

Webinar organised by Eletticità Futura

Energy Transition in Italy and Europe: what are the effects of COVID-19?

Discussing with key European Associations in the Power Sector



Online, 28th April 2020

Moderator:



Nigel Hawkins, Head of European Affairs and Studies Eletttricità Futura

Speakers:



Alessio Cipullo
European Affairs and
Studies

Eletttricità Futura



Giulia Cancian
Policy Director

Bioenergy Europe



Gilda Amorosi
Senior Advisor
Sustainability

Eurelectric



Raffaele Rossi
Policy Analyst

SolarPower Europe

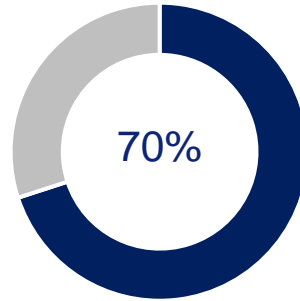


Diletta Zeni,
Advisor Energy &
Climate Change

WindEurope

Elettricità Futura is the Italian leading association representing the national electricity industry. It encompasses electrical energy generators involved in RES as well as traditional sources, distributors, traders, retailers and service providers. It represents and stands up for its members interests in Italy and Europe, contributing to making today's electricity market more efficient, enhancing the sector and exploiting the potential of the energy transition.

Elettricità Futura in figures:



of the **electricity consumed in Italy** is covered by companies that are part of Elettricità Futura

600
OPERATORS

40,000
WORKERS

75,000 MW
INSTALLED CAPACITY

1,150,000 km
ELECTRICITY LINES

We are member of:



 **Introduction**

 **Setting the Scene:**
Energy Transition and COVID-19 impacts in Italy

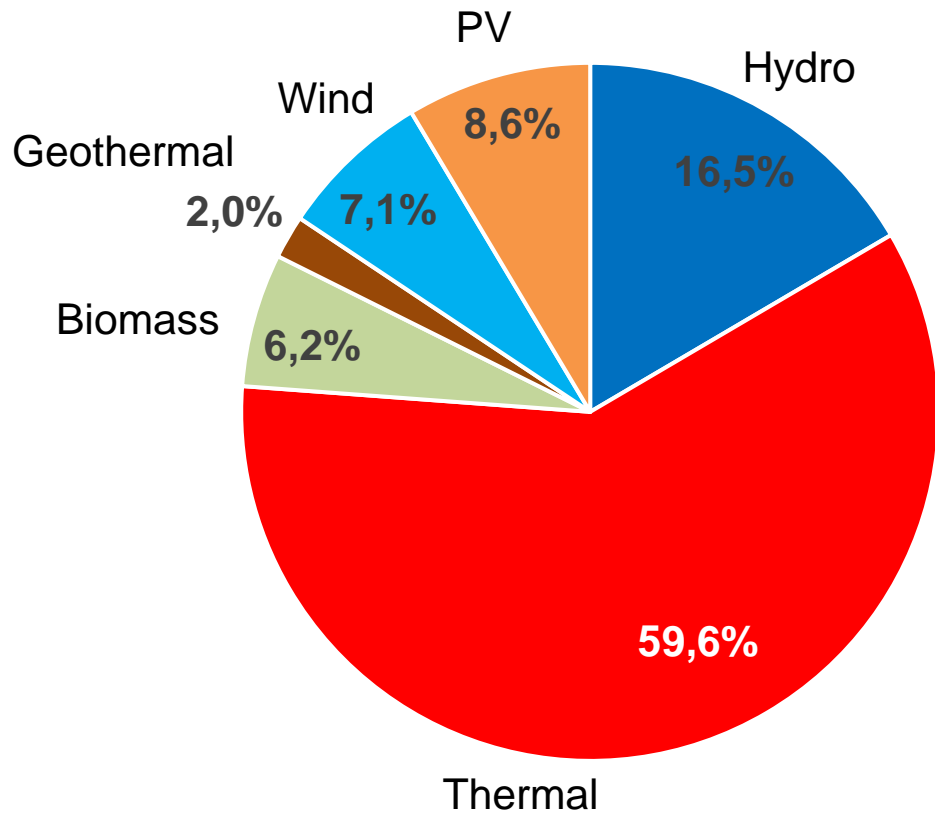
 **Panel Discussion**

 **Questions and Answers**





BREAKDOWN OF NET ELECTRICITY PRODUCTION BY SOURCE (2019)



