



Energy
Transitions
Commission

Protecting Paris: accelerating clean electrification for a “well below 2°C” world

ETC Representatives Meeting
14 May 2026

Plan for the day

Agenda item	Presentation time	Discussion time
Key opportunities to accelerate clean electrification	10'	
China: finally decreasing coal dependency?	5'	
India: unparallel potential for solar	15'	30'
Indonesia: spotlight on ETC's work with IESR	10'	
Solarizing Africa: opportunities to leapfrog to clean electrification	10'	
Europe: decreasing reliance on gas	5'	35'



Agenda

- **Key opportunities to accelerate clean electrification**

- China: finally decreasing coal dependency?
- India: unparalleled potential for solar
- Indonesia: spotlight on ETC's work with IESR
- Solarizing Africa: opportunities to leapfrog to clean electrification
- Europe: decreasing reliance on gas
- Next steps

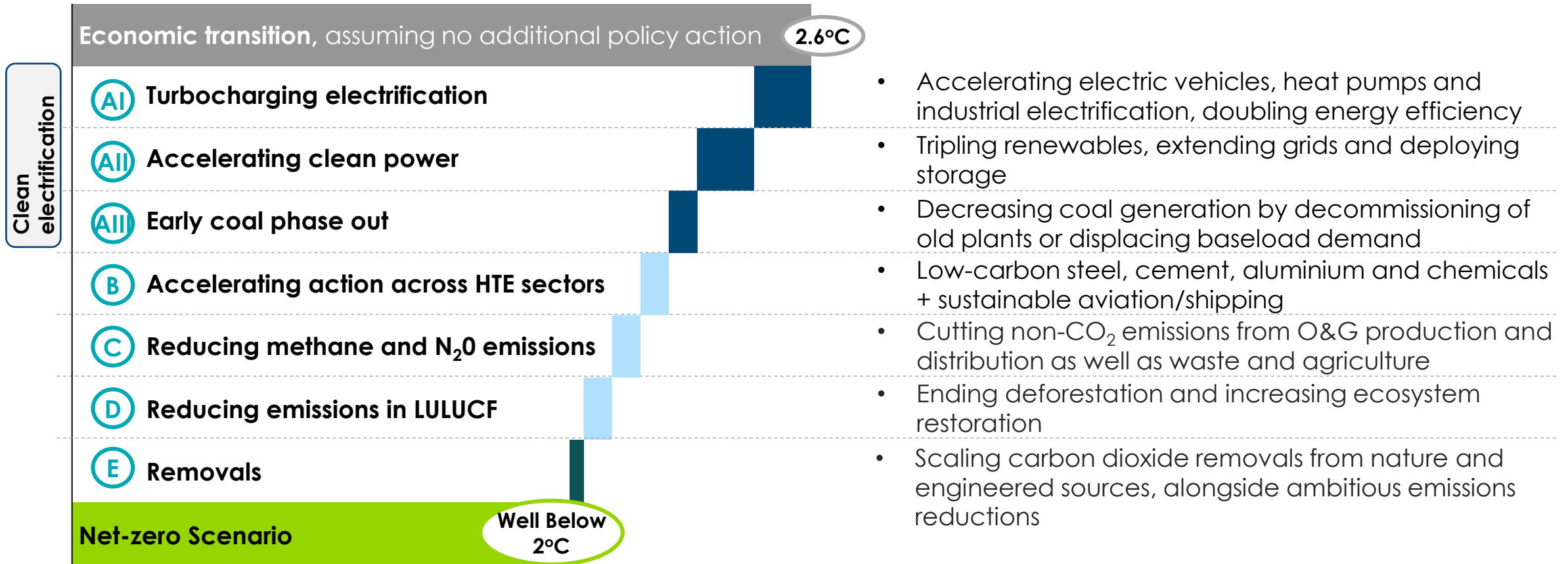


Protecting Paris work identifies the core 'blocks' of emissions reductions that are needed to deliver temperatures closer to Paris objectives

Illustrative

Peak warming in the 21st century and key mitigation areas
°C

Key levers of change



Note: LULUCF = Land Use, Land Use Change and Forestry

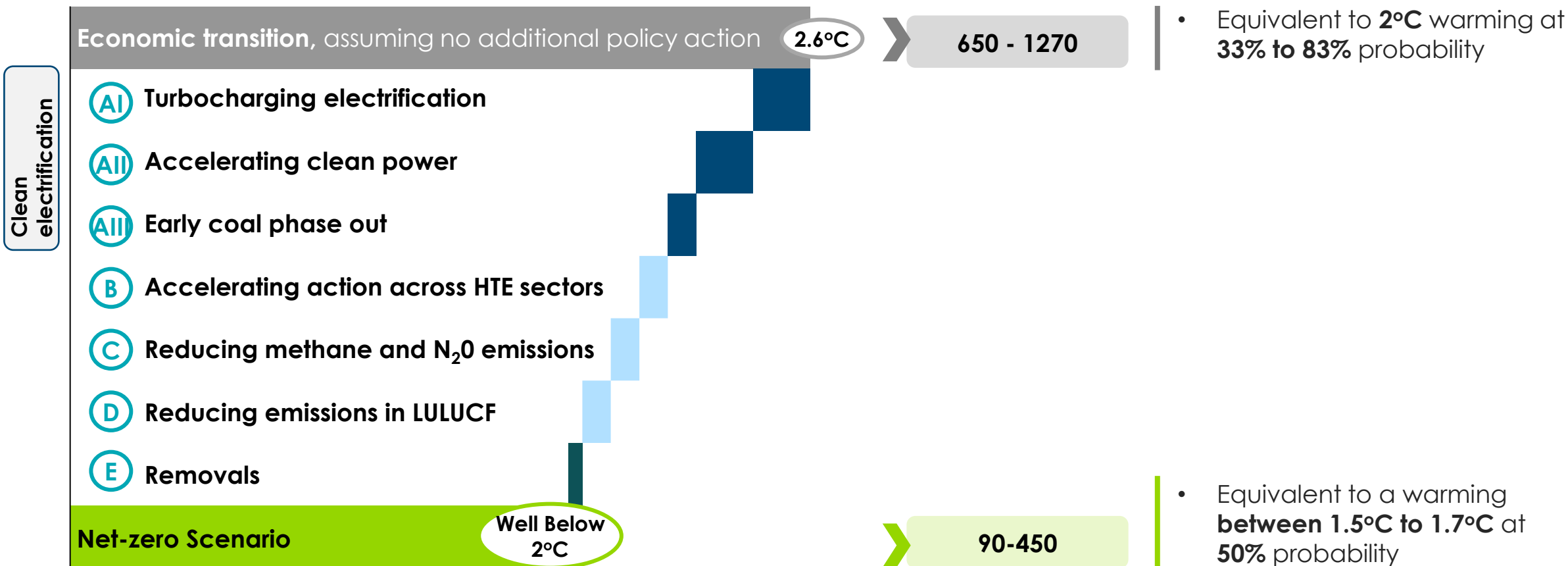
As a first step, we are going to assess the key mitigation areas in terms of cumulative CO₂

