

EU:n energiasiirtymä - tilannekatsaus

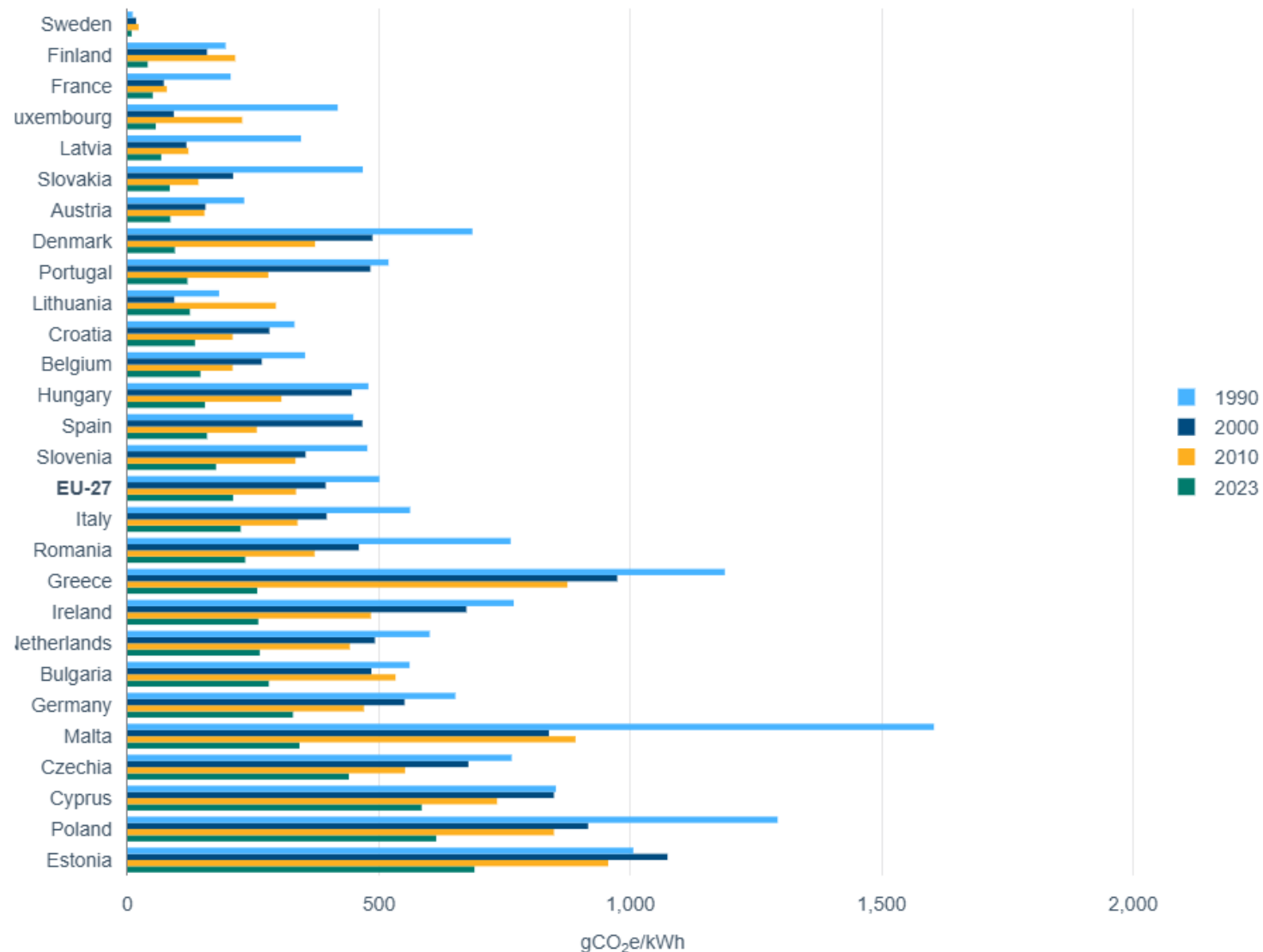
Eero Ailio, johdon neuvonantaja, DG
ENER

Global emissions by sector

		2024 vs 1990	2024 vs 2005	2024 vs 2023
	Power Industry	 +104%	 +41%	 +2%
	Industrial Combustion and Processes	 +93%	 +43%	 +1%
	Buildings	 -4%	 -2%	 +1%
	Transport	 +79%	 +27%	 +1%
	Fuel Exploitation	 +52%	 +26%	 +2%
	Agriculture	 +25%	 +17%	 0%
	Waste	 +46%	 +27%	 0%
	All sectors	 +65%	 +30%	 +1%

