



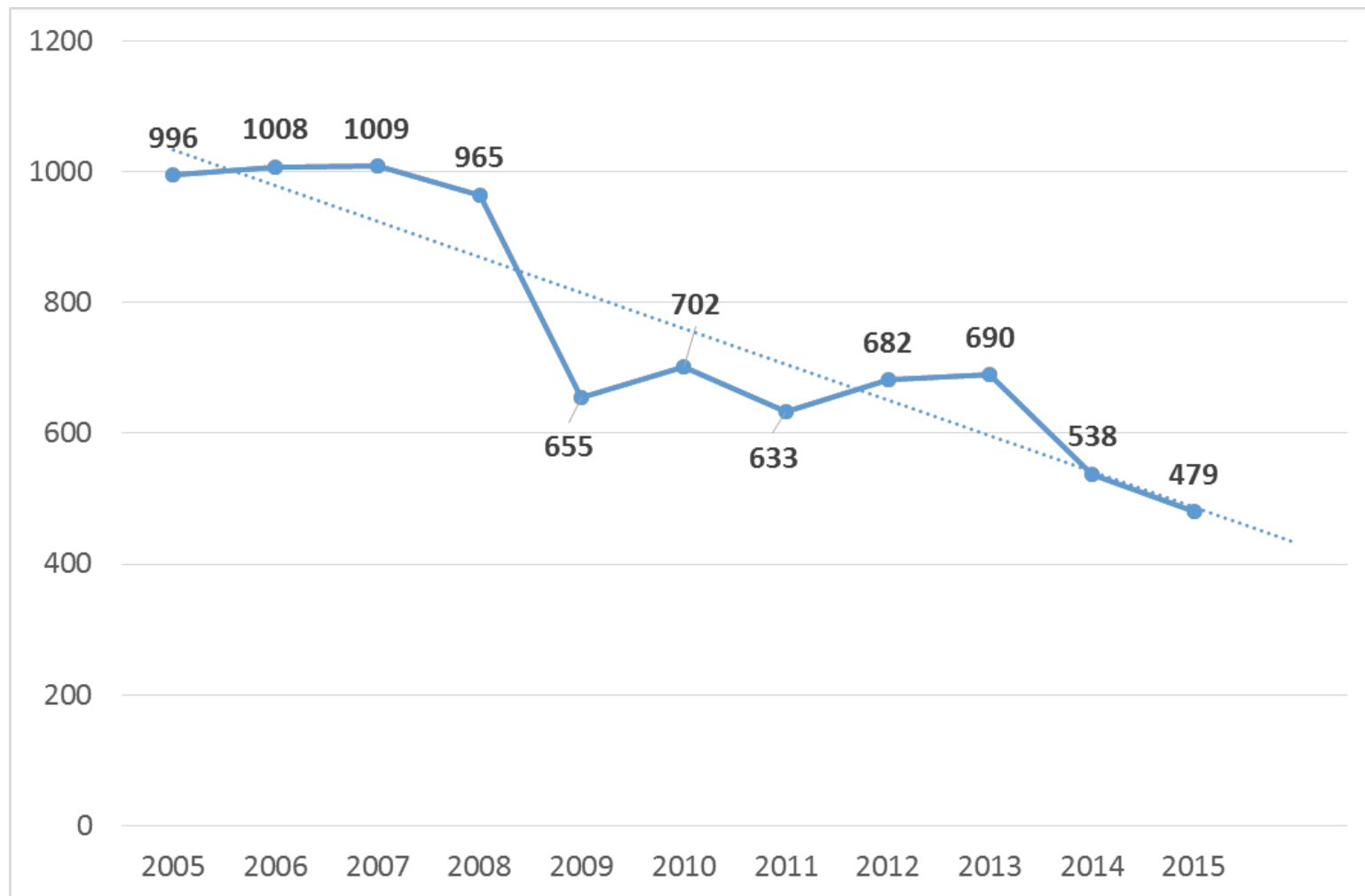
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Latest developments in Estonia

