



A view on the SEE gas market

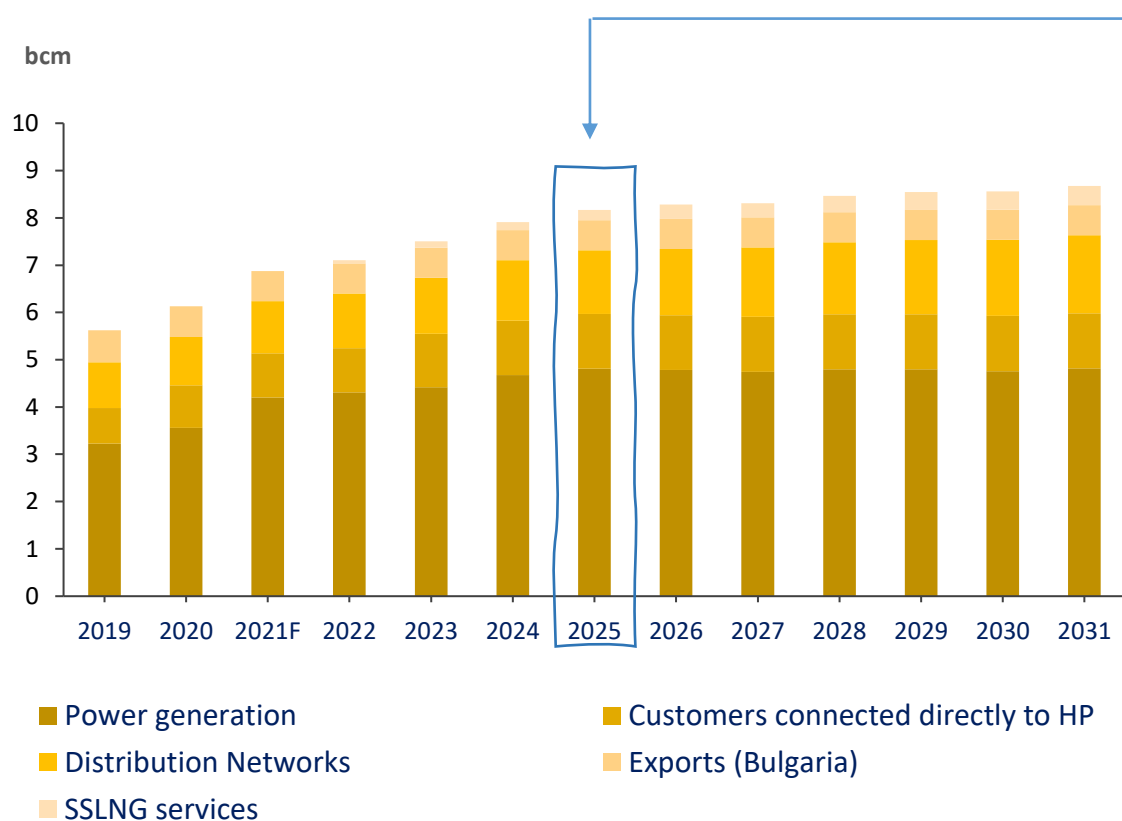
Gerasimos Avlonitis
Market Development Manager

IENE "Energy and Development" | 02.12.2021

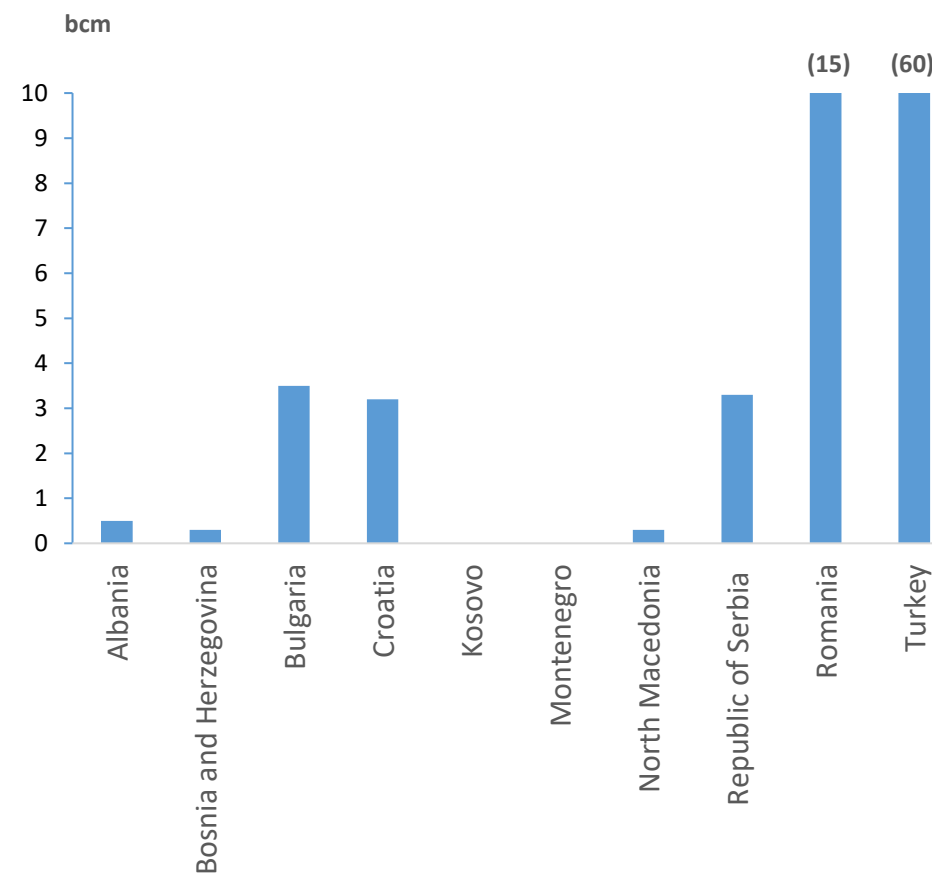
NG demand in Greece expected to increase in the mid-term and be replaced by decarbonized gases in the long run – Same trend expected for the whole SEE



