



EUROPEAN RENEWABLE  
ENERGY COUNCIL



# Renewables until and beyond 2020

*- Policy perspective on 2030 -*



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Tallinn, 18<sup>th</sup> October 2012



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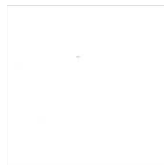
# THE UNITED VOICE OF THE EUROPEAN RENEWABLE ENERGY SECTOR

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**AEBIOM**  
EUROPEAN BIOMASS ASSOCIATION



**EREF**  
European Renewable Energies Federat





# 2020 targets in Renewable Energy



Member States' Progress Towards 2020 Targets in Renewable Energy

MS	RES In Consumption in 2010 <sup>(1)</sup>	2011/2012 RES Interim Target <sup>(1)</sup>	2020 RES Target <sup>(1)</sup>	RES In Transport (2010) <sup>(2)</sup>	2020 RES Target in Transport <sup>(2)</sup>
<b>EU</b>	<b>12.5%</b>	<b>10.7%</b>	<b>20%</b>	<b>4.7%</b>	<b>10%</b>
Belgium*	5.16%	4.4%	13%	4.33%	10%
Bulgaria	13.79%	10.7%	16%	1.00%	10%
Czech Republic	9.24%	7.5%	13%	4.58%	10%
Denmark	22.22%	19.6%	30%	0.27%	10%
Germany	11.00%	8.2%	18%	5.73%	10%
Estonia	24.32%	19.4%	25%	0.17%	10%
Ireland	5.46%	5.7%	16%	2.39%	10%
Greece	9.24%	9.1%	18%	1.93%	10%
Spain	13.83%	10.9%	20%	4.73%	10%
France	12.93%	12.8%	23%	6.10%	10%
Italy	10.11%	7.6%	17%	4.81%	10%
Cyprus	4.85%	4.9%	13%	1.97%	10%
Latvia	32.57%	34.0%	40%	3.32%	10%
Lithuania	19.72%	16.6%	23%	3.59%	10%
Luxembourg	2.83%	2.9%	11%	2.04%	10%
Hungary	8.68%	6.0%	13%	4.74%	10%
Malta	0.36%	2.0%	10%	0.30%	10%
Netherlands	3.76%	4.7%	14%	3.01%	10%
Austria	30.05%	25.4%	34%	5.45%	10%
Poland	9.41%	8.8%	15%	5.94%	10%
Portugal	24.57%	22.6%	31%	5.59%	10%
Romania	23.36%	19.0%	24%	3.19%	10%
Slovenia	19.80%	17.8%	25%	2.87%	10%
Slovakia	9.76%	8.2%	14%	7.85%	10%
Finland	32.17%	30.4%	38%	3.90%	10%
Sweden	47.94%	41.6%	49%	7.75%	10%
United Kingdom	3.20%	4.0%	15%	2.96%	10%

EU reached 12.5% RES in FEC already in 2010 = 1.8% above the indicative trajectory indicated in the NREAPs for 2011/2012

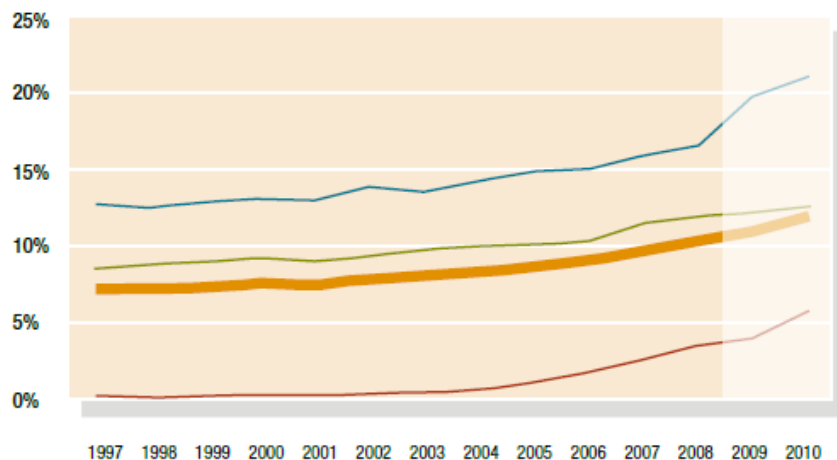


Figure 4  
Renewable Energy Share in Final Energy Consumption 1997-2010 (%)

