



Northern and Baltic opportunities for Ukrainian market

Vienna, 10th June 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

THE NORTH SEA

DENMARK DK

THE BALTIC SEA

LITHUANIA LT

KLAIPEDA FSRU

RUSSIA RU

SANTAKA

POLAND PL

BELARUS BY

GERMANY DE

MALLNOW*

GCP GAZ-SYSTEM/ONTRAS

CZECHIA CZ

CIESZYN (PL) / ČESKÝ TEŠÍN (CZ)

VYRAVA

GCP GAZ-SYSTEM/UA TSO

AUSTRIA AT

SLOVAKIA SK

MOLDOVA MD



Owner of Gas Storage System Operator



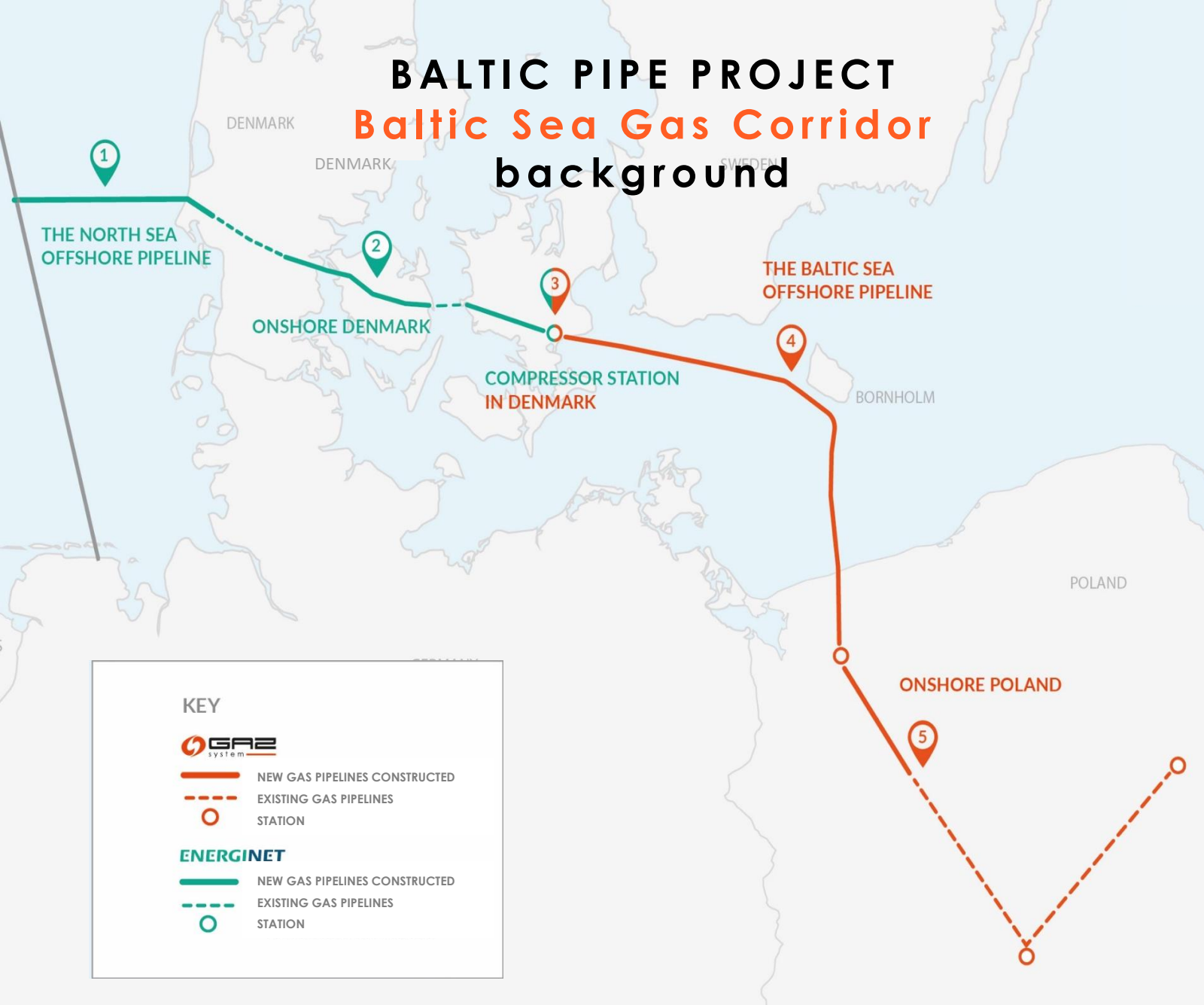
Operator of capacity booking platform



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 **GCP GAZ-SYSTEM/ONTRAS**
0 bcm/year (PL → DE) 0.003 bcm/year (PL → DE)
9.2 bcm/year (DE → PL) 1.6 bcm/year (DE → PL)

POLAND-CZECHIA (Cieszyn)

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

POLAND-SLOVAKIA (Vyrava)

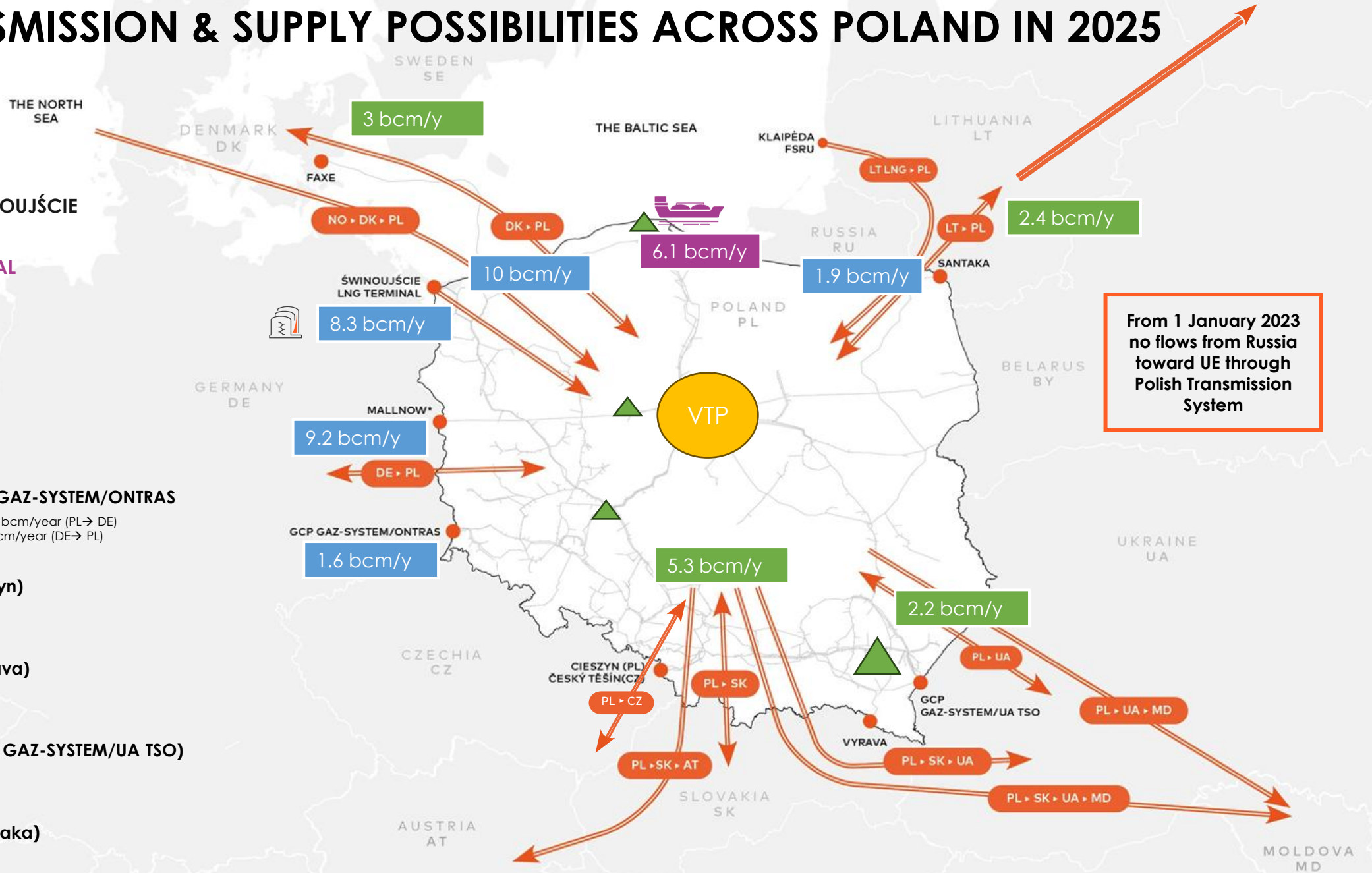
4.7 bcm/year (PL → SK)
5.7 bcm/year (SK → PL)

