

Future gas demand in the EU EC's Long Term Strategy

ENSTOG workshop on the supply potentials and
market related assumptions for TYNDP 2020
10/07/2019

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European Commission

A decade of modelling for EU energy & climate policy

2008

2011

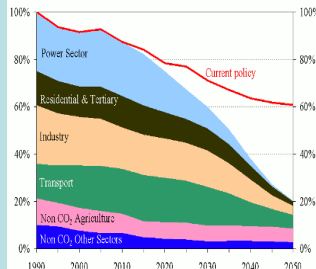
2014

2015

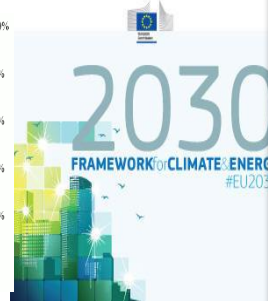
2016-2017

2018

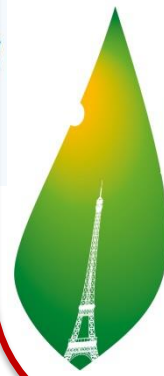
2050 Energy & Low Carbon Roadmaps



2020 EU Climate and Energy Package



Towards an Energy Union #EnergyUnion



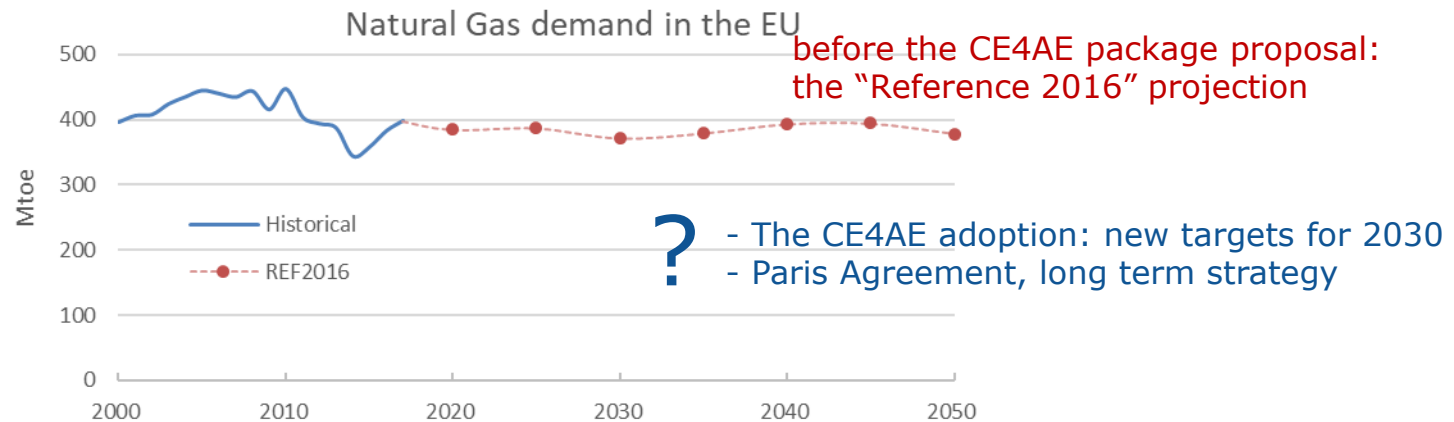
COP21 • CMP11 PARIS 2015 UN CLIMATE CHANGE CONFERENCE

Clean Energy Package

- Effort Sharing Decision
- LULUCF
- Energy Efficiency
- Transport Decarbonisation
- Renewable Energy
- Market Design
- Governance