OVERALL NET ELECTRICAL ENERGY PRODUCTION IN ITALY (2019):



283,846 GWh (+1.4% vs 2018)

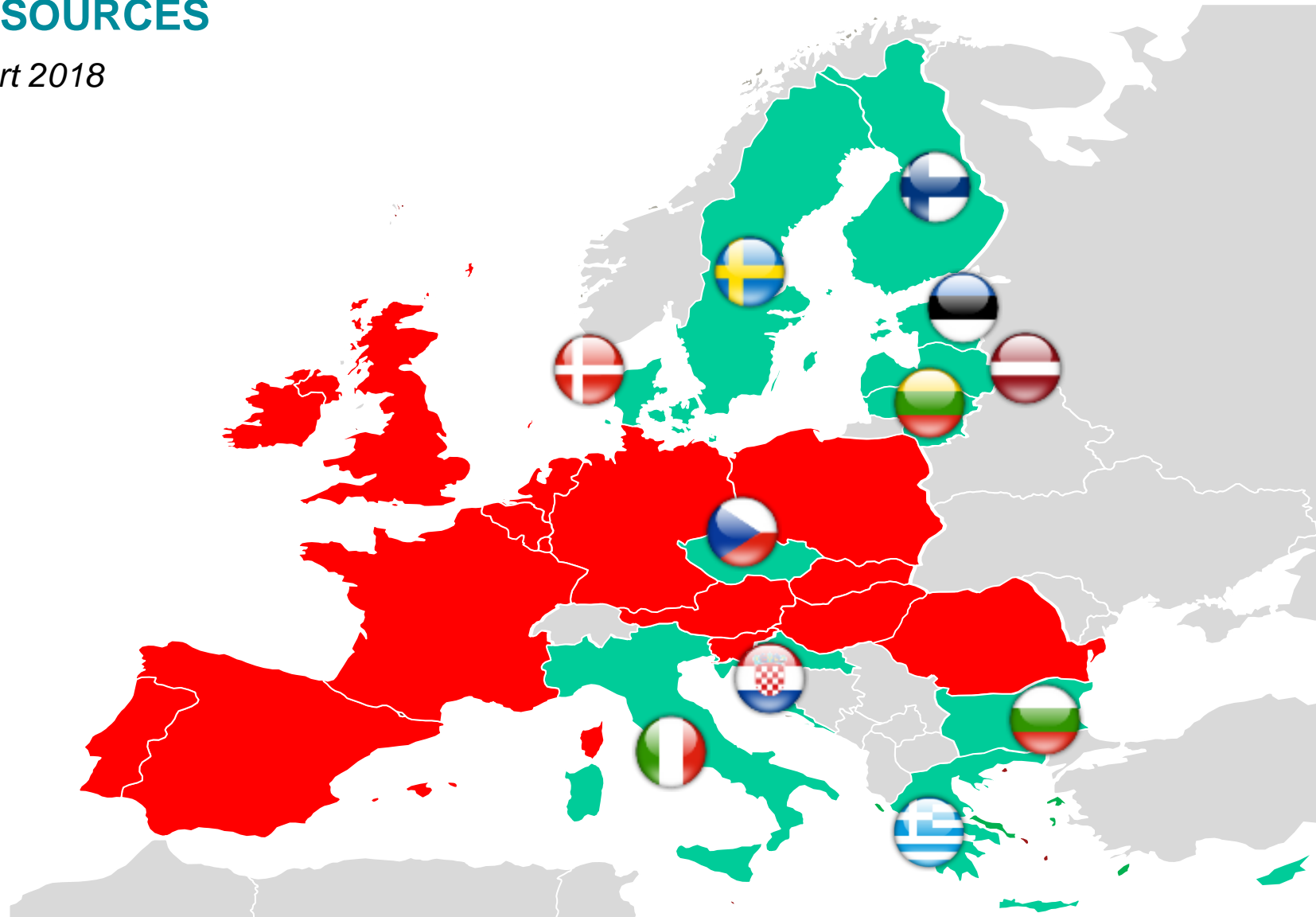
NET ELECTRICAL ENERGY PRODUCTION BY RES (2019):