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

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

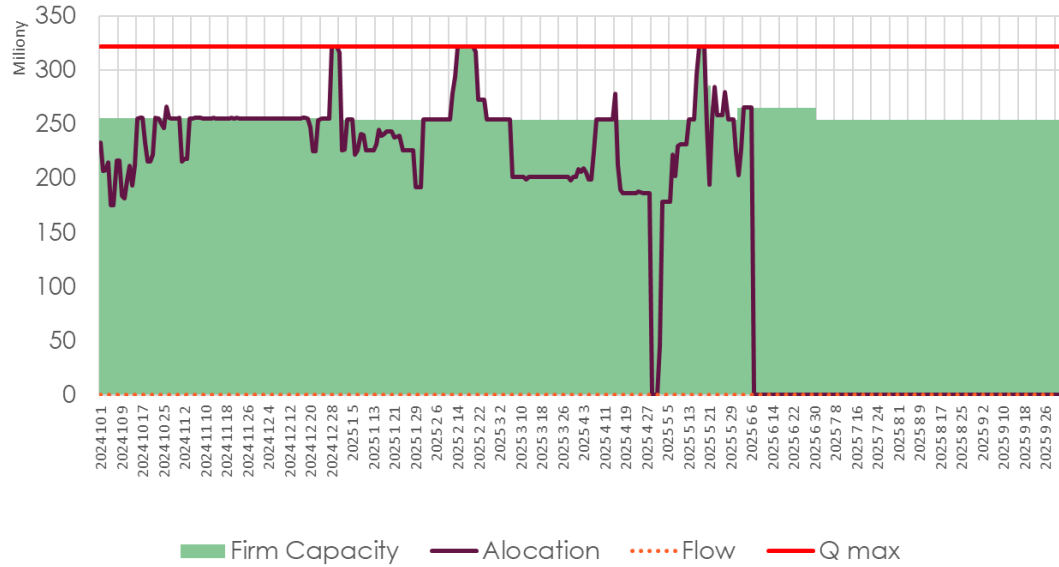
POLAND-LITHUANIA (Santaka)

