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# **The role of coal in the present and the future European power mix**

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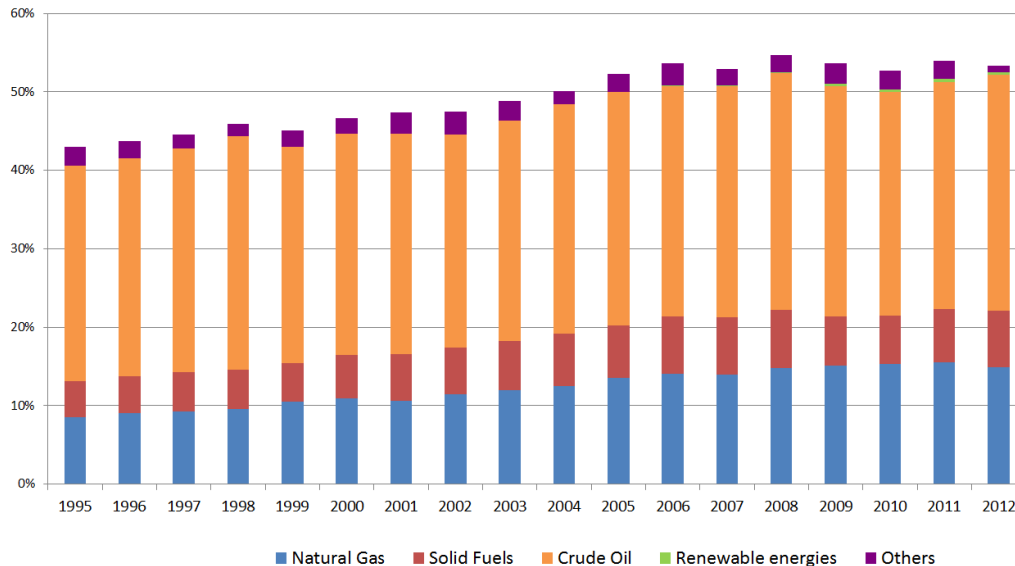
# EU Energy Security Strategy (28/5/2014)

key actions:

1. Immediate actions aimed at increasing the EU's capacity to overcome a major disruption during the winter 2014/2015
2. Strengthening emergency/solidarity mechanisms including coordination of risk assessments and contingency plans; and protecting strategic infrastructure
3. Moderating energy demand
4. Building a well-functioning and fully integrated internal market
5. Increasing energy production in the European Union
6. Further developing energy technologies
7. Diversifying external supplies and related infrastructure
8. Improving coordination of national energy policies and speaking with one voice in external energy policy

