



UNITED NATIONS  
UNIVERSITY  
CRIS

Institute on Comparative Regional Integration Studies



## Future Trends Series - GR:REEN Project

### Title of the report

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**Power Statistics and Trends 2013**

### Area

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Energy and environment

### Reporter

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Union for Electricity Industry (EURELECTRIC)

### Type of the Reporter

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Sector Association

### Periodically updated?

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Yes

### First issued year

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2009

### Latest update

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2013

### Official website

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<http://www.eurelectric.org>

### Language available

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English

### Short summary

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The report by EURELECTRIC presents a comprehensive and independent analysis of the European electricity sector, based on the latest available data from 33 EURELECTRIC member countries – the 27 EU Member States, Norway, Turkey, Switzerland, Bosnia-Herzegovina, Serbia and Ukraine.

Starting from the most significant developments in the period 2010 – 2012, it provides an outlook of major trends up to 2030 and a comprehensive picture of current issues and expected trends.

### Key trends

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- The current tendency is characterised by regulatory uncertainty and increased national intervention on energy policy, leading to a slowdown – if not setback – of energy market integration in Europe.
- Electricity demand is forecasted to stagnate mostly due to the economic crisis and the increasing prominent role of energy efficiency policies implemented throughout Europe. "This overall picture of stabilization conceals widely varying developments across the region, with some countries experiencing a growth in demand, others a decline, and yet others reporting stagnating electricity demand."
- "Europe goes black and green": EURELECTRIC members expect EU to shift from the recent trend of 'Renewable Energy Source (RES) plus gas' to 'RES plus coal'; renewable resources and coal-fired

generation are forecasted to grow, while this will be accompanied by a significant drop in gas-fired and nuclear generation.

- RES capacities are expected to keep increasing, albeit at a slower rate as national RES support policies continue to change.
- The trend at play in Europe is that energy supply as well as network costs are gradually reducing, whereas taxes and levies are piling up. In parallel, electricity bills are on the rise, “propelling affordability and industrial competitiveness concerns to the fore of the energy policy debate”.
- EURELECTRIC members do not believe the trend of a black and green scenario – in which emissions are expected to rise – to be sustainable, and so they anticipate a switch from coal to gas by 2020.

## Suggestions

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- Greater attention should be paid to alleviate the multiple overlapping energy priorities, in order not to lose control and reverse progress made on market integration in previous decades; “in light of this worrying trend DG Energy has also published legally non-binding guidance on RES support and RES cooperation mechanisms”.
- EURELECTRIC members suggest that “the driver for more gas would not be the Emissions Trading Scheme (ETS), but rather various effects of the Industrial Emissions Directive (IED) and newly set up capacity markets supportive to gas”.
- The chosen path regarding the development of RES in the EU should try to avoid “cost overrun and market distortions, ultimately threatening power systems and RES development itself”.
- Continuing the climate agenda and reinforcing the instruments needed to achieve it should be among policy makers’ main objectives for the years ahead.

## Methodology

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Modelling

Reference to other trends reports? If yes, which reports?

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