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Renewables in Europe: 2020, 2030, 2050 – targets and policies

Rainer Hinrichs-Rahlwes, EREF-President

Hannover Messe – April 08, 2014
Renewable Energy Forum – Forum Erneuerbare Energien



About EREF

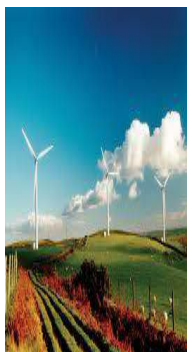
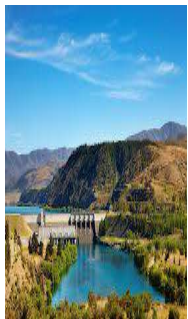
- Federation of associations from EU Member States, working in the sector of energy produced from renewable sources
- Voice of Independent Producers of Energy from Renewables
- Promoting non-discriminatory access to the energy market

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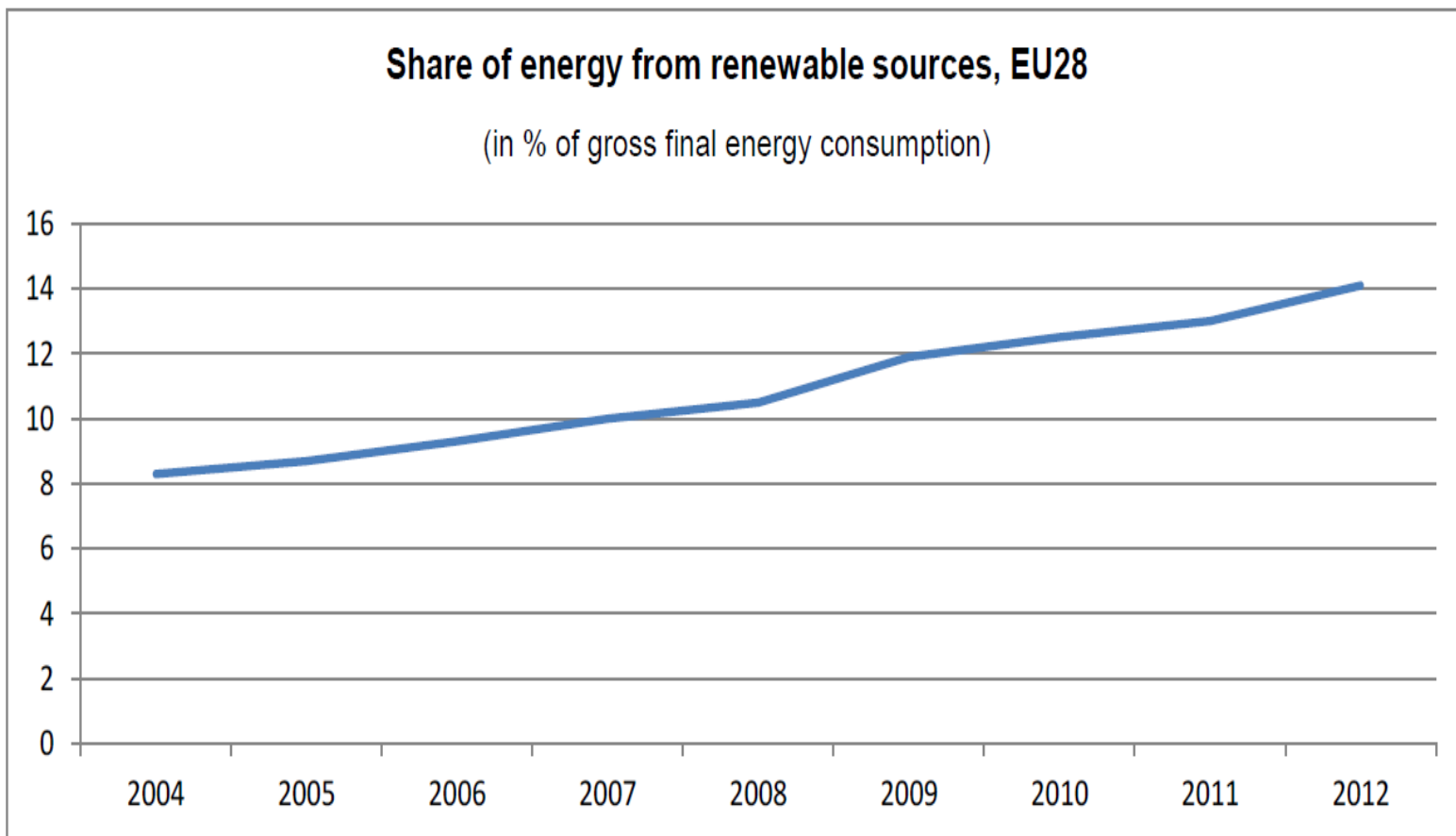
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Moving towards 2020