# Import dependency has increased

Import Dependence in the EU, %



Source: ESTAT SIRENE v2, Final data as of 02 May 2014

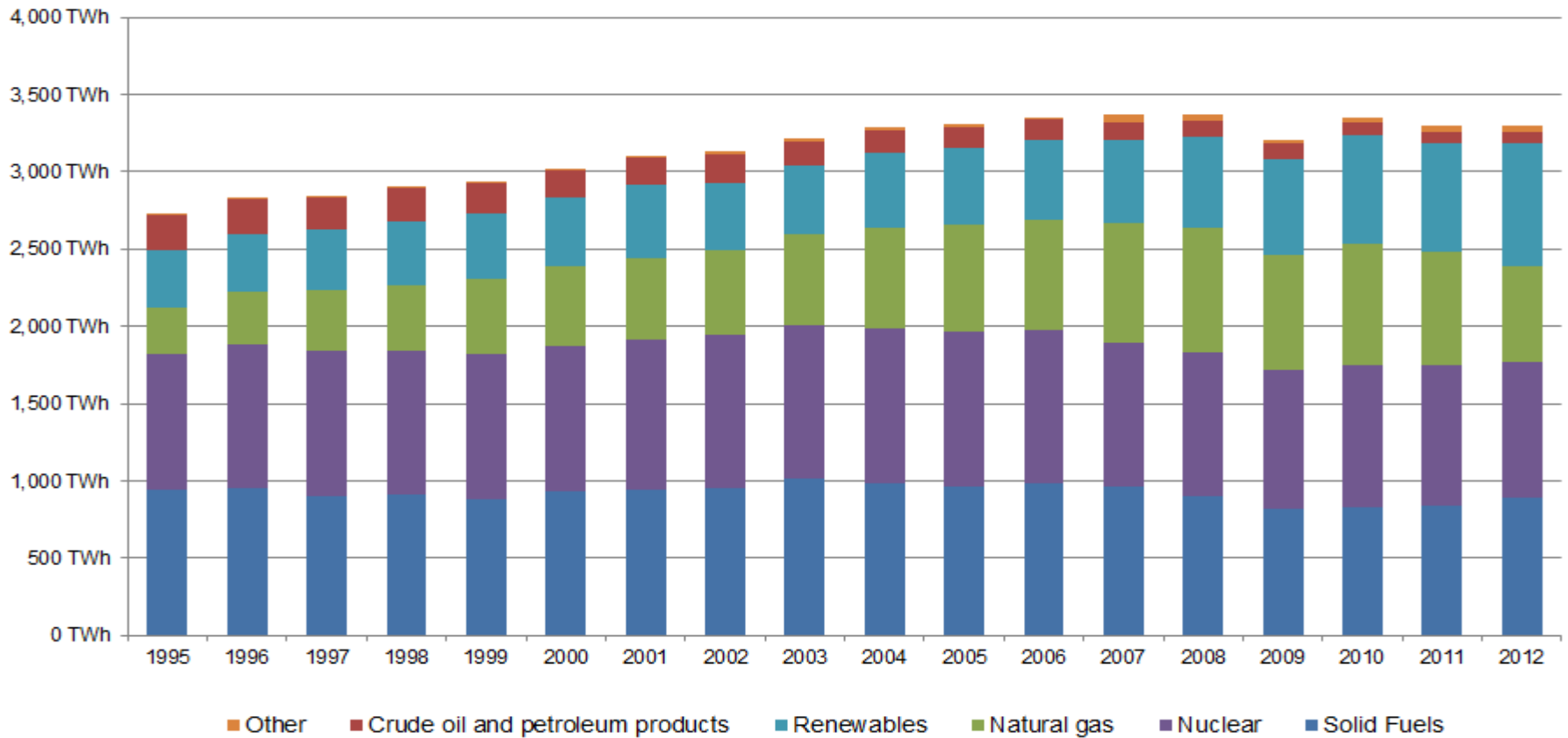
*Since the mid-90s import dependency up by 10 percentage points, but relatively stable in recent years*

*Significant decline in production of oil, gas and coal due to depletion of EU reserves and closures of uncompetitive sources against demand that was steadily growing until 2006, but flattening out since then*