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

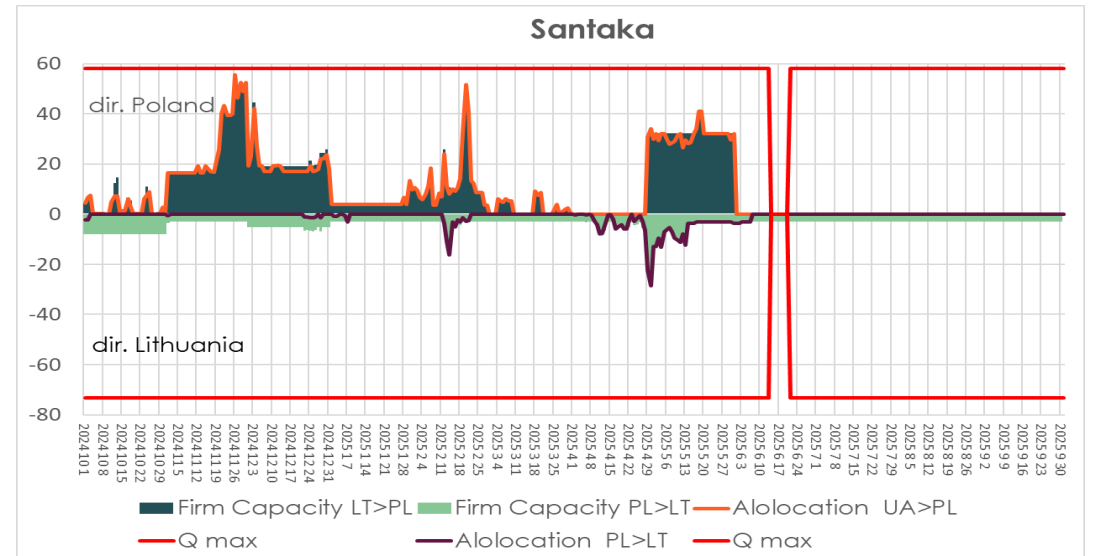


BALTIC SEA GAS CORRIDOR USAGE AND OPPORTUNITIES IN 2024/2025

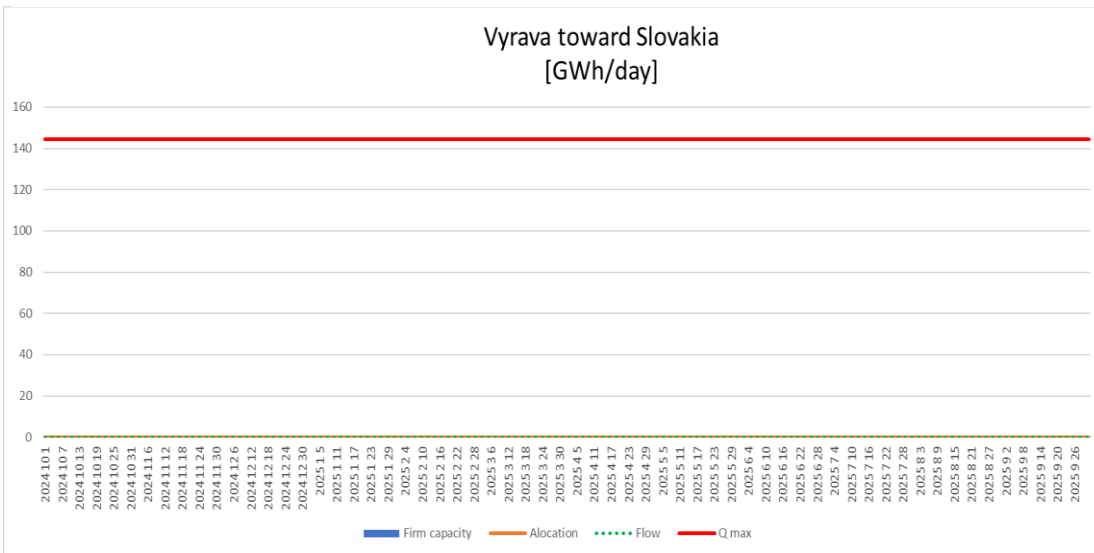
Faxe toward Poland



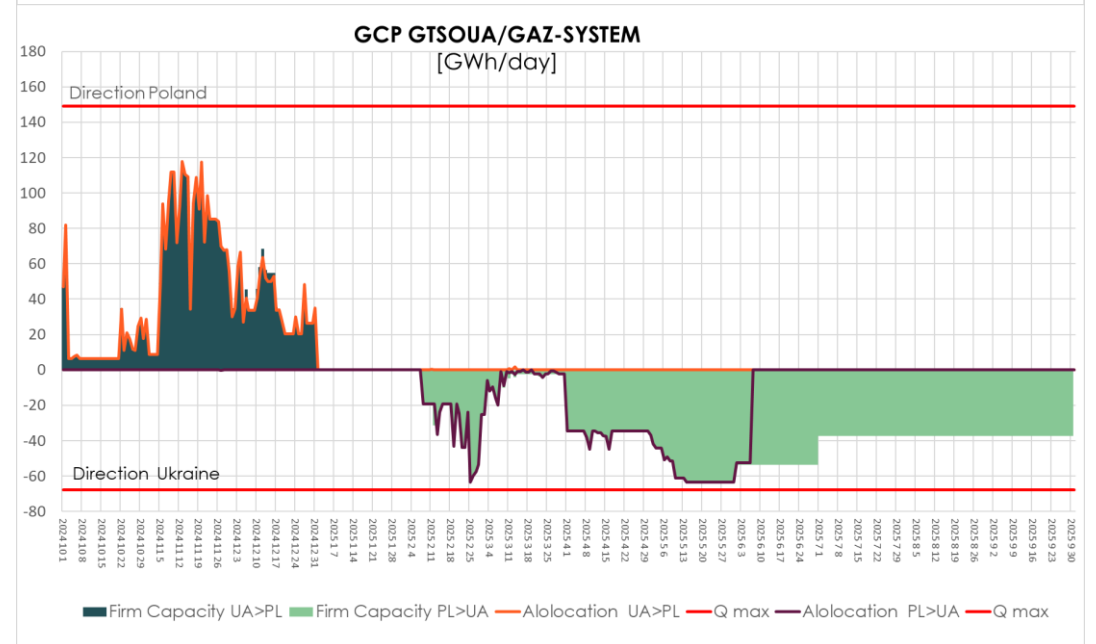
Santaka



Vyrava toward Slovakia [GWh/day]



GCP GTSOU/GAZ-SYSTEM [GWh/day]



