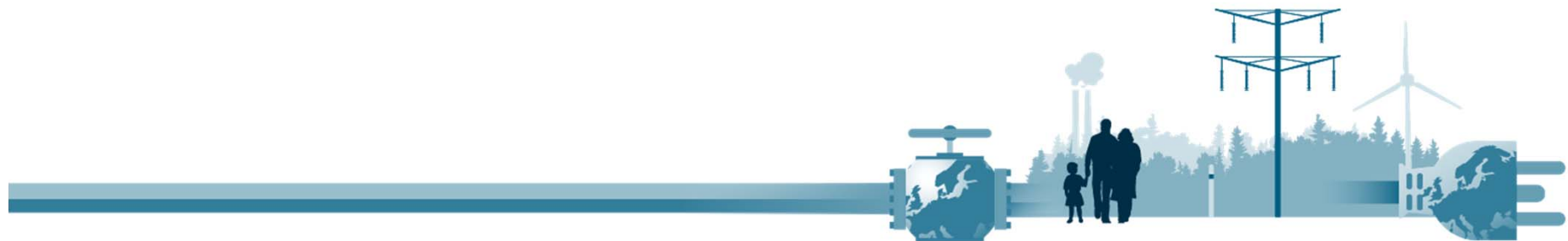


Welcome to Shippers' Forum

Jeppe Danø, 9 March 2017



Sikkerhed i Energinet.dk

Safety at Energinet.dk



Sikkerhedsguide
Host



Nødudgange
Emergency exit



Hjertestarter
Defibrillator (AED)



Samlingssted
Meeting point

Agenda

- 12-13 *Lunch and networking*
- 13:00 **Welcome**
Jeppe Danø, Energinet.dk
- 13:10 **Joint Balancing Zone**
Camilla Mejdahl Mikkelsen, Energinet.dk
- 13:20 **Status on the Supply Situation 2017 and without Tyra 2018-2021**
Christian Meiniche Andersen, Energinet.dk, and Christian Rutherford, Energinet.dk
- 13:45 **Open Season Status**
Christian Rutherford, Energinet.dk, and Adam Marzecki, GAZ-SYSTEM S.A.
- 14:15 *Coffee break and networking*
- 14:45 **Joint Billing in the Danish Gas Market**
Clement Johan Ulrichsen, Danish Gas Distribution A/S
- 15:05 **Tariff Network Code**
Nina Synnest, Energinet.dk
- 15:15 **End of Programme**



Shipper survey now!

- Help PRISMA evaluate how they are doing, and what can be done better.
- This will allow them to better tailor the platform to fit shipper needs.

Shipper event in June.

- Shippers will learn about new developments within PRISMA, have the chance to share their experience, and meet the PRISMA team.

<https://corporate.prisma-capacity.eu/company-events/shipper-event-2017-brussels/>

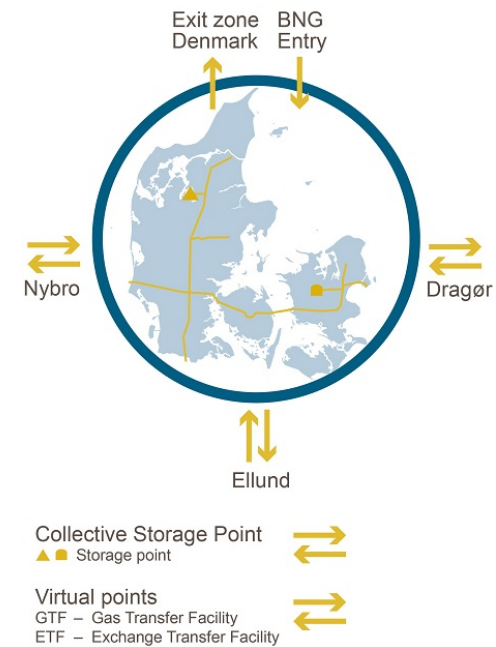
Internal points at the PRISMA platform?

Energinet.dk considers moving the internal points in the Danish gas system from Energinet.dk online to PRISMA