EU on track to 20% Renewables?



Source: Eurostat

Progress towards 2020 RES-targets per Member States

Share of energy from renewable sources
(in % of gross final energy consumption)

	2004	2007	2010	2011	2012	2020 target ⁵
EU28	8.3	10.0	12.5	13.0	14.1	20
Belgium	1.9	3.0	5.0	5.2	6.8	13
Bulgaria	9.6	9.4	14.4	14.6	16.3	16
Czech Republic	5.9	7.4	9.3	9.3	11.2	13
Denmark	14.5	17.9	22.6	24.0	26.0	30
Germany	5.8	9.0	10.7	11.6	12.4	18
Estonia	18.4	17.2	24.7	25.0	25.2	25
Ireland	2.4	3.6	5.6	6.6	7.2	16
Greece*	7.2	8.5	9.7	11.8	15.1	18
Spain	8.3	9.7	13.8	13.2	14.3	20
France	9.3	10.2	12.7	11.3	13.4	23
Croatia	13.2	12.1	14.3	15.4	16.8	20
Italy	5.7	6.5	10.6	12.3	13.5	17
Cyprus	3.1	4.0	6.0	6.0	6.8	13
Latvia*	32.8	29.6	32.5	33.5	35.8	40
Lithuania	17.2	16.7	19.8	20.2	21.7	23
Luxembourg	0.9	2.7	2.9	2.9	3.1	11
Hungary*	4.4	5.9	8.6	9.1	9.6	13
Malta*	0.3	0.4	0.4	0.7	1.4	10
Netherlands	1.9	3.1	3.7	4.3	4.5	14
Austria	22.7	27.5	30.8	30.8	32.1	34
Poland	7.0	7.0	9.3	10.4	11.0	15
Portugal	19.2	21.9	24.2	24.5	24.6	31
Romania	16.8	18.3	23.2	21.2	22.9	24
Slovenia	16.1	15.6	19.2	19.4	20.2	25
Slovakia	5.3	7.3	9.0	10.3	10.4	14
Finland	29.2	29.8	32.4	32.7	34.3	38
Sweden	38.7	44.1	47.2	48.8	51.0	49
United Kingdom	1.2	1.8	3.3	3.8	4.2	15
Norway	58.1	60.2	61.2	64.6	64.5	67.5

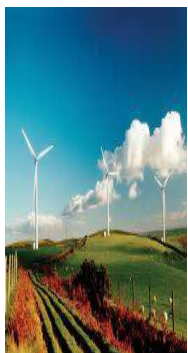
* Eurostat estimates based on the national data transmission under Regulation (EC) No 1099/2008 on energy statistics.

