

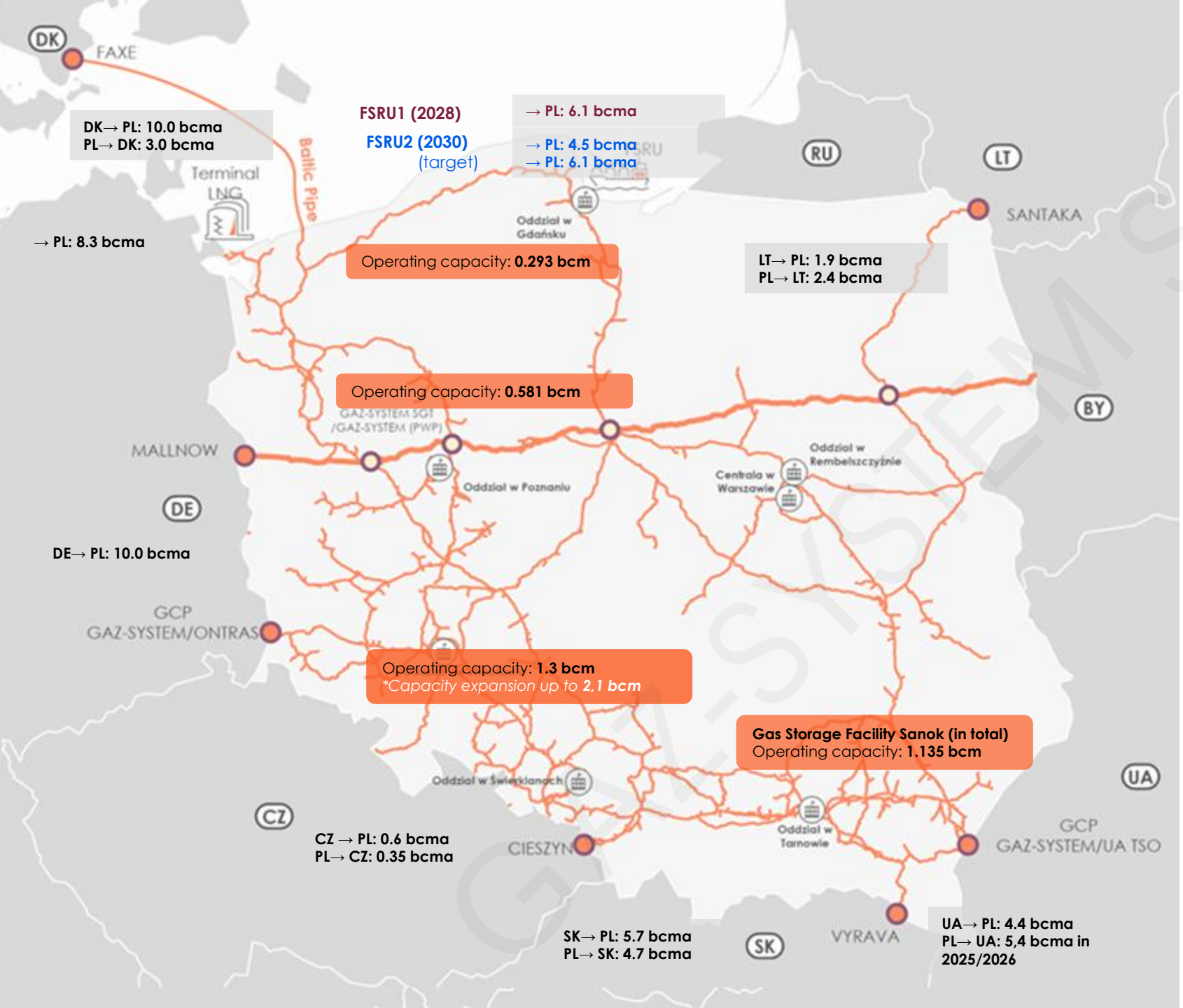
Regional gas market

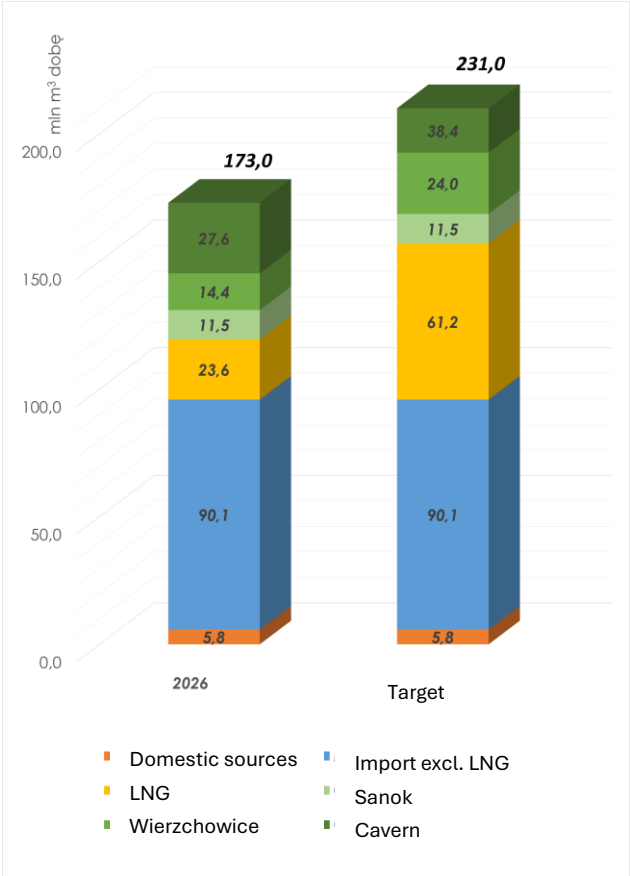
Poland - gas transit hub