114,581 GWh (40.4% of total)

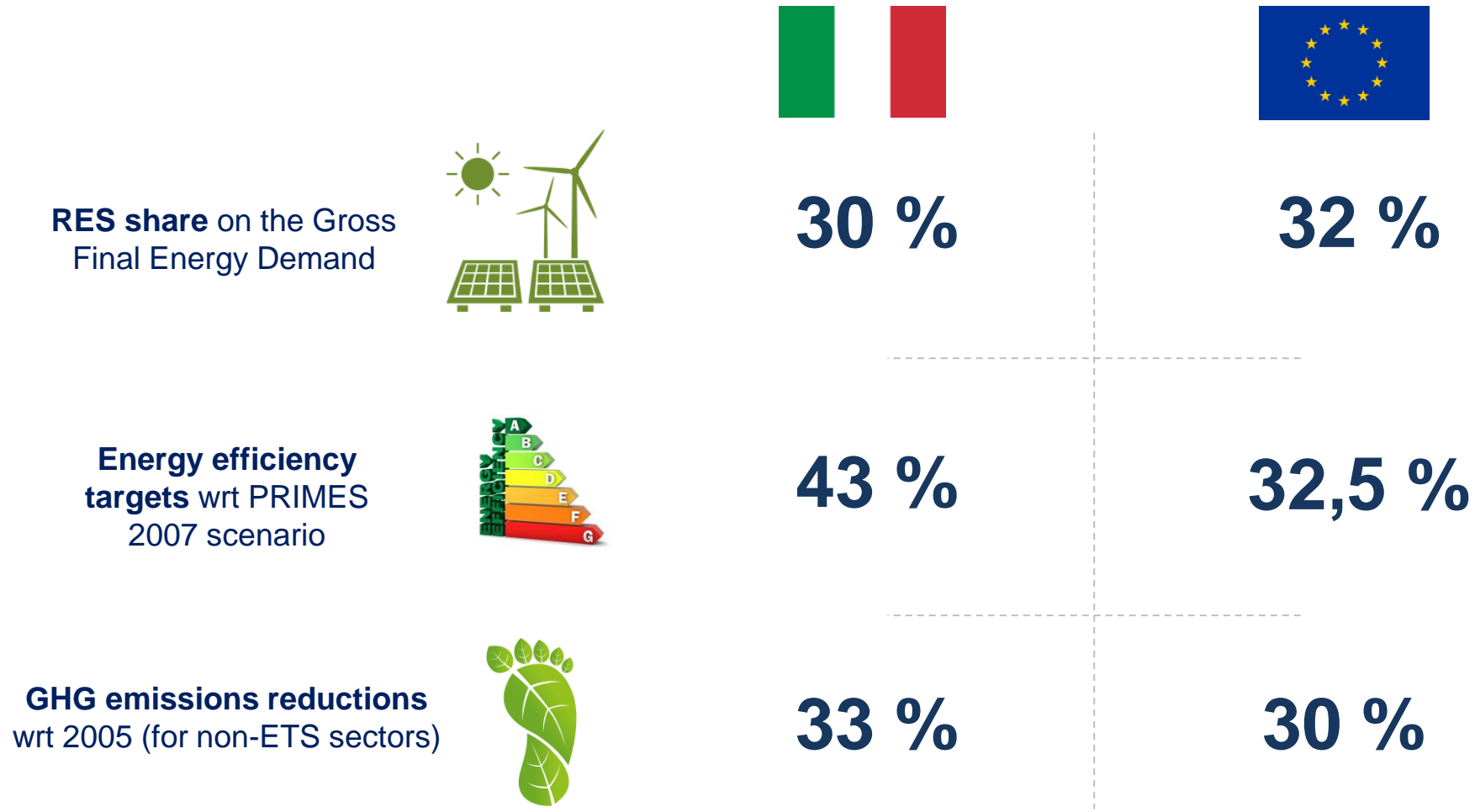
RENEWABLE ENERGY SOURCES

2020 Target – *State of the Art 2018*

-  Already reached the 2020 target
-  Not yet reached the 2020 target