Peak warming in the 21st century and key mitigation areas

°C

Comparable remaining carbon budget at start of 2026

Cumulative GtCO₂



Note: Carbon budgets estimated based on IPCC's AR6

Source: Systemiq analysis for ETC; BNEF New Energy Outlook 2025; ESSD (2025) Indicators of Global Climate Change 2024: annual update of key indicators of the state of the climate system and human influence

We will anchor our energy analysis on BNEF's reference scenarios, while benchmarking against other scenarios

Preliminary

	Scenario	New Scenarios from BNEF to be released May 2026	Pathway Type	Net-Zero 2050?	Peak temperature	Included Sectors			Emissions Scope		
						Energy Use ¹	AFOLU ²	Removals	CO ₂	CH ₄	N ₂ O
Reference	BNEF NEO 2025 Economic Transition		Cost based technology change with no further policy support for the energy transition beyond existing measures		2.6°C at 67% probability	●	○	○	●	○	○
	BNEF NEO 2024 Net Zero		Normative scenario of an achievable stretch to get back on track to net zero by 2050 by meeting sectorial carbon budgets	✓	1.75°C at 67% probability	●	○	○	●	○	○
	IEA WEO 2025 Stated Policies		An exploratory scenario that models a dynamic reading of today's policy settings		2.5°C at 50% probability	●	○	●	●	●	●
	IEA WEO 2025 Net Zero		A normative scenario for a global pathway to be aligned with a 1.5°C warming with limited overshoot	✓	1.65°C at 50% probability	●	○	●	●	●	●
	ETC Accelerated But Clearly Feasible		A technically and economically feasible scenario that would require more forceful policy support than current in place	✓	1.7°C at 50% probability	●	○	●	●	●	○
TBD – to be included	BP 2025 Below 2°C Trajectory		Scenario assuming significant tightening of climate policies and shift in societal behaviour and preferences supporting efficiency		2.0°C at 67% probability	●	○	○	●	●	●
	Shell 2026 Energy Security - Horizon		Normative scenario aiming for net-zero emissions by 2050 with increased climate-friendly policies	✓	1.7°C at 50% probability	●	●	●	●	●	●
	NGFS Orderly Net-Zero 2050		Scenario assuming climate policies introduced early and become gradually more stringent - physical and transition risks limited	✓	<1.7°C at 50% probability	●	●	●	●	●	●

Other scenarios to consider: S&P's IRENA's; Rystad's; The Food and Land Use Coalition's (for AFOLU)

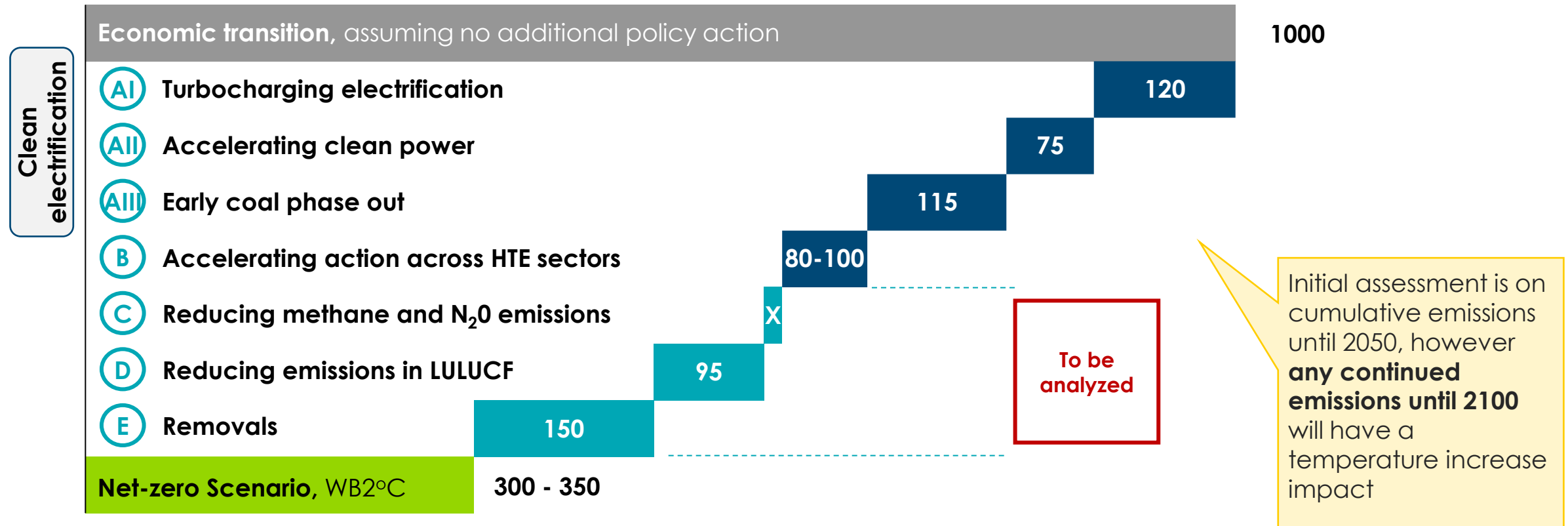
Source: Systemiq analysis for ETC; BNEF New Energy Outlook 2025; IEA (2025) World Energy Outlook; BP (2025) Energy Outlook; Shell (2025) The 2026 Energy Security Scenarios; NGFS, Scenarios Portal [Accessed January 2026]