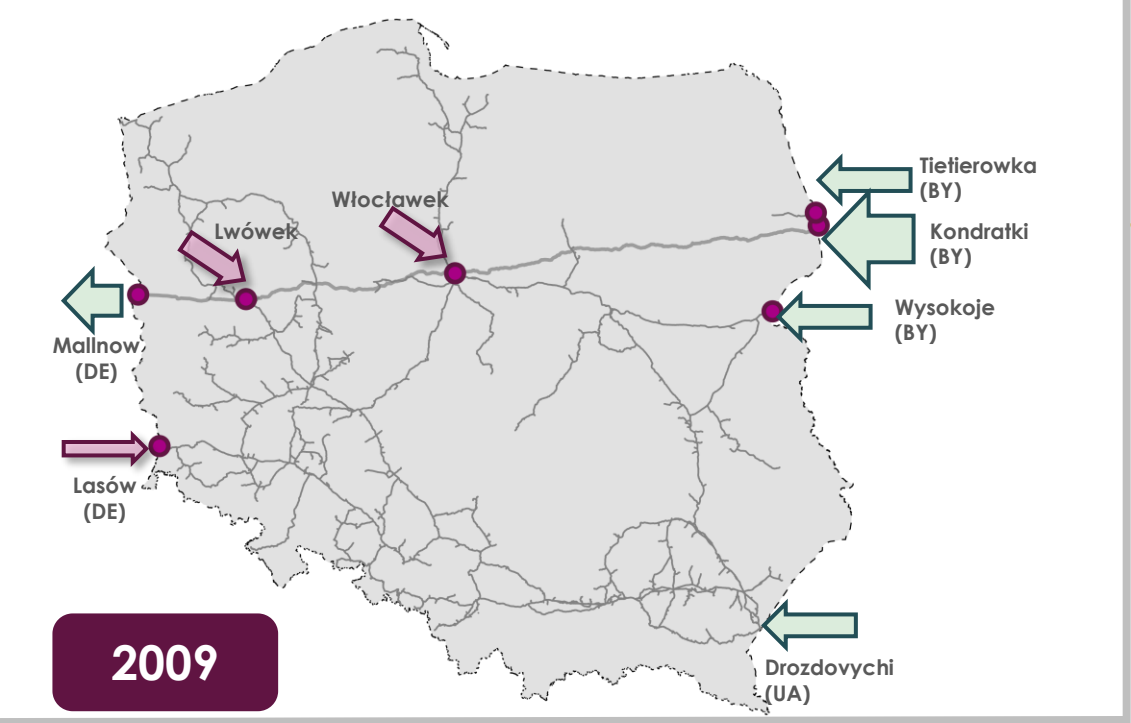
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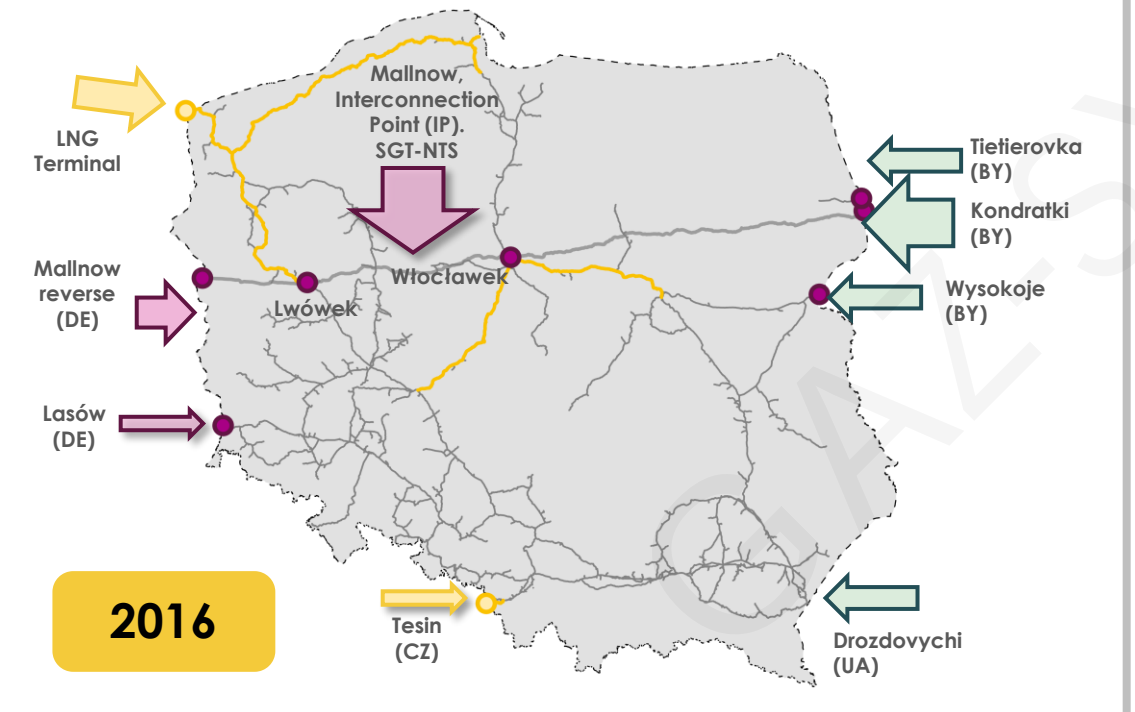
