



Northern sources as opportunity for the market in the region

Vienna, 3rd April 2025



Gas Transmission System Operator in Poland Owner and Operator of the LNG Terminal in Świnoujście

KEY NUMBERS

12 151 km
LENGTH OF TRANSMISSION SYSTEM

840
GAS FACILITIES

14
COMPRESSOR STATIONS

7
CROSS-BORDER INTERCONNECTORS

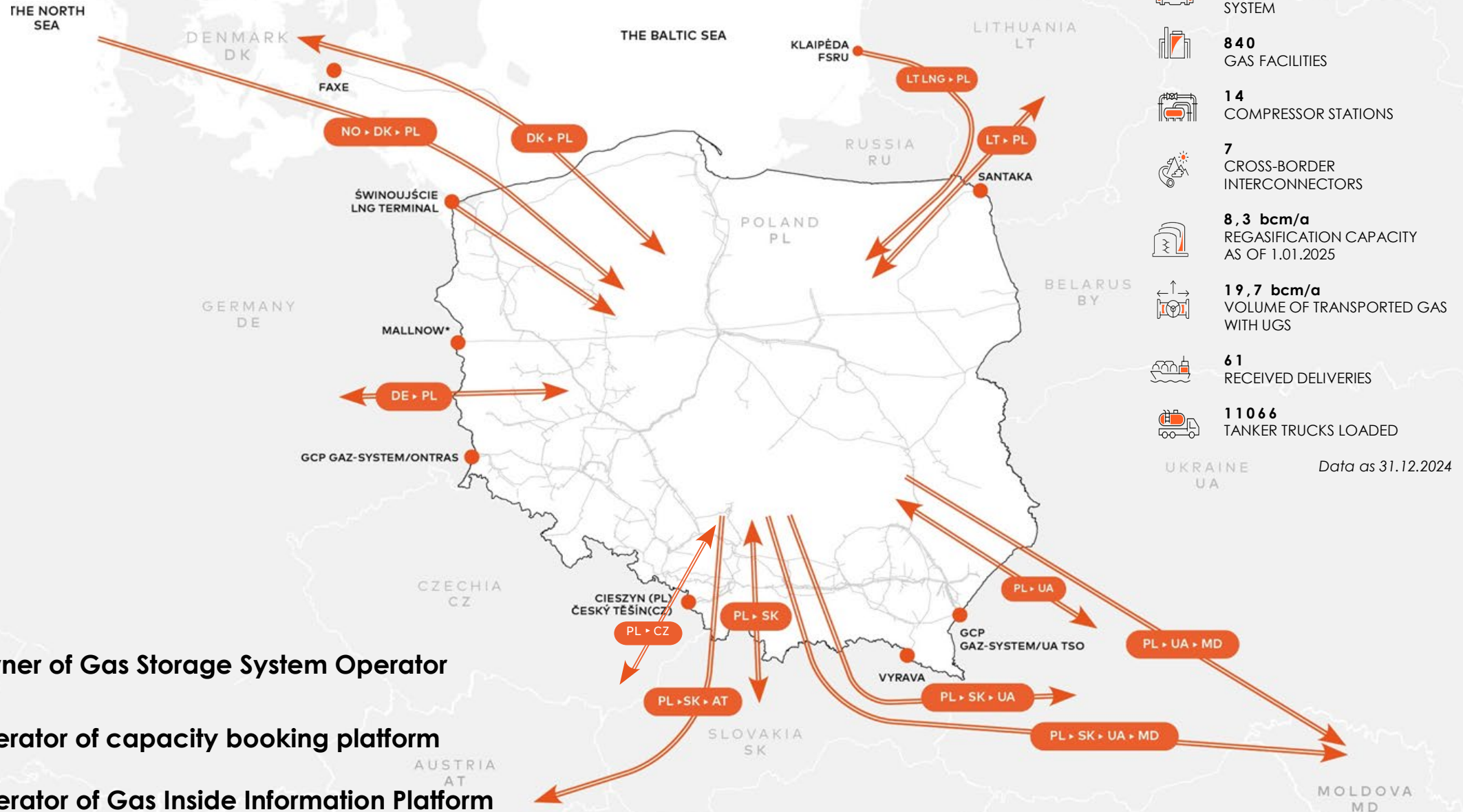
8,3 bcm/a
REGASIFICATION CAPACITY AS OF 1.01.2025