- % RES in FEC
- % RES-E
- % RES-H&C
- % RES-T

Source: 1997-2008 Eurostat;  
2009 preliminary data; 2010 EU targets

### Decarbonising the Energy Supply (2010)

880 Mt of energy related CO<sub>2</sub> emissions avoided

➡ -22% of energy related CO<sub>2</sub> emissions

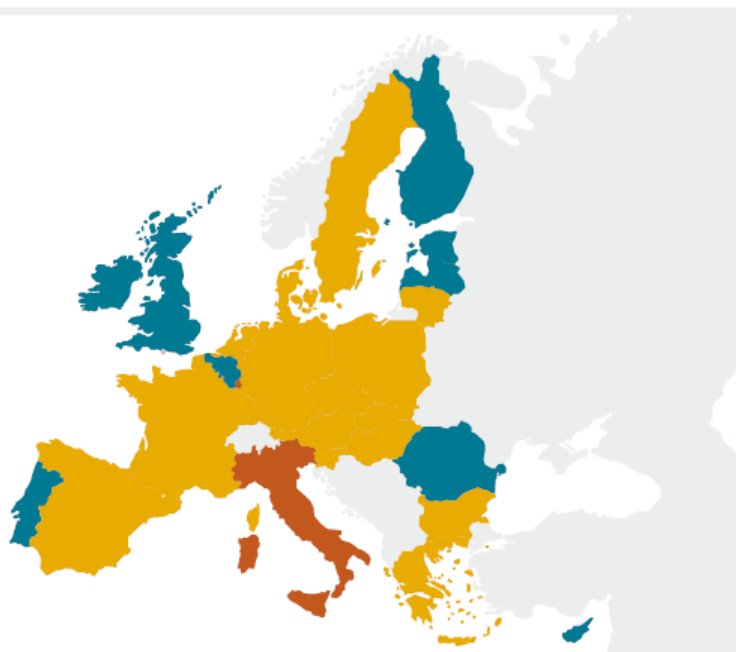
### Investing in Renewable Energy

Financial transactions/investments were €55 billion (2008) and €62 billion (2009) and €77 billion (2010)



Figure 6  
Member States' NREAPs projections  
for 2020

- Countries meeting their 2020 targets
- Overachieving countries
- Underachieving countries



**20.7% RES in 2020**

34.3% RES-E in 2020

21% RES-H in 2020

10% RES-T in 2020

Source: EREC based on NREAPs

*Decarbonising the Energy Supply (2020)*  
 1,690 Mt of energy related CO2 emissions avoided  
 ➤ -40% of energy related CO2 emissions

*Investing in Renewable Energy*  
 Investment needs are estimated at €60 to €70 billion annually (2010-2020)

# Recent negative developments in EU27

## Examples:

- ❑ Stopping biofuel blending after only recently having introduced it
- ❑ A moratorium on support for new RES production, which has an obvious direct & crushing impact on local RES investment
- ❑ Modifications of FiT for existing producers without their consent, cutting expected returns to investors significantly

➔ 17 infringement procedures on internal electricity market

➔ 4 infringement procedures on renewable energy legislation

Spain,  
Portugal,  
Czech  
Republic,  
Estonia.  
Bulgaria ...

Bulgaria ...  
Estonia ...



2021, 2022, 2023...

