

GASMARKNADSRÅDET

Marknadsinformation Danmark

22 September
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AGENDA



- Baltic Pipe - REMIT
- Key assumption for gas
- Climate goals call for sector coupling

BALTIC PIPE TOPIC

CAPACITY LEVEL Q4 2022 – REMIT 9/9-2021

As previously announced, the revoke of the Environmental Impact Assessment for the Baltic Pipe Project will impact on the capacity level in Q4 2022.

The firm capacity level in the period 1 October 2022 – 31 December 2022 for IP Faxe towards Poland is calculated at 3,550 MWh/h.

The capacity will be recalculated on a short-term basis, in order to offer additional firm capacity and to maximize the interruptible capacity, during this period.

In accordance with the Capacity Allocation Mechanisms Network Code (NC CAM), 10 per cent of the firm capacity level must be saved for short-term contracts





Official
<< Publications >>

What is the difference?



ENERGINET

- Requested: by parliament act, gives a yearly status and projection on climate.
- Purpose: to ensure yearly follow up, if the climate initiatives is supporting the goals of reducing the Danish greenhouse gases by 70 pct. by 2030 (compared to 1990).
- An assessment of how greenhouse gas emissions as well as energy consumption and production will develop towards 2030 in a so-called "frozen policy" scenario.
- ["Frozen policy" means that the development is conditional on a "politically frozen" absence of new initiatives in the climate and energy field in addition to those decided by the Parliament before 1 January 2021, or as a result of binding agreements.]
- <https://ens.dk/service/fremskrivninger-analyser-modeller/klimastatus-og-fremskrivning>

Analyseforudsætninger til Energinet 2021

- Indicates a likely development for the Danish electricity and gas system to 2040.
- Purpose: for use in Energinet's task of planning the development of the transmission network and concentrating on the development in electricity and gas consumption [as well as in electricity and district heating production capacities.]
- The Analysis Assumptions are thus not based on a Frozen Policy scenario.
- <https://ens.dk/service/fremskrivninger-analyser-modeller/analyseforudsætninger-til-energinet>

GAS DEVELOPMENT

Analyseforudsætninger til Energinet

August 2021

- The Danish Energy Agency delivers the best bid for the future to Energinet
 - 19 pages
 - Background notes: 12 (one on gas)
 - Dataset
 - Public consultation (14 replies)



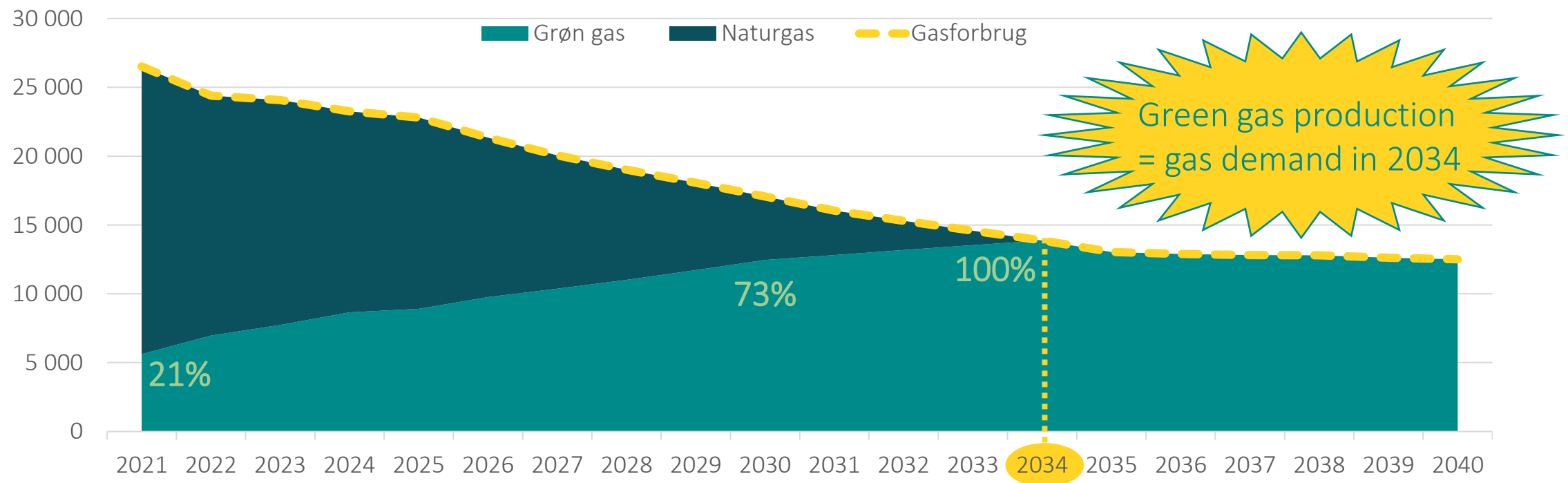
Remember to separate
between consumption,
production and transit

