EU gas market + policy developments

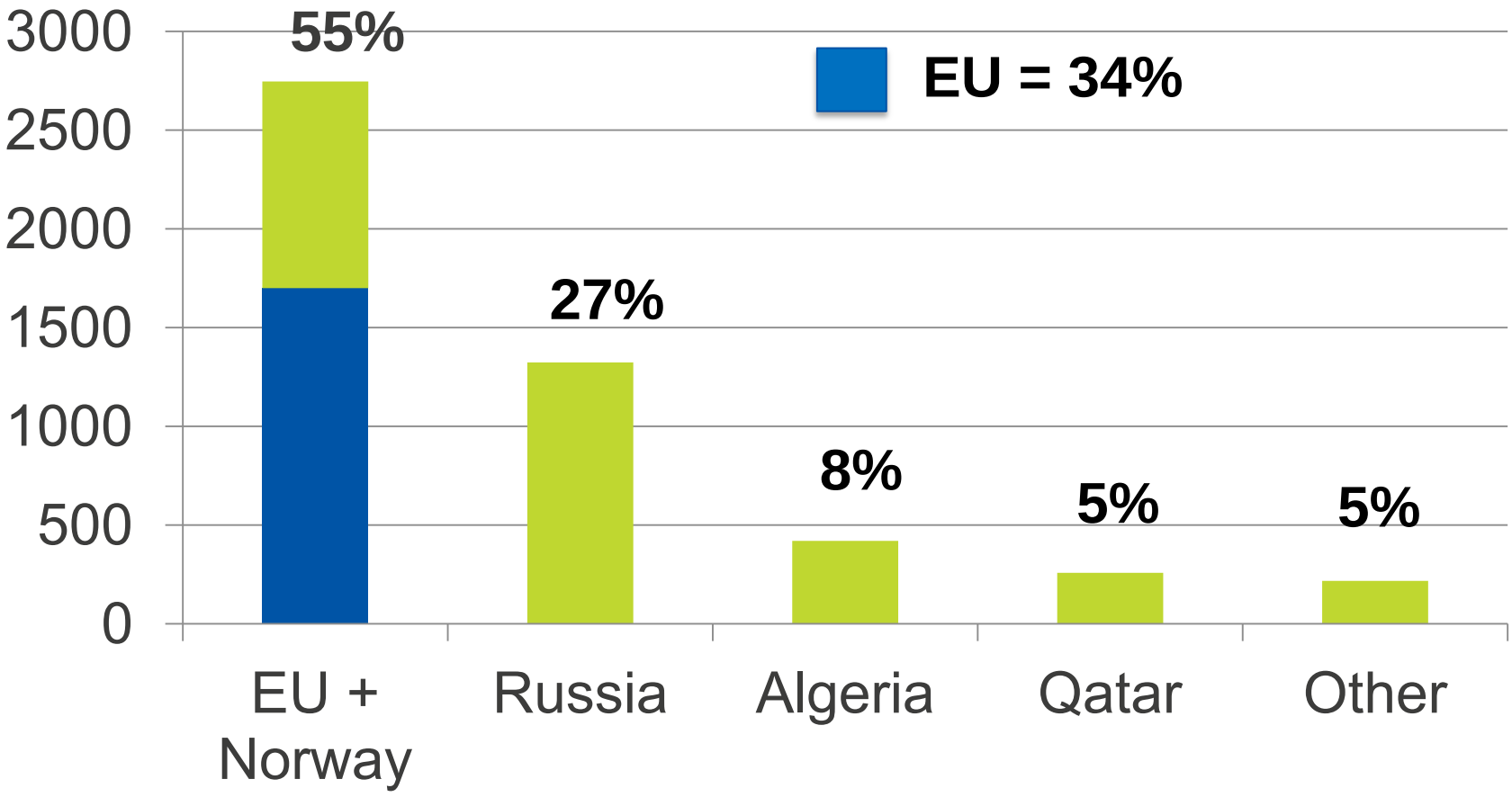
IENE 20th National Conference “Energy and Development 2015”
11/12 November 2015

Beate Raabe
Secretary General

Who is Eurogas?
30 companies
14 associations
Wholesale
Retail
Distribution
European associations
GERG
marcogaz
Gasum
HMN
DONG energy
ena
Energy UK
GasTerra
RWE
Verbundnetz Gas AG
e·on
bdew
PGNiG
TOTAL
afg
ENGIE
axpo
FGW
OMV
EDISON
Enel
eni
SPP
BVLGARGAZ
GAZBIR
ΔΕΠΑ
gasNatural fenosa
sedigas

