



XVIIème FORUM ANNUEL

La transition énergétique et les financements européens

Nice - 5 et 6 décembre 2019

Jean-Marc Leroy, President de Gas Infrastructure Europe

“L’hydrogène dans la transition énergétique : le role des opérateurs”

GIE – the voice for gas infrastructure in Europe



GIE is the European representative association for 70 members in 26 EU Member States. Established in 2005.

GIE represents the sole interest of the infrastructure industry in the gas business under three columns:

 Transmission (TSO)

 Storage (SSO)

 LNG (LSO)

GIE focus on the value created from our assets for consumers and users.

GIE works in focused Working Groups under the Annual Working Program



Affordable decarbonisation cannot be achieved without using the gas infrastructure.
GIE Vision 2050

EU pathway to meeting Paris Targets



2007 *EU Climate Target* - reduce GHG 20% by 2020
 2015 Energy Union - security, sustainability, competitiveness

2016

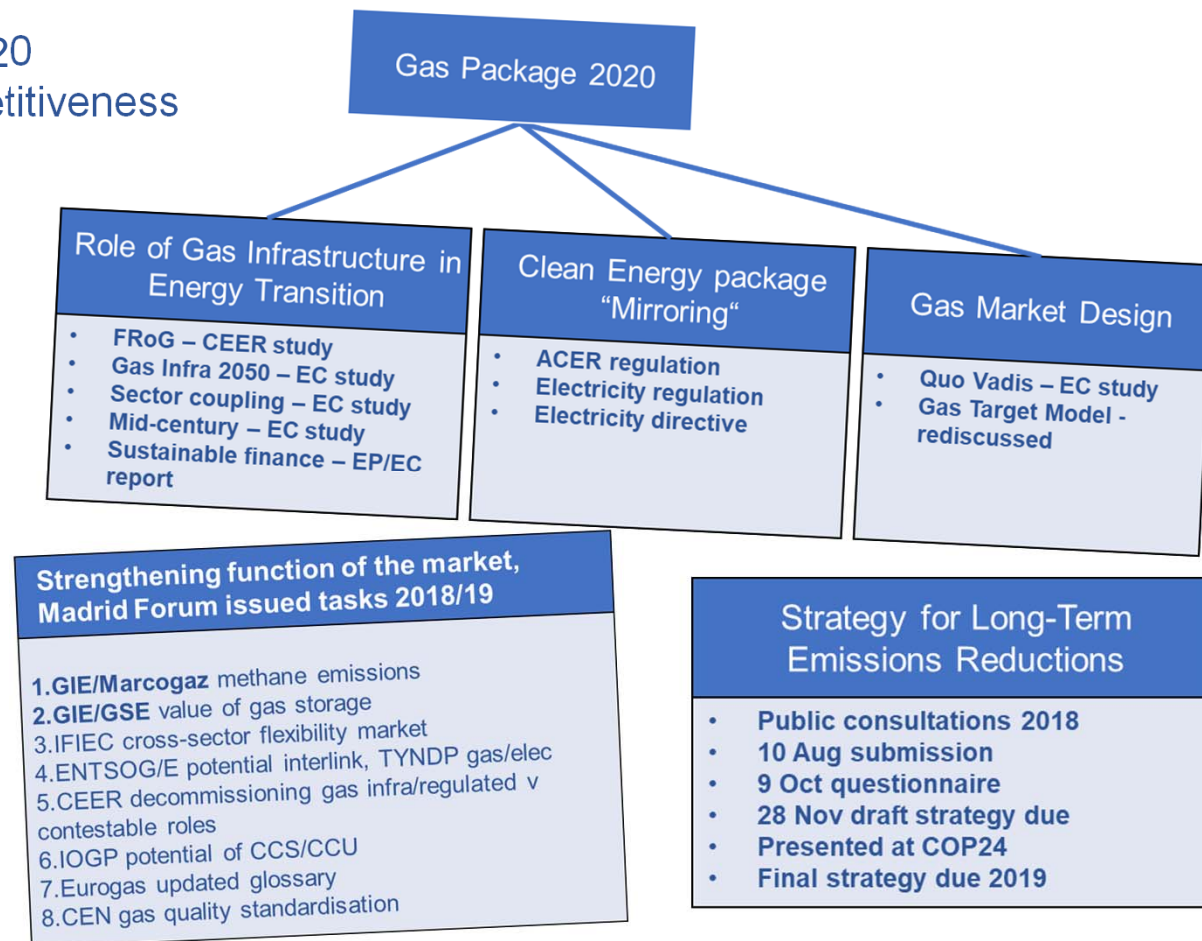
- Paris Targets for 2030
 - reduce GHG 40%
 - Increase energy efficiency by 32.5%
 - Increase renewables to 32%
- *Gas Package 2020* regulatory reform - 3 pillars