## Indigenous production of energy resources

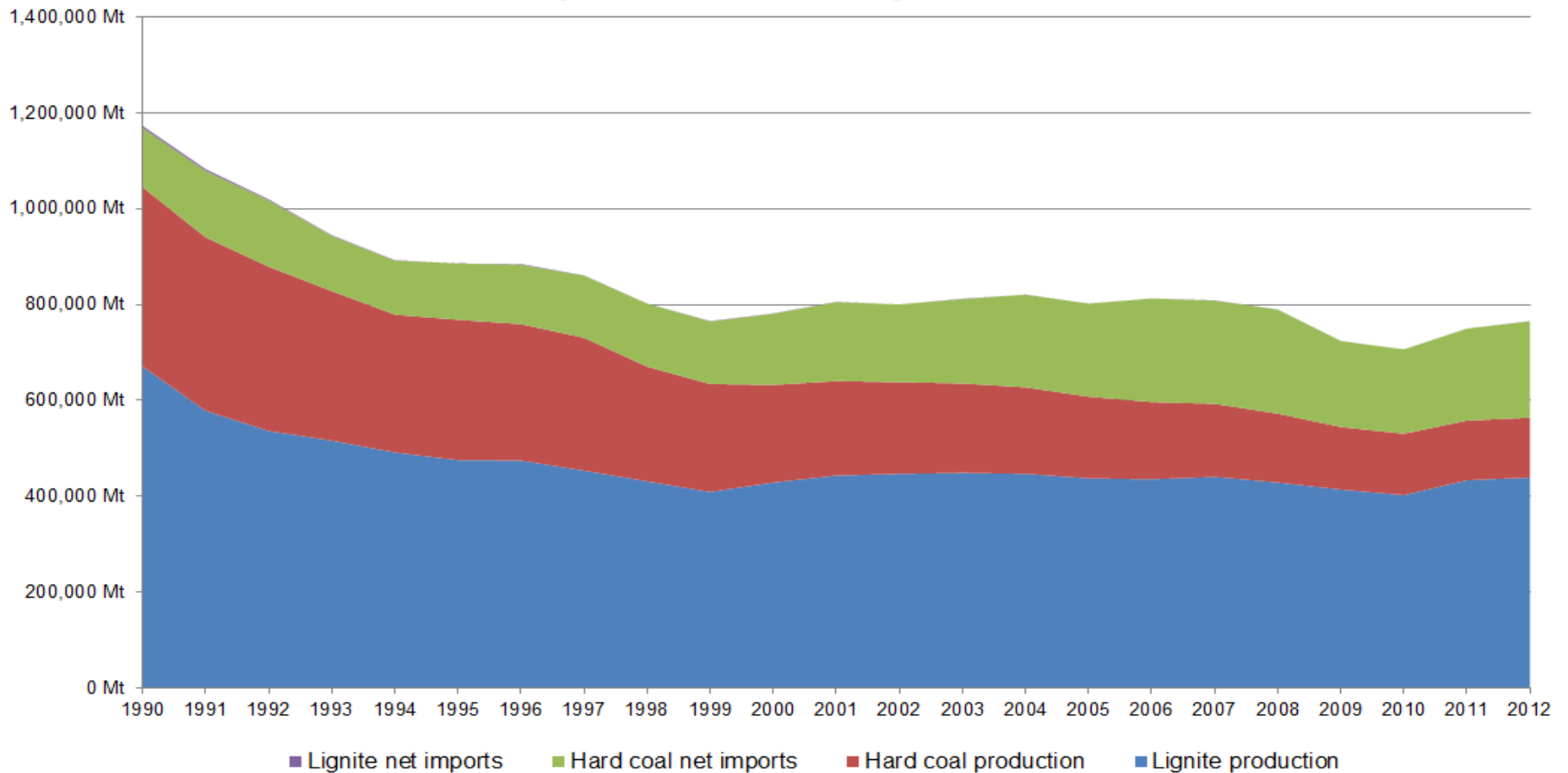
- Further develop renewable energy, more market based and more coordinated
- Assess unconventional gas potential (Recommendation 2014/70/EU); European science and technology Network on shale gas
- Exploit hydrocarbons and clean coal, taking into account decarbonisation
- Develop and demonstrate Carbon Capture and Storage (CCS) (NER 300 Programme, EEPR), review of CCS Directive)

