Energy Transitions Commission

2026 and beyond: shaping the future ETC work programme

ETC Commissioners meeting

26 June 2025

ETC Impact Model

Fact based, collaborative, action-oriented research approach

Findings are industry-backed and owned

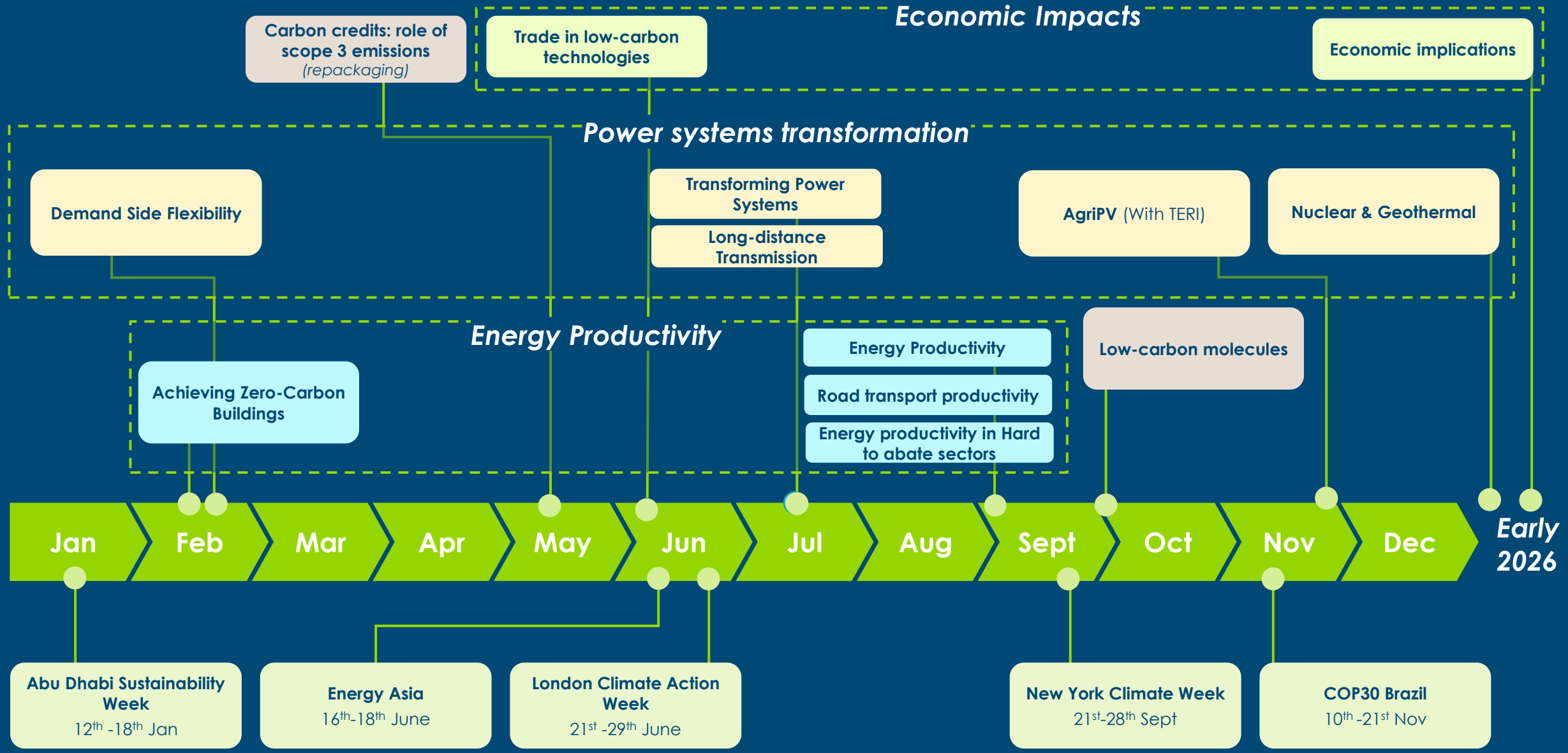
Extensive engagement with critical decision makers to disseminate findings

ETC members own conclusions and advocate for recommendations externally

Policymakers are more receptive to recommendations backed by business leaders

Transforming members' outlook and knowledge is leading to new strategies

2025 ETC programme schedule



ETC's impact highlights from 2025 so far

As a trusted source of facts, ETC was mentioned in 1200 recent news stories

How the world has responded to Trump's Paris climate agreement withdrawal — The Guardian

Martin Wolf talks to Adair Turner: Can the world decarbonise fast enough? — FINANCIAL TIMES

"As fast as we possibly can": Energy expert on transitioning to renewables — cna

"Los apagones seguirán ocurriendo": los expertos internacionales urgen a 'preparar' el sistema eléctrico — EL ESPAÑOL

How to decarbonize every building everywhere – just not all at once — CANARY MEDIA, Clean energy journalism for a cooler tomorrow

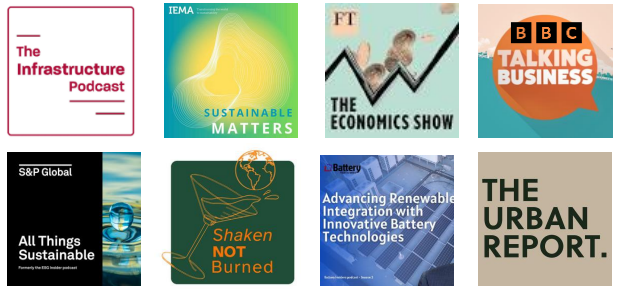
Future electricity demands need to be more flexible — BusinessGreen

Our direct reach expands

ETC now reaches 30,000+ newsletter subscribers

We are engaging new audiences through new channels

Recorded 8 podcast episodes



Leveraging social media to reach new networks

17,000+ followers (up 14%)
150,000+ impressions (up 44%)

Launched BlueSky Account

There is strong interest for our evidence-base

5,000+ file downloads on the ETC website

We regularly speak to a global audience

ETC has attended over 50 events around the world:

Pre read only

ETC key events calendar 2025

ETC attending | ETC not attending

	Q1	Q2	Q3	Q4
Key Moments	ADSW; Davos 2025	Energy Asia; LCAW	CEM16; NYCW	COP30; G20
Confirmed Participation	International Energy Week; Abu Dhabi Sustainability Week (ADSW); The Economist's 10th Anniversary Sustainability Week; London Energy Storage Summit; Australian High Commission Forum – supply chains; Berlin Energy Transitions Dialogue; EBRD Wise Person's roundtable	Energy Asia Summit; ETC/Kiko LCAW 'Art of the Possible'; IEA Energy Efficiency conference; Iberdrola Buildings Roundtable; Mission 2025 LCAW 'New Economy Rising'; SSAB Leading the Way Event; Innovation Zero World Congress; Cities Climate Action Summit; S&P Global London Sustainable 1; FT Climate & Impact Summit; IDRIC Green Industrial Futures; FT Live Hydrogen Summit	New York Climate Week; Green Hydrogen Summit UK & IRE; IPE Infrastructure and Natural Capital Rotterdam; UK Solar Summit; Central and Eastern Europe ESS Summit Poland	Global Maritime Forum Annual Conference
On our radar	FT Live Commodities Global Summit; CERA Week; TRANSFORM	IEA Summit on the Future of Energy Security; IRENA Innovation Week; European Sustainable Energy Week (EUSEW) Policy Conference; UNIDO International Vienna Energy Forum	IEA Global Conference; Clean Energy Ministerial; Africa Energy Week	G20; Economist Impact Sustainability Week Europe; Economist Impact Sustainability Week Africa

ETC's 2-year Communications Programme (2024-2025):

Pillar 1: Amplify

To expand the evidence-base: helping to win ongoing debates

- **Broadening ETC presence, focusing on:**
  - Tier 1 media and non-English international media.
  - Social media
  - Key sectoral and regional events.
- **Direct engagements** through:
  - Targeted outreach campaigns
  - ETC Matters newsletter

Pillar 2: Repeat

To inform and explain: dispelling myths, correcting misinformation, and explaining and re-explaining complex ideas

- **Through shorter, more digestible forms, e.g.**
  - Op-eds & blogs
  - Events
  - Podcasts & You Tube
  - Infographics
  - Short explainers
  - Digital (videos) and social campaigns

Pillar 3: Extend

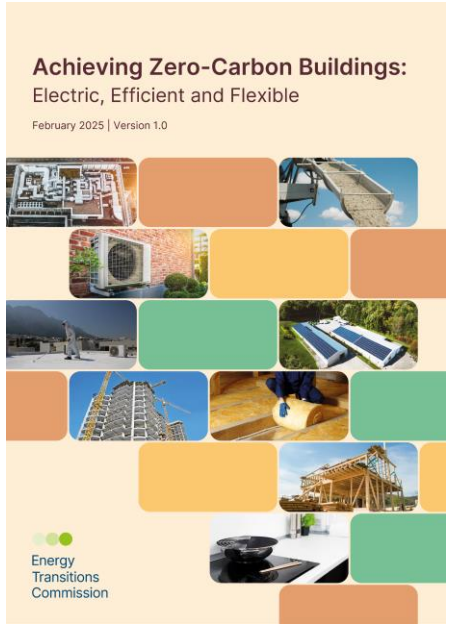
To educate and convince: expanding current audiences into previously unaware or unconvinced

