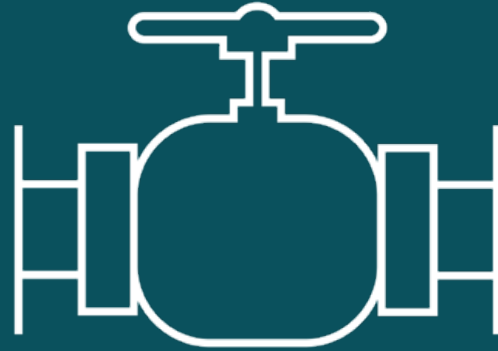


GASMARKNADSRÅD

Marknadsinformation Danmark

Camilla Mejdahl Mikkelsen, Energinet
8 June 2022



BIOMETHANE IN DENMARK

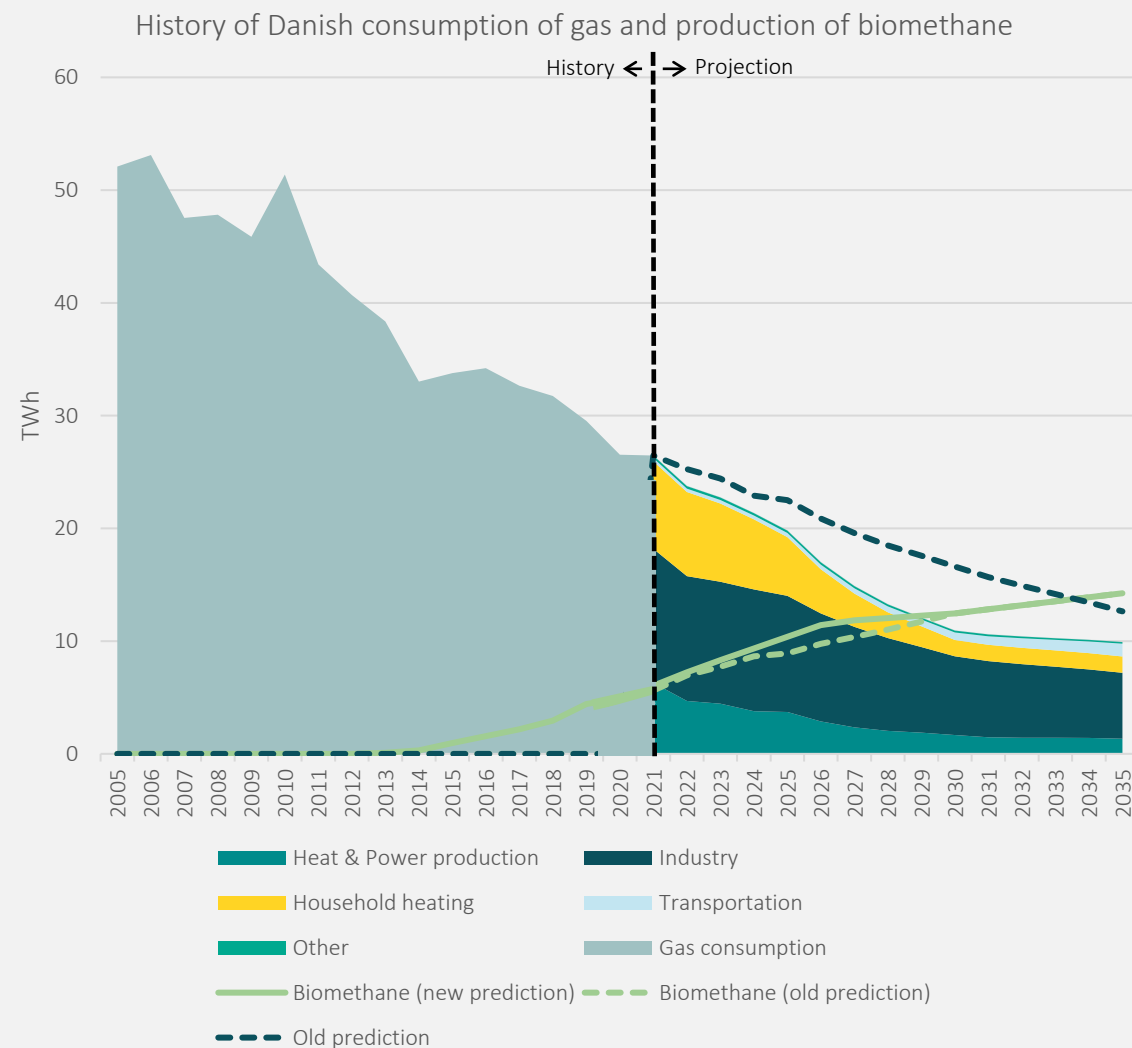
Past, present and future

THE GAS SYSTEM IS CHANGING

- Historically high – peak in 2005

The Danish Energy Agency project the production and consumption of gas based on political ambitions

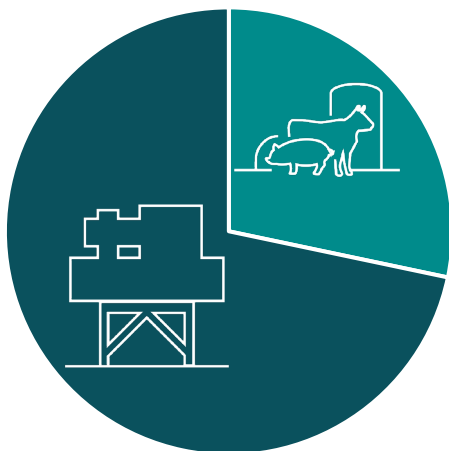
- Phasing out gas consumption for household and district heating
- Converting industry to green gas supply to reduce emissions from use of coal and oil.
- Growth in production of green gas – towards +100%



A FUTURE WITH A GREEN GAS SECTOR

Development in Denmark's gas consumption

2022



23 TWh
RE: 30 pct. of
domestic gas
consumption

2025



20 TWh
RE: 52 pct. of
domestic gas
consumption

2030



11 TWh
RE: 114 pct. of
domestic gas
consumption



Challenges

- Natural gas is not 100 pct. green
- Decreasing gas consumption
- Local surpluses of biogas



