



## NECP Poland and impact on P2H

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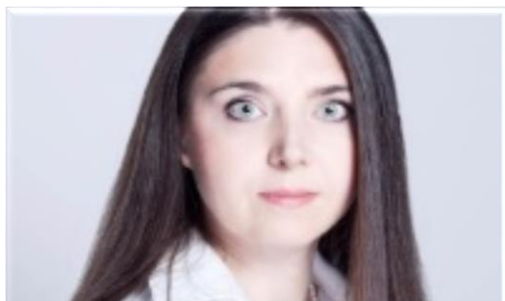
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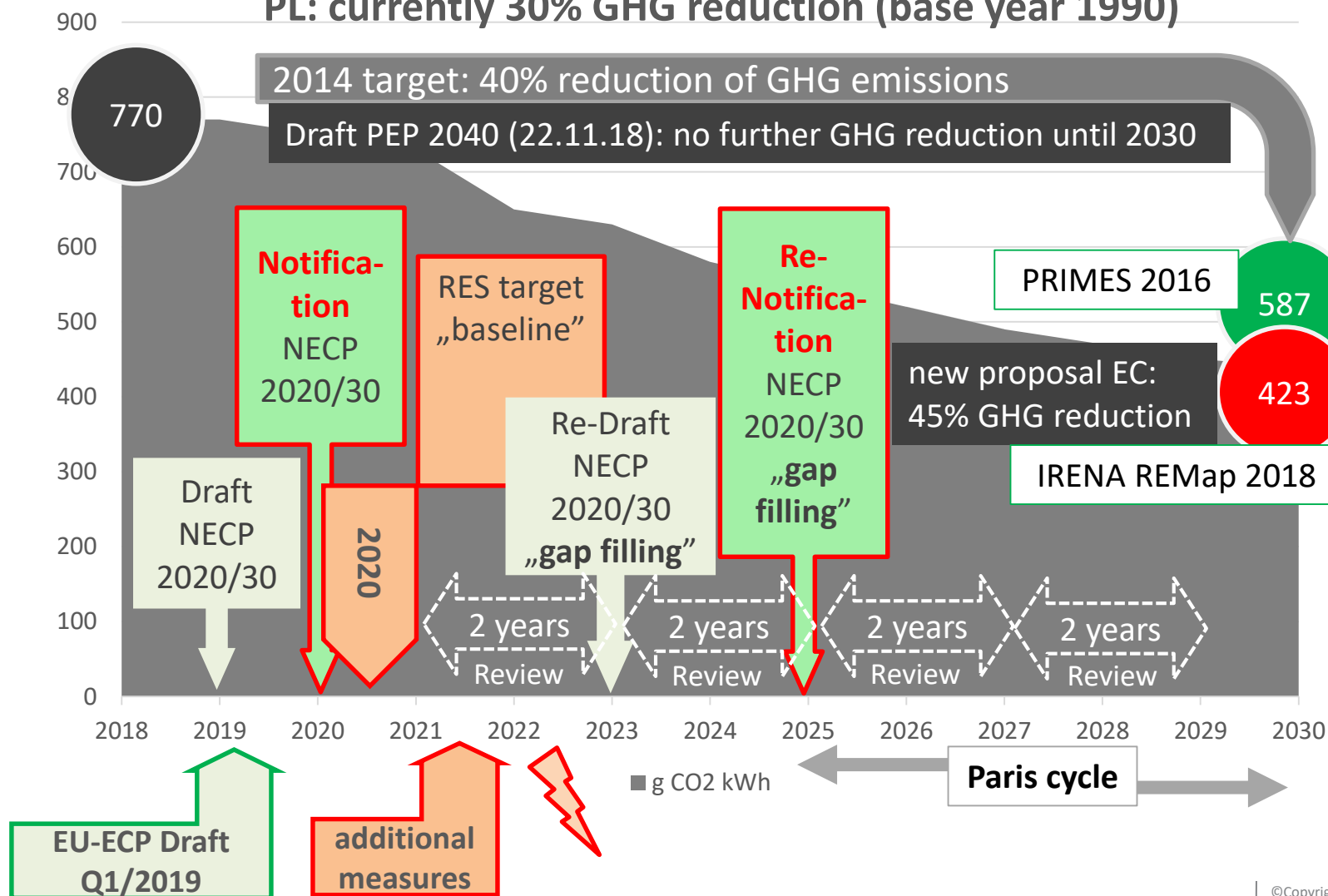
- over 100 professionals in CEE
- 15m€ group turnover
- mid-sized transaction and investment boutiques in seven CEE countries



# National Energy and Climate Plan (NECP)

Notification of all „**policies and measures**” until 2030

PL: currently 30% GHG reduction (base year 1990)