- **Through audience specific** tailored content
  - Wider-reaching podcasts
  - Digital story-telling
  - Social media
- Build on **existing collaborations** (Global Optimism, GSCC) & **move outside our comfort zone** (new audiences)
- **Direct outreach** with high impact interest groups (Youth, faith, culture & sport) e.g. Count Us In

Pillar 1: Amplifying ETC reports

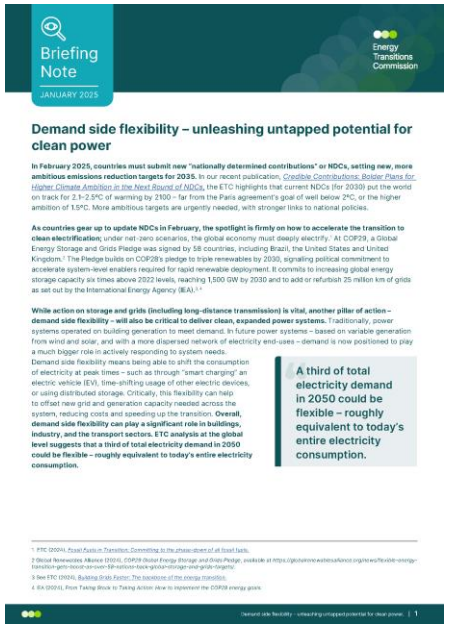
2025 ETC Reports

February



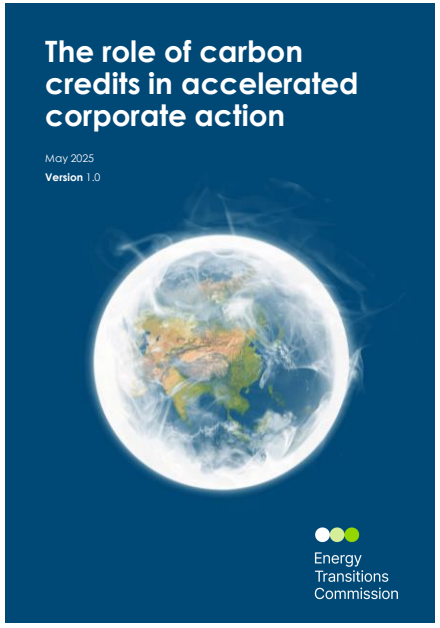
ETC draws a complete picture of the buildings sector's emissions and energy use and describes how a combination of electric, efficient, and flexible solutions can decarbonise buildings.

February



ETC highlights the critical role of demand side flexibility in delivering clean, expanded power systems as countries gear up to increase ambition of Nationally Determined Contributions (NDCs)

May



ETC clarifies the role of high-integrity carbon credits in scaling up carbon dioxide removals and achieving corporate net-zero targets

Responding to SBTi's updated Net-Zero Corporate Standards consultation

June

ETC discusses the role of trade in accelerating the energy transition and highlights two key areas: principles for nearshoring supply chains and carbon pricing.

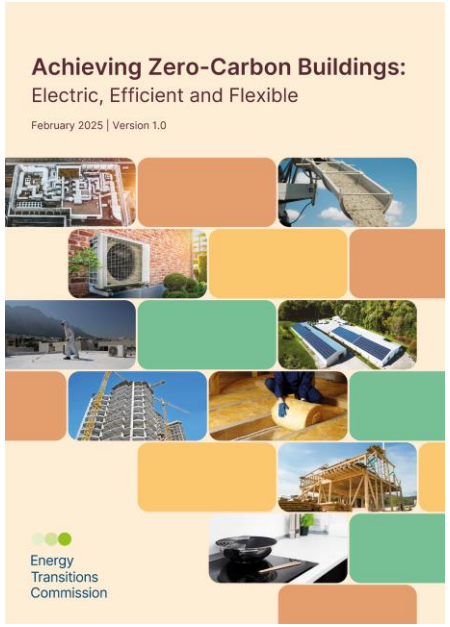
July

ETC underscores that it is technically and economically possible to operate and balance power systems with high shares of wind and solar (e.g. 70-80%+) through technologies existing today, delivering system stability and round-the-clock electricity.

Achieving Zero-Carbon Buildings

Pillar 1: Amplifying ETC reports

February

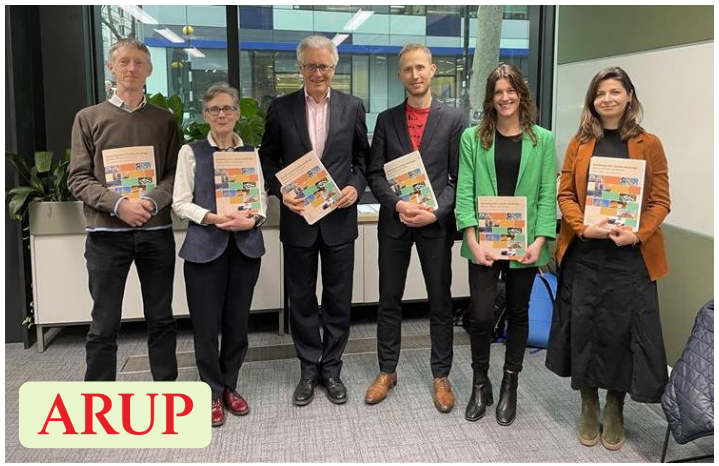


ETC draws a complete picture of the buildings sector's emissions and energy use and describes how a combination of electric, efficient, and flexible solutions can decarbonise buildings.

Targeted international media: trade titles and broadcast. Our press release newswire distribution to over 30 countries and embargoed briefings with journalists led to coverage in over 600 news stories at launch.

- el periódico de la energía — Commercial buildings must lead the transition to net-zero emissions
- SmartCitiesWorld — How to decarbonise the building sector
- The Infrastructure Podcast — Episode 113 Guest: Lord Adair Turner, chair of the Energy Transitions Commission
- TerraGreen — Zero-carbon Cooling in a Warming World: Expanding access while reducing carbon emissions

ETC x Arup webinar drew around 300 attendees

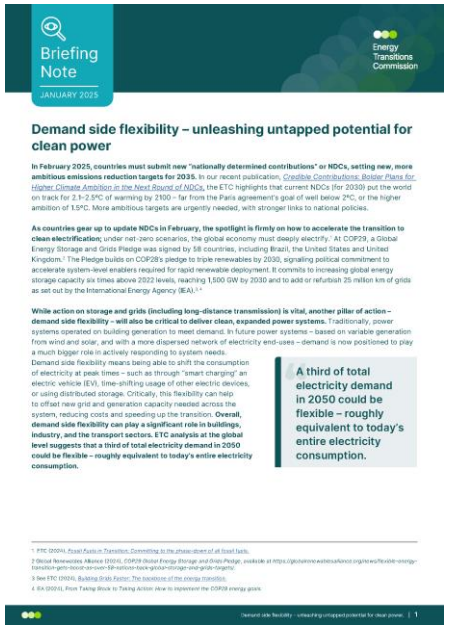


Roundtable in Madrid with Built Environment Stakeholders

- **ETC members amplified key messages on social media**
- **Our buildings newsletter issue reached over 24,000 people**
- **ETC also joined panels hosted by WBCSD and Green Building Council España (GBCE)**

Demand Side Flexibility

February


Briefing Note
JANUARY 2025
Energy Transitions Commission

Demand side flexibility – unleashing untapped potential for clean power

In February 2025, countries must submit new "nationally determined contributions" or NDCs, setting new, more ambitious emissions reduction targets for 2035. In our recent publication, Credible Contributions: Better Plans for Higher Climate Ambition in the Next Round of NDCs, the ETC highlights that current NDCs (for 2030) put the world on track for 2.1–2.5°C of warming by 2100 – far from the Paris agreement's goal of well below 2°C, or the higher ambition of 1.5°C. More ambitious targets are urgently needed, with stronger links to national policies.

