



διανομή αερίου
αττικής
ΕΤΑΙΡΕΙΑ ΔΙΑΝΟΜΗΣ ΑΕΡΙΟΥ ΑΤΤΙΚΗΣ Α.Ε.

The role of Attiki Natural Gas Distribution Company in the Transformation of Greek Energy Market

Anastasios Tosios
Commercial Director

6 March 2019

Natural Gas Market | The evolution

1995:
First Gas Law
(Law 2364)

2005:
Liberalization of the natural gas market
establishment of DESFA, the National NG System Operator (Law 3428)

2001:
Establishment of EPAs (Gas Distribution Companies)
DEPA in cooperation with private investors (Shell, ENI)

2017:
Unbundling of Distribution & Supply Companies
Establishment of EDA
Attikis - Eligibility status for large commercial customers

2015:
Full liberalization of the retail NG market
Eligibility status for industrial customers

2018:
Activation of suppliers to retail market
Eligibility status for all the customers

Natural Gas Market | Key players

RAE

An independent administrative authority for the regulation of the electricity and gas markets in Greece in accordance with the provisions of EU Directive 2009/75

Import

International Suppliers

- ✓ Import of n.g. mainly from Gazprom, Sonatrach (LNG) and BOTAS through long-term contracts.
- ✓ Entry points in the country: “Kipoi”, “Sidirokastro”, “Revithoussa” for LNG
- ✓ TAP pipeline is under construction.

Large Importers

- ✓ 3 large importers of n.g. in Greece (DEPA is by far the biggest).

Transmission

National NG System Operator

- ✓ DESFA is the owner and operator of the national natural gas transmission system in the Greek market.
- ✓ It serves retail market gas suppliers as well as its own industrial customers and large electricity producers (DEI, Protergia, Elpedison, Heron)



Distribution

Natural Gas Distributors

- ✓ Establishment of three (3) n.g. distribution companies from January 2017 (full unbundling of distribution & supply operations).



Supply

Suppliers of Gas Retail Market

- ✓ Full liberalization of natural gas retail market from 01.01.2018 for all customer categories (residential, commercial, industrial)

The contribution of the N.G. in the national targets for Energy & Climate

Greenhouse gas emission reductions & environmental targets

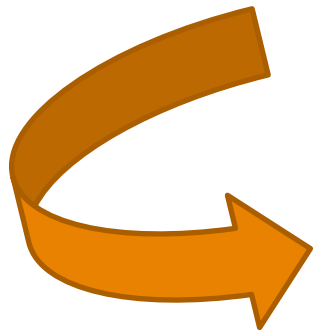
- ✓ Achieving quantified targets to reduce national emissions of specific air pollutants

Increasing RES contribution to energy consumption

- ✓ At least 30% share of RES in gross final energy consumption

Achieve energy savings in final consumption

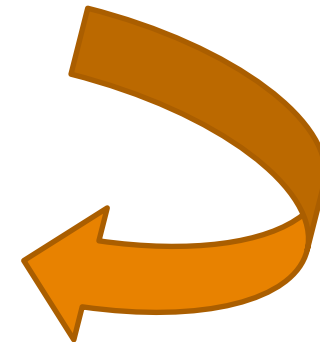
- ✓ At least 7-7.3 Mtoe cumulative energy savings



