

Strategic Communication in Energy Sector in Slovakia

Veronika Oravcová¹

Summary

This report focuses on the strategic communication in energy sector in Slovakia, with particular focus on natural gas sector. The first part provides general overview of the whole energy sector and the main energy providers. It provides an overview by examining individual energy sources and their role in energy mix of the country. The second part examines the strategic communication by focusing on natural gas sector, as it is the crucial part of the energy security discourse since 2009 crises. It analyses the communication based on interviews, but focuses also on official documents of the ministries and institutions or organizations in the Slovak energy sector. The third part provides recommendations for communication in energy sector of Slovakia by focusing on the role of non-governmental organizations in the process.

Energy sector in Slovakia

The responsibility for the policies in energy sector lies primarily upon three ministries: Ministry of Economy that sets legal framework and develops strategic documents in energy policy² including National Energy and Climate Plan covering all five dimensions of the energy union³, Ministry of Environment responsible for environmental and climate protection policies⁴ and Ministry of Transport and Construction focusing on policies in transport and building sector that includes primarily energy efficiency⁵.

For Slovakia, the issue of energy security has been an important issue in the past decade after experiencing total interruption of natural gas supplies in 2009. Since then the situation in the energy sector changed a lot and progress has been made thanks to diversification of infrastructure in oil and natural gas sectors. Energy security (security of supplies) remains an important topic, even though the policies of energy transition (e.g. fair transition of coal region) and decarbonisation (e.g. penetration of renewables) are gaining more and more attention of politicians⁶ and society.

Energy sector of Slovakia relies heavily on nuclear power, which is the largest part of the total primary energy supply. Nuclear energy also accounts for more than 60 percent of the total energy production (Figure 1). Domestic production of nuclear energy helps to improve energy security of the country, even if the fuel is imported from Russian federation. Domestic production of oil and natural gas are negligible and the country imports these sources through Druzhba and Brotherhood pipelines. Slovakia is transit country as well and the question on future transit remains very vivid due to building new gas infrastructure Nord Stream 2, but also the end of the contract between Gazprom and Naftogaz at the end of the year. Regarding

¹ Associate Fellow, Slovak Foreign Policy Association. I would like to acknowledge research support of Samuel Goda who did empirical research (interviews) in Slovakia

² Ministry of Economy of the Slovak Republic: <https://www.economy.gov.sk/en/ministry/about-ministry>

³ European Commission: <https://ec.europa.eu/energy/en/topics/energy-strategy-and-energy-union/governance-energy-union/national-energy-climate-plans>

⁴ Ministry of Environment of the Slovak Republic: <http://www.minzp.sk/en/about-us/ministry-environment/ministry-environment-sr.html>

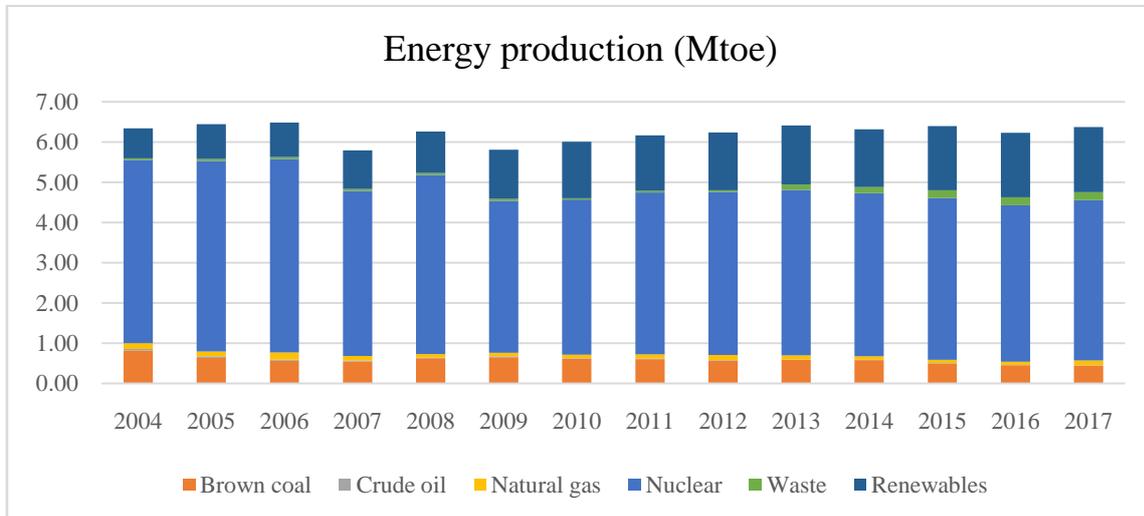
⁵ Ministry of Transport and Construction of the Slovak Republic: <https://www.mindop.sk/en>