Security of supply

EU gas supplies + sources in 2013

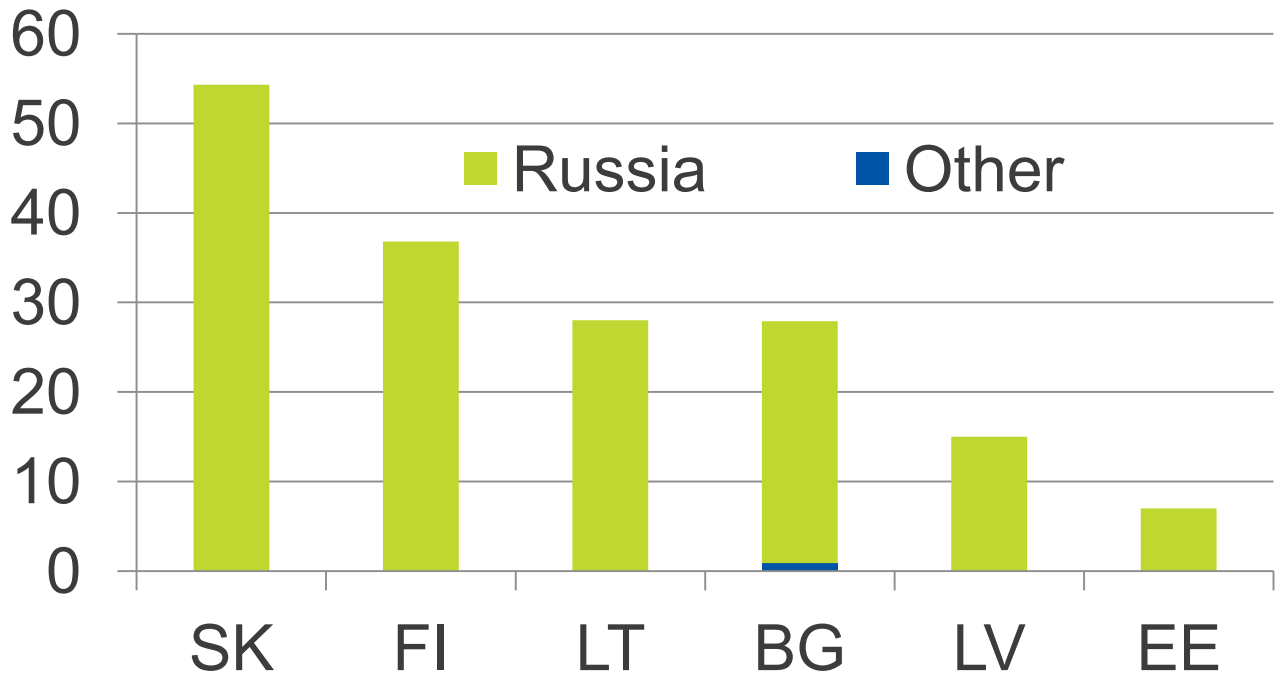


Data: Eurogas Statistical Report 2014

Markets based solely on imports from Russia

Total net supplies:
168 TWh = 3% of ⟶

Total net supplies EU-28 in 2013:
4996 TWh

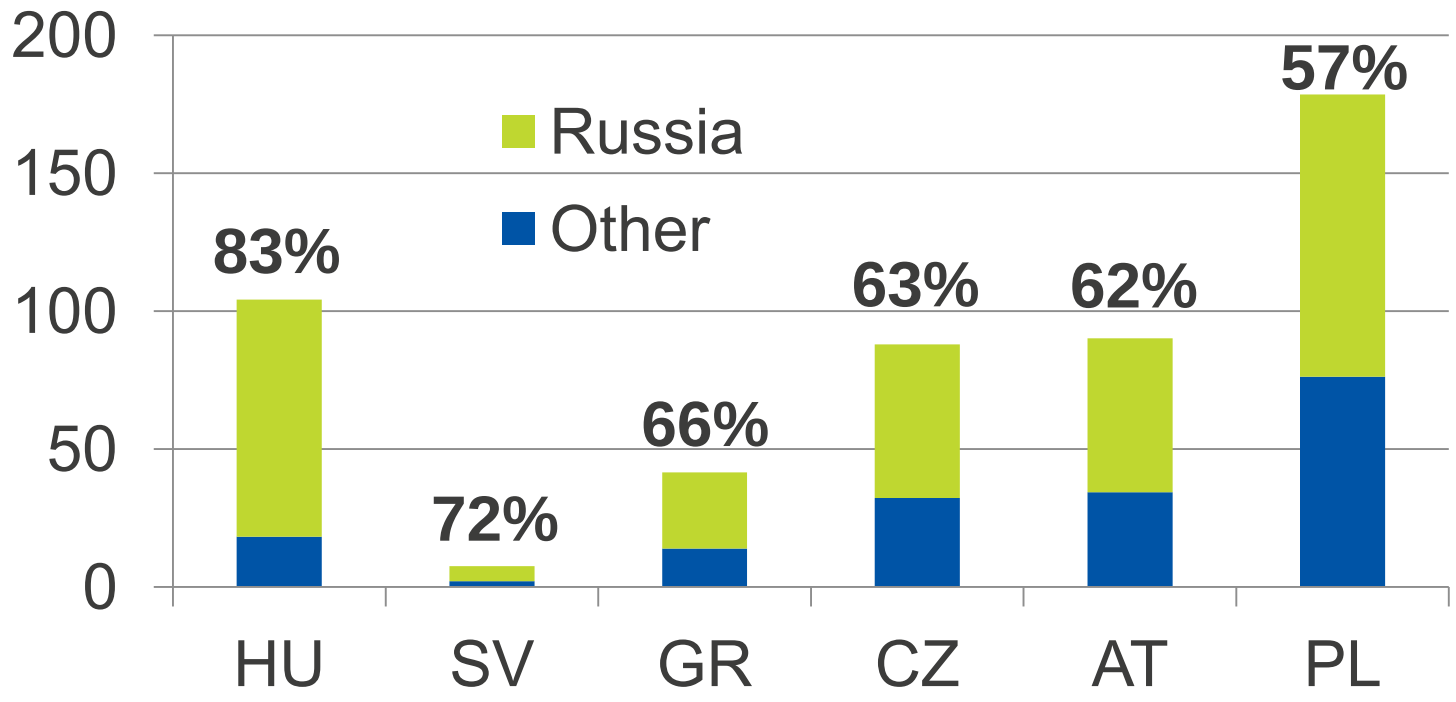


Data: Eurogas Statistical Report 2014

Markets based largely on imports from Russia