Using BNEF's scenarios, clean electrification is half of the opportunity for a faster transition consistent with Paris agreement levels of well below 2°C

Preliminary

Key mitigation areas

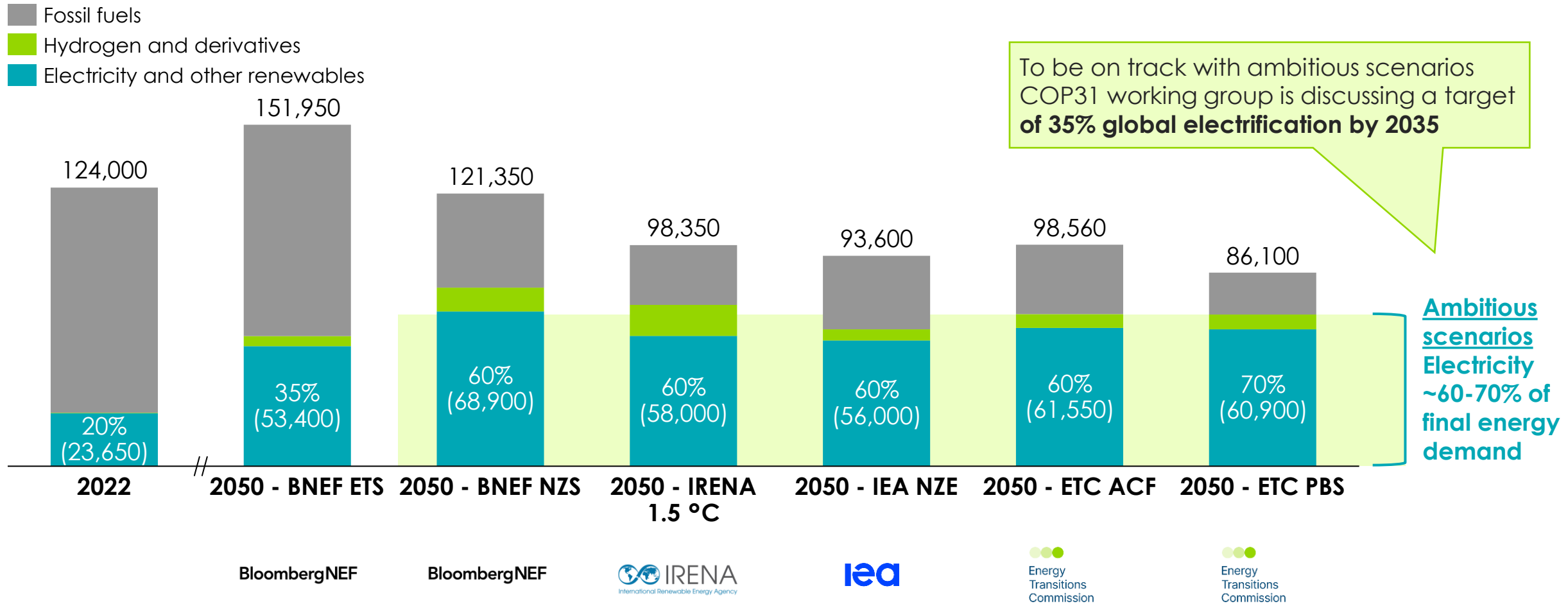
Cumulative GtCO₂ 2026-2050



The Future is Electric: electricity demand more than doubles by 2050 in net-zero scenarios

