Moldova: Gas Infrastructure

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REPUBLIC OF MOLDOVA

- Parliamentary Republic
- Population: 3.56 million
- GDP (2010): $5.8 billion
- GDP per Capita: ~$1,631
- Currency: Moldovan Leu
  $1 = 12.00 Lei
- Area: 33.7 thous. sq. km
- Language: Romanian
- Plains and hills
- Highest level: 428 m
- Access to Danube
- Frozen conflict with a separatist region (Transnistria)
Transmission and distribution of natural gas

- TSO: JSC “Moldovagaz” (50% owned by Gazprom)
- 4 gas transmission pipelines;
- 4 compressor stations: Drochia, Tiraspol (2), Vulcanesti;
- ~18000 km gas pipelines, including cca 570 km transit pipelines
- Over 90% of localities have access to gas
- Over 40% of consumers are connected
General statistics on gas consumption and transit (2010)

- **Number of customers: 597 900**
  - Household: 588 100
  - Non-household customers: 9 800

- **Consumed volume: 1 090 mln m³**
General statistics on gas consumption and transit (2010)

Gas transit to other countries (annually):

- Capacity: ~42 bln m³
- Historical maximum: cca 25 bln m³
- Current average: cca 18 bln m³
Characteristics of gas market:
- Total daily gas demand – 3 mln mcm
- Total piped gas capacity – 122,2 mln mcm/d
- Peak demand of natural gas – 9,5 mln mcm/d
(26.01.2010)
Share of natural gas in the energy mix

- Natural gas share in the energy balance is apr. 42%
- Natural gas source – Gazprom (Russia) - 99,9% out of total gas consumption
Main challenges to gas sector

Challenges to gas supply:
- Risk of disconnection mainly political and economical (year 2006, 2009)
- High rate of wear of transportation gas pipes
- New gas sources for import
- Interconnection with Romanian gas grid

Market challenges:
- Increased price for natural gas vs alternative energy sources (fossil fuels and renewable energy sources)
Major bottlenecks of gas infrastructure

- Investigations on natural gas sources in Moldova are not performed fully
- Dependence on one source stresses the need for an alternative gas pipe source through Romania, that would allow us to:
  - use the gas storage facilities from Romania
  - Import natural gas from Romania
  - Participate in European gas projects (for ex. Nabucco)
- Increase of gas transportation safeness from Russia to EU;
- Improve of gas consumption metering and usage (energy efficient equipment).
Thank you!

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