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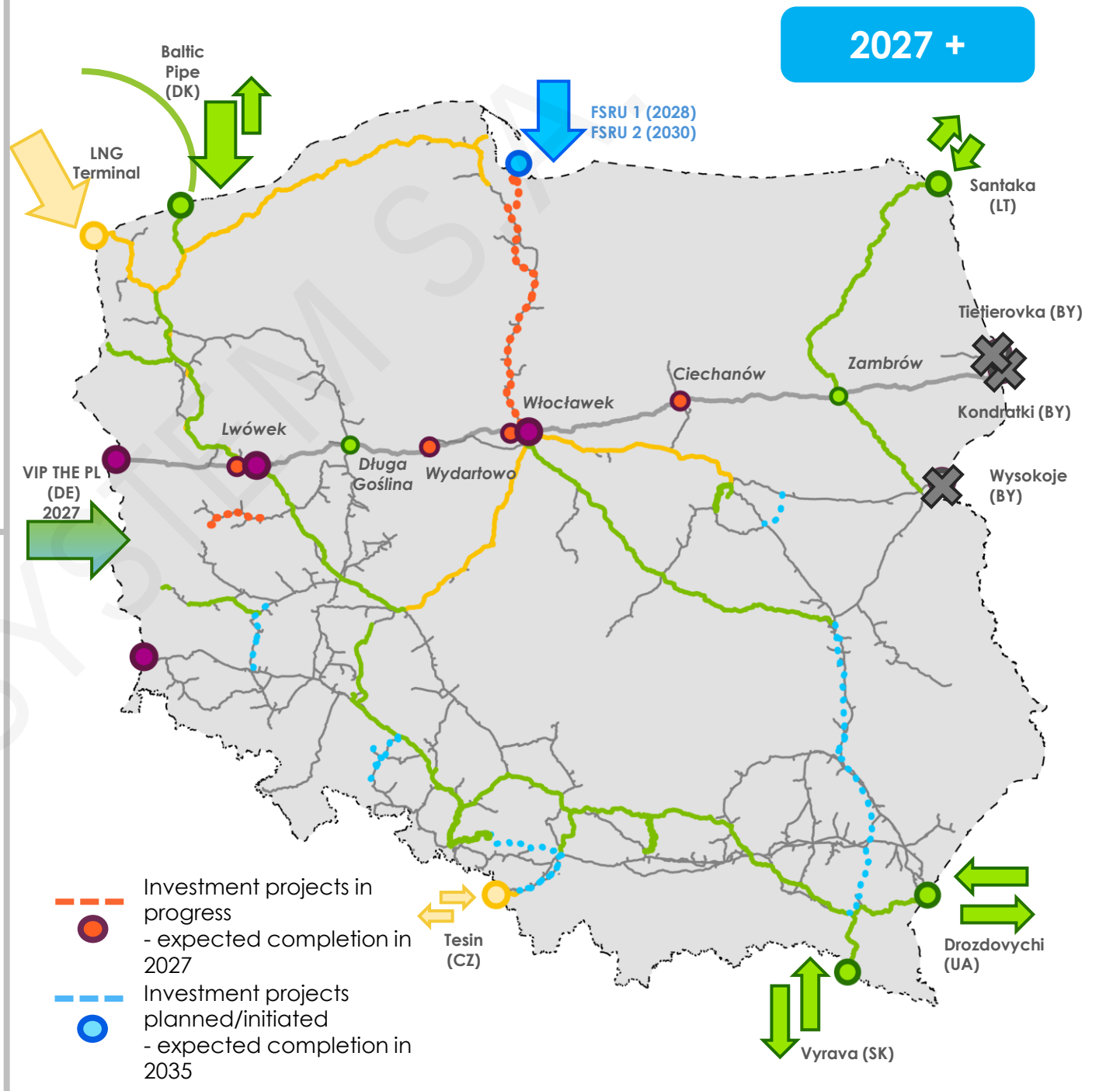
TECHNICAL PARAMETERS OF THE TRANSMISSION SYSTEM