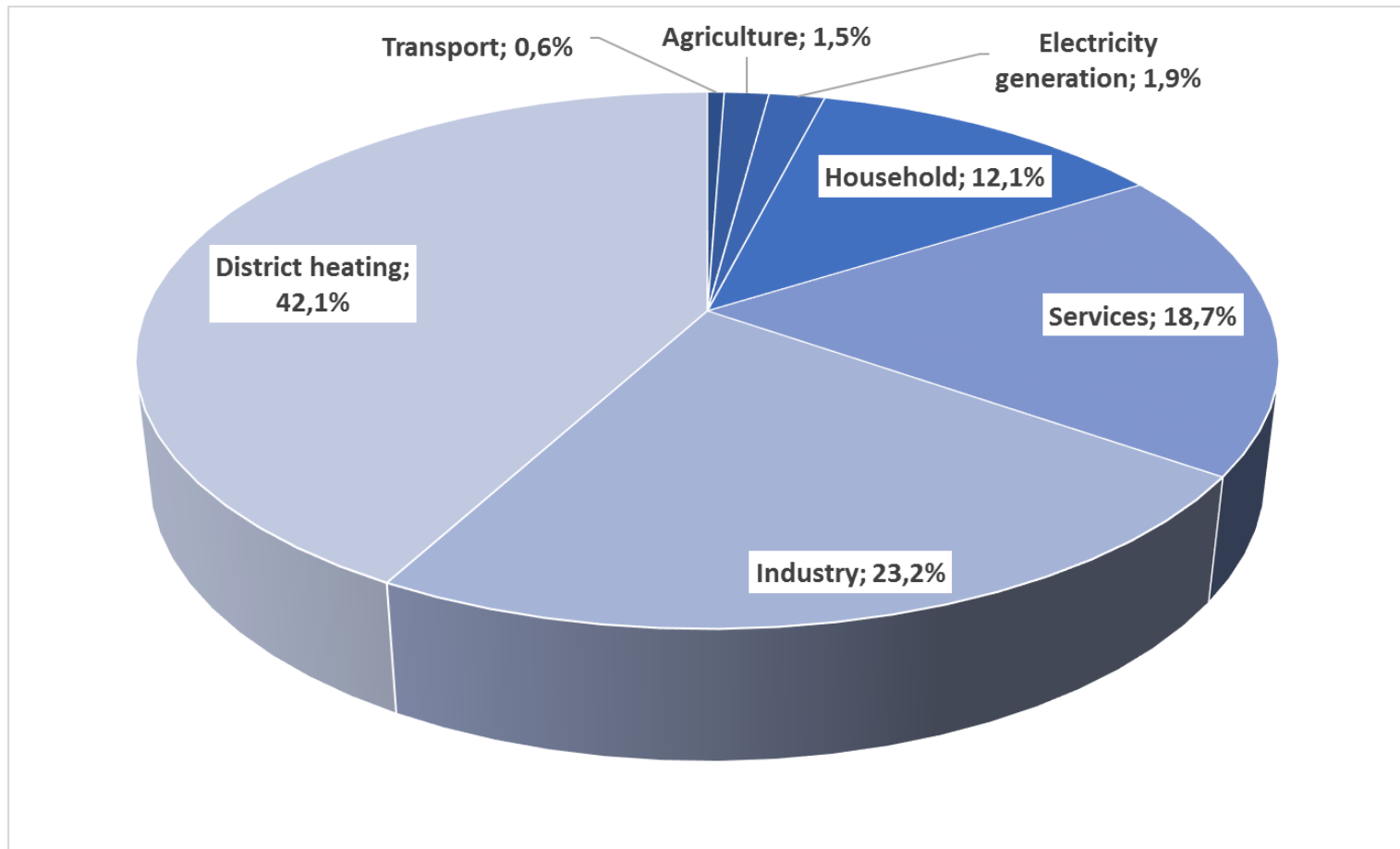
Küllli Haab, Head of Regulatory Division

