Renewables Grid Initiative

RGI Statement on the EU post-2030 energy framework

November 2026

Europe faces a convergence of geopolitical, economic and climate-related challenges. Continued dependence on imported fossil fuels exposes citizens and industry to price volatility, undermines competitiveness and weakens Europe's energy security. The recent geopolitical conflicts alone have added more than €100 billion to the Union's bill for the same amount of imported fossil fuels. This is reflected in the spiking energy prices across EU Member States, which in turn fuel social tensions.

The energy transition is not only a climate imperative[1] but also a strategic opportunity for Europe. Homegrown renewable energy, alongside electricity grids and flexibility can strengthen resilience, reduce exposure to external shocks and contribute to affordability in the long-term[2]. However, the challenge is increasingly one of implementation. The post-2030 energy framework, the revision of the Regulation on the Governance of the Energy Union and Climate Action (Governance Regulation), the European Grids Package, the Electrification Action Plan and the EU Action Plan for Grids should together provide a coherent framework for delivery.

A predictable policy and investment framework

RGI supports maintaining binding EU-level renewable energy and energy efficiency targets for 2040, aligned with the 2040 climate target and translated into national contributions through the Governance Regulation. The 2030 climate and energy framework has demonstrated that clear, binding targets and coordinated European action deliver results. Certainty depends on continuity. Maintaining the binding targets would provide long-term predictability to investors, renewable developers and electricity system operators, whose planning and investment cycles extend well beyond a decade. At a moment when the EU needs to accelerate, changing the structure of the target regime risks delaying investment decisions and further increasing costs.

A binding direct electrification target should complement the renewables and efficiency targets. RGI welcomes the recent European focus on direct electrification as a means to reduce primary energy needs, optimise and maximise system efficiency, de-risk investments in renewables and ensure energy security. With the technologies for direct electrification already mature, the financial case is well established: reaching a 46%

[1] Read the 2026 UN Environment Programme report, '*Limiting Overshoot*', here

[2] Read the 2026 European Environmental Agency report, '*Renewable electricity — best buffer against gas price volatility*', here

direct electrification rate by 2040 in the EU could cut the Union's fossil-fuel import bill by €260 billion per year[3].

Renewable energy, energy efficiency and direct electrification should operate as one mutually reinforcing architecture: the renewables target defines the volume of renewables onshore and offshore as well as the pace of their built-out; the efficiency target reduces overall energy demand; and the direct electrification target channels the demand towards the electricity system, when it is technically and economically efficient, contributing to decarbonisation, energy security and affordability, while helping to address the growing challenge of energy costs across Europe. Europe should combine this ambition with a binding timeline for the phase-out of fossil fuel and related subsidies, so that price signals do not continue to favour technologies that the post-2030 framework intends to displace.

Electricity grids as the enablers of the energy transition

System preparedness should underpin this architecture. A renewables-based, highly electrified energy system will require robust electricity grid infrastructure within and between Member States. This relies on the pace, trajectories and implementation of all three targets (renewables, energy efficiency and direct electrification). With long lead times, electricity grids should be developed at the same pace as renewables, demand and flexibility. Treating them as core elements of planning and providing effective regulatory tools at European and national levels would allow to anticipate future needs, rather than react to them. To make this possible, the post-2030 energy framework should, among others, support anticipatory electricity grid investments based on credible future demand and generation scenarios, with clear regulatory mechanisms for the associated investment risks and costs. Long-term electricity grid planning should also integrate climate risk assessments and adaptation measures, as reflected in the new EU Framework for Climate Resilience[4], to ensure that new and existing grid infrastructure can withstand the growing impacts of extreme weather events, while respecting environmental safeguards and local contexts[5].

National Energy and Climate Plans (NECPs) are the instruments through which electricity grid and system planning receive the data they require. Indeed, NECPs are often used as the primary data source for the Ten-Year Network Development Plan (TYNDP) scenarios as well as for national network development plans (NDPs). The robustness of these scenarios and plans as well as the facileness of their preparation and development can be very much determined by the quality and availability of the underlying data. As of today, NECPs vary in format, granularity and timeliness across Member States. The revision of the Governance Regulation should address these

[3] EU Electrification Action Plan, COM(2026) 595 final

[4] Read more about the new EU Framework for Climate Resilience here

[5] Read RGI's Statement '*Adapting European electricity grids to changing climate*' here

shortcomings: data should be harmonised and ideally shared through common templates, that are structured around all relevant sectors, and reflect sectoral contributions of different energy carriers and spatial details required for electricity grid and system modelling and planning. Crucially, electrification, flexibility as well as both onshore and offshore renewables development should be covered.