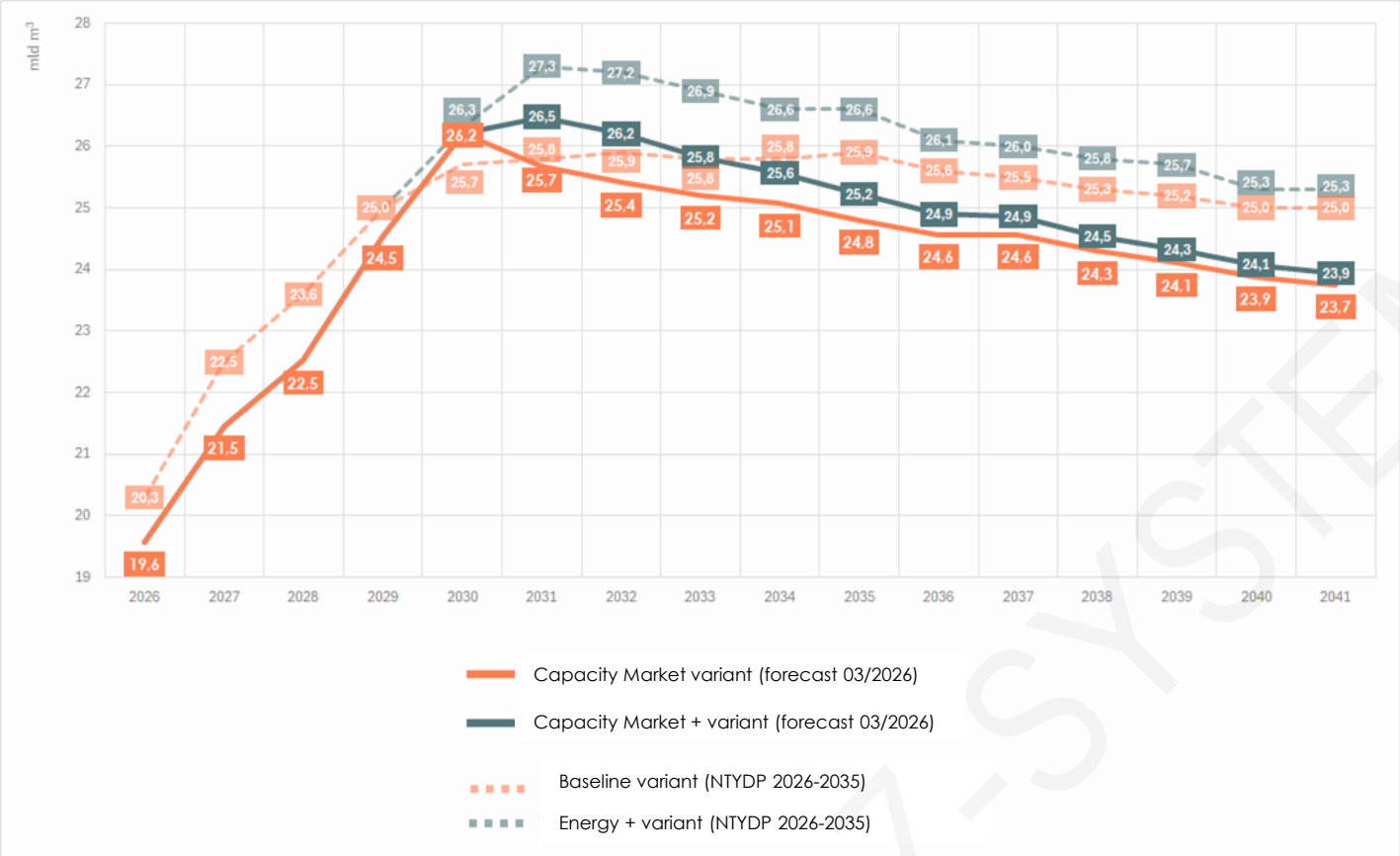


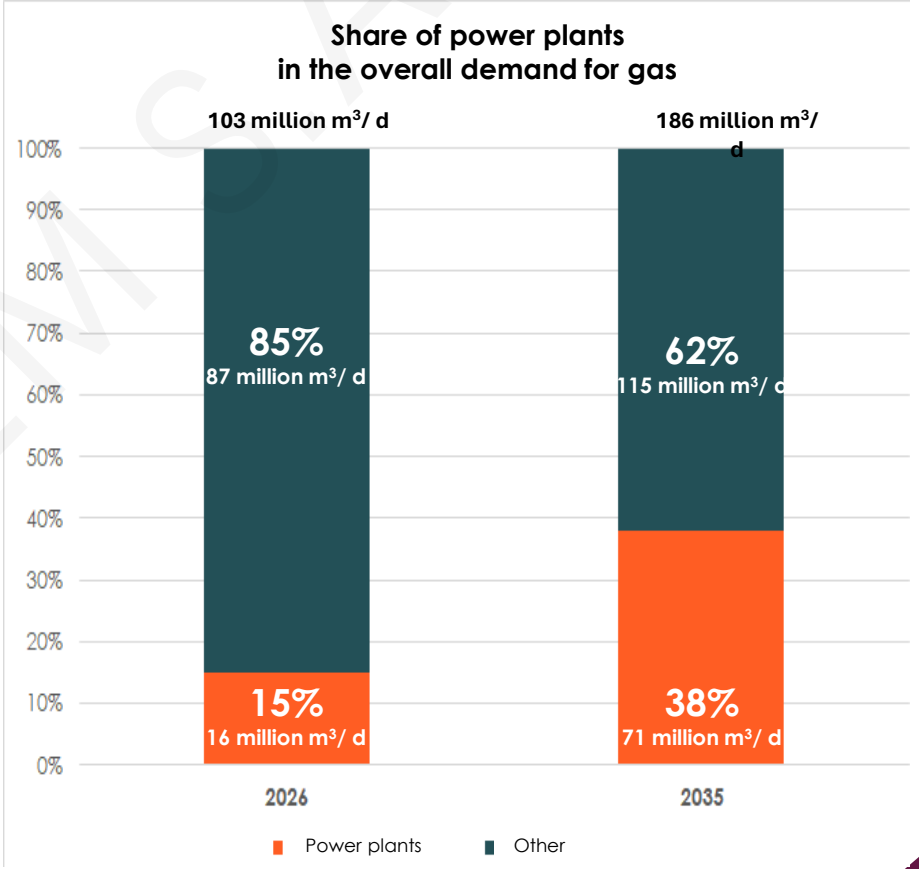

Tietierowka (BY)
Kondratki (BY)
Wysokoje (BY)
Włocławek
Lwówek
Mallnow (DE)
Lasów (DE)
Drozdovychi (UA)
2009


Mallnow, Interconnection Point (IP). SGT-NTS
LNG Terminal
Tietierovka (BY)
Kondratki (BY)
Wysokoje (BY)
Mallnow reverse (DE)
Włocławek
Lwówek
Lasów (DE)
Tesin (CZ)
Drozdovychi (UA)
2016


2027 +
Baltic Pipe (DK)
LNG Terminal
FSRU 1 (2028)
FSRU 2 (2030)
Santaka (LT)
Tietierovka (BY)
Kondratki (BY)
Zambrów
Ciechanów
Włocławek
Lwówek
Długa Goślina
Wydartowo
VIP THE PL (DE) 2027
Wysokoje (BY)
Tesin (CZ)
Drozdovychi (UA)
Vyrava (SK)
Investment projects in progress - expected completion in 2027
Investment projects planned/initiated - expected completion in 2035