# The share of coal in the EU power mix



# Solid fuels : Production and consumption

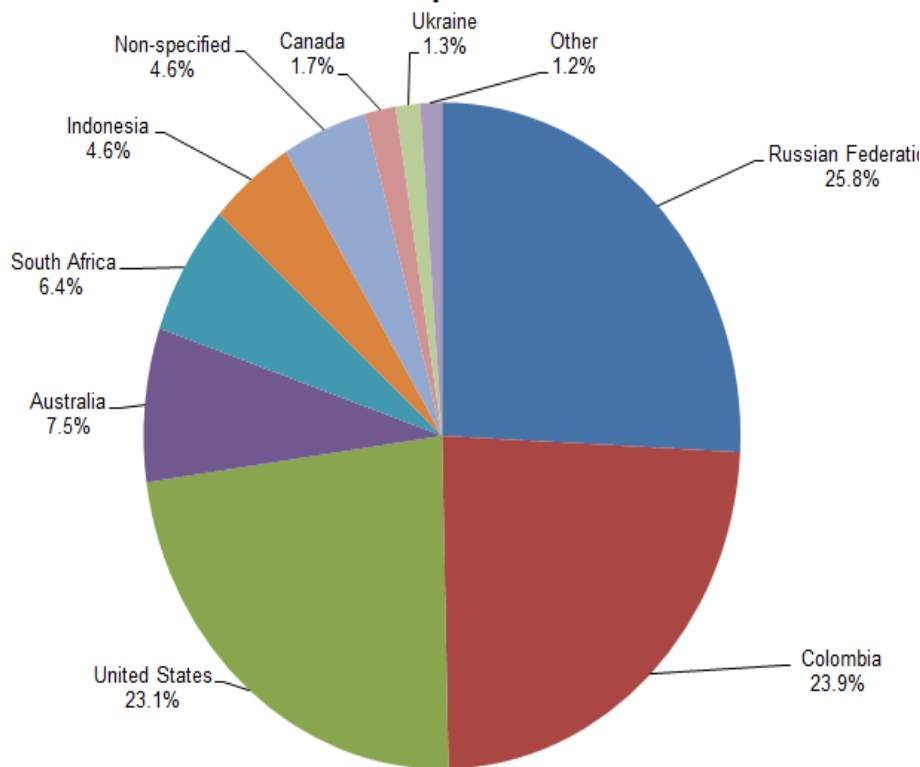
Solid fuels production and net imports in the EU-28



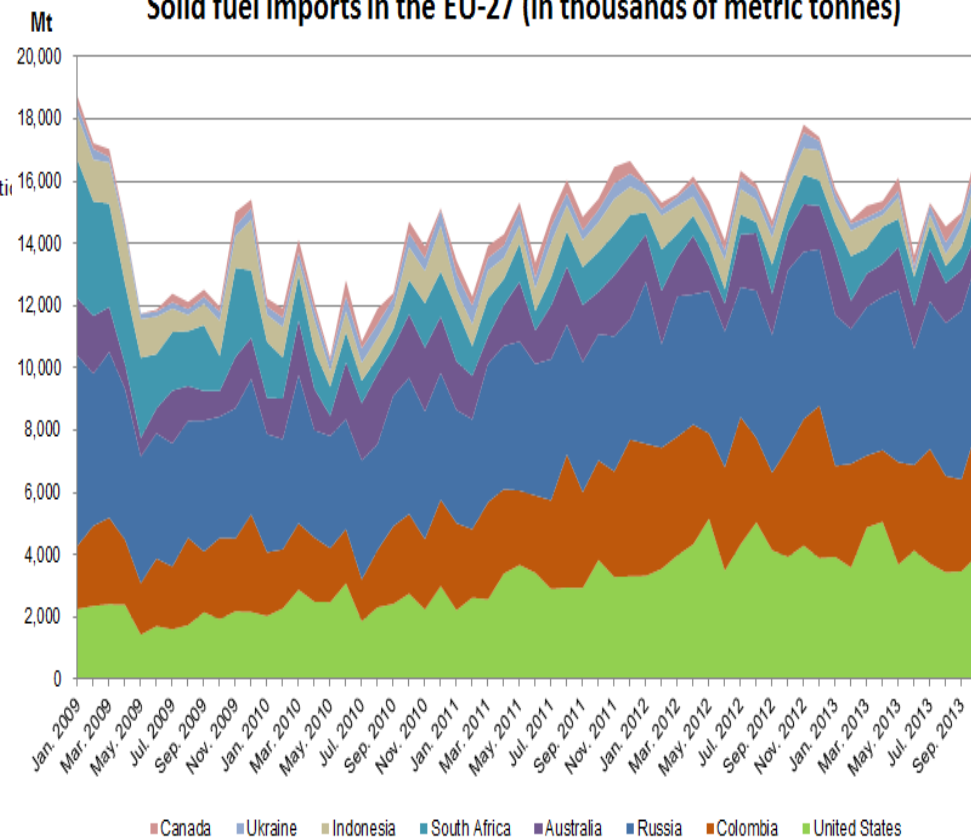
# Where does the import hard coal come from?

