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Gas Strategies Group

10 Saint Bride Street
London UK
EC4A 4AD

ISSN: 0964-8496

T: +44(0) 20 7332 9900
W: www.gasstrategies.com
Twitter @GSInfoServices



Editorials

+44(0) 20 7332 9957
editor@gasstrategies.com

Subscriptions

+44(0) 20 7332 9976
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Beyond Energiewende – An existential challenge for the German gas industry

THE HEATING SECTOR IS THE CORE MARKET FOR GAS DEMAND IN GERMANY. UNTIL 2015, THIS SECTOR WAS ALMOST UNTOUCHED BY 'ENERGIEWENDE' CONCEPTS – THE ANTI-NUCLEAR INSPIRED TRANSITION TO CLEANER (PRIMARILY RENEWABLE) ENERGY. BUT IN NOVEMBER 2016, THE GERMAN GOVERNMENT FINALLY PRESENTED ITS CONTROVERSIAL CLIMATE PROTECTION PLAN 2050, WHICH SETS OUT A PATH TO A DECARBONISED WORLD. ALTHOUGH PROPOSALS, INCLUDING A BAN ON FOSSIL-FUELLED HEATING APPLIANCES FROM 2030, WERE ERASED, THE MAIN ROUTE IN MIND IS A MARKET DOMINATED BY ELECTRIC HEAT PUMPS. POWER TO GAS (PTG) IS ONLY MENTIONED AS A KIND OF FALL-BACK POSITION. THE GAS INDUSTRY HAS INTENSIFIED LOBBYING, ARGUING THAT GAS IS A LOW-HANGING CARBON-REDUCTION FRUIT IN THE SHORT TERM, AND CAN LATER (AFTER 2030) BE REPLACED BY "GREEN GAS" FROM PTG OR BIOMETHANE PLANTS. GAS MATTERS EXAMINES THESE DEVELOPMENTS AND EXPLORES THE FEASIBILITY OF THE DIFFERENT PATHS, TAKING INTO ACCOUNT POLITICS AND ECONOMICS.

**Consulting**

+44 (0) 20 7332 9900
consult@gasstrategies.com

**Alphatania Training**

+44 (0) 20 7332 9910
training@gasstrategies.com

**Information Services**

+44 (0) 20 7332 9976
subscriptions@gasstrategies.com