Opportunities

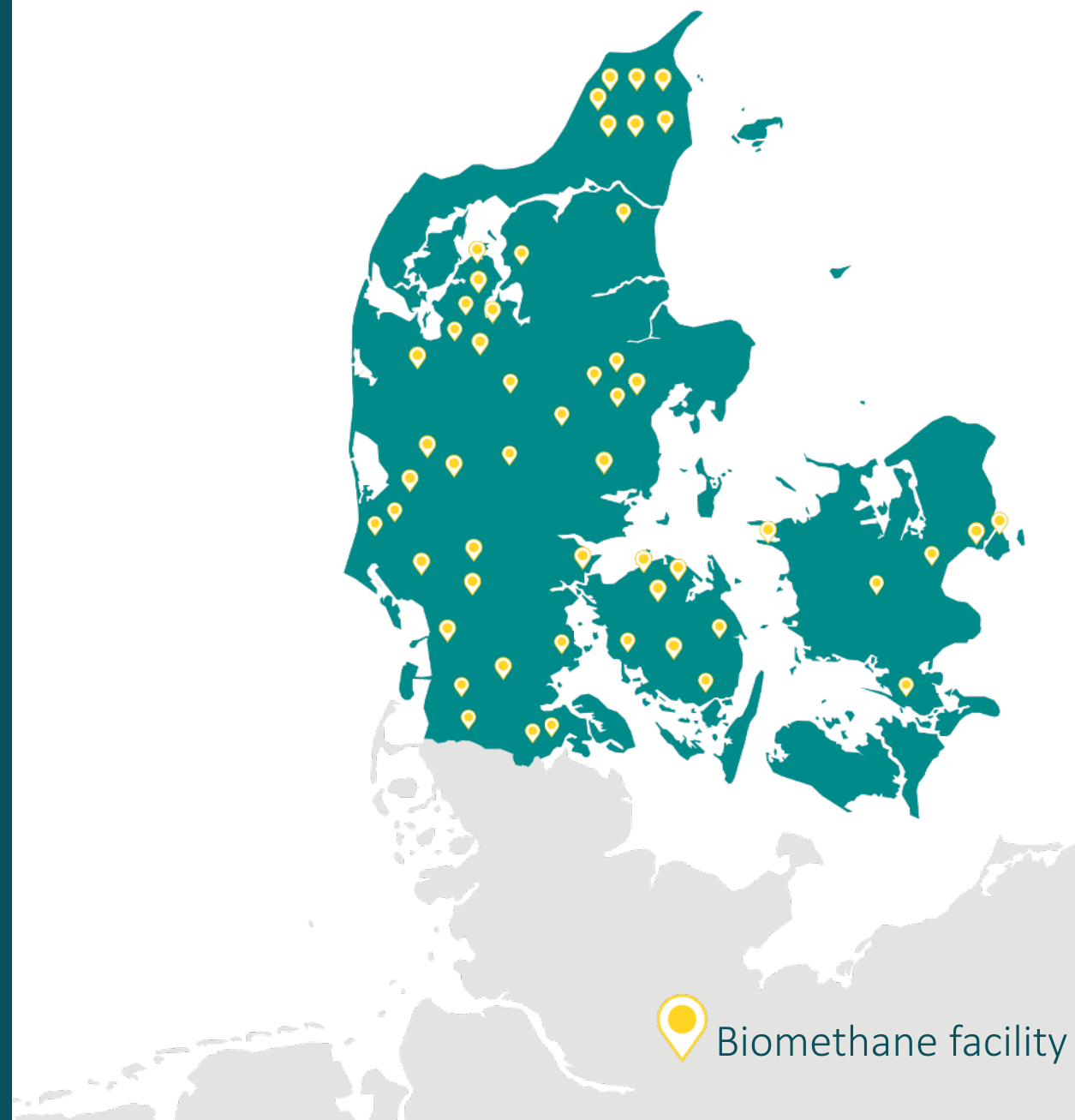
- Export of biomethane.
- Baltic Pipe utilize existing grid and support Polish green transition
- Heavy industry as gas consumers
- PtX and Hydrogen

GAS GOES GREEN

- 57 biomethane facilities
- 34 new biomethane facilities in pipeline
- Improves security of supply

A future with other types of green gas:

- Electricity to gas (methanation)
- Pyrolysis
- Thermal gasification
- New technology?