Extra EU-28 hard coal imports, 2012

Total imports = 215.2 Mt



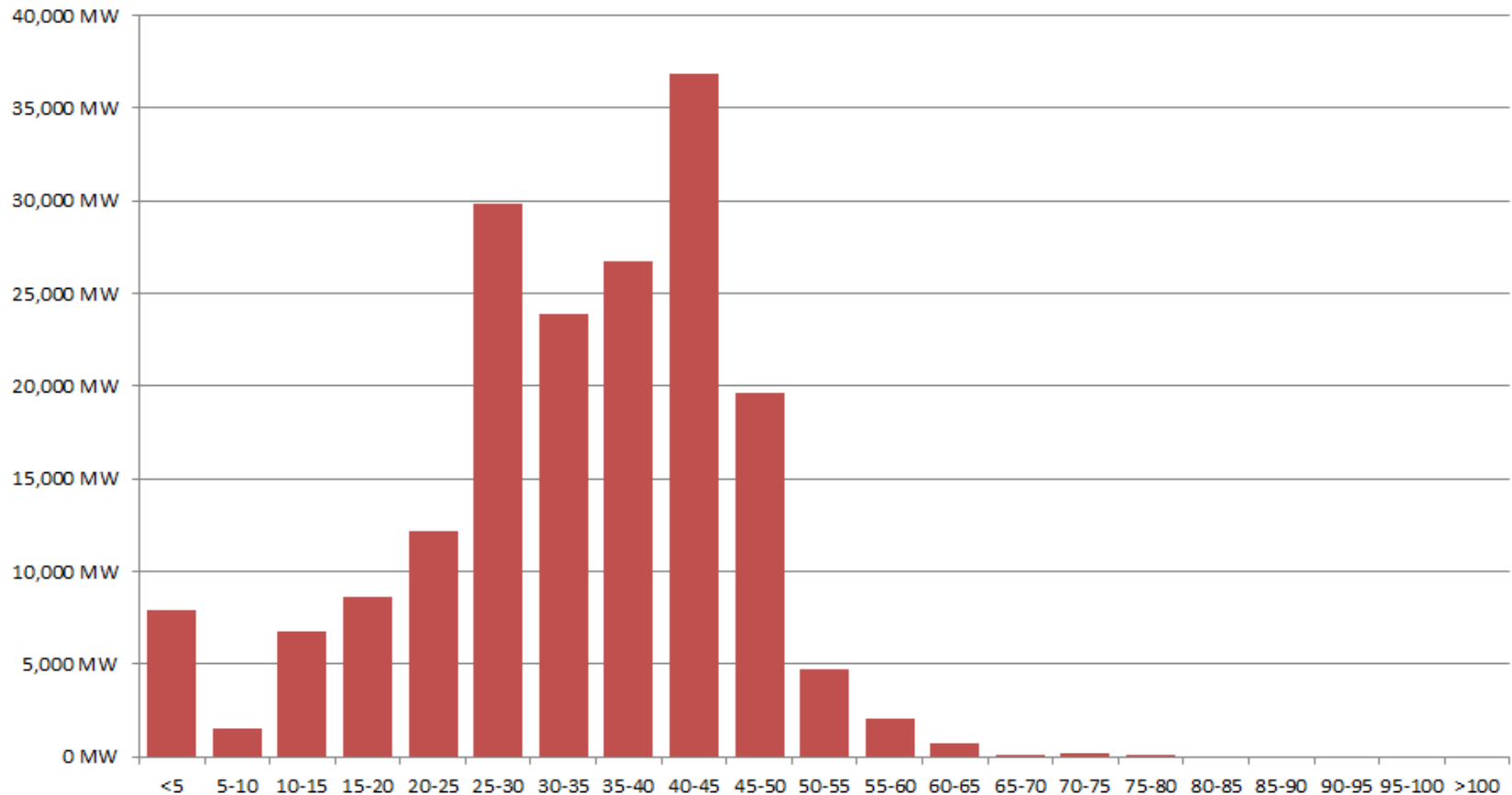
Solid fuel imports in the EU-27 (in thousands of metric tonnes)