Change consumption standard & type of fuel consumed to final consumption

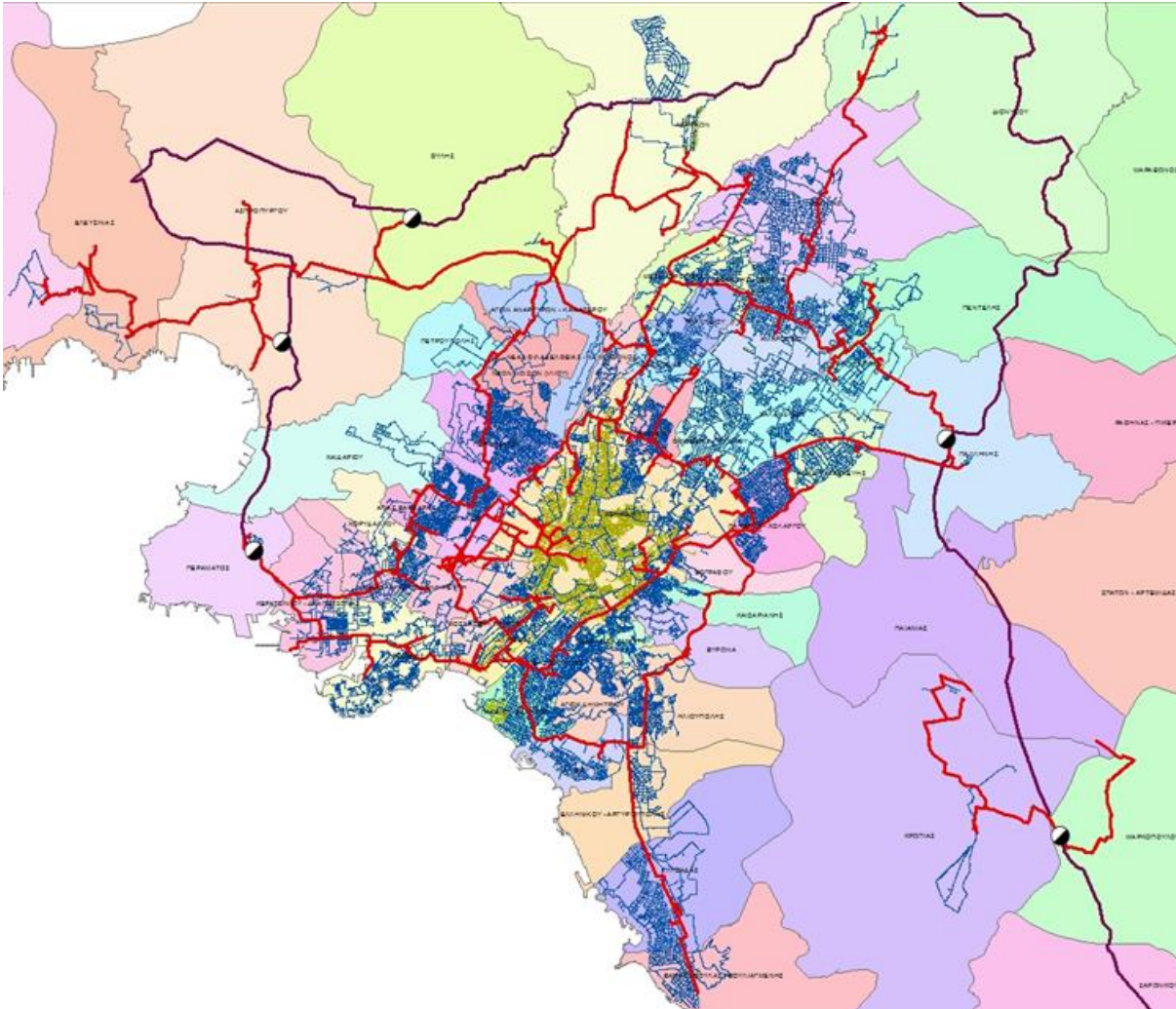


Enlargement of N.G. use in final consumption



EDA Attikis' Objectives for next 5 years

- ✓ **Ensure the smooth, secure, reliable and uninterrupted operation & monitoring of the Distribution Network**
- ✓ **Equal access for the Distribution Network Users Distribution**
- ✓ **Development, inspection, maintenance, replacement and upgrading of the Distribution Network**
- ✓ **Increase usage of natural gas & as a result increase value of distribution network**



5 city gates

329 km medium pressure

3.148 km low pressure

53 municipalities

~74.000 service lines

~120.000 meters

~350.000 households

15 active grid users

Key Operational Results 2017-2018



29.000 new
connection contracts



22% increase in
active customers
(120k vs. 98k meters)



7% penetration increase
(36% vs. 29% in residential sector)



8,7 mil. € subsidy



22,8 mil. € CAPEX
(in network & SL's)



3,5 mil. MWh distribution volume
in 2018 (301 mil. Nm³)

Strategic Pillars & Key Distribution Challenges



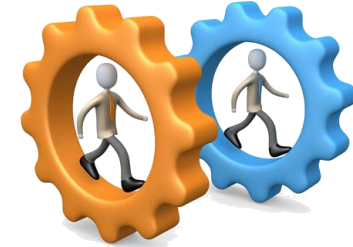
Safety

- ✓ Goal Zero



Sustainable development

- ✓ Increase penetration
- ✓ Fair & equal treatment of network users



Operational excellence

- ✓ Optimization of operations and processes
- ✓ Innovation

Sustainable Development I

Increase Penetration & Distribution Volume



Adoption of **2 fold** strategic approach
over a 7-year period

A

Densification of the existing network

B

Dynamic expansion in existing & new
geographical areas

Increase Penetration & Distribution Volume



Provide consumer incentives that reduce total connection cost & drive gasification