⁶ O cieľi pre obnoviteľné zdroje chce Žiga s Komisiou ešte diskutovať:

<https://euractiv.sk/section/energetika/news/o-cieli-pre-obnovitelne-zdroje-chce-ziga-s-komisiou-este-diskutovat/> (24.06.2019)

the penetration of the renewables, these are dominated mainly by biomass and hydro production. Politically sensitive topic is also the production and use of coal. Domestic production of brown coal does not cover the consumption and the deficit is covered primarily by imports from Czechia.

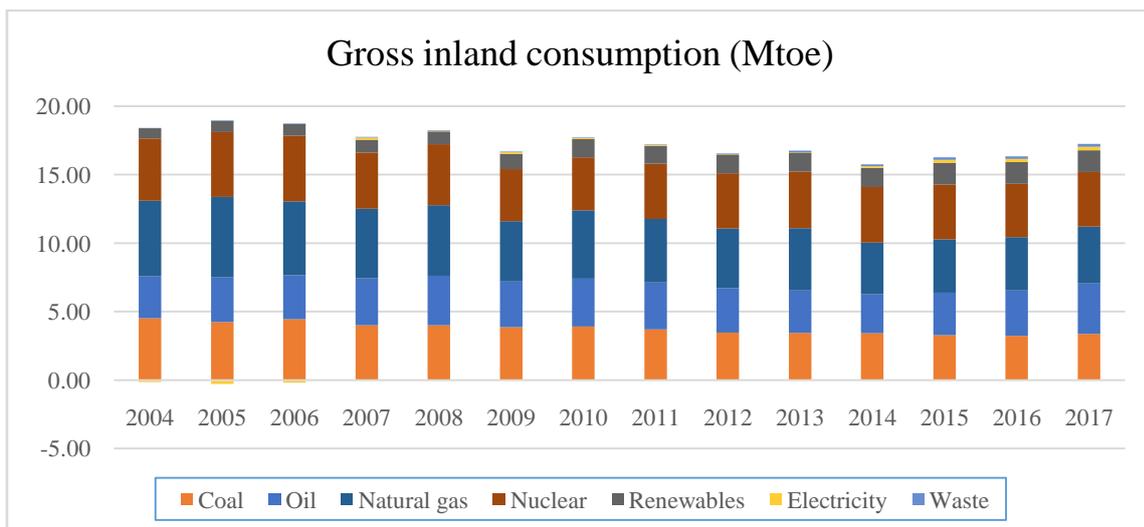
Figure 1. Domestic energy production



Source: European Commission⁷, author

Since the of Slovakia accession to the EU gross inland energy consumption ranged between 15,76 Mtoe (millions of tonnes of oil equivalent) in 2014 and 18,7 Mtoe in 2005. The average is around 17 Mtoe (Figure 2). The largest amount is consumed by industry, followed by transport, household sector, services and finally agriculture. While energy consumption in transport sector has been increasing, the consumption in household sector has been decreasing⁸.

Figure 2. Gross inland energy consumption



Source: European Commission, author

⁷ All graphs are based on the European Commission data “EU energy statistical pocketbook and country datasheets”: <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>

⁸ Energy Policy of the Slovak Republic: <https://www.economy.gov.sk/uploads/files/47NgRIPQ.pdf> (for more details see page 16)

Looking at the overall evaluation of energy sector, International Energy Agency identified energy security and energy efficiency as the main improvements in energy sector over past years⁹. The issue of energy security tackles security of supplies that resulted into diversification of sources by the improvement of the infrastructure, especially in gas and oil sector. However, not only new cross-border interconnections, but also increase of existing generation capacities in electricity contribute to increase energy security as well. Within the area of energy efficiency, the biggest progress has been made in home renovation by insulation of buildings. There are also several challenges that Slovakia has to deal with: decarbonisation in heat sector and transport and deregulation of electricity prices.

Electricity

Electricity generation is largely dominated by nuclear power and it is expected that after commissioning two more units in Mochovce (each 470 MW) more than 80 percent of all generated electricity will be based on nuclear or renewables. The share of fossil fuels in electricity remains low (around 15 percent).

