The Eurogas Roadmap 2050

Sector Social Dialogue Committee on Gas
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Members’ areas of activity

Wholesale and retail

Distribution
Members
• 33 companies
• 17 associations

Eurogas Roadmap 2050
80% carbon dioxide reductions
By 2050 compared with 1990
In energy related sectors
Energy related sectors + reductions

- Residential & Services: -71%
- Industry: -83%
- Transport: -69%
- Power generation: -93%

What is needed in the future?

- Energy efficiency
- Behaviour change
- Renovation
- Switching to gas technologies
- Promotion of hybrid technologies
Industrial sector

**The sector today:**
- 15% of CO\(_2\) emissions
- Natural gas 30% market share
- Energy intensity gains achieved
- Mostly covered by ETS

**What is needed in the future?**
- Maintain EU industry
- Ensure EU industry competitiveness
- Switching to less polluting alternatives
- CCS after 2030

Transport sector

**The sector today:**
- 30% of CO\(_2\) emissions
- Quasi-monopoly of oil with 95%
- 70% of energy used by cars
- Natural gas is a niche with 0,4%

**What is needed in the future?**
- Switch to alternatives, e.g. gas/biomethane
- More action on NO\(_x\), particulates and noise
- Support infrastructure for alternatives
- Promote public transport
- Use rail + waterways more for freight
- Behaviour change
Power sector

The sector today:
• 35% of CO₂ emissions.
• Nuclear: 28%, Coal: 26%, Gas: 22%
• CHP represents 22%

What is needed in the future?
• Switch to renewables
• Switch to gas
• Gas and renewables
• No lock-in
• CCS after 2030

Primary energy consumption
Gas increases its share + supports renewables

Data for 2010 are estimates
Gas consumption enables progress towards a low-carbon economy

*incl. district heating, raw material and energy branch

Data for 2010 are estimates

Emissions
Down, thanks to fuel switch to gas and increased energy efficiency in the short and medium term

Data for 2010: ProspEner tool
What are the EU issues around gas?

- Clear demand signals
- Good relations with exporting and transit countries
- Full, speedy + harmonised implementation of EU internal market
- Better information to the public

Comparison: Commission Energy Roadmap Eurogas Roadmap

What do they have in common?

- Focus on energy efficiency
- Substitution of high carbon fuels in power generation and transport
- Implementation of CCS
Comparison: Commission Energy Roadmap
Eurogas Roadmap

Where is the Energy Roadmap different?

- Predominant role of electricity in residential, services and transport sectors
- No potential explored for natural gas in transport
- No more role for natural gas except for electricity back-up generation

Consequences of Energy Roadmap:

- Large investments in the electricity distribution system due to the penetration of RES
- Less use of the gas distribution and storage infrastructures in place – Stranded costs!
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