19,7 bcm/a
VOLUME OF TRANSPORTED GAS WITH UGS

61
RECEIVED DELIVERIES

11 066
TANKER TRUCKS LOADED

Data as 31.12.2024



Owner of Gas Storage System Operator



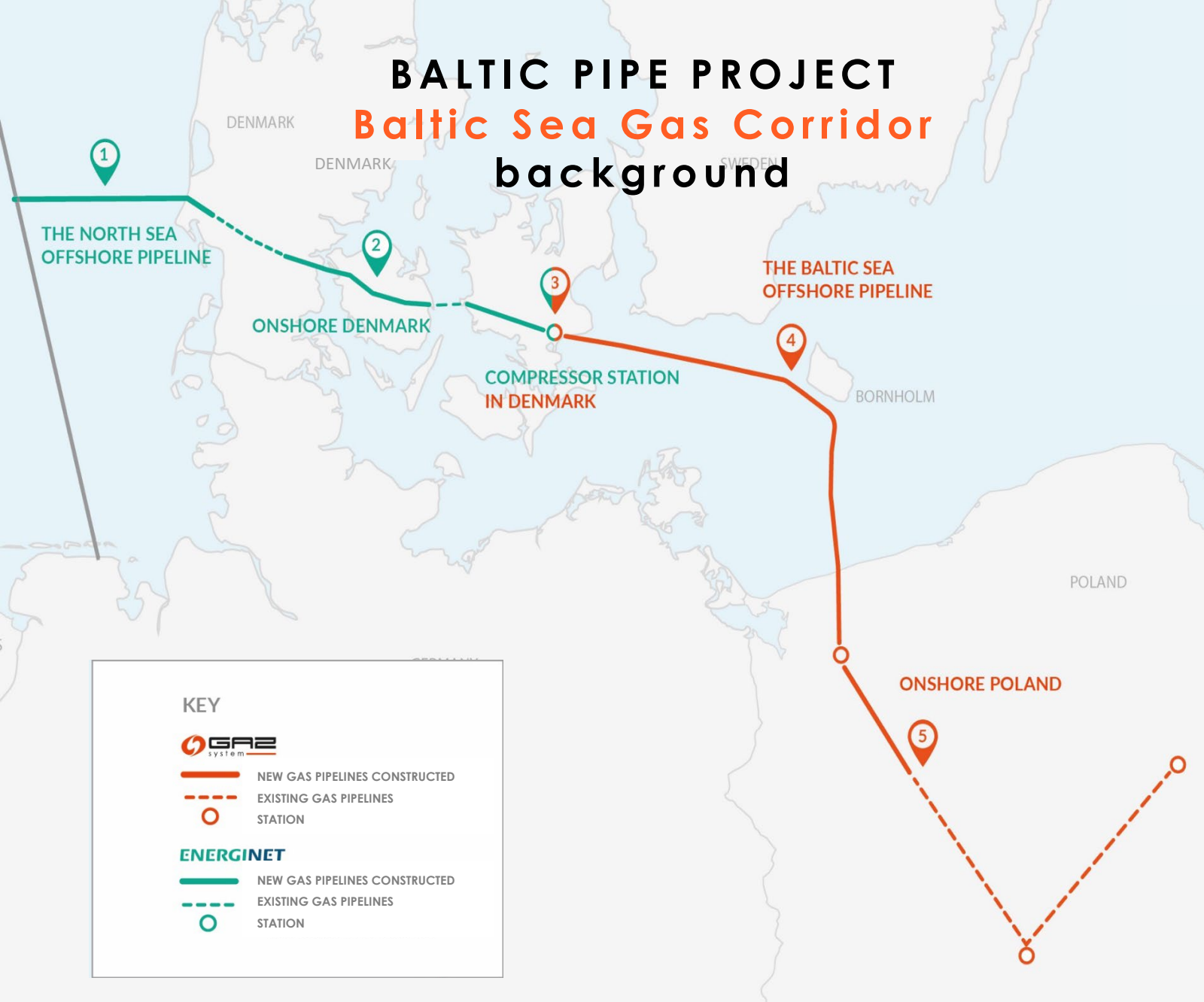
Operator of capacity booking platform



Operator of Gas Inside Information Platform

BALTIC PIPE PROJECT

Baltic Sea Gas Corridor background



KEY

GAZ system

- NEW GAS PIPELINES CONSTRUCTED
- EXISTING GAS PIPELINES
- STATION

ENERGINET

- NEW GAS PIPELINES CONSTRUCTED
- EXISTING GAS PIPELINES
- STATION

- Bi-directional connection**
Norway → Denmark ↔ Poland
- 2 project promoters**
GAZ-SYSTEM and Energinet
- 10 bcm/y (DK-PL)
3 bcm/y (PL-DK)**
capacity
- 2022**
Start of gas transmission
- EUR 266.8 million**
EU support under the CEF Program
- ~900 km**
Total length of gas pipeline
- 4**
Compressor stations
- 3 years**
Duration of construction works
- 6.7 - 12 MPa**
Operating pressure
- 50 years**
of technical design life