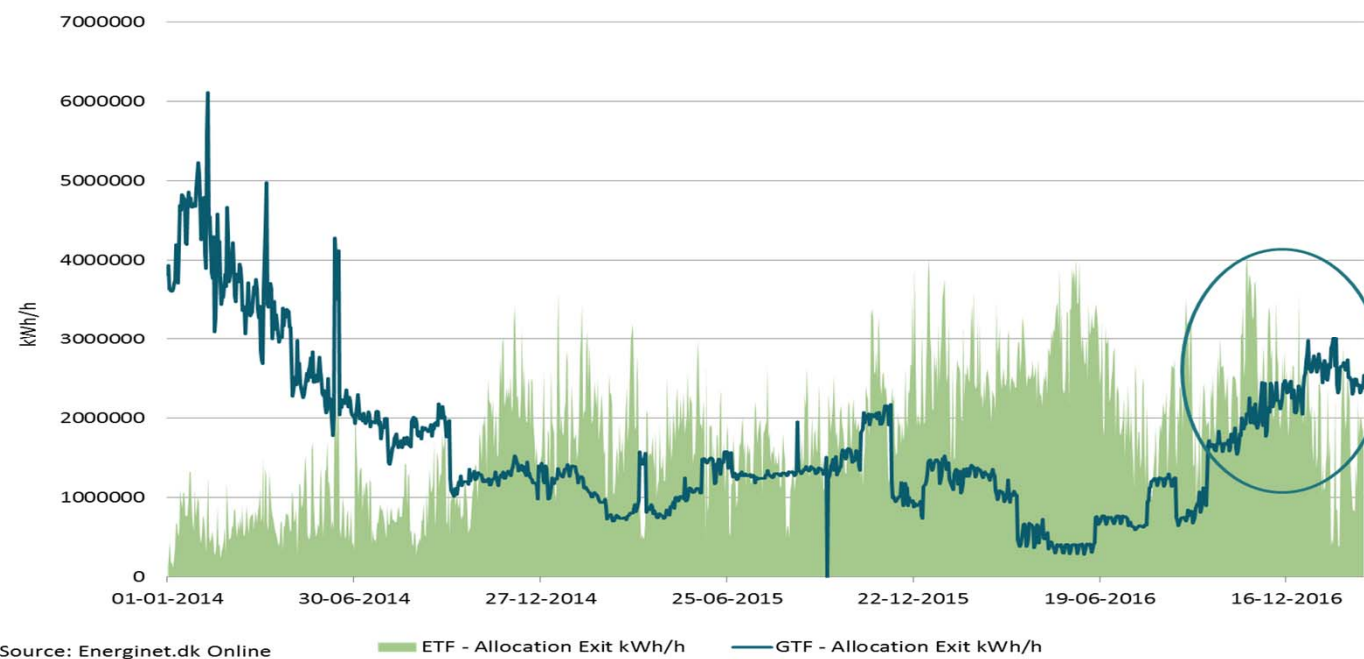
After consultation with market participants and DERA...

...and IT adjustments in back-end system

Deadline: 1 October 2017



Development in allocation on GTF and EFT



Energinet.dk's analysis assumptions 2017

Workshop about Analysis Assumptions 2017

14 March 2017

10 am - 14 pm

Tonne Kjærs Vej 65, 7000 Fredericia



Consultation process

17 March to 3 April 2017

Sign up

Energinet.dk's homepage\ABOUT US\Conferences

<http://www.energinet.dk/EN/OM-OS/Konferencer/Sider/Konferencer-2015.aspx>

Green Gas Forum 15 March 2017

Themes

- New model for biomethane connection to grid
- Perspectives for new biomethane products and consumer segments
- Status on biomethane development
- Copenhagen vision of 100% biogas delivered to city gas grid
- Green gas from a storage perspective



Speakers from the Danish Energy Authority, HOFOR, HMN, Gas Storage Denmark and Energinet.dk

Participation free of charge. Approx. 80 participants.

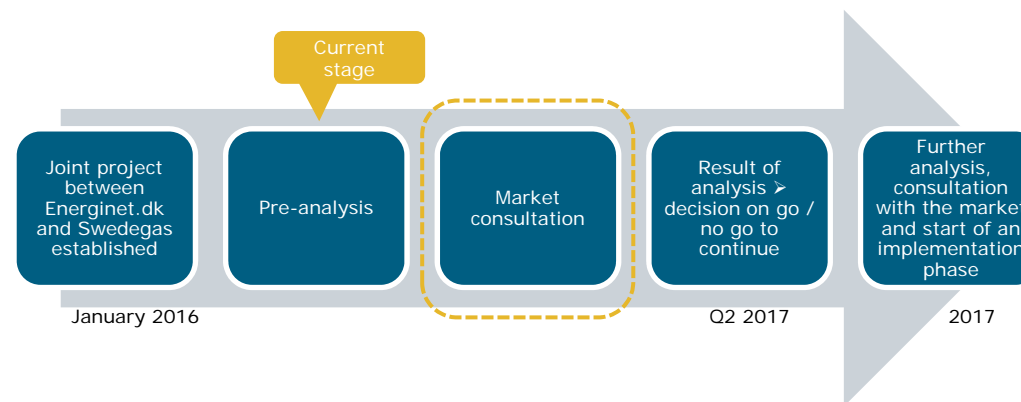
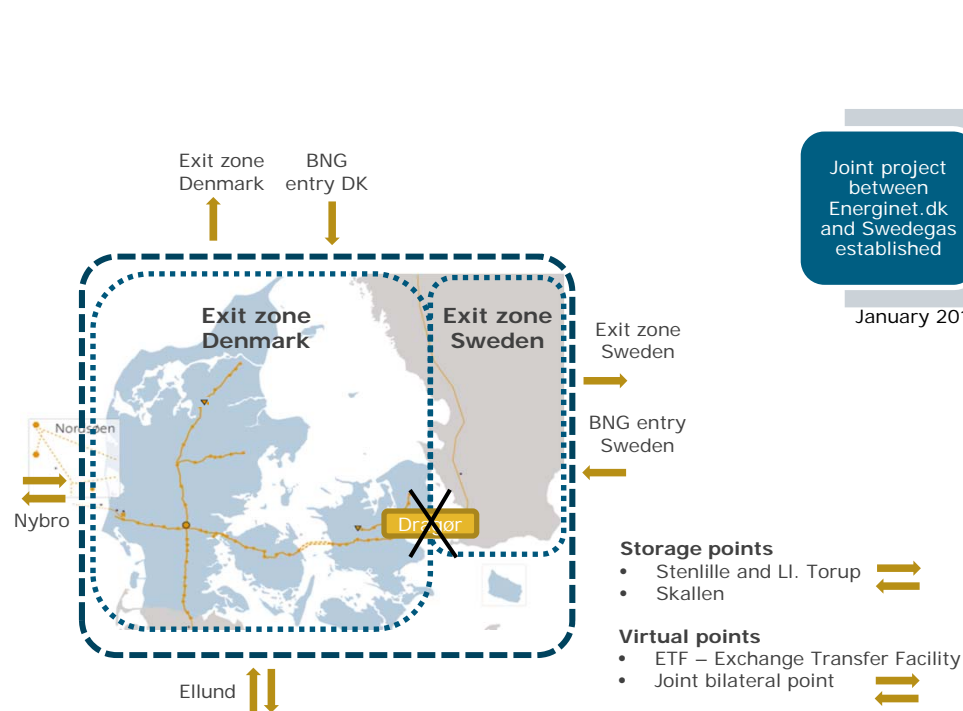
Joint Balancing Zone