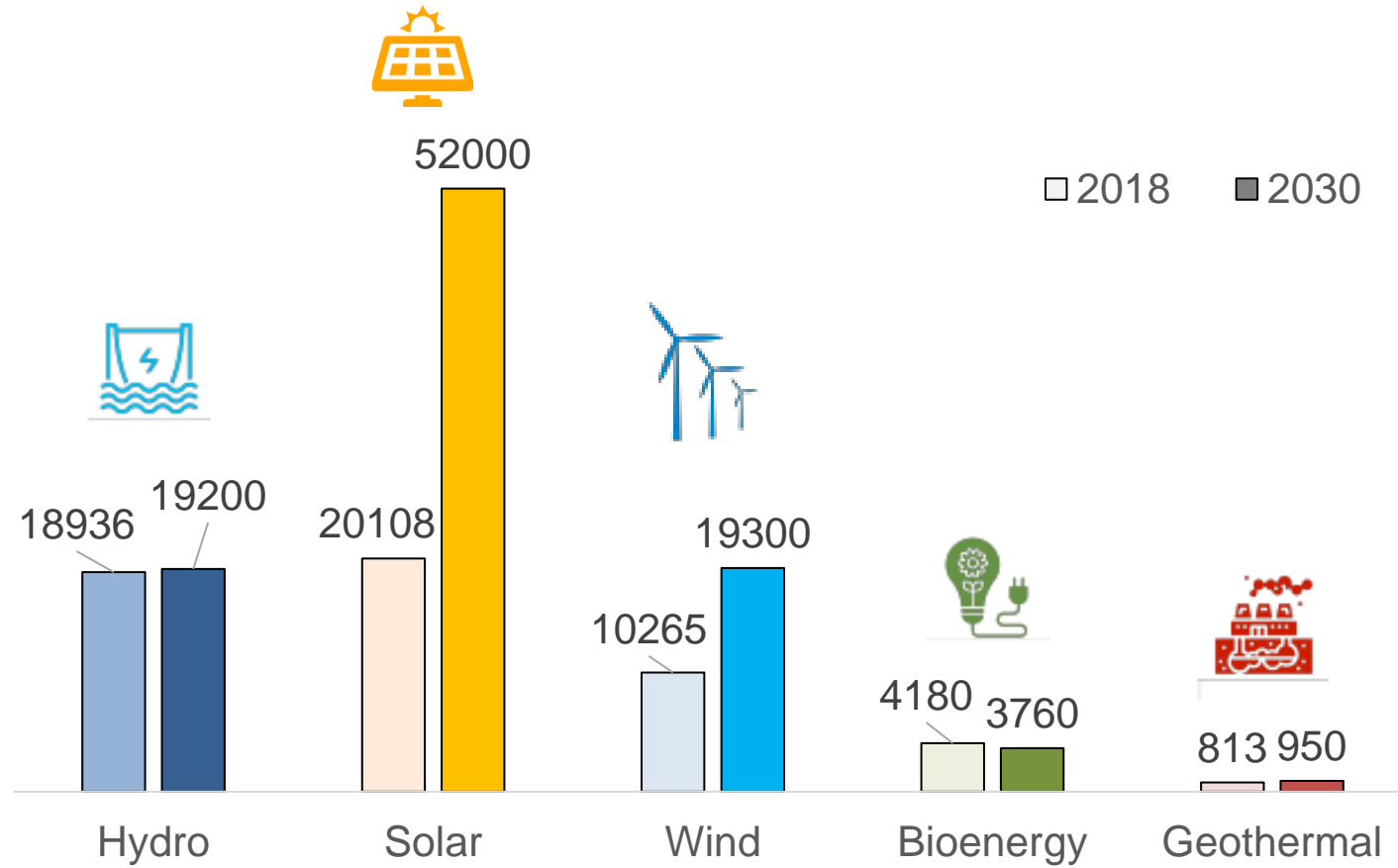
National Energy and Climate Plan 2030 objectives



Such targets are set to become even more ambitious with the **European Green Deal**