DIVERSIFICATION OF GAS SUPPLIES VIA BALTIC SEA GAS CORRIDOR

TOTAL CAPACITY

10 bcm/y

AVAILABLE CAPACITY

2 bcm/y

BALTIC SEA GAS CORRIDOR diversified sources of natural gas supply to Poland and Denmark providing direct access to gas deposits in Norway.

BALTIC SEA GAS CORRIDOR can supply additional **2 bcm of gas per year** securing the gas supply to **Central and Eastern Europe**.

Affordable, easily available, reliable and instant.



TRANSMISSION COSTS* TO CENTRAL AND EASTERN EUROPEAN COUNTRIES



Country	Direction	Yearly product	Monthly product January	Monthly product August
SLOVAKIA	NO → DK → PL → SK	6,13	9,05	7,53
CZECH REPUBLIC	NO → DK → PL → SK → CZ	7,46	10,90	9,38
AUSTRIA	NO → DK → PL → SK → AT	7,58	11,08	9,55
UKRAINE	NO → DK → PL → UA	5,26	7,75	6,23
MOLDOVA	NO → DK → PL → UA → MD	7,68	10,34	8,81
LITHUANIA	NO → DK → PL → LT	5,27	7,79	6,26

*Natural gas transmission prices for 2025 [EUR/MWh/h per h]
According to published documents as of November 2024

GAS TRANSMISSION & SUPPLY POSSIBILITIES ACROSS POLAND IN 2025

LNG TERMINAL IN ŚWINOUJŚCIE
8.3 bcm/year

PLANNED FSRU TERMINAL
6.1 bcm/year

TRANSPORT ROUTES

BALTIC PIPE

10 bcm/year (DK → PL)
3 bcm/year (PL → DK)

POLAND – GERMANY

IP MALLNOW
0 bcm/year (PL → DE)
9.2 bcm/year (DE → PL)

GCP GAZ-SYSTEM/ONTRAS

0.003 bcm/year (PL → DE)
1.6 bcm/year (DE → PL)

POLAND-CZECHIA (Cieszyn)

0.35 bcm/year (PL → CZ)
0.6 bcm/year (CZ → PL)

POLAND-SLOVAKIA (Vyrava)

