

# Outcomes of the poll

## 2040 scenarios – Stakeholders/MSs/NRAs views

### What did the stakeholders say 2 June 2016 workshop

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

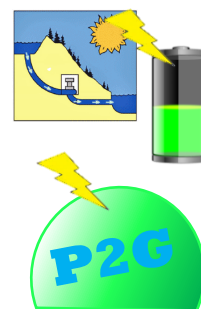
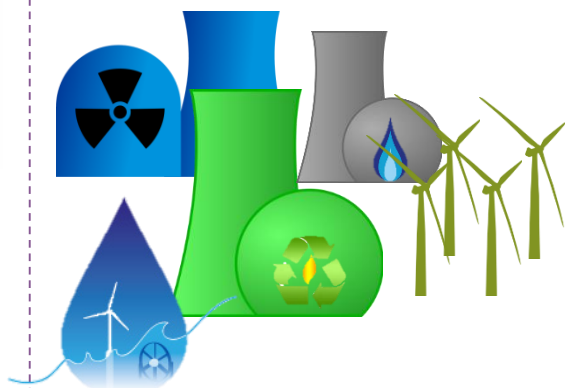
### What did the MSs&NRAs say 5 July 2016 workshop

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

# 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
- shipping and heavy good transport sectors
- 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



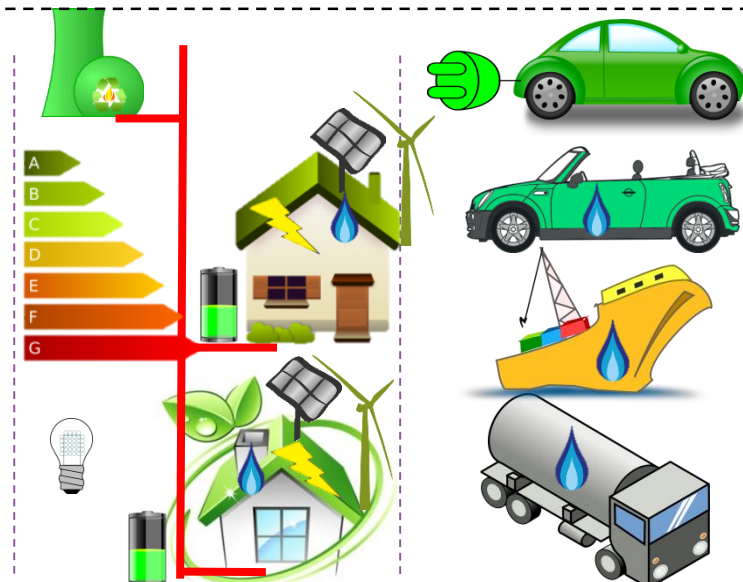
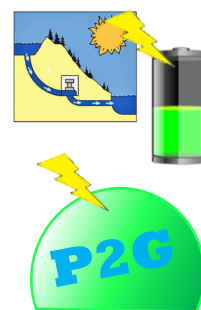
# Distributed Generation



- '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



ON TARGET



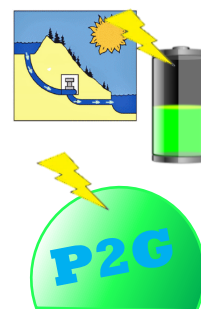
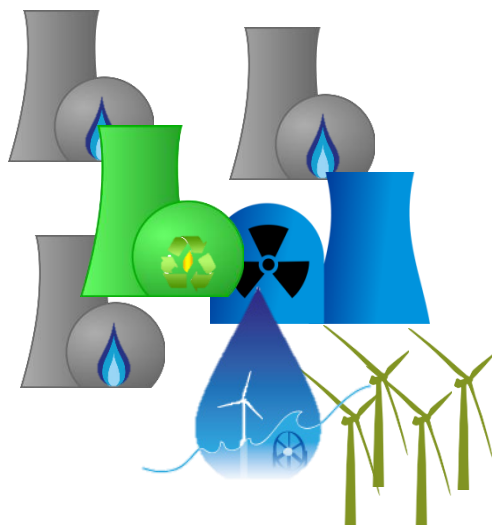
# Sustainable Transition



- 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**