Future gas demand in the EU: Reference 2016

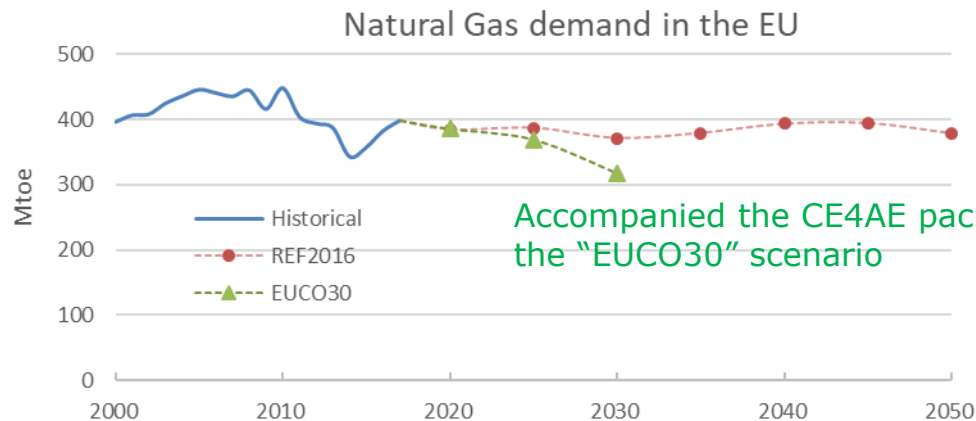


Sources:

- Eurostat (2000-2017)

- Reference 2016: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>

Future gas demand in the EU: EUCO30



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>



The Long Term Strategy

Political context

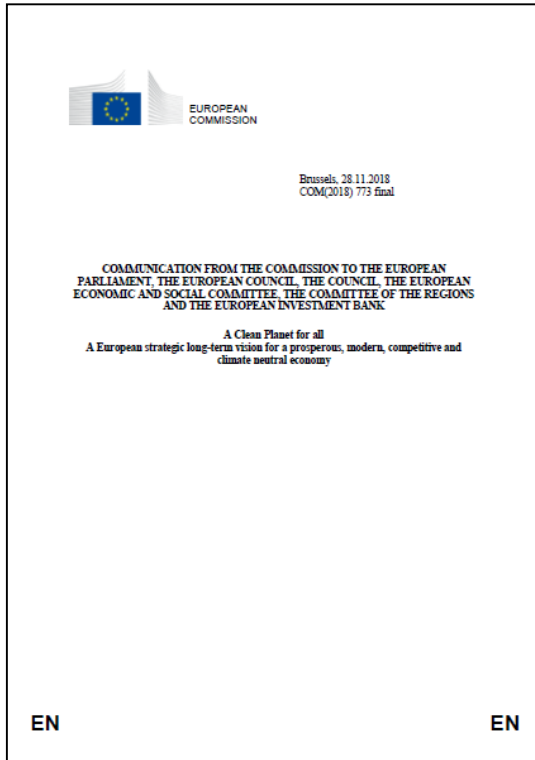
- Parties of the Paris Agreement to present long-term low greenhouse gas emission development strategies by 2020
- In October 2017 the European Parliament also invited the Commission "*to prepare by COP24 a mid-century zero emissions strategy for the EU*"
- In March 2018, European Council invited the Commission "*to present by the first quarter of 2019 a proposal for a Strategy for long-term EU greenhouse gas emissions reduction*".
- Regulation on Governance of the Energy Union calls on the Commission to present an EU long-term strategy by April 2019, including pathways that achieve net zero GHG emissions by 2050 and negative emissions thereafter



European
Commission

Communication on the proposed Long Term Strategy, 25 pages

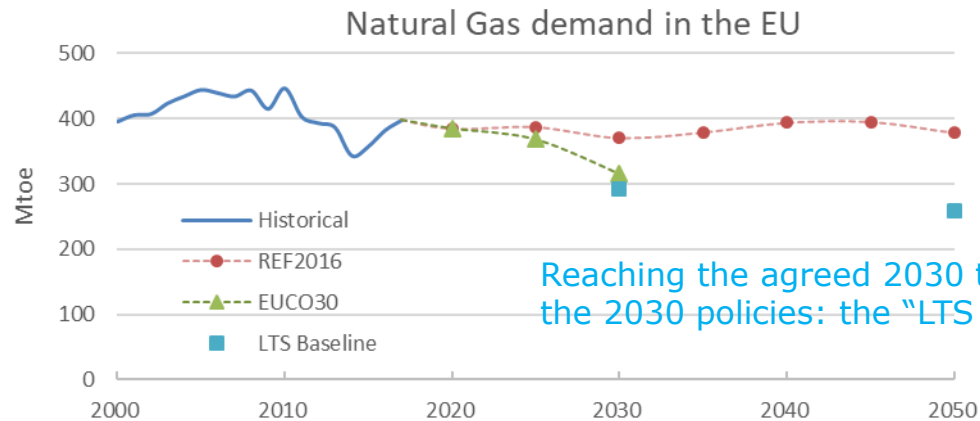
https://ec.europa.eu/clima/sites/clima/files/docs/pages/com_2018_733_en.pdf