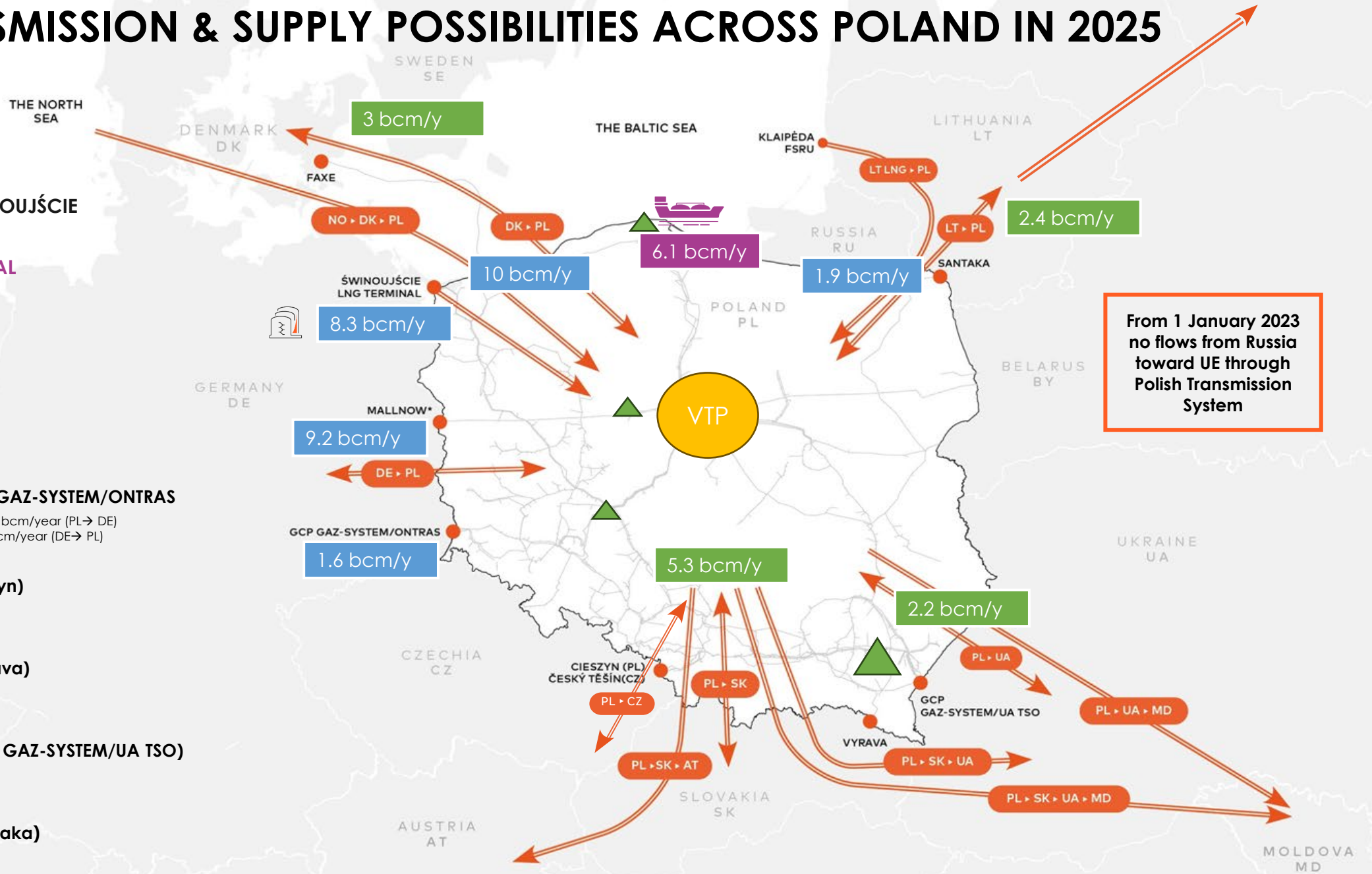
4.7 bcm/year (PL → SK)
5.7 bcm/year (SK → PL)

POLAND – UKRAINE (GCP GAZ-SYSTEM/UA TSO)