Mid-term natural gas demand forecast in Desfa's system



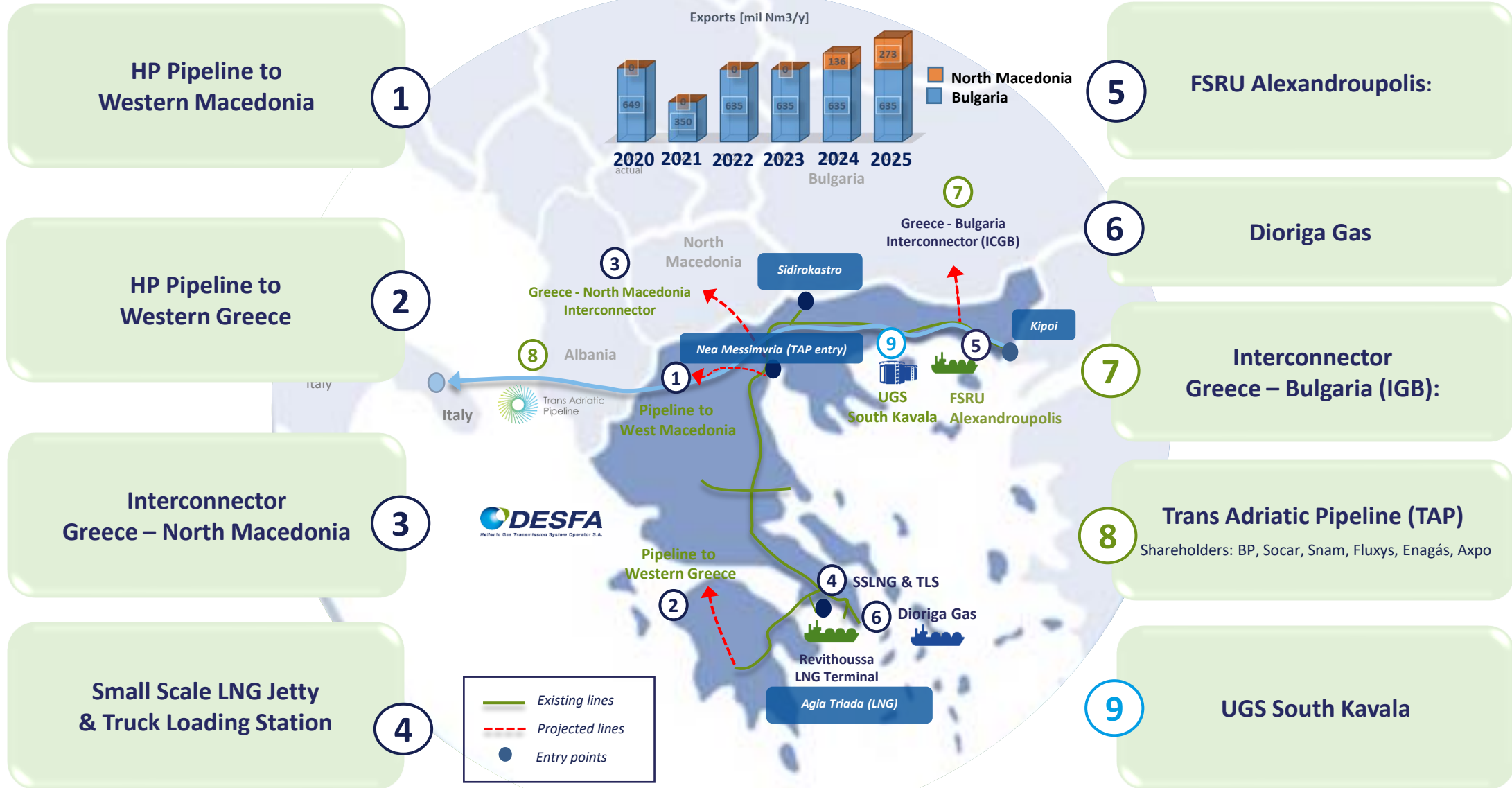
Estimated gas demand forecast in SEE (2025)



