



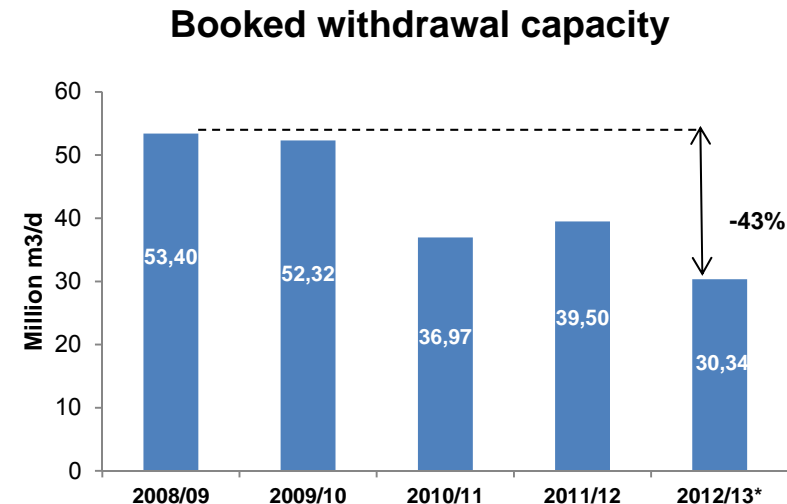
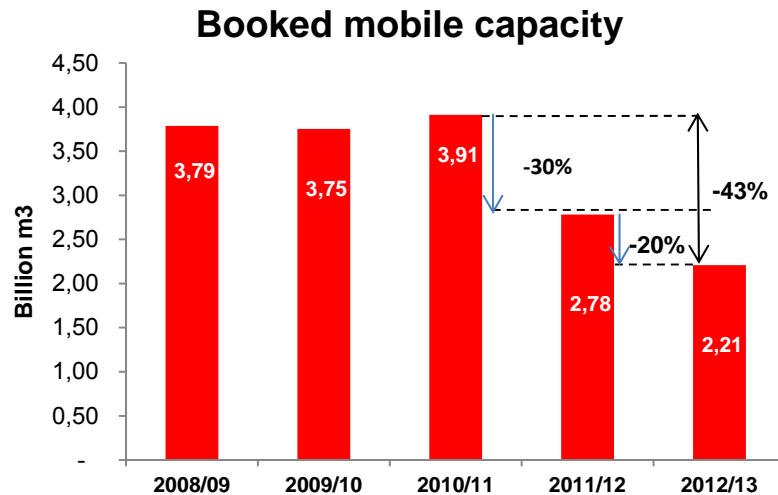
Future Gas Storage Market in Hungary

E.ON Földgáz Storage Zrt.

17th October 2012

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The storage booking level at EFS has changed since 2008



* Booked level on 1st of October 2012

At the end of 2012/13 injection period,
1.7 billion m3 less gas is available in the EFS
storage than in winter of 2010/11.

