

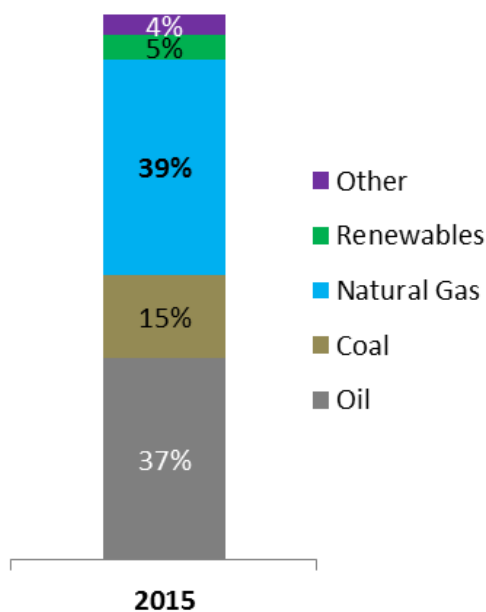
Natural gas in the Netherlands

Gertjan Lankhorst, CEO
19 October 2016

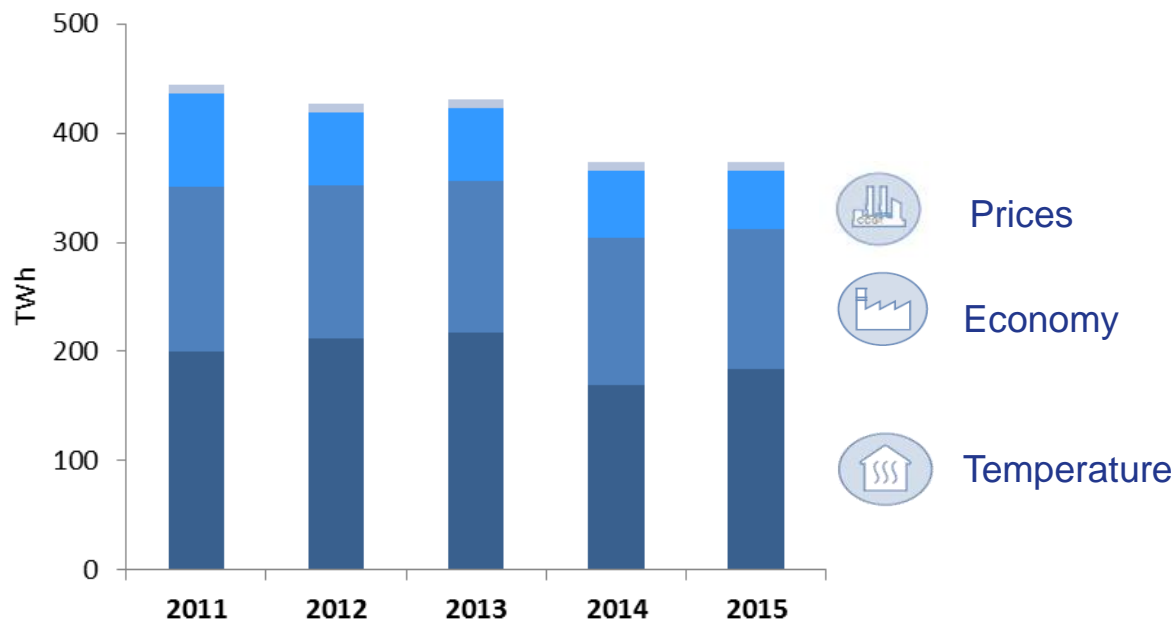


Strong but challenged role for gas

Primary Energy Consumption



Natural gas demand per sector



The intersection for supplies to Europe

- Domestic production and ample storage facilities providing supply flexibility
- Multiple pipeline import sourcing routes, with Norway, UK, Germany (from Russia) and Belgium
- Gate LNG terminal in Rotterdam provides access to global markets
- At this intersection, trade is flourishing



TTF - the price marker for gas in Northwest-Europe, and beyond

Broad liquidity

Sizeable forward markets which contribute to supply hedging

Price reference for other EU hubs and for long-term contracts indexation



- TTF is the only mature gashub in Continental Europe
- Wide variety of traded products with high liquidity
- TTF acts as a price driver for other European gashubs
- TTF is the price benchmark in long term contracts
- Euro denomination eliminates currency risk

