

# STATKRAFT

## PRESENCE AND POWER TRADING IN CSEE

Belgrade

June 2017



No. **1** WITHIN RENEWABLES  
IN EUROPE

**90%** RENEWABLE  
ENERGY

**356** POWER AND DISTRICT  
HEATING PLANTS

**35%** OF NORWAY'S  
POWER  
GENERATION

**3200** EMPLOYEES..  
...IN MORE THAN  
**20** COUNTRIES



# THE STATKRAFT GROUP

- ▶ Environment-friendly power generation: 56.3 TWh\*
  - 70% of power generation in Norway
  - 17% of power generation in Europe excluding the Nordic region
  - 9% Sweden
  - 5% of power generation in Europe
- ▶ Production capacity: 18 471 MW
  - 81.0% Hydro
  - 4.0% Wind
  - 14.0% Gas
  - 3.0% district heating
  - 0.2% Solar and bio-fuel
- ▶ 3,200 employees in 23 countries

# POWER GENERATION IN EUROPE

224 hydropower plants in Norway

60 hydropower plants in Sweden

10 hydropower plants in Germany

4 hydropower plants in Finland

3 hydropower plant in Wales UK

2 hydropower plant in Turkey

4 gas power plants in Germany

1 gas power plant in Norway

3 wind farms in Norway

6 wind farms in Sweden

4 wind farms in UK

2 Bio power in Germany



# Power generation in South America, Asia and Africa

- 10 hydro power plants in Brazil
- 3 hydro power plants in Chile
- 1 hydro power plants in Panama
- 1 hydro power plants in Nepal
- 3 hydro power plants in Philippines
- 2 hydro power plants in India
- 2 hydro power plants in Laos
- 2 hydro power plants in Zambia
- 4 wind power plants in Brazil