In depth analysis supporting the Communication, Long Term Strategy, 393 pages

https://ec.europa.eu/clima/sites/clima/files/docs/pages/com_2018_733_analysis_in_support_en_0.pdf

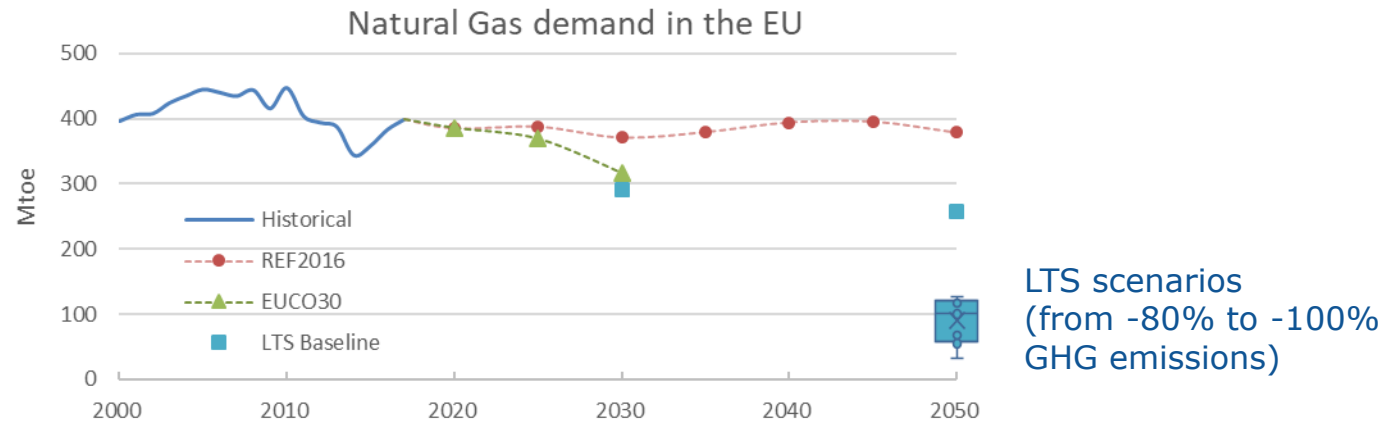
Future gas demand in the EU: Long Term Strategy Baseline



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en

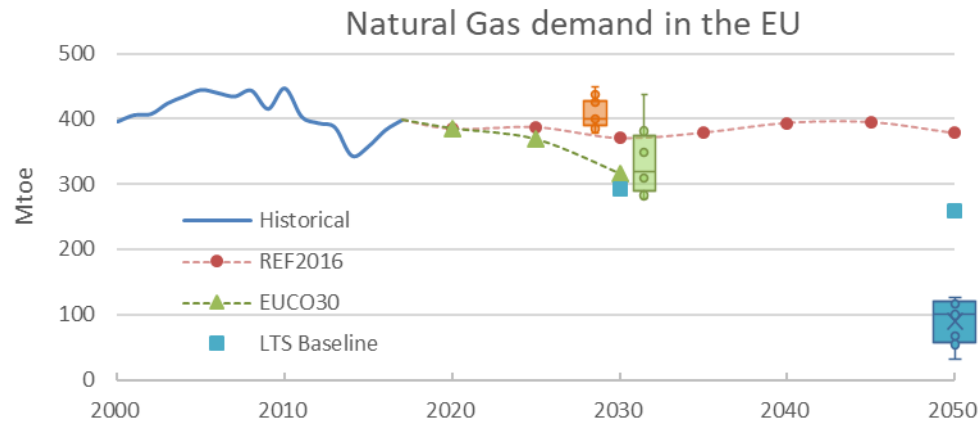
Future gas demand in the EU: Long Term Strategy Scenarios