DESFA's system is expanding to support the increasing gas needs for Greece and provide diversification and security of supply to the region



DESFA's 10YDP - €500 M within the next 5-year period

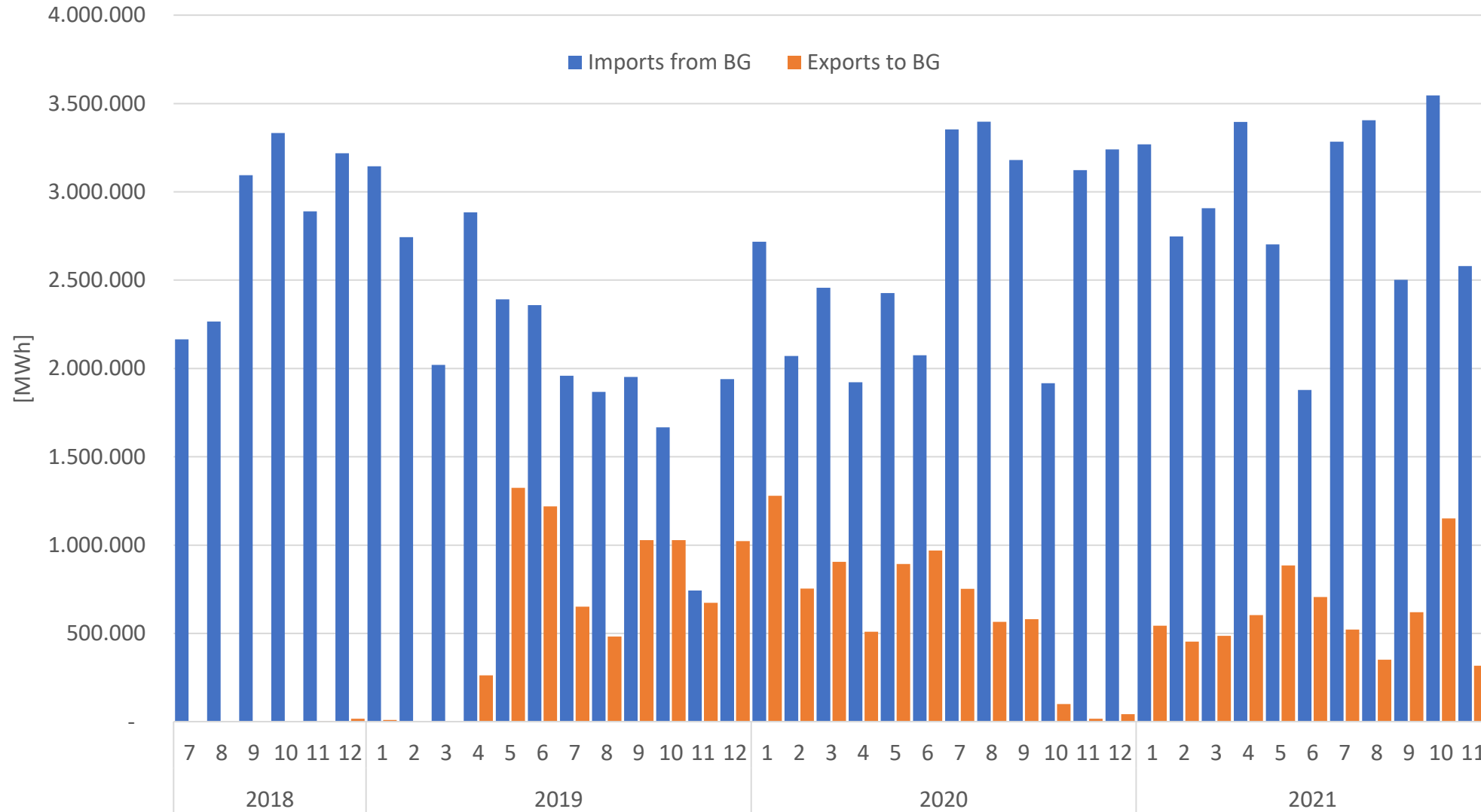


Participations

Other developers

Tender

Gas trading has been established at the Hellenic VTP and cross-border...