Market coupling is a condition for single electricity market and it ensures efficient use of cross – border connections. Since 2014 Slovakia is coupled with three countries: Czechia, Hungary and Romania. So called 4M Market Coupling (4M MC) has integrated the markets of OTE in Czech Republic, HUPX in Hungary, OPCOM in Romania and OKTE in Slovakia¹⁰. When it comes to cross-border interconnections, there is a lack of available transmission capacity on the Slovak–Hungarian border and there are projects aiming its increase¹¹.

Slovak transmission system operator is *Slovenská elektrizačná prenosová sústava, a.s. (SEPS)* with the main responsibilities to operate, maintain, balance, renew and develop the system in the country, but also to ensure transmission operation with neighbouring countries. The company ensures the electricity transmission to the distribution network and major customers connected to the 220 kV and 400 kV grids¹² with the total length of line route 2.428.439 km in 2018¹³. Distribution losses fall below one percent.

The biggest provider of electricity in Slovakia is company *Slovenské elektrárne* that operates on 69 percent of the generation market of the country. The company is also the main supplier to the largest three regional distribution companies that are controlled by the state (51 percent share): ZSE (operating at Western Slovakia), SSE (operating at central Slovakia), and VSE (operating at Eastern Slovakia). In total, there are 193 electricity suppliers, as the market was liberalised after third liberalisation package.¹⁴ When it comes to prices regulation (electricity prices are regulated for households and small enterprises), the main problem is the coal subsidy that is one of the component of electricity bills¹⁵.

Nuclear power

Slovakia has the second highest share of the nuclear energy in electricity generation (accounting for 54 percent) within the European Union (after France). Nuclear energy is thus basic pillar of energy grids. The country has two nuclear power plants: one in Mochovce, the second in Jaslovské Bohunice. Whereas the former has to commission two more units, the

⁹ Energy Policies of IEA countries: Slovak Republic review 2018, p. 11-16

¹⁰ 4M Market Coupling launches successfully by using PCR solution: <http://www.ote-cr.cz/o-spolocnosti/files-novinky/pcr-pr-4m-mc-launch.pdf>

¹¹ Projects of Common Interest: <https://ec.europa.eu/energy/en/topics/infrastructure/projects-common-interest>

¹² Slovenská elektrizačná prenosová sústava: https://www.sepsas.sk/en_ProfilZaklUdaje.asp?Kod=99

¹³ Slovenská elektrizačná prenosová sústava: <https://www.sepsas.sk/TechnickeUdaje.asp?kod=16>

¹⁴ Energy Policies of IEA countries: Slovak Republic review 2018, p. 72

¹⁵ Úrad pre reguláciu sieťových odvetví: <http://www.urso.gov.sk/?q=node/153>

latter shut down units A1 and V1 in 2006 and 2008 due to condition for the EU accession. Construction of Mochovce 3 and 4 units is the largest private investment in the history of Slovakia¹⁶. Reactors shall be put in operation in 2019 and 2020, respectively, but these deadlines have been already postponed several times and there have been substantial delays.

All four units feature pressurised water reactors (VVER 440 type) and are operated by *Slovenské elektrárne*. Installed capacity of reactors in Mochovce is 470 MW for each, in Bohunice the unit V2 was increased to 505 MW¹⁷. Currently there are no storage facilities for the final disposal of spent fuel. Nuclear decommissioning and spent fuel management is responsibility of state owned company *Jadrová a vyrad'ovacia spoločnosť - JAVYS*¹⁸.

Renewables

Figure 3 shows that production of renewable energy in Slovakia doubled since 2004. In 2017 it reached almost 1.6 million tonnes of oil equivalent. However, the share of the renewables has been decreasing over last three years even if their increase is considered one of the priorities of the government¹⁹. Slovak energy mix is still dominated by nuclear energy which will even increase in future after two blocks in Mochovce will be finished. Looking at the energy production from renewable sources, there is clear domination by solid biofuels production that account for more than half of the overall RES production, followed by hydro energy (Figure 3).

Biomass has the biggest potential in the country mainly within the sector of heating where it is competitive with natural gas in some cases²⁰. However, use of biomass often contradicts forest protection and management²¹. The country has poor performance in utilization of biodegradable waste for energy purposes which would improve the situation also with disposal in landfills.

The largest hydroelectric power plant is Gabčíkovo built at Danube River at the borders with Hungary. Its installed capacity is 720 MW and average annual generation is 2.200 GWh. In 2015 its operation has been taken over by *Vodohospodárska výstavba*, which is fully state owned company²². Gabčíkovo represents 30 percent of installed capacities of Slovak hydro power plants²³. Hydropower is aptly for Slovak conditions as it can add to the system flexibility.