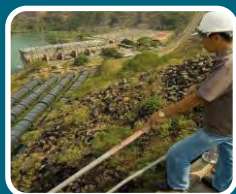
## District Heating

- 27 CCGT in Norway
- 4 CCGT in Sweden

# KEY AREAS



**Flexible European generation and market operations**



**International hydropower**



**Wind power**

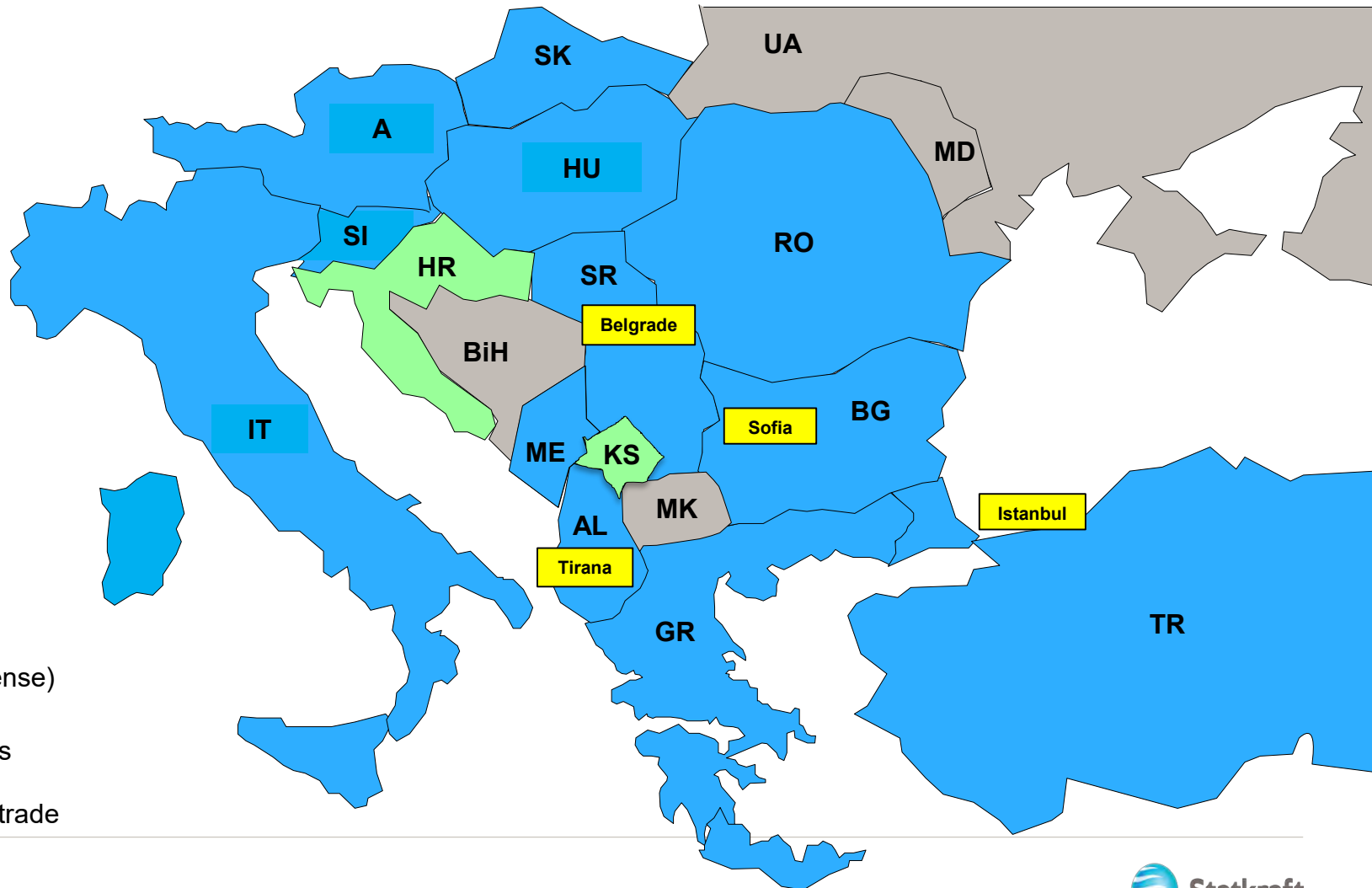


**District heating**



**Regional companies**

# Trading presence and offices in CSEE



# Borders for power trading at CSEE





# ORGANISATION

**Executive Management Team**

**Trading & Continental Operations**

**Trading & Origination**

**Energy Management & Energy Projects**

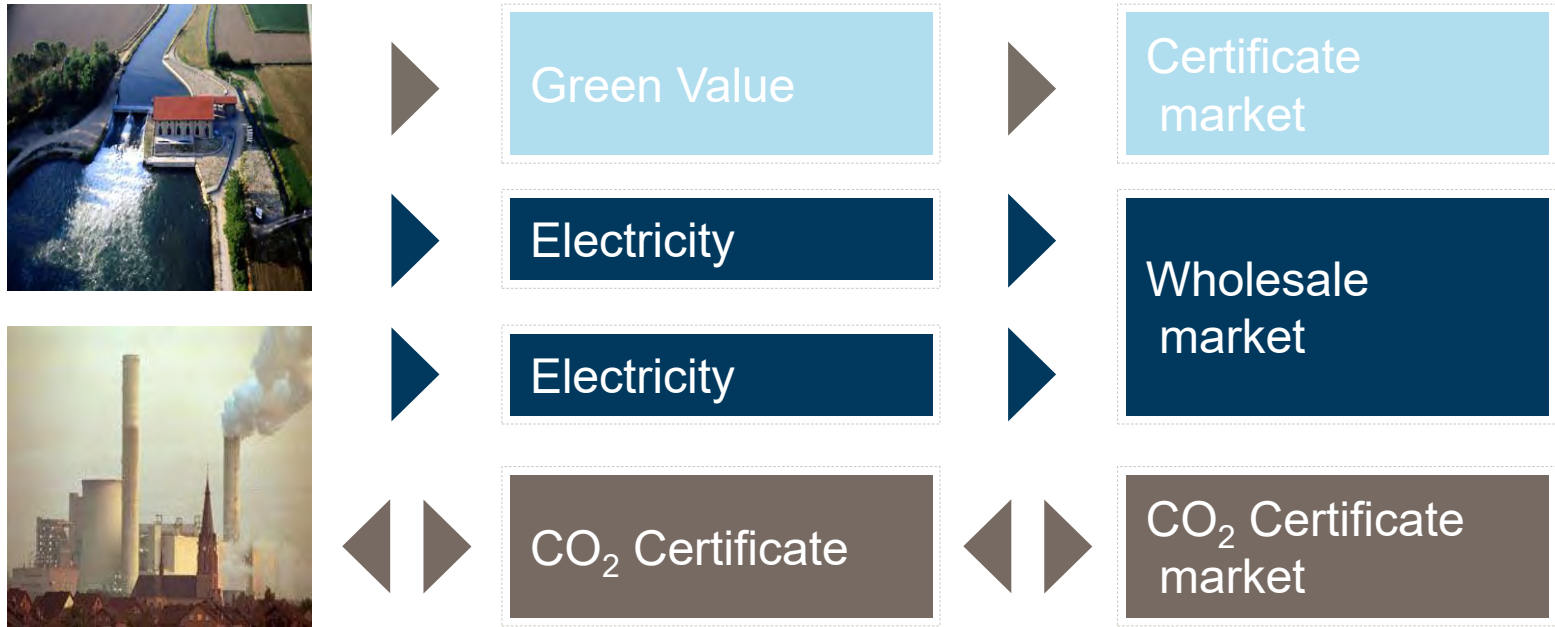
**Energy Management (EM)**  
*Long-term EM*  
*Short-term EM*  
*Short-term EM UK*  
*Biomass*

**Asset Origination**

**Project Development**

**Gas**  
*Balancing*  
*Origination*

# RENEWABLES AND CO<sub>2</sub>



# SERVICES

- > Portfolio and risk management
- > Commercial plant dispatch / optimization
- > Valuation of existing and planned assets
- > Development of procurement strategies
- > Implementation of backup-power strategies
- > Consulting regarding organisational problems
- > Fuel Procurement
- > Certain access to all EU and Non-EU Markets

# BUSINESS MODEL TRADING

- ▶ Day-ahead and longterm x-border
- ▶ Speculative trading
- ▶ Service and Execution for internal and external counterparts (market access, transit, CO2,...)
- ▶ Structured deliveries
- ▶ Longterm PPAs / Wind PPAs
- ▶ Prerequisites for this?