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
- ▶ **President of the Energy Regulatory Office approved tariffs for 2026**

BOOKING PLATFORM

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

MANDATORY NATURAL GAS STOCS

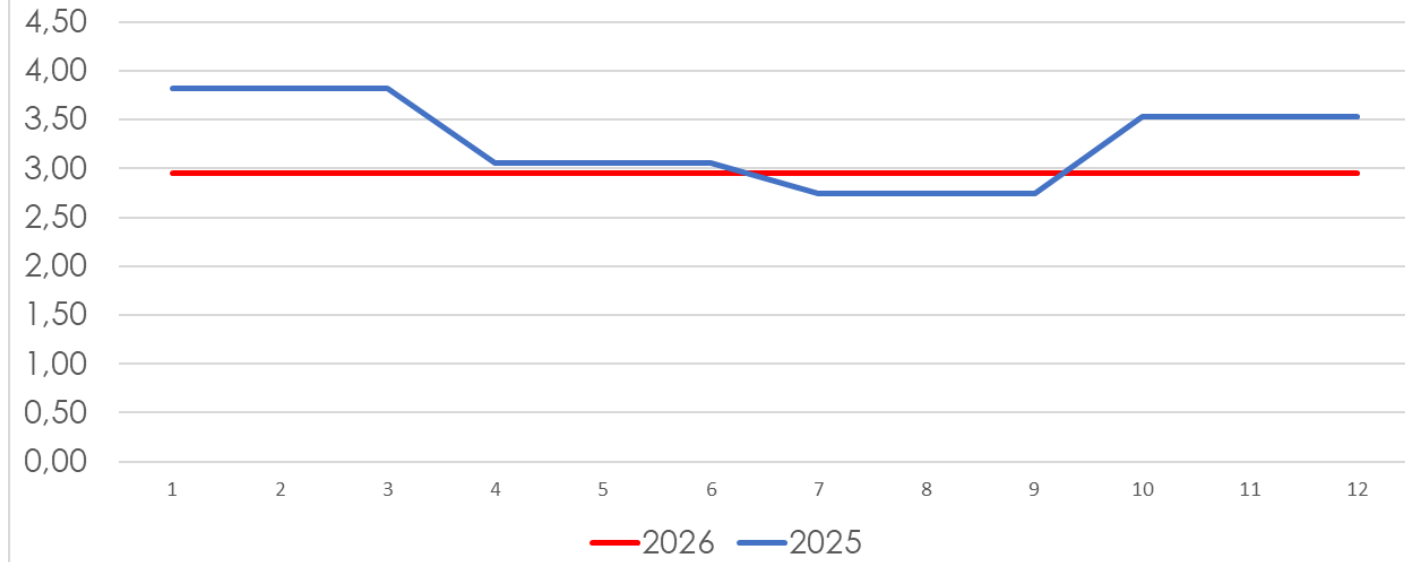
- ▶ Process of changes of law is pending