Total net supplies:
510 TWh = 10% of ⟶

Total net supplies EU-28 in 2013:
4996 TWh



Data: Eurogas Statistical Report 2014

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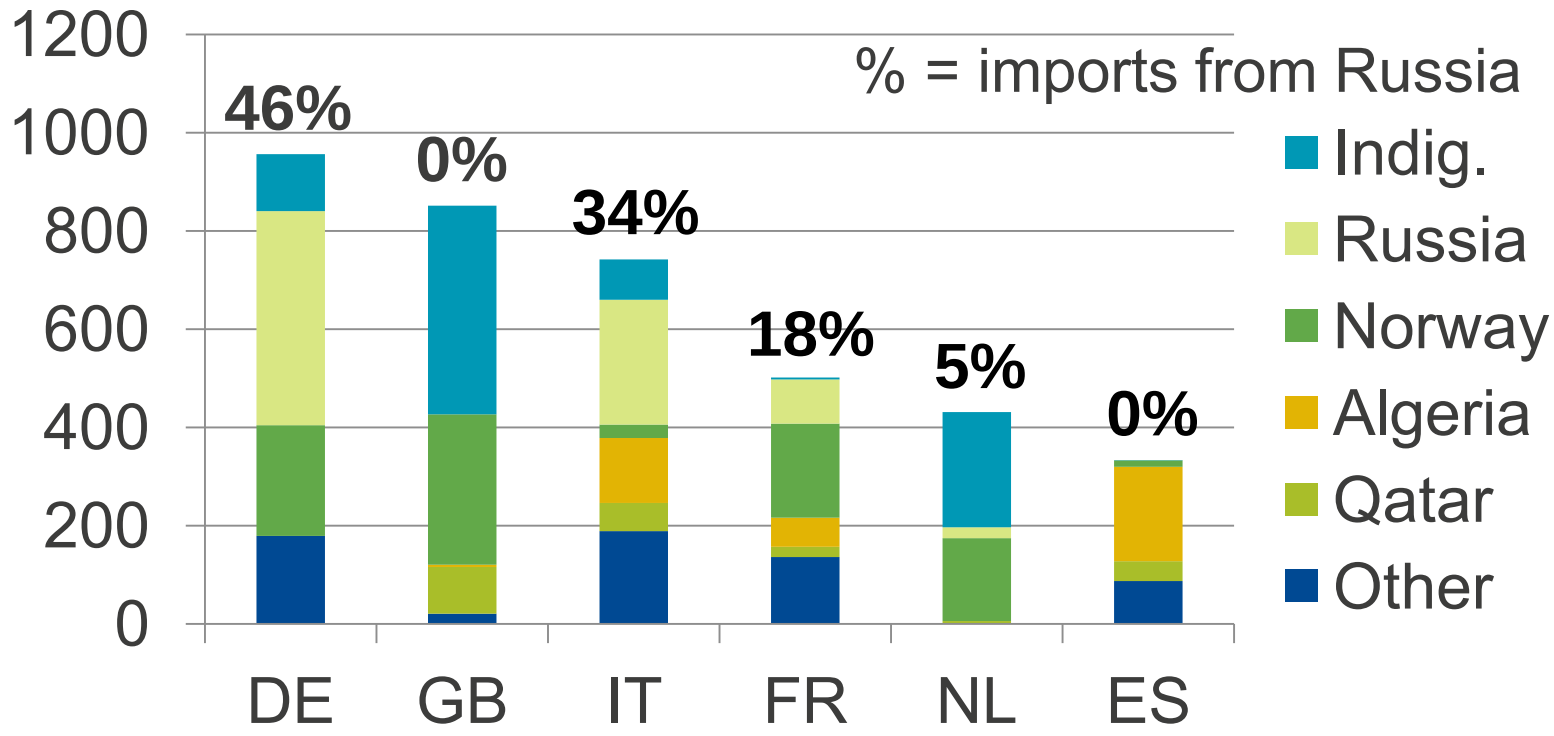
Markets based on varied sources of supply

Total net supplies:
3815 TWh = 76% of → **Total net supplies EU-28 in 2013:**
4996 TWh