The country is still lagging behind in solar and wind energy. There is almost no wind energy production (there are just few wind turbines) and this is not likely to change in future, because of strict environmental protection rules such as bird sanctuaries. More potential of the country lies in geothermal energy, especially for heating sector. The largest boom of solar PV installations was during 2009 – 2011 with more than 500 MW of total installed capacity²⁴. However, since then the government changed the rules for installations and limited maximum capacity due to problems with grid balancing. Currently the government subsidizes decentralised solar power generation on buildings limited to 10 kW capacity²⁵.

¹⁶ Slovenské elektrárne: <https://www.seas.sk/mochovce-3-4-npp>

¹⁷ Slovenské elektrárne: <https://www.seas.sk/bohunice-nuclear-power-plant>

¹⁸ JAVYS Strategy: <https://www.javys.sk/en/about-the-company/company-profile/strategy>

¹⁹ Energy Policy of the Slovak Republic: <https://www.economy.gov.sk/uploads/files/47NgRIPQ.pdf>

²⁰ Ibid.

²¹ Biomaker: <https://biomasaker.wolf.sk/>

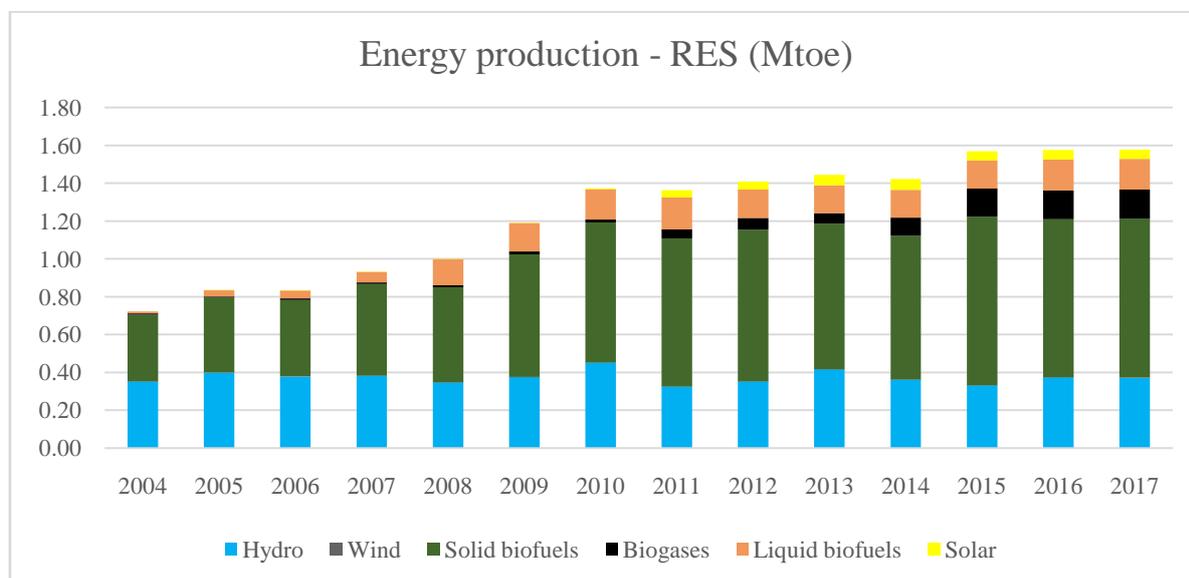
²² Slovenské elektrárne: <https://www.seas.sk/gabcikovo-hpp>

²³ Vodohospodárska výstavba: <http://www.vvb.sk/cms/index.php?page=svd-gabcikovo-nagymaros>

²⁴ Slovenská asociácia fotovoltického priemyslu a OZE: <https://www.sapi.sk/fotovoltika-na-slovensku>

²⁵ Zelená domácnostiam: <https://zelenadomacnostiam.sk/sk/domacnosti/podporovane-zariadenia/fotovolticke-panely/>

Figure 3. Energy production of renewable sources



Source: European Commission, author

Oil

The oil pipeline system in Slovakia is operated by company *Transpetrol, a.s.* ensuring transit, storage and domestic transportation of crude oil. The company is state owned by the Ministry of Economy. Transport of crude oil is secured by Družba pipeline from Russian federation and going through Belarus, Ukraine, and Slovakia to Czechia. The pipeline system in Slovak territory has the total length 1032 km²⁶ and its transport capacity is 20 million metric tons per year²⁷. There are five pumping stations: Budkovce located on Slovak – Ukrainian border, Moldava nad Bodvou, Rimavská Sobota, Šahy and Bučany.

