



The background is a map of Europe with various callouts for gas infrastructure. The callouts include: 'Ile of Grain (Grain LNG) Start-up: 2003 nationalgrid', 'Dunkerque Start-up: 2016 Bankers LNG', 'Zeebrugge Start-up: 1997 FLUXYS', 'Eemshaven Start-up: 2011 Gasunie', 'Rotterdam, Gate terminal Start-up: 2011', 'Rostock Start-up: 2011 Gazprom', 'Swinoujscie Start-up: 2016 Gazprom', 'FSRU Polish Baltic Sea Coast Start-up: 2020 Gazprom', 'Kaliningrad Start-up: 2018 Gazprom', 'Montoir de Bretagne Start-up: 1980 elengy', 'Bilbao Start-up: 2003 BQ7', 'Porto Levante Start-up: 2009 Arco LNG', 'Trieste Start-up: 2020 gasNatural', 'Krk Island, Omil, FRU Start-up: 2019 lng', and 'Krk Island LNG Terminal Start-up: 2023 lng'. The map also shows major cities like London, Paris, Berlin, and Warsaw, and bodies of water like the Atlantic Ocean and the Bay of Biscay.

EU policy on gas & the European gas Landscape

Frida Kieninger - Food & Water Europe

The Energy Union

- *The Energy Union is about more than energy and the climate alone: Its about accelerating the modernisation of Europe's entire economy, making it low carbon and efficient in energy and resources, in a socially fair manner."*
- Cornerstones:
 - Security, solidarity & trust
 - Fully integrated European energy market
 - Energy efficiency
 - Decarbonising the economy
 - Research innovation & competitiveness



Narrative on gas – EU level

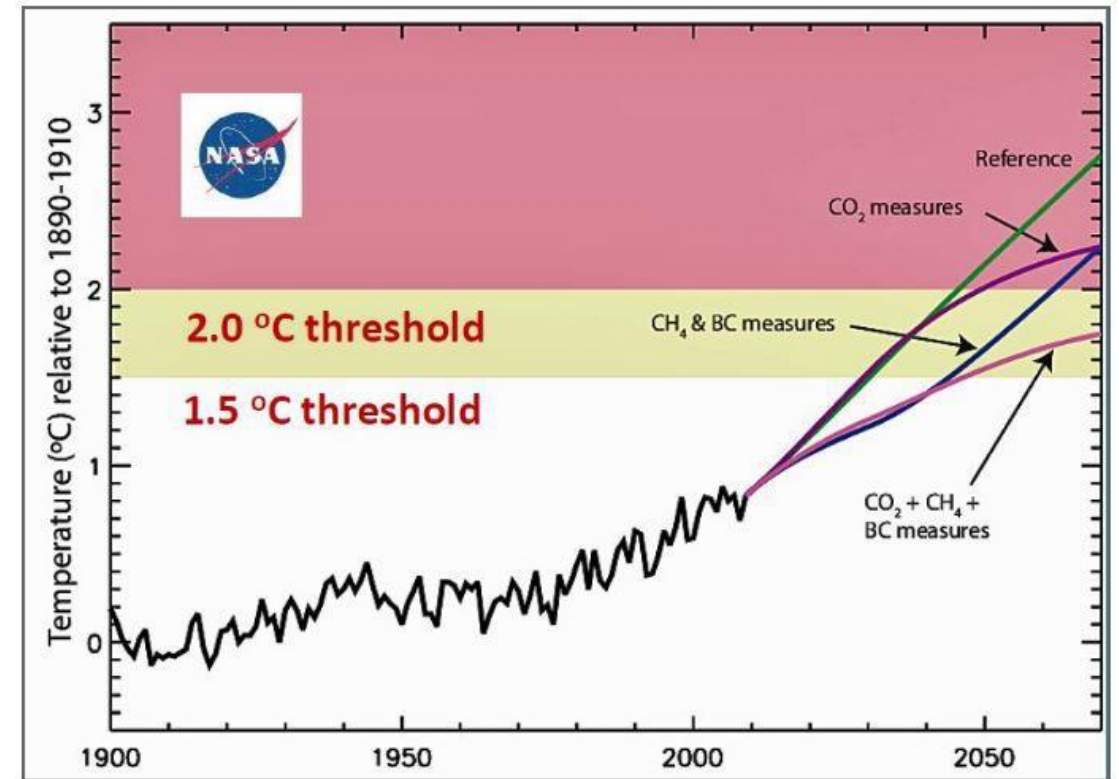
- gas is a cleaner alternative to other fossil fuels
- we need gas as a transition fuel
- EU needs more gas infrastructure for security of supply
- after Ukraine crises 2006 & 2009:
independence from Russia
- lobby power: also renewable associations
lobby for gas