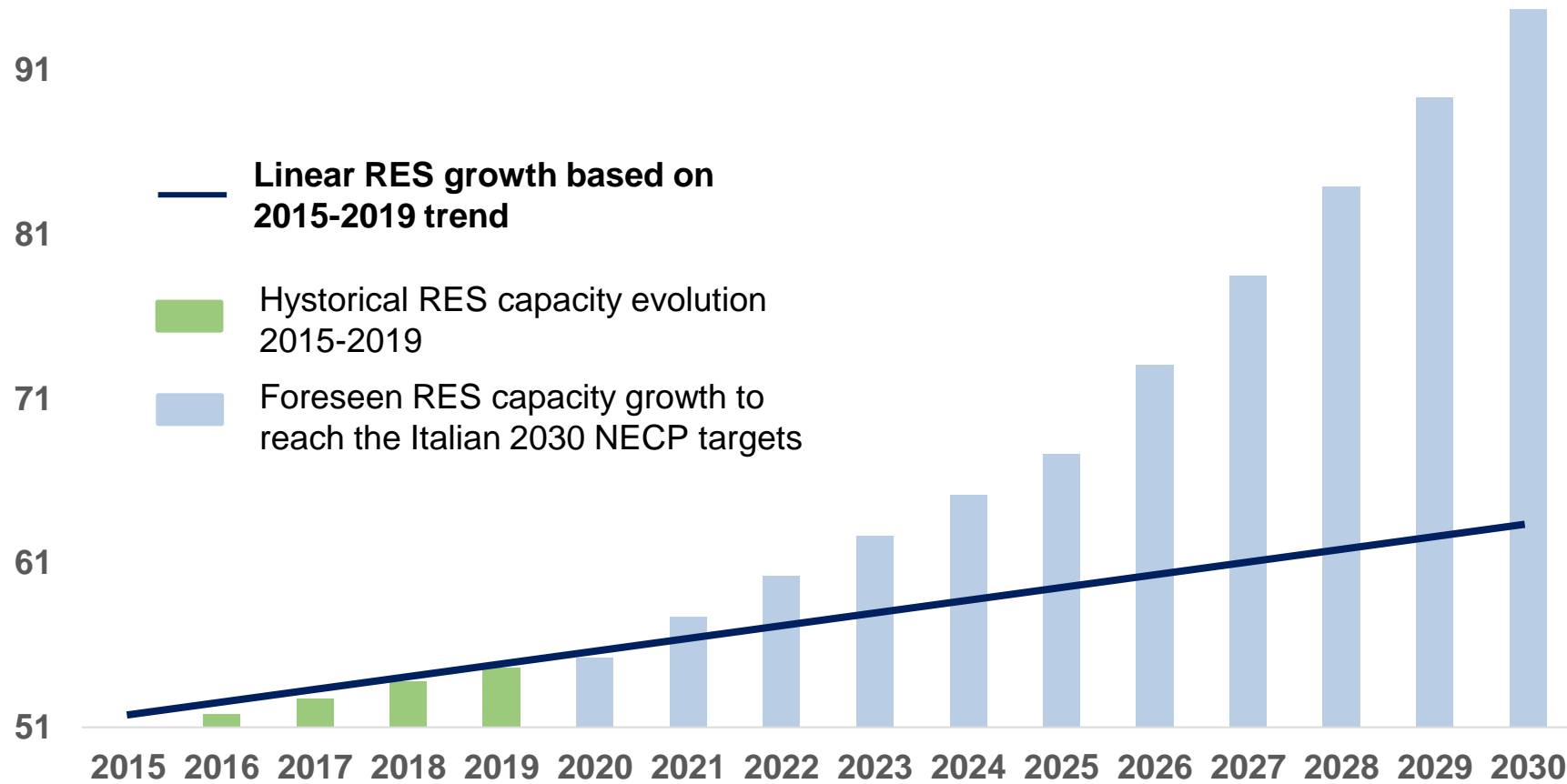
2030 objectives for RES Capacity

RENEWABLE CAPACITY IN ITALY 2018 VS 2030 [MW]



The Italian National Energy and Climate Plan (**NECP**) foresees an additional **41 GW** of RES capacity in 2030 (vs 2018)
Wind capacity will increase by over 90% and solar by over 160%