Global GHG emission trends by sector and key years

GHG emission intensity electricity generation (EEA 2025)

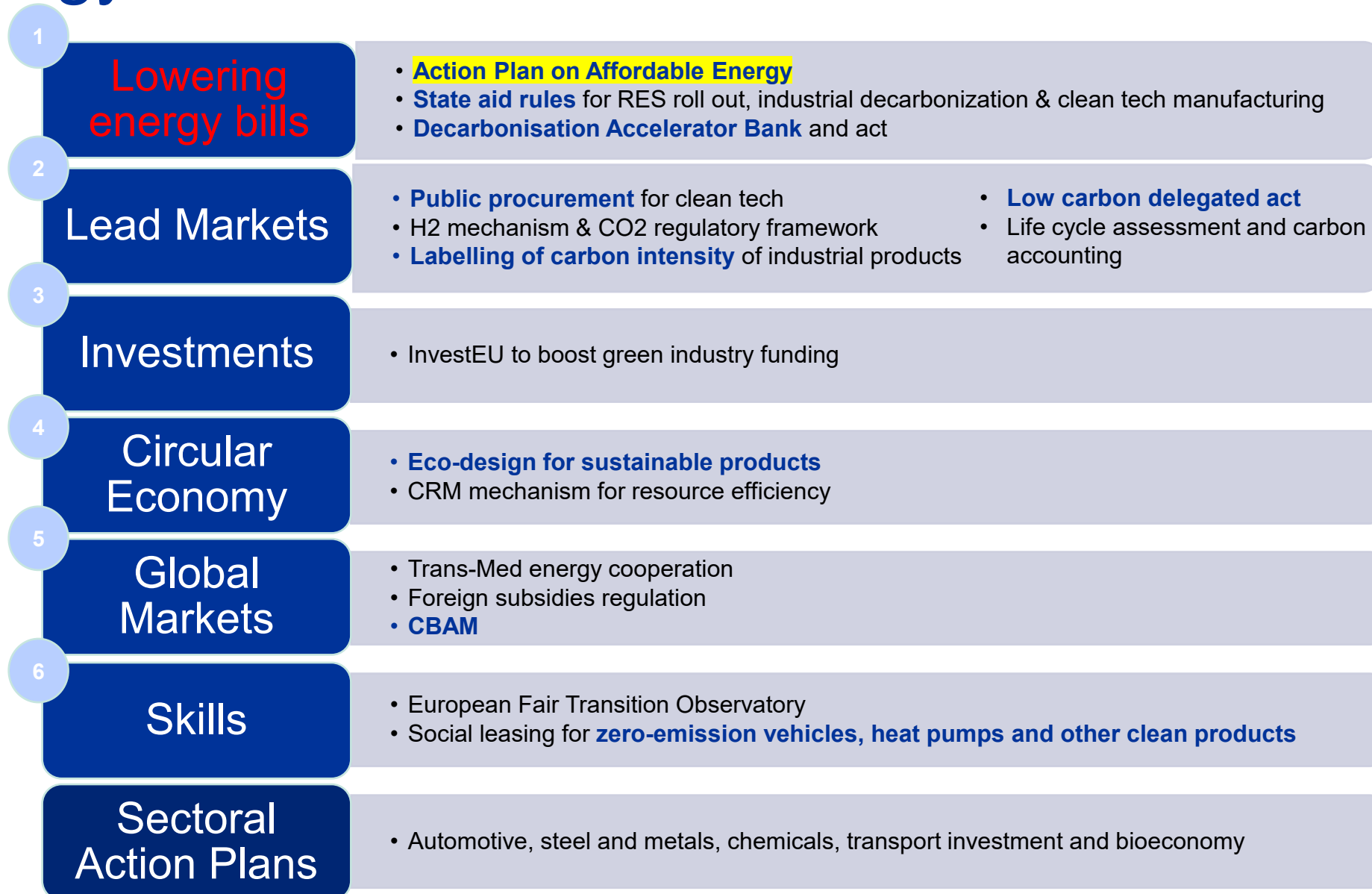


What is the Clean Industrial Deal?