Camilla Mejdahl Mikkelsen



Joint balancing zone

- Status



Workshop

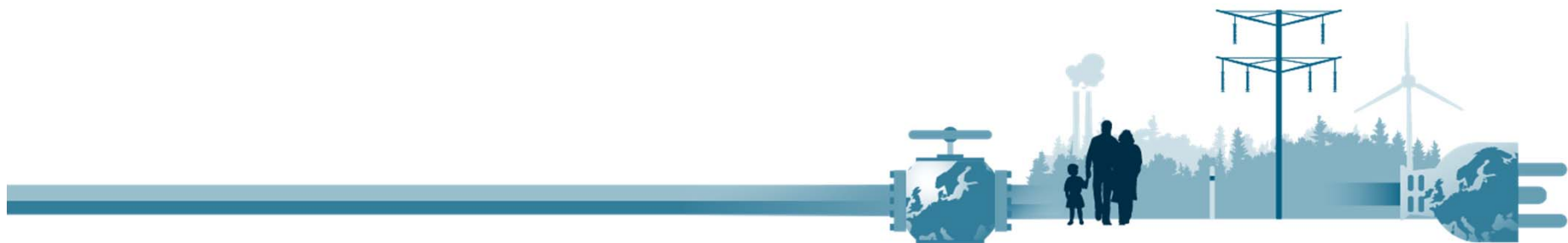
30 March 2017 from 13-15, Ballerup
31 March 2017 from 10-12, Gothenburg

Sign up at jbz@energinet.dk or jbz@swedegas.se

Shippers' Forum

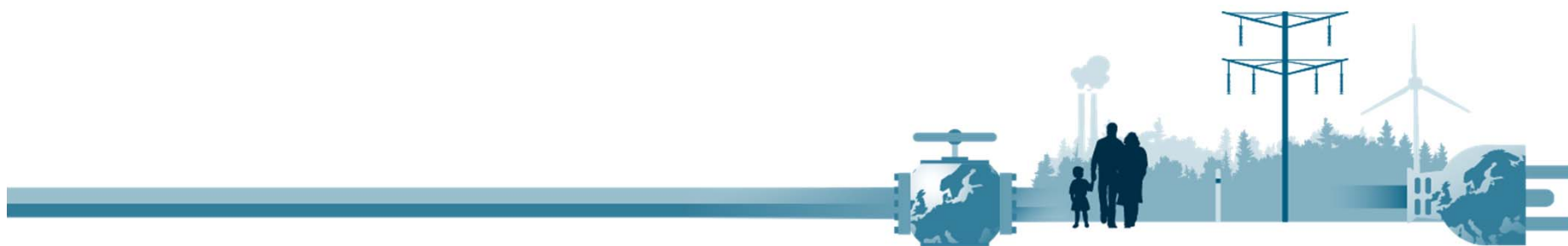
Status on supply situation 2017 and without Tyra 2018-2021

Christian Meiniche Andersen



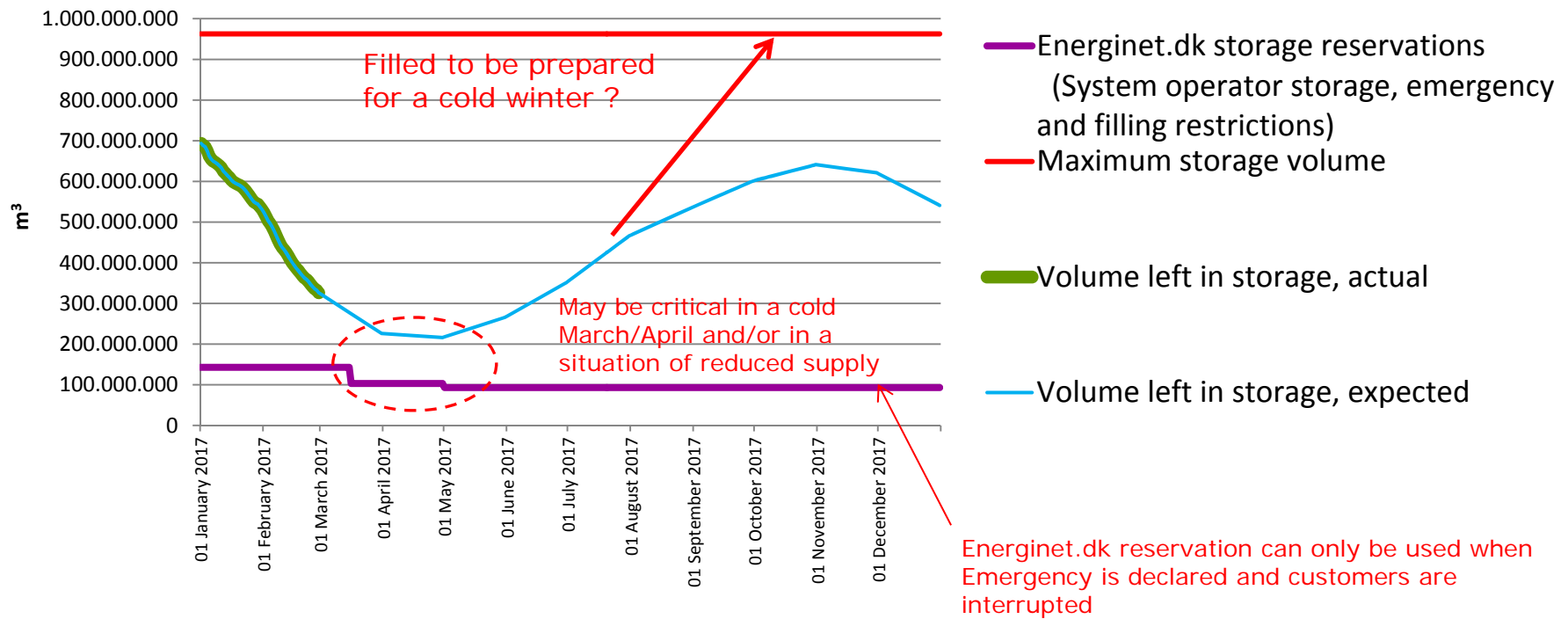
Klassificering:

Status on supply situation 2017

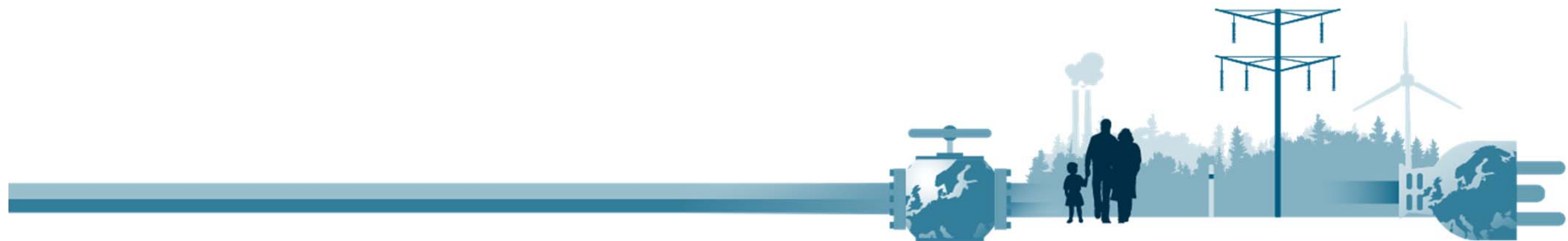


Klassificering:

Residual volume in storage facilities 2017



Supply situation without Tyra 2018-2021



Memorandum August 2016

The main conclusion from the analysis is that Danish and Swedish consumers will continue to benefit from a robust supply situation if Tyra shuts down. If, at the same time, the majority of the Danish production in the North Sea is closed down for a number of days, the system becomes less flexible and more vulnerable to incidents occurring compared to today's supply situation.

Energinet.dk intends to take various measures in relation to the market and to infrastructure in order to ensure minimum infrastructure capacity. The situation requires preparation and attention on the part of Energinet.dk, the adjacent systems and the market. The gas supply is to be secured.

Same messages today. However, the supply situation is even more tight than anticipated

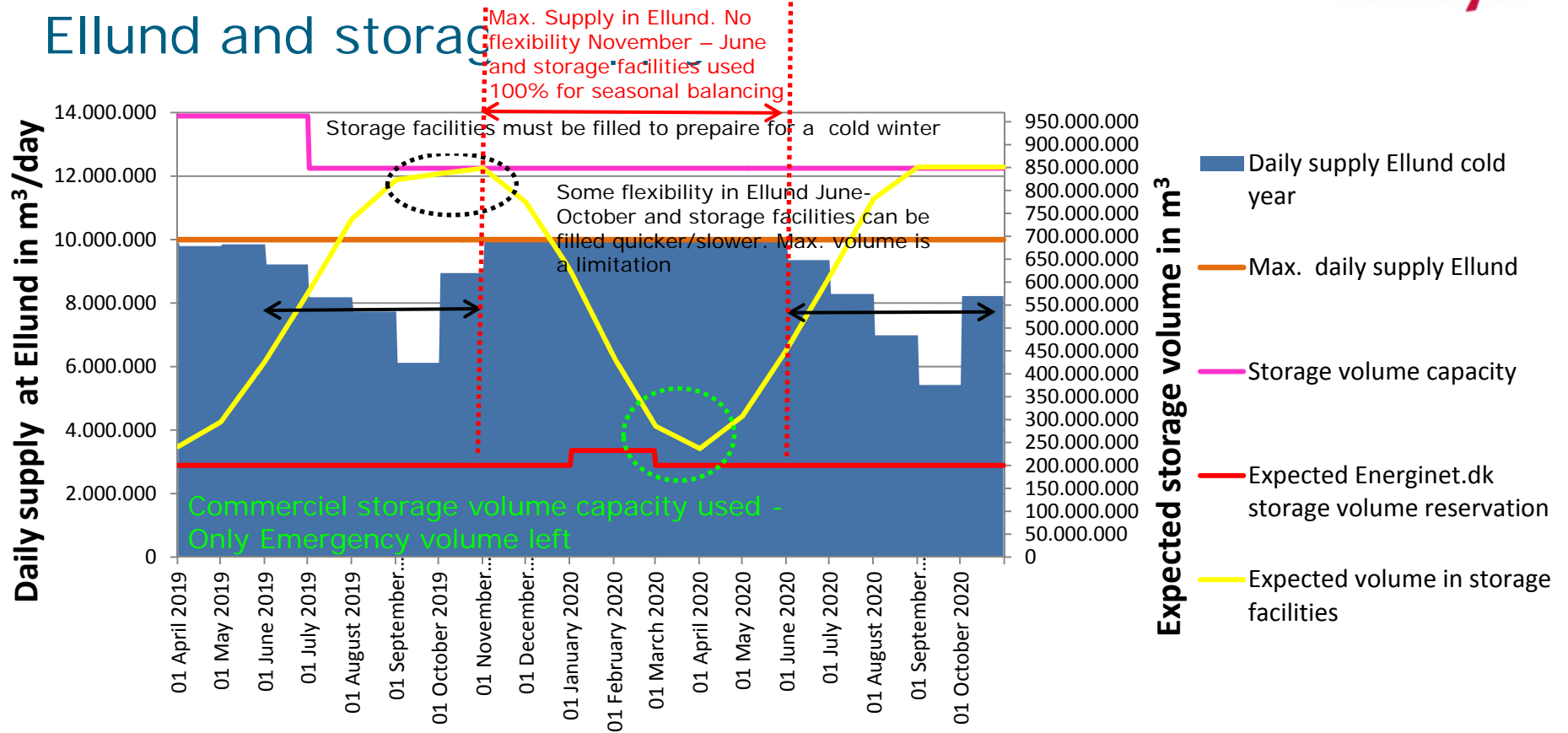
An extremely long and hard winter with disruption of the supply sources will be challenging. However, careful planning and focusing on the optimal use of the capacity in the system will mitigate the risk of supply failure.

