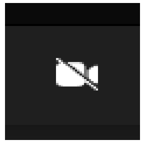
Market Operator User Group

10th September 2026

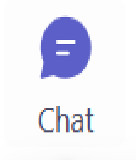
Housekeeping Rules

- Please keep your video switched off



- Raise your hand if you have a question

- Chat option will be available



Thank you for your cooperation.

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Welcome

Claire Kane

Agenda Items	Presenters
Welcome/MOUG Survey Feedback	Claire Kane
Release Program	Vikas Gupta
SEMO Trading	Michael Rainey
Settlements	John Tracey
System Operations IE	Robert Koch
Market Interface	Mark Cullen

MOUG Survey Feedback

Publish meeting presentation two days in advance of MOUG

Presenters available to answer questions during meeting

Offer Slido to submit questions during meeting

In person sessions becoming regular occurrence

Refresher training sessions on the market

Interconnection updates when available

Cover incoming market changes

Release Program

Vikas Gupta

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Releases

Release O/P

Release O and P will be delivered together. Go-live is scheduled for 07/09/2026.

Scope:

CR-350: SDP 03/05 (Fast Frequency Response (FFR)/Reserve services scheduling and dispatch)

CR-351: SDP 06 (Synchronous condenser scheduling and dispatch)

CR-332: Registration and Configuration of Celtic Interconnector within Central Market Systems (CMS)

CR-329: Physical notification feasibility monitoring

CR-302: Warning messages for IC scheduling optimisation

CR-311: Interconnector MMS correction

CR-317: Enhance DSI capability to use default values for ICRP

CR-338: Scheduling of interconnectors based upon net position forecast

CR-330: Adoption of multi NEMO arrangements

Releases

Release Q

FAT is complete. EirGrid testing preparation is underway.

Release Q go-live is currently expected in Q2 2027; dates remain subject to confirmation.

Scope:

CR-344: Upgrade MPI to support native Microsoft Edge

CR-341: ISEM market archive (MMS and CSB) and data retention reduction

CR-309: Disable Interruptible Load Feed from MMS to EMS

CR-305: System Action Repricing (Mod 17_22)

CR-295: Unit test under approval

CR-292: Group constraints editor

CR-263b: Retain Resource ID while changing ownership to a different participant

CR-214: ISEM CSB usable QA/QC screen

CR-353: Amend report_052

CR-345: Transfer of QFPN data from MMS to FASS

CR-356: Transfer of dispatch quantity from MMS to FASS

CR-343: SDP 03/05 Reserves V2

In addition, defect fixes listed on the next slide are included in this release.

Releases

Release Q - Defects (continued)

Defect fixes planned for delivery as part of Release Q

Salesforce #	ATS#	Title / Summary
20220505-6031814	263650	MMS EWIC Market Registration Data defect #6026
20230713-6179118	320583	QBOA for Wind Units. A change in the Instruction Profile was not captured in the ordering profile. A change availability was not picked up mid-way through an Imbalance Settlement Period. As this was not captured correctly, it resulted in incorrect QBOA value.
20241014-6355119	374599	Incorrect calculation of Net Imbalance Volume
20241112-6367202	378460	Error in Slope messages for units during billing week 21/07/2024 - 27/07/2024. BOAs were in the Indicative Settlement Run but were not produced following Initial and M+4, affecting settlement.
20250305-6415557	392183	Audit query - QABCURL differences on 25/01/2024 for NI Wind units. NI wind units received CURL and LOCL instructions between 04:16 and 05:15, then a new CURL effective 05:24.
20250318-6422094	393577	Audit query - BOA calculations for DSU_402090 on 24/10/2024. The DSU was dispatched below its FPN/AA and BOA should have been calculated; CSB did not calculate BOAs during this period.
20250327-6427159	395088	Audit query - DQ and QAA are zero until 21:15. Until this point, QBOA should be 0. For 10:30, 11:00, 17:30 and 18:00 ISPs, there is an associated QAO and QAB calculated by SEMO.
20260119-6564030	441879	Nomination file size adjustment

SEMO Trading

Michael Rainey

Imbalance Pricing and Publications

Upcoming Imbalance Price Outages:

Date	Outage	Time (DST)
16 September 2026	Imbalance Pricing Outage	13:30 – 15:30
22 September 2026	Imbalance Pricing Outage	10:00 – 13:00
29 September 2026	Balancing Market Outage ○ MPI and Imbalance Pricing	14:30 – 16:00

SEMO Website:

Date	Outage	Time (DST)
22 September 2026	SEMO Website Reports Unavailable	14:30 – 16:00

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Repricing Status

Repricing Status

- Repricing completed for **17 June 2025** and **3 July 2025**. The revised prices were republished on **27 August 2026**. See relevant Market Message for further information.
- A manifest error was declared for 2 September 2026 and has been added to the Balancing Market Repricing Calendar.
- Materiality assessments will resume after deployment of Release O/P and an updated schedule of repricing will be communicated to Market Participants.