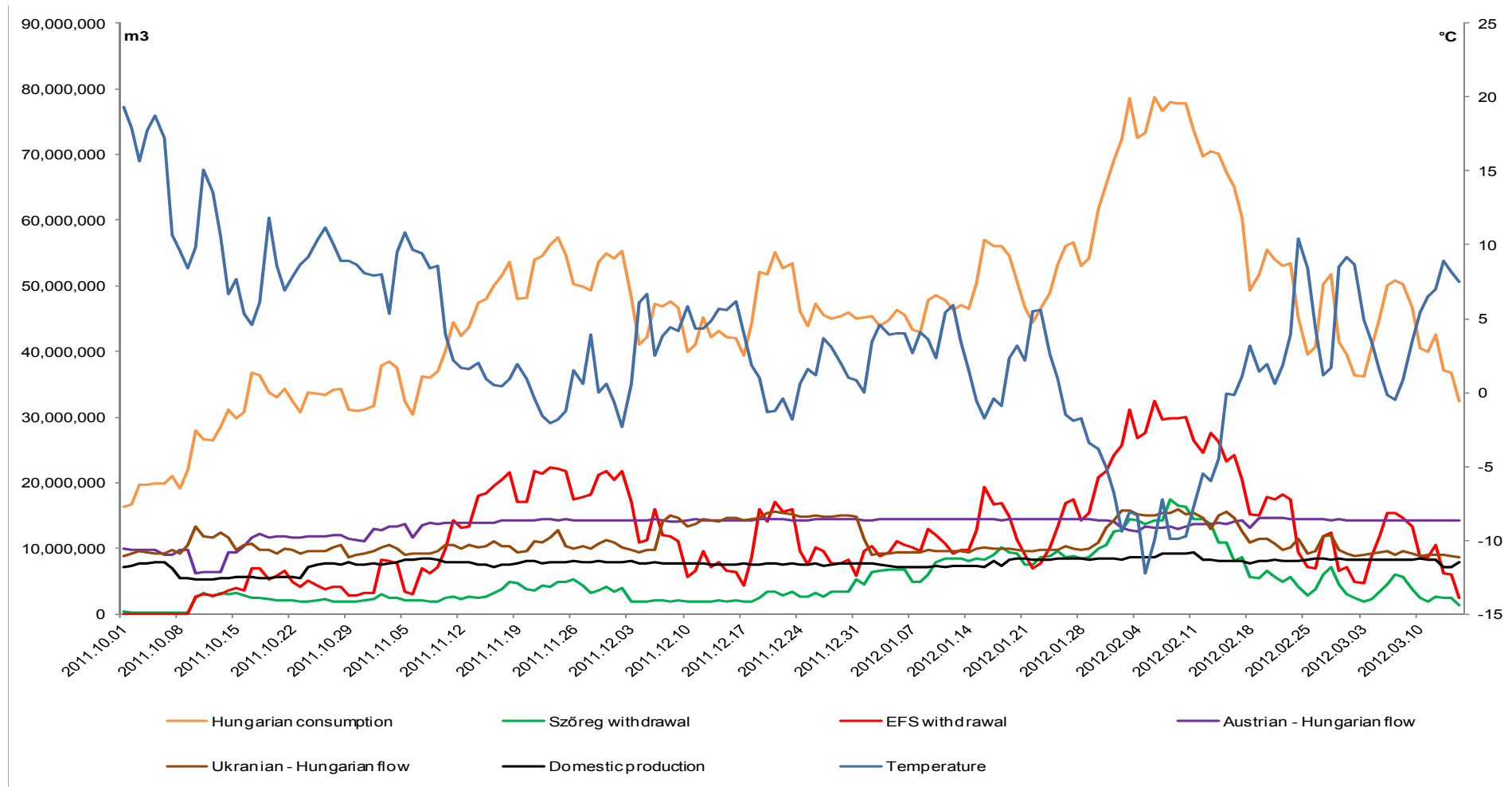
In the winter of 2012/13, the total booked
withdrawal capacity is only **55% of the total**
EFS withdrawal capacity.

The main intention of storage is to increase the utilization rate and
keep it sustainable after 2015.

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In Hungary, the underground gas storage is the main source of flexibility