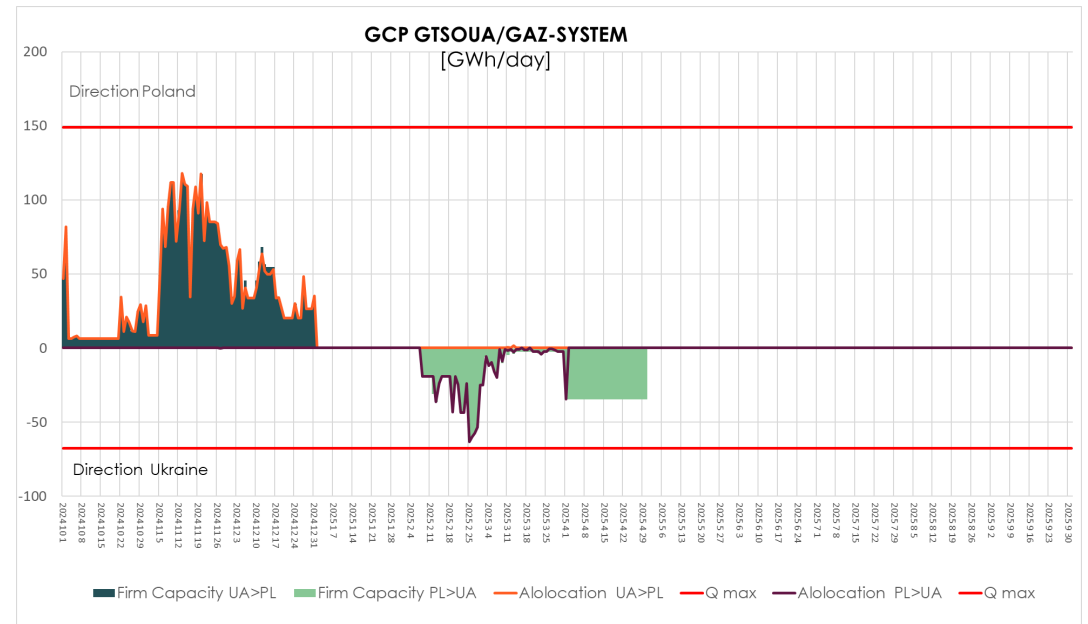
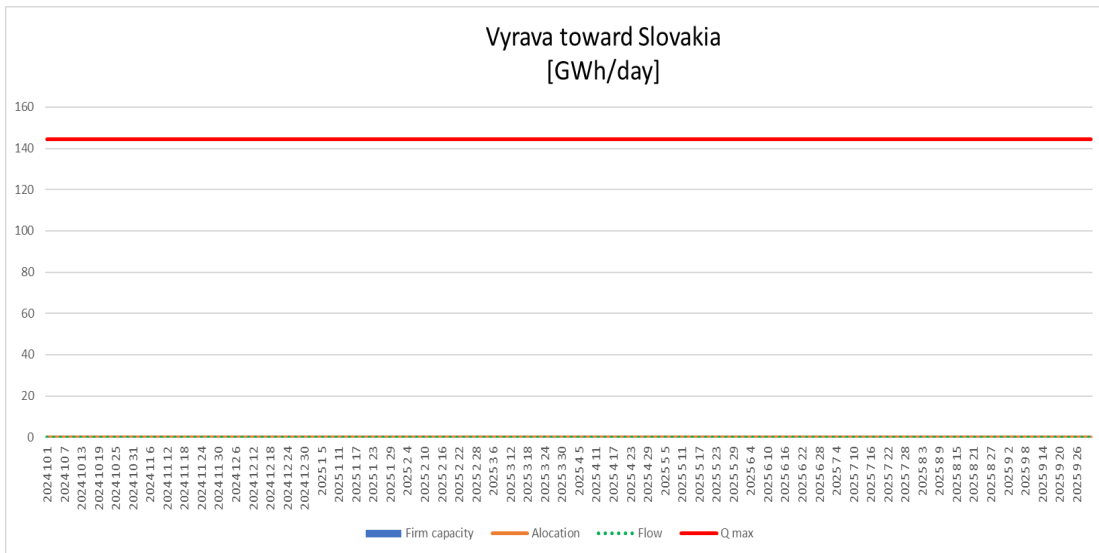
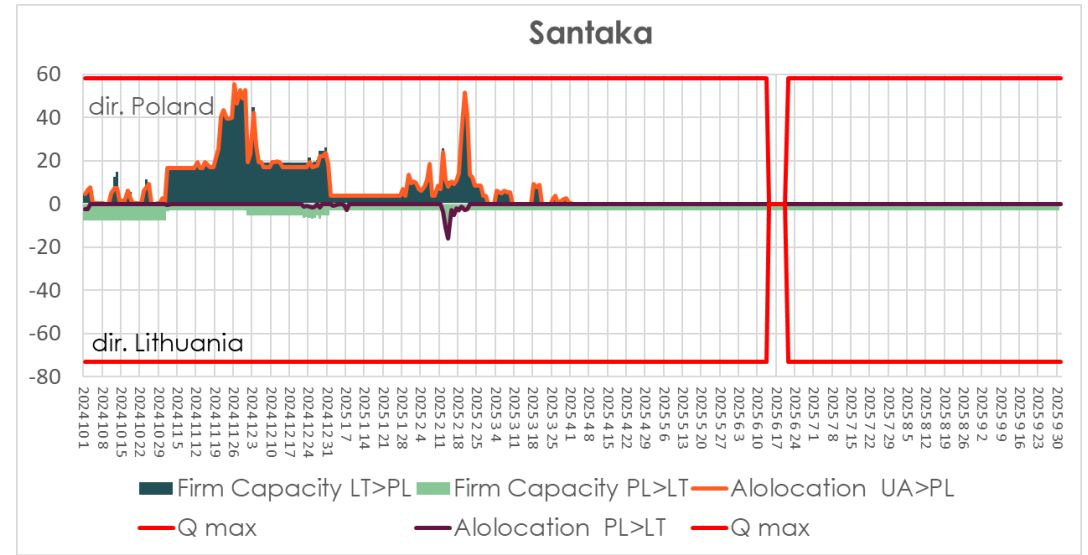