EU ENERGY & CLIMATE TARGETS

- **Paris Agreement** (hold “the increase in the global average temperature to well below 2°C [...] and to pursue efforts to limit the temperature increase to 1.5°C”)
- **EU 2050 climate objective** (“reducing greenhouse gas emissions to 80-95% below 1990 levels by 2050”)

CLIMATE IMPACT OF GAS

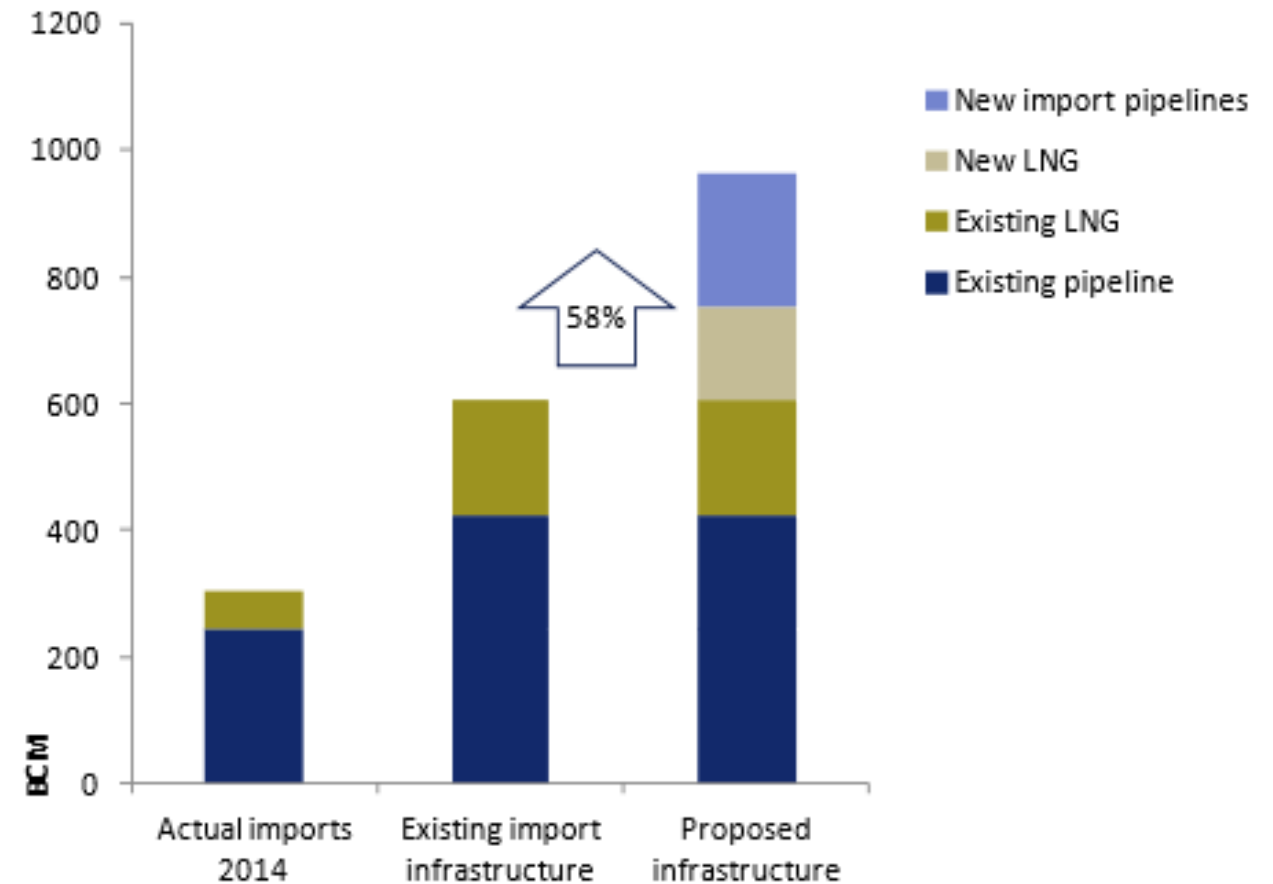
- Methane: 86x higher global warming potential than CO₂ (20 year timescale) – IPCC
 - Conventional gas: 3.6%-5.4% methane loss
 - Unconventional gas: up to 12%
- Need to tackle CO₂ AND methane emissions



Source: Shindell and others (2012). Science 335: 183-189.