- Response to strengthen **European industry's competitiveness**
- Clear commitment to the **2050 objective** of the EU becoming the first climate neutral continent.
- Industrial decarbonisation, circular business models and affordable energy in Europe as growth drivers.
- It focuses primarily on **energy-intensive industries** and the **circular** / **clean tech** sectors.



Energy in the Clean Industrial Deal



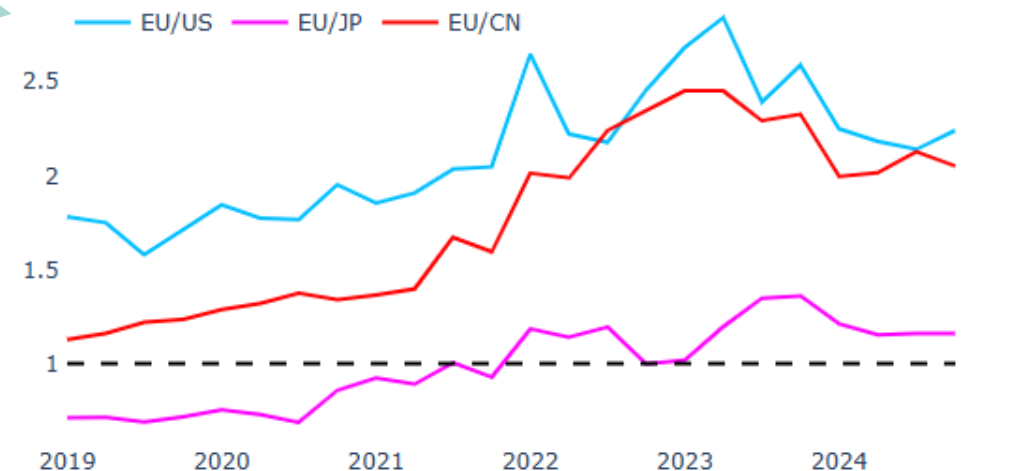
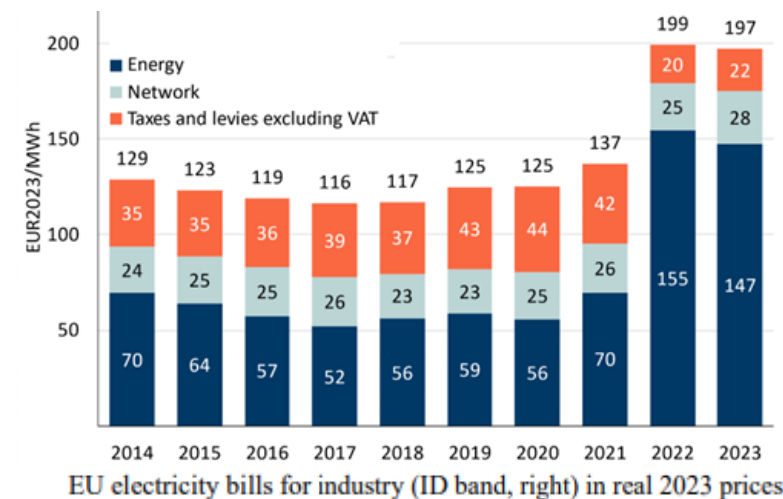
Where we are – energy sector at a cross-roads

Effects of high energy prices in Europe

- Retail electricity prices for **industry** have almost doubled
- **Energy poverty** affects more than **46 million** Europeans
- **Gap** in energy prices between **EU & competitors** is growing

What's driving up energy costs?

- **Reliance on fossil fuel imports** causing price volatility & high supply costs.
- Inefficiencies & **lack of electricity system integration**
- **Increasing system costs** covered by network charges & taxes and levies.