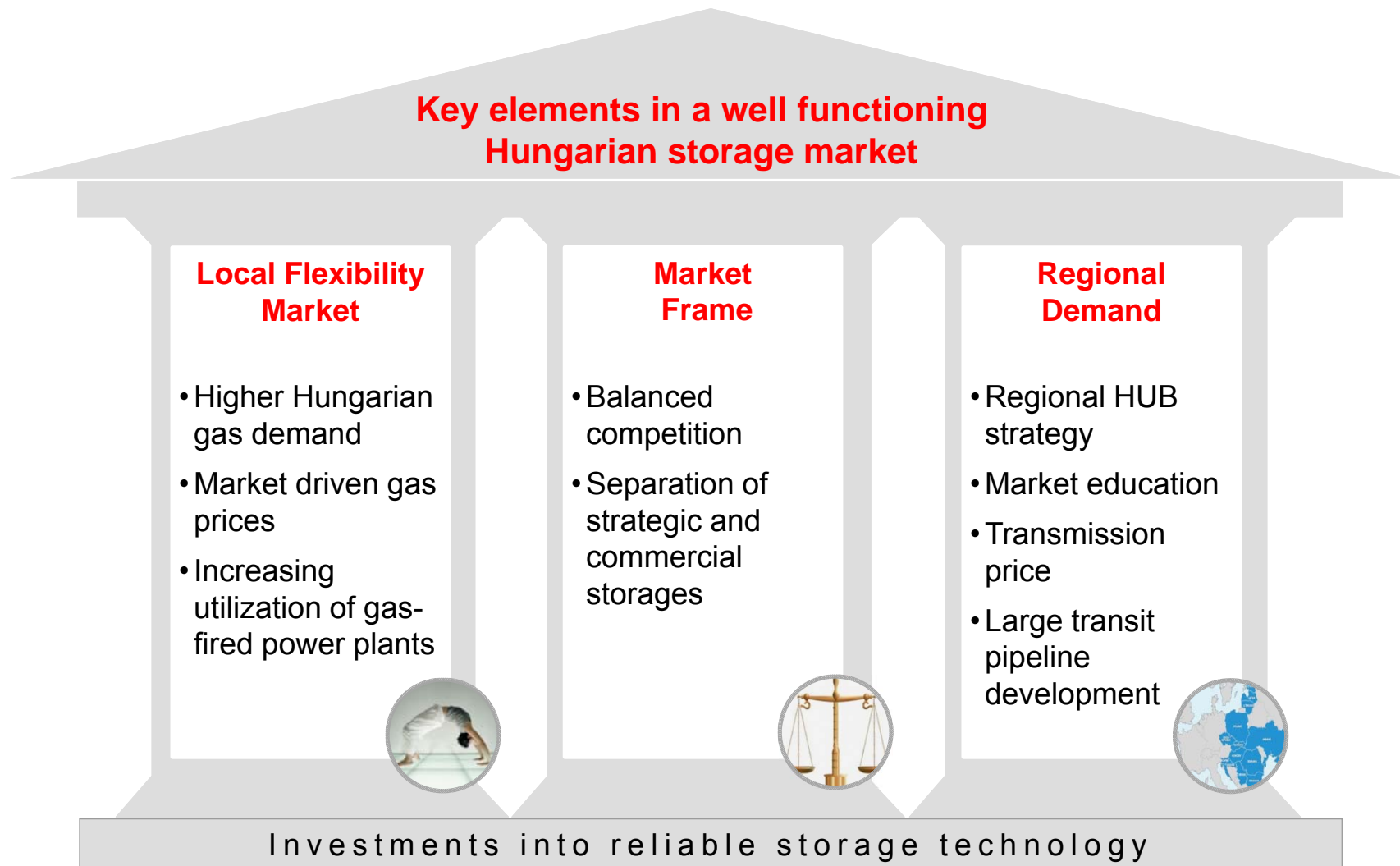
Flexibility on Hungarian gas market during the winter period of 2011/2012



In an opened regional market even more flexibility is needed.

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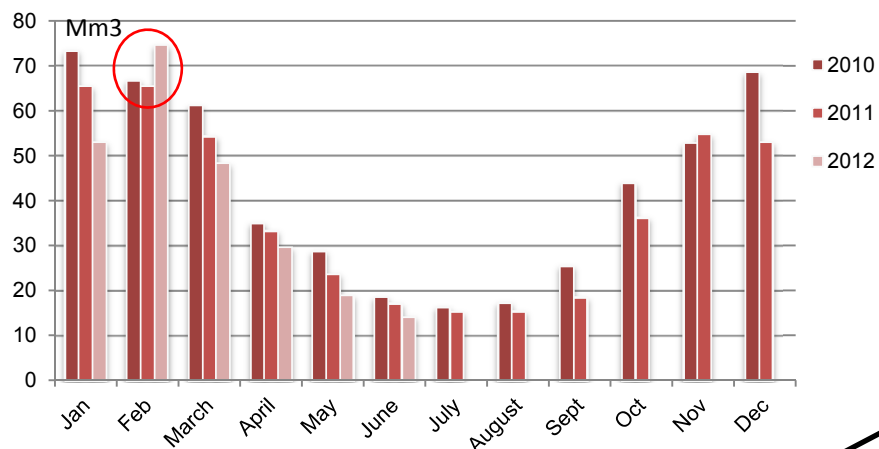
Success of long-term storage strategy requires fundamental market reshape