Repricing Calendar

Calendar Day	Imbalance Settlement Period(s)	Billing Period End Date	Manifest Error ID	Materiality Assessment	Reprice Publication Date[1]
10/09/2024	02:30 to 11:30	14/09/2024 (Week37)	RPC4	06/02/2025	13/02/2025
30/09/2024	18:00 to 00:00	05/10/2024 (Week40)	RPC10	13/02/2025	20/02/2025
01/10/2024	00:00 to 00:30	05/10/2024 (Week40)	RPC10	Price Threshold Not Met	Not Required
13/12/2024	23:30 to 00:00	14/12/2024 (Week50)	RPC4	Price Threshold Not Met	Not Required
14/12/2024	00:00 to 08:30	14/12/2024 (Week50)	RPC4	26/03/2025	03/04/2025
17/12/2024	15:00 to 15:30	21/12/2024 (Week51)	RPC11	Date to be confirmed	Date to be confirmed
30/04/2025	10:30 to 17:00	03/05/2025 (Week18)	RPC4	12/03/2026	19/03/2026
09/05/2025	08:30 to 00:00	10/05/2025 (Week 19)	RPC4	12/03/2026	19/03/2026
10/05/2025	00:00 to 00:00	10/05/2025 (Week 19)	RPC4	19/03/2026	31/03/2026
11/05/2025	00:00 to 00:00	17/05/2025 (Week 20)	RPC4	Price Threshold Not Met	Not Required
12/05/2025	00:00 to 00:00	17/05/2025 (Week 20)	RPC4	02/04/2026	09/04/2026
13/05/2025	00:00 to 00:00	17/05/2025 (Week 20)	RPC4	Date to be confirmed	Date to be confirmed
14/05/2025	00:00 to 00:00	17/05/2025 (Week 20)	RPC4	09/04/2026	16/04/2026
15/05/2025	00:00 to 01:00	17/05/2025 (Week 20)	RPC4	Price Threshold Not Met	Not Required
17/06/2025	09:00 to 13:00	21/06/2025 (Week 25)	RPC4	20/08/2026	27/08/2026
03/07/2025	12:00 to 14:30	05/07/2025 (Week 27)	RPC4	20/08/2026	27/08/2026
27/11/2025	11:30 to 12:30 14:30 to 21:00	29/11/2025 (Week 48)	RPC12	Date to be confirmed	Date to be confirmed
31/12/2025	00:00 to 00:00	03/01/2026 (Week 1)	RPC4	Date to be confirmed	Date to be confirmed
01/01/2026	00:00 to 08:30	03/01/2026 (Week 1)	RPC4	Date to be confirmed	Date to be confirmed

Calendar Day	Imbalance Settlement Period(s)	Billing Period End Date	Manifest Error ID	Materiality Assessment	Reprice Publication Date[1]
12/05/2026	17:00 to 00:00	16/05/2026 (Week 20)	RPC12	Date to be confirmed	Date to be confirmed
13/05/2026	00:00 to 12:30	16/05/2026 (Week 20)	RPC12	Date to be confirmed	Date to be confirmed
10/06/2026	10:30 to 16:00	13/06/2026 (Week 24)	RPC4	Date to be confirmed	Date to be confirmed
02/07/2026	01:30 to 05:30	04/07/2026 (Week 27)	RPC10	Date to be confirmed	Date to be confirmed
05/08/2026	11:30 to 12:00	08/08/2026 (Week 32)	RPC11	Date to be confirmed	Date to be confirmed
02/09/2026	14:00 to 14:30	05/09/2026 (Week 36)	RPC11	Date to be confirmed	Date to be confirmed

Application of Default Commercial Offer Data (COD)

Market Issue

- SEMO recently issued a Market Message advising of an issue with the application of Default Commercial Offer Data (COD) within market systems.
- Further details are available in the Market Message here.

Mitigation Measures

- Participants required under the Trading and Settlement Code (TSC) to submit Default Data should submit Trading Day specific Complex COD in advance of Gate Closure 1 (GC1) each day.
- Until the issue is resolved, SEMO will perform a daily check to confirm that Complex COD has been submitted before GC1.
- Where any Market Participant is impacted by this issue, specifically where no Trading Day specific Complex COD has been submitted and Default Data has not been converted in market systems, SEMO will issue a reminder email to the relevant Market Participant.

Market Participant Actions

- Ensure Balancing Market registration contact information is current and accurate.
- SEMO will use the registered contact details when issuing reminders.
- If you wish to update your contact information, or specify preferred contact details, please contact info@sem-o.com.

Limited Communications Failure (LCF) - Clock Change

The transition to Winter-Time (GMT) will occur on **25 October 2026**.

Participant Guides

The Long Day Guide is included in Appendix B of the Offer Data Limited Communication Failure – Participant Guide v 1.5.

LCF Long Day Tool

- A Market Message will be published in advance of the clock change.
- The message will include links to the Long Day LCF Tool and LCF Participant Guide.

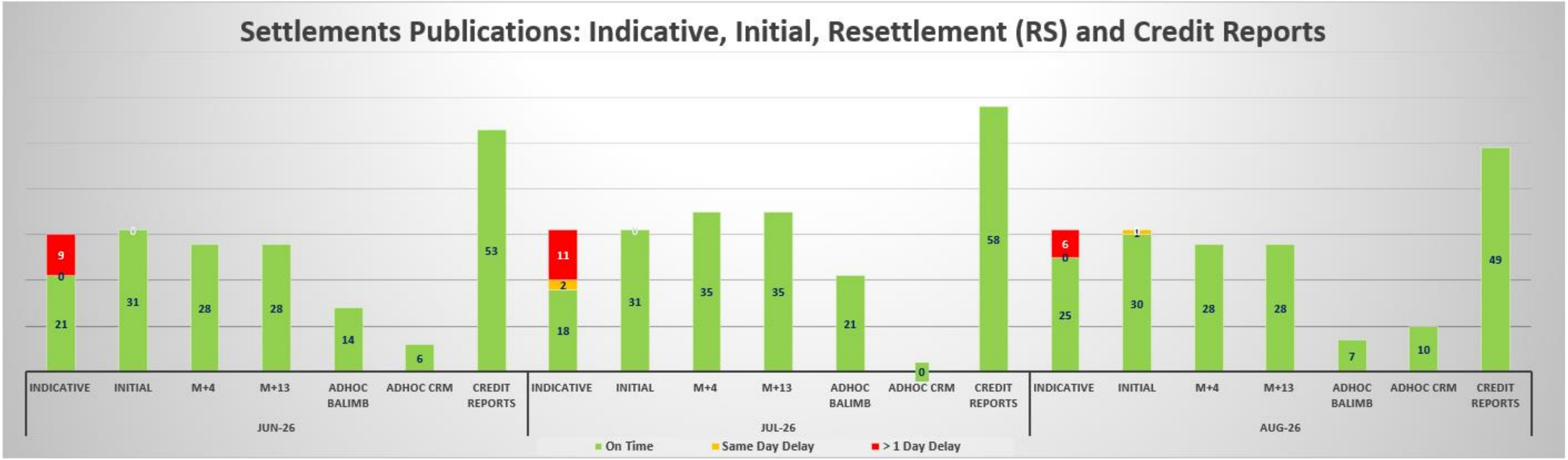
Registration and Authorised User Information