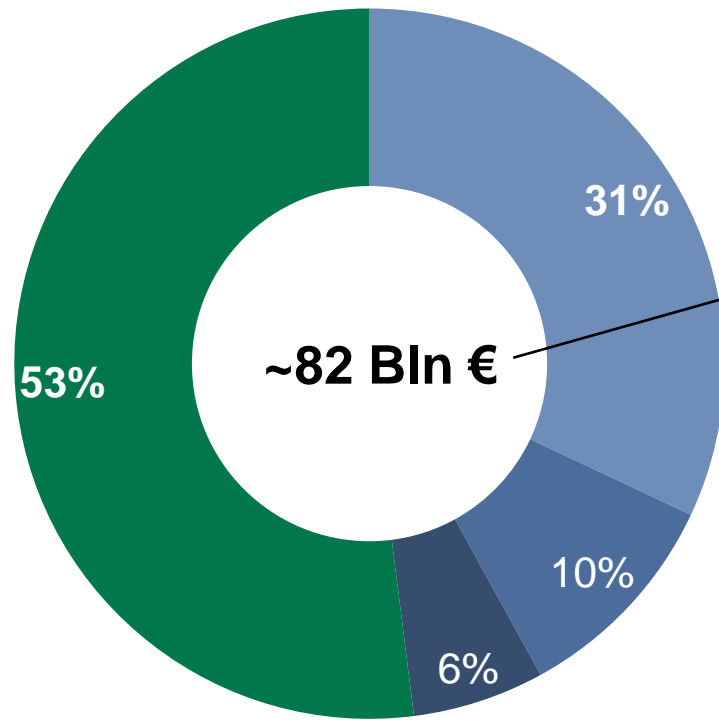
HYSTORICAL RENEWABLE CAPACITY EVOLUTION IN ITALY AND PERSPECTIVES [GW]



RES will play a major role in the energy transition, but current growth rate is too slow
Leveraging RES will be crucial for the economic recovery post-emergency, including
overcoming barriers such as burdensome permitting procedures

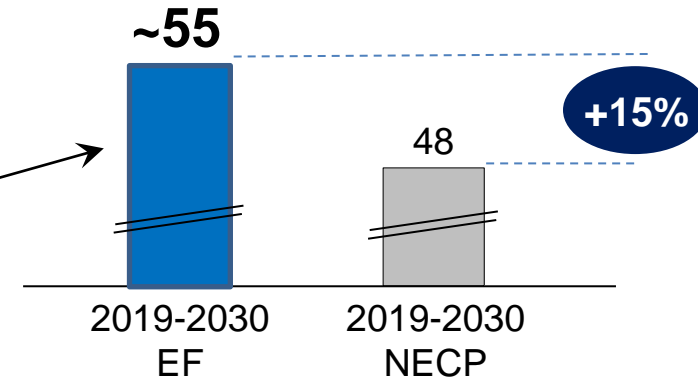
Investments needed for the energy transition in Italy according to EF

CUMULATIVE INVESTMENTS 2019-2030 ACCORDING TO EF [Bln €]



Of which, additional

[Bln €]