Global final energy demand by energy source and scenario

TWh



BloombergNEF

BloombergNEF

IRENA
International Renewable Energy Agency

iea

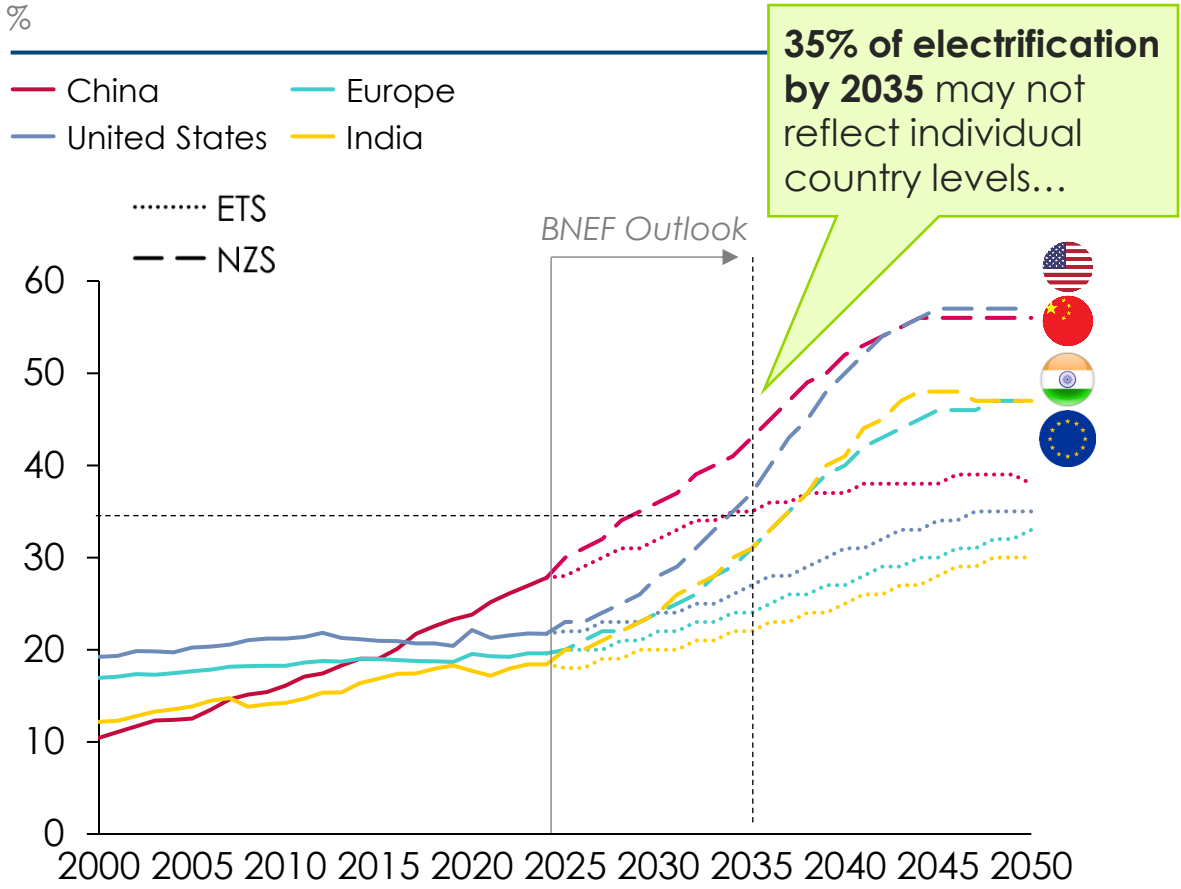
Energy Transitions Commission

Energy Transitions Commission

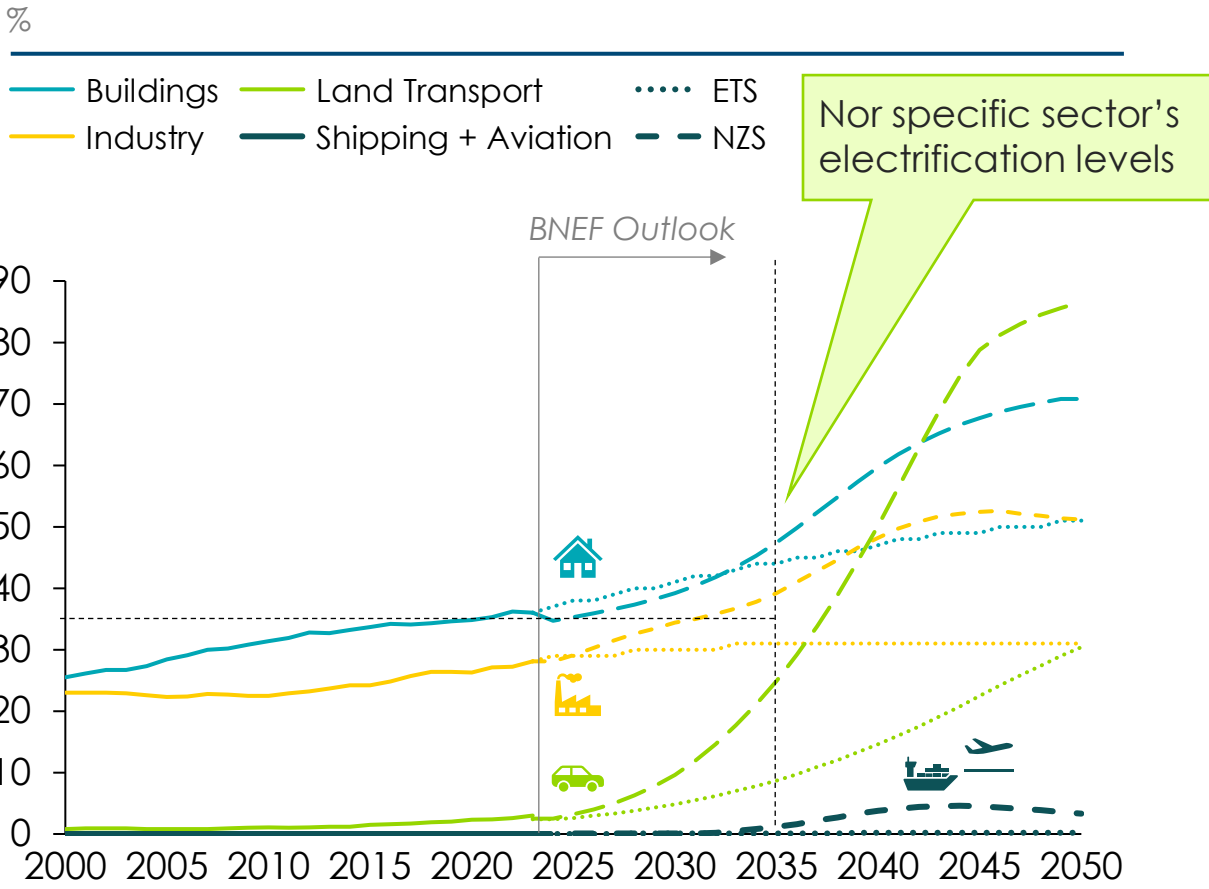
Note: ACF = Accelerated but Clearly Feasible Scenario; PBS = Possible but Stretching Scenario; NZS = Net Zero Scenario; NZE = Net Zero Emissions; Heat is included in "electricity and other renewables" in the BNEF NZS scenario. Source: ETC (2025), *Carbon in an electrified future: Technologies, trade-offs and pathways*; BNEF (2025), *New Energy Outlook*; IEA (2025), *World Energy Outlook 2025*; IRENA (2024), *World Energy Transition Outlook*. Confidential