Oil imported from Russian federation is crucial for Slovakia and is consumed mainly by transport sector and industry as well. However, there were efforts of possible diversification of routes. Therefore Družba pipeline is connected to Adria oil pipeline ending at Croatian port of Omišalj. The pipeline leads from Šahy to Hungary where it is connected to Adria. Currently its capacity amounts for 3.8 million tons per year²⁸.

In Slovakia there is only one refinery that is based right in capital city Bratislava. Company *Slovnaft, a.s.* has been part of MOL Group since 2004 and has an annual processing capacity of 5.5 - 6 million tonnes of crude oil²⁹. The refinery produces a range of products, mainly motor fuels, for domestic consumption and for export to neighbouring countries (especially Czechia). In 2017 Transpetrol a. s. transported a total 9.582.252 tons of crude oil and the major part was transported to Slovnaft refinery. The transportation to this company in

²⁶ The length of the pipelines is about 510 km, but these are doubled in the most of the territory.

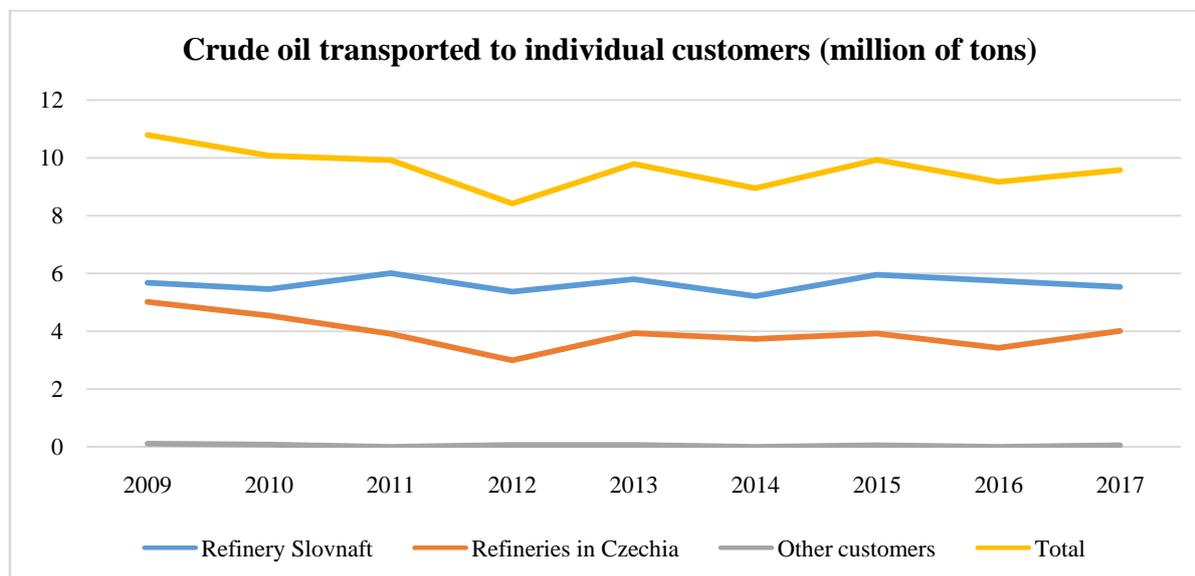
²⁷ Transpetrol, a.s.: <http://www.transpetrol.sk/en/crude-oil-pipeline-network-in-the-slovak-republic/>

²⁸ Transpetrol, a.s.: <http://www.transpetrol.sk/en/planned-projects/>

²⁹ Slovnaft: <https://slovnaft.sk/en/about-us/our-company/profile/>

amounted 5.5 million of tons of crude oil, representing about 57.72 % of the quantity transported by Druzhba pipeline³⁰ (Figure 4).

Figure 4. Crude oil transported to individual customers



Source: Annual reports Transpetrol, author

Natural gas

Slovakia has the second most concentrated gas infrastructure in terms of gas pipelines developed in residential areas (being Netherlands at the first place).³¹ Large gasification of the country in eighties and nineties contributed to emission decrease in the country. Domestic production is very limited (Figure 1) and the country is dependent on imports from other countries, notably Russian federation. Natural gas remains important especially in the heating sector and takes largest part of the gross inland consumption (Figure 2).