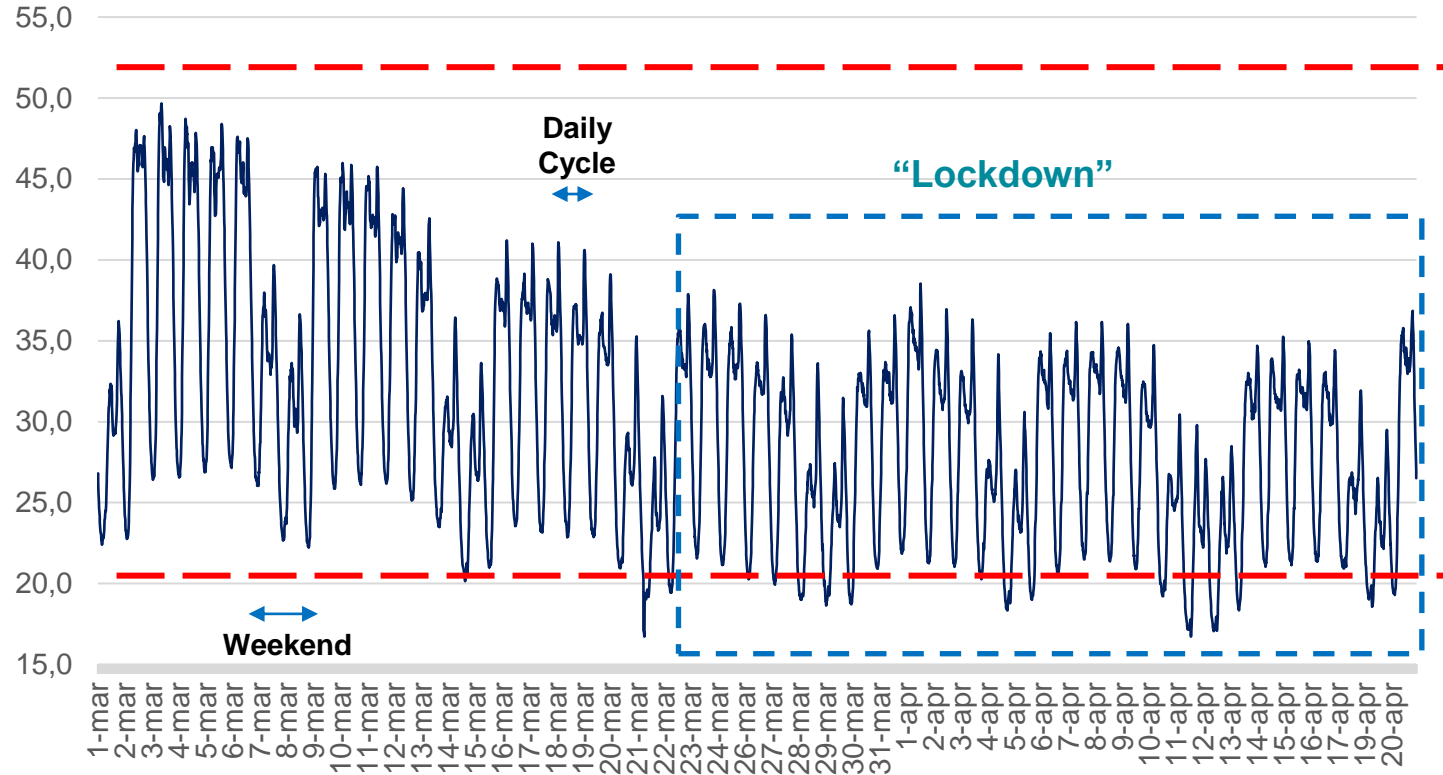


- Networks - baseline
- Storage (pumped and batteries)
- Networks - additional
- Generation - additional

Additional investments of about **55 Billion €** will be needed to achieve the Italian 2030 NECP targets, according to EF (an average of **4.7 Billion € / year**)
This would generate a total of **38,300** new permanent jobs in the electricity sector

Current impact of COVID-19 on the electricity load in Italy

TOTAL ELECTRICAL LOAD IN ITALY IN MARCH AND APRIL 2020 [GW]



**Total Demand
March 2020**

-10.2% vs 2019
(23.7 TWh)