ENERGINET

DENMARK - KEY ASSUMPTION FOR GAS

Green gas production increase of 147% [from 5.618 GWh in 2021 to 13.874 GWh in 2034]

Gas consumption falls with 53% [from 26.512 GWh in 2021 to 12.503 GWh in 2040]



Gasforbrug

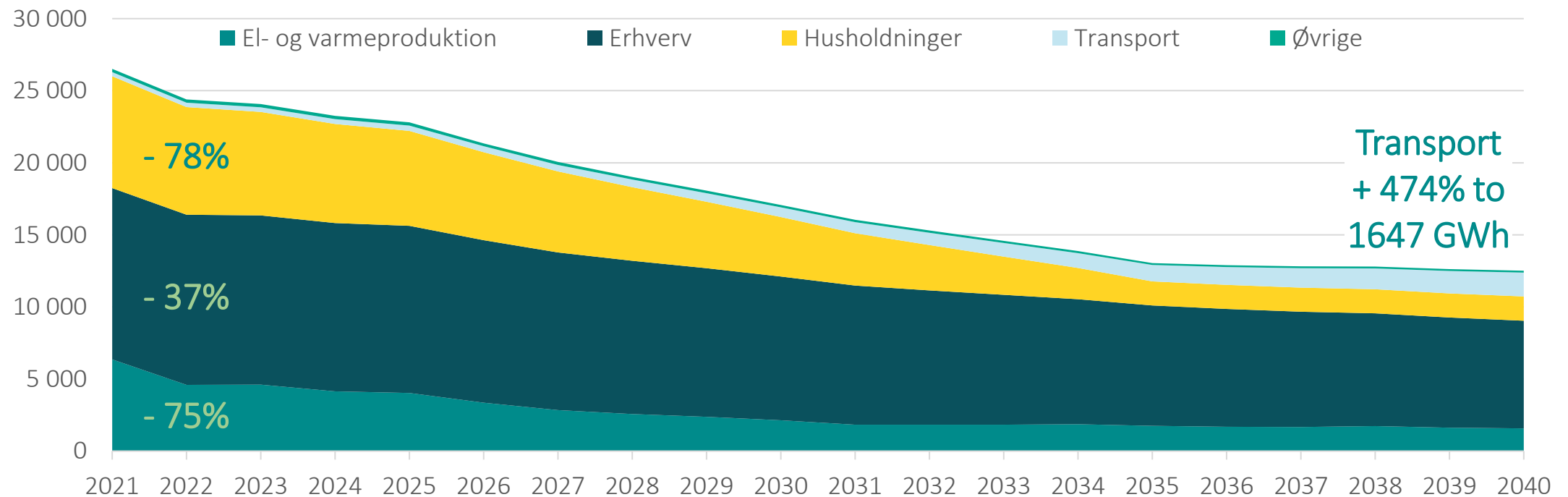
Figuren herunder viser udviklingen i forbruget af ledningsgas fordelt efter anvendelse. Reduktionen frem mod 2030 skyldes i stort omfang muliggørelsen af opfyldelse af målet om 70 pct. drivhusgasreduktion i 2030. Det betyder et faldende forbrug som følge af udfasning af naturgas i husholdninger og erhverv samt omstilling af fjernvarmeproduktionen væk fra brugen af fossile brændsler.