The sector is dominated by company *Slovenský plynárenský priemysel, a.s. (SPP)* with its 100% subsidiaries *Eustream* (for transport) and *SPP Distribution*. Similarly to the situation in electricity market 51 percent of the company remains in the state's hands. *NAFTA, a.s.* is the only domestic producer, but the production covers very little, approximately 2 percent of the consumption.

The transmission system (entry-exit based) is under responsibility of *Eustream* and consists of four or five parallel pipelines mostly 1200/1400 mm in diameter with an operating pressure of 7.35 MPa. The pressure differential needed for a continuous gas flow is ensured by four large compressor stations (the most important and almost the largest in the EU is located in Velke Kapusany) with an aggregated power of almost 500 MW³².

2006 and 2009 crisis put natural gas at the first place of discussion on energy security, as the country experienced total cessation of gas supplies from Russian federation (see part Strategic Communication). Currently there are two big projects aiming to improve the interconnectivity of the country. Polish – Slovak interconnector expected to be finished in 2021 includes

³⁰ Annual report of Transpetrol: http://www.transpetrol.sk/wp-content/uploads/VS_TRANSPETROL_2017_na-USB.pdf

³¹ O plyne: <https://www.oplyne.info/o-zemnom-plyne/>

³² Eustream: <https://www.eustream.sk/en-transmission-system/en-transmission-system>

construction of the pipelines and auxiliary infrastructure at the both countries. On the Slovak side, it also includes the modification of the compressor station in Velke Kapusany. Approximately 59 km of the transmission pipeline is located in Poland and 106 km in Slovakia³³. The advantage of the interconnection would contribute the regional infrastructure by connecting Slovakia to LNG terminal in Świnoujście and gain access to world LNG market.

The second project, called Eastring, aims to connect Slovakia to the South-Eastern European region and planning to be opened also from gas from alternative sources. It is a bi-directional gas pipeline interconnector of an annual capacity between 208,000 GWh up to 416,000 GWh (ca. 20 bcm up to 40 bcm), connecting Slovakia with Bulgaria through the territory of Hungary and Romania³⁴.

Coal

The role of coal in overall energy mix has been decreasing over past decades, even years. Coal is used especially for steel industry, but also in heat and power generation. Lignite accounts around two-thirds of coal in heat and power generation, and the remaining share is imported hard coal³⁵. Domestic production in Upper Nitra region does not cover coal demand. Domestic coal is uncompetitive and the sector is highly dependent on state subsidies.

The only coal mining company is *Hornonitrianske bane Prievidza, a.s.* focusing on brown coal mining with an annual production 1.9 million tonnes. The coal is supplied mainly to the company *Slovenské elektrárne*, for further process to coal powered power plant Nováky located in the region³⁶. There are currently three mining sites: Nováky, Handlová and Čáry. Mining in Cigeľ site was closed in 2017 due to depleted reserves. The country has two coal-fired power plants: Nováky (266 MW) generating around 1.6 terawatt hours of electricity per year and Vojany (220 MW).

Year 2018 was crucial milestone for Slovak coal mining industry, because Minister of Economy announced the end of state subsidies for coal mining in 2023³⁷. The main reason is to meet the EU goals to limit emissions. The coal mining region takes part in three pilot regions founded by the European Commission to assist in fair and just energy transition and develop new alternatives for the region.³⁸

³³ Gaz system: <http://en.gaz-system.pl/press-centre/news/information-for-the-media/artykul/202643/> (20.12.2017)

³⁴ Eastring: <https://www.eastring.eu/page.php?page=about>

³⁵ Energy Policies of IEA countries: Slovak Republic review 2018, p. 59

³⁶ Hornonitrianske bane Prievidza: <http://www.hbp.sk/index.php/uhlie>

³⁷ Žiga ohlásil koniec dotovania ťažby hnedého uhlia, mal by prísť v roku 2023: <https://dennikn.sk/1293285/ziga-ohlasi-koniec-dotovania-tazby-hnedeho-uhlia-mal-by-prist-v-roku-2023/> (19.11.2018)

³⁸ What you should know about the Slovakian coal phaseout announced in Paris: <http://www.just-transition.info/what-you-should-know-about-the-slovakian-coal-phaseout-announced-in-paris>

Strategic Communication

According to the official document *Energy Policy of the Slovak republic* energy security consists of two pillars: diversification of energy sources and transport routes and increasing the level of nuclear safety³⁹. The following part of the report will focus on natural gas sector that is pillar of energy security discussion. Especially security of supply has gained the attention of Slovak politician after 2006 and especially 2009 gas crisis. In 2009 Slovakia was one of the Central and Eastern European countries that experienced total cessation of natural gas supplies from Russian federation (through Brotherhood pipeline). The interruption of gas supplies due to tense Russian (Gazprom) – Ukrainian (Naftogaz) relations meant also damages on Slovak economy.