As countries gear up to update NDCs in February, the spotlight is firmly on how to accelerate the transition to clean electrification; under net-zero scenarios, the global economy must deeply electrify.[1] At COP29, a Global Energy Storage and Grids Pledge was signed by 58 countries, including Brazil, the United States and United Kingdom.[2] The Pledge builds on COP28's pledge to triple renewables by 2030, signalling political commitment to accelerate system-level enablers required for rapid renewable deployment. It commits to increasing global energy storage capacity six times above 2022 levels, reaching 1,500 GW by 2030 and to add or refurbish 25 million km of grids as set out by the International Energy Agency (IEA).[3,4]

While action on storage and grids (including long-distance transmission) is vital, another pillar of action – demand side flexibility – will also be critical to deliver clean, expanded power systems. Traditionally, power systems operated on building generation to meet demand. In future power systems – based on variable generation from wind and solar, and with a more dispersed network of electricity end-users – demand is now positioned to play a much bigger role in actively responding to system needs.

Demand side flexibility means being able to shift the consumption of electricity at peak times – such as through "smart charging" an electric vehicle (EV), time-shifting usage of other electric devices, or using distributed storage. Critically, this flexibility can help to offset new grid and generation capacity needed across the system, reducing costs and speeding up the transition. **Overall, demand side flexibility can play a significant role in buildings, industry, and the transport sectors. ETC analysis at the global level suggests that a third of total electricity demand in 2050 could be flexible – roughly equivalent to today's entire electricity consumption.**

> **A third of total electricity demand in 2050 could be flexible – roughly equivalent to today's entire electricity consumption.**

1. ETC (2024). Fossil Fuels in Transition: Committing to the phaseout of all fossil fuels.
2. Global Renewables Alliance (2024). COP29 Global Energy Storage and Grids Pledge, available at https://globalrenewablesalliance.org/news/global-energy-transition-gets-boost-as-over-58-nations-back-global-storage-and-grids-pledge/.
3. See ETC (2024), Building Grids Faster: The backbone of the energy transition.
4. IEA (2024), From Taking Stock to Taking Action: How to implement the COP28 energy goals.

Demand side flexibility – unleashing untapped potential for clean power | 1

ETC highlights the critical role of demand side flexibility in delivering clean, expanded power systems as countries gear up to increase ambition of Nationally Determined Contributions (NDCs)

We published a short blog post on demand-side flexibility ahead of the briefing note which led to additional work and funding with Pool fund on International Energy (PIE) – European Climate Foundation.

Demand side flexibility: unleashing untapped potential alongside electricity grids and storage

The trajectory to net-zero relies on massive clean electrification: Electricity will grow from 20% of all energy used today to over 60% by 2050. The ETC's latest scenarios estimate at least a doubling of global electricity use by 2050, potentially reaching over 75,000 TWh compared to today's approximate 28,000 TWh.[1] **To achieve this in just 25 years, the power system must expand in scale and transform how electrons flow through the system.**

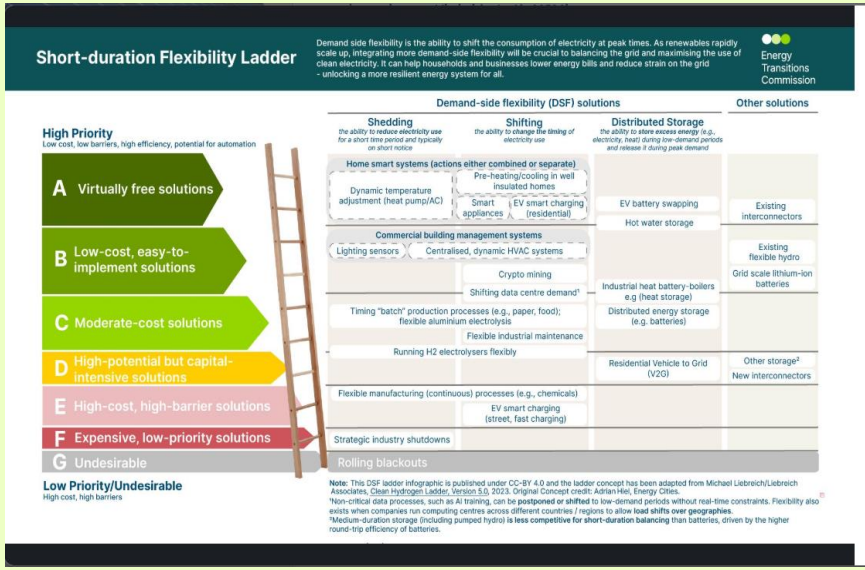
We placed three op-eds in relevant trade publications

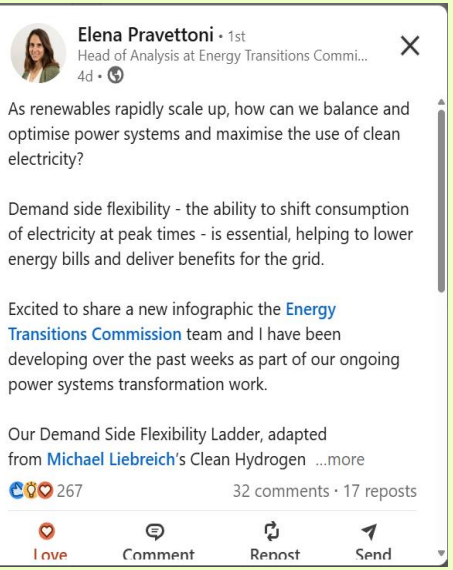
BusinessGreen™

ENERGY VOICE
Leading the global energy conversation

NEW ENERGY WORLD
The magazine of the Energy Institute

Our short-duration flexibility ladder drew over 70,000 impressions, 600 reactions, and 60 comments from the energy sector on social media





Michael Liebreich "This is great… to understand that there are smarter and dumber solutions, and to get the discussion focused."

Likes from across the world at senior levels, including:

- Head of UK Clean Power Taskforce
- Chair of UK Government's Energy Digitalisation Taskforce
- Executive Director of Australian Net Zero Commission

Global Trade in the Energy Transition

Pillar 1: Amplifying ETC reports

June

ETC discusses the role of trade in accelerating the energy transition and highlights two key areas: principles for nearshoring supply chains and carbon pricing.

At launch, Adair presented key insights to the OECD

ETC members helped disseminate the report and findings on social media

Jean-Pascal Tricoire • 3rd+
Chairman at Schneider Electric
20h •
✓ Following

As the global energy landscape evolves, policy must keep pace. The Energy Transitions Commission's latest briefing offers timely insights on aligning technological progress and carbon pricing with effective global trade.

The ETC outlines a pragmatic and principled approach to two critical challenges:

• Building resilient domestic supply chains – Six policy principles to guide national strategies.
• Carbon pricing and CBAMs – A call for globally coherent policies to decarbonize hard-to-abate sectors.

Faustine Delasalle • 1st
Chief Executive Officer, Mission Possible Partnership
22h •

New briefing note from the Energy Transitions Commission on "Global trade in the energy transition: principles for clean energy supply chains and carbon pricing".

Clean trade can be a powerful accelerator of the global energy transition, enabling clean energy supply chains to scale up faster. However, growing concerns over concentrated supply chains and perceptions that carbon border adjustments are protectionist could significantly delay global progress.

Alan Thomson • 2nd
Director, Global Energy Business Leader at Arup
23h •
✓ Following

If you would like to know more about CBAM, carbon pricing, clean supply chains and other global net-zero mechanisms it is worth a read of this recent report from the Energy Transition Commission, one of Arup's Strategic Global Partners. A really concise, well written and informative overview of this rather dry, but important subject. #Arup #CBAM

Targeted international media, Tier 1 and trade outside of UK and US. Our press release newswire distribution to over 30 countries and briefings with journalists led to coverage in over 200 news stories around launch.

BusinessGreen	Report: Carbon levies and diverse supply chains 'essential' for energy transition
Energy Monitor	ETC briefing highlights global energy trade challenges
CARBONCOPY MAKING CLIMATE SENSE	Carbon Pricing Key to Drive Decarbonisation in Internationally Traded Sectors
Borderlex	Interview: Europe 'can win argument' over carbon border adjustment

Transforming Power Systems

July

ETC underscores that it is technically and economically possible to operate and balance power systems with high shares of wind and solar (e.g. 70-80%+) through technologies existing today, delivering system stability and round-the-clock electricity.

Recent Spain and Portugal blackouts has put grid resilience high on the news agenda, and we have used this to comment as a "trusted" source and preview the Power Systems work

Iberia mess places timely focus on grid resilience — Reuters

Europe's first grid crisis may not be its last — FT Financial Times

Massive blackout reignites culture war over the future of nuclear energy in Spain — EL PAÍS

The great Iberian power cut need not spell disaster for renewables — The Economist

We have briefed:

- **Journalists,** including The Economist, Financial Times & Reuters
- **Media panel with GSCC - 30 Tier 1/European media**

And spoken about this report to:

- **Chris Stark**, Head of UK's Mission for Clean Power and DESNZ
- Climate Action's **Global Clean Power Taskforce**

Preview campaign will continue in build-up to launch in socials, media, events (including LCAW) media and to partners.

During preview period, ETC will work on developing media ready messaging and materials to tell and sell the story.