However, electrification levels will differ by country and sector, with close to 50% shares attainable across major economies and sectors by 2050

Electricity share of total final energy consumption by country



Electricity share of total final energy consumption by sector

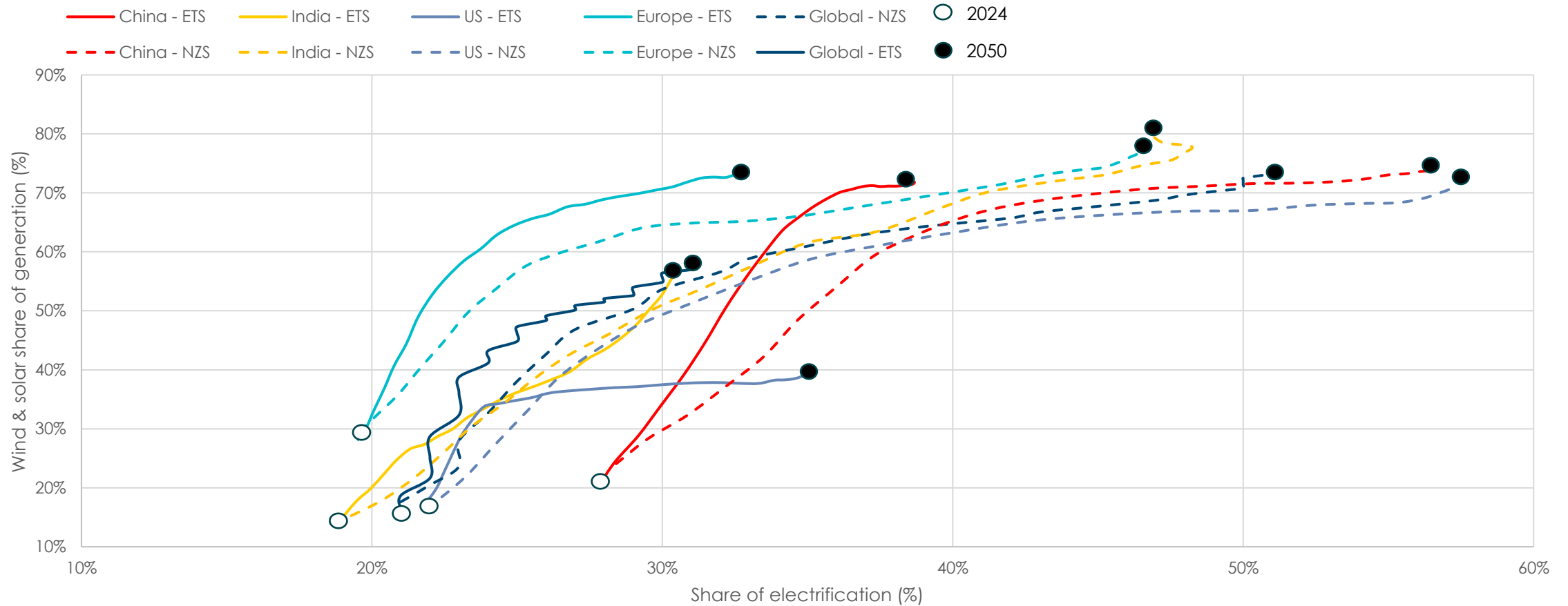


Notes: Historic data is from BNEF's ETS; Land transportation includes road and rail transport. Source: (2025) World Energy Outlook 2025, BNEF (2025), New Energy Outlook

Grid decarbonisation is the essential companion to clean electrification, wind and solar will drive this

Wind & solar vs electrification shares from 2024-2050, global

Wind & solar share of generation (%)