NECPs should align with spatial planning processes. They should be developed in close coordination with the mapping exercise under the revised RED, the designation of renewable and grid acceleration areas, maritime spatial planning for offshore developments and Nature Restoration Plans. This would help ensure that energy targets are spatially feasible and considered alongside environmental and socio-economic aspects. Moreover, it should be possible to transparently update the NECP data so that it can easily be applied and aligned within the TYNDP and NDP cycles, allowing grid planning to be based on the most up-to-date and available information and assumptions. Greater harmonisation of NDP structures could further support the alignment of planning cycles and strengthen consistency across planning processes.

A system with high shares of renewables will require increased system flexibility to balance supply and demand, and to ensure stability and resilience. The Flexibility Needs Assessments, envisaged in the Electricity Regulation, should be the tools to evaluate system needs, including long duration storage. As systems change, though, reliability becomes a shared responsibility: robust temporal and locational signals should be in place to incentivise system-friendly behaviour from all assets; grid connection frameworks should allow the assessment of projects on the system benefits they provide over their lifetime, alongside maturity; enhanced coordination between transmission and distribution system operators[6] should be enabled and incentivised to leverage the potential of distributed assets and flexibility across voltage levels.

Matching the pace of the energy transition

RGI strongly believes that targets provide predictability, but targets alone will not deliver the transition. Success depends on effective implementation, policy coherence and integration across technical, financial, environmental and social dimensions, stronger institutional capacity, coordination across governance levels and Member States, as well as stakeholder engagement that builds public trust. Transposition and implementation of existing EU legislation is lagging across Member States; the post-2030 framework should close this gap and couple it with targeted financial incentives, such as prioritising support for renewables-based direct electrification of industry, transport and buildings in future financial instruments.

[6] Read more about RGI's work on how enhanced coordination between TSOs and DSOs can improve planning and operations, as well as unlock the full potential of flexibility here

The same applies to electricity grids. Realising the scale of investment required[7] depends on Transmission System Operators maintaining financial viability, sustaining solid investment-grade credit ratings and raising capital at low cost. Among others, this requires predictable and forward-looking regulatory frameworks that support the recovery of efficiently incurred investment costs, fair and competitive returns, and adequate access to equity and risk-sharing instruments, while maintaining affordability for consumers. Strong EU funding, including through the InvestEU, European Investment Bank instruments, European Competitiveness Fund and Connecting Europe Facility for Energy (CEF-E), will help deliver this capacity and ease access to capital. Overall, this would allow to keep the energy transition on track, reduce fossil fuel import dependence and unlock homegrown, reliable and affordable renewable electricity.

About RGI

RGI is a unique collaboration of NGOs and TSOs (Transmission System Operators) from across Europe engaging in an 'energy transition ecosystem-of-actors'. We promote fair, transparent, sustainable grid development to enable the growth of renewables to achieve full decarbonisation in line with the Paris Agreement.

RGI Members originate from a variety of European countries, consisting of TSOs from Belgium (Elia), Croatia (HOPS), France (RTE), Germany (50Hertz, Amprion, TenneT and TransnetBW), Greece (IPTO), Ireland (EirGrid), Italy (Terna), the Netherlands (TenneT), Norway (Statnett), Portugal (REN), Spain (Red Eléctrica), Switzerland (Swissgrid), and UK (NESO); and the NGOs Bellona Europa, BIOM, BirdLife Europe, Climate Action Network (CAN) Europe, Ember, France Nature Environnement (FNE), Friends of the Earth Ireland, Fundación Renovables, Germanwatch, Legambiente, NABU, Natuur&Milieu, the Royal Society for the Protection of Birds (RSPB), WWF International and ZERO. Europacable, IUCN and T&D are Supporting Members.

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[7] The European Commission estimates EUR 1.2 trillion of investments in electricity grids by 2040