2018

- Jun Madrid Forum - 8 new tasks
- Nov *Clean Planet for All*
- Dec *Clean Energy Package* revisions
- Dec NECPs 2021-30

2019

- Sep New Parliament
- In progress – new Commission



Decarbonisation package 2020 – a bundle of legislative amendments



Green Deal

- Deliver first *EU Climate Law* for carbon neutrality
- Instil a *climate culture* in Europe
- Higher emission cuts - 50% by 2030 (& lead int'l 55%)
- Commence *Just Transition Fund* in 1Q20
- 2030 strategies for Biodiversity and Zero Pollution
- Border carbon tax

Now

- 2018 and 2019 studies ongoing
- Await new EC and *Green Deal* (100 days after)
- New EC tasks
- Await *Decarbonisation Package 2020* (replace GP2020)
- €592 Bn allocated to decarbonisation

Impact assessment studies 2018/19

1. Sector coupling
2. LNG market
3. Capacity & Commodity release
4. Non-harmonised tariffs
5. Methane leakage
6. Barriers to entry
7. Tailor-made regulation
8. Biogas & H2 impact

“The Green Deal represents an unprecedented opportunity for Europe to move away from fragmented policymaking.”
EC President, Ursula von der Leyens

Complexities of decarbonising the EU – policy needs to be flexible

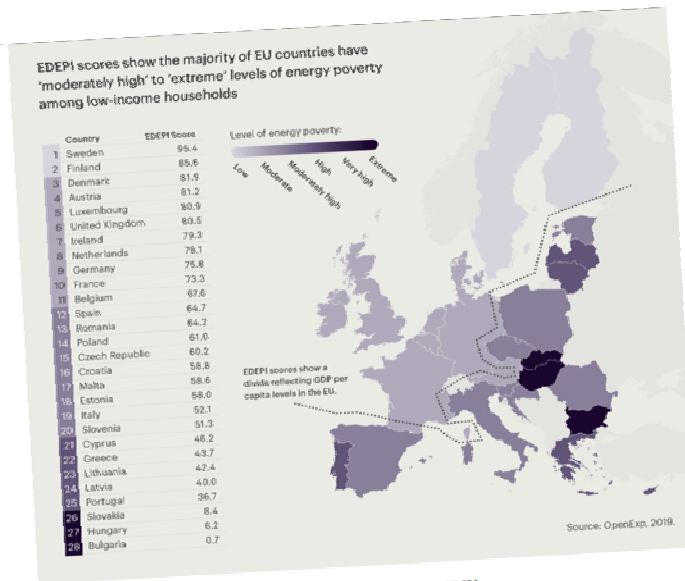
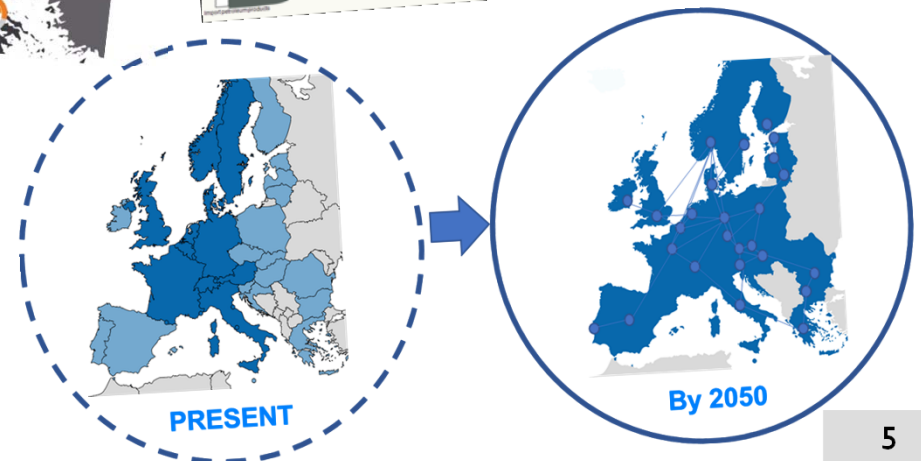
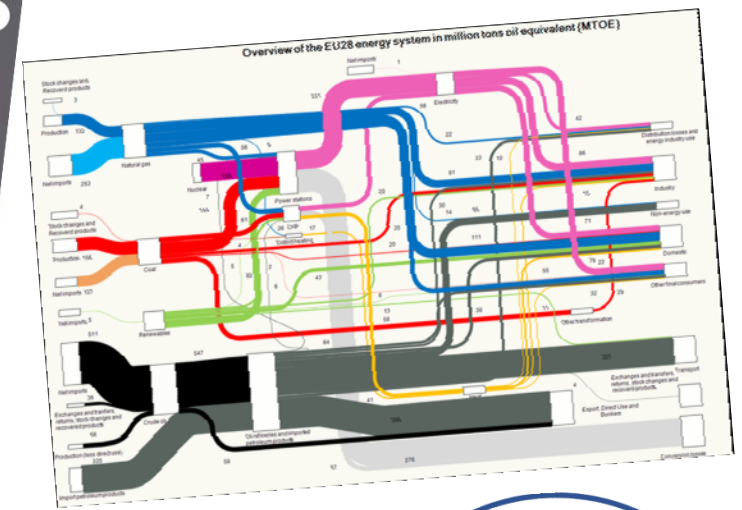
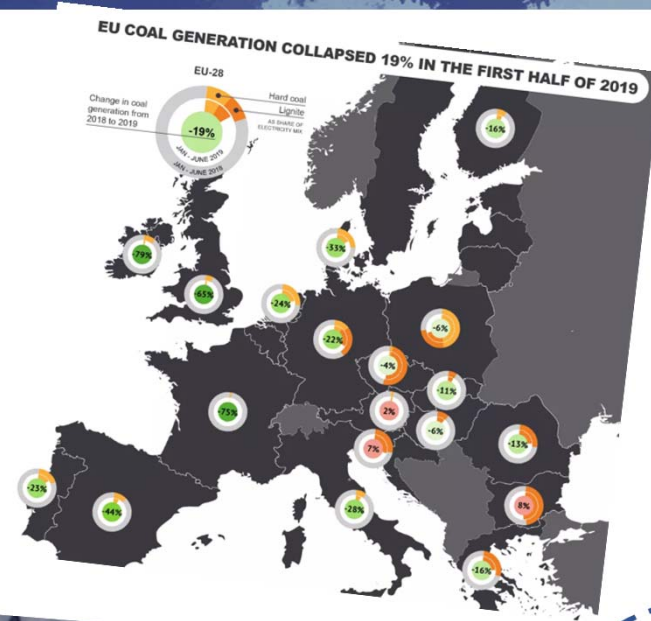


Figure 1 - Ranking of countries based on the EU Domestic Energy Poverty Index (EDEPI)