The Action Plan for Affordable Energy

4 Pillars, 8 Actions

Action 1: Making electricity bills more affordable

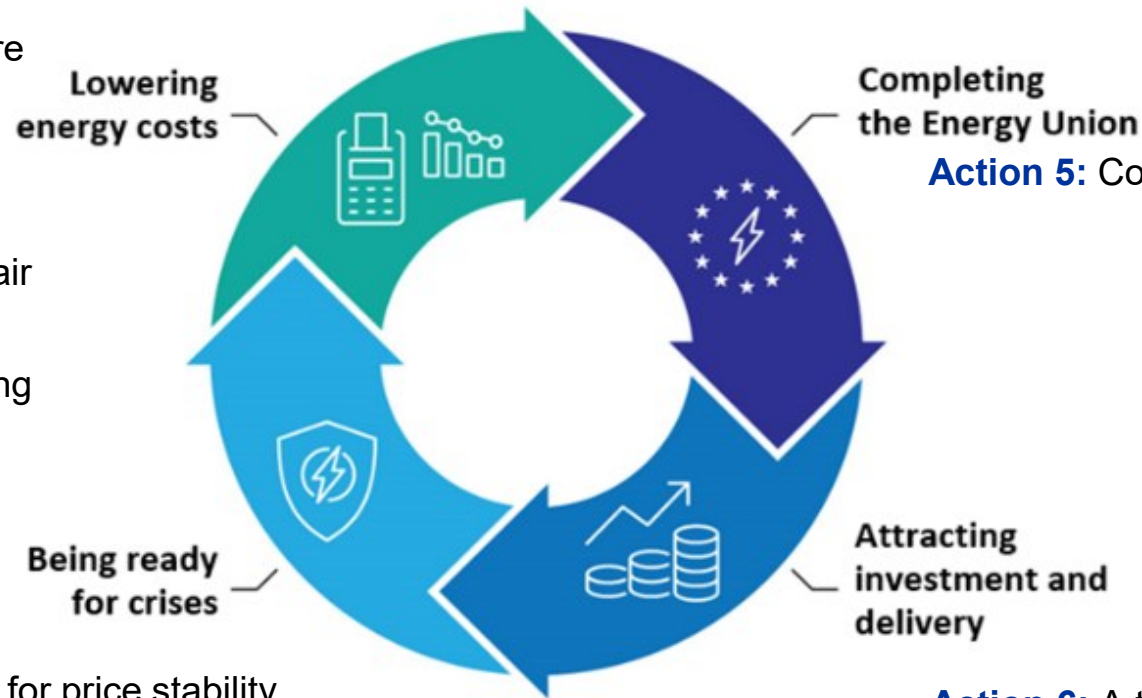
Action 2: Bring down the costs of electricity supply

Action 3: Improve gas markets for fair energy prices

Action 4: Energy efficiency: delivering energy savings

Action 7: Security of supply for price stability

Action 8: Price crisis preparedness



Action 5: Completing the Energy Union

Action 6: A tripartite contract for affordable energy

Pillar I: Lowering energy costs

Action 1

Making electricity bills more affordable

2025

More efficient network charges

Reduce taxes & levies

Increased retail competition

Action 2

Bring down costs of electricity supply

2025
2026

Long-term electricity supply contracts

Reduce permitting times

Grid expansion & modernisation

Boosting flexibility

Action 3

Ensuring well-functioning gas markets

2025

Ensuring well-functioning gas markets

Harnessing EU purchasing power to get a better deal for imported natural gas

Action 4

Energy efficiency – delivering energy savings

2025

An energy efficiency market of European dimension

Give consumers access to more efficient appliances & products



Completing the Energy Union (I)



Q1
2026

Electrification Action Plan



Q1
2026

Heating & Cooling Strategy



2026

Roadmap on Digitalisation & AI

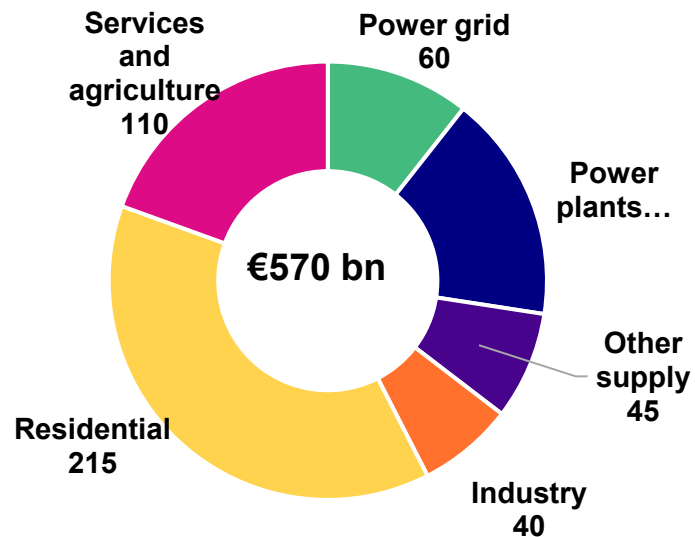


From
2025

Deeper Electricity Market Integration

Completing the Energy Union (II)