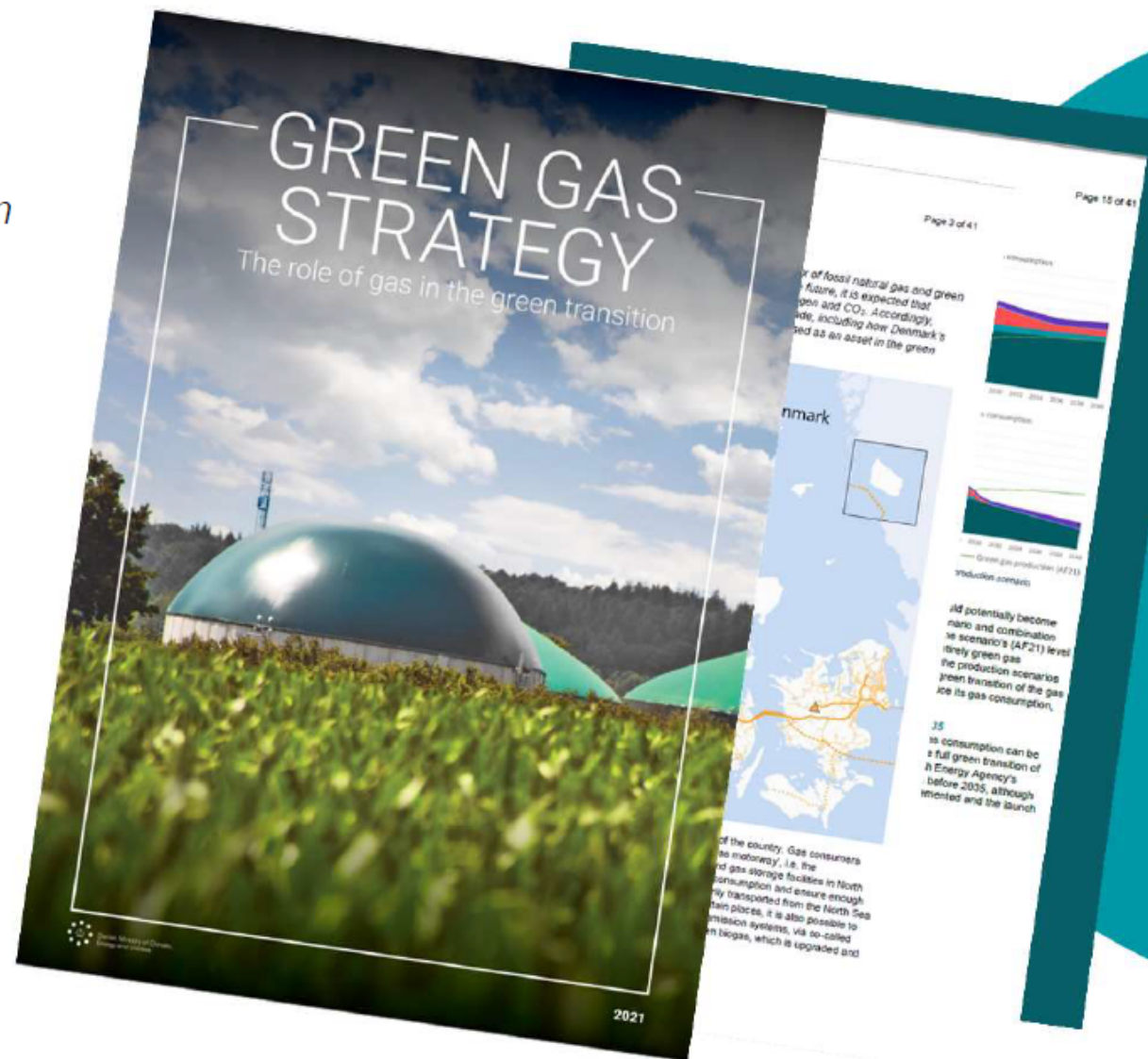


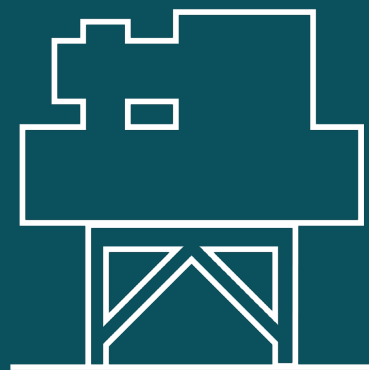
Green gas Strategy

Published December 2021

Energy Agreement 2018:

- Agreement of the Folketing to prepare a Danish strategy for the Danish gas infrastructure and regulation in order to secure at continuous commercial utilization of the gas infrastructure within the green transition.
- The strategy is based on continuous work in parallel with the climate agenda
- Simultaneously with the electricity and PtX strategies
- More than 50 upgrading biogas plants in Denmark
- Governmental ambition to have 100 pct. green gas in 2034 – now 2030
- Input for the current negotiations on actions plans as response to the current gas crisis