Below indicative trajectory 2011/2012

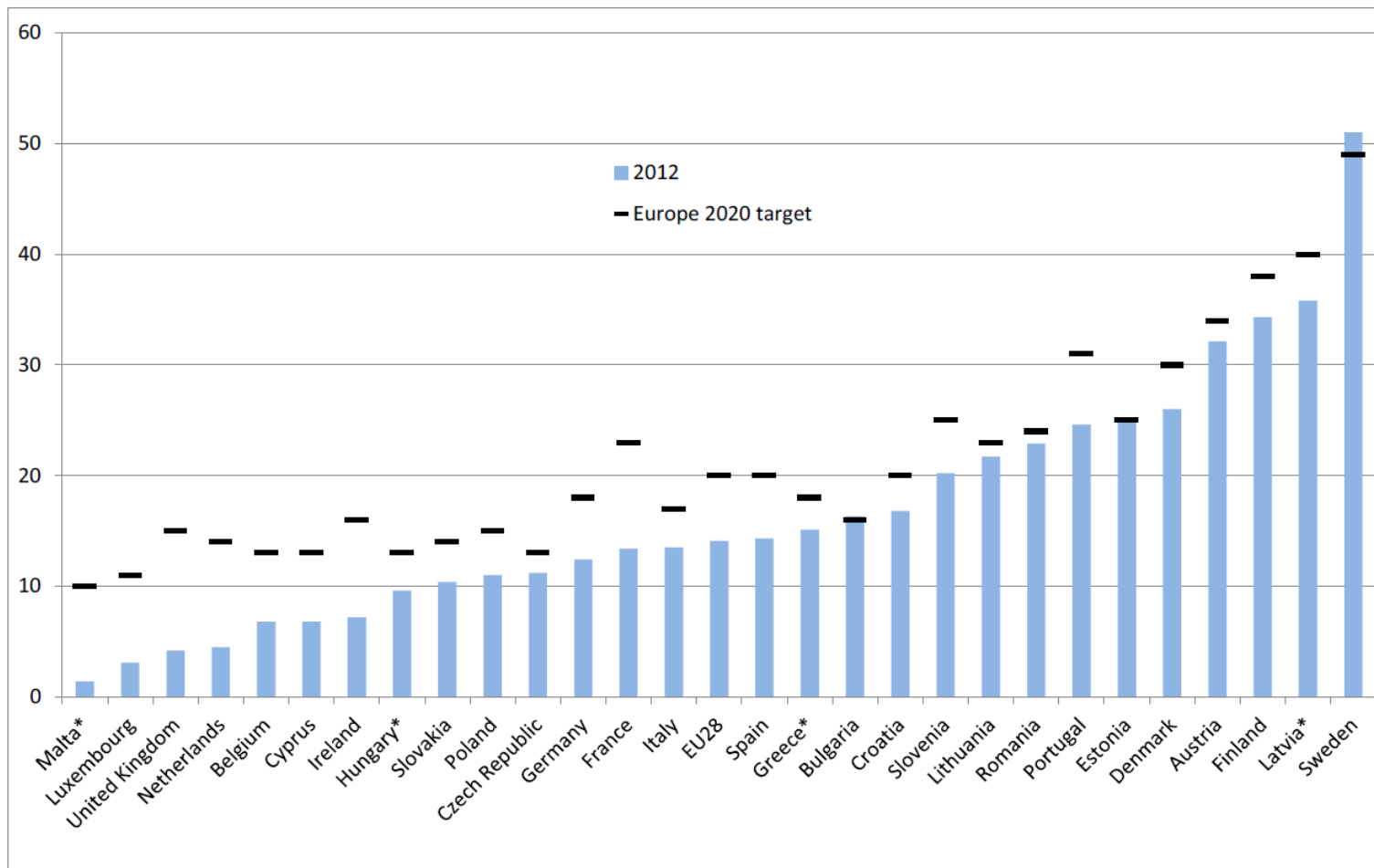
2020-target already reached

Source: Eurostat

RES in 2012 and 2020-targets



