

°CICERO

# EUROPEAN RENEWABLE ENERGY POLICY

EU and national policy developments

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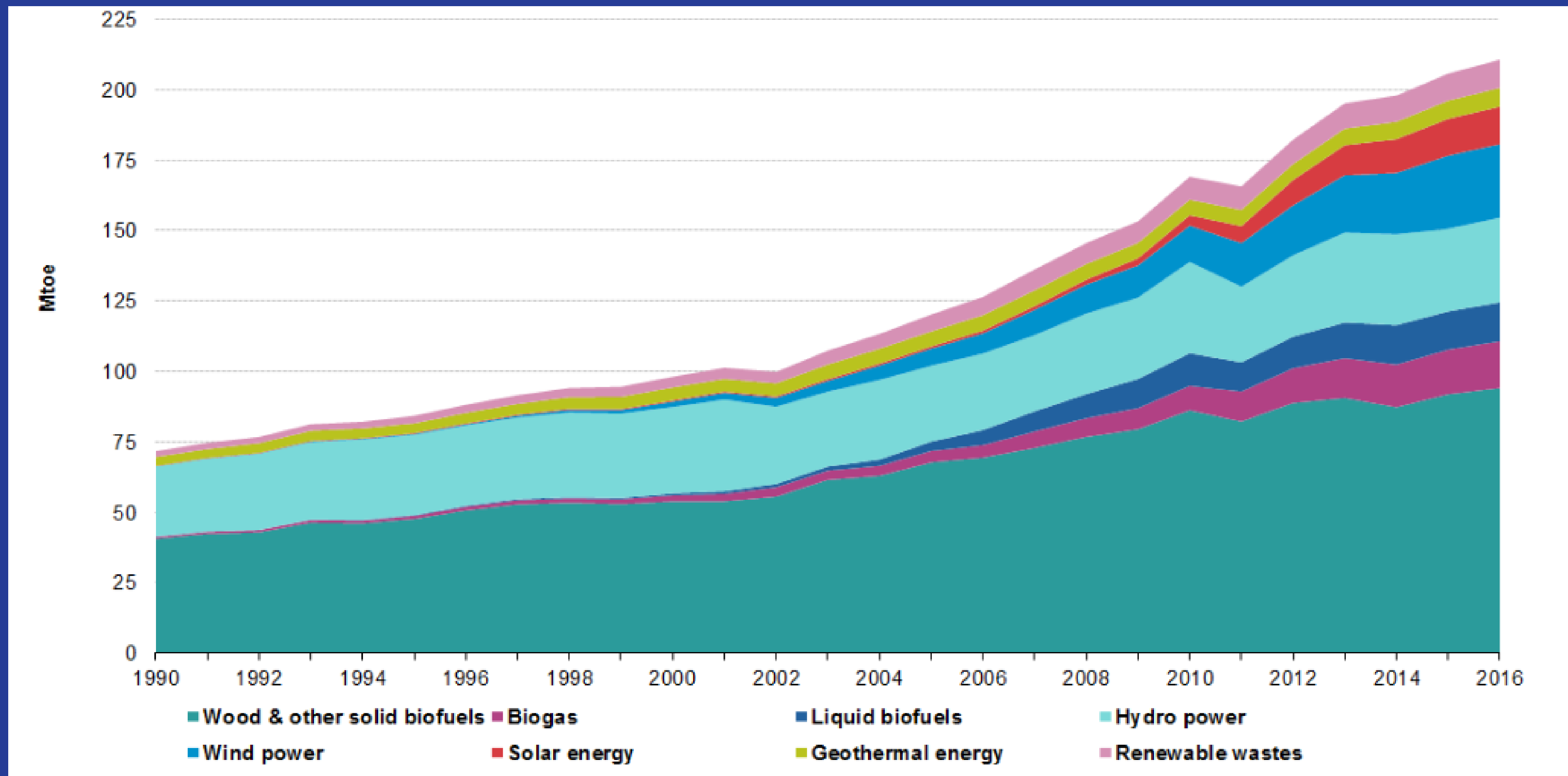
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# Key questions

- What characterizes EU renewables energy policy?
  - How has it developed over time?
- What characterizes the renewables support schemes in six EU and EEA-countries?
  - How and to what extent are they influenced by the EU?
- What may the future bring?

# EU RENEWABLES POLICY

# Renewable production in the EU





# 4 phases in EU policy development

1990 – 2000



2000 – 2010



2010 – 2015



2015 – 2020 ?





# Renewables policy

1990ies

3 member state approaches emerges

2001

First directive – market streamlining dies  
and feed-in tariffs diffuses

2007-9

Binding targets, Parliament and Council  
rejects pan European scheme

2014

No binding targets after 2020

2016

Revision of directive

# EU state aid rules

1990ies

First schemes notified to DG COMP

2001

Renewables included in guidelines  
PreussenElektra

2008

Revised state aid guidelines –  
mirrors inconsistent court practice

2014

New guidelines for energy, with  
detailed requirements promoting  
market streamlining

# EU renewables policy consists of

**Renewable energy  
directive**  
2001, 2009, 2018 (?)

**State aid  
guidelines**  
2001, 2008, 2014,  
2020 (?)

**Energy  
Performance of  
Buildings Directive**  
2002, 2010, 2012,  
og 2018 (?)

**Governance  
regulations**  
Birth (?) 2018

# Different policy developmen procedures

## One directive: Renewables

- 'Recast' during 2018

## One regulation: governance

- Adoption during 2018

## EU treaty + Court cases + Commission interpretation: State aid guidelines

- 2014 guidelines applies
- New guidelines in 2020 (?)