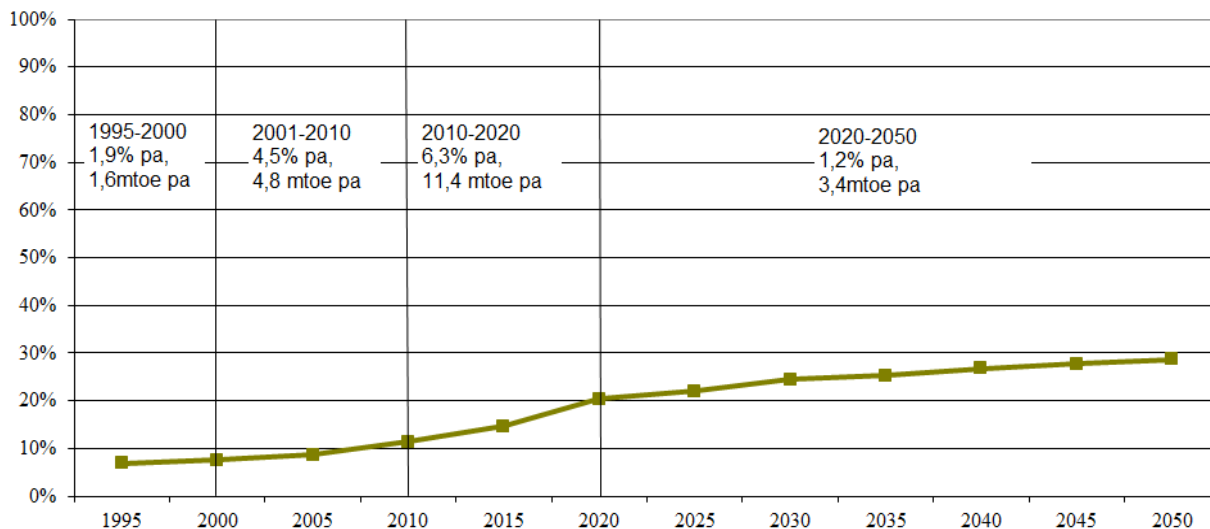


2021, 2022, 2023...



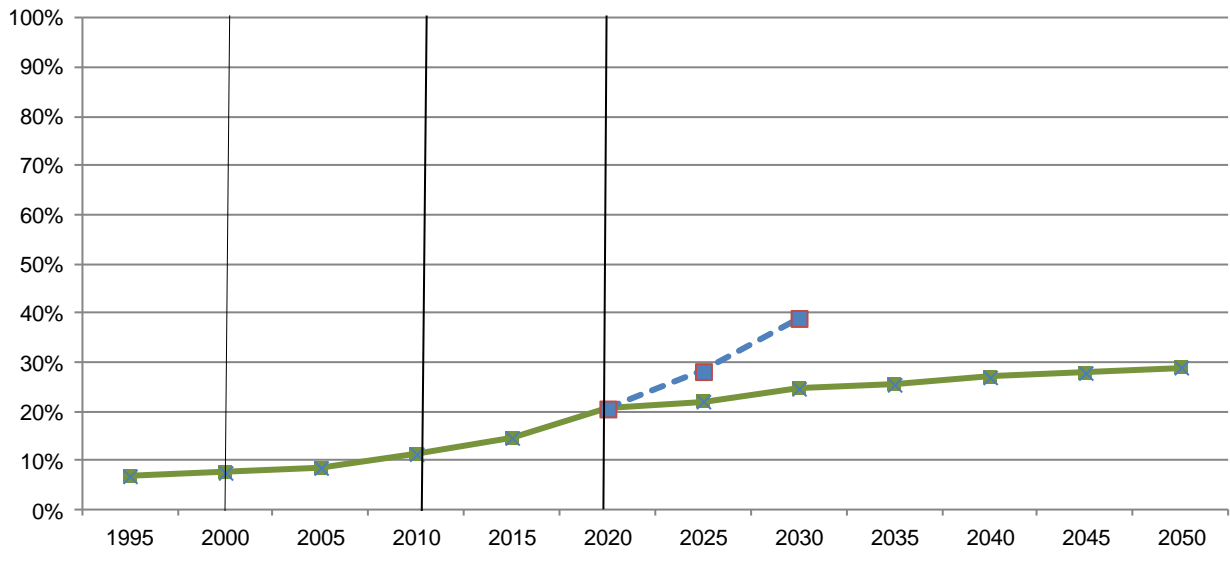


# Historic and projected growth



„Clarity on long term policy is needed to ensure that the necessary investment is made.“