...allowing a hub to be created around desfa's infrastructure

HEnEx and desfa's work on the establishment of a gas exchange



desfa/HEnEx Strategic Alliance



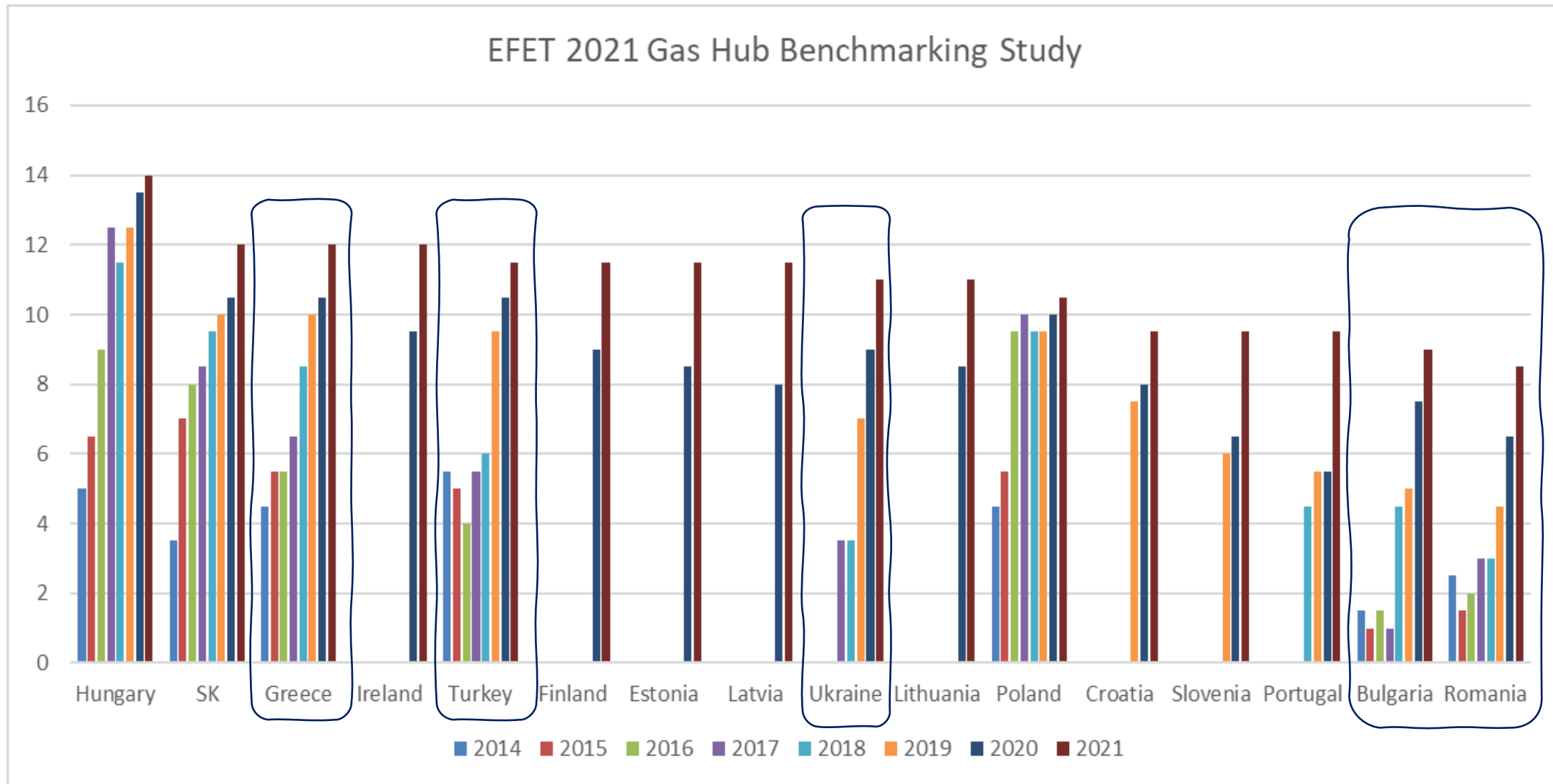
Short to mid-term objective: Developing a functioning wholesale natural gas market that:

- Provides trading options, flexibility and risk management tools...
- ...and reliable price signals...
- ... that promote the use of desfa's infrastructure for cross-border trade...
- ...attracting traders/shippers from the region

Mid to long-term objective: Developing a functioning wholesale renewable gas market and expanding into GOs etc



Gas trading conditions in the whole region are improving...



...and more regional approaches are pursued: South-East and East European Gas Platform (SEEGAS)

- SEEGAS MoU signed between TSOs and exchanges:
- Development of cross-border natural gas trading based on European best practices
- Cooperation on the implementation of an effective commodity clearing system that is in line with best European practices
- Efficient cross-border gas transmission and interoperability where needed



desfa