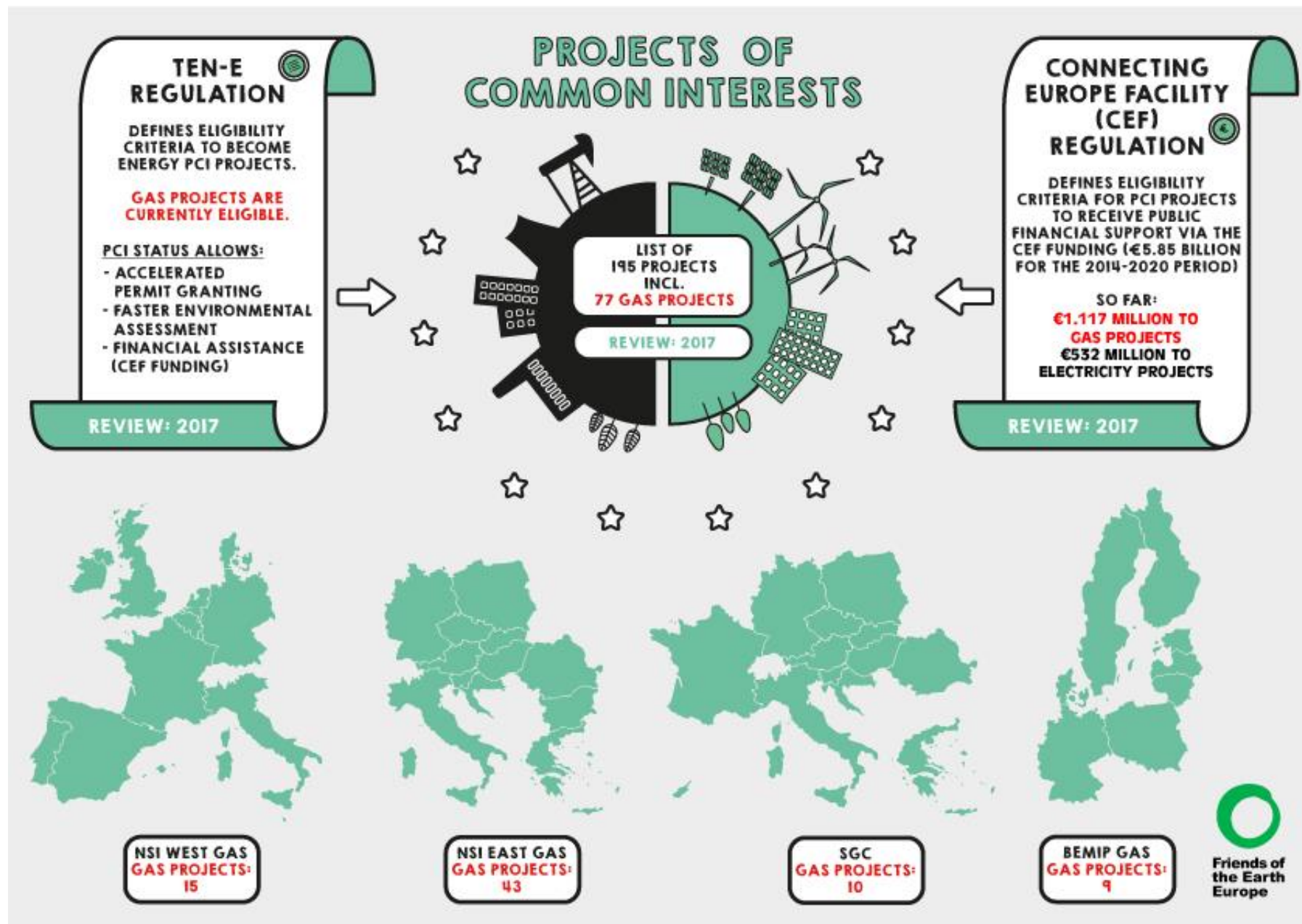
GAS IN EUROPE – A PUSH FOR MORE UNNEEDED INFRASTRUCTURES

- Gas infrastructure has a long lifespan: Fossil fuel lock-in
- Risk of stranded assets
- Money should be shifted to RES and Energy Efficiency



