

# The Gas Industry in the Czech Republic

**Geneva**  
**January 20<sup>th</sup> - 21<sup>st</sup> 2004**

**Josef Antos, ministerial councillor**  
**Jiri Filippi, ministerial councillor**  
**Ministry of Industry and Trade**



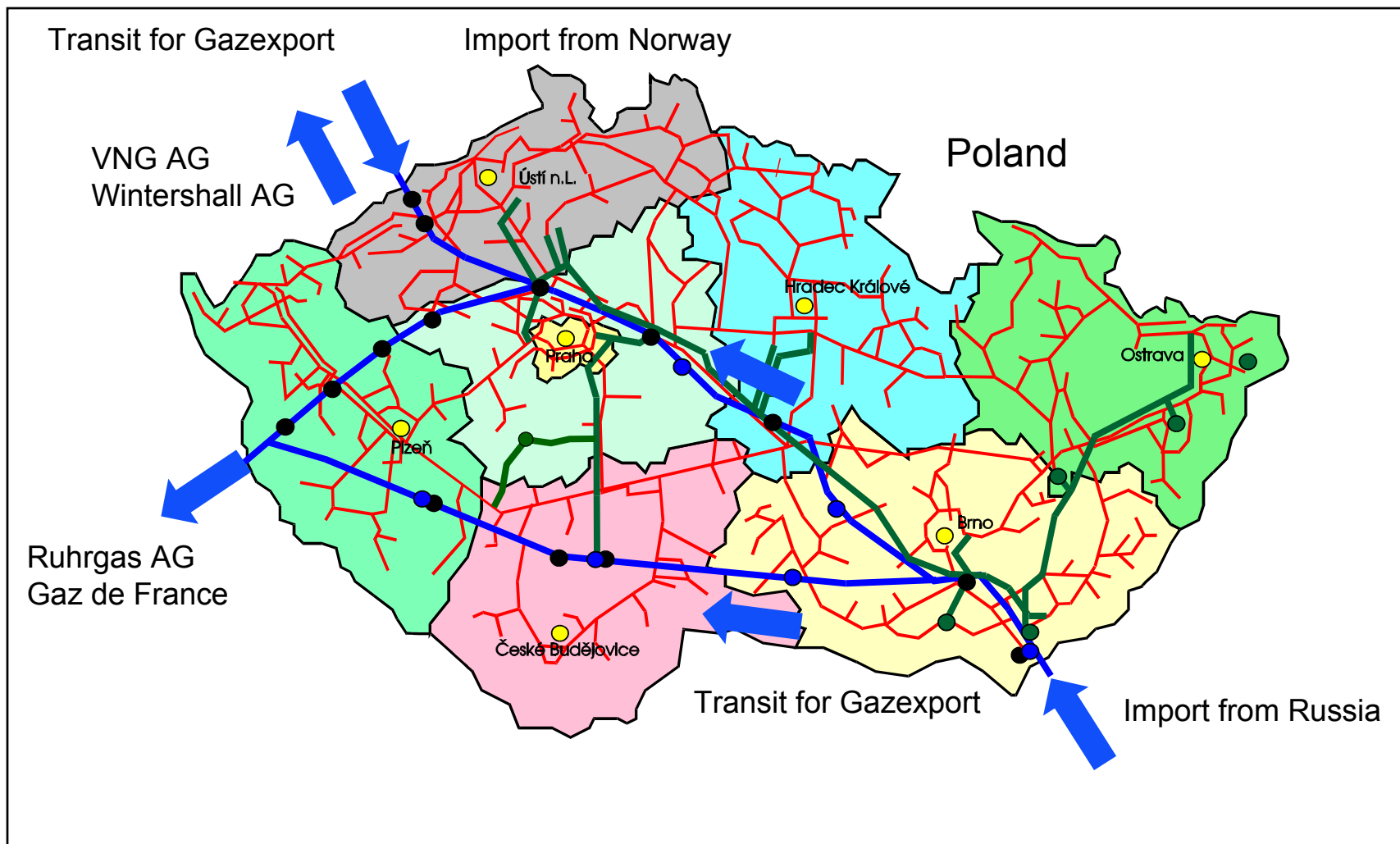
# Domestic Consumption of Primary Energy Sources in %

