

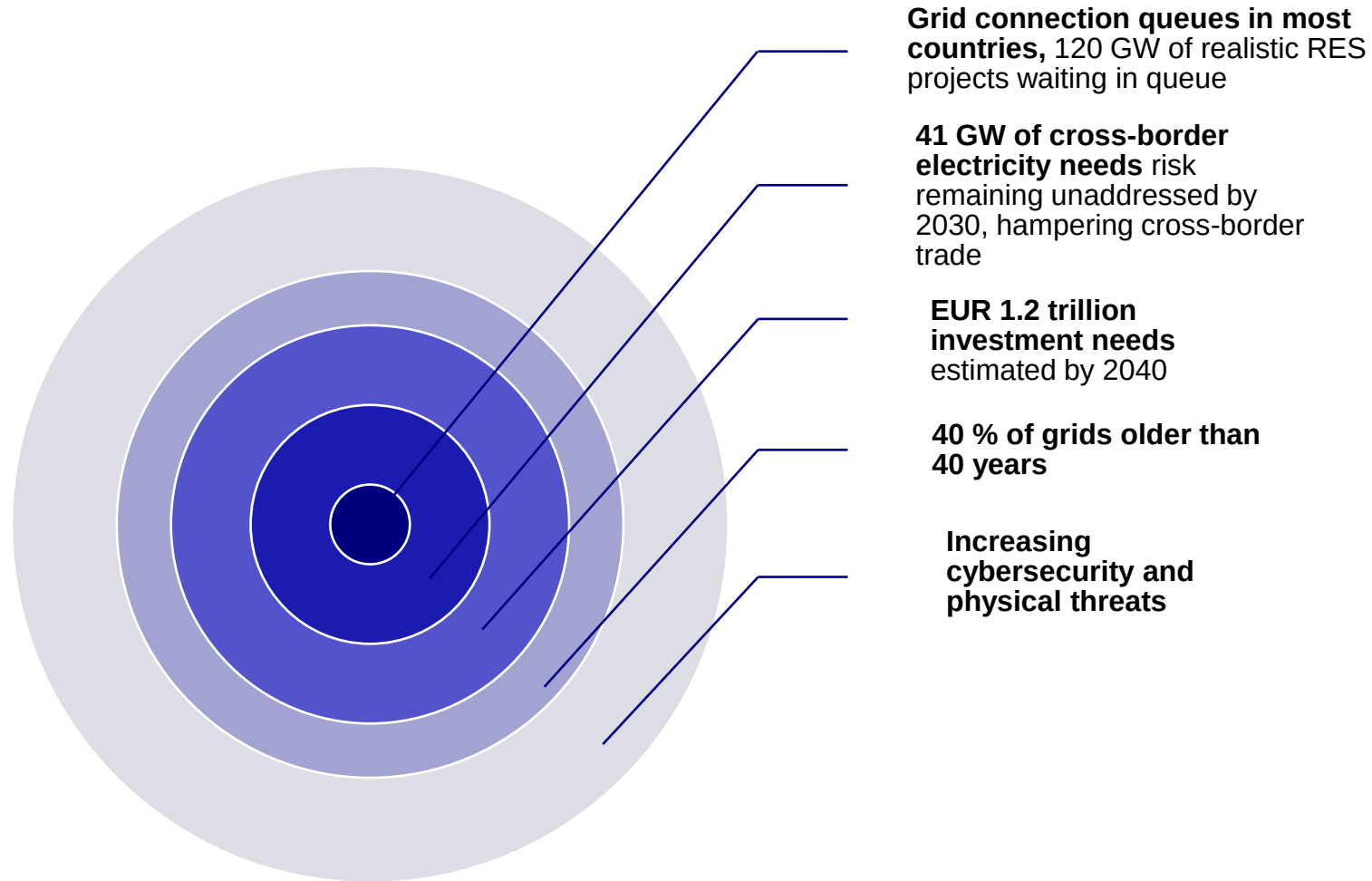
Infrastructure policy and the European Grids package

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Situation in European grids: connection queues in vast majority of countries, price divergences



Several root causes

Inadequate grid planning and development

No anticipatory investment
Insufficient visibility over future needs
Limited use of alternatives to grid development
Supply chains issues