INCREMENTAL CAPACITY

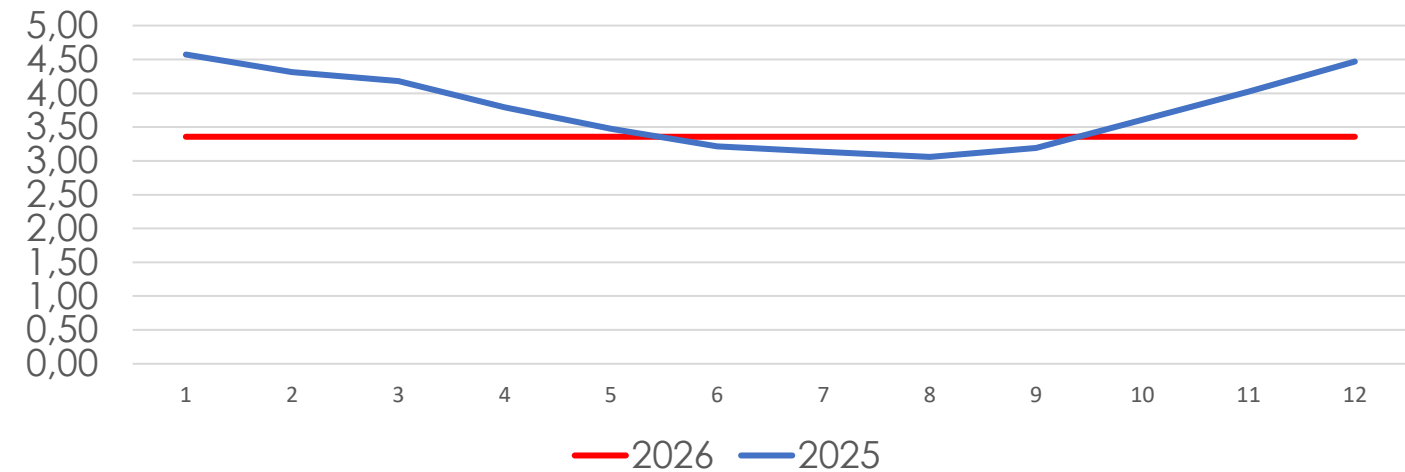
- ▶ Next round of Incremental capacity will be launched in July 2025

New tariffs for 2026

Comparison of **Quarterly Entry+Exit Fee** 2026 vs 2025 rates [EUR/MWh/h/h]



Comparison of **Monthly Entry+Exit Fee** 2026 vs 2025 rates [EUR/MWh/h/h]



INCREMENTAL PROCEDURE 2025-2027 (NON-BINDING PHASE)



Market Demand Assessment

- ❖ GAZ-SYSTEM will conduct **the fifth non-binding market demand assessment** for incremental capacity between the Polish and neighboring transmission systems on the GSA Platform between July 7 and September 1, 2025.
- ❖ The non-binding procedure for assessing market demand will be done through the GSA Platform.

INCREMENTAL PROCEDURE 2025-2027 – STEPS TO BE TAKEN IN 2025



GSA PLATFORM IN NUMBERS

| | |
|--|----------|
| The number of TSOs | 10 |
| The number of LNG Operators | 2 |
| The number of System Users (Shippers) | 197 |
| The number of GSA Platform Users | 645 |
| The number of conducted auctions | 1,01 mln |
| The number of resolved auctions (with capacity sold) | 10500 |
| The highest number of rounds recorded | 49 |
| Maximum number of working days for one auction | 10 |

Data as of 04-06-2025



GAS INSIDE INFORMATION PLATFORM



GIIP offers a service for publishing inside information related to electricity or natural gas markets (the so-called “REMIT inside information”).

The disclosure of REMIT inside information may affect the wholesale price of electricity and natural gas.

What sets us apart?



Versatility – our platform serves both electricity and natural gas markets



Transparency – the published inside information is accessible to all GIIP users at the same time



Compliance – we publish the inside information in compliance with REMIT regulation and ACER requirements

[GIIP \(gasinsideinformationplatform.pl\)](https://gasinsideinformationplatform.pl)

**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