Pillar 2: Repeating Existing Insights

Responding to Tony Blair Institute's Climate Paradox Report

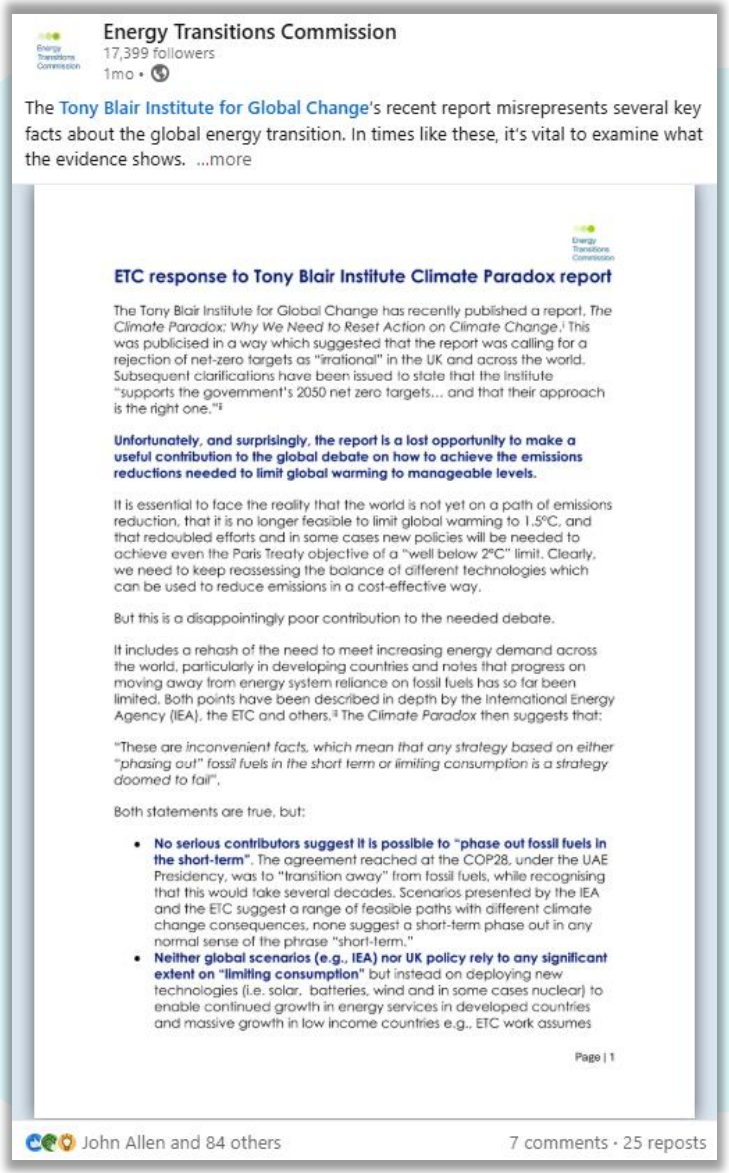
May

The Tony Blair Institute for Global Change published a paper entitled "The Climate Paradox: Why We Need to Reset Action on Climate Change"

It misrepresented several key facts about the global energy transition.

The Energy Transitions Commission published a statement on our view of the transition, grounded in rigorous analysis and real-world data.

We provided an evidence-based perspective, to educate, inform and combat disinformation.



Energy Transitions Commission
17,399 followers
1mo •

The Tony Blair Institute for Global Change's recent report misrepresents several key facts about the global energy transition. In times like these, it's vital to examine what the evidence shows. ...more

ETC response to Tony Blair Institute Climate Paradox report

The Tony Blair Institute for Global Change has recently published a report, *The Climate Paradox: Why We Need to Reset Action on Climate Change*.[i] This was publicised in a way which suggested that the report was calling for a rejection of net-zero targets as "irrational" in the UK and across the world. Subsequent clarifications have been issued to state that the Institute "supports the government's 2050 net zero targets... and that their approach is the right one."[ii]

Unfortunately, and surprisingly, the report is a lost opportunity to make a useful contribution to the global debate on how to achieve the emissions reductions needed to limit global warming to manageable levels.

It is essential to face the reality that the world is not yet on a path of emissions reduction, that it is no longer feasible to limit global warming to 1.5°C, and that redoubled efforts and in some cases new policies will be needed to achieve even the Paris Treaty objective of a "well below 2°C" limit. Clearly, we need to keep reassessing the balance of different technologies which can be used to reduce emissions in a cost-effective way.

But this is a disappointingly poor contribution to the needed debate.

It includes a rehash of the need to meet increasing energy demand across the world, particularly in developing countries and notes that progress on moving away from energy system reliance on fossil fuels has so far been limited. Both points have been described in depth by the International Energy Agency (IEA), the ETC and others.[iii] *The Climate Paradox* then suggests that:

"These are *inconvenient facts, which mean that any strategy based on either "phasing out" fossil fuels in the short term or limiting consumption is a strategy doomed to fail*".

Both statements are true, but:

- **No serious contributors suggest it is possible to "phase out fossil fuels in the short-term"**. The agreement reached at the COP28, under the UAE Presidency, was to "transition away" from fossil fuels, while recognising that this would take several decades. Scenarios presented by the IEA and the ETC suggest a range of feasible paths with different climate change consequences, none suggest a short-term phase out in any normal sense of the phrase "short-term."
- **Neither global scenarios (e.g., IEA) nor UK policy rely to any significant extent on "limiting consumption"** but instead on deploying new technologies (i.e. solar, batteries, wind and in some cases nuclear) to enable continued growth in energy services in developed countries and massive growth in low income countries e.g., ETC work assumes

Page | 1

John Allen and 84 others — 7 comments · 25 reposts

Our statement was welcomed by industry leaders

Ian Simm • 2nd ✓ Following
Founder & Chief Executive at Impax Asset Management
1mo •

For those (like me) who reviewed the Tony Blair Institute report but didn't have the bandwidth to set out why it was in parts muddled and misleading. Many thanks to the great team at Energy Transitions Commission !

Richard Black • 2nd ✓ Following
Director of Policy & Strategy at Ember
1mo •

"We welcome debate. But we must start from facts." And one of the facts is, as this explains, is that the Tony Blair Institute for Global Change produced a "disappointingly poor" contribution. And if you're as big in the world as Tony Blair, it matters - doubly disappointing that he doesn't see this

Faustine Delasalle • 1st
Chief Executive Officer, Mission Possible Partnership
1mo • Edited •

Adair Turner and the tremendous Energy Transitions Commission's team are setting the record straight after the misleading report from the Tony Blair Institute for Global Change on the net-zero transition. All based on a decade of ETC reports that - and that's the beauty of the exercise - have all been endorsed by a large cohort of corporate leaders (including from the fossil fuels, power, and energy-intensive industry sectors) alongside leaders from environmental NGOs.

The role of carbon credits in accelerated corporate action

May

ETC clarifies the role of high-integrity carbon credits in scaling up carbon dioxide removals and achieving corporate net-zero targets, **building on our 2022 report, Mind the Gap**.

Responding to SBTi's updated Net-Zero Corporate Standards consultation

Shared the briefing directly with a list of key stakeholders, media, partners and businesses

"All good ideas, which we'll consider seriously."

David Kennedy, CEO of the Science Based Targets initiative

SCIENCE BASED TARGETS

ETC's members and partners helped disseminate this visual-led work on social media

Julio Friedmann • 2nd
Helping Reduce & Remove CO2 from the air and oceans through investment, ...
1w •

Huzzah! The Energy Transitions Commission has a new brief.

The ETC's new briefing note clarifies the role of high-integrity carbon credits in scaling up carbon dioxide removals and achieving corporate net-zero targets. The ETC generally endorses the high-ambition corporate strategies set out by @Science Based Targets initiative's Corporate Net-Zero Standard draft revision (CNZS V2) as an important step in helping to scale critical carbon dioxide removals.

All y'all can download the full analysis here:
https://lnkd.in/gfvEQ_J2


The role of carbon credits in accelerated corporate action
energy-transitions.org

You and 21 others 1 comment · 2 reposts

WRI Polsky Center for the Global Energy Transition
1,978 followers
1w •

The Energy Transitions Commission's new briefing note clarifies the role of high-integrity carbon credits in scaling up carbon dioxide removals and achieving corporate net-zero targets. The ETC generally endorses the high-ambition corporate strategies set out by Science Based Targets initiative's Corporate Net-Zero Standard draft revision (CNZS V2) as an important step in helping to scale critical carbon dioxide removals.

Download the full analysis: https://lnkd.in/gYZMnakc

Industrial Transition Accelerator (ITA)
1,687 followers
3d •

The Energy Transitions Commission's new briefing note clarifies the role of high-integrity carbon credits in scaling up carbon dioxide removals and achieving corporate net-zero targets.

The ETC generally endorses the high-ambition corporate strategies set out by Science Based Targets initiative's Corporate Net-Zero Standard draft revision (CNZS V2) as an important step in helping to scale critical carbon dioxide removals.