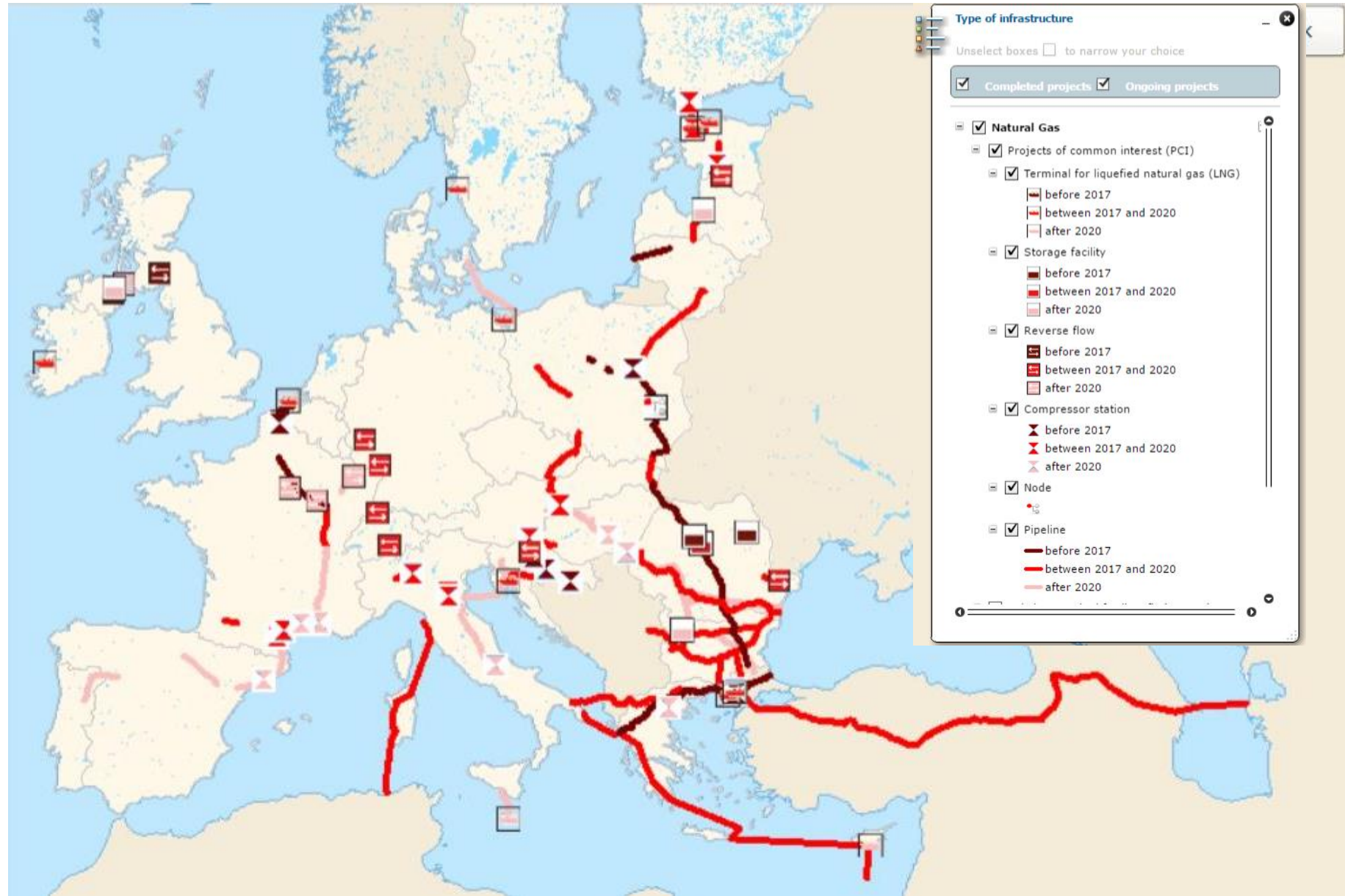
EU ENERGY INFRASTRUCTURE POLICY

THE LIST OF PROJECTS OF COMMON INTEREST (THE PCI LIST)