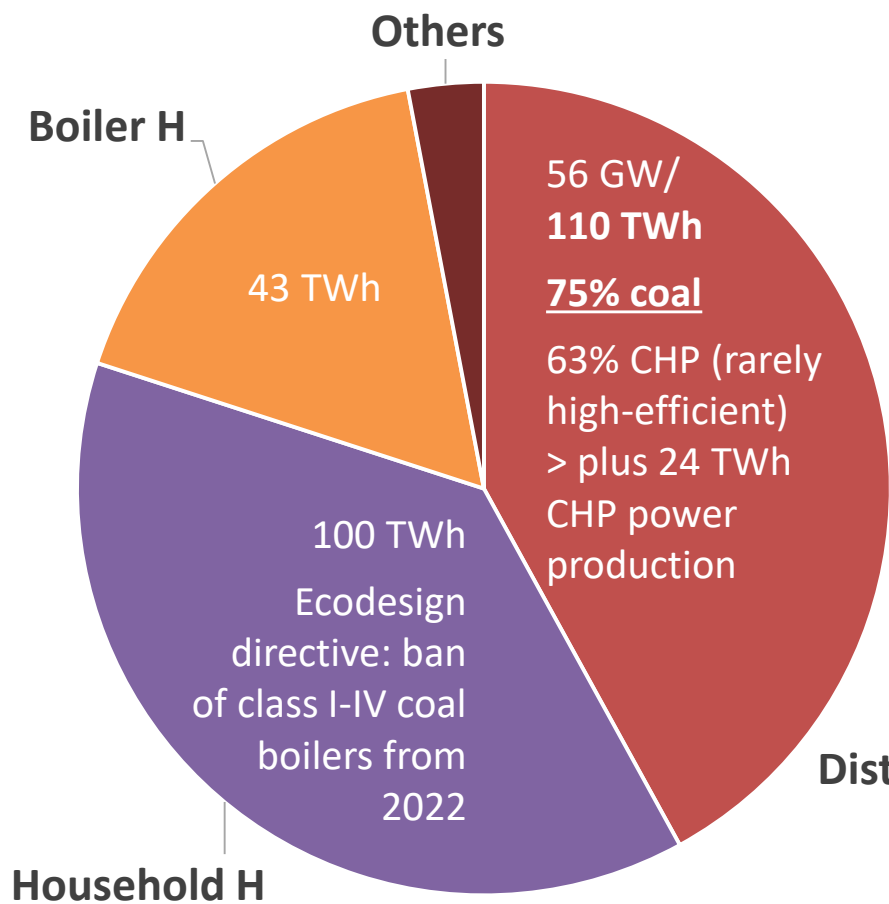
- RES 2020 target - 15%
- RES 2017 - 11.0% (384 TJ) – decrease from 11.8% in 2015
- Wood biomass in old furnaces constitutes 55% (200 TJ) of RES 2017 share (statistics are artificially increased by 40%)
- Impact of 2018 RES auction: 15 TJ

## IRENA REMAP Scenario

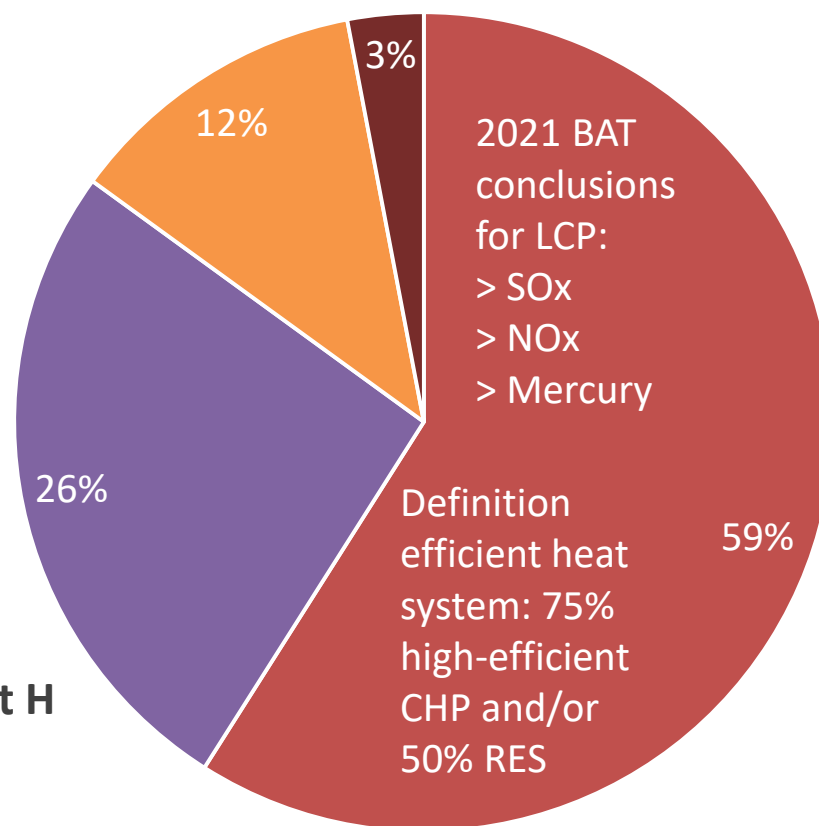
- Poland’s RES-electricity share in 2030 according to REMap is **38%** [general RES share 28%], coal share 35%, nuclear share 7% [unrealistic assumption, missing nuclear strategy provides to increased RES-e share]
- RES share transport 5% → 13% „e-mobility”
- RES share industry 11% → 28%
- RES share buildings 12% → 37% (12% incl. wood biomass/see above)