  - Liquid spot markets?
  - Liquid term markets?
- ▶ **Copy-paste Statkraft's trading model to the emerging power markets of CSEE**

# ALBANIA: DEVOLL PROJECT

## --> Project

- **Concession** from the Republic of Albania to build, own, operate and transfer 3 hydropower plants
- 50:50 joint-venture between EVN AG (Austria) and Statkraft AS (Norway)

## --> Timeline

- Concession effective from April 1, 2009
- Pre-construction phase: 2009-ongoing
- Construction period: 2012-2018\*
- Commercial operation of 1<sup>st</sup> HPP (Banjë) started in 2016
- **Key facts**
- Total installed capacity: 256 MW\*
- Average annual production: 789 GWh\*

## --> Location

- Albania
- Devoll river (~ 70 km south-east of Tirana)



\* Values refer to the final project design and reflect the results of the final feasibility study

# PORTFOLIO IN TURKEY



# SUMMARY

- ▶ There is a global and stable trend for more renewables that makes them play a significant role in their respective markets.
- ▶ Irrespective of how renewables are introduced politically: Integrating renewables into the energy system brings huge changes.
- ▶ More flexible (peaking) capacity is needed. But power prices seem likely to remain low.
- ▶ Harmonization of market rules and integration of markets will be crucial.

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# QUESTIONS?

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