DEMAND FOR TRANSMISSION SERVICES / DOMESTIC



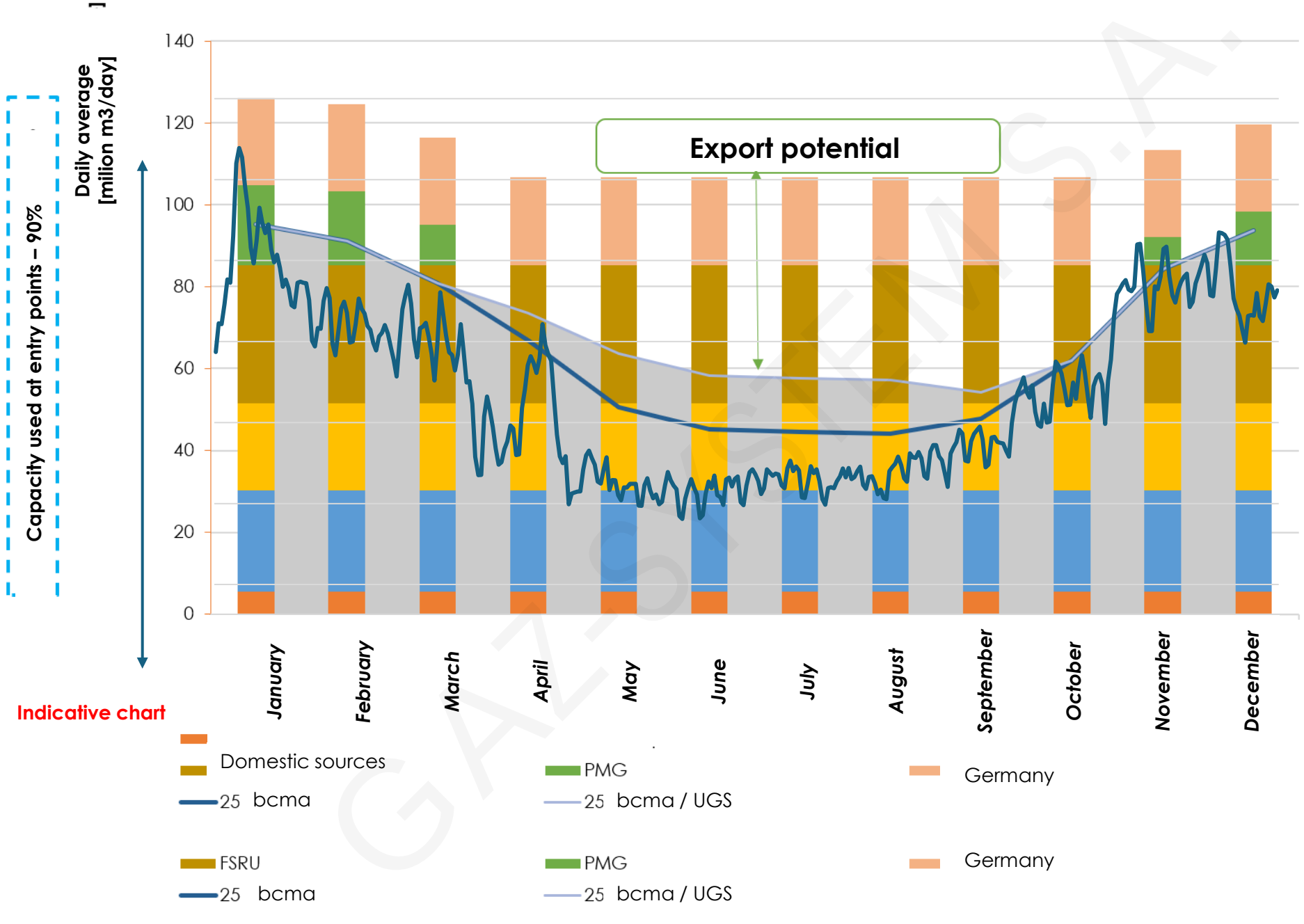


* Power plants and combined heat and power plants

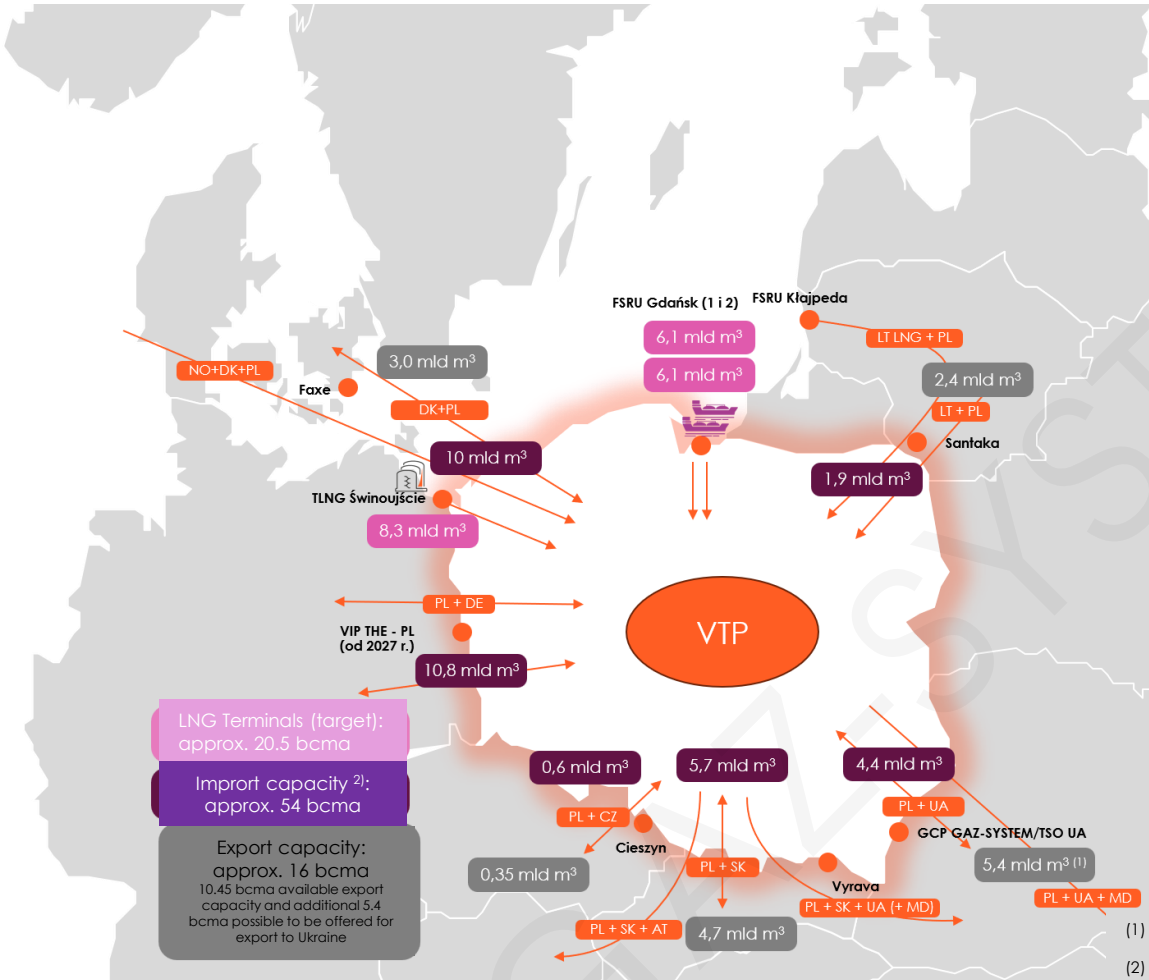
Ultimately, the combined capacity of the onshore LNG Terminal, FSRU I and II, Baltic Pipe, (import from) LT and domestic production will amount to approximately 34 bcma, up to 44 bcma including (import from) Germany;