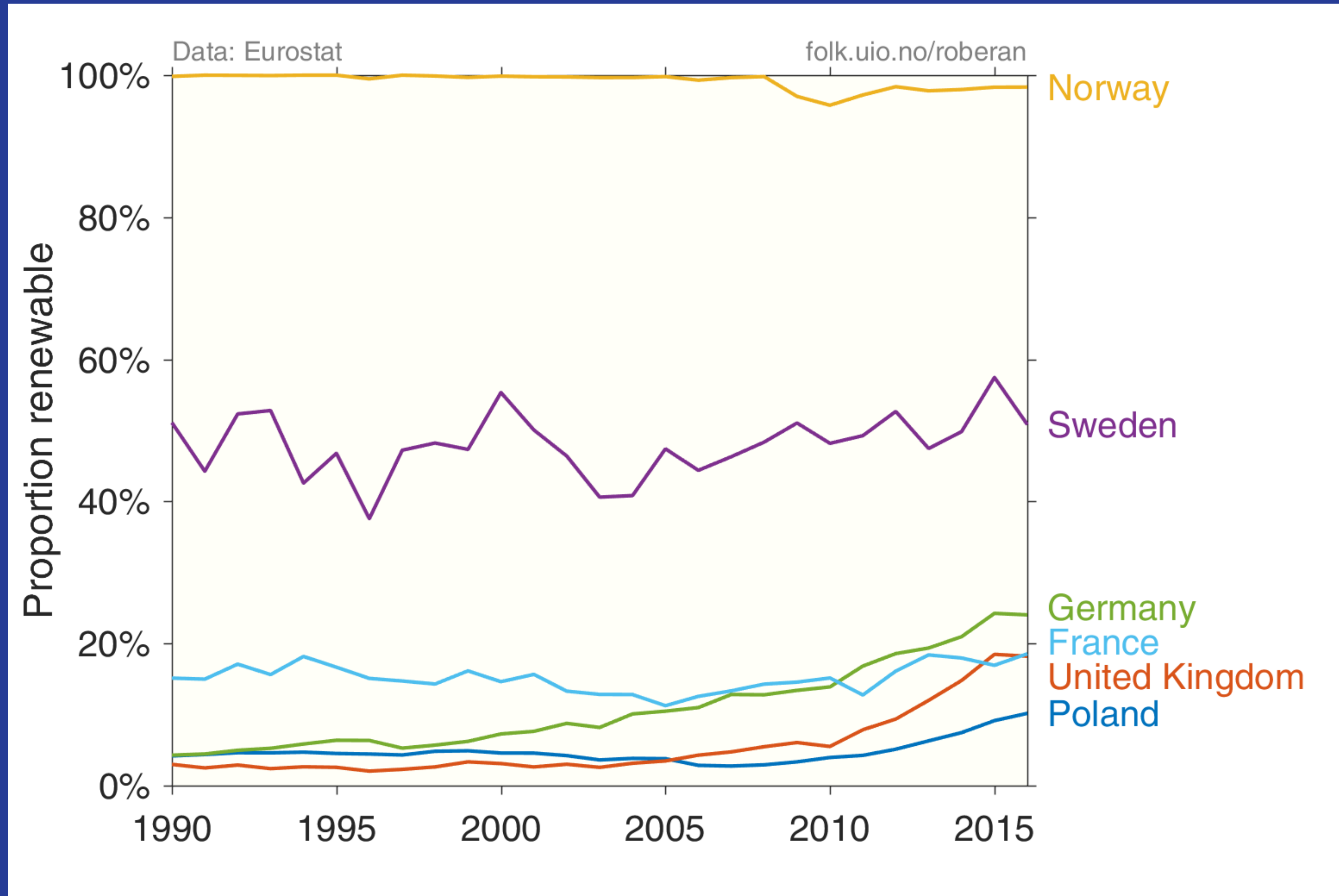
# Where will the EU go?

- **Renewables directive**
  - Will the target become higher than 27%?
  - Flexible mechanisms continues
  - Border crossing support schemes
  - Challenging the state aid guidelines?
- **Governance regulation**
  - Countries required to develop many detailed sub-targets
  - How much authority will be granted to the Commission?
- **State aid guidelines**
  - Auctioning + feed- in premium or certificates
  - Rather open for technology specificity
  - Many exceptions for small scale developments
  - New rules in 2020?

From setting national targets to regulating national support schemes

# NATIONAL RENEWABLES POLICIES IN EU AND EEA

# Renewables shares of production in REMIX countries





Technology  
**specific** market  
exposure



# Technology **neutral** market exposure





# EU-Influence thus far?

- Early importer of Brussels ideas
  - SWEDEN, NORWAY
- Resisted EU influence as long as possible
  - GERMANY
- Shallow EU importer
  - POLAND
- 'Copied' other EU member states
  - FRANCE
- Model for EU-steering
  - UK



**HOW WILL  
OUTCOMES OF  
NEW EU POLICY  
MAKING  
INFLUENCE EU  
AND EEA  
COUNTRIES?**





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