## Consumer heat market in Poland

### Consumer heat general



### Consumer heat in cities

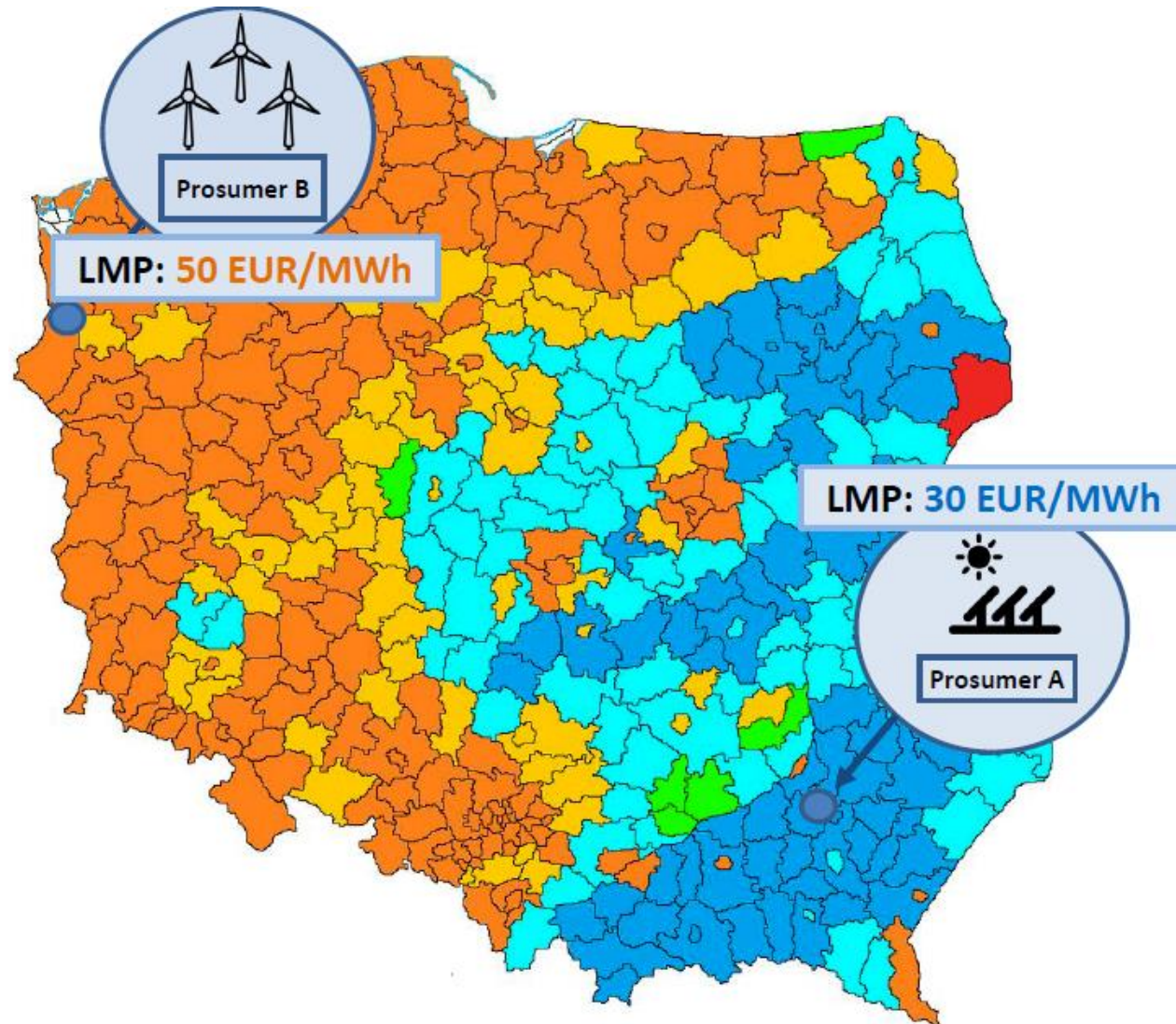


IED: in 08/2021 derogation of LCP - 16 GW 200-500 MW<sup>th</sup> and 10 GW 50-200 MW<sup>th</sup>

