Market perspective (Doug Wood, Energy Traders of Europe)
- View from the TSO (Ferencz Szabolcs, FGSZ)

View from Ukraine and academia: Mykola Kolysnik, Ministry of Energy, and Martin Jurisek, MUNI

3. Networking coffee

Hour: 11:30 – 12:00

4. Session II: Opening the Trans-Balkan Pipeline

Hour: 12:00 – 13:00

This session will present the main findings of the recent study on unlocking the full potential of the Trans-Balkan Pipeline, carried out by the Energy Community Secretariat, supported by the European Commission and ACER. It will highlight how the pipeline—once a traditional transit route for Russian gas—can now serve as a flexible corridor for LNG and Caspian supplies, connecting Greece, Bulgaria, Romania, Moldova, Ukraine and beyond. Speakers will outline practical recommendations from the study on tariff alignment, capacity allocation, and regulatory coordination, aimed at turning the Trans-Balkan into a commercially viable part of Europe's security of supply architecture. The discussion will also address the critical role of national regulators, TSOs, and market players in moving from technical readiness to real, sustained cross-border flows.

Moderator: Predrag Grujicic, Energy Community Secretariat

Keynote presentation – Trans Balkan pipeline study and regulatory challenges | Presentation of the Energy Community Study – WECOM, Georg Fischer

Panel debate:

GTSOU (Andrii Prokofiev), Ukrtransgaz (Agneta Kutselim), Energy Traders of Europe (Doug Wood)

5. Networking lunch

Hour: 13:00 – 14:30

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

Hour: 14:30 – 15:45

In 2024, gas demand in Europe saw a moderate uptick compared to 2023, following several years of decline. While the beginning of the year saw the lowest gas wholesale prices since 2022, towards the end, prices rose. This was mainly driven by earlier-than-usual gas storage withdrawals and the anticipated end of Russian gas transit through Ukraine. The Energy Community Contracting Parties' gas markets continued to show divergent pricing trends, mostly due to their inherent supply arrangements, but also the lack of fully developed regulatory frameworks. That said, several crucial developments, such as certifications of transmission system operators and implementation of network codes, must be recognised.

The EU adopted Regulation 1789/2024 on the internal markets for renewable gas, natural gas, and hydrogen, requiring Member States to apply the network codes and guidelines to all interconnection points within the Union and entry points from and exit points to third countries from August 2026. This will allow a meaningful market integration among Contracting Parties and Member States.

This session takes stock of the current gas market developments in the EU and the Contracting Parties, focusing on the implementation of network codes and their effects on regional market integration in the



Energy Community. It will also discuss the persistent challenges in regulatory frameworks and offer potential solutions.

Impulse statement and moderator: Branislava Marsenic, Energy Community Secretariat

Debaters:

- EU market developments (Natasha Fielding, Argus)
- Energy Community market developments (Branka Tubin-Mitrovic, AERS/ECRB)
- Remaining challenges of network code implementation in the Energy Community Contracting Parties (Elena Indries, ANRE/ECRB)

7. Networking coffee

Hour: 15:45 – 16:15

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

Hour: 16:15 – 17:30

This session will explore how the region's gas sectors navigate the twin challenges of ensuring supply security while advancing decarbonisation goals. It will examine strategies to reduce methane emissions, improve gas quality standards, and integrate renewable gases – such as biomethane, and hydrogen – into existing networks. Speakers will highlight how these efforts link directly to EU climate objectives and the evolving Energy Community framework. They will also discuss the technical, regulatory, and market adaptations needed to prepare the gas infrastructure for a low-carbon future. Against the backdrop of heightened geopolitical risks, the panel will consider how balancing immediate energy security needs with long-term sustainability is becoming a central part of modern gas policy.

Impulse statement and moderator: Karolina Cegir, Energy Community Secretariat

Debaters:

- Security of supply and decarbonization, seen from the supplier' side (Simone Antonelli, Shell)
- Biomethane – a solution for gas supply security and decarbonization (Anthony Lorin, EBA)
- Support to Ukraine in decarbonation framework (Marina Delegan, British Embassy Vienna)

9. Conclusions

Hour: 17:30

10. Cocktail reception

Hour: 18:00