The reason why the country was hit broadly by the cessation of supplies was the infrastructure of pipelines: the gas flew through the Brotherhood pipeline in one direction only (from East to West). Gas crisis changed also the attitude of political leaders of the region who started to push forward diversification projects to increase energy security. The crises was a milestone from rhetorical support to concrete steps to create new infrastructure projects⁴⁰. Since then the situation in Slovakia has improved and diversification efforts were put on the first place to prevent repetition of such crises in the future. Large improvements were done by building new pipelines and increasing the capacity of existing ones.

As a reaction to the crises Slovakia has introduced several large investments to improve the cross-border infrastructure, increase of existing capacities, developing storage capacities and building new compression stations. Improving interconnections with neighbouring countries includes building the reverse flow from Austria and Czechia, the bidirectional reverse flow to Ukraine and building new interconnection with Hungary. An interconnection with Poland is under construction will connect Slovakia to Polish LNG terminal in Świnoujście and the feasibility of the Eastring project connecting Slovakia with Bulgaria through the territory of Hungary and Romania was presented.

Within the process of cross-border connection the crucial role has been played by Projects of Common Interests (PCI). PCI are projects introduced by the European Commission and are key to the prioritization of strategic infrastructure projects in the whole EU by improving interconnectivity between countries. It must be said that the funding itself was important and key factor of success was financial support of the EU through Connecting Europe Facility fund⁴¹.

Whereas in gas sector the situation has remarkably improved, there still remains the lack of diversified crude oil sources and around 99 percent come from Russian federation via Druzhba pipeline. The situation has improved after completing the interconnection to Adria pipeline. Another big project that has been under discussion is connection of Slovnaft and Schwechat refineries that would connect Slovak and Austrian oil infrastructure. However, the routing of the pipeline is still questionable due to environmental concerns, especially underground water sources on the Slovak part and the negotiations are still going on⁴².

Diversification of routes thus remains in the core of communication with other countries and at international level. Lack of alternative routes in 2009 meant political action and new cross-

³⁹ Energy Policy of the Slovak Republic: <https://www.economy.gov.sk/uploads/files/47NgRIPQ.pdf>

⁴⁰ Mišík, Matúš. (2012). Crisis as remedy? The 2009 gas crisis and its influence on the increase of energy security within Visegrad Group countries. *International Issues & Slovak Foreign Policy Affairs*. 1-2. 56-72.

⁴¹ Oravcová, Veronika & Mišík, Matúš. (2018). EU funds and limited cooperation: energy infrastructure development in the Visegrad Group. 27. 11-26.

⁴² Transpetrol, a.s.: <http://www.transpetrol.sk/en/planned-projects/>

border infrastructure is also one of the main priorities of Visegrad Group (V4). Energy security thus remains key issue that is regularly included in V4 presidency programs and discussed among the political leaders at various forums and conferences to prevent similar crises in the future⁴³. **The communication at international level lies primarily in the prevention of the crises and by diversification activities.**

Currently the most uncertain issue of energy security is future of gas transit through Ukraine. The current gas shipping contract between Russia (Gazprom) and Ukraine (Naftogaz) is to expire at the end on 2019 and the future contract is not clear yet. For Slovakia there is also questionable transit due to Nord Stream 2 that will bypass Ukraine and Slovakia as well, but the Ministry remains optimistic as the demand for gas in the EU is still increasing⁴⁴. Good example of concrete move is the introduction of solidarity mechanism based of the requirements of the EC Regulation 2017/1938.

The respondents of the interviews highlights the importance of V4 high level group on energy that meets regularly. Energy security issue is understood more as *security of supply* for think tanks and political representatives as well. However, they note that level of communication at international level is difficult due to various interests of the countries and the countries compete also for the market and do not have common goals. That could cause many contradictory positions. Respondents agreed that communication at national level is much easier. ENTSO-G is a platform that plays crucial role in communication among various actors from various countries representing various (often contradictory) positions.

Act 80/2019 amends and supplements Act 416/2012 on crises management in gas and electricity sector. **The communication at national level among the main actors takes part of the strategic documents of the Ministry of Economy** (Preventive Action Plan⁴⁵ and Emergency Plan⁴⁶ both updated in 2017) with clearly established roles of the main actors involved.