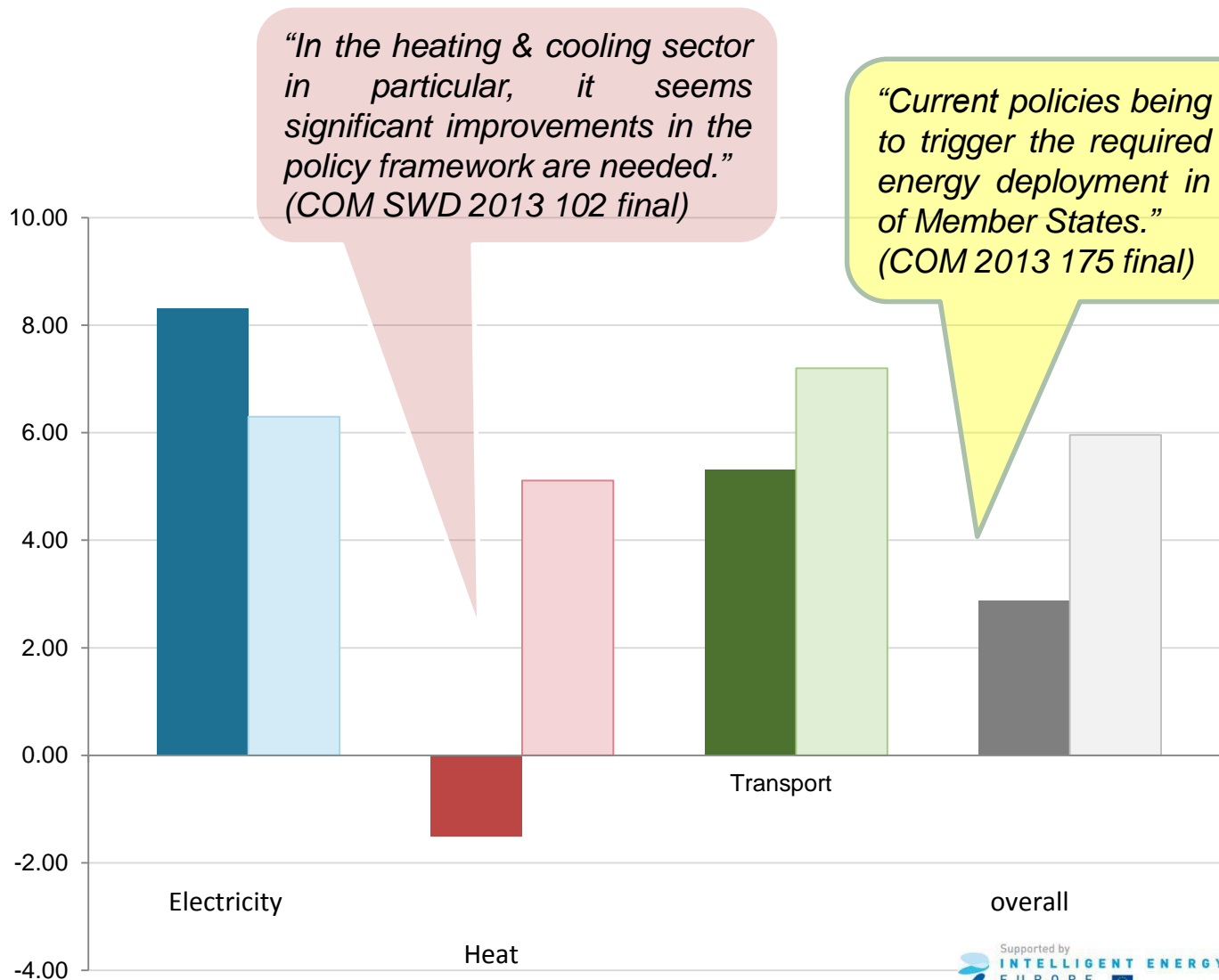
Share of energy from renewable sources per Member State
(in % of gross final energy consumption)