Download the full analysis: https://lnkd.in/emp6kZy5

Revisiting Fossil Fuels in Transition analysis to clarify fossil demand post-2025

FF demand group collaborating to share insights

WE MEAN BUSINESS COALITION

Energy Transitions Commission

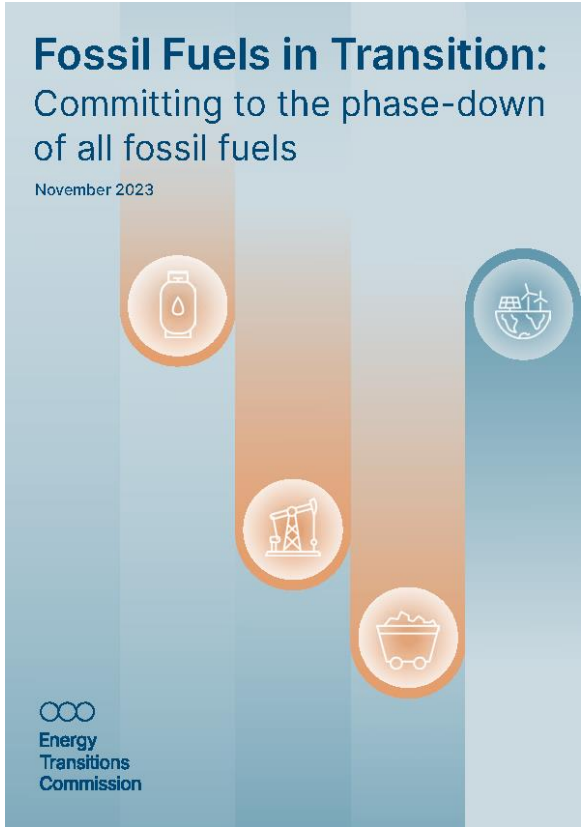
EMBER

E3G

WMBC has brought together experts from ETC, Ember and E3G into a group to cocreate analysis to **shed light on the implications of the clean energy transition for fossil demand**

A deck has been created (repackaging existing work) to **challenge growth scenarios for fossil fuels** put forward by certain industry bodies and participants

Using existing ETC insights to provide evidence for joint report



Pillar 3: Informing Influencers and Extending ETC's Audience

We have a strong level of external engagement, beyond ETC membership

2025 External events

+
an additional 30+ events this year

Bilateral conversations

Over 150 bilateral meetings this year,
including **interviews and podcast** recordings

Informing the influencers and reaching new audiences

ETC has increased focus on international media

Descarbonizar los edificios a bajo coste

Expansión

US climate retreat highlights need for China-EU green co-op

Global Times

Von Immobilien zu Real Assets

Die Rolle der Erneuerbaren Energien in der Energiewende

[The Property Post]

Das Online-Meinungsportal für die deutsche Immobilienwirtschaft

Extending our reach by working with members

ARUP

SAINT-GOBAIN

KIKO

Iberdrola

WORLD RESOURCES INSTITUTE

Targeting social media influencers to disseminate ETC insights

HERO

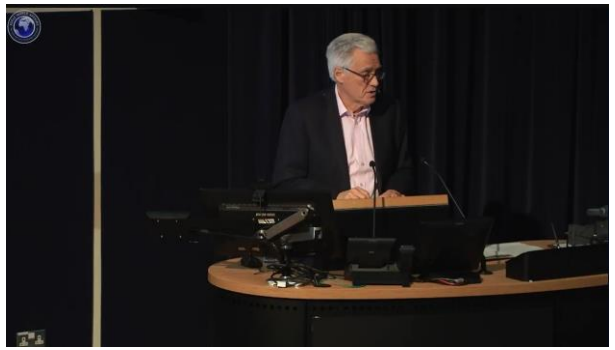
Briefing 8 "influencers" across the world to seed key insights from our reports

Reaching wider groups through events

KEELE WORLD AFFAIRS

Europe's Leading Series of Lecture Meetings on International Politics and Global Issues

Providing energy transition facts across the political spectrum



Partnering to drive greater impact and reach

GLOBAL OPTIMISM

Climate Action

WE MEAN BUSINESS COALITION

MI25ION

Reaching new audiences at international events

BERLIN ENERGY TRANSITION DIALOGUE.25

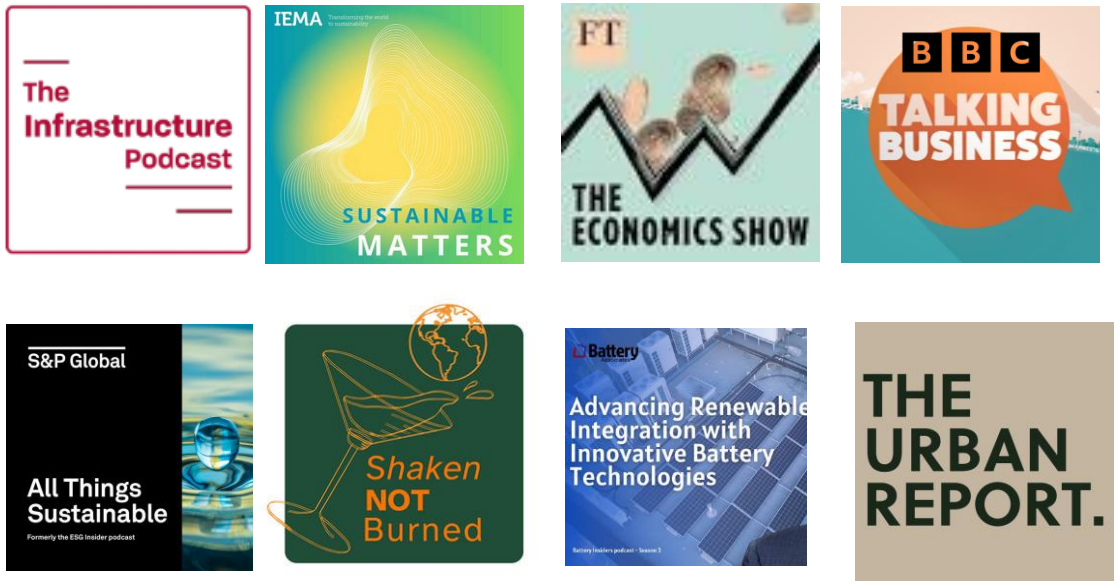
ENERGY ASIA

ETC are using partnerships to reach new groups of audiences

Organisations involved	Objective	Potential outcomes
STUDENT ENERGY; CLIMATE CARDINALS; YOUNGO – OFFICIAL YOUTH CONSTITUENCY OF THE UNFCCC	**To build/educate a global youth network** campaigning for most effective clean power change	- Educate leaders of tomorrow - Effective youth campaigning causing positive policy change - Link global voices
MI25ION	**To seed positive energy transition messages** into cabinet rooms, board rooms and living rooms	- Build positive momentum at big climate events (LCAW, COP) - Use external comms resource to increase ETC reach
Global Renewables Alliance; Agora Energiewende; ReNew2030; ISD Institute for Strategic Dialogue; GWEC Global Wind Energy Council; Global Strategic Communications Council GSCC; Energy & Climate Intelligence Unit	**To build media consensus around trusted data** to reduce impact of mis/disinformation in the transition and shine light on useful tools	- Roundtable of key actors - ETC data playing key role in shared bank of transition 'facts'
Global Alliance for Buildings and Construction; Cool Coalition; Clean Heat Forum	**To accelerate global built environment decarbonisation** by sharing insights with key networks	- Joint webinars with global audiences - Increase focus on workable solutions, reduce noise

2025 has seen a renewed focus on podcasts and YouTube refresh

Recorded 8 podcast episodes



Refreshed ETC YouTube, longer-form content focus

How to achieve a net-zero economy by 2050

10K views • 2 years ago

Achieving a net-zero economy is in our reach - this is how

1.5K views • 2 years ago

Dispelling the myths of planning & permitting

1.3K views • 2 years ago

ETC Webinar: Achieving Zero-Carbon Buildings

310 views • 4 months ago

Greg Jackson - Why Heat Pumps Are Already Winning Against Gas Boilers

205 views • 3 months ago

Critical action 6: Effective new business models

212 views • 9 months ago

ETC have been successful at broadening our appearances on traditional Energy/Infrastructure podcasts

Video thumbnails/titles of library updated, new longer form content prioritised to provide new routes to ETC content

ETC are seeking to further broaden our reach by landing spots on mainstream podcasts and working with leading YouTubers