Data: Eurogas Statistical Report 2014

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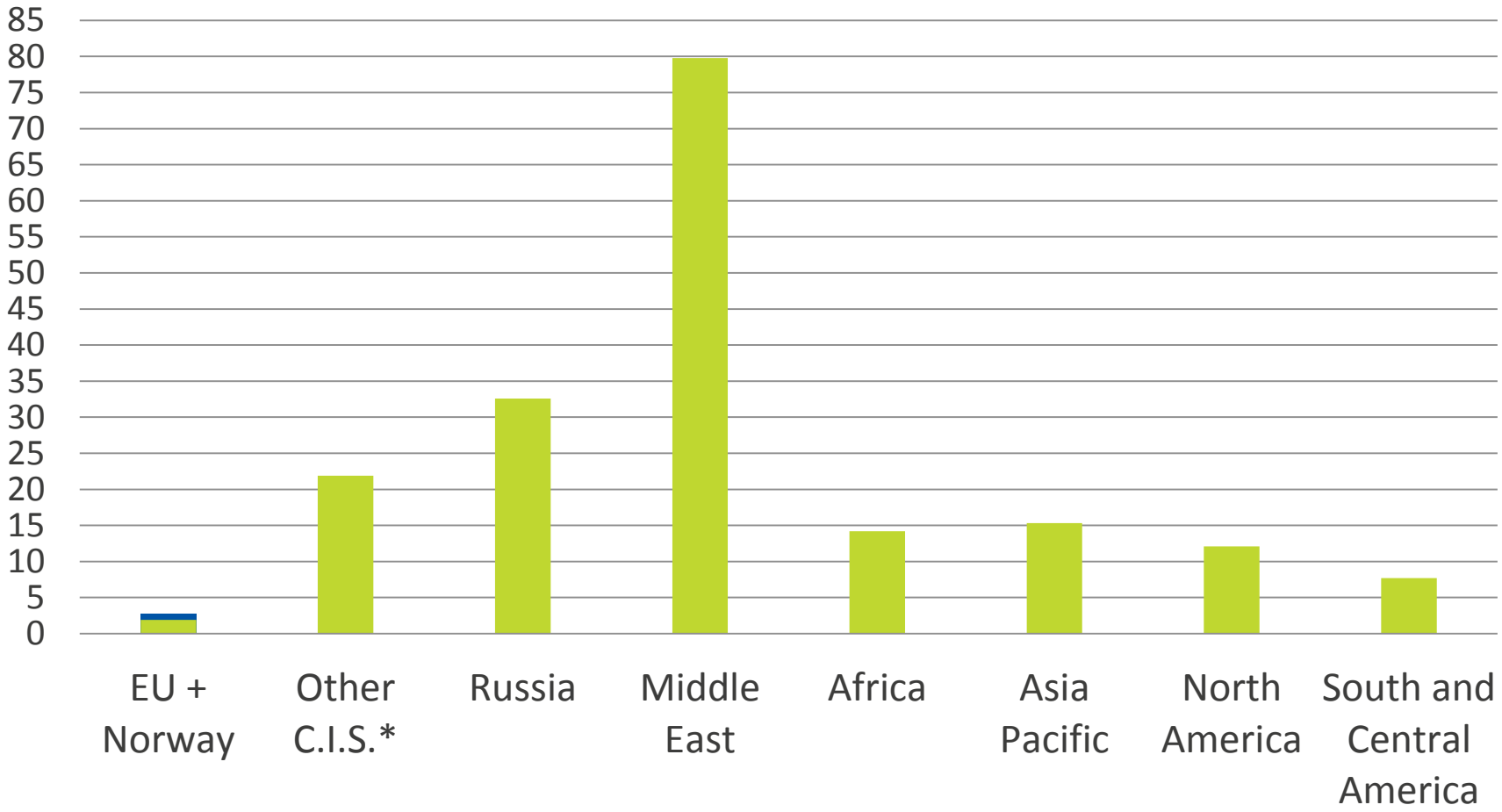
Global gas reserves by regions, 2014

In trillion cubic meters (tcm)



** Commonwealth of Independent States*

Source: BP *Statistical Review 2015*

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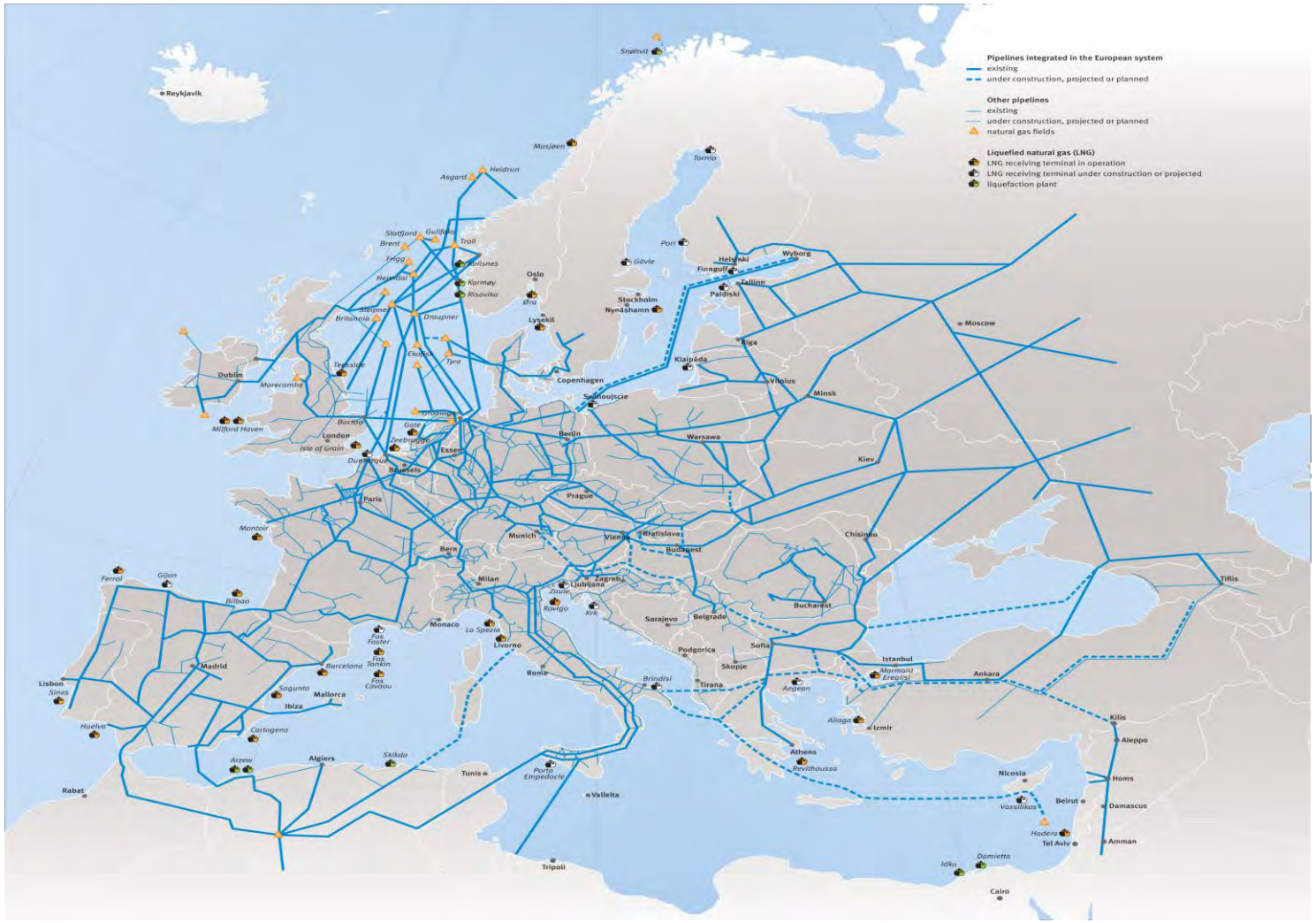
Which way will it come?