* estimated

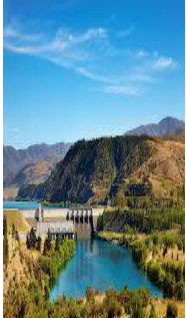
Source: Eurostat

2010-2011 Growth Rates vs. AAGR required to meet 2020 ambitions



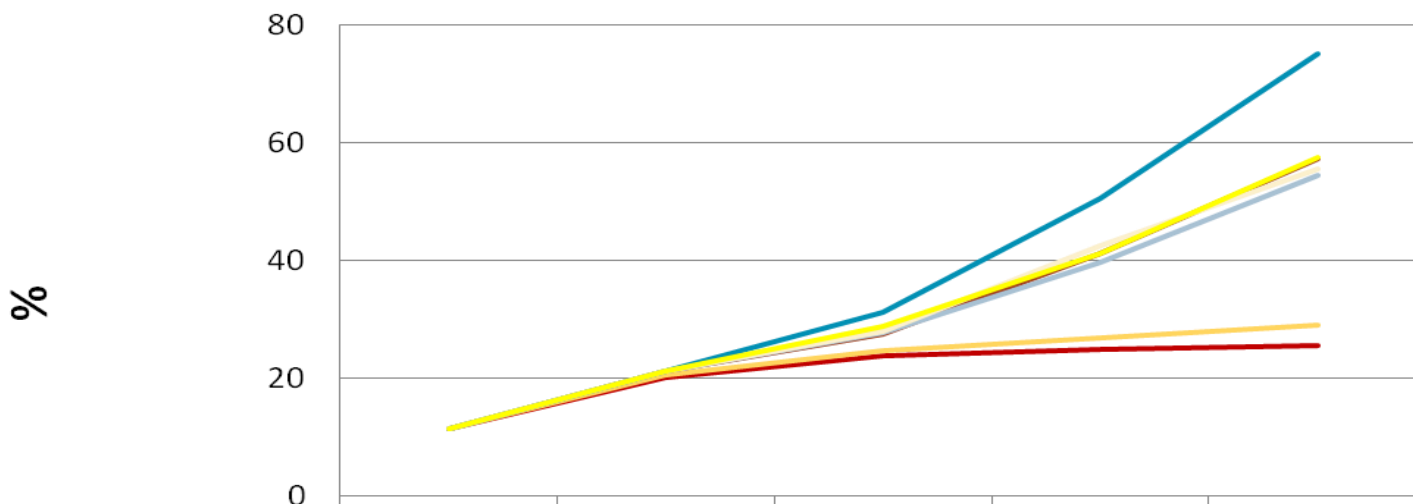
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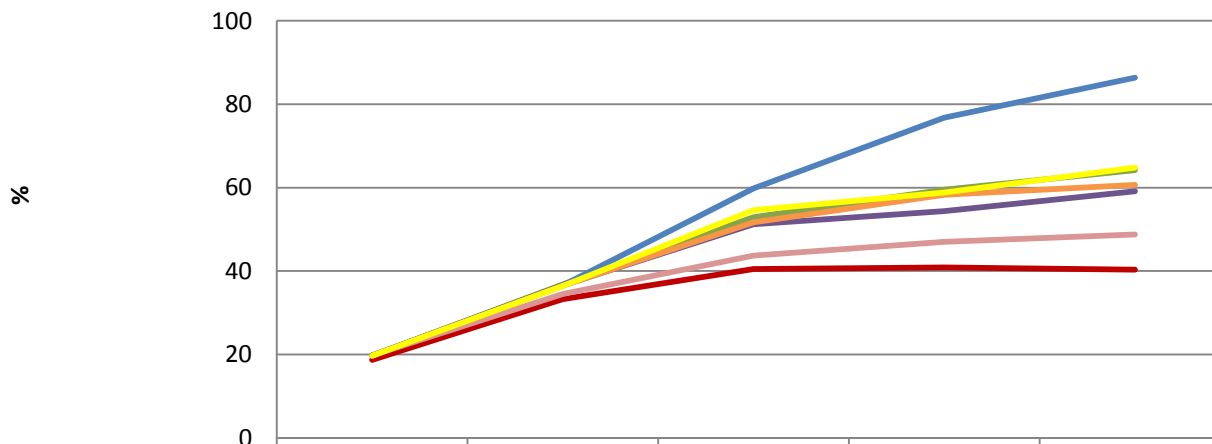
The future: Energy Roadmap 2050

High RES in EC-“Energy Roadmap 2050”