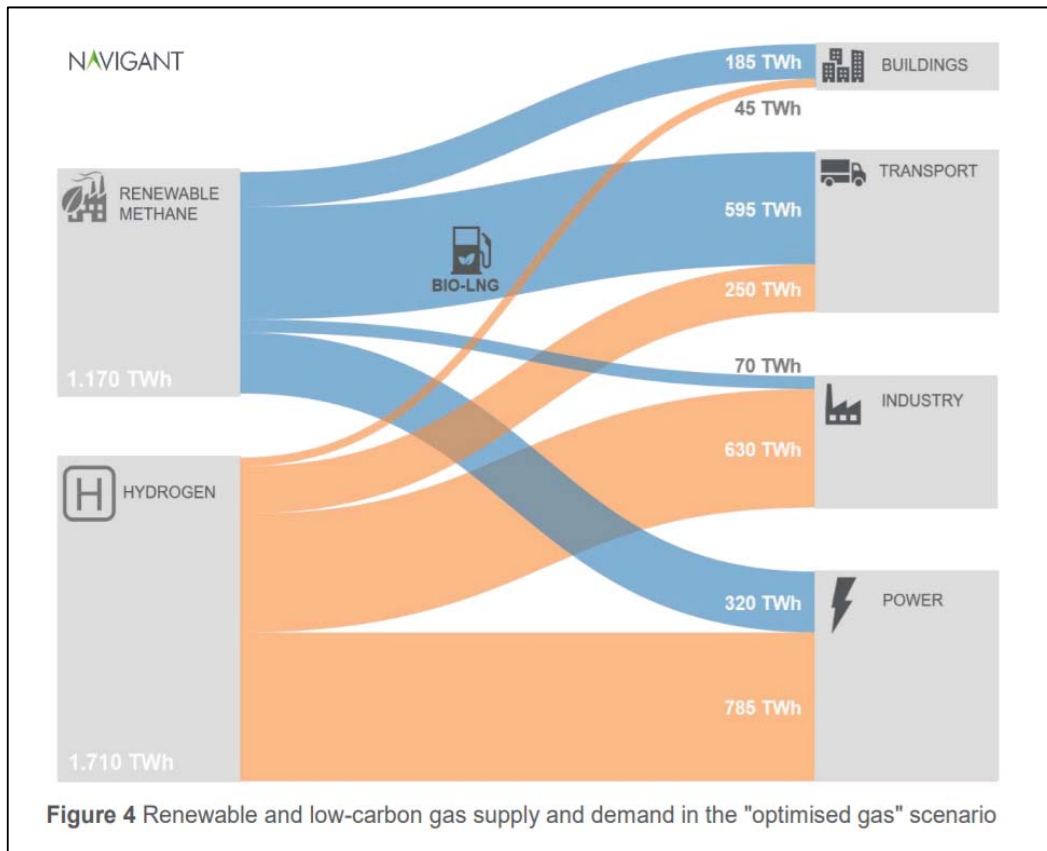


Need for sector coupling and integrated energy solutions for integrated, competitive energy market