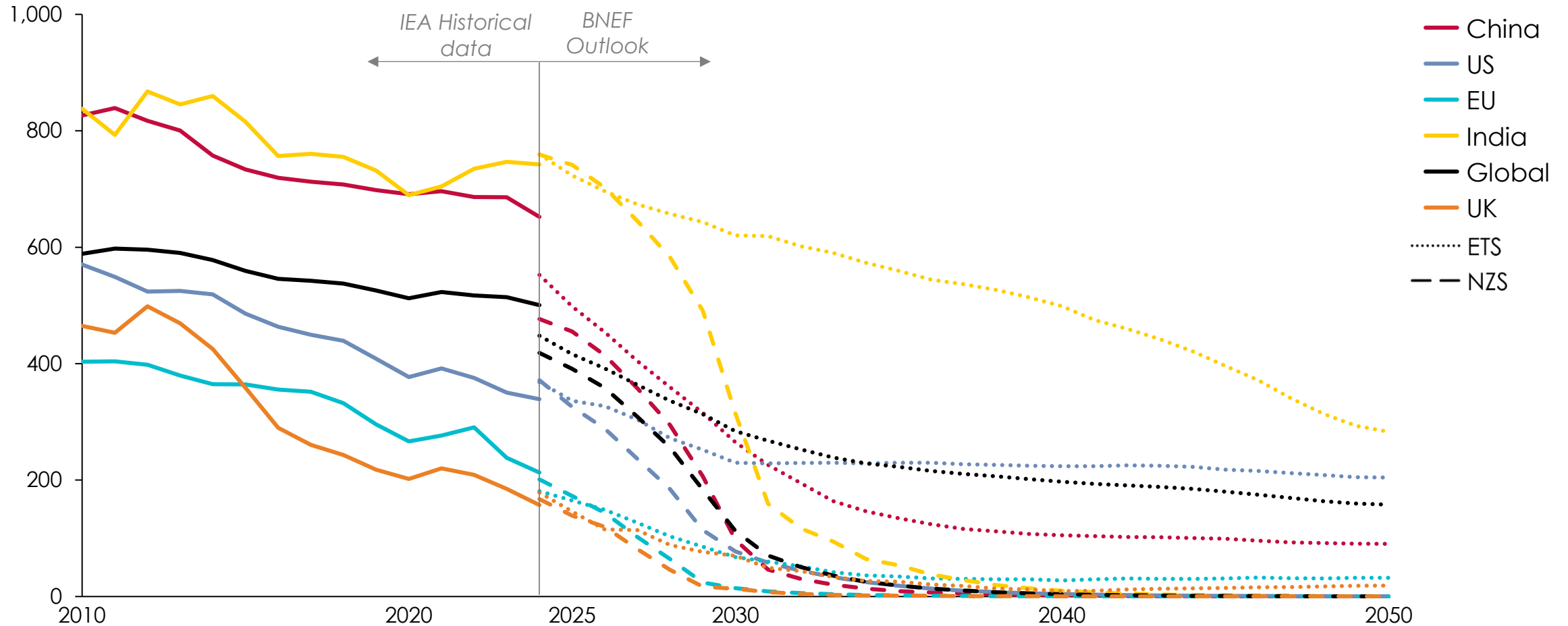


Note: curves show the incremental change in shares of wind & solar and electricity over the selected time period.

Higher shares of clean electricity are necessary to drastically drive grid emissivity down by almost 95% by 2035 to be “well below 2°C” consistent

Grid emissivity

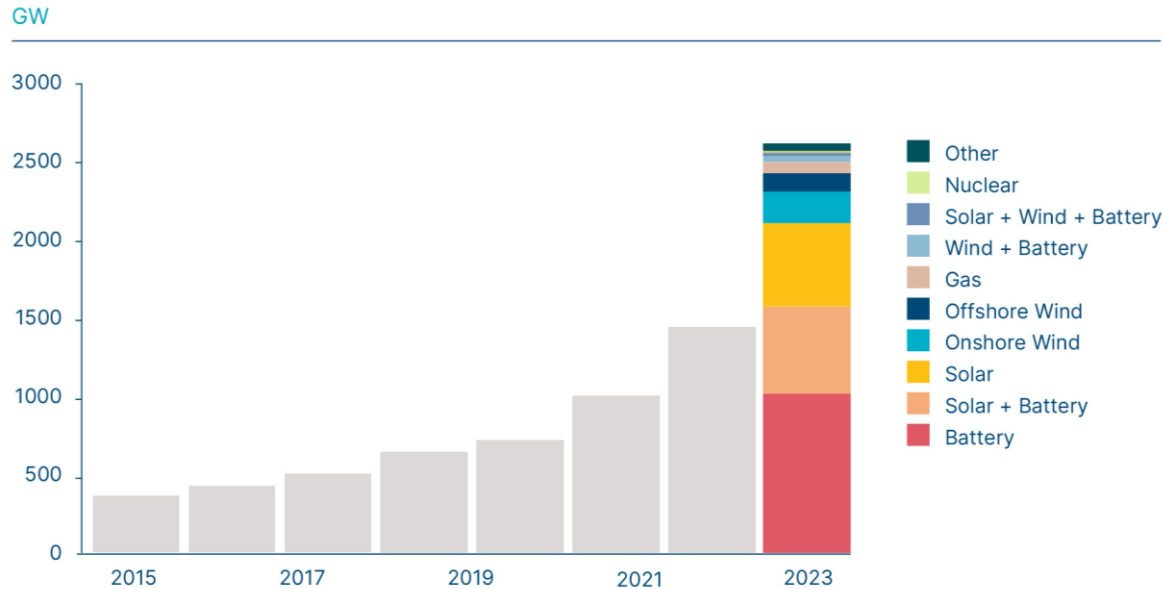
gCO_{2eq}/kWh



Grids is currently the biggest bottleneck for renewables scale-up – building grids faster (or making them more flexible) can reduce connection queues

Case Study: US connection queue

US grid connection queue sizes (2015-2023)