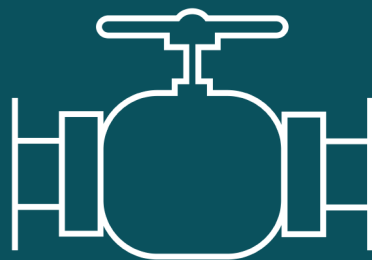
TYRA



TYRA REOPENING

- Platform to reopen as planned*:
- 1st of June 2023
- Security of Supply during renovation evaluated as stable
Gasforsyningen under renovering af Tyra 2019-2023
| Energinet

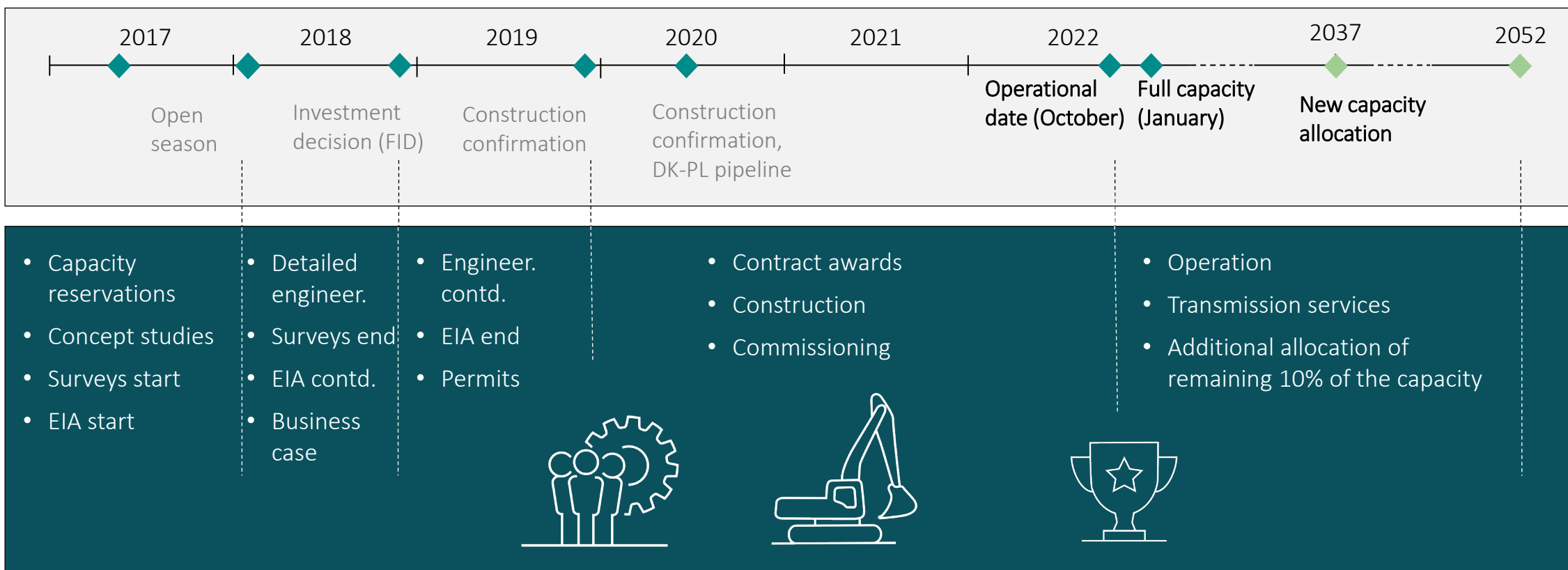
*Reopening postponed back in 2020



BALTIC PIPE

BALTIC PIPE PROJECT – ALMOST THERE

Despite challenges with revoked environmental permit (mice concerns)