ETC into 2026

The ETC in 2025 has over 50 global members

Energy Transitions Commission

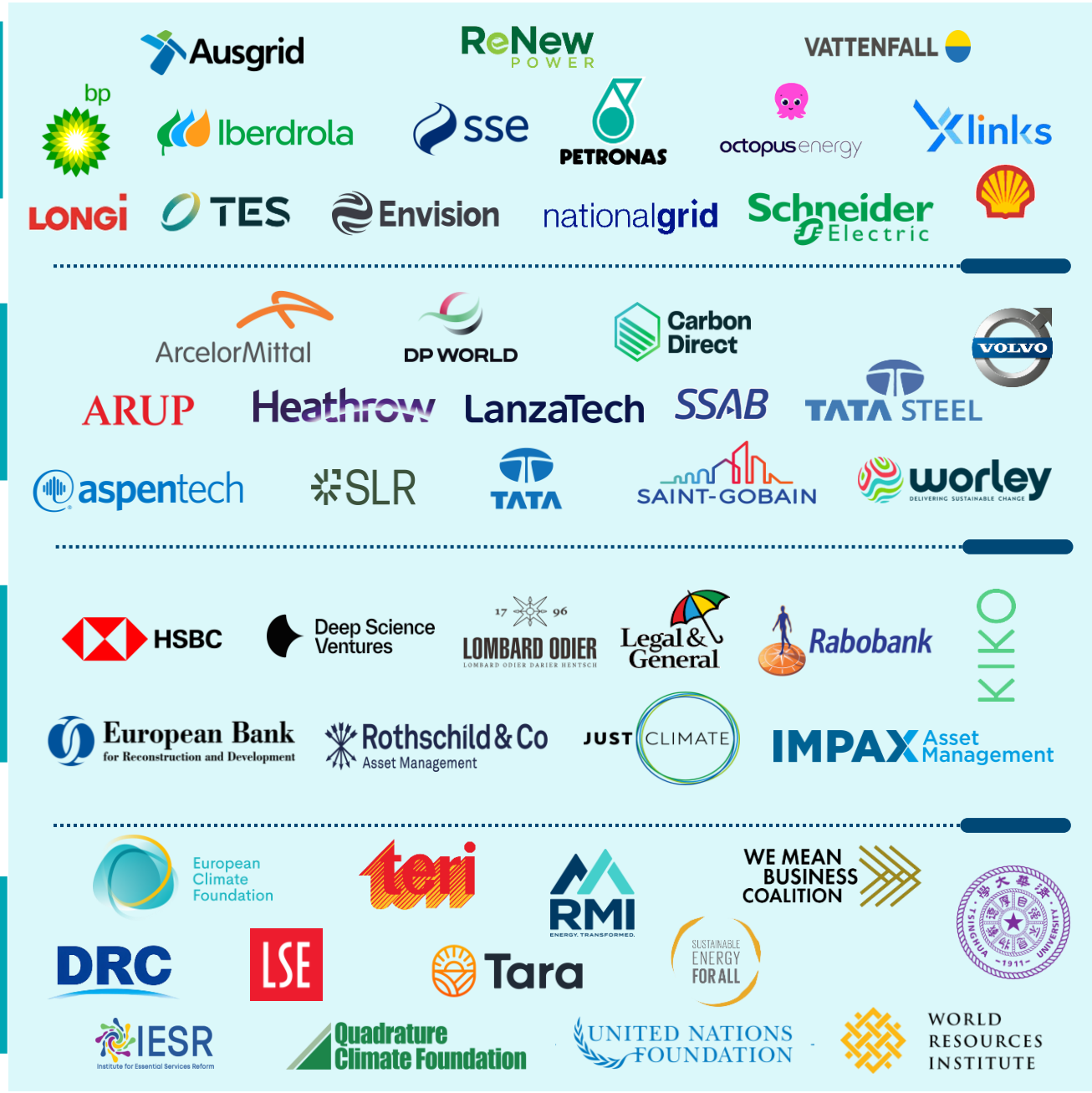
Chair
Adair Turner

Knowledge partners

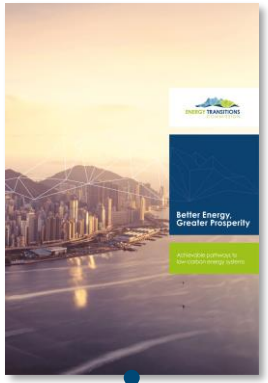
SYSTEMIQ

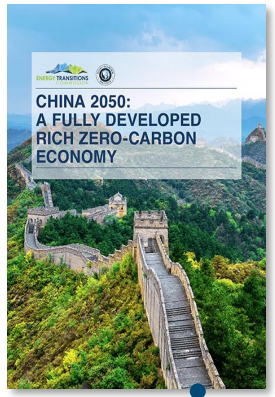
BloombergNEF

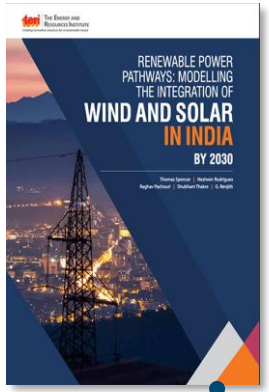
- Energy
- Industry
- Finance
- Civil society

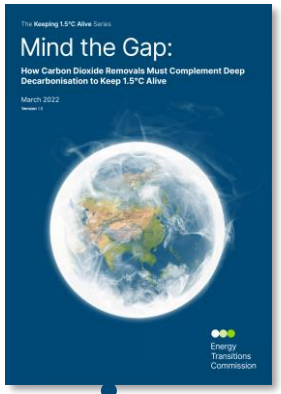


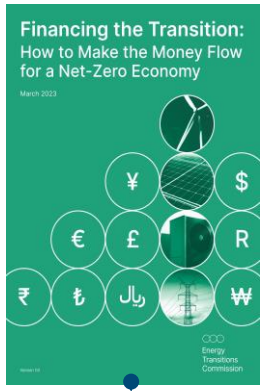
Since 2017 we have built up a library of insights

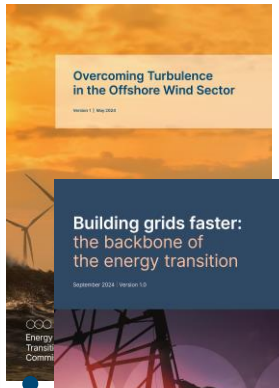


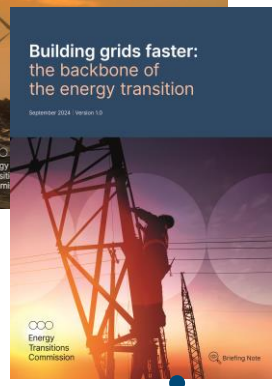


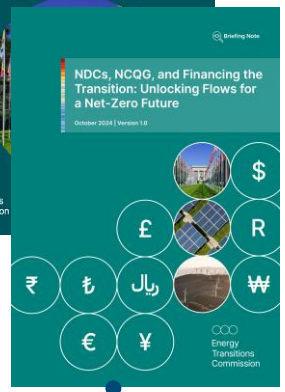




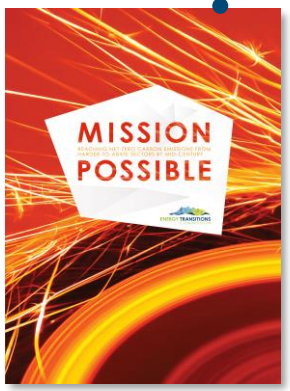


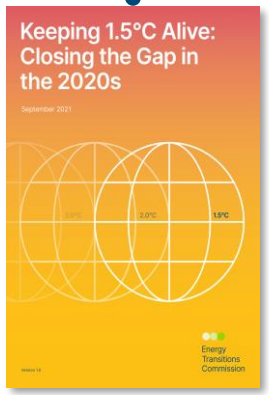


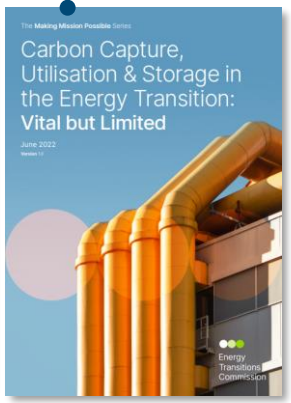


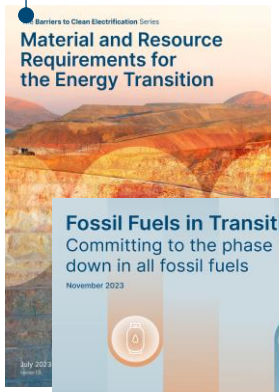


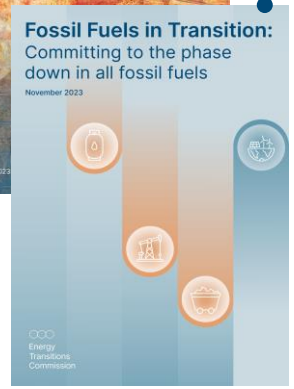
2017 2018 2019 2020 2021 2022 2023 2024 2025