Over **€570 billion** in investment needed annually towards 2030 (**€690 billion** for next decade)



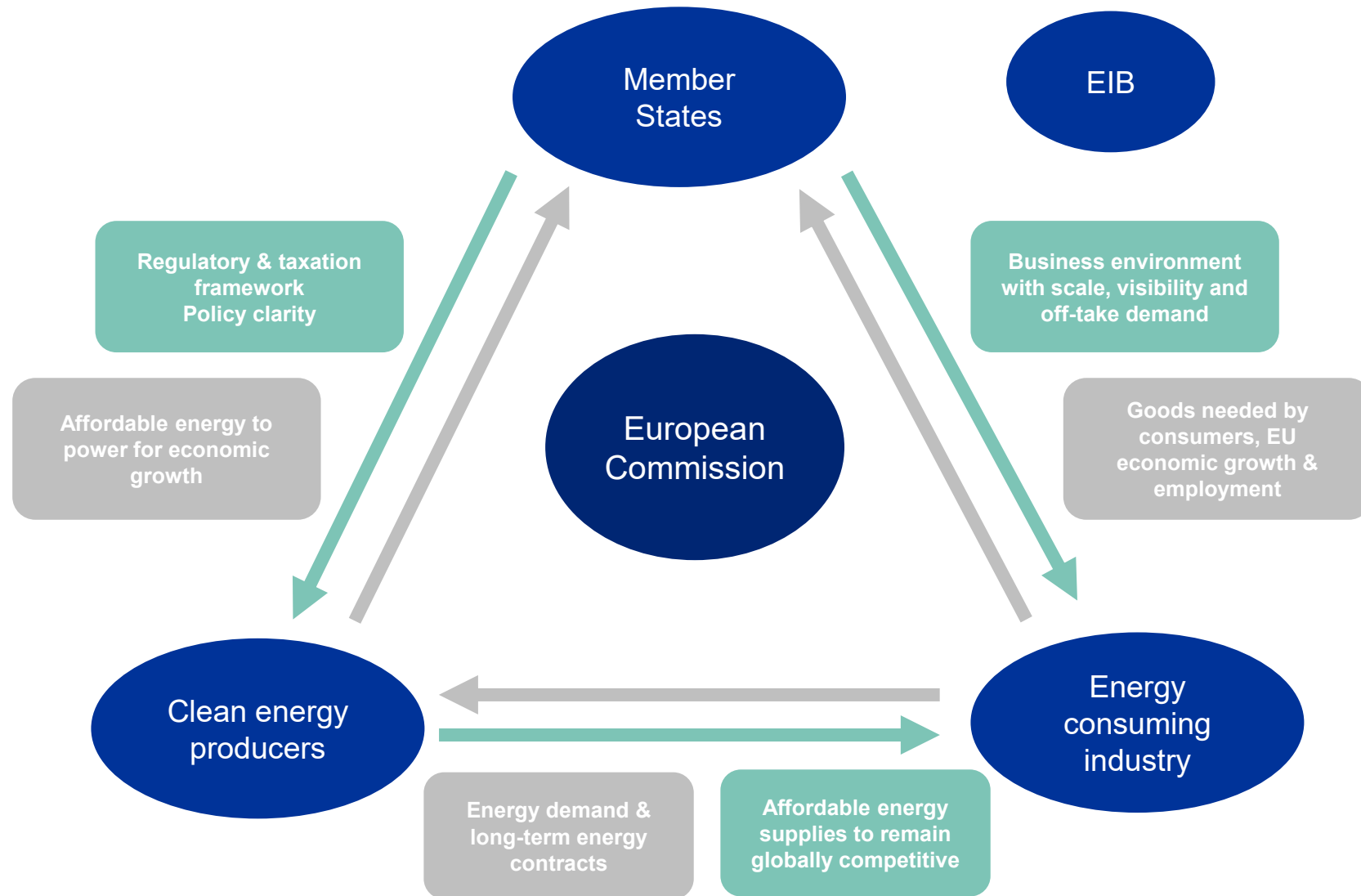
Clean Energy Investment Strategy
+ Nuclear Illustrative Program (PINC)