FINALIZING REMAINING PIPE LAYING TOWARDS JANUARY FIRST (WHERE EXISTING SYSTEM IS OPERATIONAL) **ENERGINET**



Yellow parts currently being finalized



Assembled



Covered

CURRENT FOCUS (TOWARDS OCTOBER FIRST)



Offshore project completed
Getting the Nybro terminal operational



Getting the compressor station operational

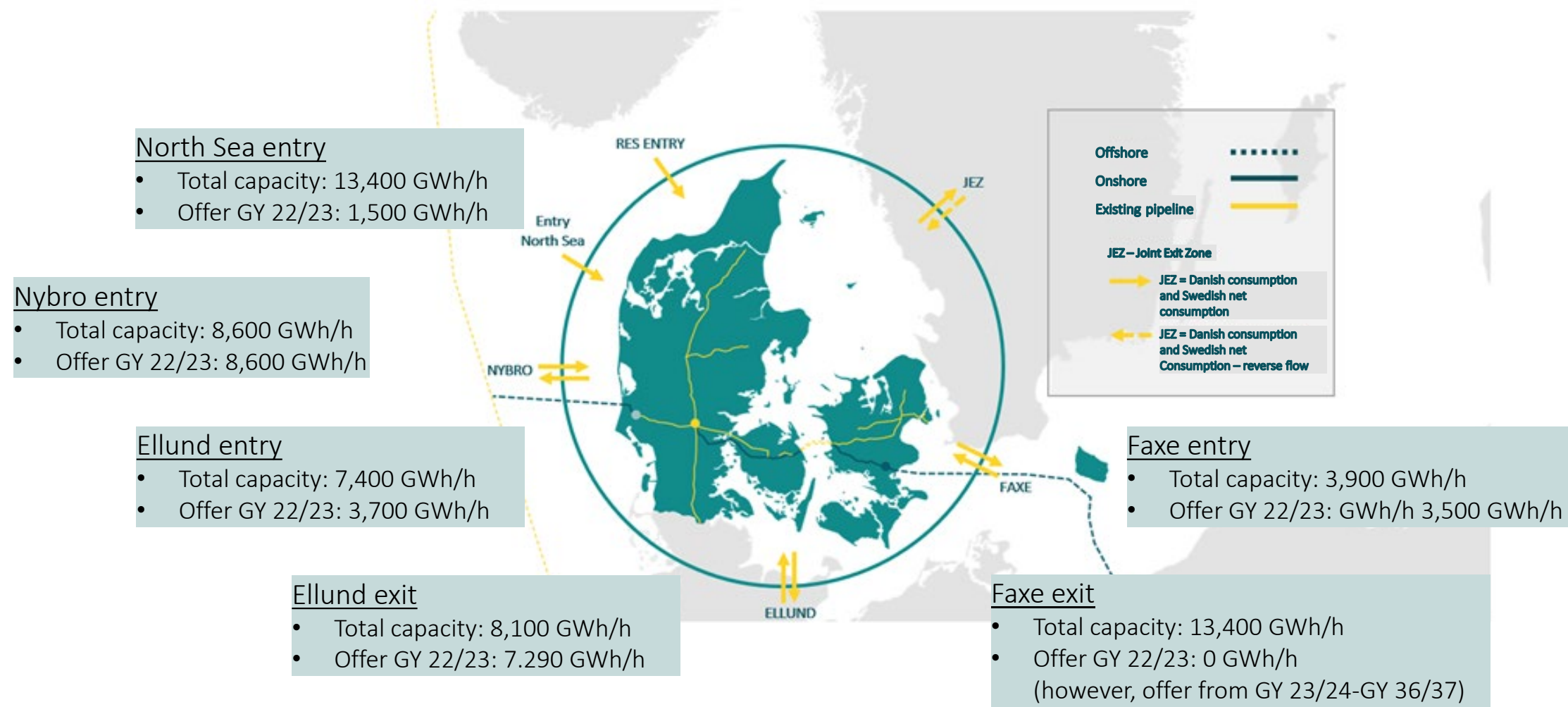
TIME PLAN AS PREVIOUSLY REPORTED

Partial capacity from 1 October 2022, by using parts of the existing gas transmission system in Denmark.