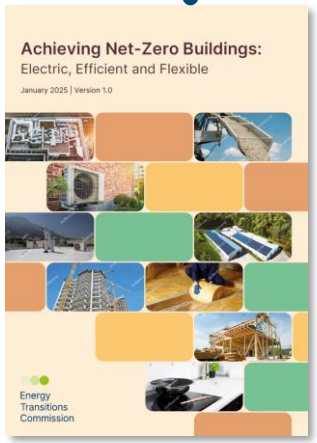












8 Publications covering Power systems transformation, Energy Productivity, Economic impacts, Low carbon molecules…

The ETC's 2025 work programme continued to build these insights…

Building the clean energy system faster

Power systems transformation — *Balancing VRE grids* · *Building & optimizing grids* · *Low-carbon baseload: nuclear & geothermal*

Energy Productivity — *Sector by sector opportunities* · *Road transport* · *Harder-to-abate sectors*

Role of carbon molecules in a zero-emissions economy

Economics of the transition — *Investment, costs & affordability* · *Trade in low-carbon technologies*

Extending our influence in the global climate debate

- Disseminating ETC insights & recommendations
- Leveraging existing knowledge
- Informing the influencers

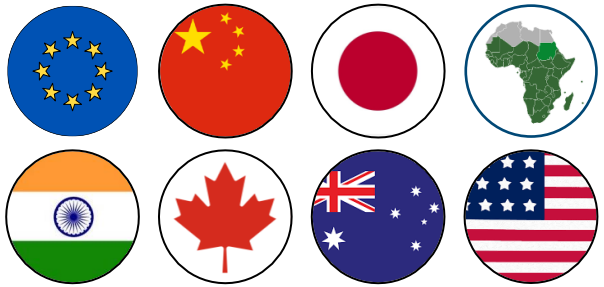
Delivering action through future COPs

- Triple up, double down, phase down
- COP 30, 31

Building the ETC regional network

Expand to new

Enhance networks and local priorities



Share insights & best practice

Supporting the ETC members

Meetings · Analysis · Resources · Events

Supporting the MPP and the ITA

MISSION POSSIBLE PARTNERSHIP

ITA INDUSTRIAL TRANSITION ACCELERATOR

…some of which will take us into 2026

Role of low-carbon baseload: nuclear and geothermal

Complement to ETC's major 2025 power systems report, understanding the value of baseload type technologies to global power systems.

Analysis to cover:

- Latest costs and technology trends (incl. small modular, enhanced geothermal)
- Role in a renewable dominated system – including ability to run flexibly, key drivers of 'value'
- Embodied carbon, water usage and waste disposal

Economics of transition

Crucial evidence base in current net zero debate.

Analysis to cover:

- Cost of transition & who will pay – including mitigation and adaptation considerations
- Inflation, distributional impacts, & bills – including critical focus on role of power market design in passing through low costs of wind/solar
- Employment & local value add impacts

In development

Brasil Energy Transition Initiative

Advancing the conversation on Brazil's decarbonisation trajectory ahead of next year's elections.

- New modelling to reflect latest global insights
- Active stakeholder engagement to ensure buy in beyond NDC

Indonesia Power Transition

Reframing power sector decarbonisation as a means to drive economic growth

Analysis to cover:

- What a solar dominated power generation and grid system would look like
- Implications on industry, GBP, jobs creation and exports

Role of low-carbon baseload will understand value to global power systems

Key area	Nuclear	Geothermal
Overview of technology options, key technical characteristics, and costs	• **Development of technology over time** across regions • **Key technology types** incl. established and emerging technologies and innovations (SMRs, new advanced reactors) • **Costs and key cost driver** across technologies and regions	
Role in clean power systems	• **System value of firm power** – cost comparison across systems: clean firm power vs renewables + flex • **Value of hybrid applications** (including hydrogen production, district heating, industrial heat) • Additional **spillover benefits** of development (e.g. on industrial strategy)	
Deployment barriers	• **Regulatory barriers** (e.g. funding mechanisms, permitting complexity, and risk/liability allocation) • **Technical barriers** (e.g. FOAK vs NOAK risks, construction logistics, fuel supply chains, upfront exploration and drilling risks, high-temperature drilling limits, access to oil and gas technology) • **Social barriers** (e.g. public and community acceptance, siting sensitivities, land-use concerns) • **Environmental impacts** including embodied carbon, water usage, how to manage waste disposal, and decommissioning complexity	
Key factors for success	• **Priority levers** to overcome key regulatory, technical, and social barriers	

Economics of the transition – 3 major areas

Overall consideration: report series (e.g. 3 reports) vs single major report

1

Cost of transition & who will pay

Mitigation costs, adaptation costs, costs of inaction, how to pay (public v private)

2

Inflation, distributional impacts, & bills

Inflation impacts of the transition, cost pass through to consumers in different geographies (Case studies)

including critical focus on role of power market design in passing through low costs of wind/solar

3

Employment & local value add impacts

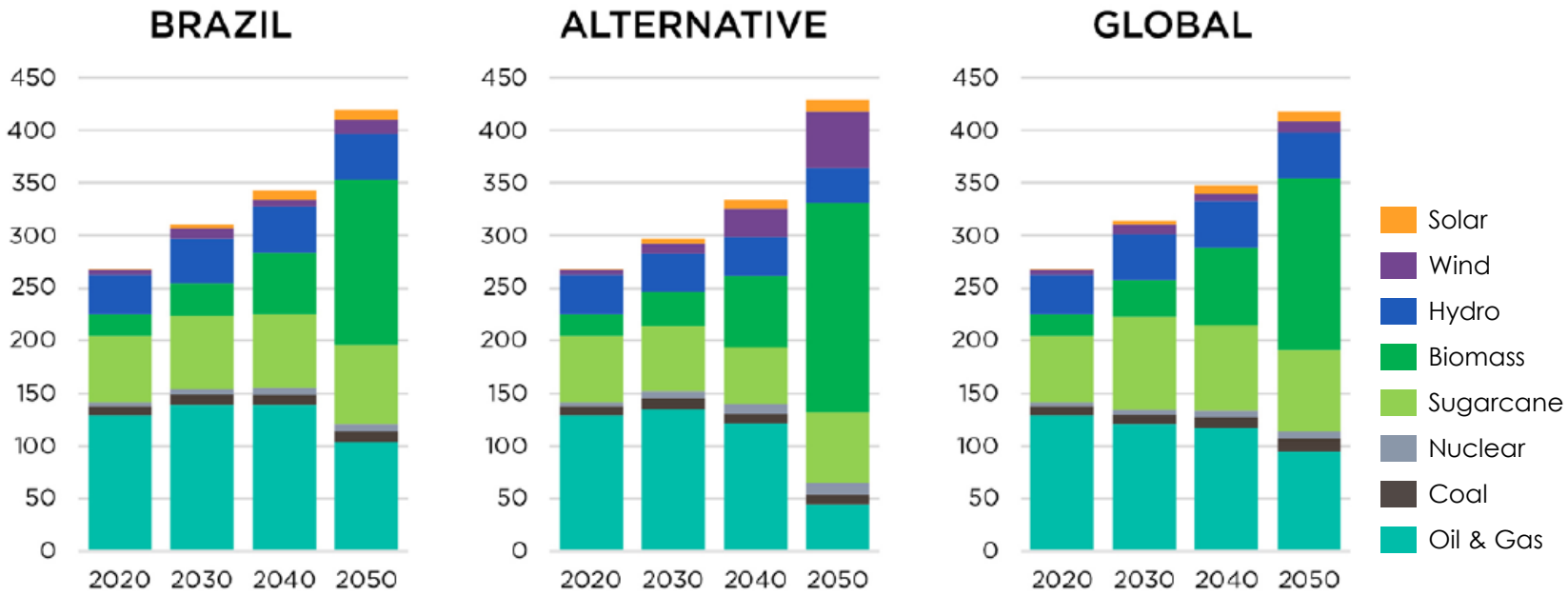
Labour impacts of the transition & local value add

Other spillover benefits out of scope? Health impacts, air pollution etc

Brasil ETI to create buy-in for ambitious pathways ahead of election

Net Zero scenarios marked by large uses of biofuels, continued use of fossil fuels, and heavy reliance on Agriculture, Forestry, and Other Land Use (AFOLU)

Brazil's Primary Energy Use, Mtoe



Reflects current NDCs, achieves Net Zero regardless of other countries with carbon budget of 24.3 $GtCO_2$

Alternative technical route with restrictions around water and CCS availability; carbon budget of 24.9 $GtCO_2$

Focuses on Brazil's contribution to global Net Zero, cuts carbon budget by 40% to 15.3 $GtCO_2$

Potential issues

- 3 distinct yet parallel decarbonisation strategies currently unfolding, the ETC hopes to bridge the gaps with transparent debate
- Brazil's current NDC targets lack societal ownership and broad buy-in