**Simplify, strengthen & modernise
Energy Union governance**

Pillar III: Attracting investment & ensuring delivery

Tripartite contracts



Pillar IV: Being ready for potential crises



**Security of supply &
price stability**

New regulatory framework



Price crisis preparedness

**Avoid price peaks during
energy crises**

**Increase cross-border
access to cheap electricity**

**When
necessary**

Roadmap to end imports of Russian energy

Gas

Stop all imports by the end of 2027;
new contracts will be prevented

Oil

Fresh action to address
Russia's 'shadow fleet'

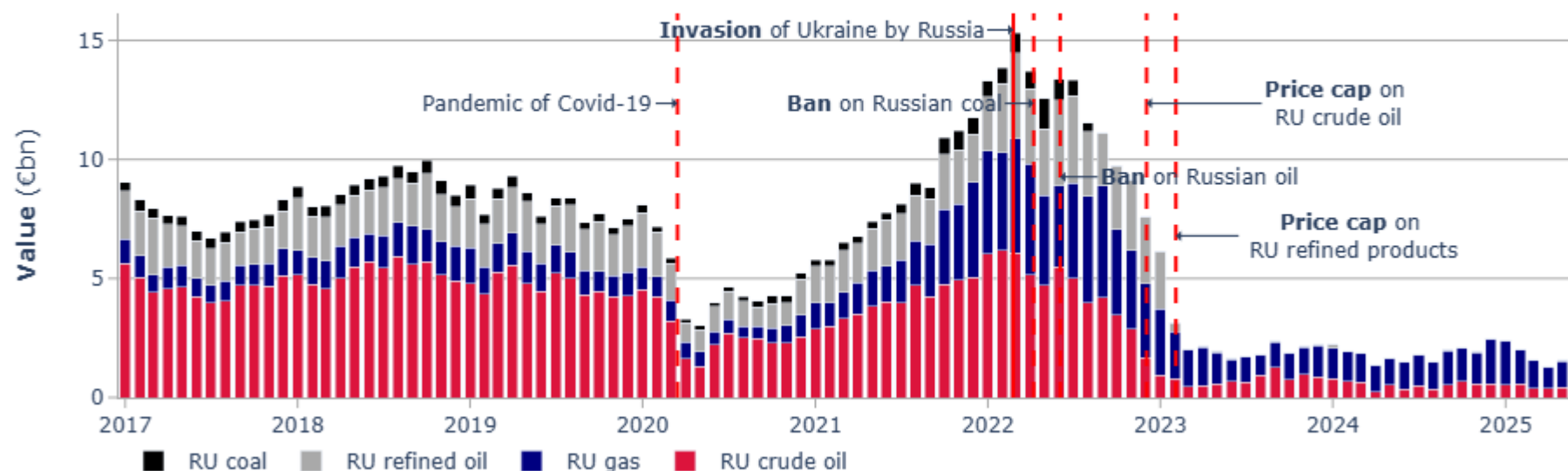
Nuclear

Restrict new supply contracts
co-signed by the
Euratom Supply Agency



EU payments for Russian Fossil Fuels

EU monthly PAYMENTS for Russian Fossil Fuels by-Products



Benefits to European consumers

Lowering electricity taxation

Potential to approx. **halve tax component** of energy bills.



Electricity market integration, renewables, flexibility

40% lower wholesale electricity prices on average in the EU.



Accelerating electrification share by 40% by 2030

€32 billion/year in energy system cost savings in 2030



Energy market integration

€40-43 billion per year in benefits for EU citizens by 2030.