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New pipelines - TAP

Planned beginning of construction: 2016
Planned beginning of operation: 2020
Volume: 10 bcm, extendible to 20 bcm

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New pipelines – Turkish Stream

63 bcm
if 4 pipes

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New pipelines – Galsi

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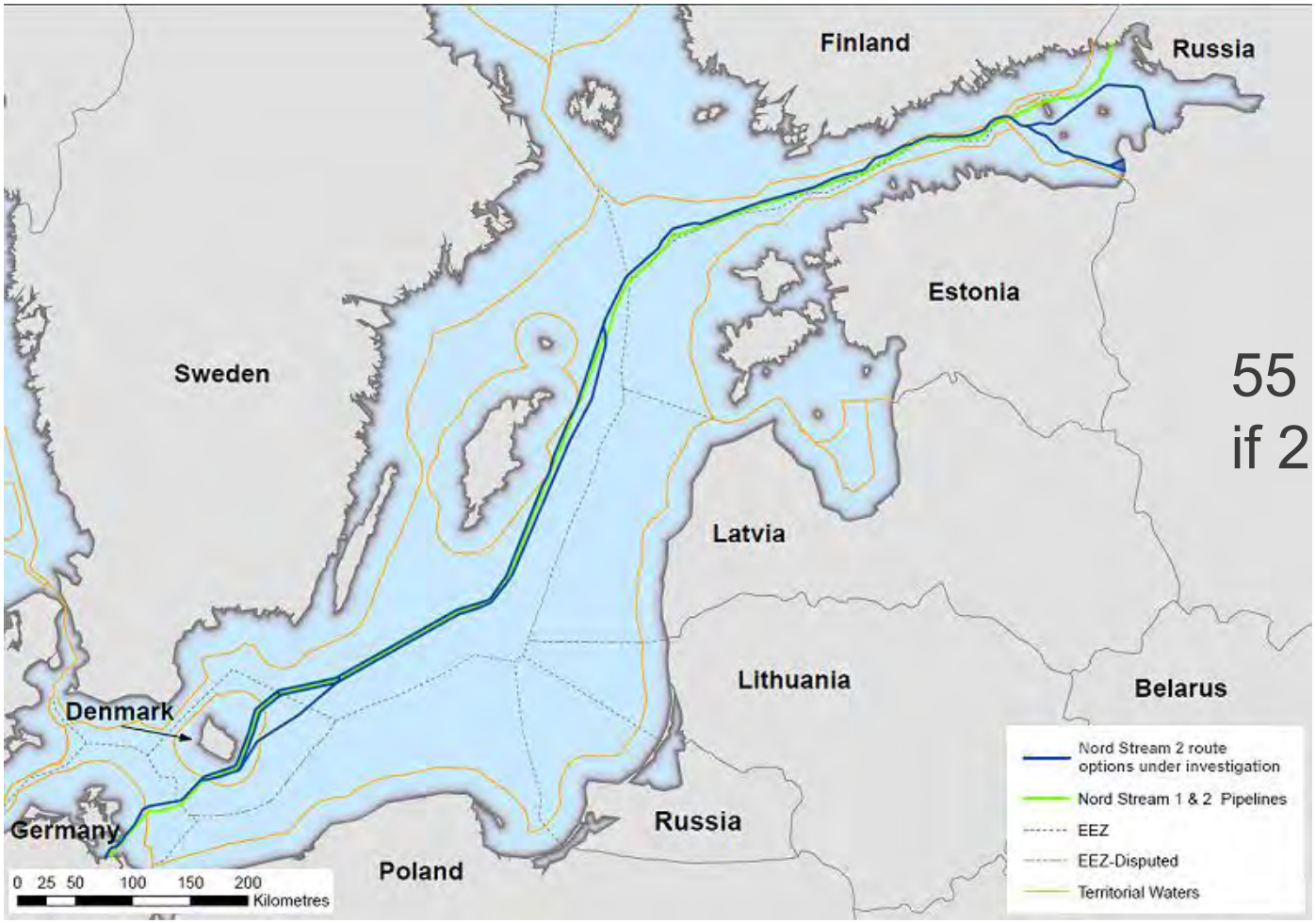
New pipelines – Nord Stream 2