**Total Demand since
start of «Lockdown»**

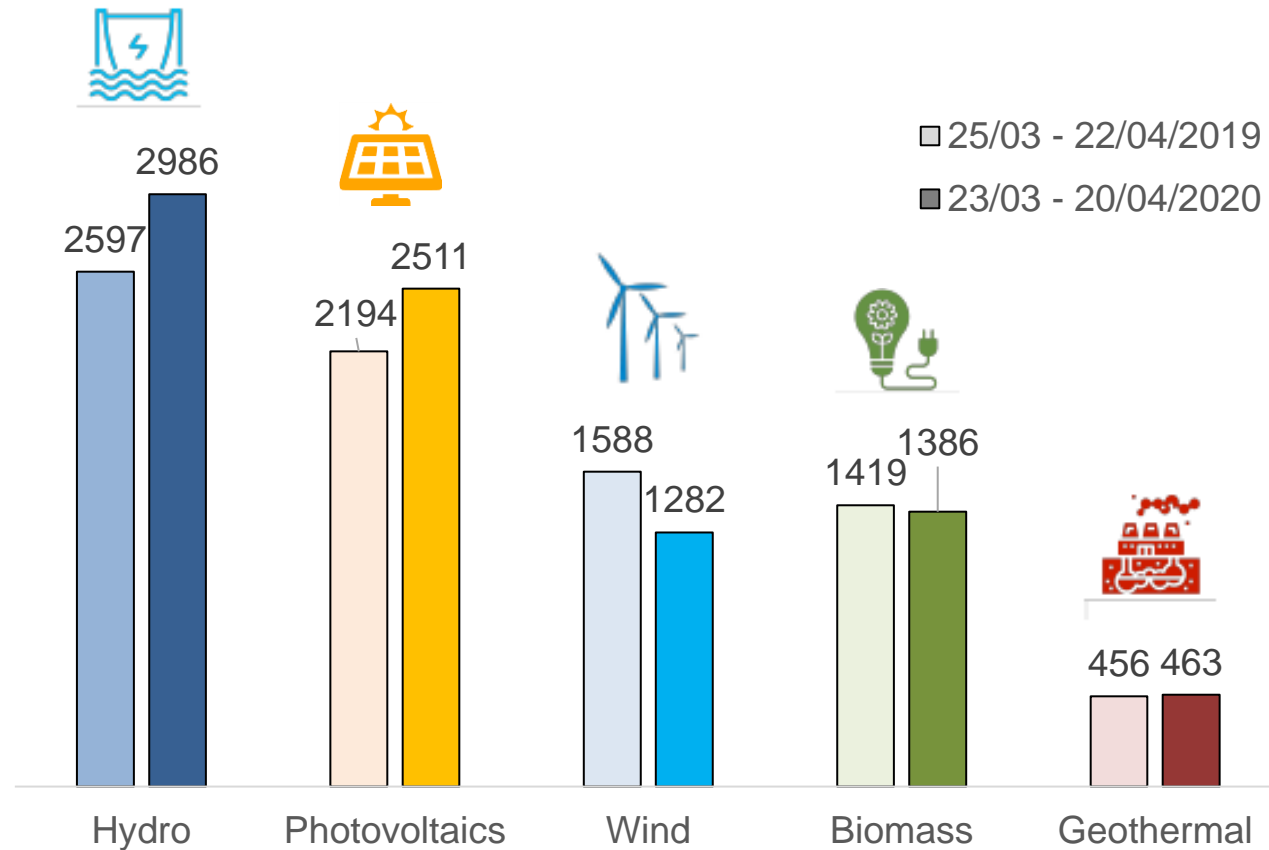
-20.7% vs 2019*
(19.1 TWh)

↑
Strict mobility limitations
introduced Italy-wide

↑
Closure of several commercial and
industrial activities

Sharp decrease in electricity demand is occurring, but the Italian power sector is showing **resilience** thanks to its **balanced mix (Thermal + RES), market structure and automation/digitalisation**

RENEWABLE GENERATION IN ITALY IN MARCH AND APRIL 2020 VS 2019 [GWh]



RES Generation since start of «Lockdown» 23/03/20

+4.5% vs 2019

Wholesale Electricity Price
March 2020
(Day-Ahead Market)

32.0 €/MWh
Lowest monthly level ever*

-18.5% vs Feb 2020
-39.5% vs Mar 2019

Despite **significant challenges** due to the **COVID-19 emergency** (e.g. weak demand, limitations in construction and O&M activities, market uncertainties), **operators are working to maximise the overall RES production**

- **Renewables** are key to the energy transition: electrical capacity is expected to almost double by 2030* according to the Italian **NECP** (with further target increases for the **European Green Deal**)
- The **COVID-19 emergency** is a global challenge, however the Italian power sector is showing its resilience and commitment to its high quality and security standards
- We call on all stakeholders to consider **Energy Transition** as a powerful tool for economic recovery post-emergency, to boost growth and job creation as well as to create a greener society for the “**New Normal**”

AGGIORNAMENTI DI ELETRICITÀ FUTURA IN TEMPO REALE SU COVID-19

Clicca qui



We are closely monitoring the evolution of the COVID-19 emergency in Italy and actively collaborating with the European Associations we are member of

<https://www.eletricitafutura.it/>



Nigel Hawkins
Head of European Affairs and Studies



nigel.hawkins@elettricitafutura.it



Alessio Cipullo
European Affairs and Studies



alessio.cipullo@elettricitafutura.it



Elettricità Futura
Rome - Piazza Alessandria, 24 - 00198
Milan - Via G.B. Pergolesi, 27 - 20124
T +39 06 8537281
www.elettricitafutura.it

Follow us on:

