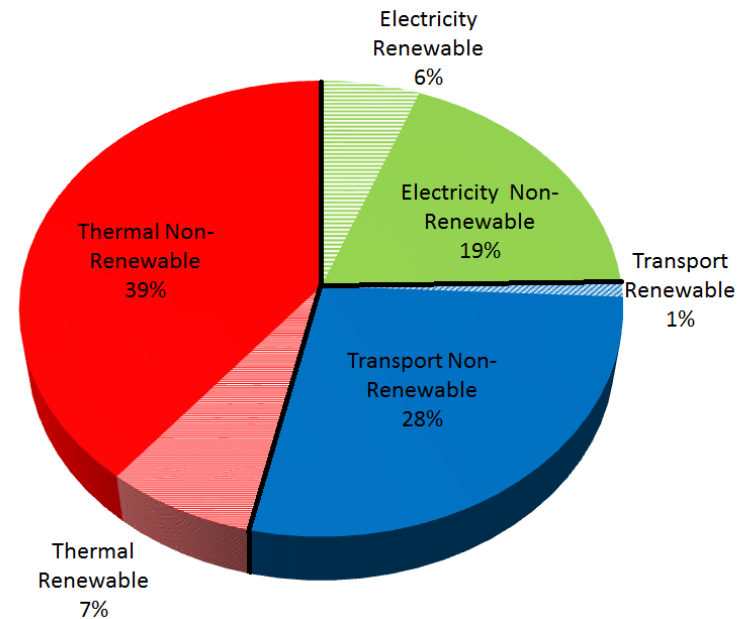


Europe's renewable energy policies: Too much focus on renewable electricity?

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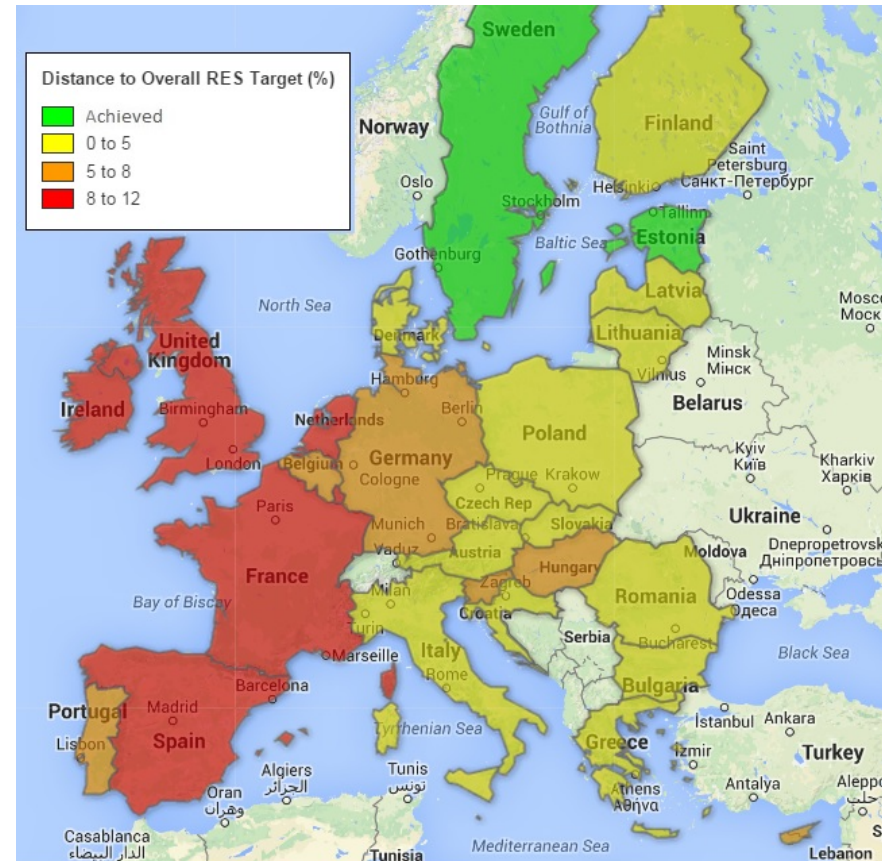
Context

- Member States are making progress towards the 2020 RE target, with a share in 2014 at just over 16%.
- Much of the RE growth in recent years has been in the electricity generation sector.
- The HET argues for a stronger push in other sectors, in order for Europe (and Member States) to meet the 2020 target.
- Further ambition out to 2030 makes this additional focus even more important.



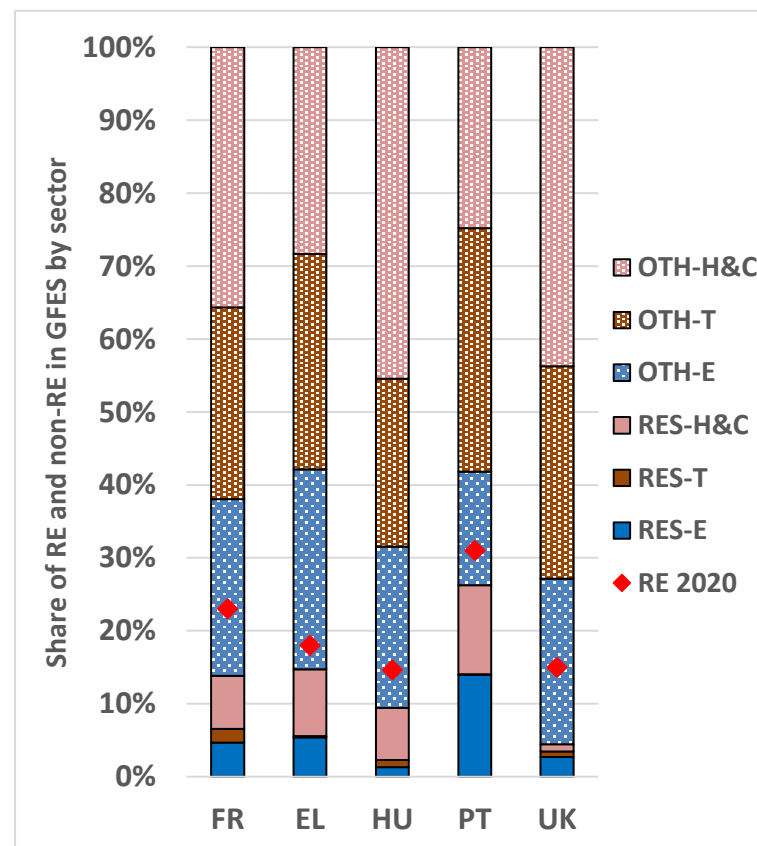
The European situation

- The relative progress across the European Union differs markedly.
- Action is clearly needed in some Member States.
- Electricity accounts for approximately 25% of GFEC, so is limited in additional contribution to overall RE.
- Under NREAPs, projected share of RE in electricity sector to increase from 24 to 34%.



Progress across Member States

- Five countries of focus – France, UK, Greece, Portugal, Hungary
- Progress across different sectors assessed.
- Unique country situations highlight different challenges.
- However, most progress focused on electricity sector, due to resource potential, economics, policy implementation etc.
- Clear lack of progress on renewable energy in transport.



Key challenges going forward

- Efforts in the heat and transport sectors are often less developed; need for long term, stable and comprehensive policy frameworks.
- Transport action is particularly weak, due to sustainability concerns and supply issues.
- It is likely that some Member States will exceed their NREAP shares of electricity, due to benefits of scale, economics and resource.
- Electricity action alone to 2020 unlikely to be sufficient, due to issues of system operation, capital requirements, and range of other barriers (e.g. planning).

Thank you for your attention