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The Western Balkans Infrastructure Gateway

Albania, Kosovo, North Macedonia, Montenegro and Bosnia & Herzegovina

Strategic Energy Investment Report

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Albania hosts TAP but receives no gas from it

215 km

of TAP cross Albania onshore

0 bcm

of TAP gas reaches Albania; the Vlora TPP has never received TAP gas

No gas

Kosovo has no access to natural gas and relies on lignite power

The missing link of the Southern Gas Corridor. The Ionian Adriatic Pipeline (IAP) and the gas component of Corridor VIII remain unbuilt, so NATO members and partners in the region lack the gasification needed for energy independence.

A documented pattern sidelines Corridor VIII and the IAP

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15 May 2026 · Athens

The energy ministers of Greece, Serbia, North Macedonia and Bulgaria advance the Vertical Corridor. Albania and Kosovo are not invited.

22 Sep 2026 · Vienna

At the 21st Energy Community Gas Forum, the Greek representative states that the Balkan Vertical Corridor was originally a Gazprom project.*

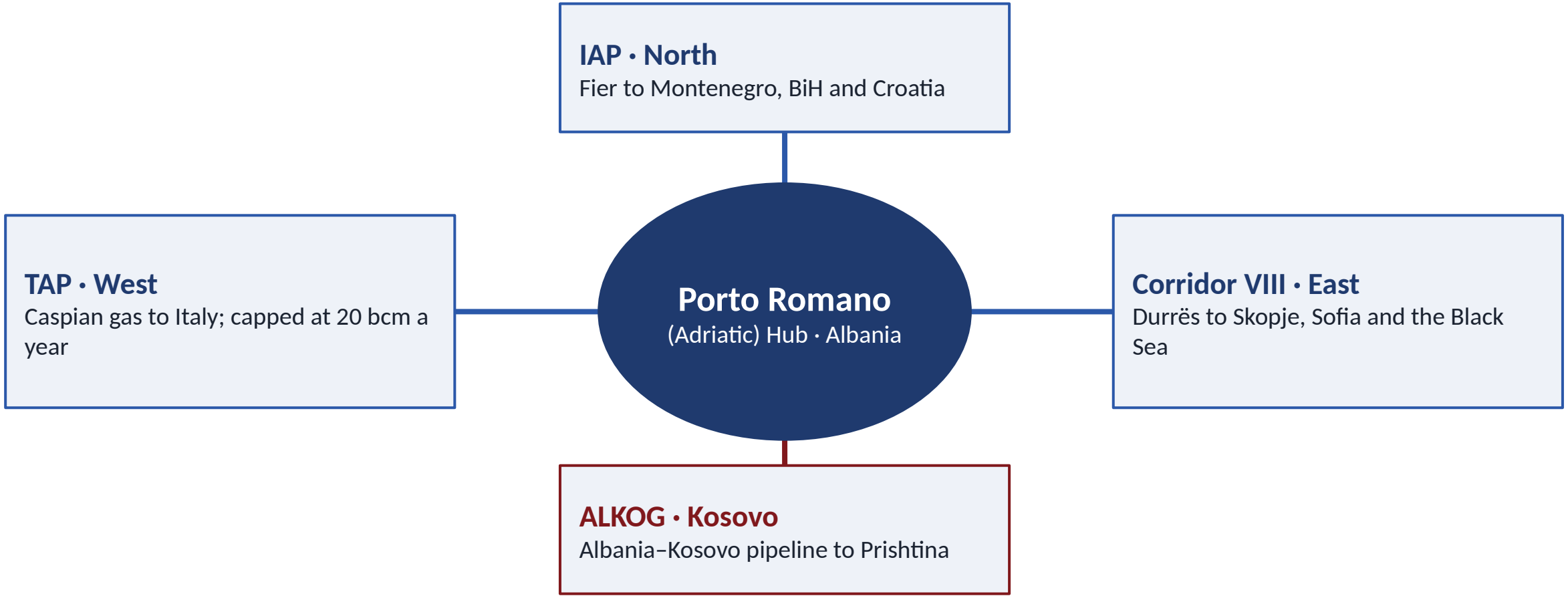
Forum conclusions

Progress on the Trans-Balkan Pipeline, built to carry Russian gas, is welcomed. The IAP and Corridor VIII are not mentioned; no IAP country is on the programme.