New supply conditions

1. Less commercial storage volume available in 2019:
 - 1 cavern less at Lille Torup
 - Gas from Germany has a lower gross calorific value and compressibility
 - Energinet.dk must reserve further Emergency storage to fulfil the EU N-1 regulation
2. No surplus capacity in the transmission system in Northern Germany

Supply situation without Tyra 2018-2021

Ellund and storage



Conclusion

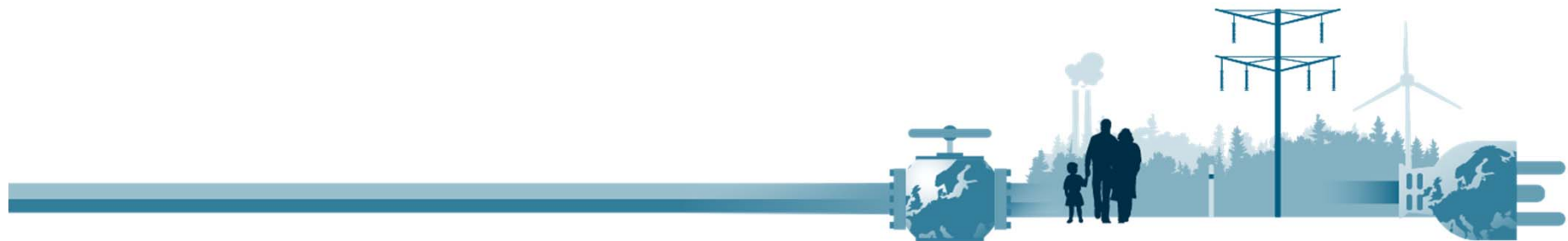
When Tyra closes, the system changes from being in a situation with the highest historical flexibility to a situation with the lowest possible flexibility:

- Capacity in Germany must be used whenever capacity (firm and interruptible) is available
- Storage facilities must be filled 100% before winter to be prepared for cold winter (20-year incident)