1 January 2023, the entire project is expected to be operational at full annual capacity of up to 10 BCM.



ANNUAL CAPACITY OFFER FOR COMING GAS YEAR BALTIC PIPE AND ENTRY/EXIT POINTS



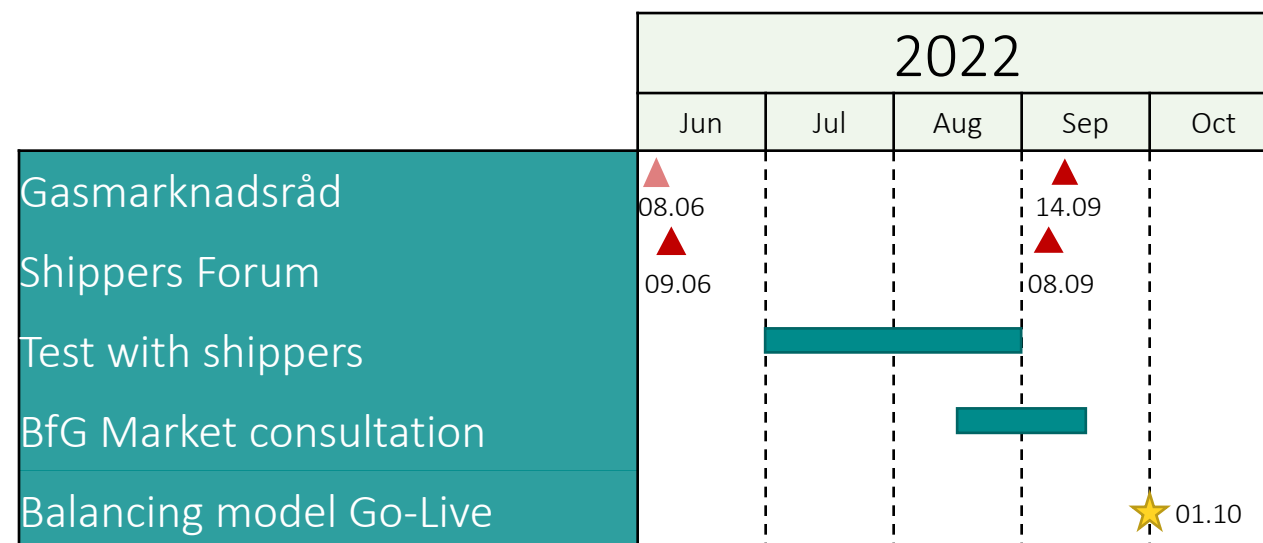
BALANCE MODEL ON TRACK

Sopra Steria test with shippers ongoing over July-August

Message format has been announced March 2022:

- [Secure Communication | Energinet](#)

Always open for bilateral meetings for more detailed information should need be



FURTHER DIALOGUE & INFORMATION



Q&A ON BALANCING DETAILS

- End June
- Available on website
- Updated continuously

Send questions to:

CRU@energinet.dk / JLO@energinet.dk



WORKSHOP*

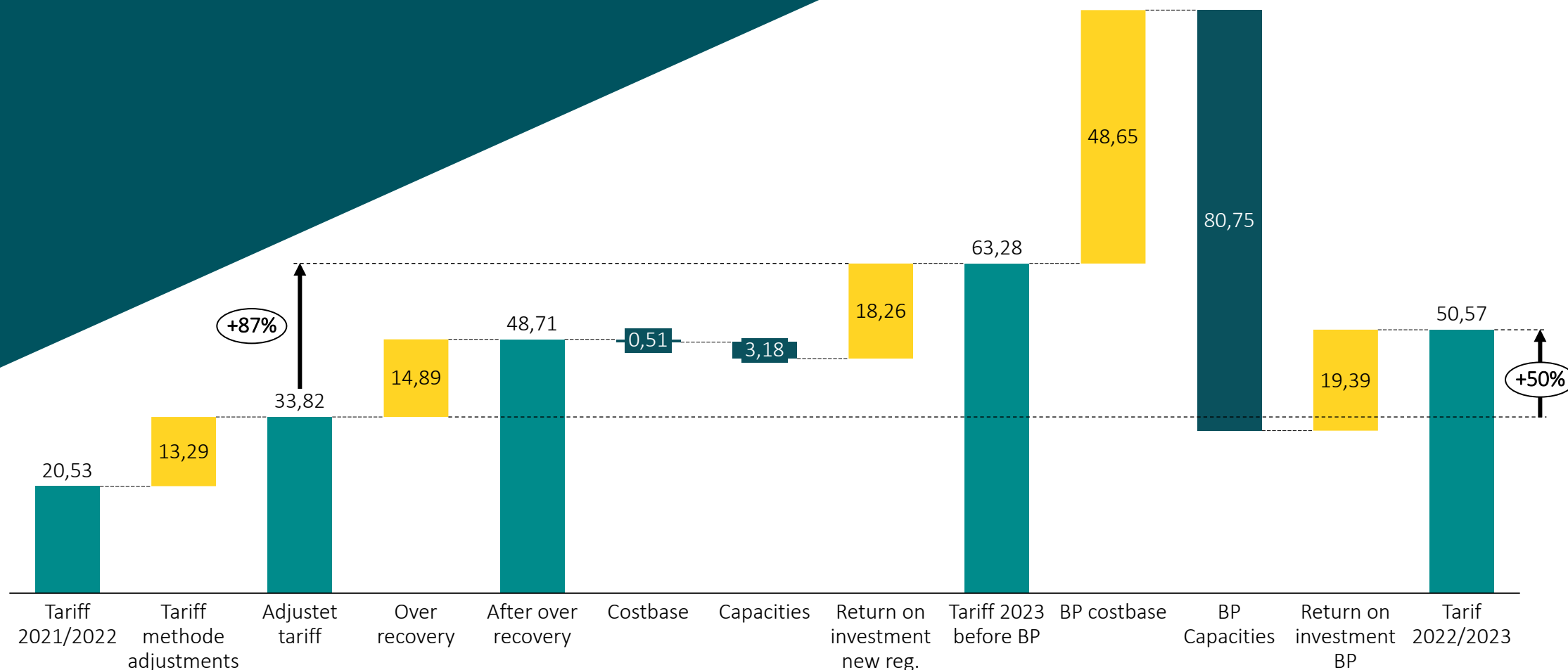
- Mid August
- User group
- General & test-related questions

*Arranged based on interest from shippers



TARIFFS 2022/2023

TARIFF EFFECTS 2022-2023 (DKK/KWH/H/YEAR)



SHIPPERS' FORUM

9 JUNE 2022



PROGRAMME

- 13.00 Welcome – Clement Johan Ulrichsen, Energinet
- 13.10 Supply situation – Christian Meiniche Andersen, Energinet
- 13.25 Storage filling – Jane Glinvad, Danish Energy Agency
- 13.40 Gas Storage Denmark – Iliana Nygaard, Gas Storage Denmark
- 13.55 Gas Market Report 2021 – Peter Lyk-Nielsen, Danish Utility Regulator
- 14:25 BREAK*
- 14:55 Baltic Pipe – Christian Rutherford, Energinet
- 15.20 Tariffs – Nina Synnest, Energinet
- 15.40 Hydrogen infrastructure in light of the political PtX-agreement – Nicolai Sørensen, Energinet
- 15:55 Final remarks – Clement Johan Ulrichsen, Energinet

QUESTIONS



Contact: cmj@energinet.dk