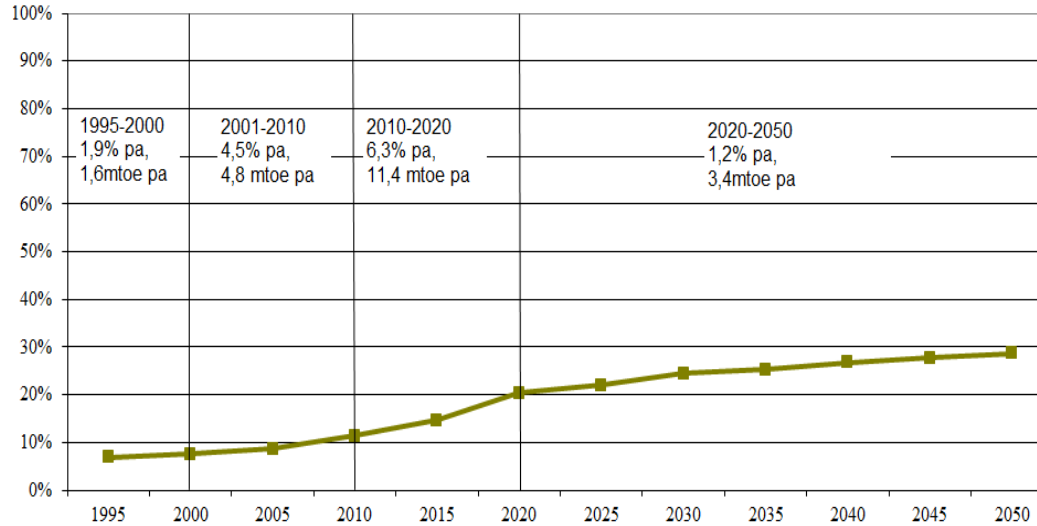


	2010	2020	2030	2040	2050
Reference	11,4	20,1	23,9	25	25,5
CPI	11,4	20,6	24,7	27	29
Energy Efficiency	11,4	21,3	27,6	41,3	57,3
Diversified supply technologies	11,4	21,3	27,7	39,8	54,6
High RES	11,4	21,3	31,2	50,6	75,2
Delayed CCS	11,4	21,3	28	42,6	55,7
Low Nuclear	11,4	21,2	28,8	41,3	57,5

Share of RES-E



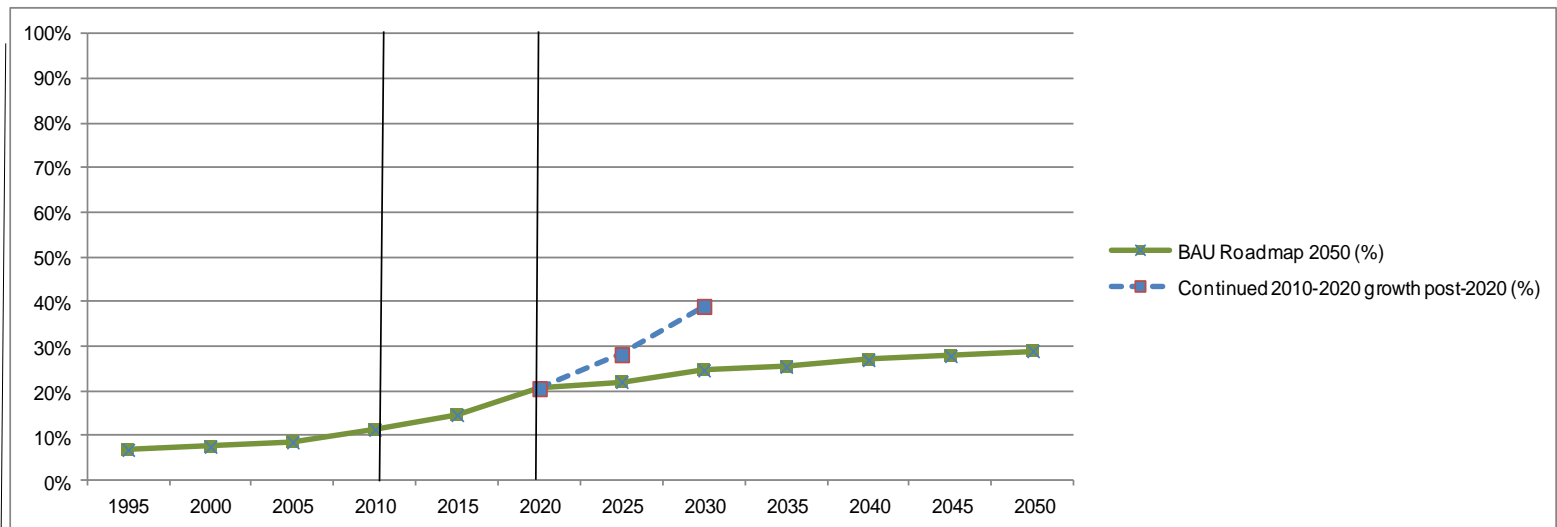
	2010	2020	2030	2040	2050
Reference	18.7	33.3	40.5	40.9	40.3
CPI	19.8	34.5	43.7	47	48.8
Energy Efficiency	19.7	36.8	52.9	59.5	64.2
Diversified supply technologies	19.7	36.6	51.2	54.4	59.1
High RES	19.8	36.6	59.8	76.8	86.4
Delayed CCS	19.7	36.5	51.7	58.3	60.7
Low Nuclear	19.7	36.4	54.6	58.8	64.8