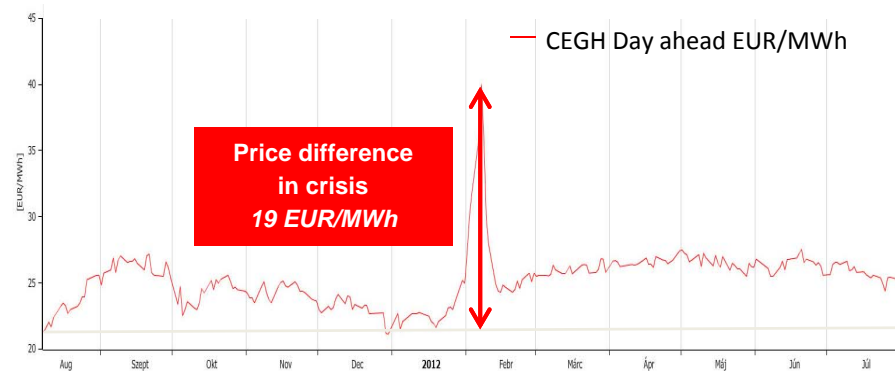
Local storage need is mainly flat also on long-term basis



Daily peak consumption may have decreased to the minimum?



Extreme price differences in critical situations can be balanced by using storage services



Gas-fired power plants should have higher utilization

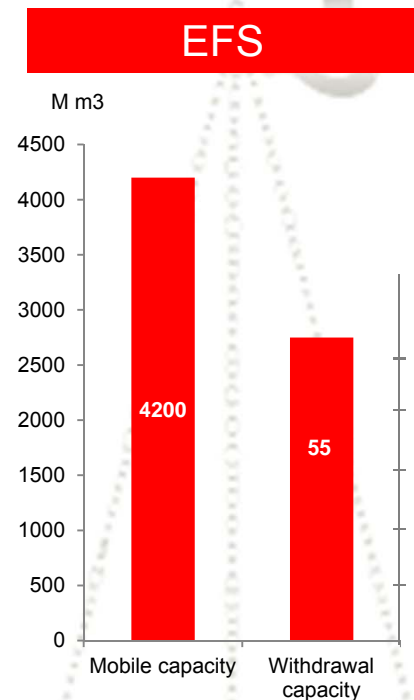
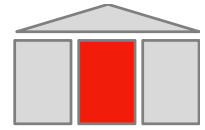


Increased gas storage need



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In the future, a balanced competition is essential for a transparent new storage capacity access regime



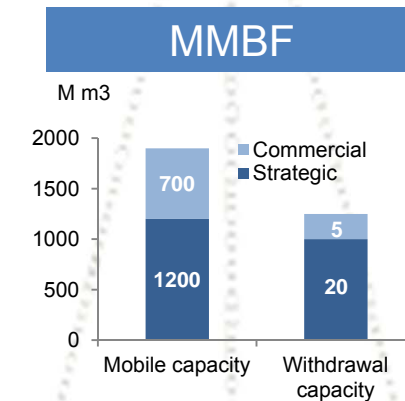
Equal storage capacity access method

Common primary & secondary booking rules

Transparent capacity price mechanism

Clear USP – non USP regulation

Clear separation of strategic and commercial capacity usage



Hungary has potential to become regional HUB



		<u>Storage tariff</u>	<u>Transmission tariff</u>
1	A	1,63 €/GJ/day/year	108 €/GJ/day/year
2	A + SK	1,69 €/GJ/day/year	131 €/GJ/day/year
3	HU	1,26 €/GJ/day/year	244 €/GJ/day/year