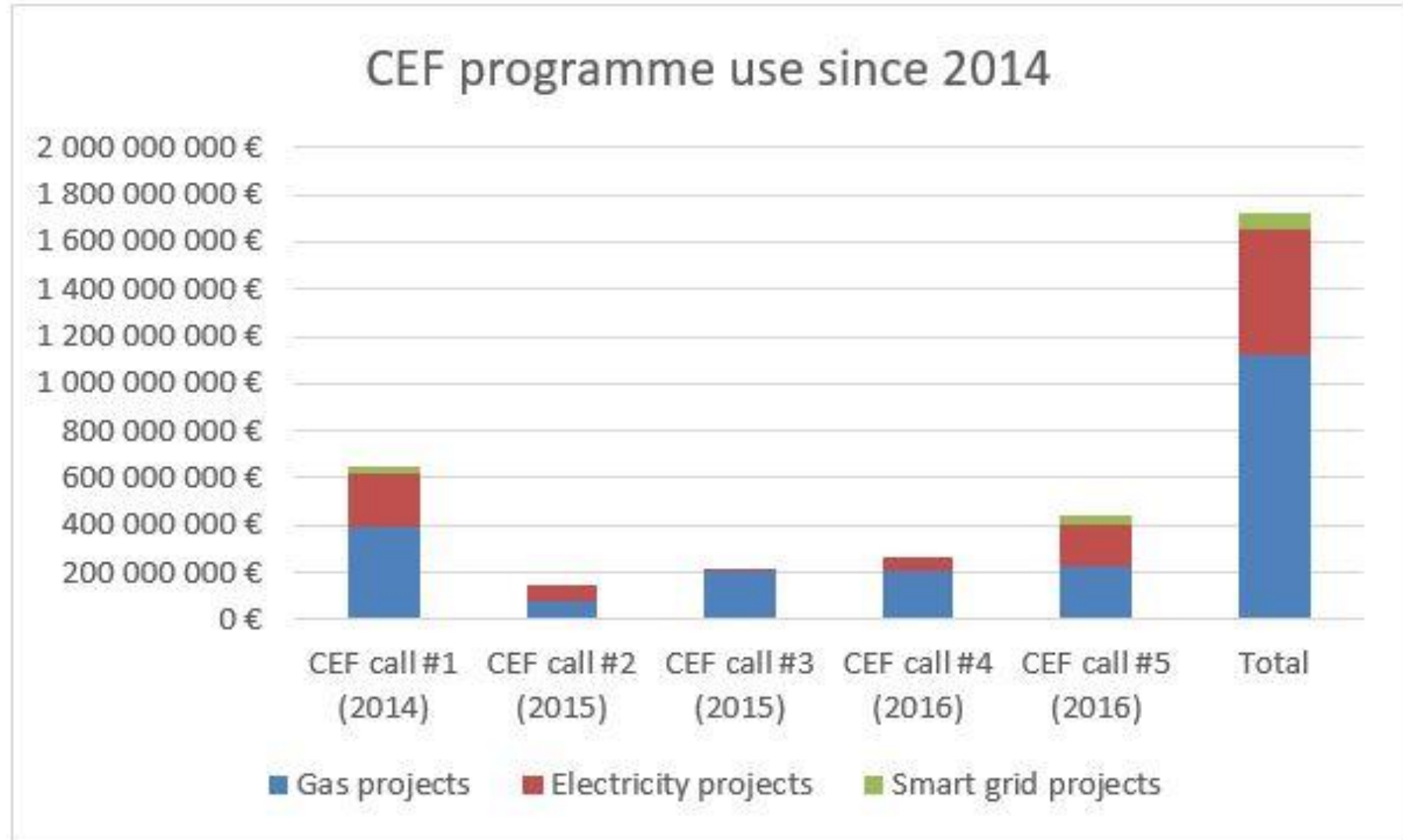
EU ENERGY INFRASTRUCTURE POLICY

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EU ENERGY INFRASTRUCTURE POLICY

THE LIST OF
PROJECTS OF
COMMON INTEREST
(THE PCI LIST)



THE EUROPEAN GAS MAPPING

FIGHT AGAINST NEW GAS INFRASTRUCTURE

Click on the map or a country name for specific information about that country. Click on a region name for regional facts & figures about gas.