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en

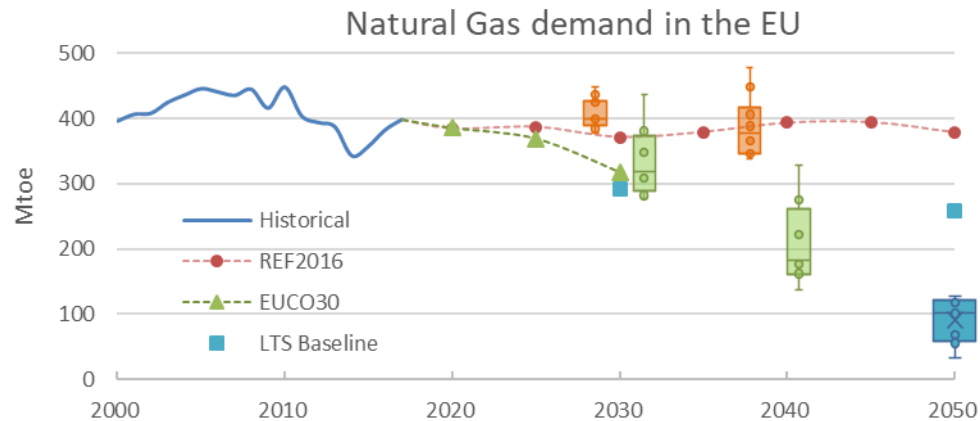
Future gas demand in the EU Comparison with others: 2030



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en
- IEA: WEO 2018, WEO 2017, ETP 2017
- JRC: GECO 2018, GECO 2017: <https://ec.europa.eu/jrc/en/geco>
- BP 2018, Shell 2018, Oko Institute 2017

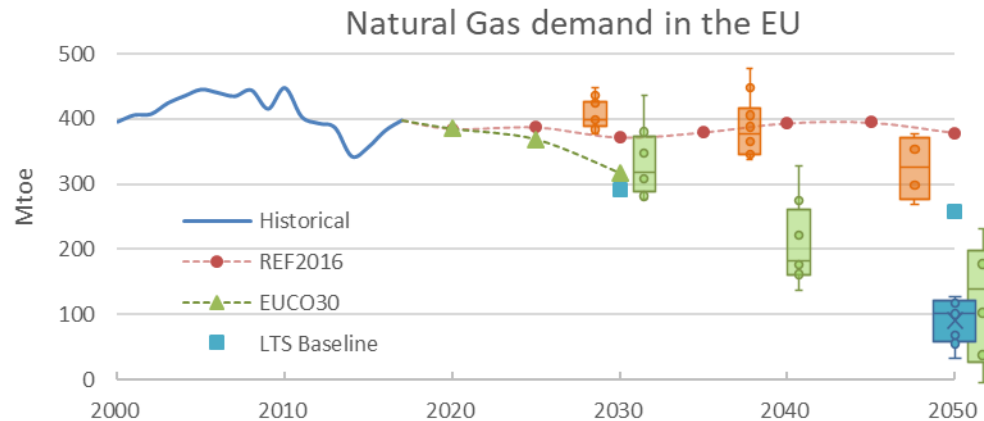
Future gas demand in the EU Comparison with others: 2040



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en
- IEA: WEO 2018, WEO 2017, ETP 2017
- JRC: GECO 2018, GECO 2017: <https://ec.europa.eu/jrc/en/geco>
- BP 2018, Shell 2018, Oko Institute 2017

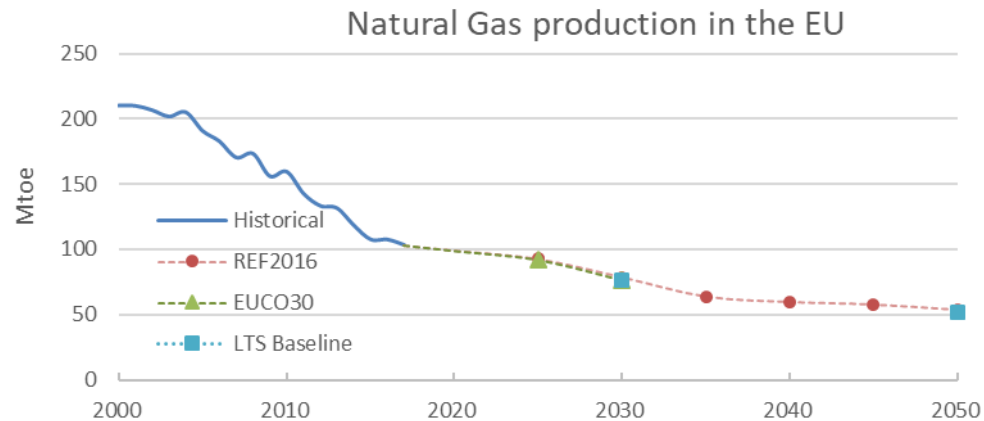
Future gas demand in the EU Comparison with others: 2050