Whatever the intent, the effect has been to keep Albania, Kosovo and Montenegro outside the region's gas architecture.

** As recorded by IA-SEE, which followed the Forum online. Sources: Energy Community, Conclusions of the 21st Gas Forum, 22 September 2026.*

Albania is where the three corridors meet



TAP is capped at 20 bcm; TAP II is the only way to grow flows to Italy

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10–12

bcm a year

TAP throughput today

20

bcm a year

TAP maximum, with the additional compressor station it still needs

~40

bcm a year

towards Italy with TAP II from Porto Romano

Why: TAP's existing pipe diameter limits it to 20 bcm a year. TAP II, a hydrogen-ready, bidirectional Adriatic link from Porto Romano to Bari/Brindisi, is developed gradually with the hub, adding up to 20 bcm a year, with scope for the hub to grow further later.

A single Caspian source has a Russian dimension

The Russian dimension

- Lukoil holds 19.99% of Shah Deniz, the field that supplies TAP, after buying a further 9.99% from Petronas in February 2022
- The United States sanctioned Lukoil in October 2025; whether the Shah Deniz stake is part of its asset sale has not been reported
- Gazprom supplied Azerbaijan with up to 1 bcm of Russian gas from November 2022 to March 2023

The Adriatic answer

- An onshore LNG entry independent of any single pipeline source
- U.S. LNG from major suppliers such as ExxonMobil, Chevron, Shell, TotalEnergies and Cheniere Energy
- Qatari and other LNG alongside Caspian gas, not instead of it

Sources: Natural Gas World (2022); Gazprom press release (Nov 2022); U.S. Treasury OFAC (22 Oct 2025); S&P Global; RBC-Ukraine (3 Nov 2026).

Porto Romano (Adriatic) Hub: built to scale with demand

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1 → 20

bcm a year, in steps over 20 years, in line with regional gasification

€10–12bn

investment estimate for the full hydrogen-ready build-out to 20 bcm a year

Onshore

hydrogen-ready by design; no floating terminal in Vlora Bay next to the Sazan military area

Promoted by IA-SEE GmbH as a national strategic project of Albania, not a stand-alone commercial terminal.

What the gateway delivers to each country

Albania

A domestic supply point, LNG entry and the volumes that make the IAP and Corridor VIII interconnectors bankable

Kosovo

ALKOG ends gas isolation and offers an alternative to lignite-fired Kosovo A and B; onward link to North Macedonia

North Macedonia

Corridor VIII axis; KOSMAK interconnector (400–800 mcm a year) fed from Albania through ALKOG

Montenegro and BiH

The IAP is the only viable path to large-scale gasification, continuing north to Croatia

Bankable through anchor loads and a transatlantic consortium

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Gas-to-power first

Pipelines need anchor loads to be bankable, and power plants need guaranteed supply. Combined-cycle gas plants (CCGT) break that circle and justify the new interconnectors.

Infrastructure & development	Sempra Infrastructure
Engineering & construction	Bechtel
Strategic investors	ExxonMobil, Shell, TotalEnergies
Financing & guarantees	DFC, EXIM Bank, EBRD, EIB

A Public-Private Partnership spreads risk without overextending national budgets, while utilities keep their strategic stake.

Governance: ending the cost of passive transit

$80–100m

a year in transit fees Albania does not collect

$400–500m

forgone over the last five years

$160m

Vlora TPP, which operated for only three days

An architecture of accountability

- Binding citizen-initiated referenda on major energy decisions
- Constitutional recall of abusive leaders
- Mandatory fiscal transparency for all strategic infrastructure procurement

Complete the Western Balkans Gas Ring

1

Put the IAP, Corridor VIII and ALKOG back on the Energy Community and EU agenda

2

Recognise the Porto Romano (Adriatic) Hub as Albania's strategic entry point for U.S. and other LNG

3

Develop TAP II with the hub, lifting capacity towards Italy to around 40 bcm a year

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