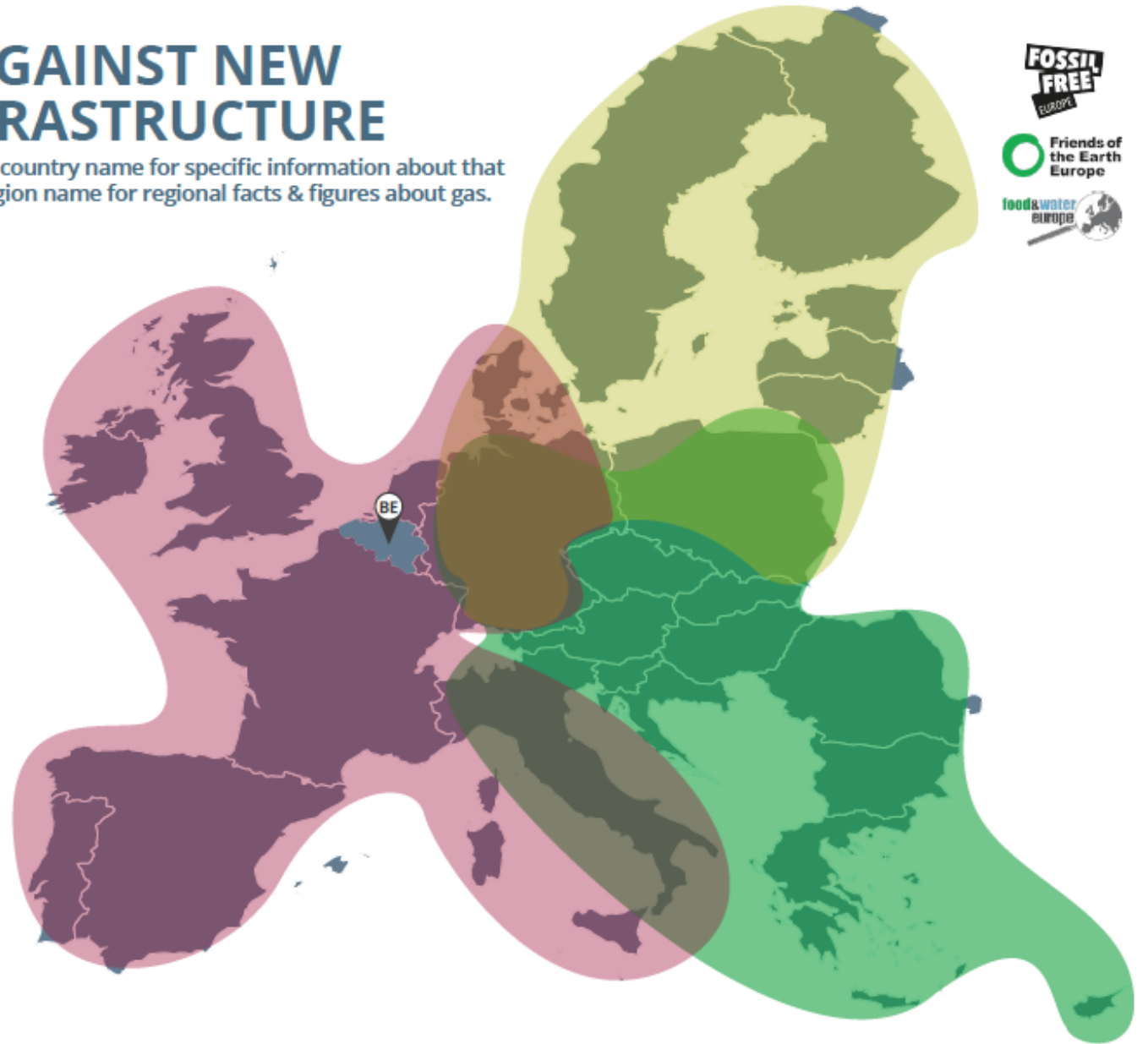
GENERAL INTRODUCTION
MORE ABOUT THE PCI LIST

REGIONS

NSI WEST
NSI EAST/SGC
BEMIP

COUNTRIES

AUSTRIA	- AT
BELGIUM	- BE
BULGARIA	- BG
CROATIA	- HR
CYPRUS	- CY
CZECH REPUBLIC	- CZ
DENMARK	- DK
ESTONIA	- EE
FINLAND	- FI
FRANCE	- FR
GERMANY	- DE
GREECE	- GR
HUNGARY	- HU
IRELAND	- IE
ITALY	- IT
LATVIA	- LV
LITHUANIA	- LT
LUXEMBOURG	- LU
MALTA	- MT
THE NETHERLANDS	- NL
POLAND	- PL
PORTUGAL	- PT
ROMANIA	- RO
SLOVAKIA	- SK
SLOVENIA	- SI
SPAIN	- ES
SWEDEN	- SE
UNITED KINGDOM	- UK