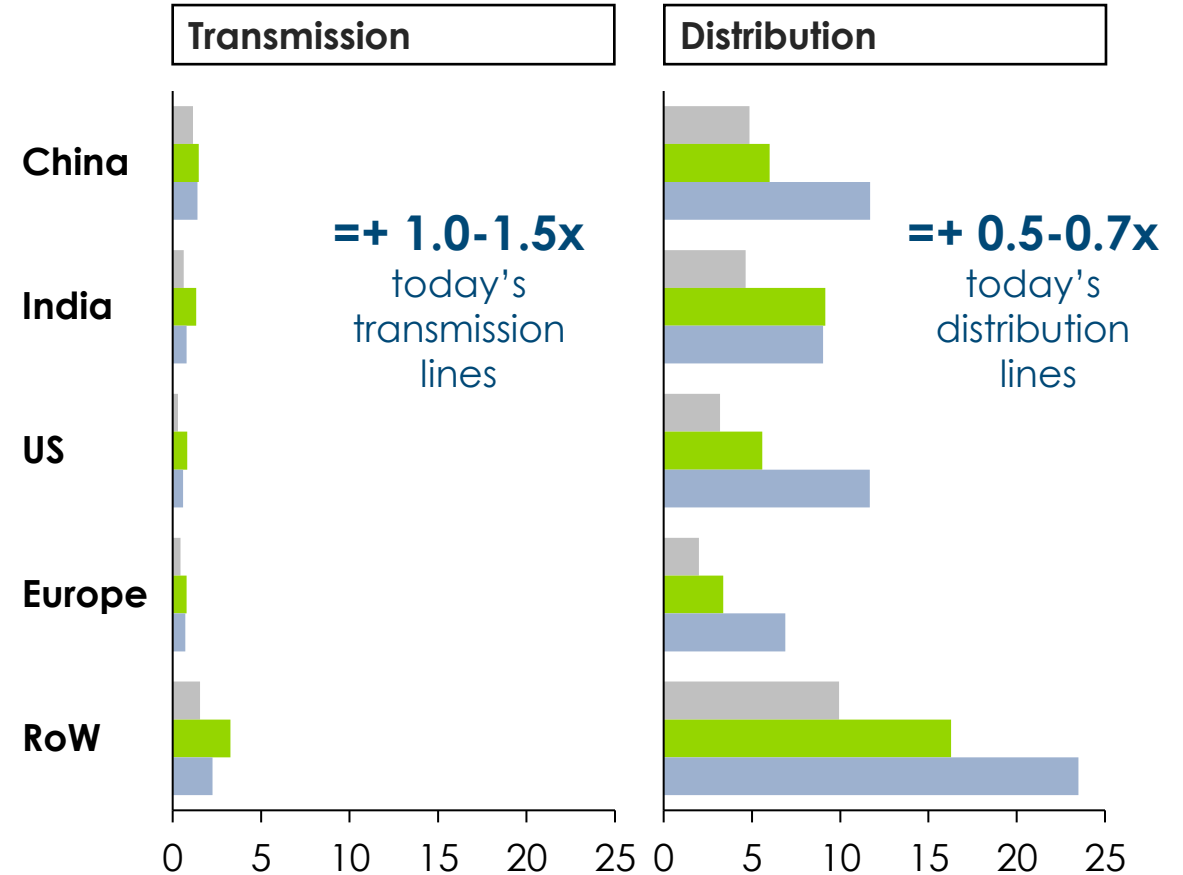


Projects in queues are growing, in 2023 the US had 1450 GW of wind and solar capacity in queue (equal to 50% current global wind and solar capacity).

Projected grid build in selected regions, 2024-2050

Million km

ETS NZS Today

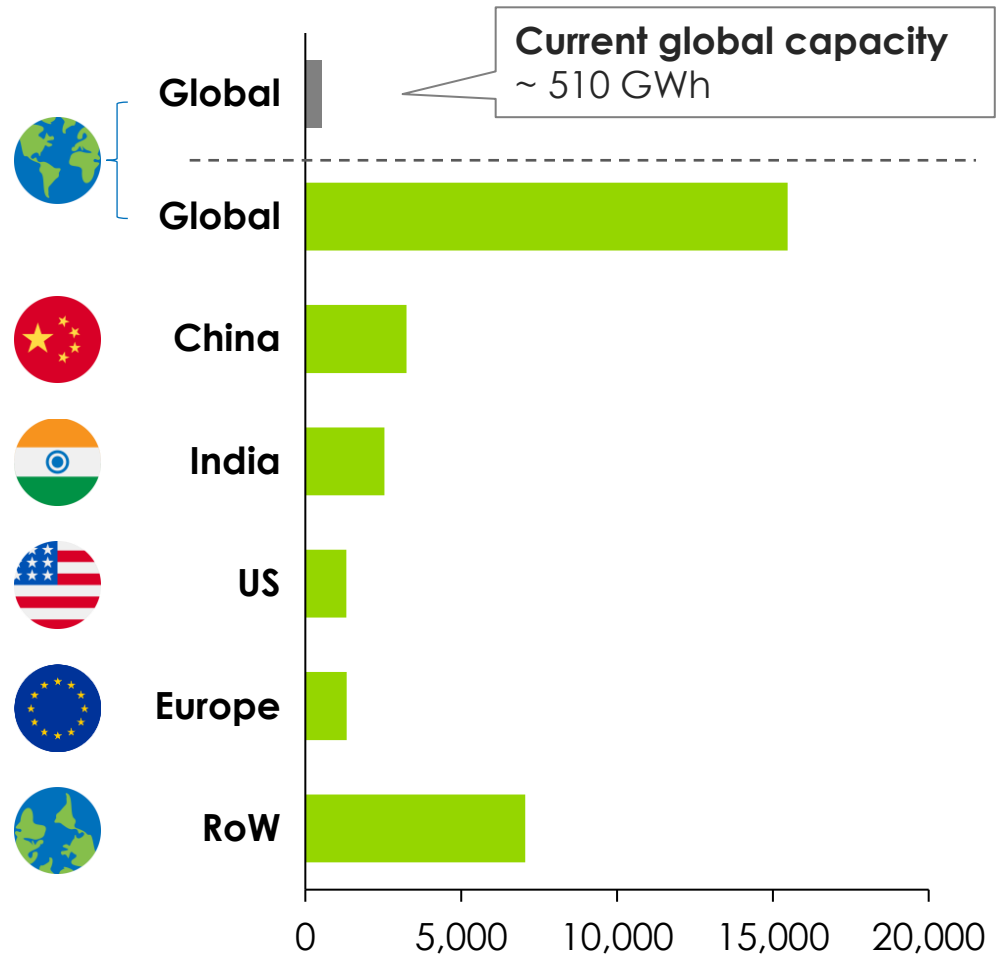


Storage needs to scale with renewables – tripling the global ratio of storage for every installed GW of either solar or wind by 2050