Emergency Plan sets that in a case of crisis situation, the crisis management is created and conveyed by the Ministry of Economy. The management consists of ministry representatives, operators of gas infrastructure (transmission and distribution networks, storage), representatives of the Regulatory Office for Network Industries and representatives of the Ministry of Foreign and European Affairs. The other members may be invited based on actual situation, such as transmission operators in case of the need for grid balancing.

Crisis management meets on a daily basis and coordinates all the strategies and decisions at national level based on the actual information from operators of gas infrastructure. They also communicate their decisions to society, other institutions at national or the EU level. **The communication with civil society is thus secured through the media that inform about crises management decisions on a daily basis.**

The model implied in the Emergency Plan results from the real crisis management in 2009. Strategic communication during gas supply crisis in 2009 was primarily responsibility of the Ministry of Economy. There has been created crisis management who met on a daily basis at the Ministry. Several institutions were represented: representatives from the Ministry itself, representatives of the Ministry of Foreign and European Affairs, Regulatory Office, State

⁴³ Presidency Programs: <http://www.visegradgroup.eu/documents/presidency-programs>

⁴⁴ Pri sporoch Rusko - Ukrajina pre plyn chce byť Slovensko sprostredkovateľom: <https://spravy.pravda.sk/ekonomika/clanok/514696-pri-sporoch-rusko-ukrajina-pre-plyn-chce-byt-slovensko-sprostredkovatelom/> (05.06.2019)

⁴⁵ Preventive Action Plan: <https://www.economy.gov.sk/uploads/files/PS41ZTp9.pdf>

⁴⁶ Emergency Plan: <https://www.economy.gov.sk/uploads/files/CF8Tt6y.pdf>

Energy Inspection (currently the Slovak Trade Inspection), gas companies operated on a market (suppliers and gas infrastructure operators of transit, distribution network and storage facilities).

Moreover, there were involved also companies from the electricity sector because of the potential impact of the gas supply crisis on the transmission system and electricity supply. According to the evaluation of the Ministry of Economy, the biggest advantage of such communication was direct coordination of stakeholder activities and direct information of individual subjects about the current situation which helped also politicians to solve the problem at international level⁴⁷. Crisis management also informed the media (thus also the public) on a daily basis about the progress, which is an important element within the whole process.

The respondents of the interviews also acknowledge the crucial role of the government (as energy security is a problem of the country) and main gas operators in the process. Moreover, in Slovakia there is a platform for discussion and information sharing: *Slovak gas and oil association* which is an independent association of companies and experts active in gas and oil sectors⁴⁸.

One of the respondents from non-governmental sector stresses that *“the contacts with governmental bodies or business are strongly informal and without any barriers. Many contacts were established after the energy crisis and are based on mutual trust because many of them know each other since then.”* Mutual trust is highlighted also by another respondent. As they all agree on, regular meetings at various forums and conferences help to build trust across all actors (business, government and non-governmental).

As one of the respondents highlights, government and companies representatives has very good access to data, so they do not really read think – tank or media analysis. Another respondent sees the advantage in independent think – tank analysis, such as KPMG or Hungarian Rekk to provide bigger picture of the situation.

Recommendations:

Strategic communication does not really counts with non-governmental organizations and actors in the crises scenarios. In fact, the crucial role is played by the main companies and the government. However, these organisations can provide useful information to ministries for example in describing the best practices from other countries and thus provide bigger picture of the possible crises scenario. As one of the respondents of the interviews notes, there is a will to share information also with think tanks from the part of the government representatives. Another respondent sees the role of the non-governmental organisations in participating of the evaluation of strategic communication of the institutions and possible improvements for the future.

The communication is strongly focused on energy security (security of supplies), but the idea of common market is often neglected. When talking about strategic communication, there should be also move from energy security issues towards common market as one of the respondents highlights: *“So to a big extend I will say, that the essential principle of energy security should be perfectly working market. I stressed perfectly working market, not as*

⁴⁷ Government Office of the Slovak Republic: <https://rokovania.gov.sk/download.dat?id=64F86A5A5F49446B98673CD23817714B-8DB55E835E7BCB8F6CF4C6B003F0E92A>

⁴⁸ Slovak Gas and Oil Association: <http://www.spnz.sk/en/about-spnz/info-about-spnz.html>

transformation from monopoly to market then you no longer have the benefits of monopoly but still you don't have the benefits of the market."