On a daily basis, taking into account off-take from the UGS, these figures are 168 million m³/day and 196 million m³/day (incl. Germany) respectively.

EXPORT POTENTIAL/CAPACITY SIMULATION



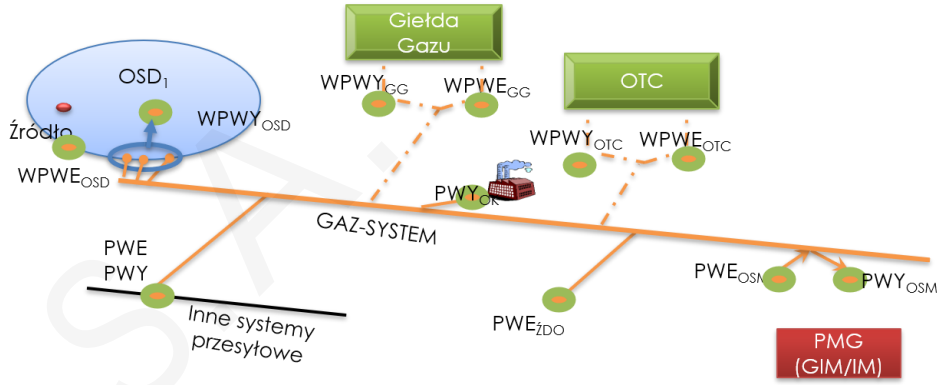
REGIONAL CONTEXT



- Change in market architecture
- Balance between infrastructure development and the projected decline in gas demand in a long-time perspective
- Regional Market Development – alongside infrastructure and the diversification of sources and routes, conditions must be created for efficient trading and transmission over longer distances

(1) Considering temporary increase in capacity up yo 5.4 bcm in 2025-2026
(2) including regasification capacity of LNG terminals (20.5 bcm)

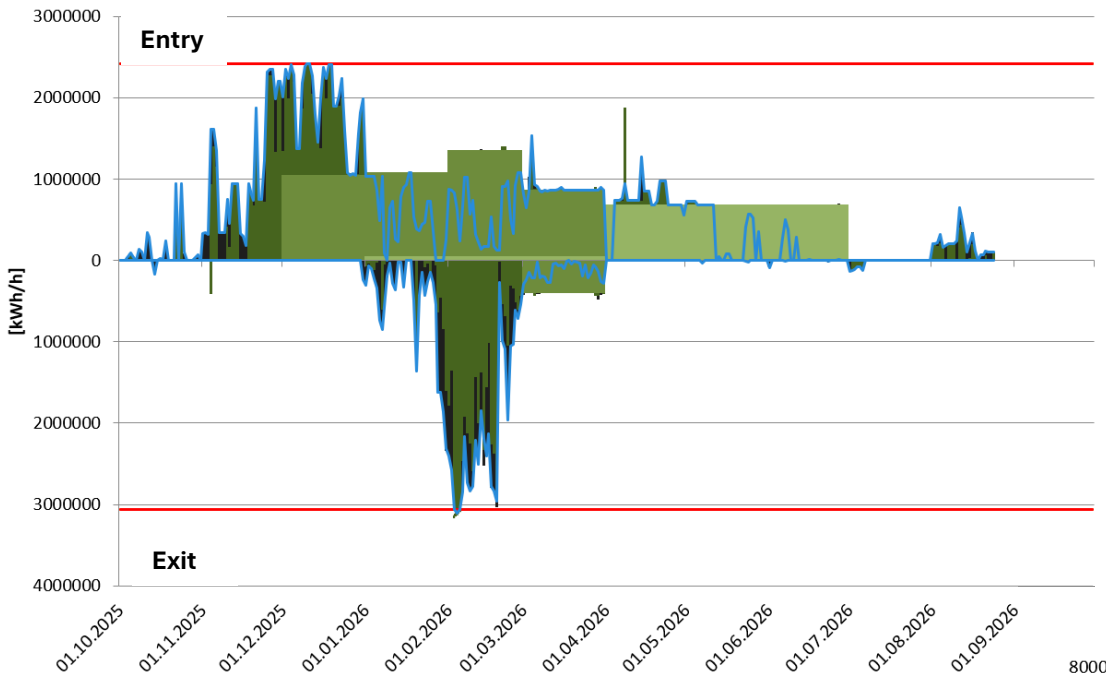
FORMAL REQUIREMENTS IN THE CONTEXT OF VARIOUS SCENARIOS FOR THE OPERATIONS OF SHIPPERS WITHIN THE TRANSMISSION SYSTEM