ENERGINET

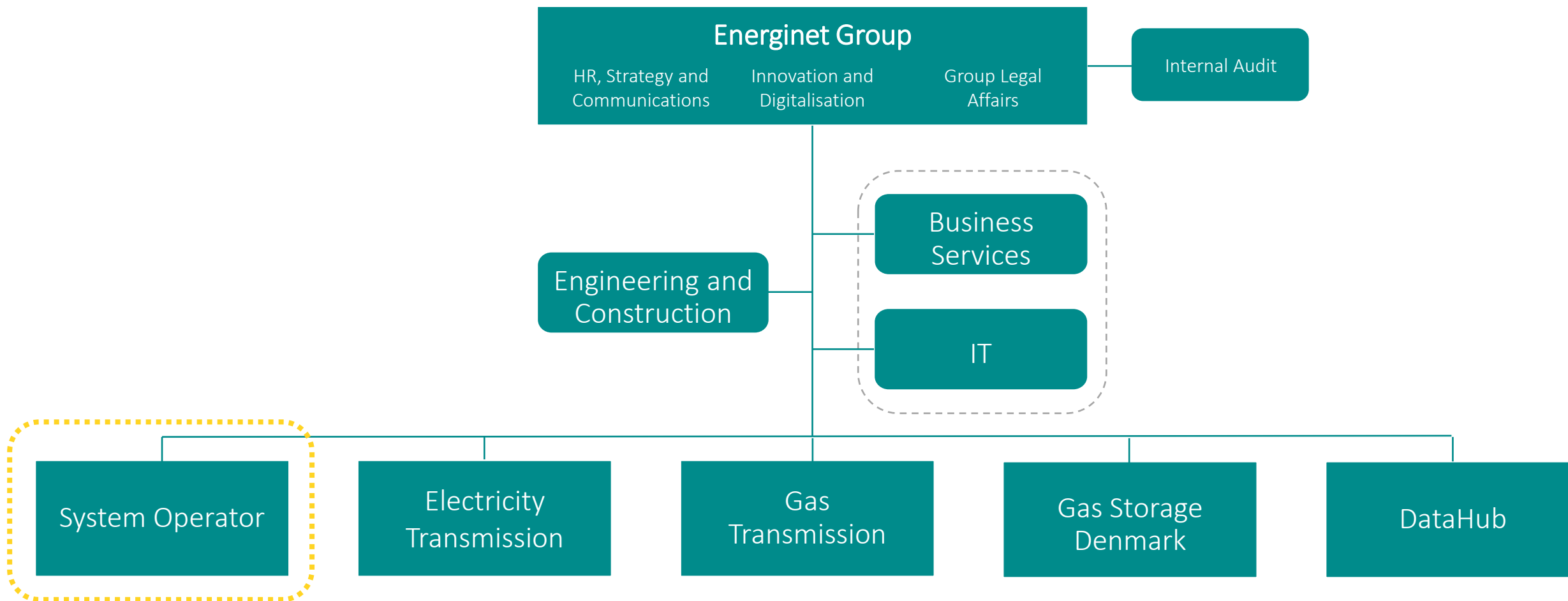
DEVELOPMENT IN DANISH - GAS CONSUMPTION

Significant fall in projected gas demand from now to 2040

Only project gas demand increase for transport



ENERGINET'S NEW ORGANIZATION



CLIMATE GOALS CALL FOR SECTOR COUPLING

- Energinet System Operator play a special role in sector coupling and power-to-gas.
- In 2050, electricity and gas is assumed to be consumed very differently than today – as energy, but increasingly important as part of e-fuels, etc.