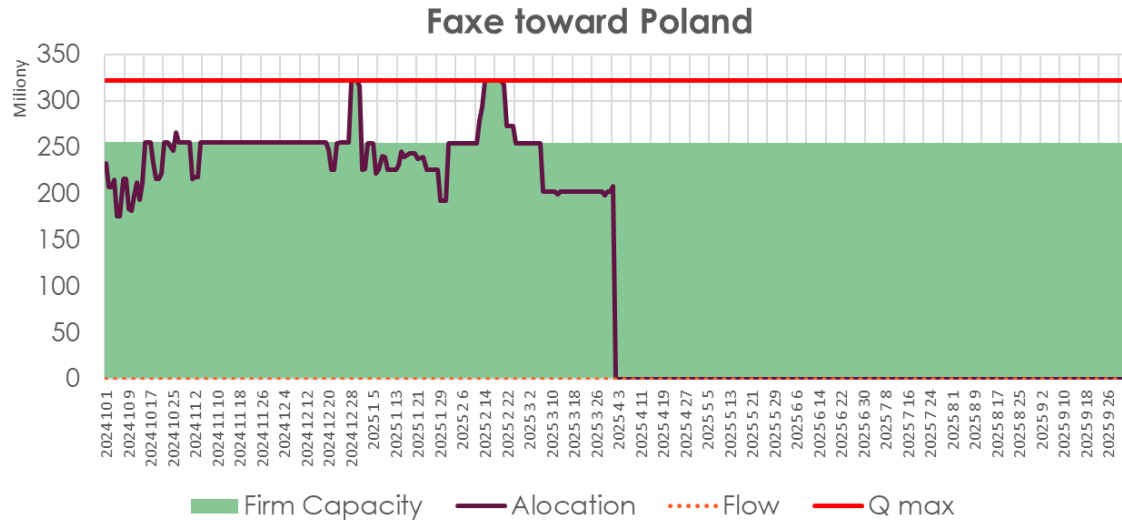
2.2 bcm/year (PL → UA)
4.4 bcm/year (UA → PL)