Tyra – Market

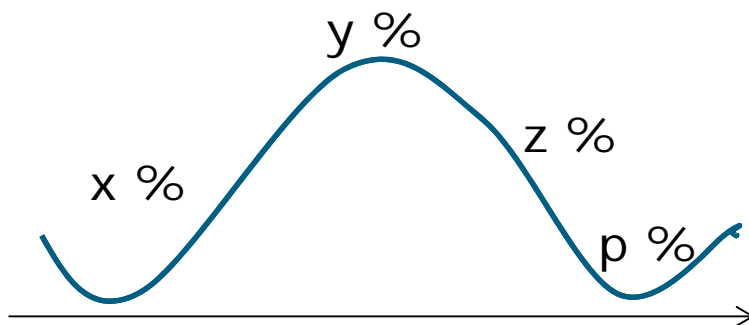
Upcoming workshop

Christian Rutherford

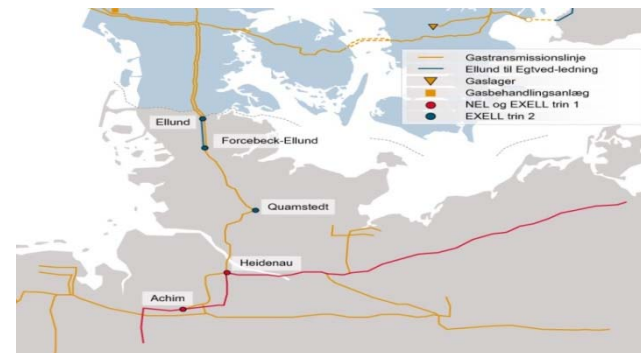


Our focus – gas enough both yearly and daily

Efficient use of storage

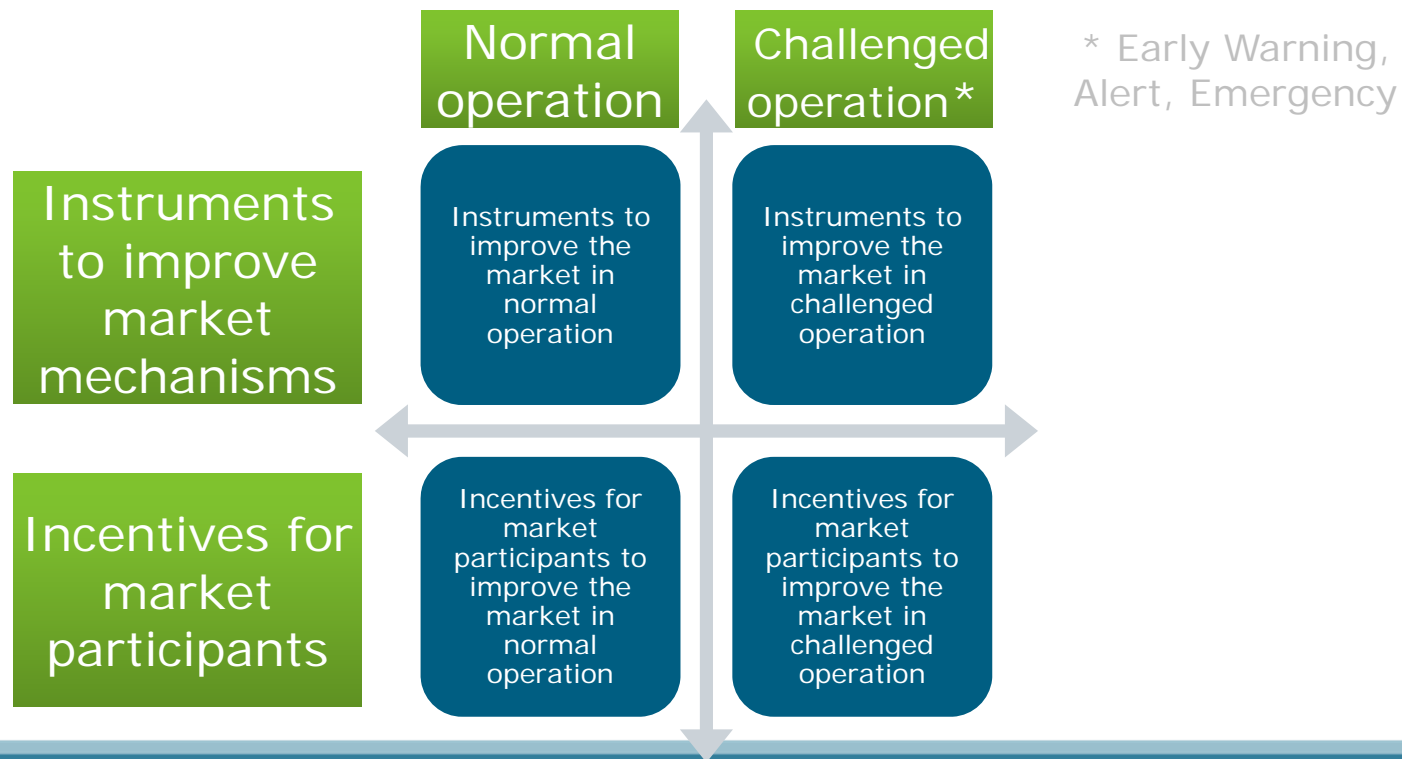


Efficient use of Ellund



Need for close communication and prospective new measures

Grouping of potential solutions



User Group on Tyra – Market development

When

- 30 March 2017 from 10 to 12 at our Ballerup offices
- (The workshop on a joint balancing zone between Sweden and Denmark is held in the afternoon from 12 to 15 the same day)

Purpose

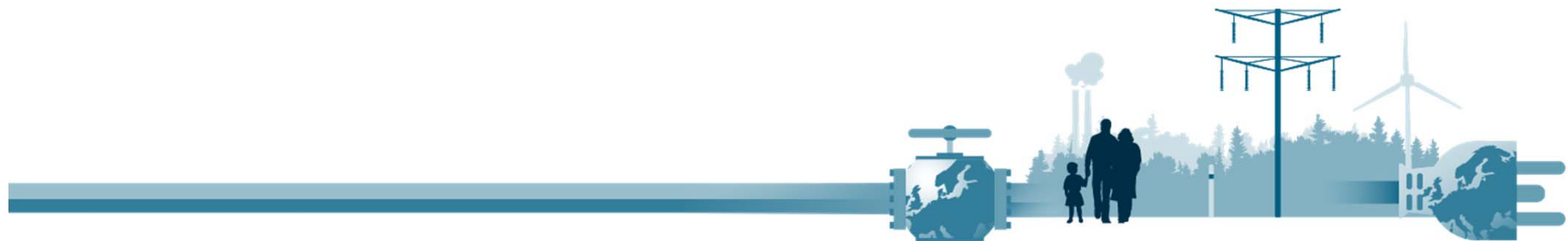
- To collect a catalogue of prospective ideas and measures from the market
- To have more clarity as regards the role of Energinet.dk and the market for all participants