- Participants should ensure that registration and authorised user information is up to date.
- This information can be updated in the Market Participant Interface (MPI) by Party Authorised Users (PAU).
- If you have any queries on updating registration or authorised user information, please contact info@sem-o.com.

Settlements

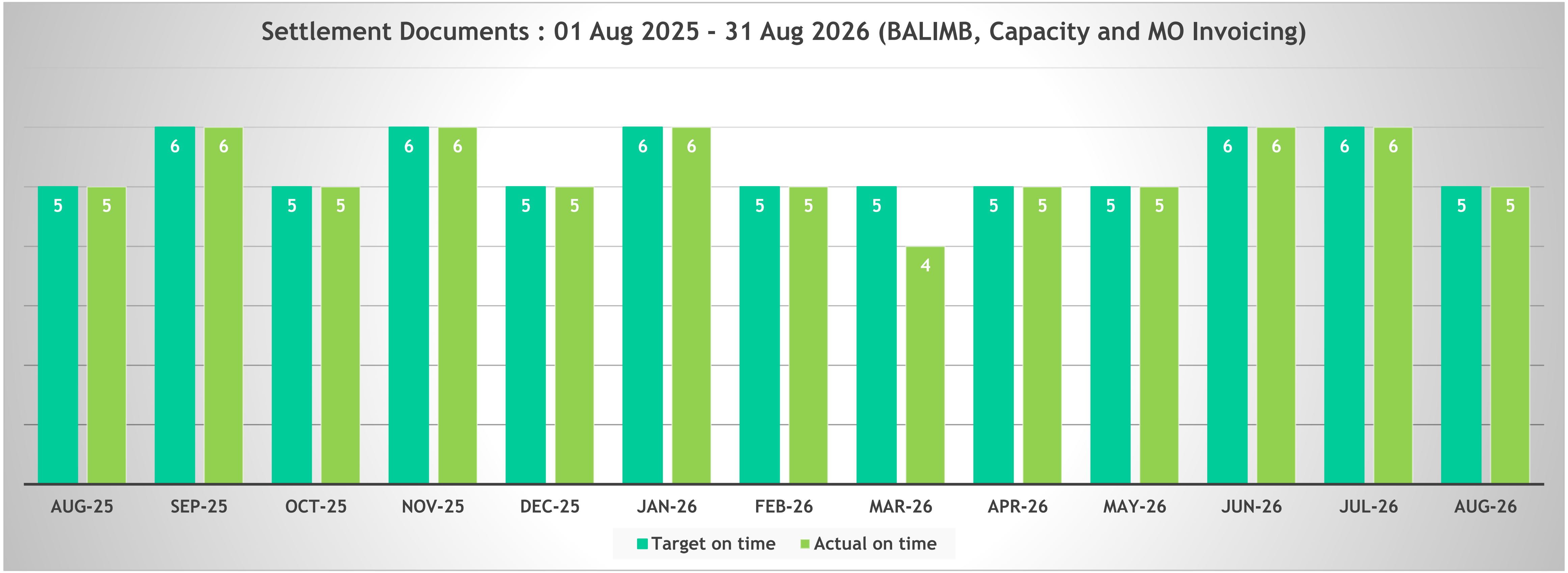
John Tracey

Settlement Publications & Timelines: 1st June 2026 - 31st August 2026



June 2026	July 2026	August 2026
▪ **181** settlement publications on time ▪ Indicative - 1 delay due to slower than usual processing times, 8 delayed due to late receipt of data ▪ No delays for Initial publications ▪ No delays for Credit Report publications ▪ 6 Capacity months published for Ad-Hoc	▪ **198** settlement publications on time ▪ Indicative - 8 delays due to slower than usual processing times, 5 delayed due to late receipt of data ▪ No delays for Initial publications ▪ No delays for Credit Report publications	▪ **177** settlement publications on time ▪ Indicative - 4 delays due to slower than usual processing times, 1 delayed due to late receipt of data and 1 delay due to internal processing issues ▪ 1 delayed Initial due to internal processing issues ▪ No delays for Credit Report publications ▪ 10 Capacity months published for Ad-Hoc

Settlement Documents Publications



Settlement Document updates:

- 70 Settlement Documents (SDs) published on time between 1st August 2025 and 31st August 2026 (includes BALIMB, Capacity and MO Invoices). One delayed Settlement Document on 13th March 2026 due to MDP Data Issue.