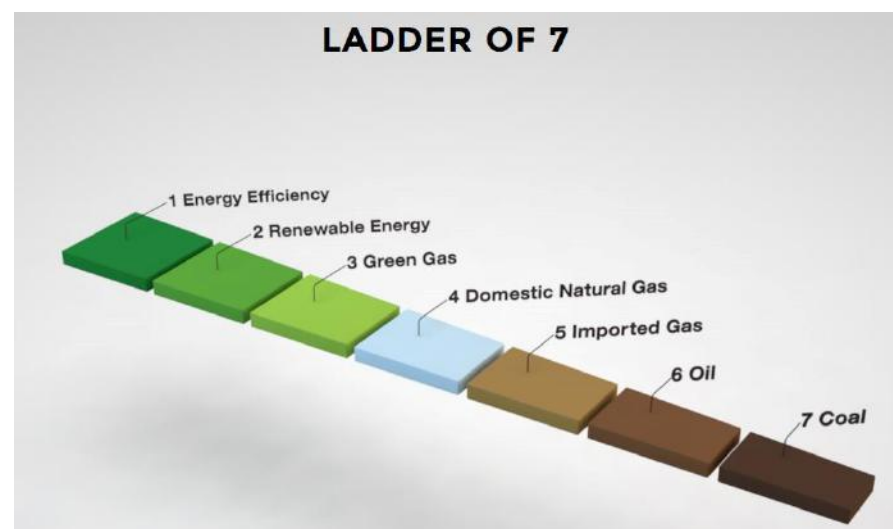
The new role: gas by design

Gas by design

Gas to only play a role where more sustainable sources are not yet available, and delivers largest contribution to society

- **Natural gas**
key for industry, and remains backbone for heating in a slowly changing housing stock
- **Green gas**
an increasing potential by power-to-gas with wind power on the North Sea, and biogas from our dairy farming

Our own guideline



The future of gas driven by innovation

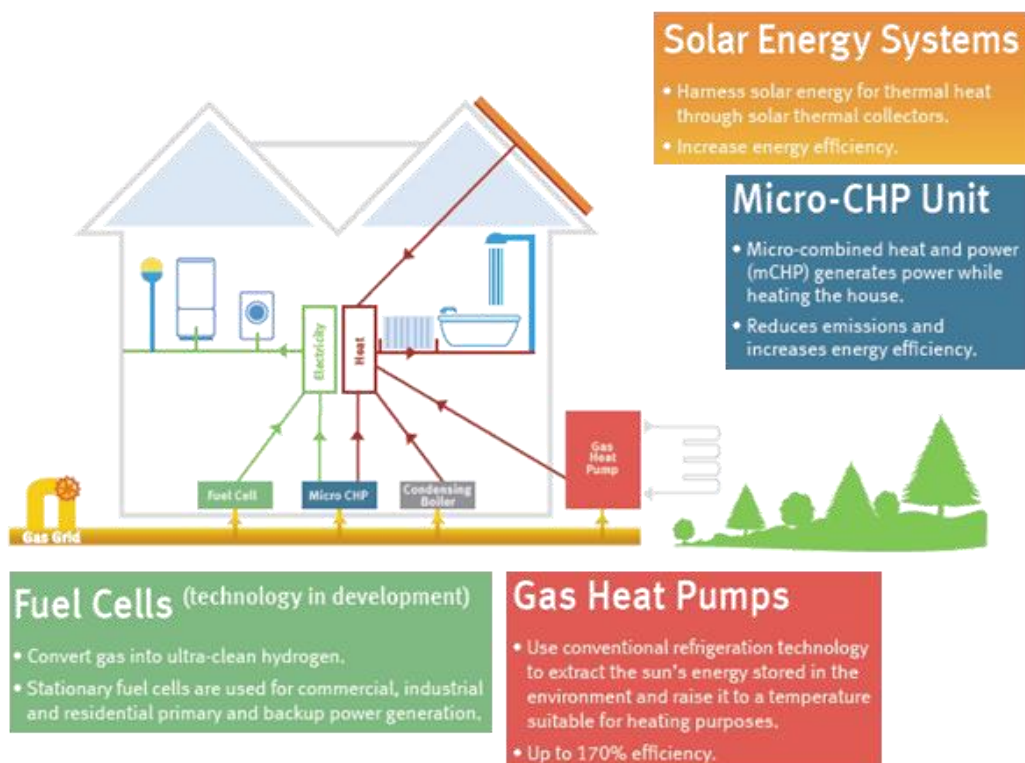
Ameland: a hotspot for sustainable energy – with gas



- | | |
|--|---|
|  Cogeneration |  H2 Hydrogen injection |
|  Solar park |  Heat pumps on green gas |
|  Green lights |  School vision |
|  Fuel cells |  Natural gas filling station |

- Exploring a full scale integrated energy system of the future
- Ameland is 20-years ahead of time in technological development
- Entrance research centre in Groningen providing fundamental R&D support

Systems integration with gas at a decentral level





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