	2020	2030	2040	2050
EU				
GHG reduction		55 %		100 %
Denmark				
GHG reduction		70 %		100 %
Electricity – RE share	63 %	110 %		>100 %
Gas – Biomethane share	21 %	63 %	100 %	>100 %

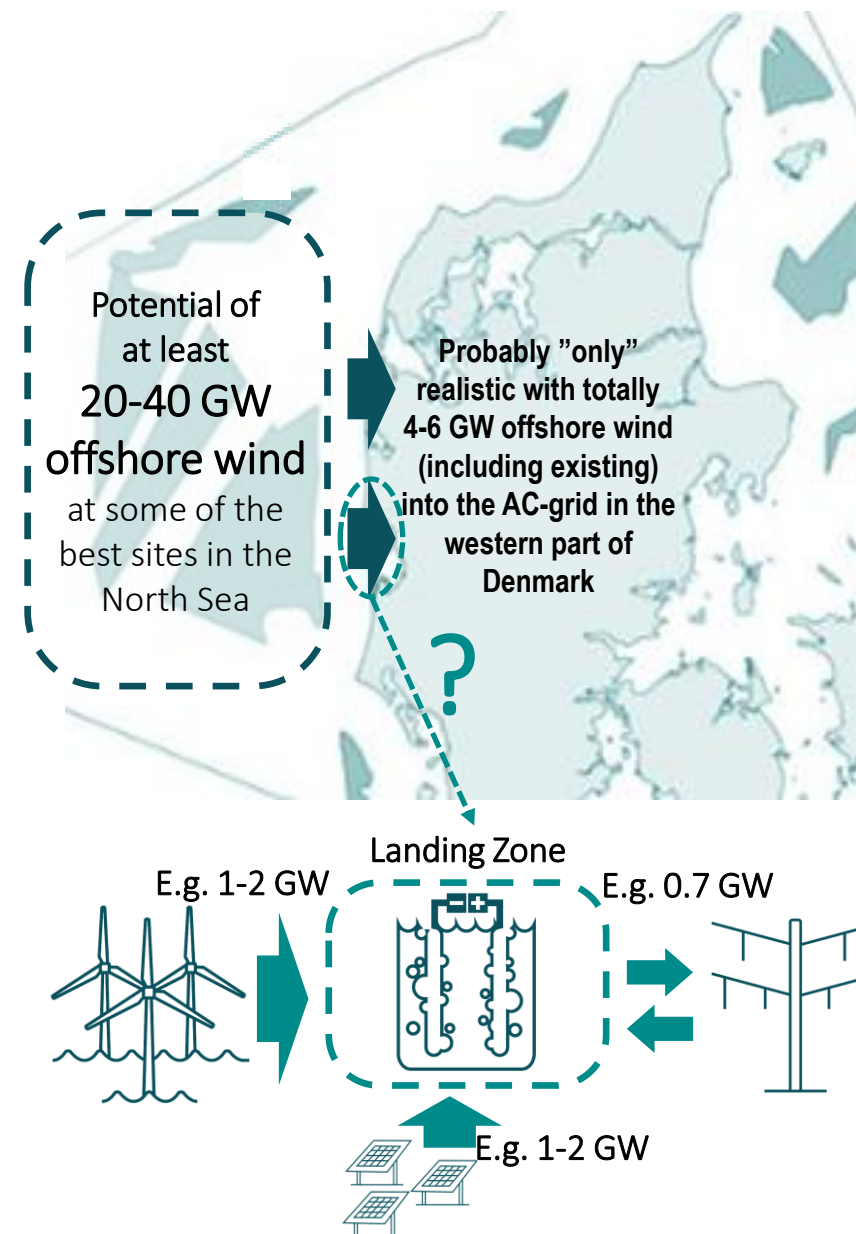


INTEGRATION OF LARGE SCALE OFFSHORE WIND

...and (semi-) large scale onshore wind and solar PV

Large scale electrolysis/PtX and multi GW offshore Wind in Denmark goes together

Without electrolysis/PtX it will be difficult and less attractive to install many GW new wind (and PV) in Denmark. Due to power price "cannibalism" and public challenges with expanding electrical infrastructure.