MCP Directive: derogation of units from 5-50 MW<sup>th</sup> end of 2024 and 1-5 MW<sup>th</sup> end of 2029

- IED and MCP provide to de-commissioning of coal assets
- Efficient heat systems only in large cities

## Nodal Pricing initiative by PSE

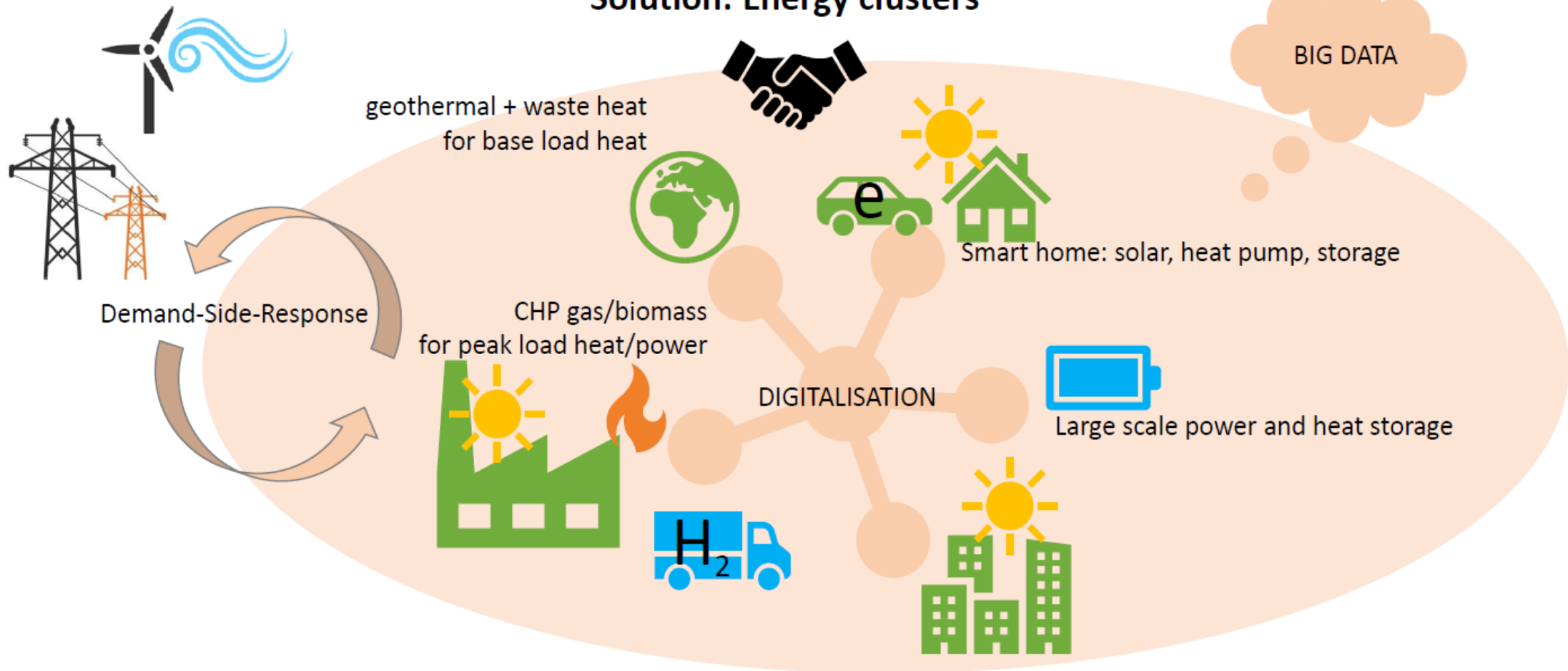


- PSE (responsible person: *Konrad Purchala, director market development*) pushes at entso-e level for implementation of Nodal Pricing (locational marginal pricing) as a new market design, to be introduced for a testing period in the Polish balancing market
- Generally no objection from the EU Commission against Nodal pricing, ongoing discussion during implementation of the „winter package”, PSE is heading working group at entso-e
- Goals: lower security margins, better network utilization, efficient use of resources, better market information, incentives for innovations

- Nodal Pricing pushes for decentralized energy markets
- Nodal Pricing should protect against scarcity

## Vision for heat markets by NFOSiGW

### Solution: Energy clusters



- Heat systems require complete modernization
- Role of industrial energy generation and P2H increases

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