COM (2012) 271 final “RES Strategy”



BAU Roadmap 2050 (%)  
Continued 2010-2020 growth post-2020 (%)



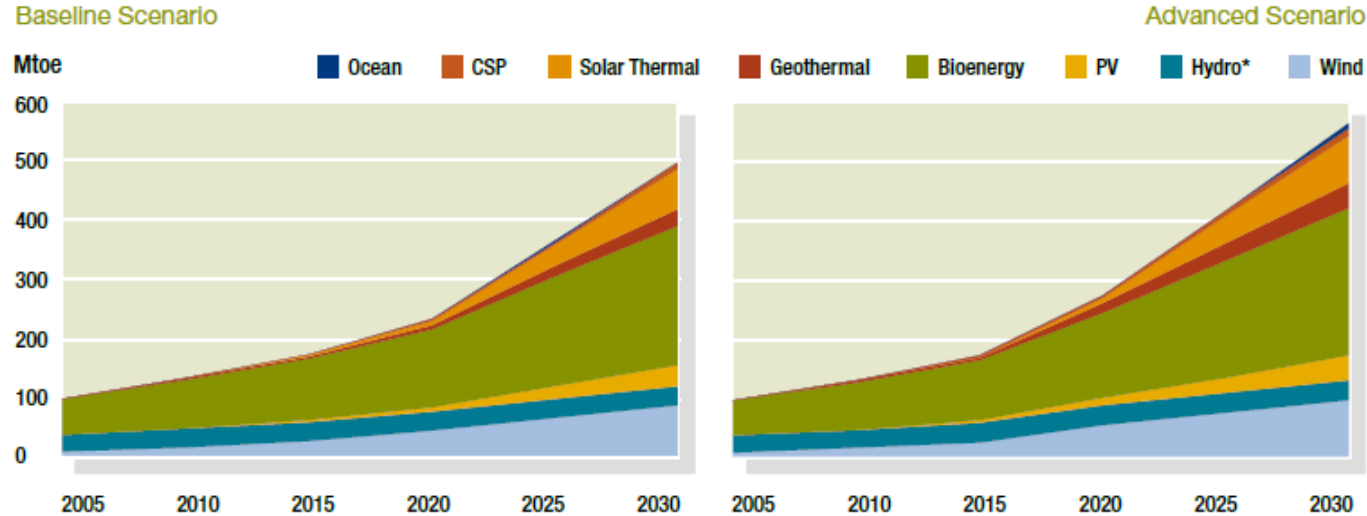
45% by

2030

Towards a truly sustainable energy system in the EU



## Development of different renewable energy technologies until 2030 (Mtoe)



### *Decarbonising the Energy Supply (2030)*

3,750-4,328 Mt of energy related CO<sub>2</sub> emissions avoided

➤ -93-100% of energy related CO<sub>2</sub> emissions

### *Investing in Renewable Energy*

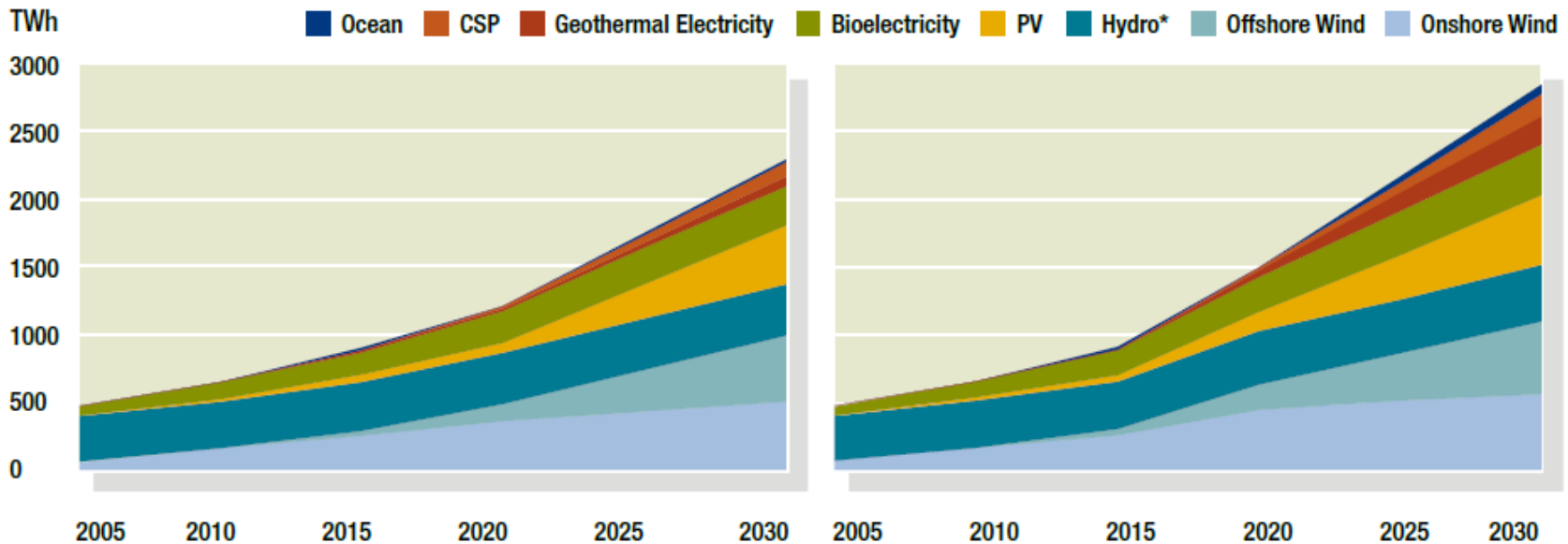
Additional cumulative investments are estimated at €660 billion in 2030

➤ €66 billion additional average annual investments



Baseline Scenario

Advanced Scenario



Source: EREC  
\*excluding pumped storage

*Renewable Electricity Contribution (2030)*



2300 TWh – 2800 TWh  
57%-69% RES-E share (depending on scenario)



# Commissioners Statements on 2030

## **Hedegaard on 2<sup>nd</sup> May 2011 (Guardian):**

*“We should be discussing a renewable energy target for 2030. We need to have ambitious targets. It would be one way to send a long-term price signal for renewable energy – that renewable energy is not just going to stop growing after 2020.”*

## **Barroso on 16<sup>th</sup> June 2011 (IPCC Special Report):**

*“But 2020 is already around the corner and we need to think of intermediate steps up to 2050. (...) We need to provide businesses with a long-term stable policy framework to support their investment decisions. Businesses are already taking their strategic decisions for the next decades. We have to avoid locking in carbon intensive investments.”*