Net Settlement Document & Clean Energy Package

The summation or net of all published Settlement Documents (SD) plus the cost of the Clean Energy Package (CEP) from start of October 2024 to date is ~€21M:

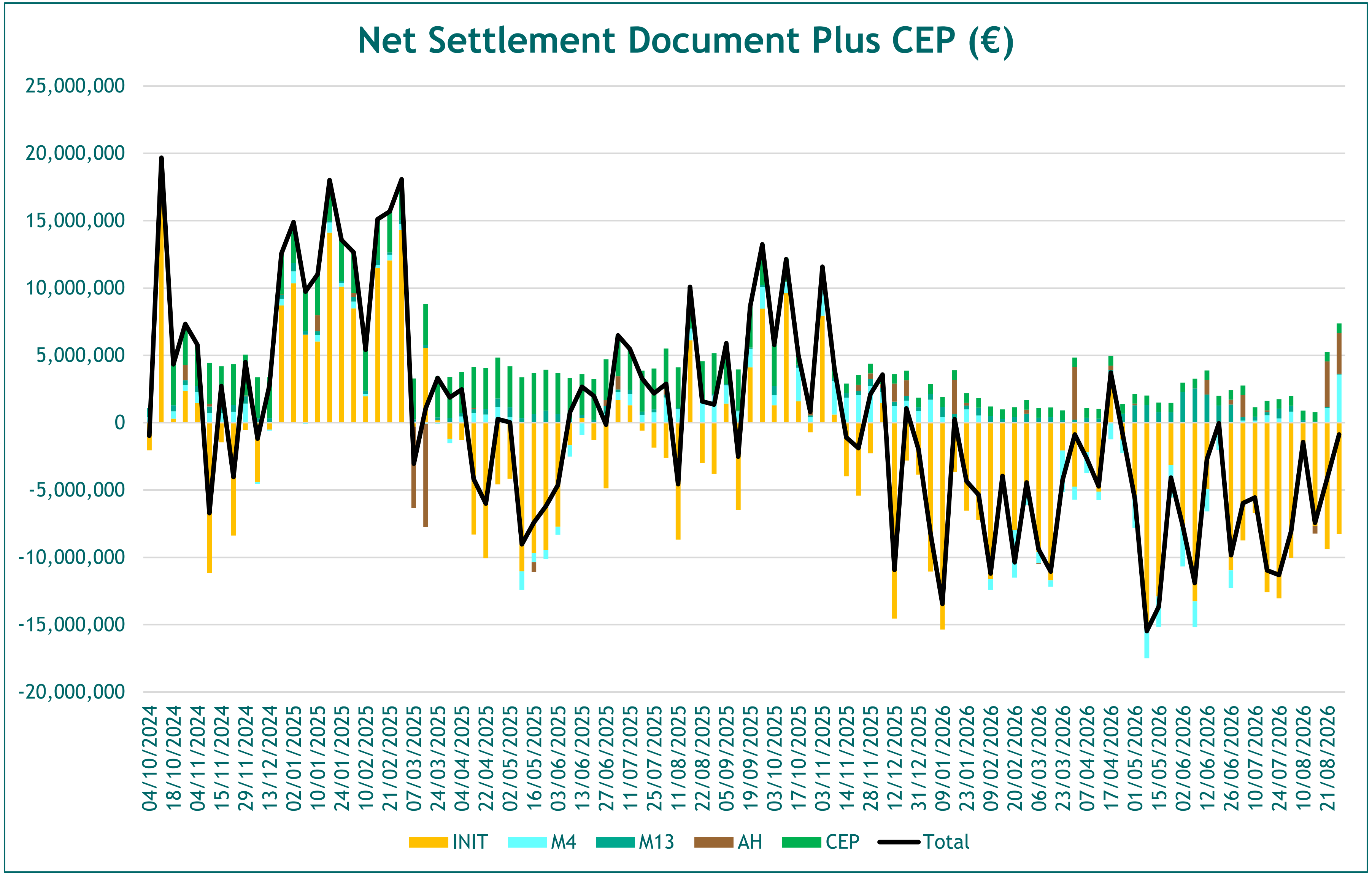
➢ -€170.5M from SD's

➢ €191.5M from CEP

Largest swings in Prices from 24/25 to 25/26 (€ per MWh)

- PIMP: Imperfections Price increase by 36.3% (€14.62 to €19.93)
- PCCSUP: Supplier Capacity Charge Price decreased by 14.9% (€21.23 to €18.07)
- PREV: Residual Error Volume Price changed from a payment to a charge (€0.46 to -€1.83)

CEP has also reduced in 25/26 compared to 24/25 (~€3M p w to ~€0.7M pw)



Positive values = Payments out by SEMO
Negative value = Payments due to SEMO

Strike Price (PSTRw) Movements 2026

The weekly Strike Price, PSTRw was above €500 for the following weeks:

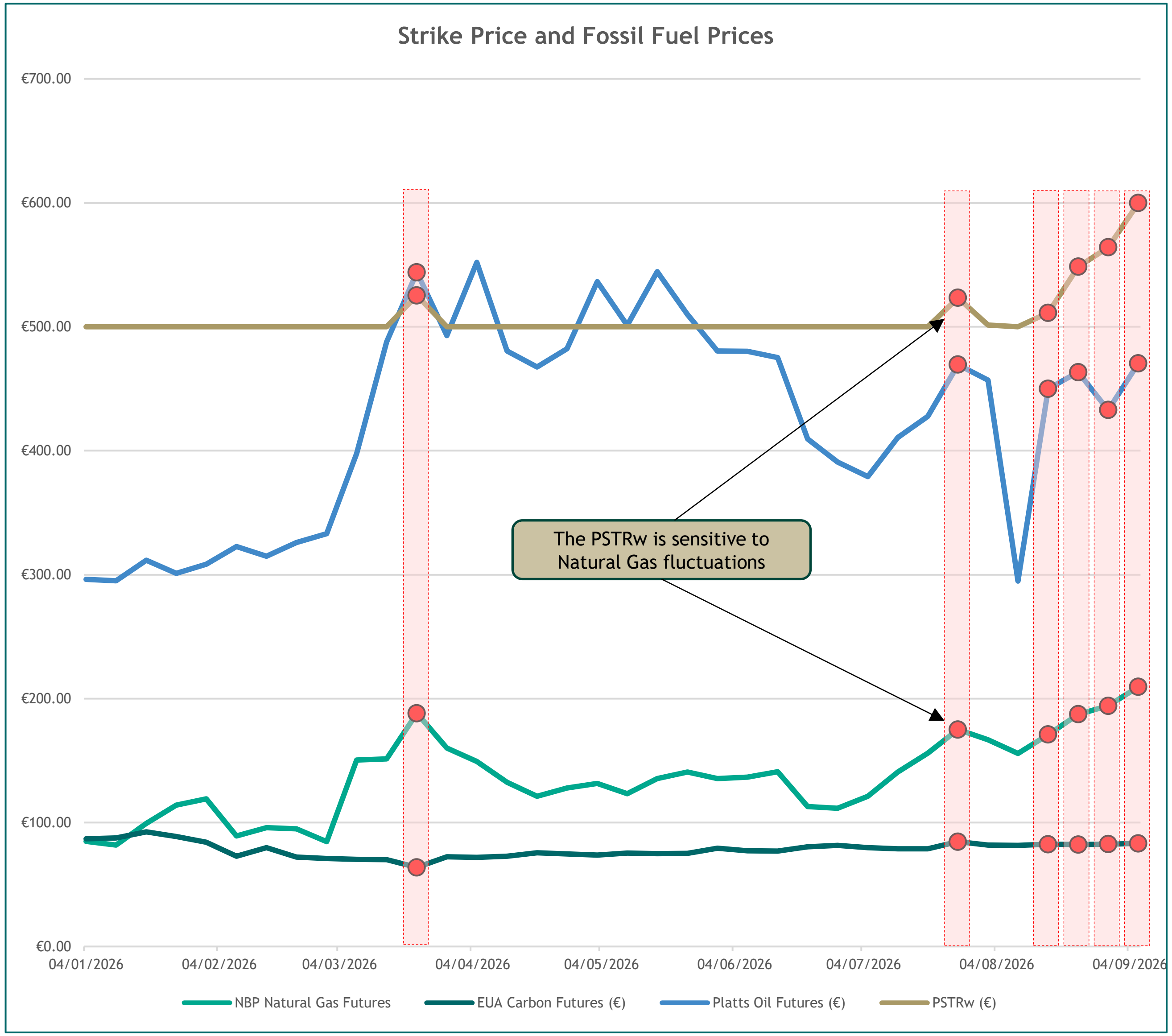
- €525.22 for billing week 22/03/2026 - 28/03/2026
- €523.21 for billing week 26/07/2026 - 01/08/2026
- €501.28 for billing week 02/08/2026 - 08/08/2026
- €511.19 for billing week 16/08/2026 - 22/08/2026
- €548.40 for billing week 23/08/2026 - 29/08/2026
- €564.04 for billing week 30/08/2026 - 05/09/2026
- €599.71 for billing week 06/09/2026 - 12/09/2026

The primary driver for these increases are higher **natural gas futures prices**, as highlighted in the graph.

Natural Gas Futures currently avg. €179.91 p/therm in last 7 weeks compared to €125.21 p/therm in the previous 29 Weeks dating back to 04/01/2026.

The three main parameters for the Strike Price are all reported in € and FX-rates applied where applicable:

- PCARBONm - Carbon Price (Monthly Futures)
- PFUELNGdm - Natural Gas Fuel Price (Year End Futures)
- PFUELOm - Oil Fuel Price (Current)



Natural Gas Fuel Price and Oil Fuel Price to € using daily FX rate.

Settlement Documents to issue Friday 11th September 2026

[Settlement Calendar (sem-o.com)]

Settlement Document for Friday 11th September
Initial BALIMB - (30/08/2026 - 05/09/2026) - Week 36 2026
M+4 BALIMB - (10/05/2026 - 16/05/2026) - Week 20 2026
M+13 BALIMB - (10/08/2025 - 16/08/2025) - Week 33 2025
Adhoc BALIMB - (31/05/2026 - 06/06/2026) - Week 23 2026
Initial CRM - Aug 2026

System Operations IE

Robert Koch

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Security of Supply

System status over summer:

- New solar record set: 1319.23 MW on 24/08/2026 at 11:43

Margins have been tight due to:

- Generator availability/outages
- Reliance on imports on days with low RES
- Tight margins at times in Great Britain

Non-market generation:

- **Margin Warnings:** **9** issued over summer
- **TEG Dispatch:** **2** (24/6 & 12/8):
- **Margin Shortfall Risk and REU Initiated:** **1** (issued on Sat 29/8 for Tuesday 1/09).

	Site	MW	Fuel
TEG 1	North Wall	193	Gas
	Huntstown	50	Gas
TEG 2	Shannonbridge	262	Distillate
	Tarbert	150	Distillate
REU	Moneypoint (MP1, MP2, MP3)	750	HFO

Quarter (Calendar)	Margins & Alerts	Start	End	Unit Dispatched
2026 Q2	Margin Warning	23/06/2026 18:00	24/06/2026 00:30	-
2026 Q2	Margin Warning	24/06/2026 08:00	24/06/2026 11:30	-
2026 Q2	Margin Warning	24/06/2026 18:00	25/06/2026 00:30	-
2026 Q2	TEG Dispatch	24/06/2026 18:21	24/06/2026 22:51	NW8
2026 Q2	Margin Warning	25/06/2026 18:18	26/06/2026 00:00	-
2026 Q3	Margin Warning	07/07/2026 20:00	08/07/2026 01:10	-
2026 Q3	Margin Warning	09/07/2026 18:30	10/07/2026 01:05	-
2026 Q3	Margin Warning	12/08/2026 18:00	12/08/2026 21:30	-
2026 Q3	TEG Dispatch	12/08/2026 18:53	12/08/2026 20:14	TB5
2026 Q3	Margin Warning	13/08/2026 07:00	13/08/2026 10:00	-
2026 Q3	Margin Warning	27/08/2026 21:07	27/08/2026 23:27	-
2026 Q3	Margin Shortfall Risk	29/08/2026 19:47	31/08/2026 19:30	-