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en
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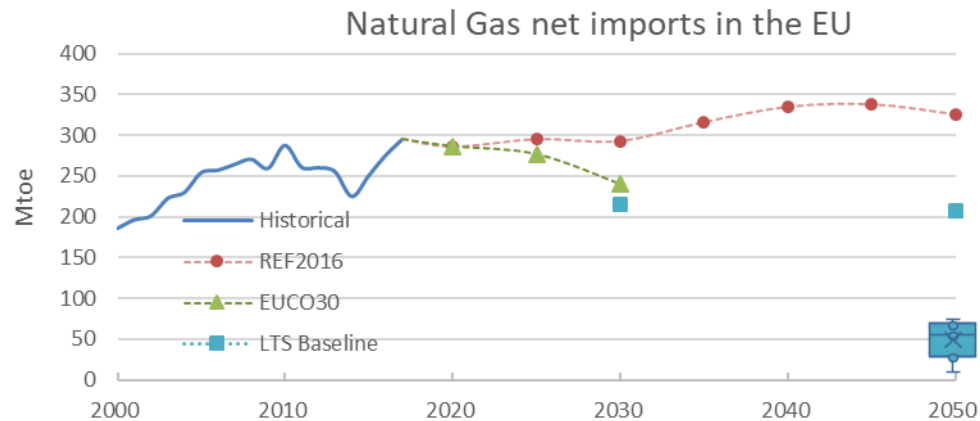
Future gas production in the EU



Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en

Future natural gas imports in the EU



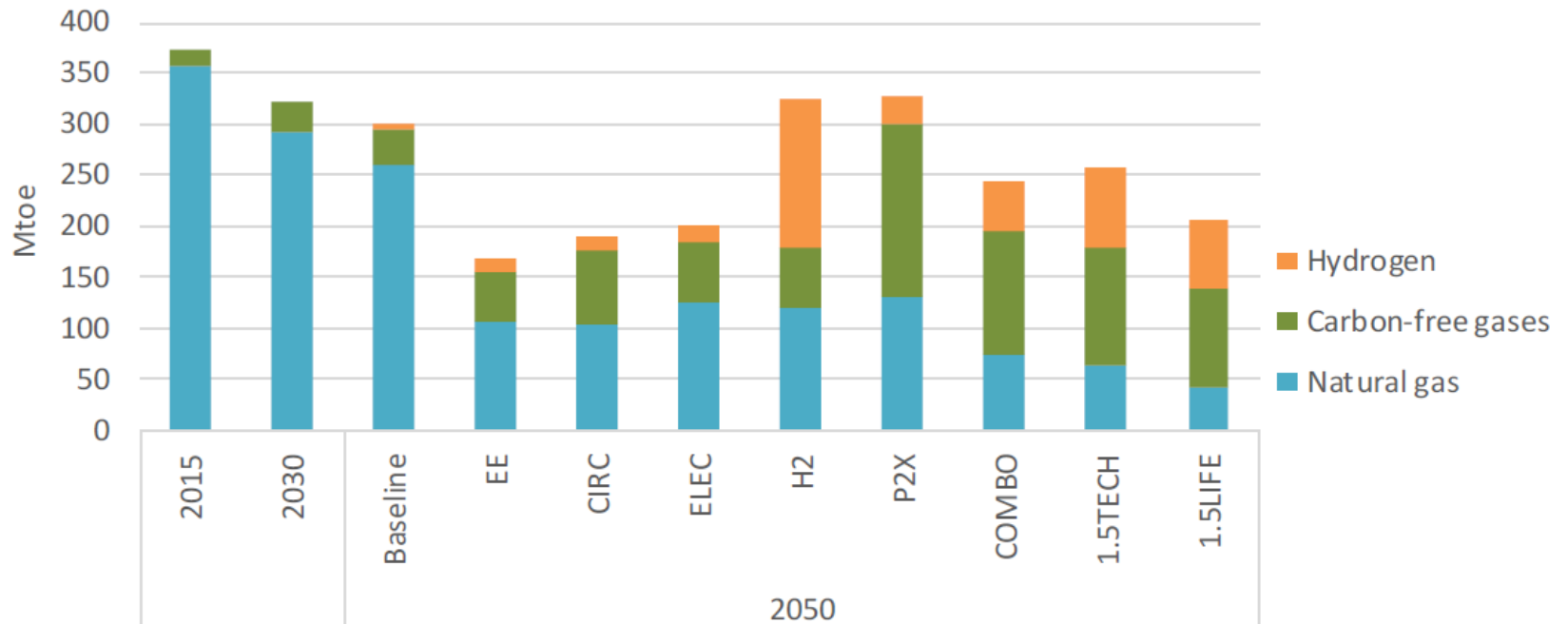
LTS scenarios
(from -80% to -100%
GHG emissions)