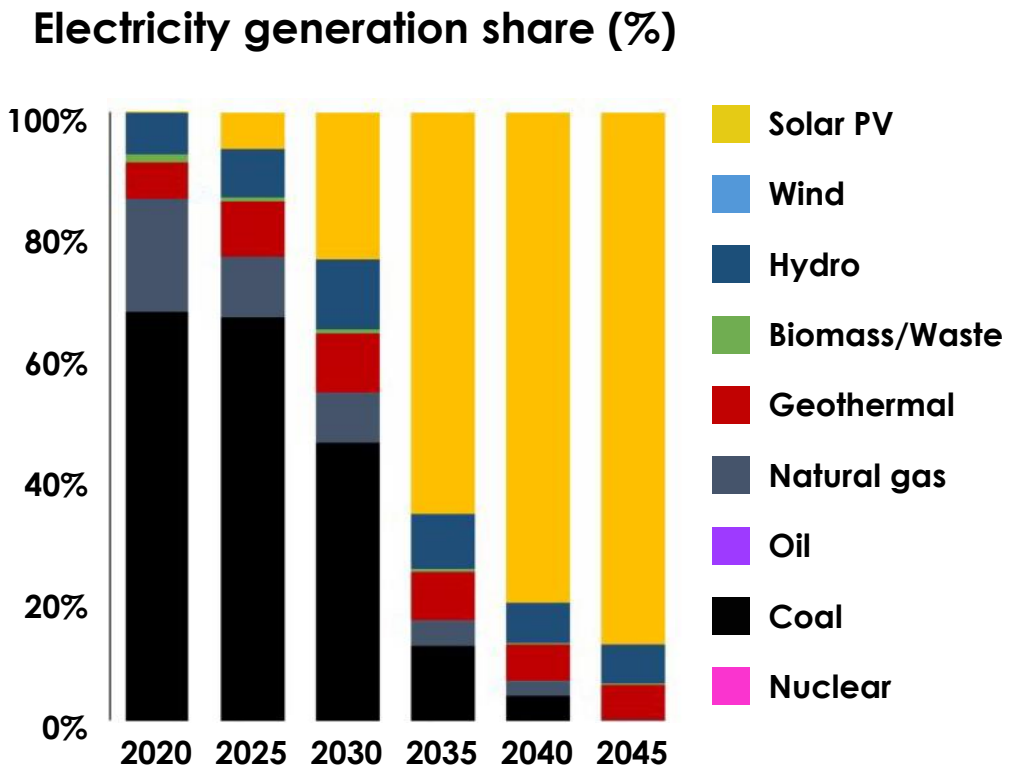
The ETI hopes to bridge the gap to create buy in ahead of election

- Conduct a fully inclusive, transparent study with clearly articulated assumptions
- Unified plan presented to all 2026 presidential candidates
- Establish a broad coalition of stakeholders to drive implementation

Note: passenger road transportation includes urban busses, light commercial vehicles, and 2-/3-wheelers
Source: CEBRI "Carbon Neutrality 2050" (2023); Projeto Decarboost "Uma Estratégia de Descarbonização para uma Economia Brasileira de Zero Carbono Líquido em 2050" (2023)

Indonesia's new government offers opportunity to engage on power transition as an enabler for economic growth

Strong fundamentals for a solar based energy system



Change will require reframing decarbonisation as an economic growth lever

Early, Cross Ministerial Buy-In	• Help ministers **understand and buy into key assumptions** around how the transition will facilitate economic goals • **Gain critical mass** to support the effort and ensure adoption
Focus on Socio-Economic Impact	• **Reframe decarbonisation as an enabler for economic growth and economic security** • Quantify how decarbonisation also **drives net growth exports and jobs**
Integrated Systems Answer	• Robust transition pathway with **key enablers** • **A comprehensive, aligned, and current analysis of solar-dominated systems that is publicly accessible does not exist**

New debates on Net-Zero mean more, not less, ETC type efforts are required. The challenge will be to remain distinctive and focus towards implementation.

Focus shift towards implementation

	Analyses	Progress tracking	Mobilising decision-makers towards implementation
Global	IRENA, IEA, BloombergNEF, EMBER		RACE TO ZERO
Regional	Climate Policy Initiative, RMI, World Resources Institute		Mission Innovation, Green Hydrogen Catapult, Breakthrough Agenda, IEA, IRENA, Marrakech Partnership
Sectoral		Mission Possible Partnership	

Proposal for evolution: more agile analysis & increased engagement

ETC in 2025 – 15 analytical outputs:

3 major reports (100 page +):
Buildings, power, molecules

4 insights briefings (c. 50 pages):
Nuclear/geothermal, long distance transmission, energy productivity, road transport

5 briefing notes/blogs (5-20 pages):
Trade, carbon credits, power demand growth, demand-side flex, bio

2x regional insights:
India (AgriPV), Indonesia (energy system)

ETC in 2026 ~ 6-11 analytical outputs?

1 major report:
State of the global energy transition

~5 insights briefings (c. 50 pages):
e.g. economics of the transition x3, hydrogen, power

~5 briefing notes/blogs (5-20 pages):
to be agreed

Space for increased regional work and engagement?

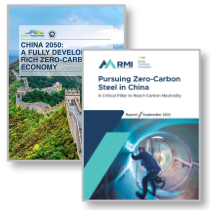
CONTINUING TO EVOLVE AND REFINE OUR THREE PILLAR COMMUNICATIONS STRATEGY

Disseminating ETC insights & recommendations

Leveraging existing knowledge

Informing the influencers

The ETC's regional network gives us a good basis for engagement…

Est.	2017	2018	2018	2019	2020	2021	2021	2022	2023	2025
Knowledge Partner(s)	teri, RMI	Energy Foundation 能源基金会, Tsinghua University, RMI	SYSTEMIQ, European Climate Foundation, Corporate Leaders Group Europe	Mission Possible Partnership, Climateworks Centre	Duke Nicholas Institute for Energy, Environment & Sustainability, World Resources Institute, RMI	The Transition Accelerator	東京大学未来ビジョン研究センター Institute for Future Initiatives The University of Tokyo	World Resources Institute	IESR Institute for Essential Services Reform	SYSTEMIQ
Initiative	Energy Transitions India			Australian Industry Energy Transitions Initiative	Energy Pathways USA	Electrifying Canada	Center for Global Commons	African Energy Dialogues	New energy systems analysis (in development)	Brazil ETI
Insights										In-progress

…but we could go even further in our engagement efforts

Globally

And in key regions

EUSEW 2025 Young Energy Ambassadors

Hypothesis for discussion – more agile analysis & increased engagement

Robust analysis across ETC strengths in 3 core focus areas

FOCUS AREAS:	General / emissions / economics / priority areas	Clean electrification	Molecules
THE FACTS	▪ The economics of transition ▪ Jobs, growth, competitiveness	▪ Role of low-carbon baseload ▪ Consumer bill impacts/market design	▪ Hydrogen: re-assessing the fundamentals, 4 years on. Lessons learned etc.
THE 'UNBLOCKERS'	▪ Policy recommendations for low cost consumer electricity in Europe	▪ *Example: Priorities for power markets in South East Asia* ▪ *Example: Removing red tape to accelerate behind-the-meter energy*	▪ *Example: Accelerating carbon capture in Europe*

THE NARRATIVE

A comprehensive state of the transition campaign

Using the ETC's existing global & regional connections and iniatitives to target policymakers and business in all key regions

To be further defined this year

Disseminating ETC insights & recommendations

Leveraging existing knowledge

Informing the influencers

Feeding into our overall communications strategy

Emergence of Artificial Intelligence presents opportunities for ETC

Energy Transitions Commission

The ETC is a global energy transition thinktank and member coalition that produces analysis on long term energy transition trends. How will Artificial Intelligence (AI) disrupt our organisation?

Copilot

Artificial Intelligence (AI) is poised to significantly disrupt and enhance the work of the **Energy Transitions Commission (ETC)** in several strategic and operational dimensions.

- **Enhance ETC's research capabilities** by rapidly processing large datasets, generating predictive models, and synthesizing insights from global literature
- **Transform stakeholder engagement** through personalized insights, interactive tools, and multilingual accessibility that broaden the reach and impact of ETC's work.
- **Enhance secretariat efficiency** in key areas such as publications.
- However, **ETC must navigate key risks** such as algorithmic bias, over-reliance on automation, and data governance to ensure responsible and transparent AI use.

Questions for ETC:

- What parts of our research pipeline are most data-intensive or repetitive?
- How can we use AI to democratise access to our insights?
- What governance structures do we need to ensure responsible AI use?

Note: this slide was generated using insights from M365 Copilot, but the outputs were further refined by the ETC team.

Questions for discussion

- **Does proposed shift in analysis towards increased engagement make sense?**
- **How to ensure ETC engagement is additional?**
- **How should ETC best work with Artificial Intelligence tools?**