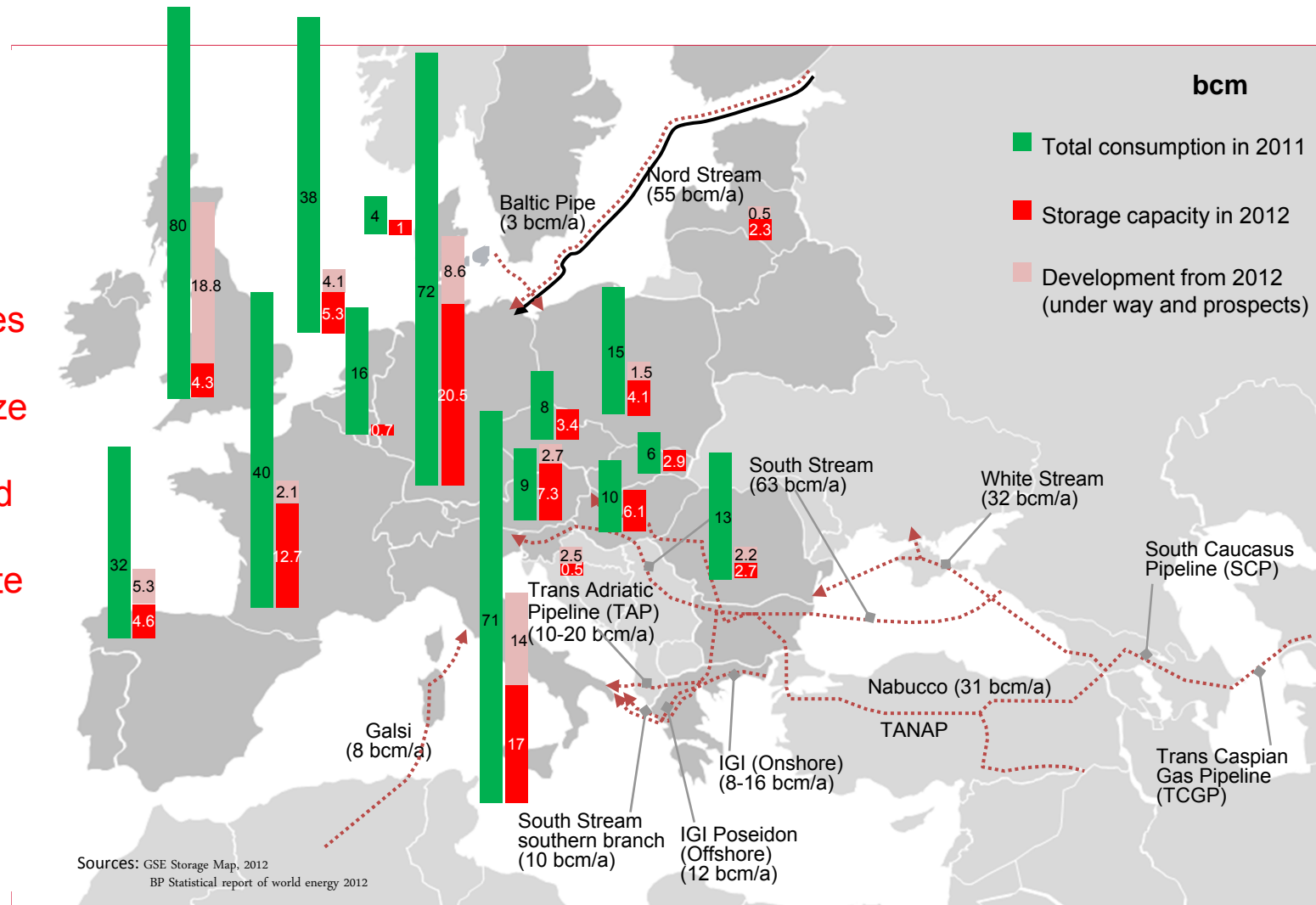


Market education & competitive system usage tariff will facilitate to become regional HUB.

Compared to Europe, the ratio of total storage capacity and consumption in Hungary is relatively high



New pipelines in the region should vitalize the storage business and increase the utilization rate in Hungary.





Thank you for your attention!

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