Principles

- TEG units are prioritised over MP units
- REU units will be prioritised when:
  1. Available TEG capacity (MW) is anticipated to be inadequate
  2. TEG annual run-hours are a concern
  3. Scenarios that give rise to heightened risk (next slide)

Details on treatment of non-market generation were outlined on page 40 of the Sept 2025 MOUG slides
Quarterly reports on Margin Warnings and System Alerts are also published on the EirGrid Website

TEG Dispatch: 12th August 2026

150 MW of TEG at Tarbert was dispatched on 12th August 2026 during the Solar Eclipse:

- Plans were put in place to manage the impact with ENTSO-E's Operational Group to coordinate pan-European readiness ahead of the eclipse.
- **Generation:** Three large generators in Ireland were on outage – DB1/HN2/TYC. There were significant constraints on other generators due to system outages. Limited little hydro generation was available and IC import schedules were low due to GB low margins. Wind generation was low.
- **Solar generation** decreased from 541 MW at 18:00 to 8 MW at 19:15 (98.5% decrease). This compares to a decrease on Tuesday of 607 MW to 244 MW over the same period (a 60% decrease). Solar generation in Ireland picked up again to 83 MW at 19:45 as the eclipse was passing.
- **System demand** was also higher on the day due to the high temperatures.
- **System Margin Warning:** Issued for 18:00. All available unconstrained market generation was dispatched, together with DSUs. Flexible Demand was called.
- **TEG Dispatch:** Following the rapid decrease in solar generation during the eclipse and given some challenging contingencies limiting market generation, it was necessary to dispatch 150 MW of TEG at Tarbert – as this was deemed the best location to manage both. TEG was dispatched at 18:55 until 20:21.
- **Market transparency:** In line with the requirements of the RPP, Market Messages were issued for the Margin Warning and TEG dispatch.
- **The system remained secure** and did not enter Alert State.

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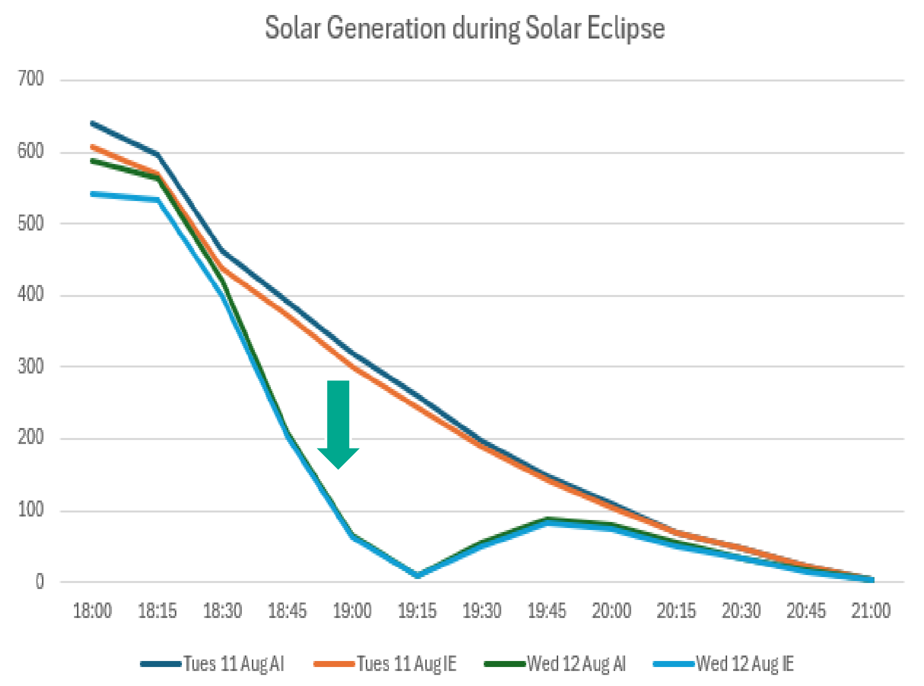
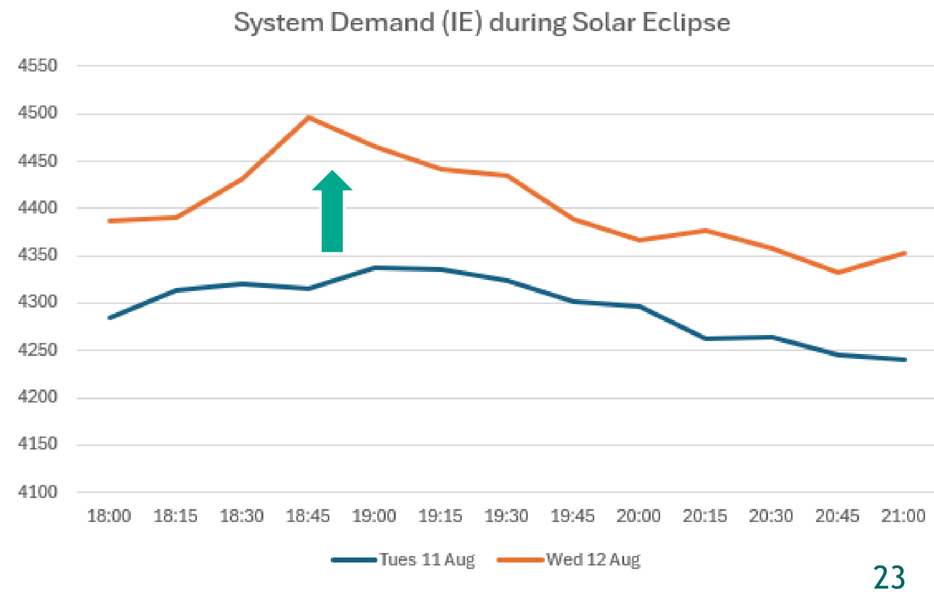




Margin Shortfall Risk: 29th August to 1st September 2026

2025 Q4	**Margin Shortfall Risk**	22/11/2025 23:06	25/11/2025 14:30
2026 Q3	**Margin Shortfall Risk**	29/08/2026 19:47	31/08/2026 19:30

Margin Shortfall Risk issued:

19:47 Saturday 29th August for evening peak period on Tuesday 1st September.