How

- We expect the market to come up with the ideas!
-

Open Season 2017

Adam Marzecki, GAZ-SYSTEM S.A.
Christian Rutherford, Energinet.dk

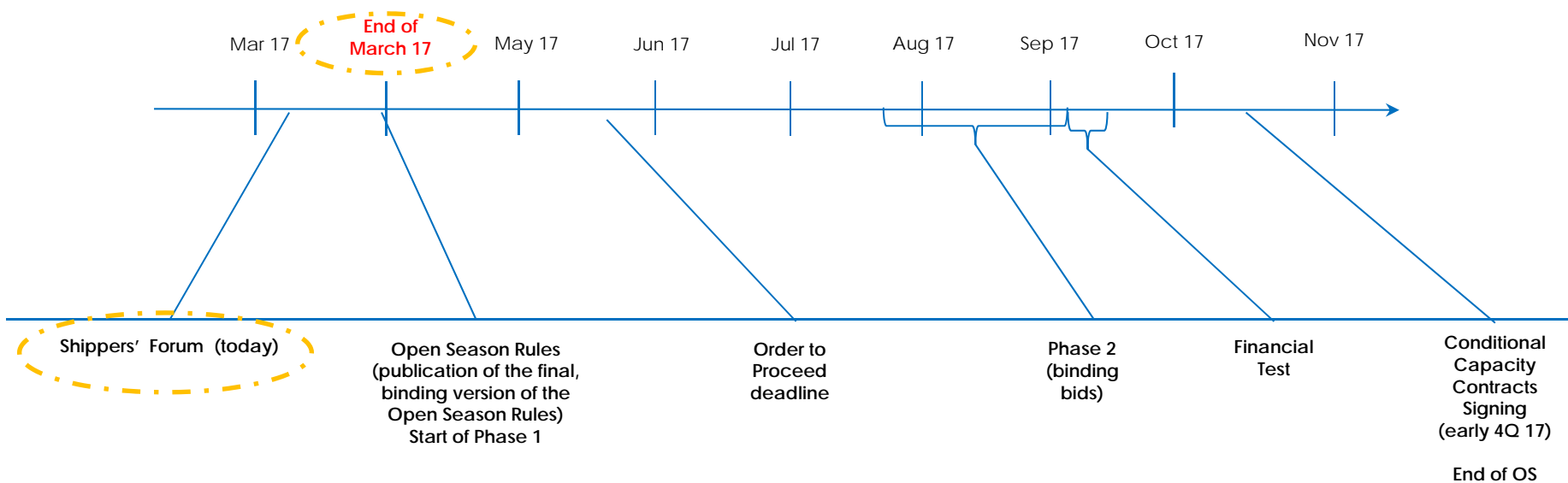


Klassificering:

Current status

- ✓ **Market consultation completed:** On the basis of the collected feedback from the market consultations, both TSOs are working on the final OS 2017 documentation in close cooperation with the relevant NRAs.
- ✓ Both TSOs intend to launch the Open Season 2017 procedure by the end of March 2017
- ✓ The information on launching the Open Season 2017 will be announced by publication of the documents on the TSO's websites

Expected timeline for Open Season



The aim is still 1 October 2022

Main changes in the Open Season documents as the result of market consultation process

Increasing transparency

- Eg improvement of data in the Information Packages 1 and 2
- General improvement of clarity in the Open Season documents
- Information Paper, to explain in further detail specific questions from the consultation
- More details on Fast Track process

Increasing clarity on allocation methodology

- Eg more clarity on how capacity will be allocated in case of excess demand

Reducing risk

- Eg increasing information for the Open Season participants during the implementation phase
 - Increasing security in relation to the Open Season documentation
 - Potential measures to reduce transportation cost risks
-

www.energinet.dk/openseason2017

<http://en.gaz-system.pl/stefa-klienta/konsultacje-z-rynkem/zakonczone-procedury/2017/open-season-baltic-pipe/>