55 bcm
if 2 pipes

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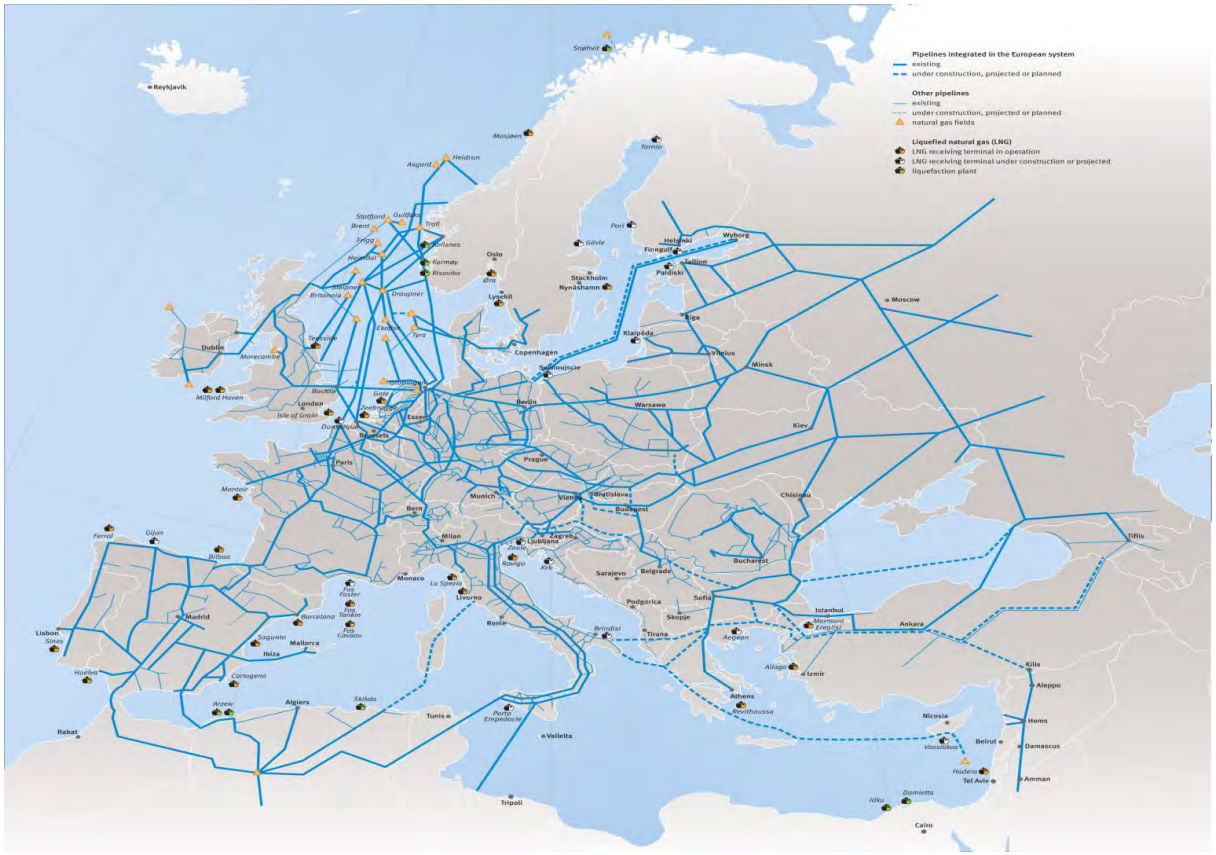
The potential of LNG … is large



Relevant legislative + policy proposals in 2016

- Revision of the **Security of Gas Supply Regulation**
- Revision of the Decision regarding **intergovernmental agreements** between Member States and third countries
- **LNG and energy storage strategy**
- Further implementation of the **internal energy market**
- Strengthening of the **role of ACER**

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Gas & renewables

Strong partners in future energy supply

Relevant legislative + policy proposals in 2016

- Revision of the **Security of Electricity Supply Directive**
- Legislative proposal on **electricity market design**
- Revision of the **Renewables Directive**
- Proposals regarding **sustainability criteria for biomass**
- Strategy for **heating and cooling**
- Revision of the **Energy Efficiency Directive**
- Proposals for the **decarbonisation of transport**

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Gas-fired power station (Combined Cycle Gas Turbine)

