

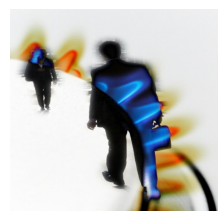
The Eurogas Roadmap 2050

Sector Social Dialogue Committee on Gas
Brussels, 16 April 2012

Beate Raabe
Secretary General



Members' areas of activity



Wholesale and retail

Distribution



Members

- 33 companies
- 17 associations

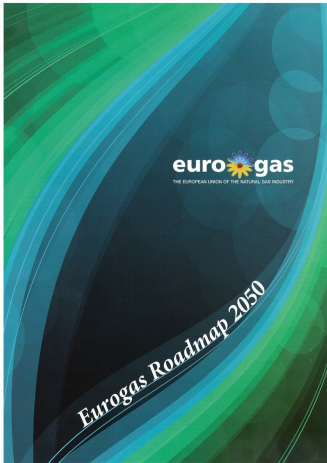


The image shows a map of Europe with various logos of member companies and associations overlaid on different regions. The logos include Gasum, E.ON Energy, ENI, AGN, and many others. The euro gas logo is visible in the bottom right corner of the map area.

euro gas

3

Eurogas Roadmap 2050

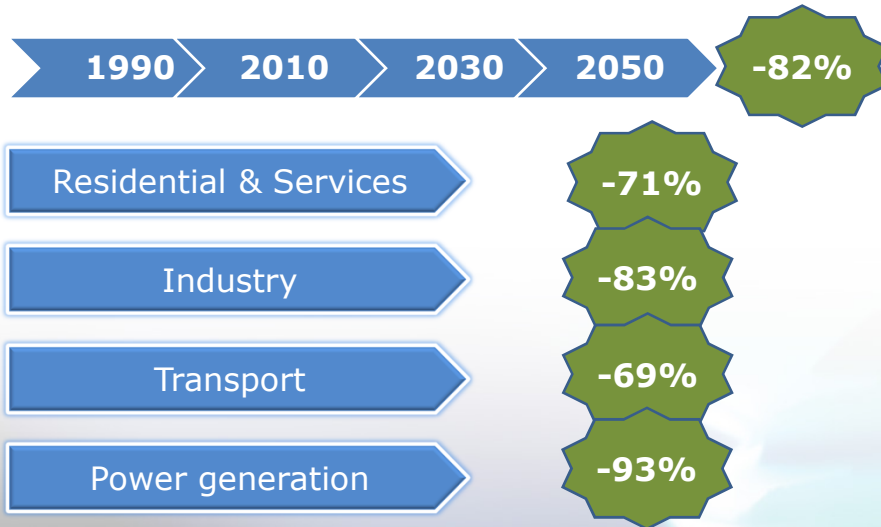


The cover of the Eurogas Roadmap 2050 document features the euro gas logo and the text "Eurogas Roadmap 2050" on a green and blue background.

- 80% carbon dioxide reductions
- By 2050 compared with 1990
- In energy related sectors

4

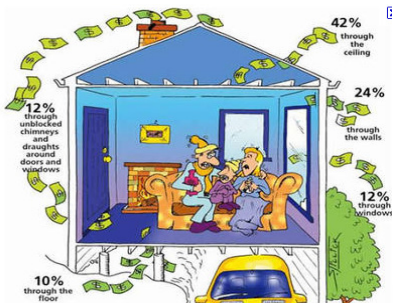
Energy related sectors + reductions



5

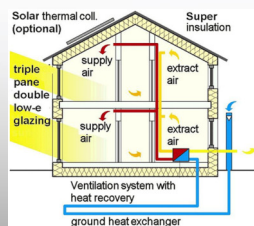
Residential and Services

-71%



The sector today:

- 18% of CO₂ emissions
- 200 million households
- 5.5 billion m² of offices
- 70% of energy use for heating
- Gas leader with 40%



What is needed in the future ?

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

6

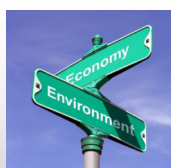
Industrial sector

-83%



The sector today:

- 15% of CO₂ 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

7

Transport sector

-69%



The sector today:

- 30% of CO₂ 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

8

Power sector

-93%



The sector today:

- 35% of CO₂ emissions.
- Nuclear:28%, Coal: 26%, Gas:22%
- CHP represents 22%



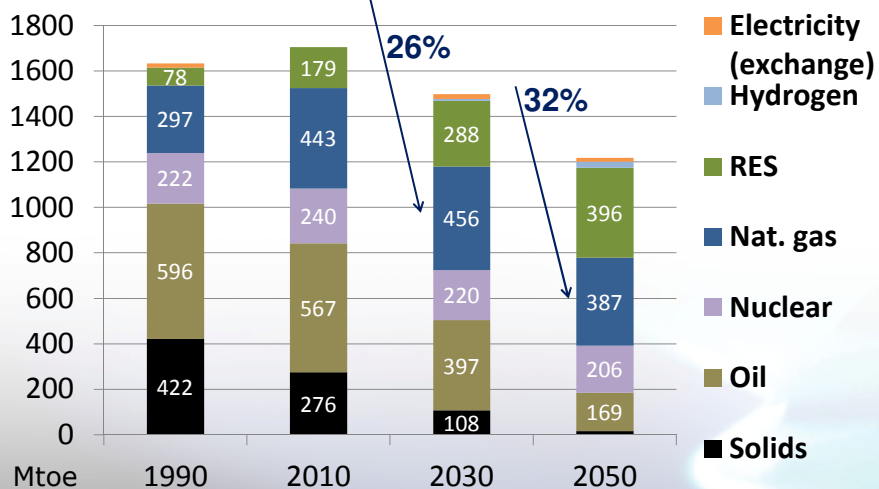
What is needed in the future?

