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Roundtable update

Domestic gas sector in winter 2022/23 with possible 2023/24 outlooks

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ERRA Natural Gas Markets and Economic Regulation Committee

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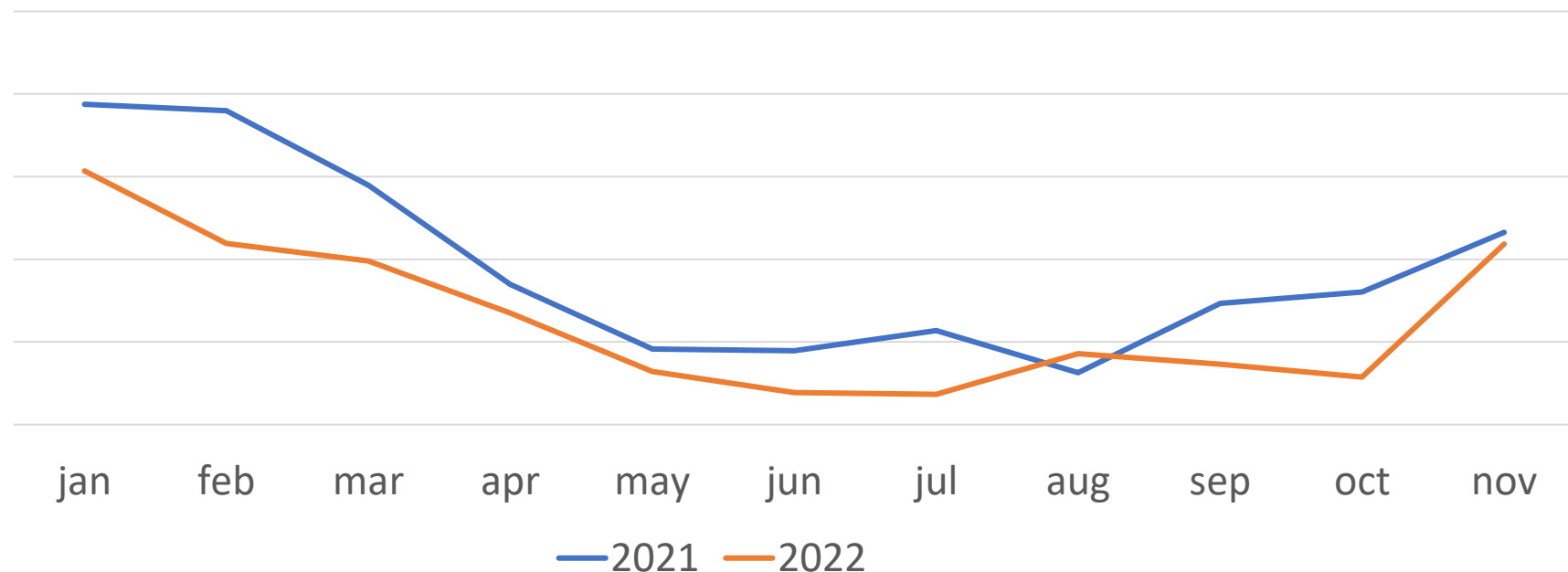
Naturalgas importing countries:

1. In 2022 – LNG from LT and direct deliveries also from RUS. In the Energy law is set that natural gas import/export to Russia is forbidden from 1.january 2023.
2. In December will start work LNG terminal in FIN (Inkoo), start work on capacity reservation rules. Also EE (Paldiski) LNG terminal will be ready to work in December.

Consumption



- No naturalgas consumption limitation set in regulation
- Naturalgas price is main consumption reduction driver
- 2022 (11) compare to 2021 (11) is – 32 %



Storage

- IPGK storage level 58% or 14,34 TWh of storage.
- LV consumption 12,5 TWh.

Tariff/market considerations

- Protection of households – one of the first new government priorities is to set support rules for next year.

Subsidies to natural gas users (use natural gas for house heating). (50% from increase).

- Full gas market open from 1.may.
- Tariff:
 - New end - user tariff from 1.january. Still waiting for
 - New DSO tariff from 1.january- average increase 22%
 - Work on new TSO tariff methodology (NC TAR framework). New tariffs from 1.october 2023



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**THANK YOU
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