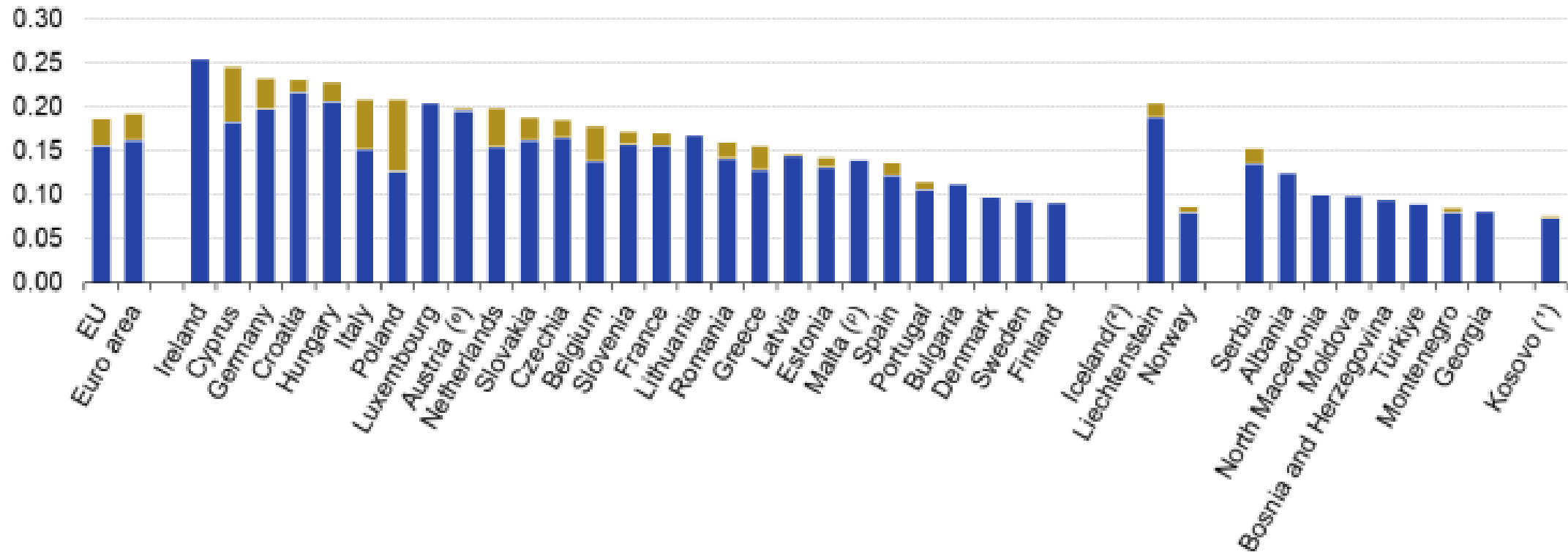


The full delivery of the Action Plan for Affordable Energy can enable the **EU's fossil fuel import bill to drop** year after year towards **€130 billion of savings per year by 2030**, representing an estimated 0.65% of GDP by 2030.



Industrial electricity prices

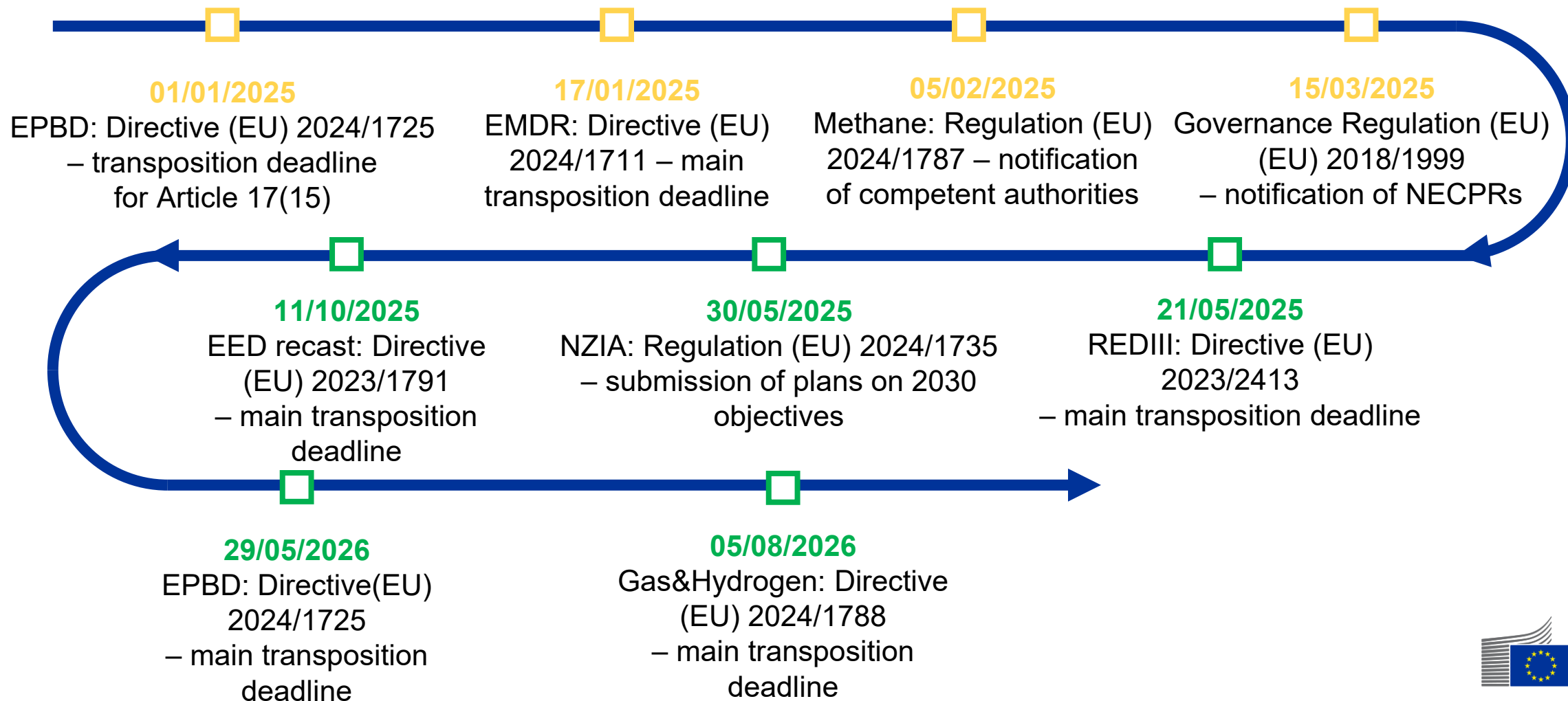
Electricity prices for non-household consumers, first half 2024
(€ per kWh)



