



## Call for proposals: Study on the Current and Future Development of the Gas Market in the Western Balkans

Individual experts are kindly invited to submit proposals for a survey report examining the current and the potential development of the gas market in the Western Balkan region.

### 1. Background

The Balkan Energy School (BES) is an Association of energy regulators. The participation in the Association is reserved for the Energy Regulatory authorities operating within the Euro-Balkan Region. Current members include the energy regulatory authorities of Albania (ERE), Bosnia and Herzegovina (SERC), Greece (RAAEY), Italy (ARERA), Kosovo\*<sup>1</sup> (ERO), Montenegro (REGAGEN), and North Macedonia (ERC). The energy regulatory authority of Serbia (AERS) participates as an observer. BES aims to promote debate and knowledge exchange in the energy sector. The Association is dedicated to training, capacity building, knowledge transfer and effective communication among regulatory professionals. Furthermore, it focuses on the development, regulation, and integration of energy markets in the Euro-Balkan region, with particular attention to the implications of the energy transition. To achieve its mission BES organizes a wide range of activities including courses, seminars, conferences, study visits, and other educational or informational events. The Association publishes analyses, studies and research, publications and public presentations of customised policy papers on energy and related topics. It also elaborates regulatory policy recommendations to foster the development and integration of energy markets in the Euro-Balkan region.

### 2. Context of the study

The natural gas market in the Western Balkans remains underdeveloped, fragmented, and highly dependent on imports. Gas consumption across the region is relatively low, with some countries (e.g. Albania and Montenegro) having minimal or no functional gas infrastructure or demand.

At the same time, the region is undergoing a phase of infrastructure expansion and diversification, including new interconnectors and access to LNG and Caspian gas sources. However, this development rises strategic questions regarding energy security and diversification, economic viability, alignment with EU decarbonization goals and risks of long-term fossil fuel lock-in.

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<sup>1</sup> This designation is without prejudice to positions on status, and is in line with UN Security Council Resolution 1244 and the ICJ Opinion on the Kosovo declaration of independence.

The expected output will be a comprehensive, evidence-based assessment of the current status and future development pathways of the gas market in the target countries.

### 3. Objectives of the study

The selected contractor will:

1. Identify Key Risks and Structural Challenges
  - a. Identify and interpret the main risks affecting gas market development, including:
  - b. supply concentration and geopolitical exposure
  - c. infrastructure limitations and fragmentation
  - d. investment uncertainty
  - e. consistency with energy transition and decarbonisation objectives
2. Analyse regulatory and institutional frameworks, including:
  - a. Market liberalisation and unbundling
  - b. Alignment with EU and Energy Community obligations
  - c. Pricing mechanisms and tariff structures
3. Evaluate regional integration and infrastructure development, including:
  - a. Existing and planned interconnectors
  - b. Access to LNG and alternative supply routes
  - c. Role of transit corridors (e.g. TAP and regional pipelines)
  - d. Compatibility with energy transition and climate policies
4. Describe forward-looking scenarios for gas market evolution up to 2030/2040 based on relevant documents released by the other institutions and organization at national or international level Energy Community, ENTSOG, IEA, European Commission:
  - a. Demand projections (by sector), using the more recent sources
  - b. Infrastructure expansion scenarios
  - c. Role of gas in power generation and heating
  - d. Interaction with renewable energy deployment
5. Provide policy and investment recommendations:
  - a. Priority infrastructure investments
  - b. Market reforms and regulatory improvements
  - c. Regional cooperation mechanisms
  - d. Alignment with EU Green Deal and decarbonisation pathways

### 4. Scope of the study

The study will cover the Western Balkans Region.

## 5. Expected Outputs (Didactic Focus)

To maximise usefulness for regulatory authorities, the study shall include:

- Key Indicators Dashboard: a structured set of core indicators for monitoring gas market development
- Analytical Framework: a concise explanation of how key variables interact and how indicators should be interpreted
- Key Takeaways for Regulators: a synthesis of main insights and relevant policy trade-offs

## 6. Recommendations

The study shall provide **targeted and concise recommendations**, clearly linked to the analysis, and limited to:

- regulatory priorities
- areas requiring further monitoring or analysis

## 6. Submission requirements and scoring system

Applicants must submit:

1. Technical proposal (including methodology and work plan)
2. Team composition and CVs
3. References for similar assignments

Proposals will be evaluated based on the following scoring metrics:

1. Technical quality and methodology (40%)
2. Relevant experience and team composition (30%)
3. Understanding of regional context (30%)

## 7. Submission of proposals

Proposals must be submitted to the BES Secretariat at the following email addresses: [info@balkanenergyschool.org](mailto:info@balkanenergyschool.org) and [webcom@balkanenergyschool.org](mailto:webcom@balkanenergyschool.org) by **10<sup>th</sup> July 2026**. Considering that the study will be included within the Know Exchange Programme Project co-financing by Central European Initiative titled “EU Natural gas markets: fundamentals, regulatory frameworks and challenges for market integration and decarbonisation”, only proposals submitted



by countries members of the Organization will be considered as eligible  
<https://www.cei.int/member-states>

## 8. Budget

The budget available for the study is € 5,000, VAT and TAX included, non-negotiable.

## 9. Deliverables and deadline

The Report on the Current and Future Development of the Gas Market in the Western Balkans shall be delivered to the BES Secretariat in English by the 31<sup>st</sup> October 2026.