Coffee break and networking

We will meet again at 14:25



Tariff Network Code

9 March 2017

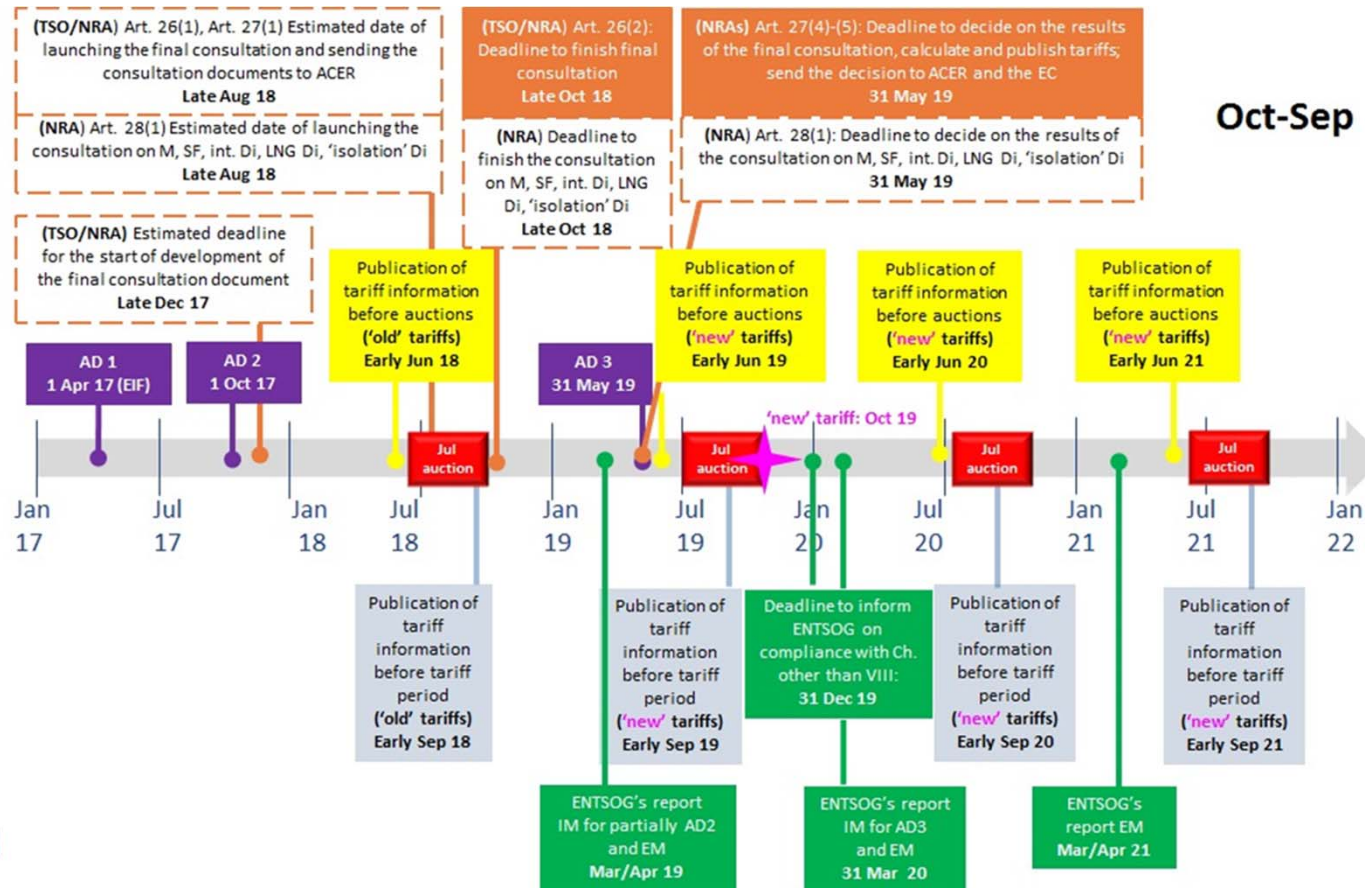
Nina Synnest (nsy@energinet.dk)



Agenda

- Time line
- Allocation methods
- Shipper Task Force

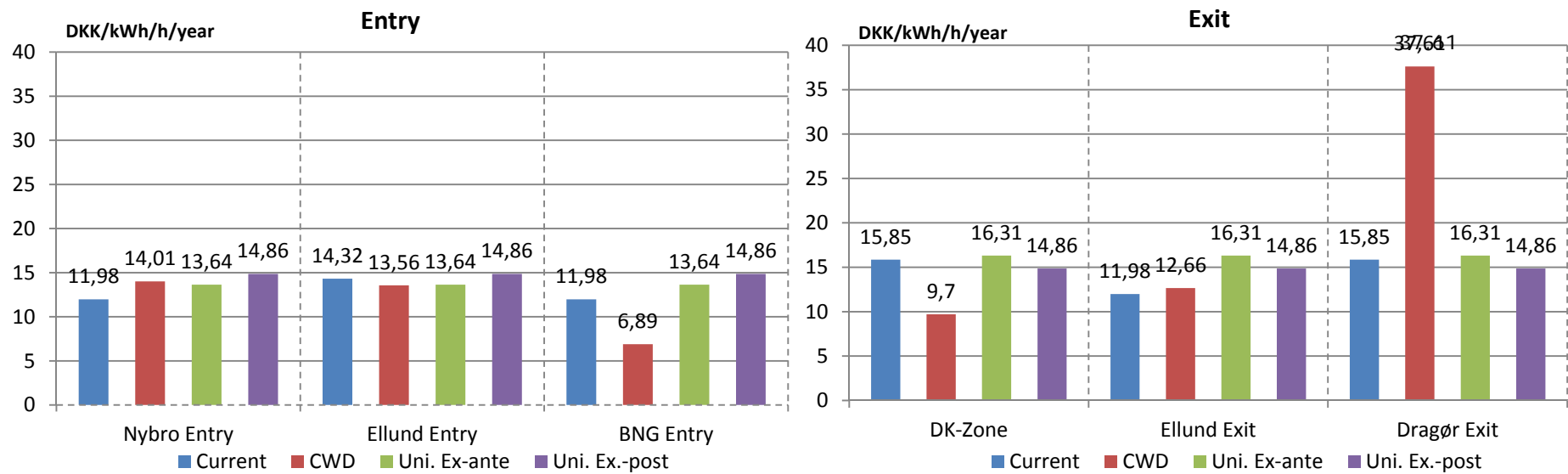
Timeline



Oct-Sep

The application regarding the future tariff methodology is expected to be submitted to DERA by the end of year 2017 (Oct./Nov.)

Comparison of cost allocation methods



Invitation to participate in a Shipper Task Force

- Shippers will be involved in the elaboration of a new tariff methodology for the Danish gas market
- Will report to the User Group
- Working group:
 - Active participation is required
 - Elaborate examples
 - Discuss effects and incentives
- First meeting in April 2017
- Sign up by sending an e-mail to gastariffs@energinet.dk

Max. 8 participants (one for each company)

Thank you for your attention!

See you at the next Shippers' Forum on

22 June 2017