- ✓ Implement an **up to 100% discount** in connection fees
- ✓ Continue **subsidy program** of part of the conversion cost of heating installations
- ✓ Implement **riser** connection method

Increase Penetration & Distribution Volume

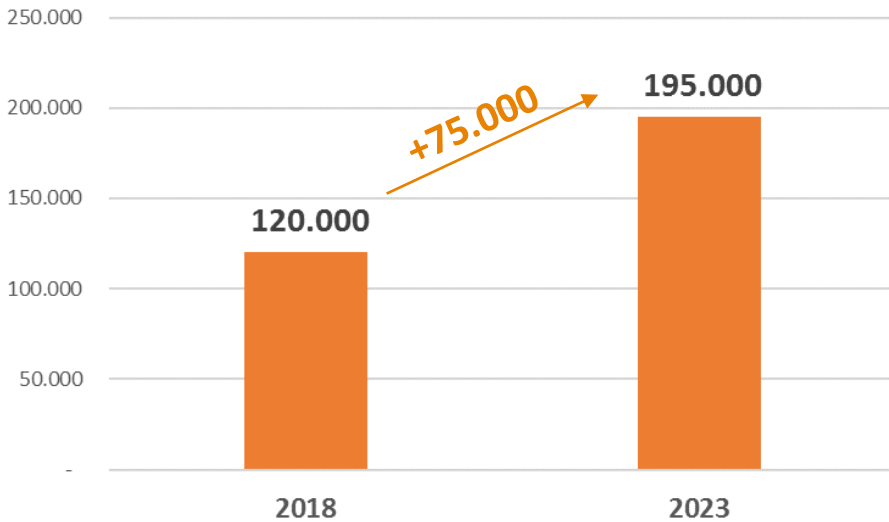


Expand distribution network as to maximize access for households and professionals to N.G.

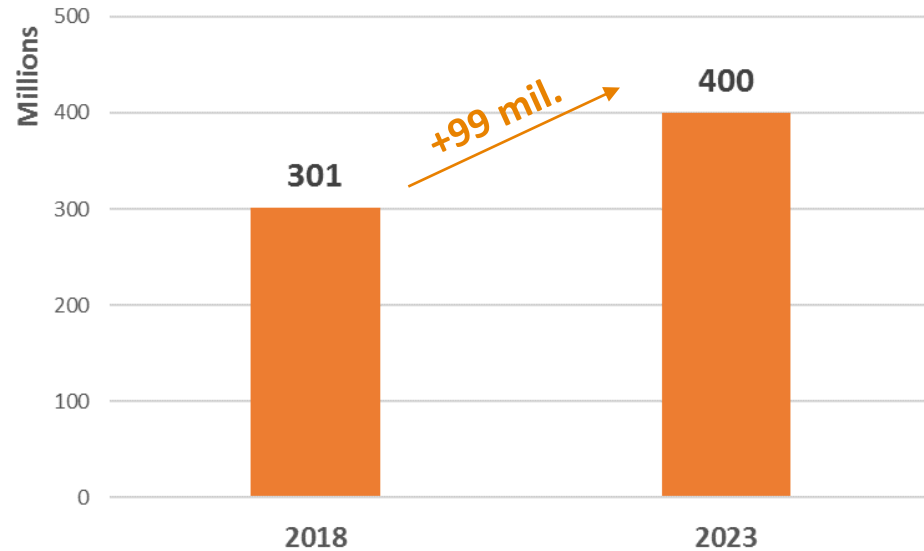
- ✓ Implement a **580km network development** plan within next 5-years in new & existing municipalities

Market & Consumption Evolution

Active Customers



Total Volume (mil. Nm³)





διανομή αερίου
αττικής
ΕΤΑΙΡΕΙΑ ΔΙΑΝΟΜΗΣ ΑΕΡΙΟΥ ΑΤΤΙΚΗΣ Α.Ε.

Thank You!