



EU-OPEC Energy Dialogue 8th Ministerial Meeting



Progress report on the study on the potential of technological advances in the road transportation sector

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Background



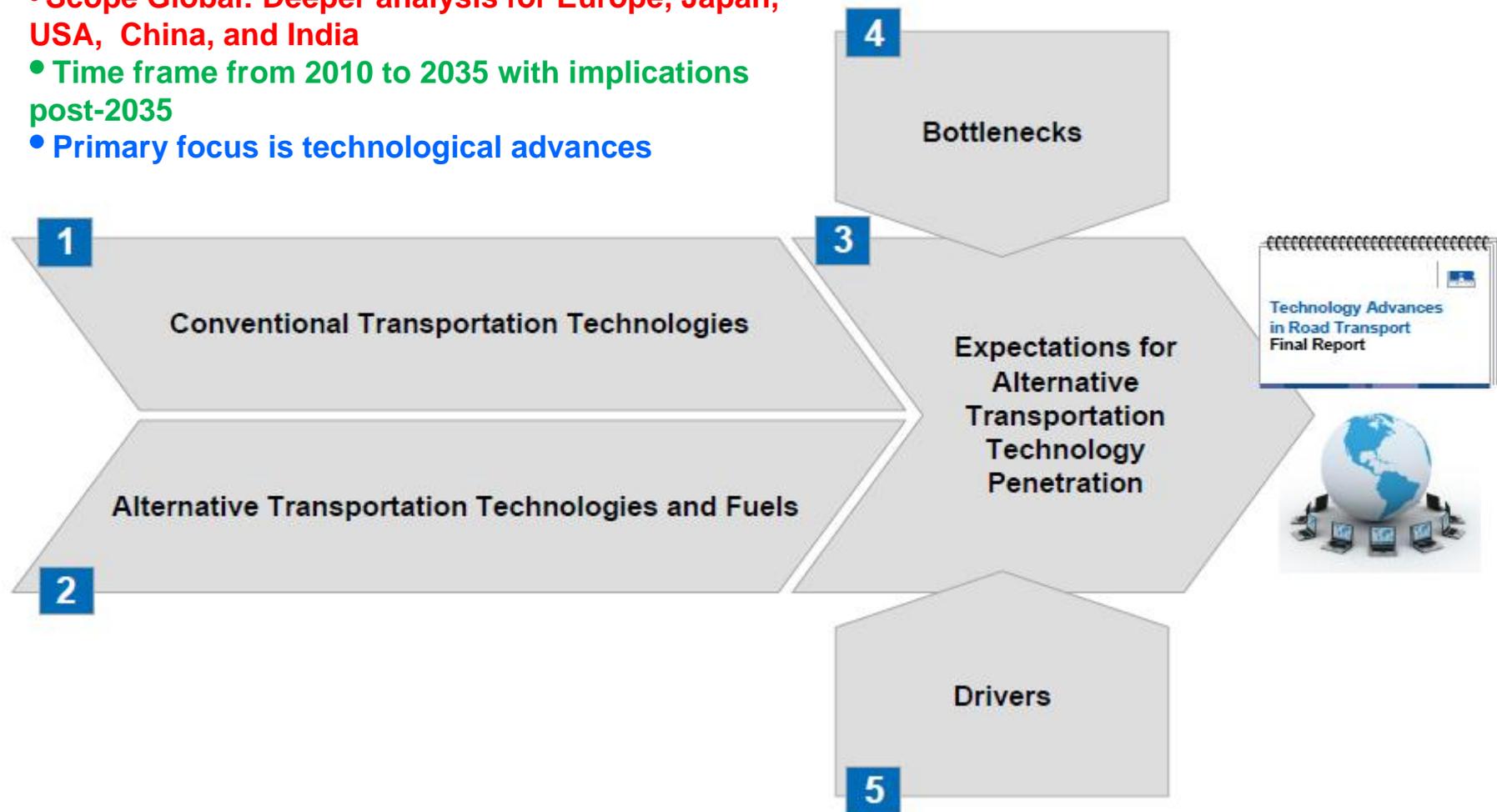
- **The transportation sector is a dominant contributor to incremental oil demand**
- **Technological developments aim at increasing the efficiency and introducing alternative power trains for vehicles**
- **This sector is a major source of uncertainty for future oil demand**
- **The study on this issue was agreed upon in the 7th Ministerial Meeting of the EU-OPEC Energy Dialogue**
- **The TOR of project was agreed upon among parties**
- **Project was outsourced in early 2011 using Ricardo consulting company**



Terms of Reference: Translated into 5 interlinked modules



- **Scope Global: Deeper analysis for Europe, Japan, USA, China, and India**
- **Time frame from 2010 to 2035 with implications post-2035**
- **Primary focus is technological advances**



Source: Derived from OPEC Terms of Reference



Delivered: three reports and teleconferences

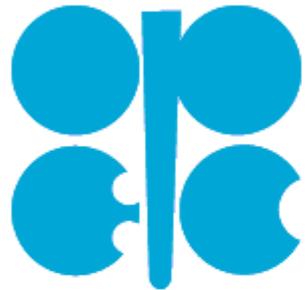


- **Report 1: Focus on passenger cars**
 - Technical efficiency improvement in power trains, etc.
 - Legislations, fuel economy/emission targets
 - HEV, PIV, incentives for advance technologies
 - Biofuels, LPG CNG, and hydrogen fuels
 - Penetration of technologies and fuels
- **Report 2: Focus on medium- and heavy-duty vehicles**
 - Technical efficiency improvement (power trains, aerodynamics, etc.)
 - Fuel economy and emission targets, incentives for hybrids,
 - Other measures for efficiency: intelligent transportation
 - Penetration of technologies into the market in three scenarios
- **Report 3: Biofuels and fuel consumption**
 - Biofuel technology mapping
 - Fuel consumption improvement



- **Final full descriptive report: Early July**

- **Workshop: Early next year**



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Thank you