	1990	1995	1996	1997	1998	1999	2000	2001	2002
Brown coal and briquettes	42,9	37,8	37,4	37,7	35,9	33,2	37,0	35,0	34,3
Hard coal and Coke	21,0	18,4	17,1	16,9	15,7	16,0	16,1	15,6	14,8
Other solid fuels incl. wood	1,0	1,3	1,2	1,4	1,6	1,7	1,7	1,9	1,8
Crude oil	14,7	16,5	17,4	16,8	17,1	15,7	14,8	14,6	14,8
Oil products (incl. LPG)	2,4	2,1	1,4	0,8	1,9	4,6	4,4	5,6	5,1
Natural gas / other gases	10,9	15,7	17,3	18,4	19,4	20,0	19,1	19,5	19,8
Nuclear power	6,7	7,7	7,7	7,9	8,7	9,2	8,9	9,3	11,4
Electricity (imp./exp. bal.)	0,0	0,1	0,1	0,0	-1,0	-1,0	-3,4	-3,4	-4,1
Renewable sources	0,4	0,4	0,4	0,5	0,7	1,0	1,4	1,9	2,1

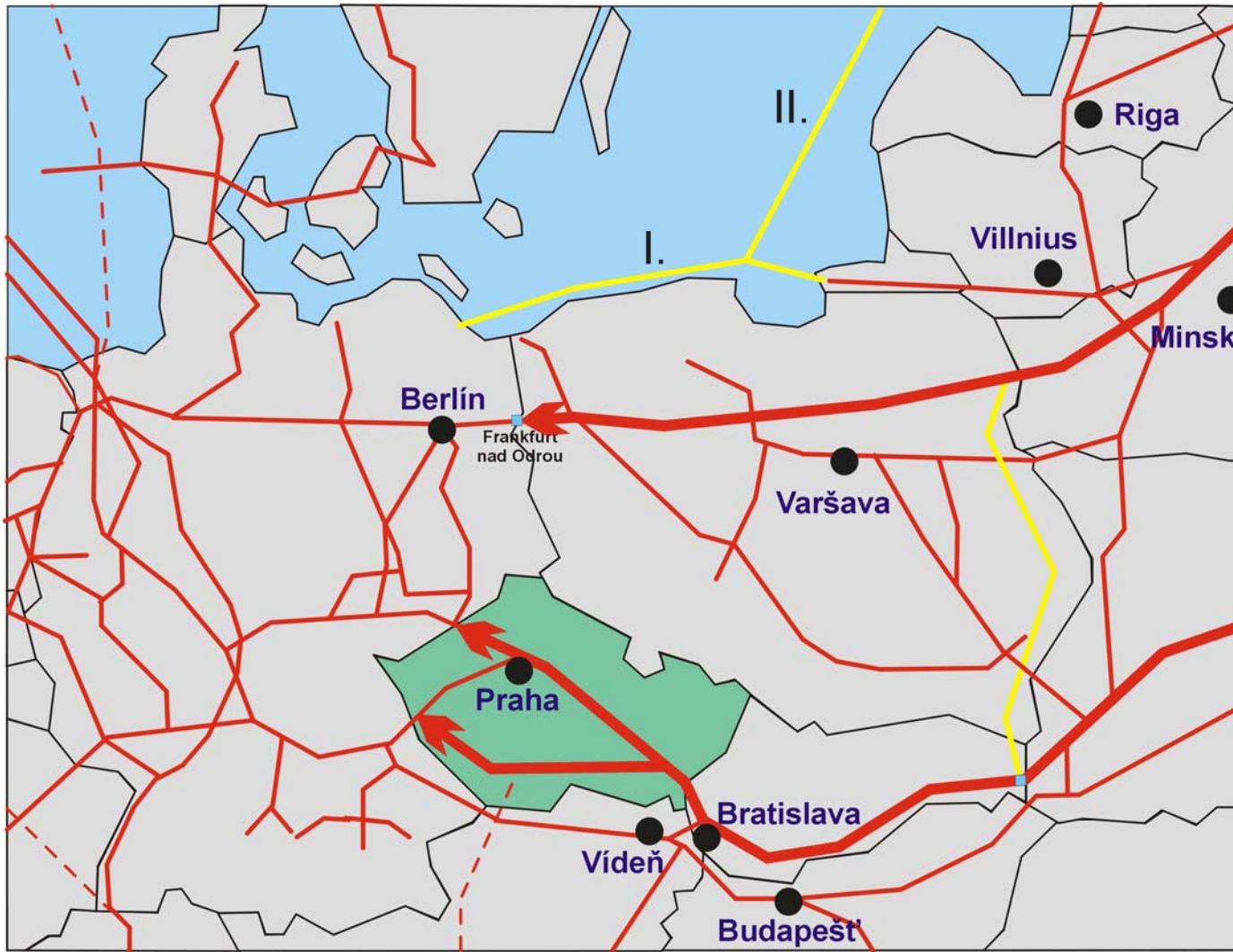
## Development of Natural Gas Consumption in the Czech Republic

Year	Average temperature in heating period	Gas consumption	Year-on-year change	
	°C	Million m <sup>3</sup>	Million m <sup>3</sup>	%
<b>1993</b>	2,7	6983,0	314,0	4,7
<b>1994</b>	3,5	6934,0	-49,0	-0,7
<b>1995</b>	3,1	8075,0	1141,0	16,4
<b>1996</b>	1,0	9306,0	1231,0	15,2
<b>1997</b>	2,3	9441,0	135,0	1,5
<b>1998</b>	3,3	9390,0	-51,0	-0,5
<b>1999</b>	3,2	9427,0	37,0	0,4
<b>2000</b>	4,8	9148,0	-279,0	-2,9
<b>2001</b>	2,9	9773,0	625,0	6,7
<b>2002</b>	3,6	9553,0	-219,0	-2,2

# The Czech Republic's Gas System



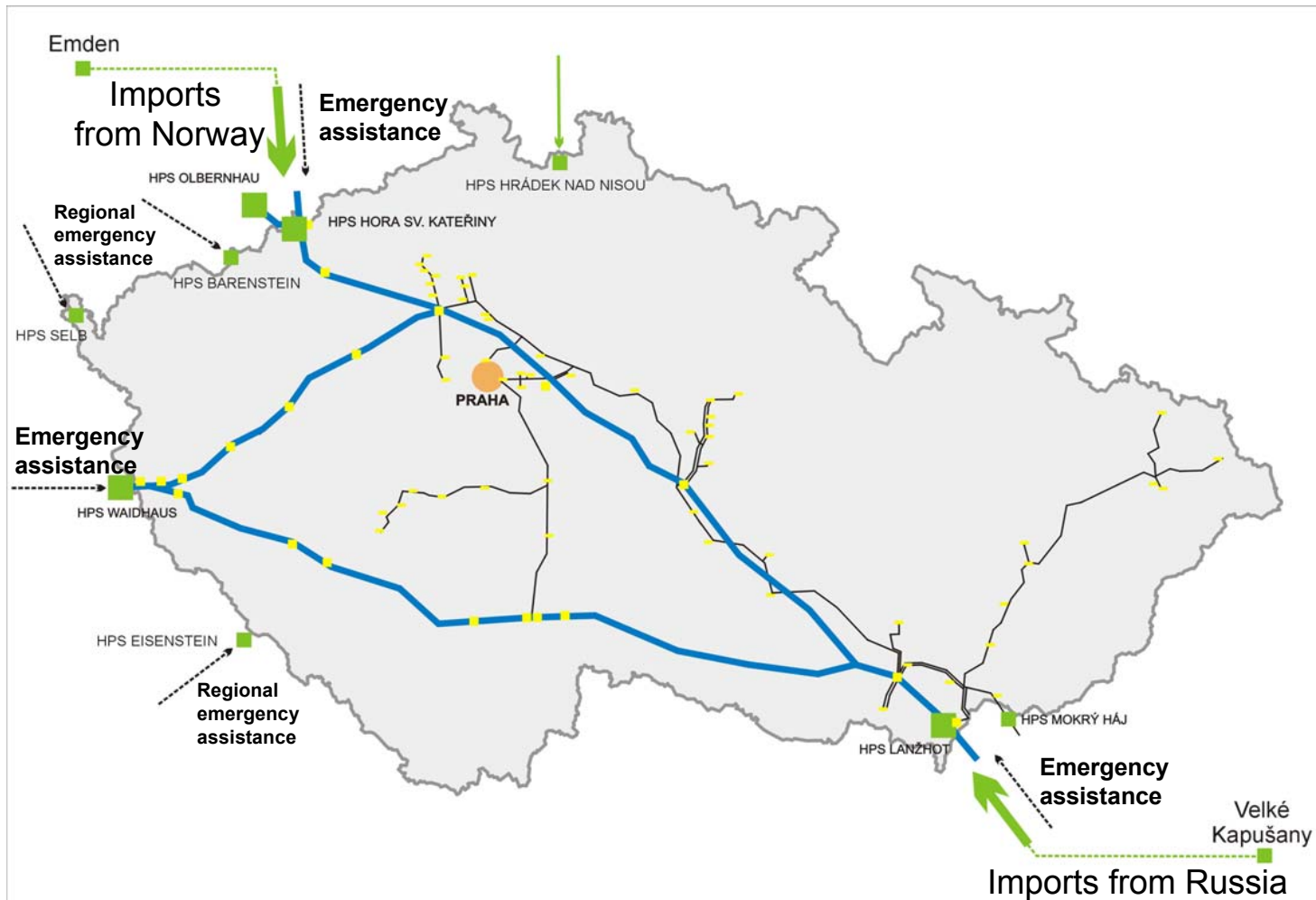
# Russia - West Europe Natural Gas Transit



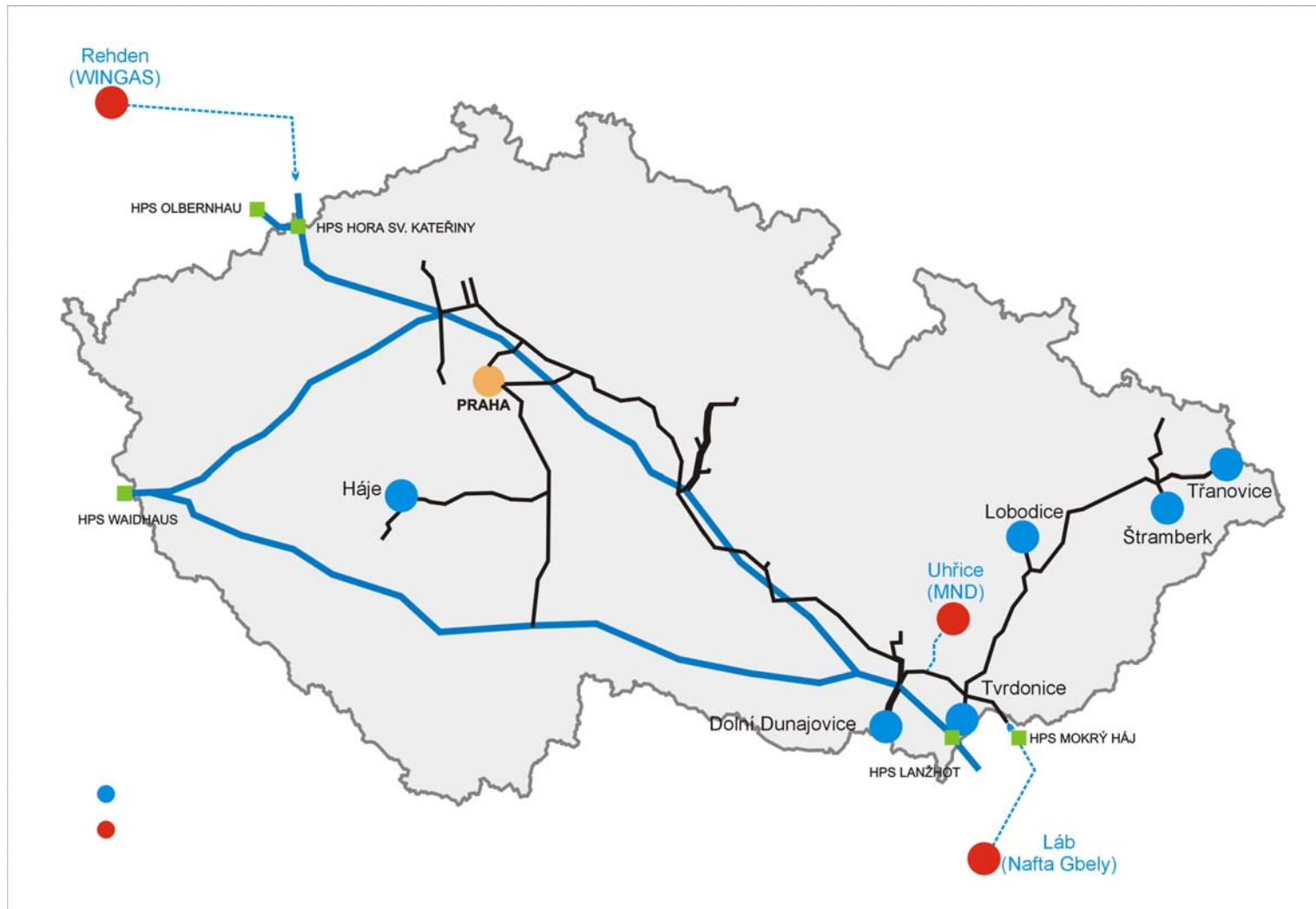
# Transit Pipelines



# Supplying the CR with Natural Gas through the Transgas System



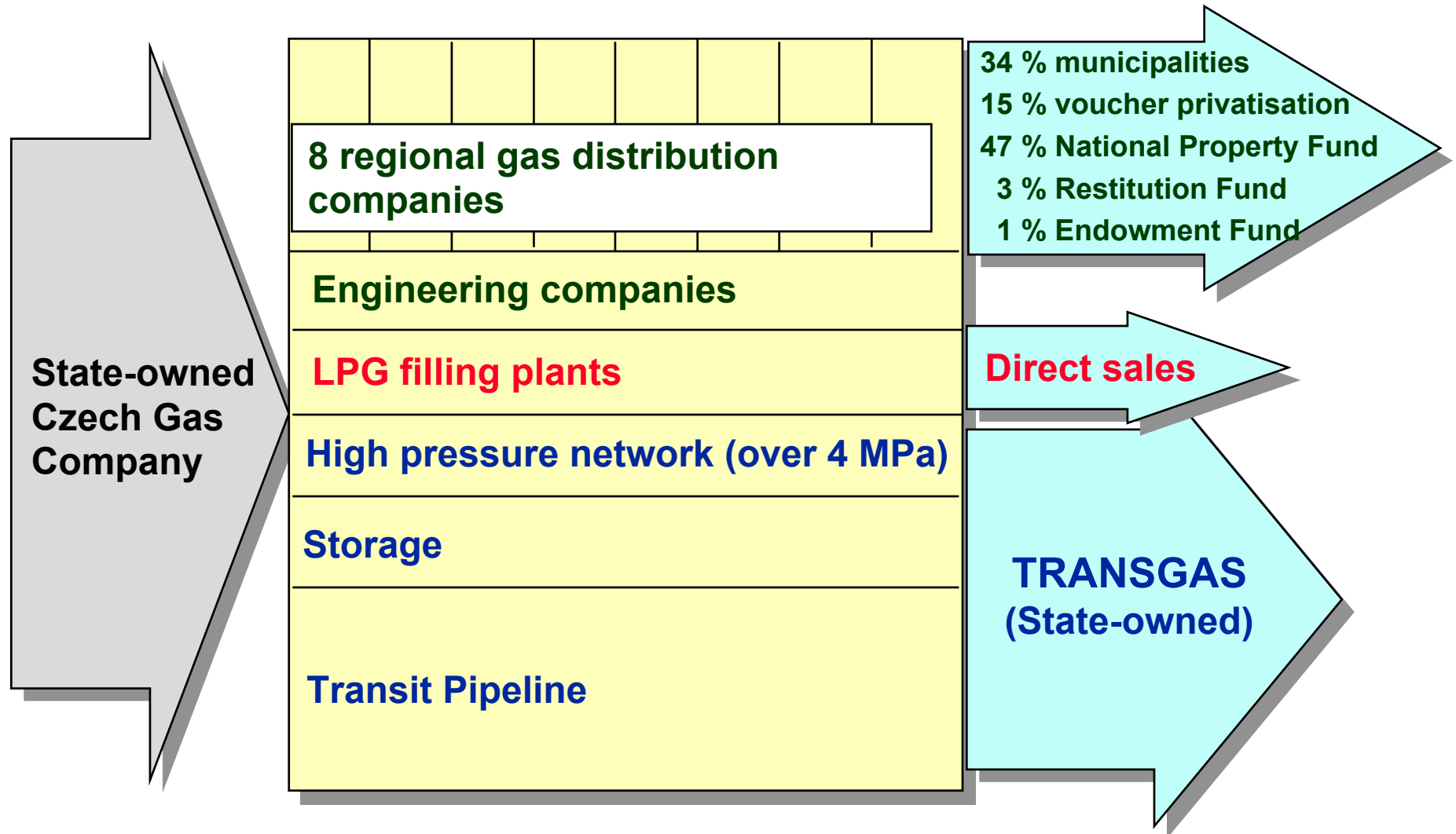
# Underground Gas Storage Facilities



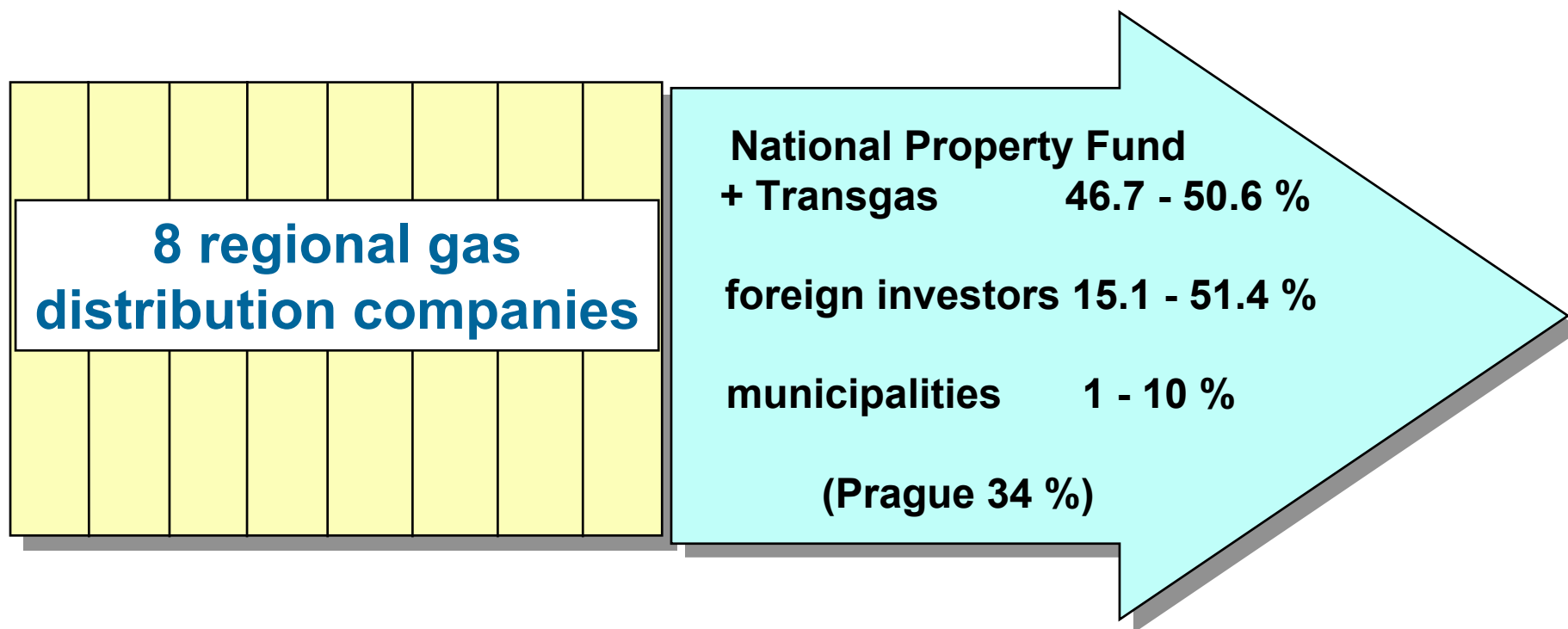
## The Czech Underground Storage Facilities

Gas storage facility	Operating since	Active filling - million m <sup>3</sup>
<i>Lobodice</i>	1965	150
<i>Tvrdonice</i>	1973	450
<i>Štramberk</i>	1983	420
<i>Dolní Dunajovice</i>	1988	700
<i>Háje</i>	1998	60
<i>Dolní Bojanovice</i>	2000	576
<i>Třanovice</i>	2001	245
<i>Uhřice</i>	2001	180