Whitegate Power Plant

Cork, Ireland

Capacity: 445MW

Efficiency: 58.5%

Photo: Bord Gáis Energy

Concentrated solar power (solar tower system) + gas

Sanlúcar la Mayor,
Southern Spain,
Near Seville

10 MW
20-25GWh per year
Up to 15% from gas

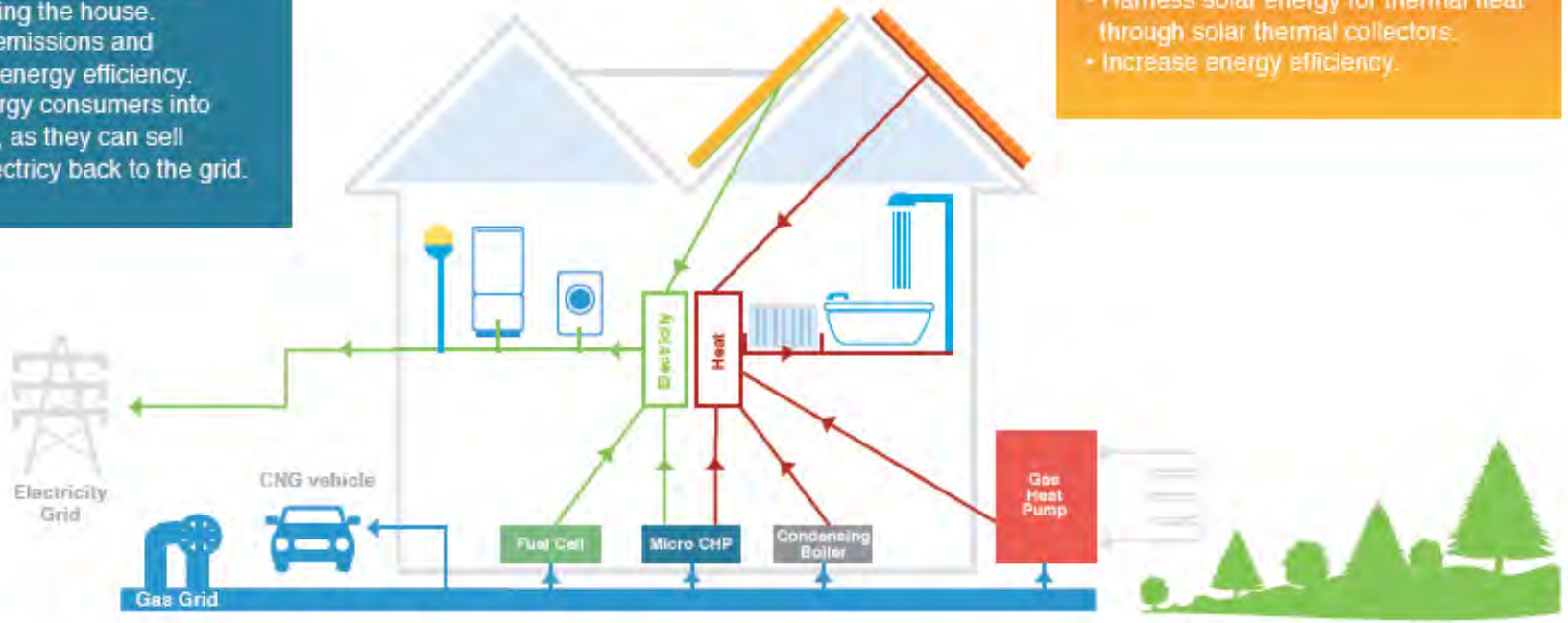
Photos: Wikipedia

Micro-CHP Unit

- Micro combined heat and power (Micro-CHP) generates power while heating the house.
- Reduces emissions and increases energy efficiency.
- Turns energy consumers into producers, as they can sell excess electricy back to the grid.

Solar Energy Systems

- Use solar energy to generate power through photovoltaics.
- Harness solar energy for thermal heat through solar thermal collectors.
- Increase energy efficiency.



Fuel Cells (technology in development)

- Convert natural gas into ultra-clean hydrogen.
- Stationary fuel cells are used for commercial, industrial and residential primary and backup power generation.
- Are clean (no emissions) and dependable (can operate for 1000s of hours) power generation. [10]

Gas Heat Pumps

- Use conventional refrigeration technology to extract the sun's energy stored in the environment and raise it to a temperature suitable for heating purposes.
- Are more efficient than an electric heat pump.

Picture: GasNaturally

Gas can be renewable, too

Foto: E.ON

Foto: Energigas Sverige

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Gas in transport

A new market

CNG + LNG – Clean and flexible

Gas / electricity hybrid in Spain

Fotos:
NGVA Europe, Viking Line, NGVAmerica

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GAS WINNERS in AUTO TEST – ÖKO-TREND Germany 2015