- Switch to renewables
- Switch to gas
- Gas and renewables
- No lock-in
- CCS after 2030

9

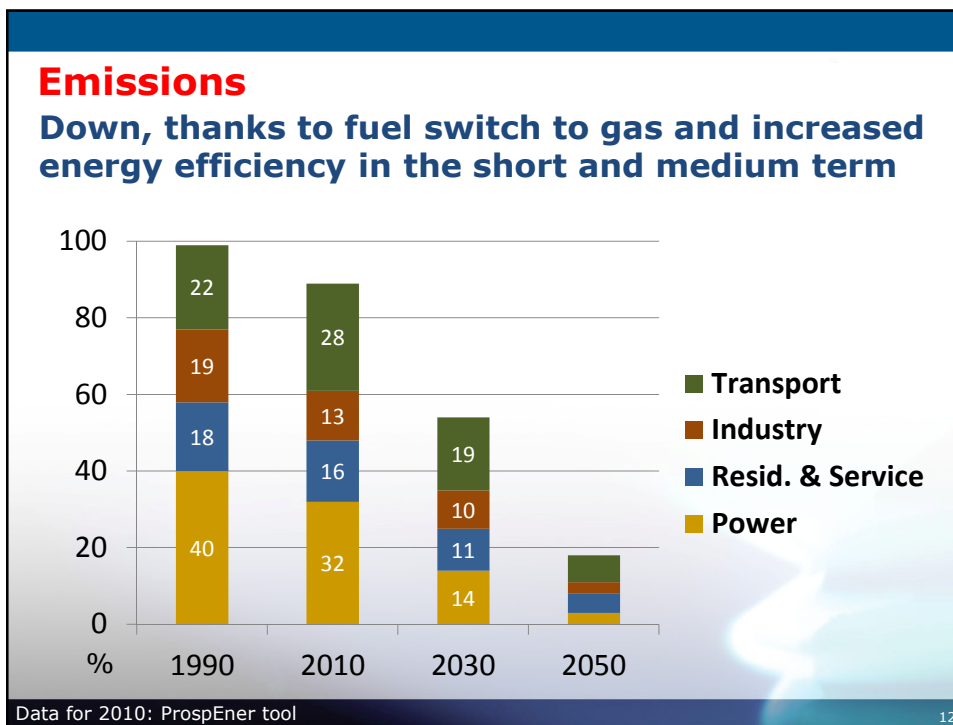
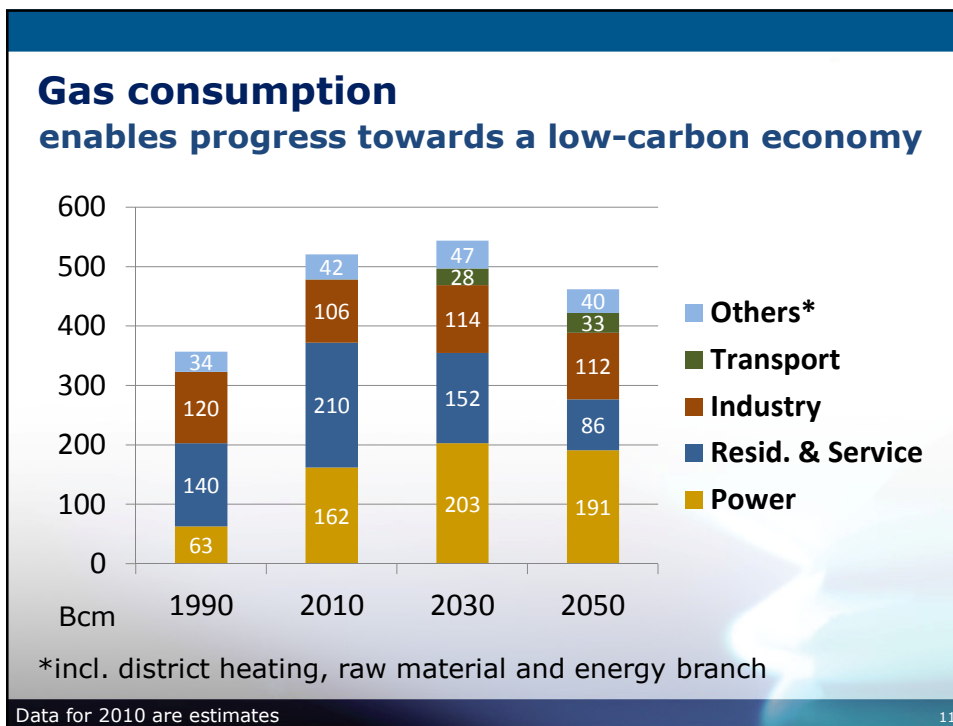
Primary energy consumption

Gas increases its share + supports renewables



Data for 2010 are estimates

10



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**



15

Comparison: Commission Energy Roadmap Eurogas Roadmap

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!**



16

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