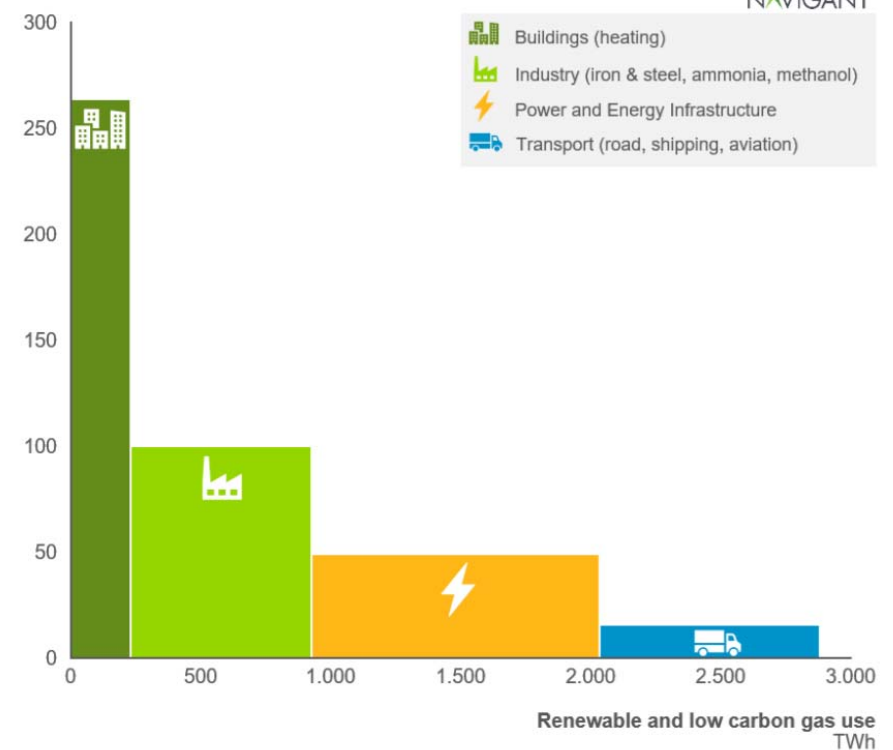


Gas For Climate study March 2019:

Integrated energy system can be fully renewable & save €217 Bn pa



Cost savings per sector
€ per MWh



Biogas is a perfect ally of Energy Transition and provides an answer to a triple challenge



- Territorial growth based on circular economy and responsible agriculture
- Sustainable waste management
- Decarbonized and decentralized energy production

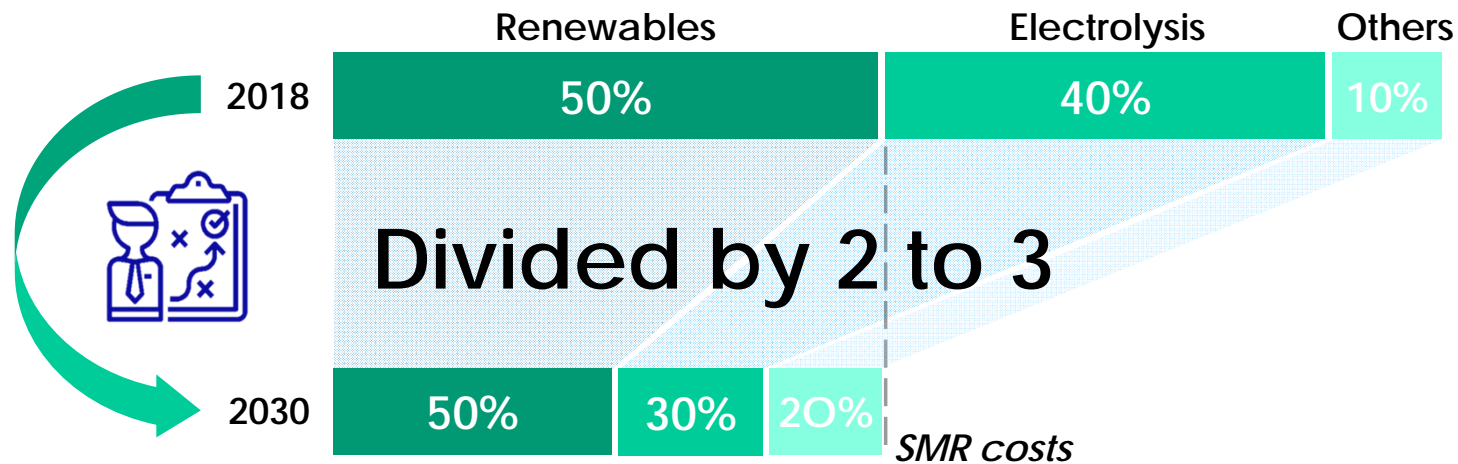


Renewable Hydrogen is the missing link to make a 100% renewable world a reality for territories



"I see a pivotal role for hydrogen in Europe's efforts to achieve its climate goals."
EC vice-President, Frans Timmermans

Parity with grey Hydrogen is reached by 2030
Thanks to manufacturing cost reduction & better efficiency



Key policy asks



Set a vision 2050 with targets for all renewable and decarbonised energy (gas and electricity)

Break down silos in energy sectors

Facilitate technology-neutral **R&D**

Enable trading for all renewable/decarbonised energy by Guarantees of Origin

Establish alternative **cost allocation** and reward positive externalities of gas



Thank you