02.05.2016

Gas consumption is declining

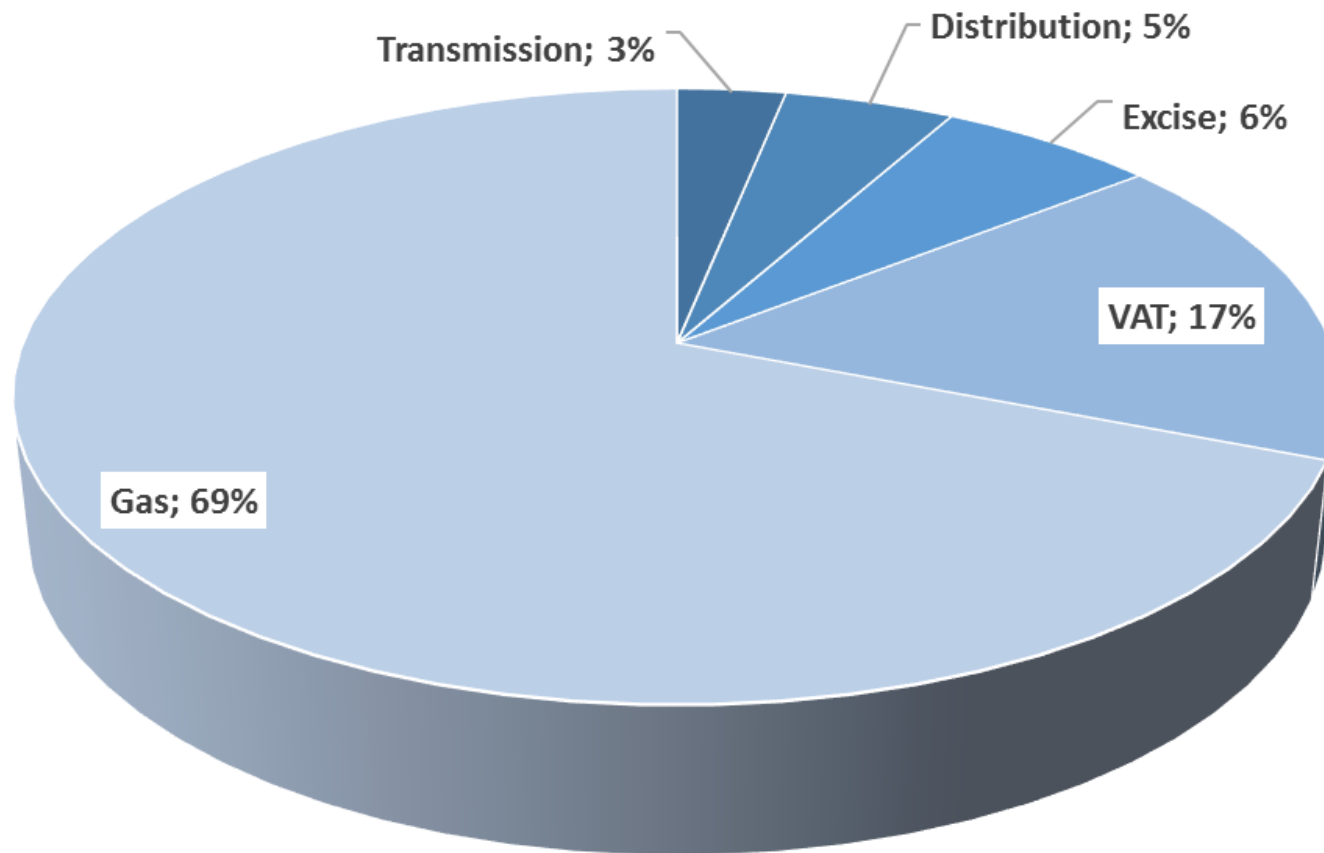


Use of natural gas in 2014

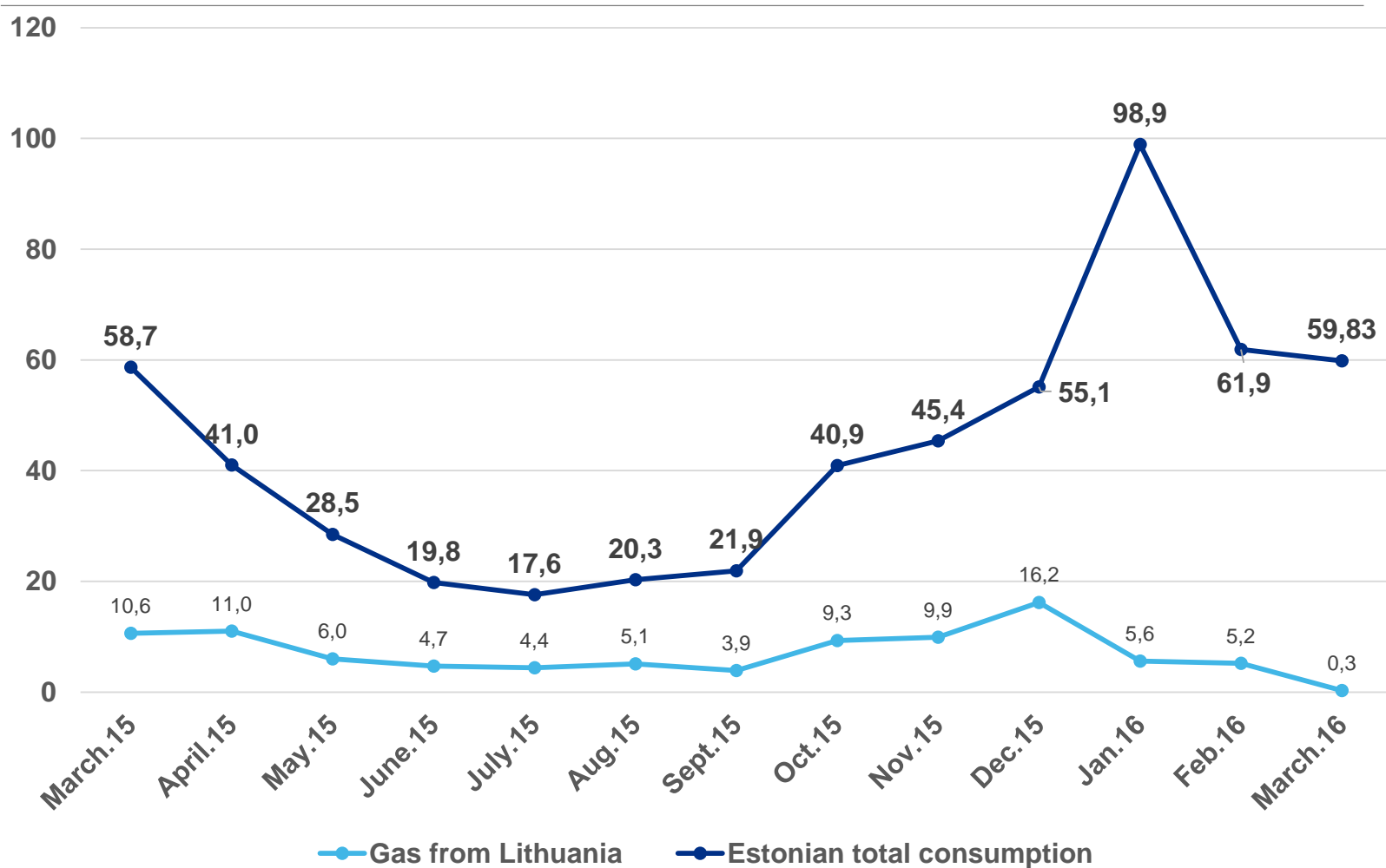


Source: Statistics Estonia

End users gas tariff



Gas import (mln m³)



Market developments

- ❑ 100 % of the Elering AS (power and gas TSO from 01.03.2016) shares owned by Ministry of Economic Affairs and Communications.
- ❑ Balancing Rules for Elering were approved by Estonian Competition Authority in January 2016.
- ❑ Capacity Allocation Rules in progress (final) – we have sent our opinion, comments to Elering and got answers in the middle of April.

Cross border infrastructure

- ❑ Important steps forward concerning integration of gas markets.
 - Lithuania-Poland gas connector (GIPL)
 - Estonia-Finland gas connector (Baltic Connector)
- ❑ Good basis for functioning gas market, new gas suppliers are entering to the market.

Regional Gas Market Coordination

- ❑ Using energy units starting at 2017 – ongoing discussions with network operators.
- ❑ Requirements for issuing gas supply licences in the Baltic States
 - ECA recognize registrations, licences issued in other Baltic States, Poland, Finland
 - Recognition activity licences described in General Part of the Economic Activities Code Act

Future developments

- Data exchange platform.
- Cross-border balancing.
- Introduction of Baltic entry-exit model.
- Common gas exchange market.
- Diversification in source of supply
- Gas supply is not an political issue in the future, good basis for increase of gas in primary energy balance.



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Thank You!

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