Energy Roadmap 2050 (COM)

BAU = 25% RE in 2030

Continued growth after 2020 = 40% RE in 2030



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The 2030 challenge

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✓ Growing sector and growing industry
but crisis has an impact

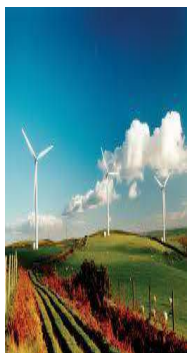


✓ Benefits for economy and environment
but debates on cost and prices



✓ RED: Stable framework for solid growth
but policy changes, partly retrospective

✓ Milestone 2030: the missing link
but extremely unambitious CEF 2030



Europe is falling back

- **Global uptake of policies for renewables** and considerable **growth outside Europe**: decreasing European share in growing global market
- **Lack of policy certainty in Europe** (policy changes in MS and ongoing uncertainty about post-2020)
- **Stable and reliable integrated climate and energy framework for 2030 needed** – including ambitious and binding targets for GHG-emissions reduction, energy efficiency and renewable energy.



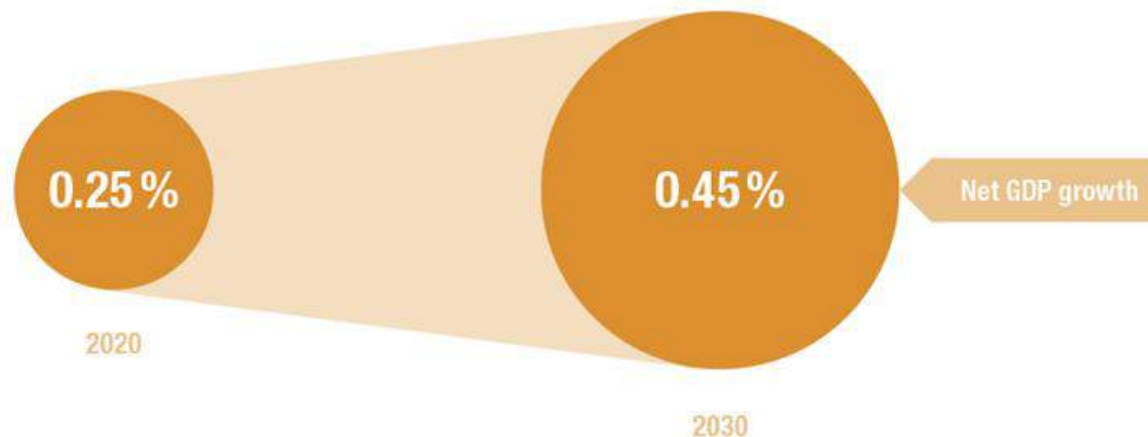
Growing the economy

Renewable
Energy Industry

1%
of the EU GDP

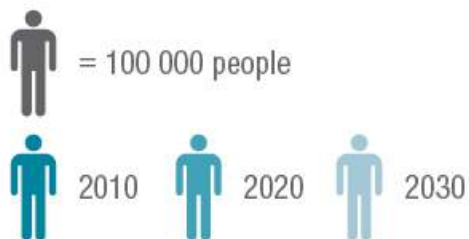


Economic activity valued €137 billion





Creating Jobs



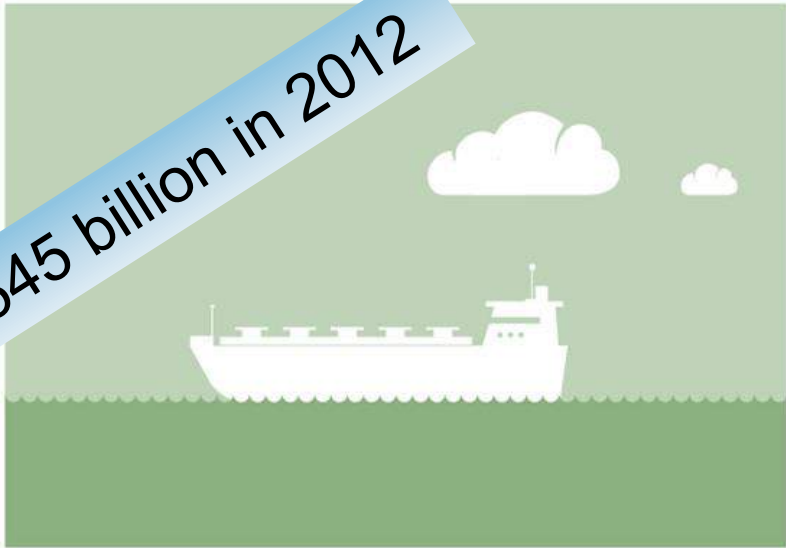
Replacing fossil fuel imports

➔ RES technology export instead of fossil fuel imports

€388 billion
Import of Fossil fuel
in the EU

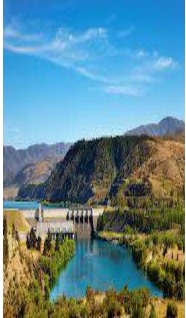
€150 billion
EU trade deficit

€ 545 billion in 2012



- ✓ 550 Mtoe by 2030 (€350 billion)
- ✓ equivalent to consumption of Belgium, Germany, Latvia, Poland, the UK and Spain

The Commission's Proposal: CEF 2030



- GHG-reduction-target 2030: 40% (“domestic”)
- “binding” EU-RES-target: 27% - no national targets
- “ambitious policies” for energy efficiency – no target

Negative impact:

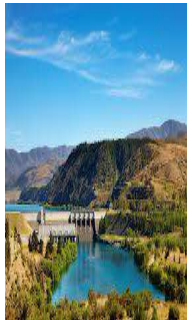
- **less jobs** compared to RES 30/35%-targets &