Lack of transparency and locational signals

Capacity portals missing or not detailed
Missing locational signals in connection charges
No time of use tariffs for efficient grid use

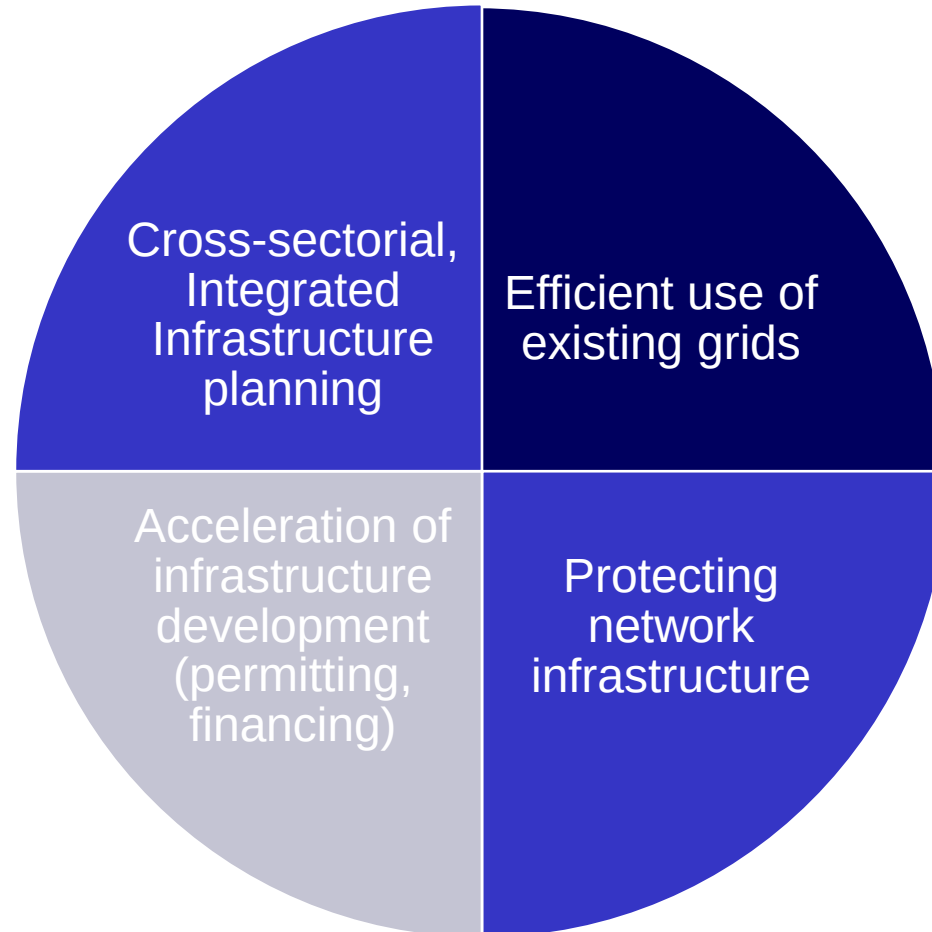
Grid connection procedures

Speculative and non-progressing connections
First-come first-served
Lack of alternative connection agreements
Digitalisation

+ lengthy permit-granting procedures, insufficient protection of infrastructure, inefficient cost-sharing mechanisms



Solutions are focusing on 4 main areas, considering system perspective



EU infrastructure policy



Trans-European Networks of Energy (TEN-E)

Selection of projects of common and mutual interest (PCIs / PMIs)



Connecting Europe Facility (CEF)

Financial support for PCIs and PMIs



Grids Action Plan

Accelerating and facilitating electricity grid development



European Grids package

Revision of the TEN-E Regulation
Permitting Directive
Guidance on grid connections



Future-proofing electricity bills

Amendment to the Electricity Regulation

+ Electricity Directive and Regulation, Net Zero Industry Act, European Skills agenda, ...



1. Infrastructure planning

Better and more coordinated EU cross-border planning framework under the revised TEN-E Regulation

EU cross-border energy infrastructure planning process that enables **more coordinated identification of needs**, ensuring projects are aligned with both current and future European objectives. Consistency across sectors and planning levels.