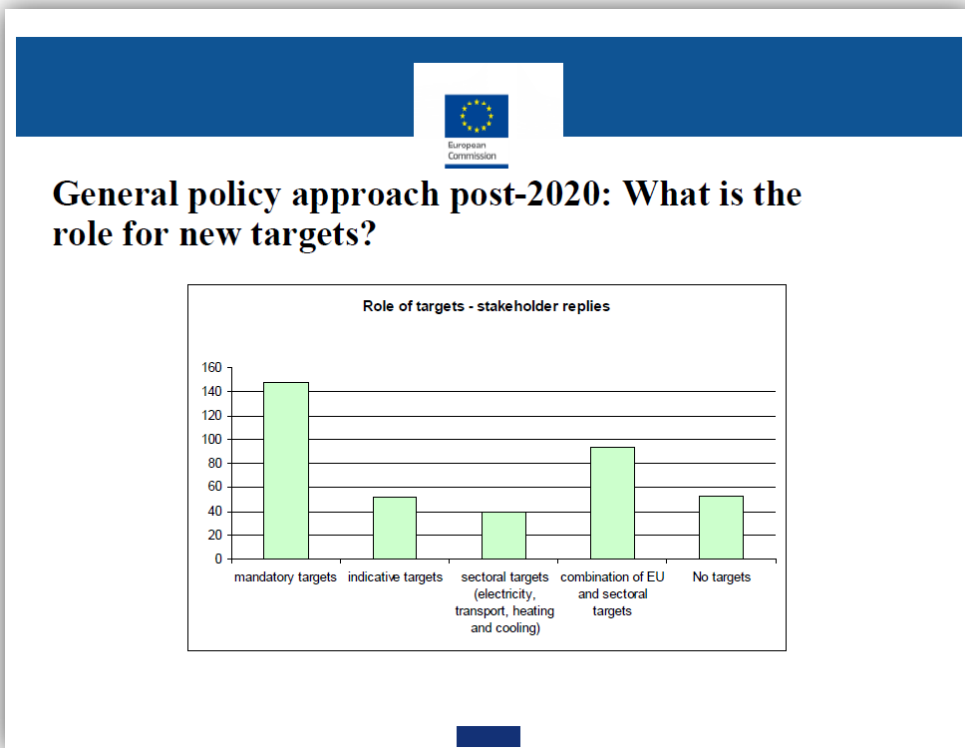
## **Oettinger on 16<sup>th</sup> June 2011 (IPCC Special Report):**

*“We must start to consider a 2030 renewables target. The EU renewable energy industry has already called for a 45 % 2030 target.”*

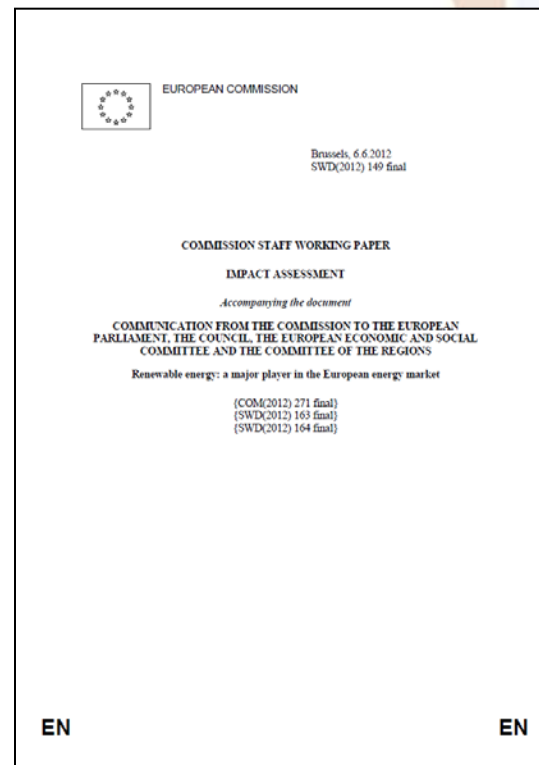




# Public consultation and Impact Assessment



Source: Philip Lowe (Director-General): Stakeholder Conference on the Renewable Energy Strategy, 24/02/2012



Majority of stakeholders want a dedicated 2030 target



IA favours “*Binding renewable energy targets post-2020 and coordinated support*”



# Needed policy support towards 2030



Strong support for „no-regrets“ options

- Energy Efficiency
- Infrastructure
- Renewable Energy

- I. Action Plan for RES Heating and Cooling
- II. Stable RES-E support schemes & guidelines to prevent retroactive changes
- III. Flexibility-driven market design
- IV. A binding 2030 renewable energy target



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Thank you for your attention!

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