- **less savings** from fossil fuel imports

Source: European Commission - Impact Assessment



CEF 2030: averting investment

- Labelling: BAU = ambitious: 45% - 40% - 35% - 30% - **27%**
 - * 21% “expected” in 2020 (but: national policy changes – incl. retroactive)
 - * plus 6% in 10 years: no incentives for enabling policies
- Maintaining investors’ uncertainty in RE and EE
 - * no clear direction provided by GHG-target and RES EU-target only
- Shifting towards “other low carbon” technologies
 - * “flexibility for member states” leads to increasing costs (for nuclear and CCS) instead of decreasing costs (renewables and efficiency)
 - * weakening most promising and mature GHG-reduction technologies
- Undermining successful policies at MS-level
 - * parallel process: Environment and Energy State Aid Guidelines (EEAG)
 - * binding national targets needed for policy certainty and subsidiarity principle



Steering in the **wrong direction** **CEF 2030**

→ less growth

→ fewer jobs

→ more import spending

European Council - March 21, 2014:

Homework for EC until European Council in June

* Assessing impact of different scenarios and options

* Energy security plan



Curing the deficits → new **commitment** and **strong policies** needed

- **Completing Internal Energy Market** including fair access for independent and new market players
- Enhancing energy **infrastructure** (TSO & DSO)
- **Convergence** of national **RES-support policies**
- Effective **carbon pricing**: ETS-relaunch (and tax)
- **Phasing-out** conventional and nuclear **subsidies**
- Developing **flexibility-driven** energy **market design**
- An **integrated CEF 2030** with mutually reinforcing binding and **ambitious targets** for GHG-reduction, Energy Efficiency and Renewable Energy
 - EU-targets and **binding national targets**

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Thank you for your attention!

Rainer Hinrichs-Rahlwes
- EREF-President-