POLAND-LITHUANIA (Santaka)

2.4 bcm/year (PL → LT)
1.9 bcm/year (LT → PL)



BALTIC SEA GAS CORRIDOR USAGE AND OPPORTUNITIES IN 2024/2025



MARKET NEWS FOR 2025/2026

TARIFFS

- ▶ **President of the Energy Regulatory Office Information as of 18 Feb 2025 regarding the discounts in tariffs for 2026**
 - ▶ **Discount for LNG Terminal** - decreased from 100% to 70%
 - ▶ **Short-term capacity products** - decreased factors
- ▶ **Discounts for renewable and low carbon gases**
 - ▶ **At IPs** - derogation from 5 August 2025 until 31 December 2026 based on decision of the President of the Energy Regulatory Office as of 6 March 2025
 - ▶ **At injection points and storages** - suspension of the process

BOOKING PLATFORM

- ▶ IP Mallnow - since yearly auction 2025 capacity will be offered at the GSA Platform

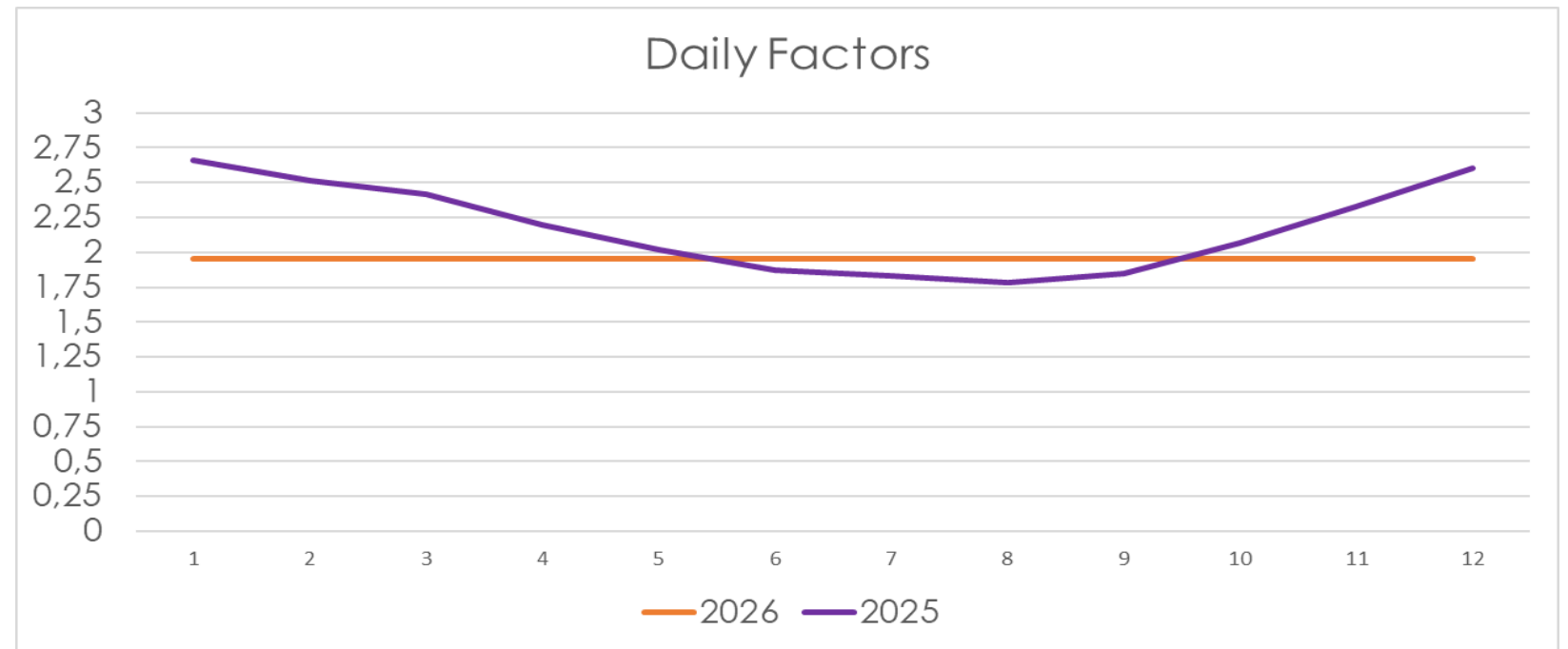
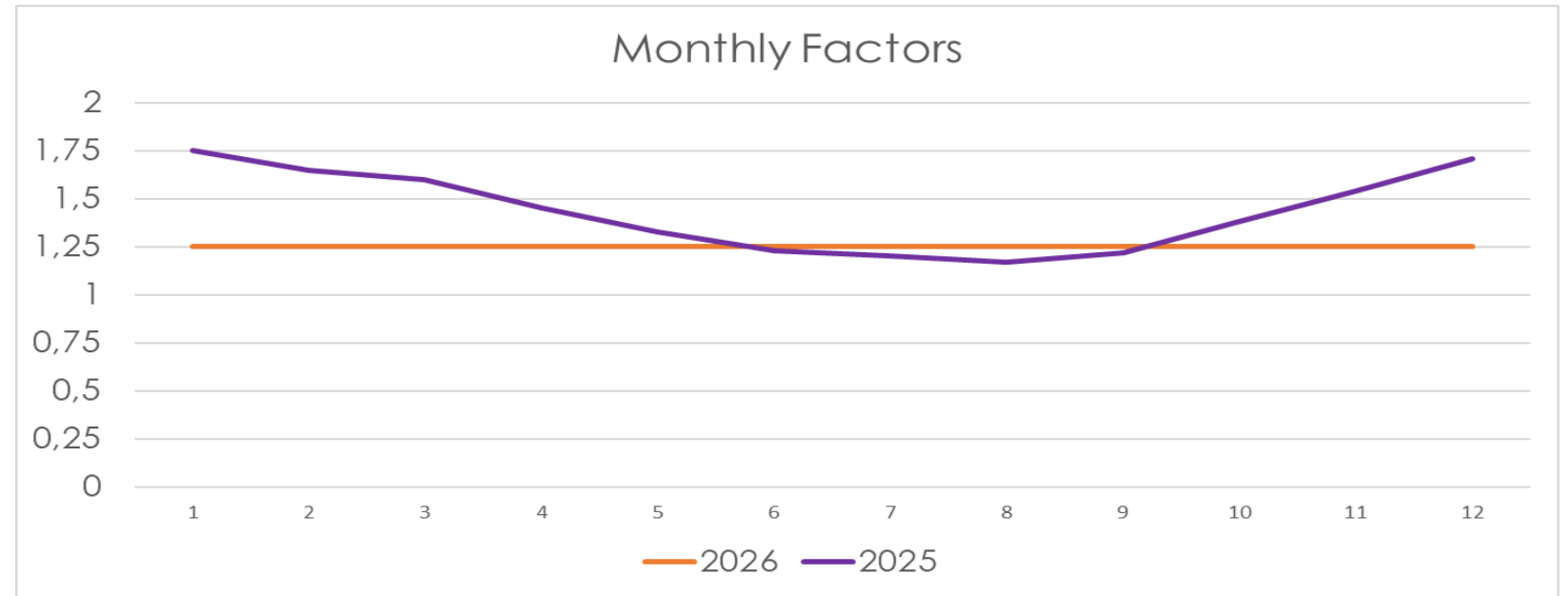
MANDATORY NATURAL GAS STOCS