# Coal-fired generation capacities in the EU

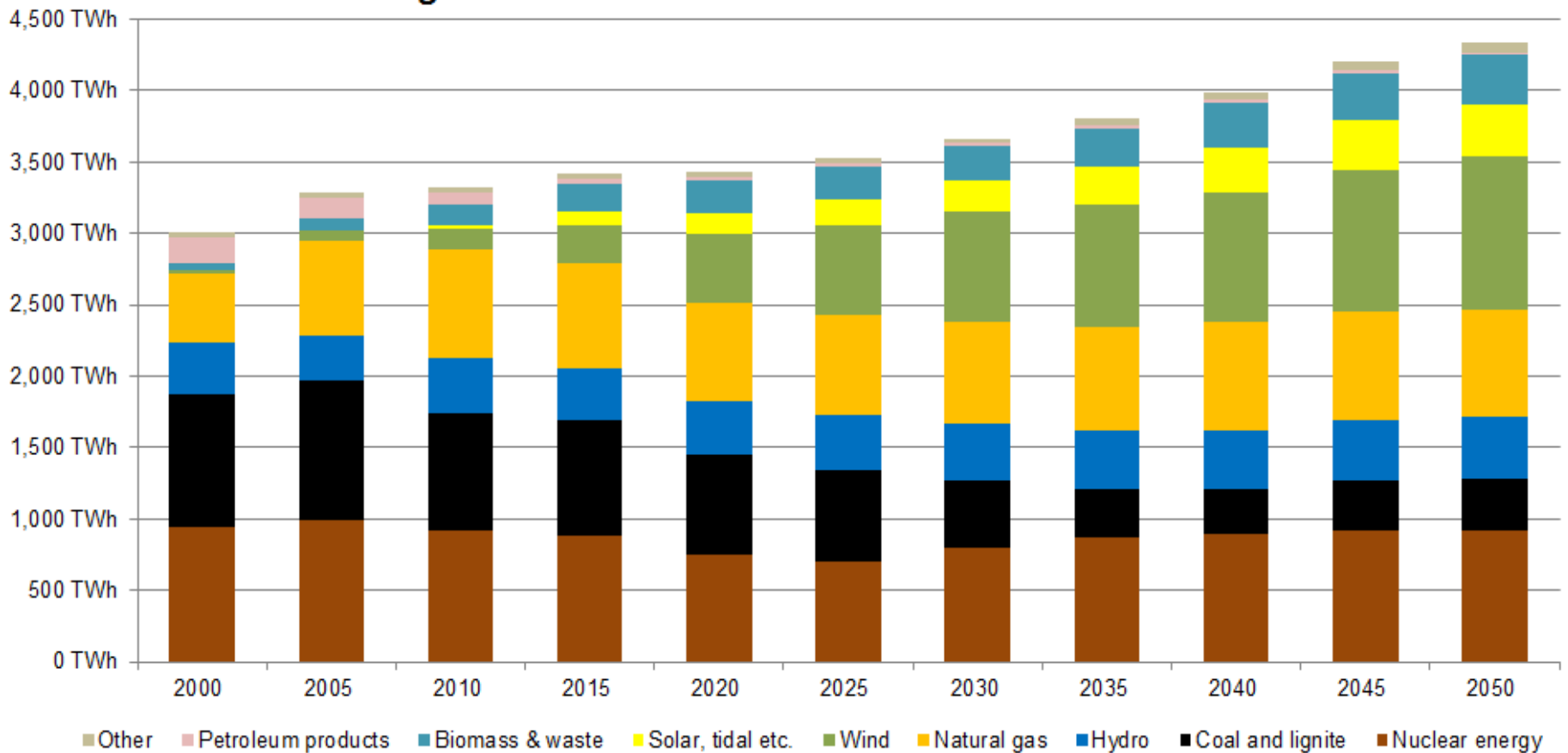
Age distribution of coal-fired power generating capacities in the EU, 2013



Source: Platts

# How the power mix will look like?

Power generation in the EU-28 - 2013 PRIMES Ref. Scenario



Source: 2013 PRIMES



## Conclusion

- Solid fuels important share in energy mix
- Beyond 2020: 40% reduction in GHG emission until 2030 in the EU (Energy and Climate Package)
- Increasing combustion efficiency
- CCS technologies : Need for demonstration projects and work on better public acceptance



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**Thank you!**