

# Outcomes of the poll

## 2040 scenarios – Stakeholders/MSs/NRAs views

### What did the stakeholders say (in the order of preference)

2 June 2016 workshop

1. **Global Climate Action-19 votes**
2. **Sustainable transition-14 votes**
3. **Distributed Generation-14 votes**
4. **Subsidised green Europe-6 votes**
5. **Behind targets-4 votes**

### What did the MSs&NRAs say (in the order of preference)

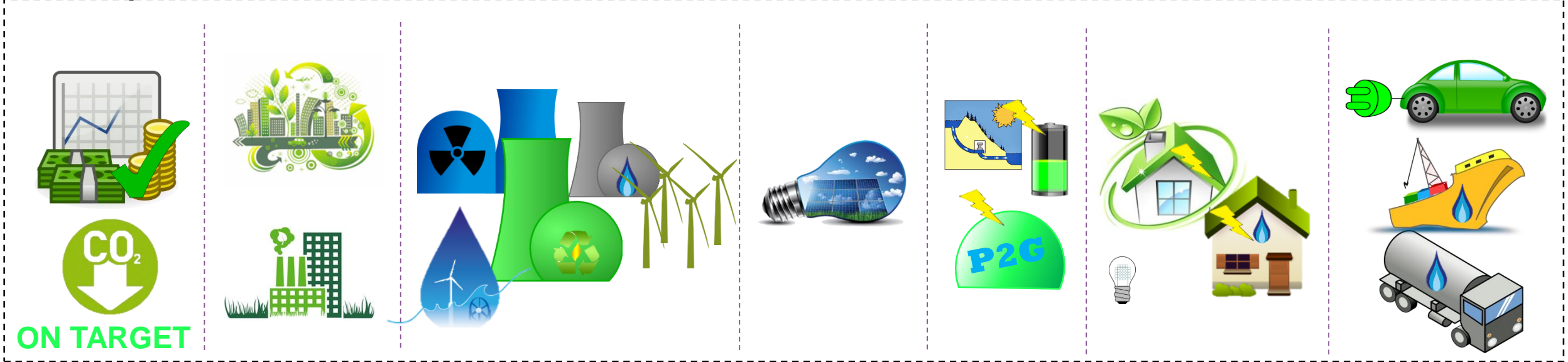
5 July 2016 workshop

1. **Sustainable transition-17 votes**
2. **Distributed generation-17 votes**
3. **Behind targets-12 votes**
4. **Subsidised green Europe-8 votes**
5. **Global Climate Action-5 votes**

# Global Climate Action



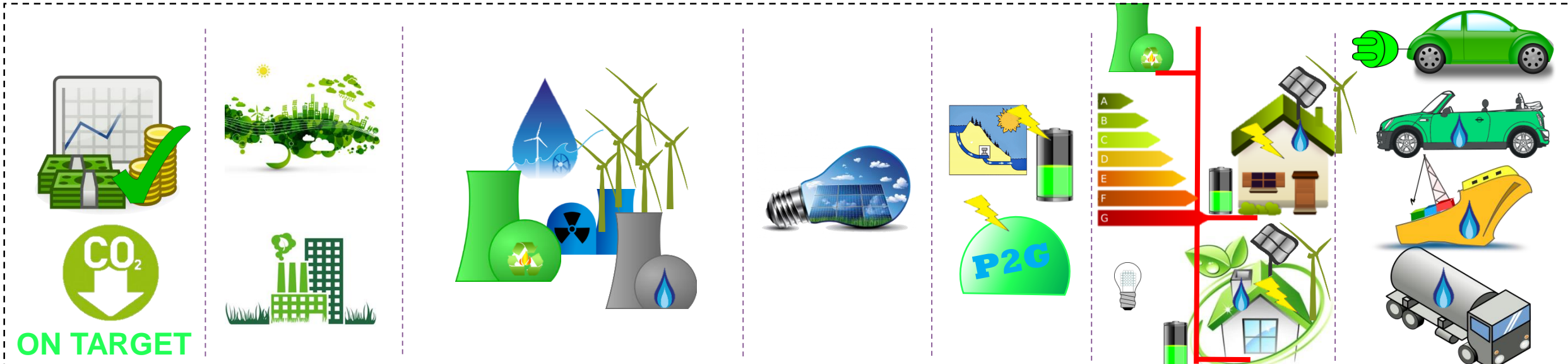
- Global emissions trading scheme
- Efficient use of renewable resources
- Smart cities and demand response very active
- P2G storage commercially available
- Gas significant in the shipping and heavy good transport sectors
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- Electrification occurs in residential and commercial transport
- Gas and Electric are on a par for the residential heating sector. Hybrid heat pumps provide gas peaking capacity to electric heating



# Distributed Generation



- ‘Prosumer’ lead climate action, helped by strong EU Policies and an efficient ETS
- Efficient use of renewable resources at an EU Level
- Supports for peaking capacity required
- Gas significant in the shipping and heavy good transport sectors
- Electrification occurs in residential and commercial transport
- Hybrid heat pumps in new dwellings & existing dwellings giving consumer choice of Electric or Gas.
- District heating is possible



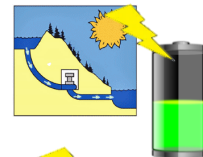
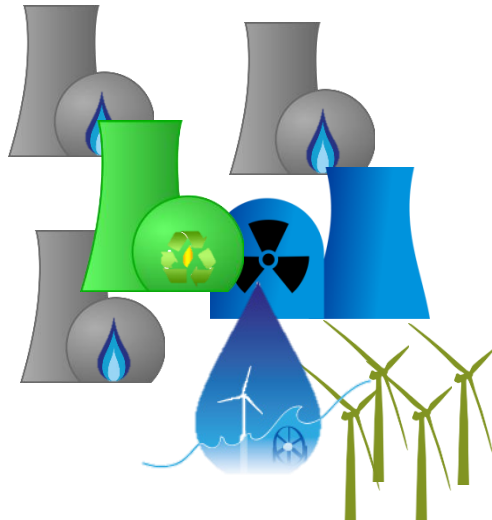
# Sustainable Transition



- National Focus on Climate Change,
- driven by ETS and National Subsidies
- Inefficient use of renewable resources
- Market signals support peaking capacity requirements
- Gas significant in the shipping and heavy good transport sectors
- Electrification occurs in residential and commercial transport
- Hybrid heat pumps in new dwellings, existing dwellings use Gas Heating



SLIGHTLY  
BEHIND



# Behind the Targets



- Low global ambition for climate change.
- Low economic growth.
- Low ETS price and low subsidies reduces
- Low potential for growth of renewable technologies.
- Coal and Lignite are significant in the electricity sector, supports for peaking capacity required.
- Transport sector remains reliant on oil and hybrid technologies.
- Gas heating is the dominant technology for new and existing dwellings.



**BEHIND  
TARGET**