- ▶ Process of changes of law is pending

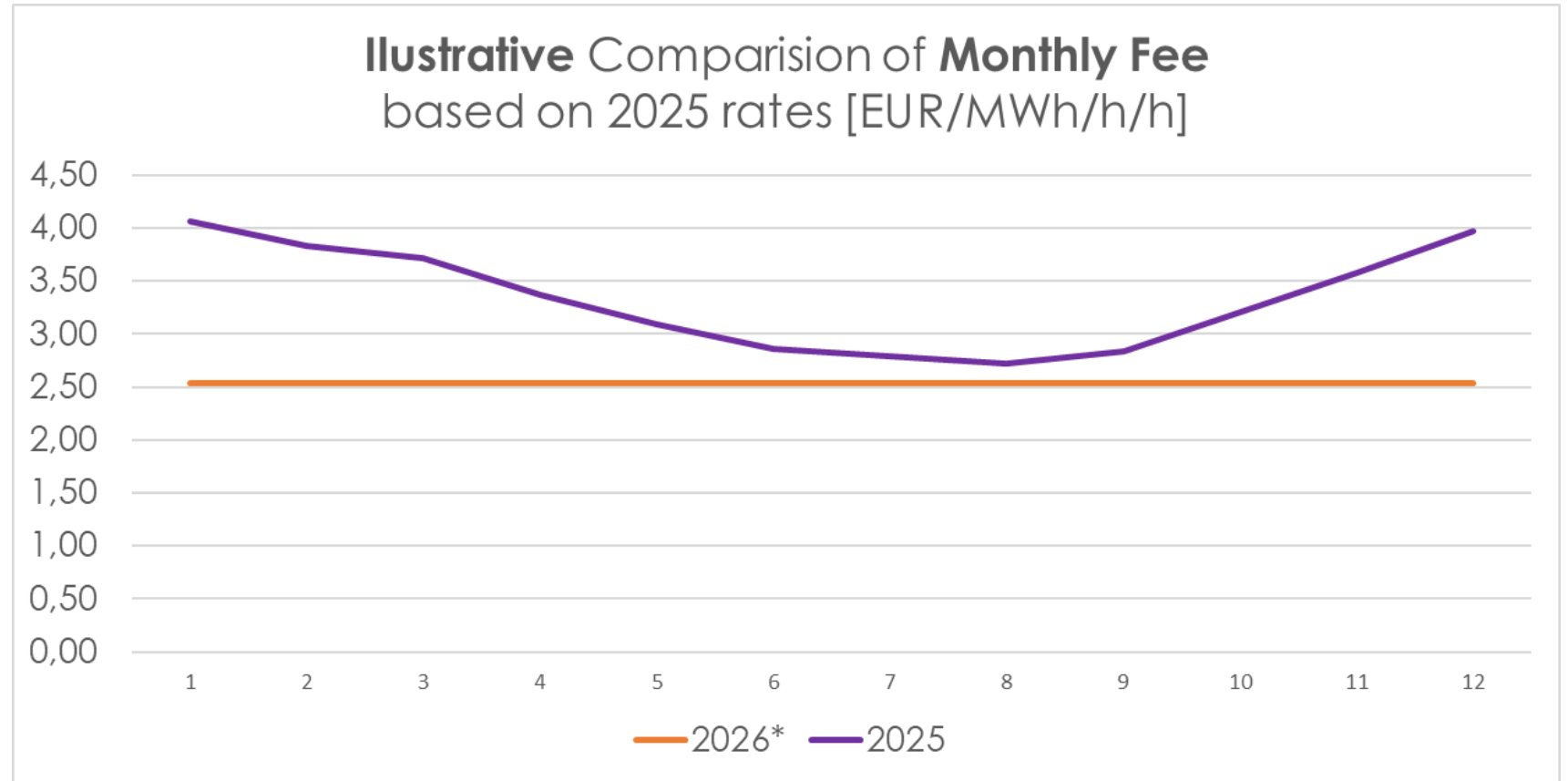
INCREMENTAL CAPACITY

- ▶ Next round of Incremental capacity will be launched in July 2025

CHANGE OF SHORT TERM FACTORS



CHANGE OF SHORT TERM FACTORS



* Values for 2006 are just for presentation of implementation effect of application all discount factor changes and they are not any forecast of tariff rates for 2026

**FOR MORE INFORMATION ABOUT
BALTIC SEA GAS CORRIDOR
SCAN & CONTACT US**



gasinfo@energinet.dk



klient@gaz-system.pl



Reliable transmission,
sustainable future.



**BENEFITTING FROM
TRANSPORT ROUTES
ACROSS POLAND**

**SCAN AND CONTACT OUR
GAS MARKET DEVELOPMENT DIVISION**





Thank you for your attention