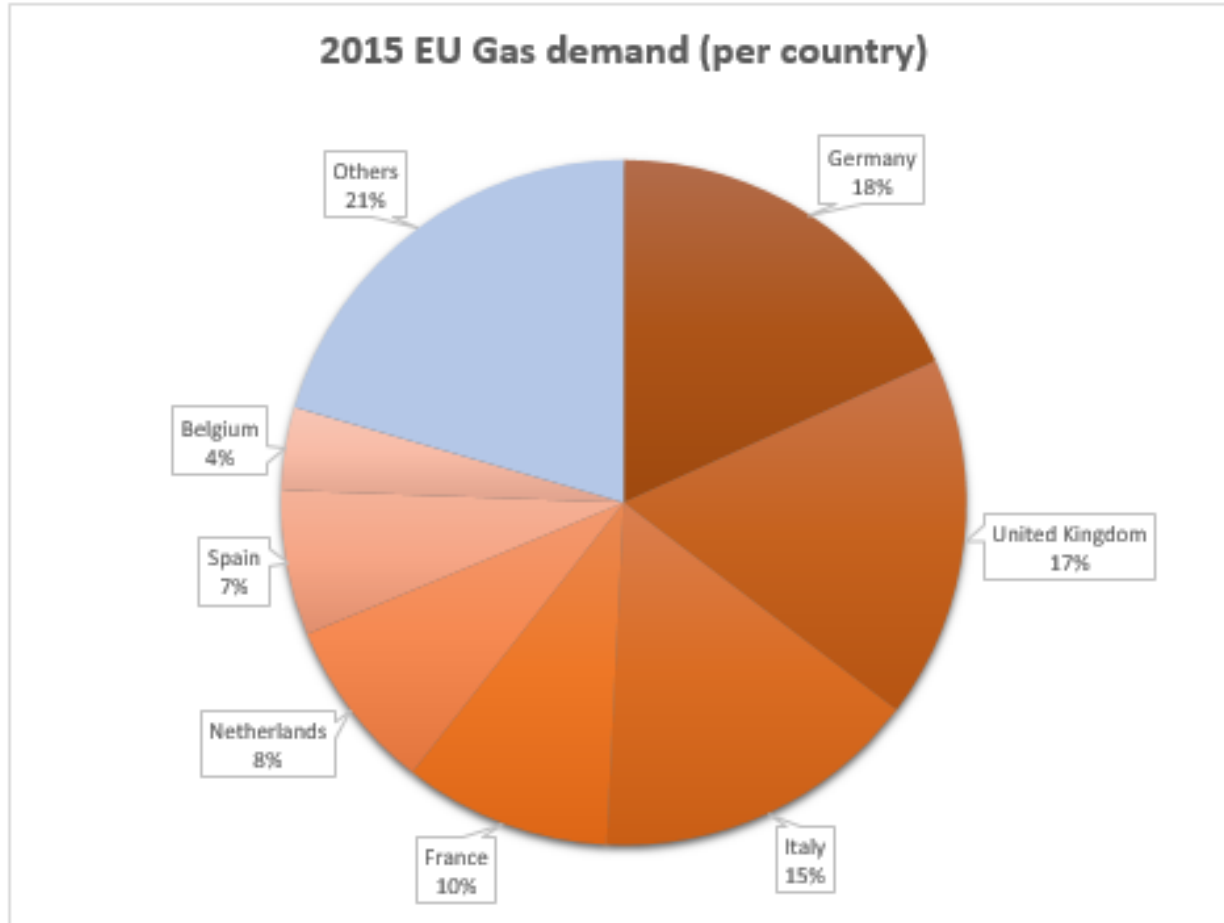
**FOSSIL
FREE
EUROPE**

**Friends of
the Earth
Europe**

**food&water
europe**

Access to Gas Mapping: http://bit.ly/FoEE_FWE_GasMapping

GAS IN EUROPE – GAS DEMAND

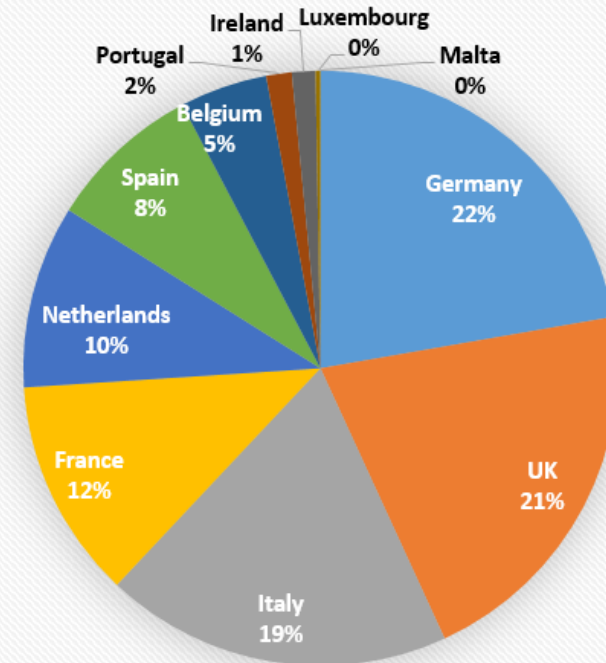


- 7 biggest EU gas consumers = 80% total EU gas demand
 - 2010-2015 gas demand decrease of 7 biggest EU consumers: 90 bcm
- = total consumption of the 21 other Member States
- represents total gas phase out of 21 EU countries

NSI WEST CORRIDOR

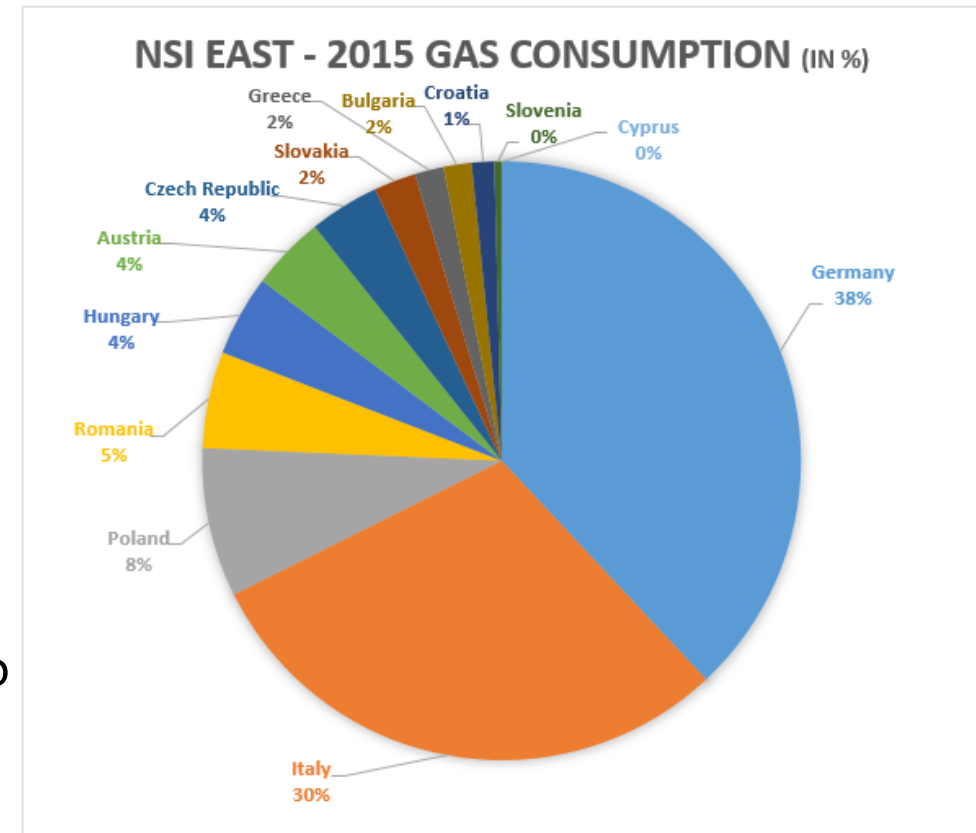
- Contains all of Europe's biggest gas consumers (Germany, UK, Italy, ...)
- 2015: 82% of total EU-28 gas demand consumed in West
- Except NL (~133% of domestic demand) and UK (~58%) almost no domestic gas production
- High LNG import capacities (Spain, UK, France, ...)

NSI West - 2015 Gas Consumption (in %)



NSI East gas corridor & Baltic States

- Biggest consumers (Germany & Italy) consume 70% of total corridor demand
- remaining 11 countries represent only 15% of total EU consumption (67 bcm)
- Drop of ~15% between 2010 & 2015
- Baltic States
 - Dependence on Russia
 - Agreement on regional LNG terminal?



CONCLUSIONS



- Europe does not need more gas infrastructure
- Pipelines & import terminals are operated for decades and lock us into gas dependence
- Urgent need to phase out gas along with other fossil fuels
- Gas is not a bridge fuel
- Rapid, fair transition to renewables and a boost for energy efficiency