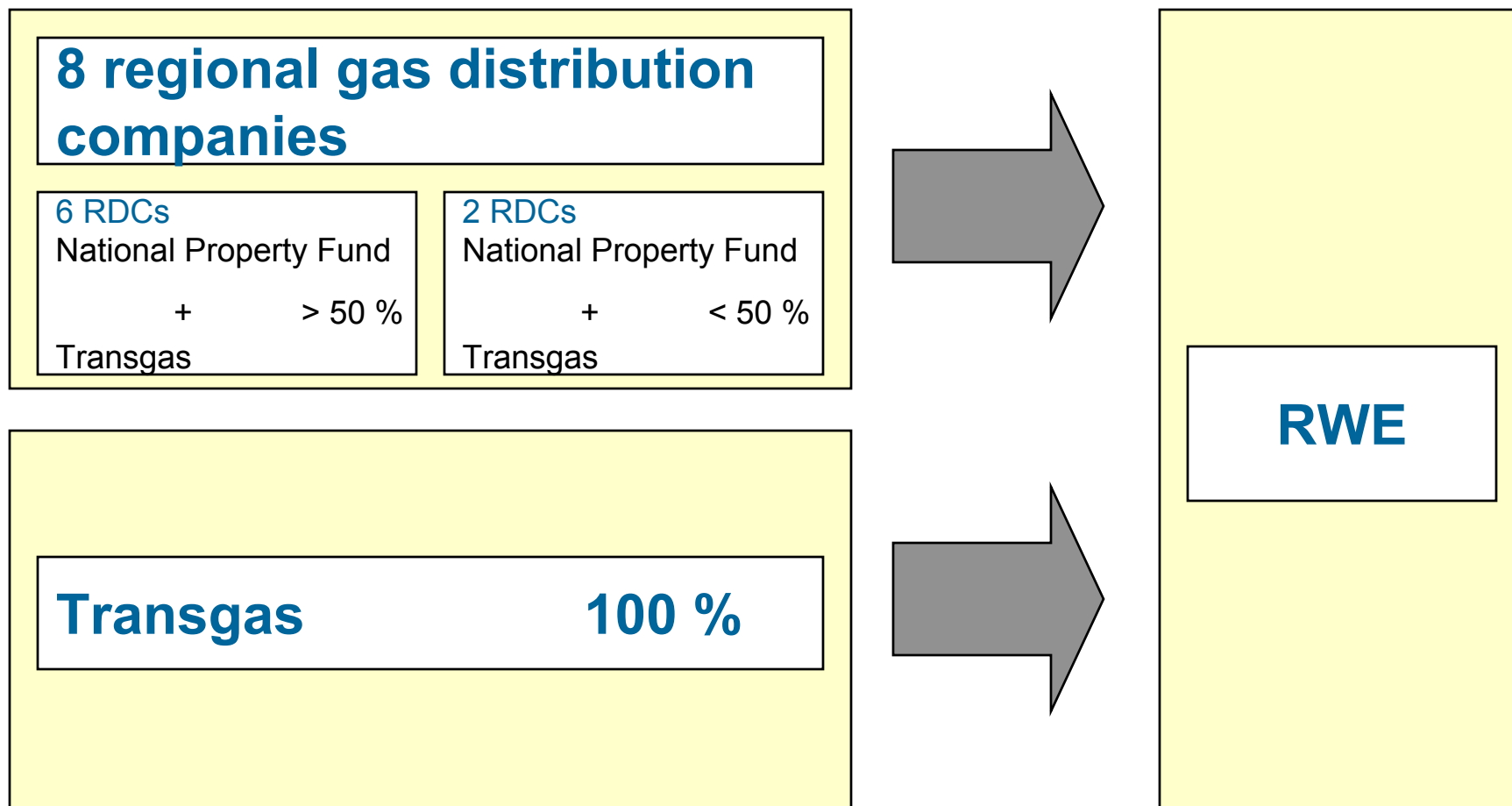
# Privatisation of the Czech Gas Industry (1994 - 1995)



# Privatisation of the Czech Gas Industry (1996 - 2000)



# Privatisation of the Czech Gas Industry (2001 - 2003)



- **Principles of Directive 98/30 EC**
- **Separate accounting for each licensed activity**
- **TPA to the transmission and distribution systems and underground gas storage facilities**
- **Eligible customers, protected customers**
- **Energy Regulatory Office: Competencies & Licenses**

- **The Regulator – the market model and gas market rules**
- **The Ministry – the Energy Act (drafting and amendment)**
- **Implementation of principles of the Directive 2003/55/EC from 26<sup>th</sup> June 2003**

## **The Energy Act (amendment)**



- **DEADLINE – year 2004**
- **Unbundling of the TSO and DSO's - 31.12.2004**
- **Gas Market opening – min 28% - 1.1.2005**
- **Gas market opening – 100% - 1.1.2007**

**Ladies and Gentlemen  
thank you for your  
attention.**

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