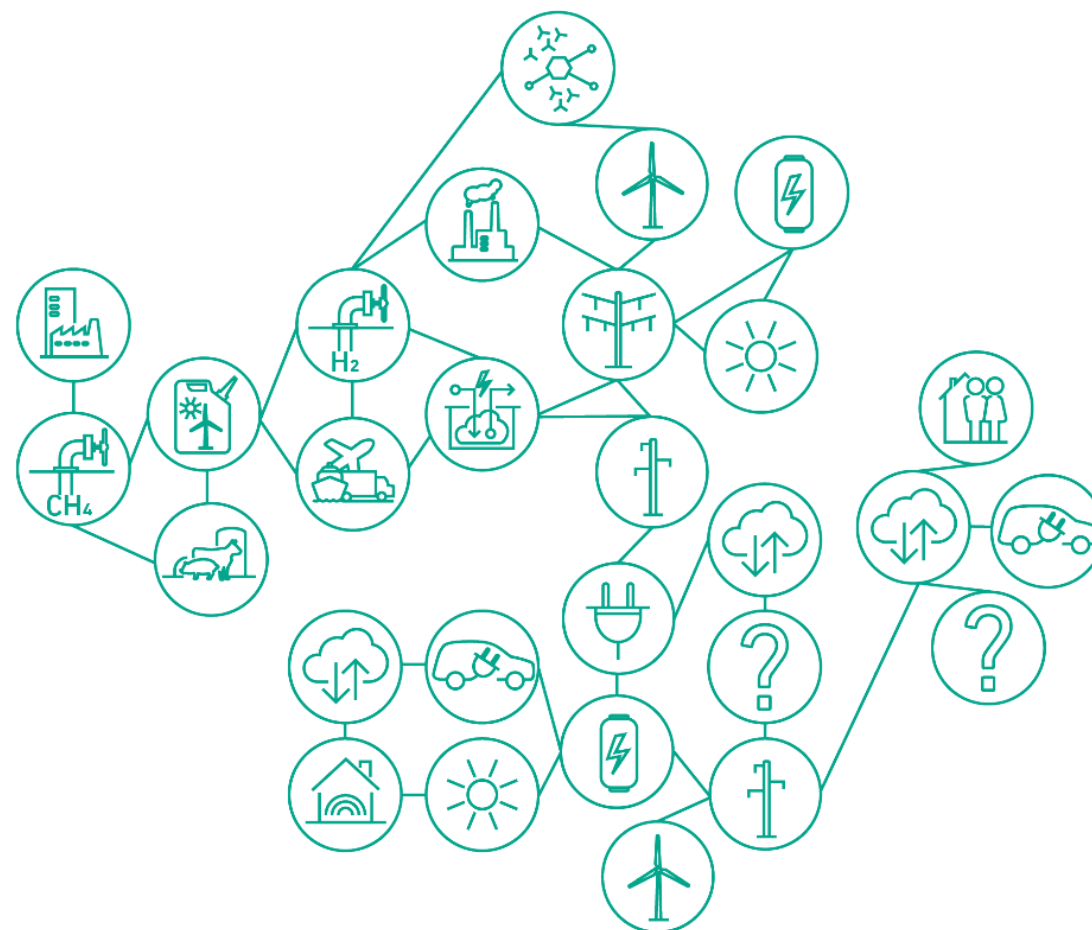


THE VALUE CHAIN – BEFORE AND IN THE FUTURE

BEFORE



IN THE FUTURE



QUESTIONS



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