Category: Ultra small

Photo: Volkswagen

Category: Compact vans

Photo: Mercedes-Benz

Category: Vans

Photo:Opel

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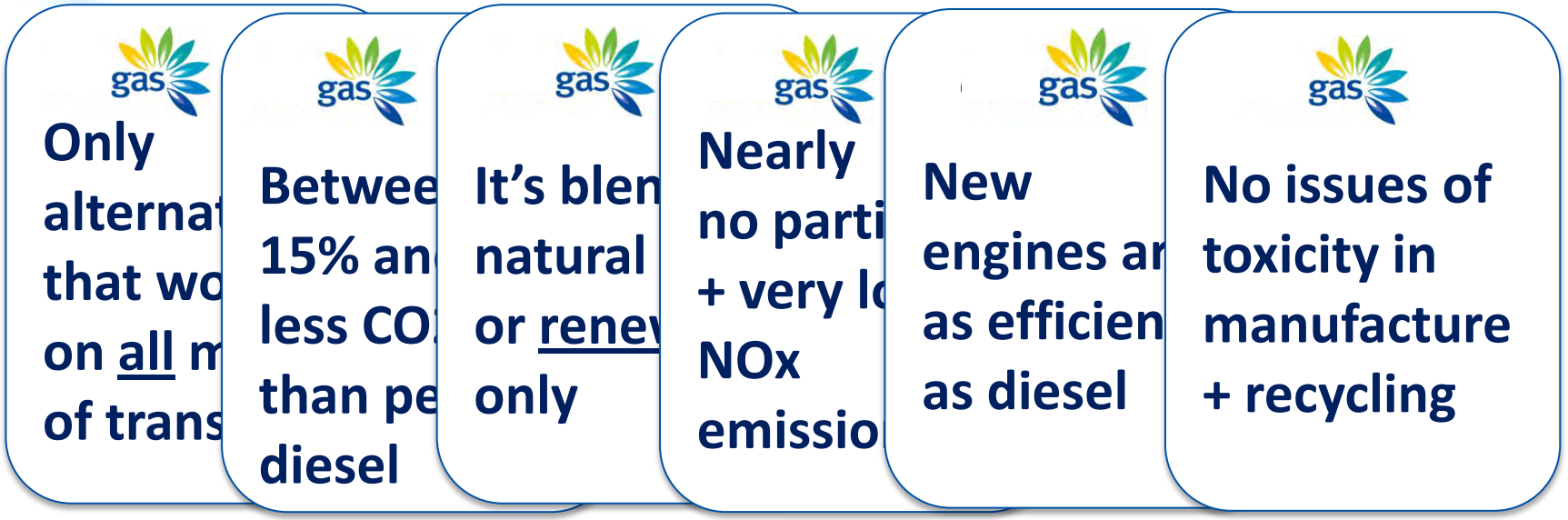
The 12 trump cards of gas in transport



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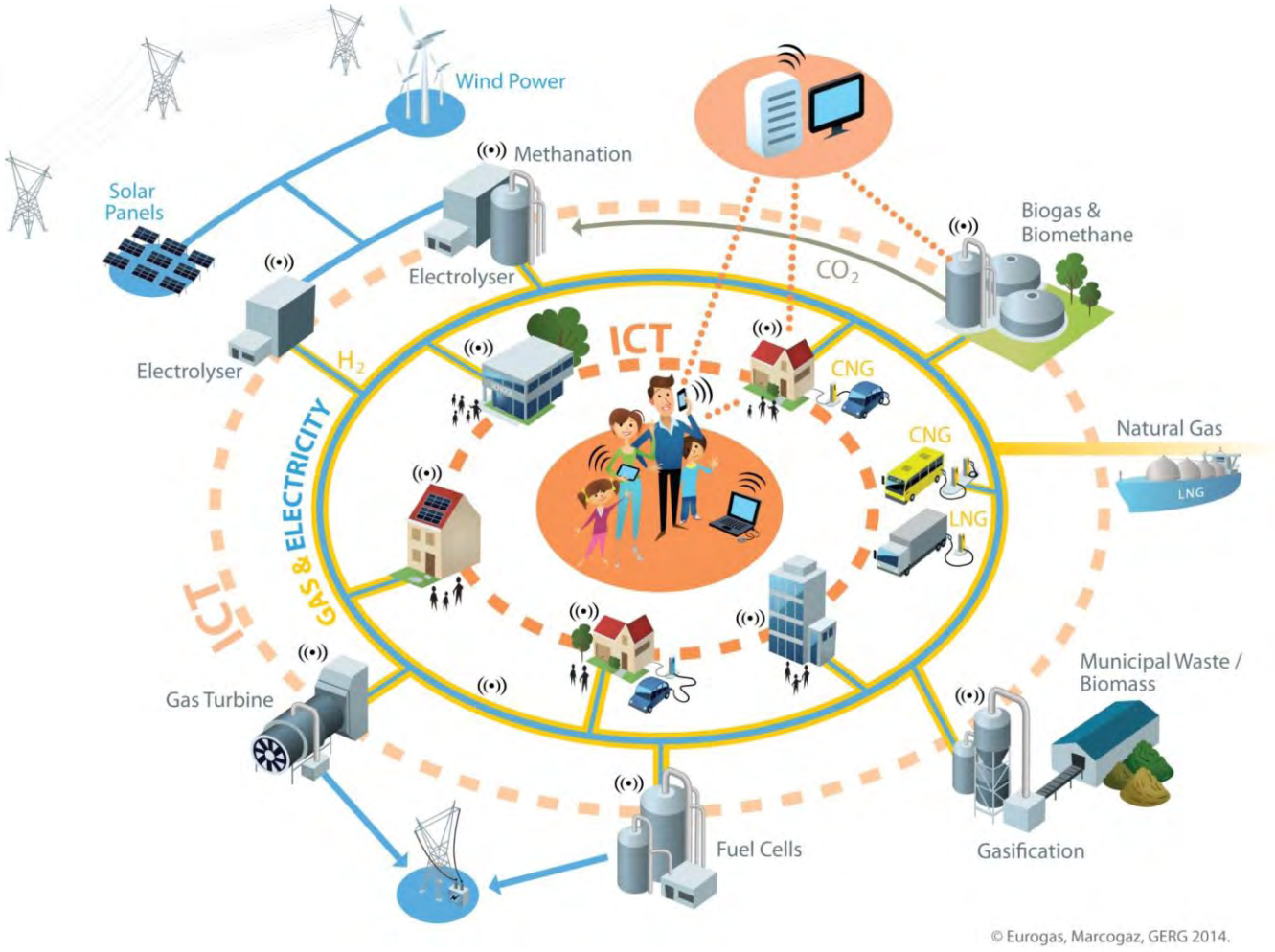
The 12 trump cards of gas in transport

Smart gas : smart future



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Thank you for your attention!

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