Just transition and cross border connections

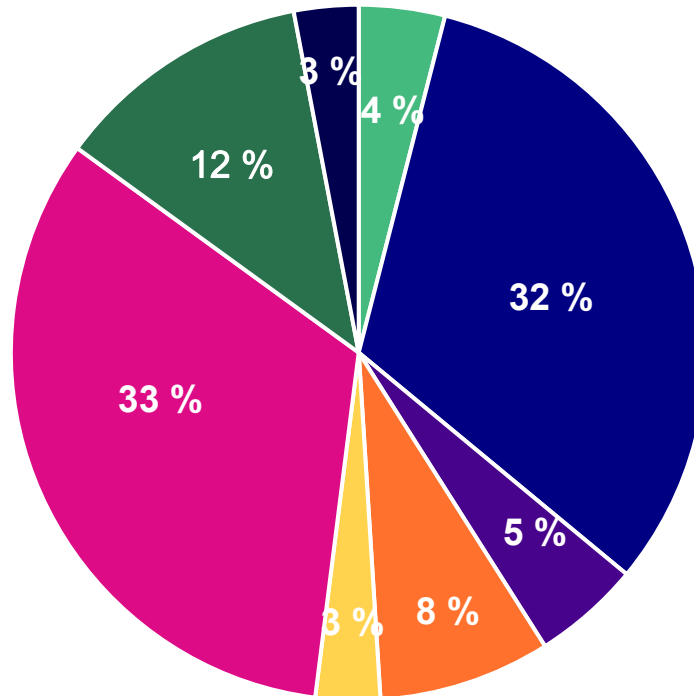
- **Social Climate Fund (65 billion€)** enters into operation 2026 to:
 - Fight **energy poverty** and
 - Support **vulnerable households, micro-enterprises, and transport users** affected by the Emissions Trading System **applied on building and transport fuels**
- Member States invited to submit their **Social Climate Plans**, outlining their national strategies for alleviating energy and transport poverty
- **NEW: European Energy Highways** for cross border infrastructure

Implementation: legislation deadlines



Enforcement: Infringement stage

Clean Energy for All package infringements by sector



- Governance Regulation
- Electricity and Gas internal market legislation
- Energy Efficiency Directive
- Energy Performance of Buildings Directive
- Security of supply legislation
- Renewables
- EURATOM Radioactive Waste Directive
- EURATOM Basic Safety Standards



EC support to Member States in transposing Directives

Planning of transposition

- only 2-year transposition period
- essential to ensure on time and correct transposition

DG ENER Guidance and Recommendations

- on different aspects of new legislation, e.g. EED, RED and EPBD
- not binding but highly useful in the process



Committee meetings

- possibility to discuss particular aspects of new legislation

Bilateral contacts

- possibility to consult EC on specific points of new legislation

Model correlation and guidance

- developed with the MSs in the EU Law Network
- Must be notified



Thank you.



Eero.Ailio@ec.Europa.eu

© European Union 2025

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

