STATUS AND PERSPECTIVES

- for gas in Denmark and Europe

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OUTLINE

- Infrastructure
- Green gasses
- Market
- Demand
- Security of supply
INVESTMENT IN INFRASTRUCTURE

- Integration of biogas
- Baltic Pipe
PART OF EUROPE
Regional and European coordination

- Regional planning (GRIP):
  - North West
  - Baltic Energy Market Interconnection Plan

- European planning
  - TYNDP
  - Scenarios with ENTSO-E
GREEN GAS DEVELOPMENT
FOCUS ON GREEN GASSES IN EUROPE

Green gas initiative (GGI) and Certificates across borders (ERGAR)
MARKET INTEGRATION

Increasing levels of convergence in supply costs are being observed in recent years, indicative of further market integration.

2015 calculated gas sourcing cost per EU MS compared to TTF (= 21.0 € /MWh)

- **<= 1 euro/MWh**
- **1-3 euro/MWh**
- **>3 euro/MWh**

- Influence of lower oil prices and gas oversupply
- Impact of reverse-flows
- Hub functioning
- Improved LNG competitiveness

As such, the dispersion in the energy component of retail prices across EU MSs tends to be lower in gas than in electricity.
DEVELOPMENT I DEMAND

Decrease in some sectors and increase in others with new applications
BLUE CORRIDOR

Demonstration of LNG for transportation

- Road map for LNG supply points
- Covering the area of the Atlantic, the Mediterranean and connecting southern Europe to the north and the west with the east.
- Establishment of facilities and test of vehicles
- 150 vehicles in Europe
- **Denmark is not participating**

http://lngbc.eu/
SECURITY OF SUPPLY DURING TYRA

2017 2019 2021 2023
SECURITY OF SUPPLY IN EUROPE

Eastern and Western Europe has different situations
ENERGY COMMISSION

Recommendations and conclusions for the gas system

ENERGIKOMMISSIONEN ANBEFALER

Det skal sikres, at gassystemet er fortsat velfungerende, og at gassen udnyttes effektivt i den grønne omstilling. Gassystemets rolle vil være bedre.

a. Den fossile naturgas skal i en overgangsperiode fortsat anvendes der, hvor det giver samfundsøkonomisk mening, og hvor grønne gasser potentielt kan være en løsning på sigt.

b. Det skal løbende vurderes, i takt med at teknologudviklingen ger de grønne gasser konkurrencedygtige, hvordan gassystemet bedst kan udnyttes i omstillingen til vedvarende energi.