Sources:

- Eurostat (2000-2017): <https://ec.europa.eu/energy/en/data/energy-statistical-pocketbook>
- Reference 2016, EUCO30: <https://ec.europa.eu/energy/en/data-analysis/energy-modelling>
- LTS: https://ec.europa.eu/clima/policies/strategies/2050_en

Gaseous fuels to keep a role in the energy system

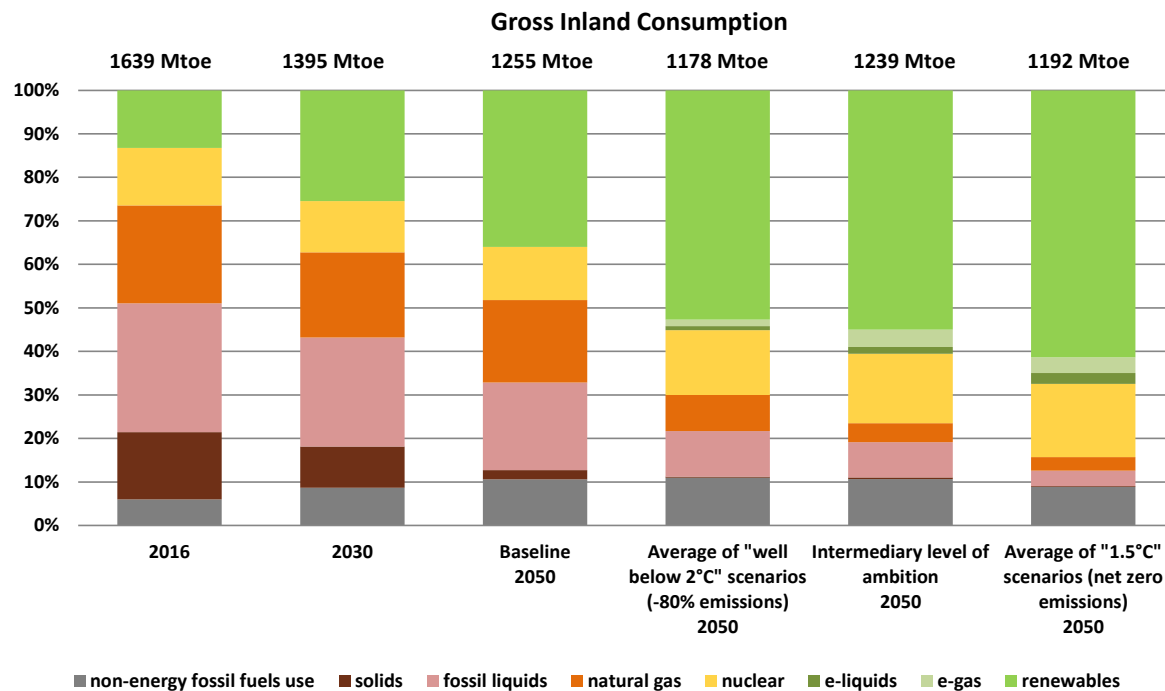
Total gaseous fuels consumption



Source: https://ec.europa.eu/clima/policies/strategies/2050_en

Evolution of gross inland consumption in the LTS scenarios

Primary energy in 2050 largely coming from renewable sources



Source: https://ec.europa.eu/clima/policies/strategies/2050_en



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Thank you for your attention!