- Commission to develop a comprehensive **central scenario** consistent with EU energy and climate targets as basis for EU infrastructure planning every 4 years, based on input from Member States and all relevant stakeholders.
- Based on this scenario, **principles established in the TEN-E** and **a methodology** provided by **ACER**, ENTSOs and ENNOH to identify the **infrastructure needs**.
- **New “gap filling” process for the electricity system** to be activated by the Commission when infrastructure needs have been identified but no projects put forward - based on strong regional cooperation between the Member States involved and triggered only when necessary.

+ Art. 55 of the Gases Directive on national cross-sectorial planning, for gases and electricity sectors
+ upcoming network code on demand response
+ recommendations for greater stakeholder engagement and forward-looking planning under Guidance on anticipatory investment and efficient and timely grid connections



2. Efficient use of existing grids

European Grids package (TEN-E Regulation)

- Ensure **priority treatment for « non-wire solutions » and alternatives to grid development** in grid planning both at EU and national **transmission** level
- Requirement to explain how alternatives were considered in the **TYNDP** and in national **transmission network development plans**
- Including **upgrades of existing infrastructure to increase the available grid capacity or improve the efficiency of grid operation** in the scope of TEN-E
- **Guidance on efficient and timely grid connections** to further support efficient grid utilisation (including connection charges, network tariffs)

Future-proofing electricity bills Regulation

- **Incentives to system operators** for more efficient management of the grid (TOTEX approach, flexibility, deployment of non-wire digital solutions)
- **Incentives to system users** for system-friendly behaviour (reduction of peak load consumption, time-of-use, locational investment signals)
- NRAs shall **promote deployment of non-wire, smart and digital solutions**, including priority consideration in planning on **distribution** level
- ACER recommendation to NRAs on **smart grid indicators** + progress report every 3 year
- **Deadlines for smart metering deployment:** 50% of all final customers by end of 2030, and 75% of all final customers by end of 2033



3. Accelerating network development

Accelerating permit-granting procedures (Permitting Directive)

Horizontal measures on

- Digitalisation of authorization procedures
- Adequate resources and staffing of permitting authorities
- Tacit approval
- Single points of contact

Targeted measures on

- Renewable energy, storage and recharging stations, under the Renewable Energy Directive.
- Electricity transmission and distribution system infrastructure, under the Electricity Market Directive.
- Hydrogen production facilities and hydrogen system infrastructure, under the Gas Market Directive.

Ensuring fair and efficient cost-sharing (TEN-E Regulation)

- **Transparency on projects' benefits** beyond their hosting countries and EU principles for a fair and predictable CBCA process.
- A framework that supports **voluntary bundling of cross-border PCI and PMIs** to enable and encourage cost-sharing discussions amongst relevant Member States and third countries.
- New rules on the use of **congestion income** for financing cross-border electricity infrastructure as an incentive to cost-sharing: earmarking 25% of unused congestion income for PCIs and PMIs.



4. Security and resilience of our cross-border energy infrastructure

Strengthening the security and resilience of our energy infrastructure is critical in **today's geopolitical context** and in light of **increasing climate-related risks**

- The **European Grids Package** includes proposals to:
- Including **security and resilience** related **upgrades of existing infrastructure** in the scope of the TEN-E
- Introduce **physical and cyber security and resilience considerations in the monitoring of PCI and PMIs**, ensuring **resilience by design**.
- Increase transparency regarding the **ultimate beneficiary ownership** and ensure that this information **can be taken into consideration when selecting PCIs and PMIs**.



Recent workshops to support implementation of existing provisions and non-legislative initiatives

Grids Action Plan

Smart grid indicators reports published in January 2026, workshops in May (ACER, ENTSO-E) and September (CEER, DSO Entity)

Guidance on anticipatory investment

Workshops on DSO network planning (ACER, November 2025, DSO entity, May 2026)

Anticipatory investment workshop (March 2026)

Guidance on efficient and timely grid connections

Workshop on flexible connection agreements (April 2026)

Workshop on grid connections (5 October 2026)

Workshop on regulatory incentives / addressing CAPEX-bias (late 2026)

Conclusions of European Commission workshops and meeting material available online

[European grids - European Commission](#)



Thank you for your attention.



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