Synchronisation instruction:

Issued to unit MP1 for 09:00 Tuesday at 21:58 Saturday August 29th, anticipating 56-hour notification period and time required to reach maximum MW output.

The decision was driven by:

- Planned or forced unavailability of significant amount of dispatchable generation - notable outages: DB1 [415 MW], ED1 [118 MW], TYC [404 MW], WG1 [444 MW], PB16 [168 MW]
- Significant transmission constraints on generation due to planned and forced transmission outages
- Low RES forecasts
- Higher anticipated demand.

Margin Shortfall Risk lifted:

- 19:47 on Monday September 1st with sync instruction for unit MP1 cancelled @ 21:58.
- Decision taken in light of improving dispatchable generation adequacy situation, improved RES forecast, lower than anticipated demand and imports anticipated on all interconnectors.

This is the 2nd Margin Shortfall Risk issued since the MP units exited the market on 30th June 2025.

(Previously: 22nd to 25th Nov 2025)

In both cases the instruction to synchronise was cancelled due to improved system conditions closer to the time.

Details on treatment of non-market generation were outlined on page 40 of the Sept 2025 MOUG slides

Large Demand Facility Fault Ride Through Risk

System Status:

- Over the summer period we have had to manage the risk related to non-FRT capable demand associated with higher temperatures. *(See MOUG presentation May 2026)*
- This was managed through the dispatch of Demand Side Units (DSUs) associated with Data Centres using on-site generation to keep non-FRT capable demand below the 900 MW Load Rejection Limit.

Grid Code Modification & Demand Utilisation Threshold:

- CRU invited further representations on the EirGrid Grid Code Modification and associated Compliance and Derogation proposals during July 2026.
- A CRU decision is awaited.

FRT Demand Curtailment Procedure:

- In addition to the existing operational measures, a procedure has been developed and communicated with large data centre demand customers to curtail non-FRT capable demand connected at 110kV and above.
- The procedure requires non-FRT capable facilities to curtail demand to an FRT MW Limit when security criteria are exceeded or anticipated to be exceeded (i.e. the 900 MW Load Rejection Limit).
- Facilities that do not reduce demand may be disconnected to secure the system.

FRT Measures currently in place

Risk mitigation measures are in place to ensure the stability of the All-Island power system in the event of mass-disconnection of data centre demand in response to fault on power system.

Studies indicate the total system ‘Load Rejection’ must not exceed 900 MW. This is currently respected by:

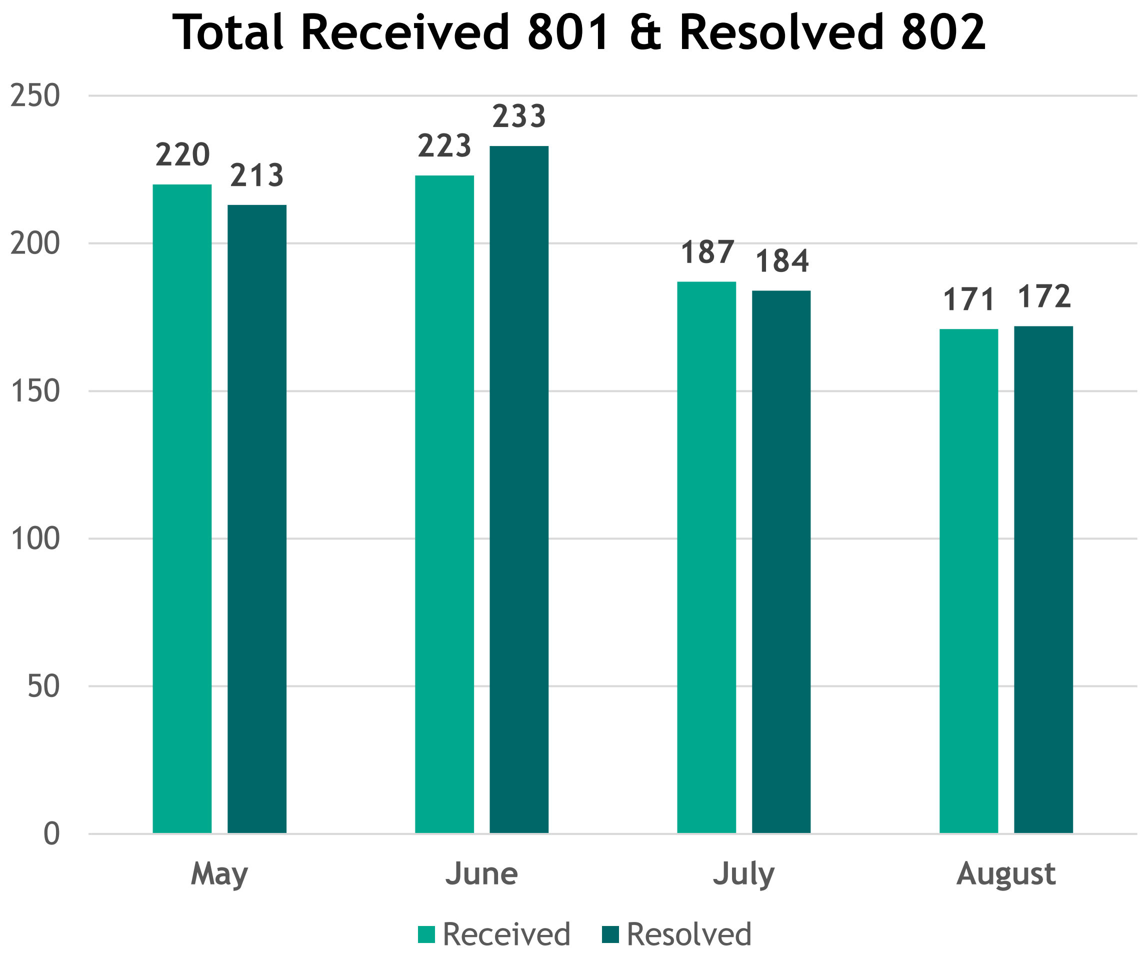
- Trade-back of relevant interconnector exports
- Battery constraints required to manage post-‘Load Rejection’ frequency zenith & to prevent Over-Frequency Generation Shedding (OFGS) *[SoC 85% / charging 200 MW]*
- Increased inertia floor required to ensure Rate-of-Change-of-Frequency (RoCoF) limits respected. *[28,000 MW.s]*

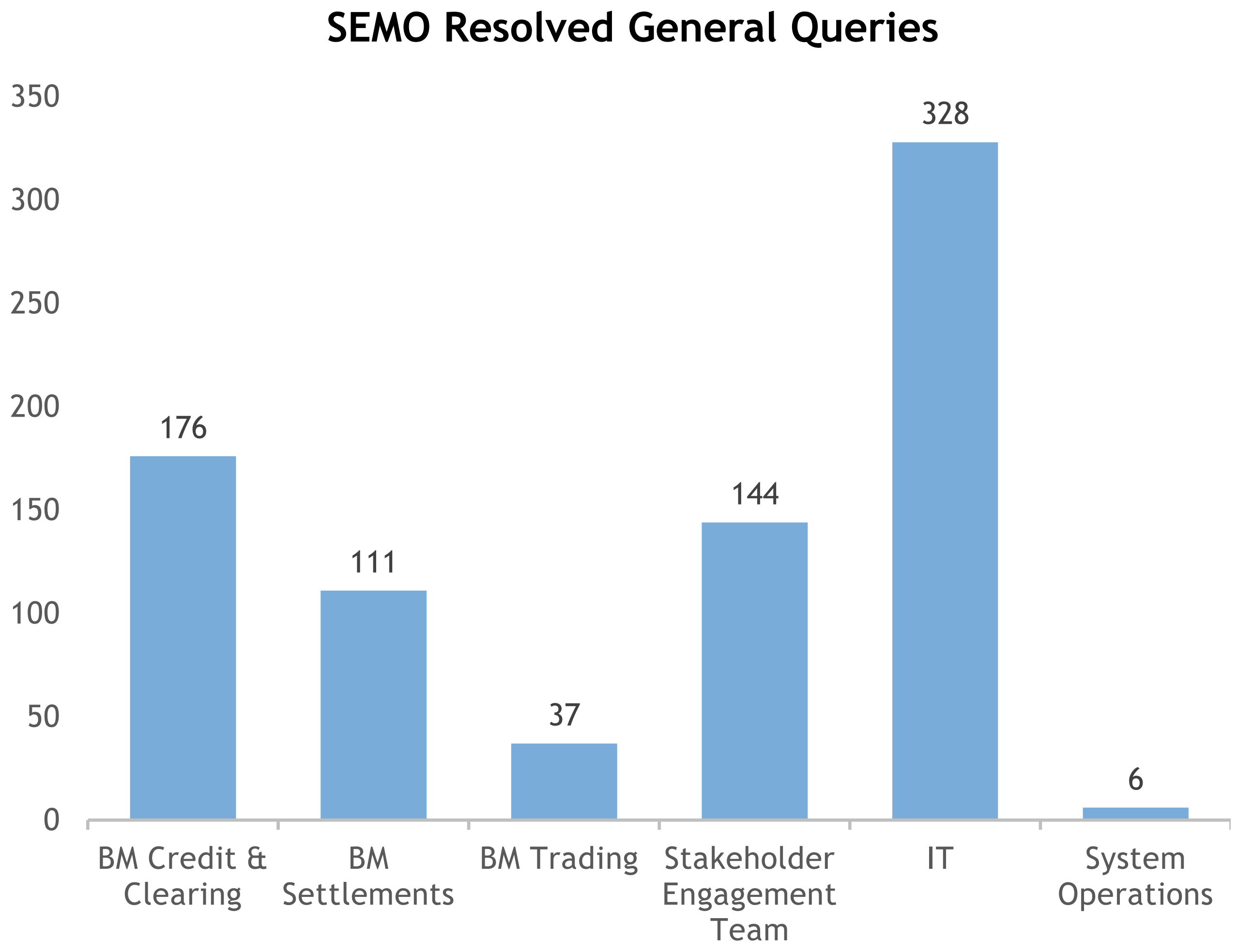
See slides 28 to 30 of MOUG Presentation 28th May 2026 on the SEMO Website
See Weekly Operational Constraints Update published on the SEMO Website

Market Interface

Mark Cullen

SEMO General Queries:
May - August





Disputes

- May – August 2026: No Disputes raised.

Formal Settlement Queries (28th of May 2026 – August 31st 2026)

- Received: 37
- Closed: 42
- Open: 5

Dates to Note

- The next Thursday Participant call @09.30am will take place on 17th of September 2026.

- The remaining Market Operator User Group (MOUG) meetings for 2026 are scheduled on the following dates:
    - 25th November – In-person
    - 10th December

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Thank you for your attendance

SEMO Website:

- http://www.sem-o.com/

SEMO Contacts:

- info@sem-o.com
- BalancingMarketRegistration@sem-o.com;

Capacity Market:

- CapacityMarket@sem-o.com

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