Operations in the transmission system	License	Inventory
Fuel transit through the territory of the Republic of Poland (balanced IP only)	No licence required – based on a declaration only.	x
Trading on the gas exchange (virtual GE entry/exit)	OPG licence (for trade in gaseous fuels)	x
Trading on the OTC market (virtual OTC entry/exit)		x
Importing fuel from abroad + selling fuel	OPG licence (for trade in gaseous fuels) + OGZ license (for trade in gaseous fuels with foreign countries)	√
Purchasing fuel + transporting it abroad		x
(at any entry/exit point)		
Importing fuel from abroad + selling fuel on the Commodity Exchange		√
Purchasing fuel on the Commodity Exchange + transport abroad		x
Purchasing fuel for own use (any entry point, physical exit point to the domestic operator, virtual exit point to the DSO)	No licence required – based on a declaration only.	With regard to the volume of gas imported from abroad
Delivery of gaseous fuel to a customer on the transmission network (domestic operator) or distribution network (DSO) (not for own use)	OPG licence (for trade in gaseous fuels)	

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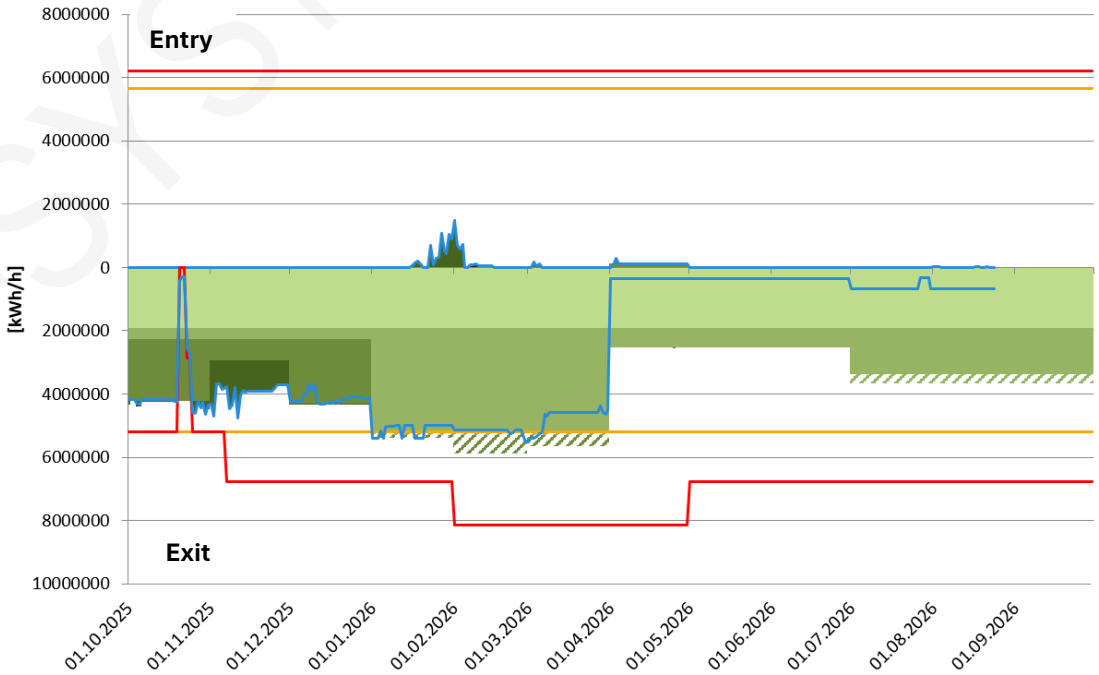
Santaka



Daily (interruptible)
Montly (interruptible)
Quarterly (interruptible)
Yearly (interruptible)
*Intra-day**
Daily
Monthly
Yearly
Technical capacity [kWh/h]
Qmax [kWh/h]
*Used capacity [kWh/h] **

** gas day average value*

GCP GAZ-SYSTEM/UA TSO



Daily (interruptible)
Montly (interruptible)
Quarterly (interruptible)
Yearly (interruptible)
*Intra-day**
Daily
Monthly
Yearly
Technical capacity [kWh/h]
Qmax [kWh/h]
*Used capacity [kWh/h] **

** gas day average value*

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Thank you for your attention