Battery capacity additions, 2024-2050

GWh

■ NZS ■ Today



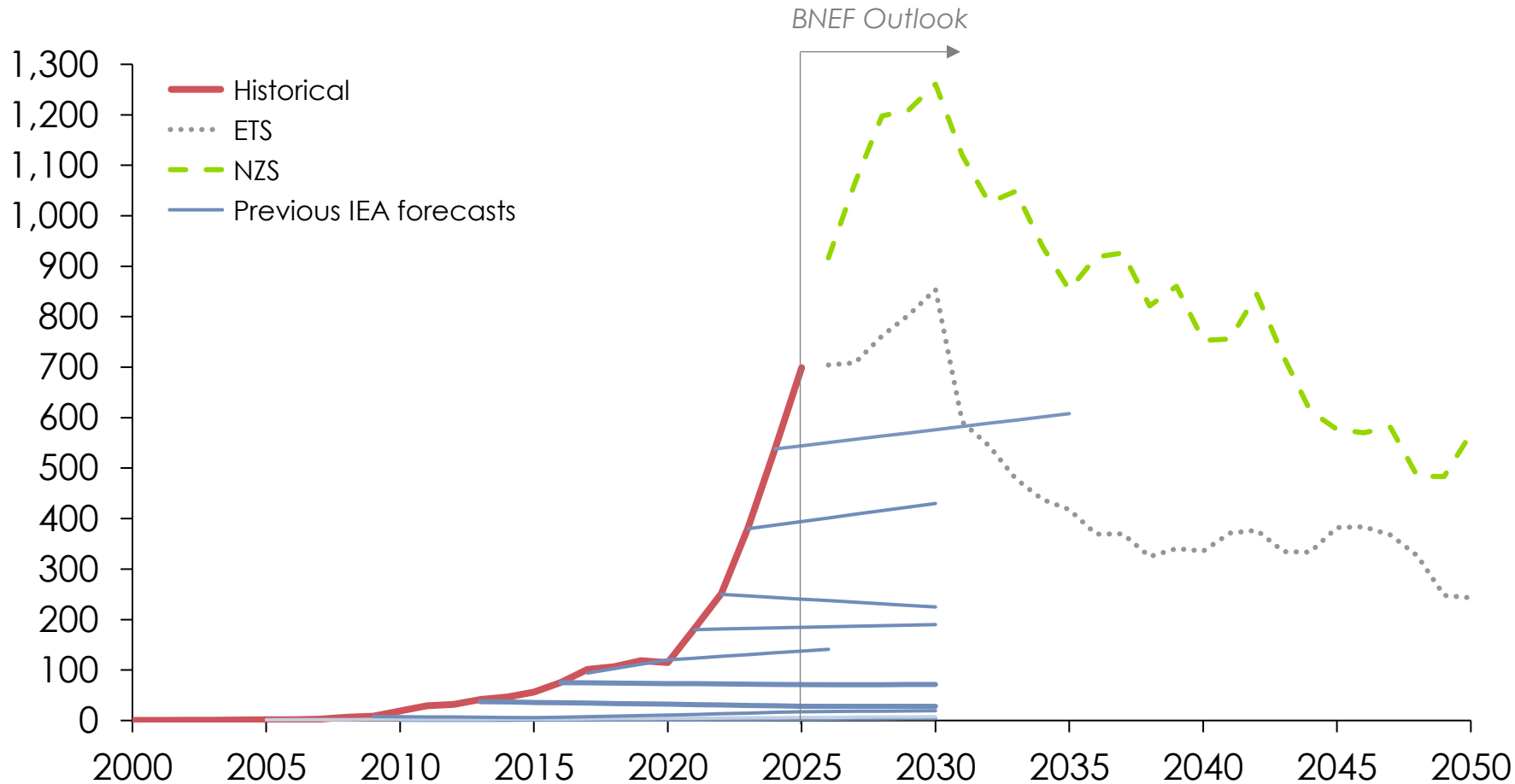
Storage / RES Installed capacity	2024	BNEF NZS	
		2035	2050
Global	4%	16%	13%
China	4%	15%	10%
India	1%	16%	15%
US	8%	16%	10%
Europe	4%	14%	11%
RoW	2%	17%	16%

Notes: Installed RES capacity includes small-and utility-scale solar PV and onshore + offshore wind;

With solar installations growing at a rate of 77% p.a. in the last 5 years, ~240GW of annual added capacity by 2050 likely an underestimate

Annual solar PV installations

GW



- BNEF ETS scenarios forecasts a **glut of solar capacity by early 2030**: explosive growth leading to idle plants – i.e. stranded business case for solar development in many markets
- Batteries trend towards lower utilization due to market saturation - **flatten price volatility compresses the arbitrage window** that makes the current business models of storage bankable
- **Flexible demand** could be a key driver to unlock better solar integration
- Noting that distributed solar potential is ~ **600 GW p.y.**



Source: BNEF (2025) New Energy Outlook

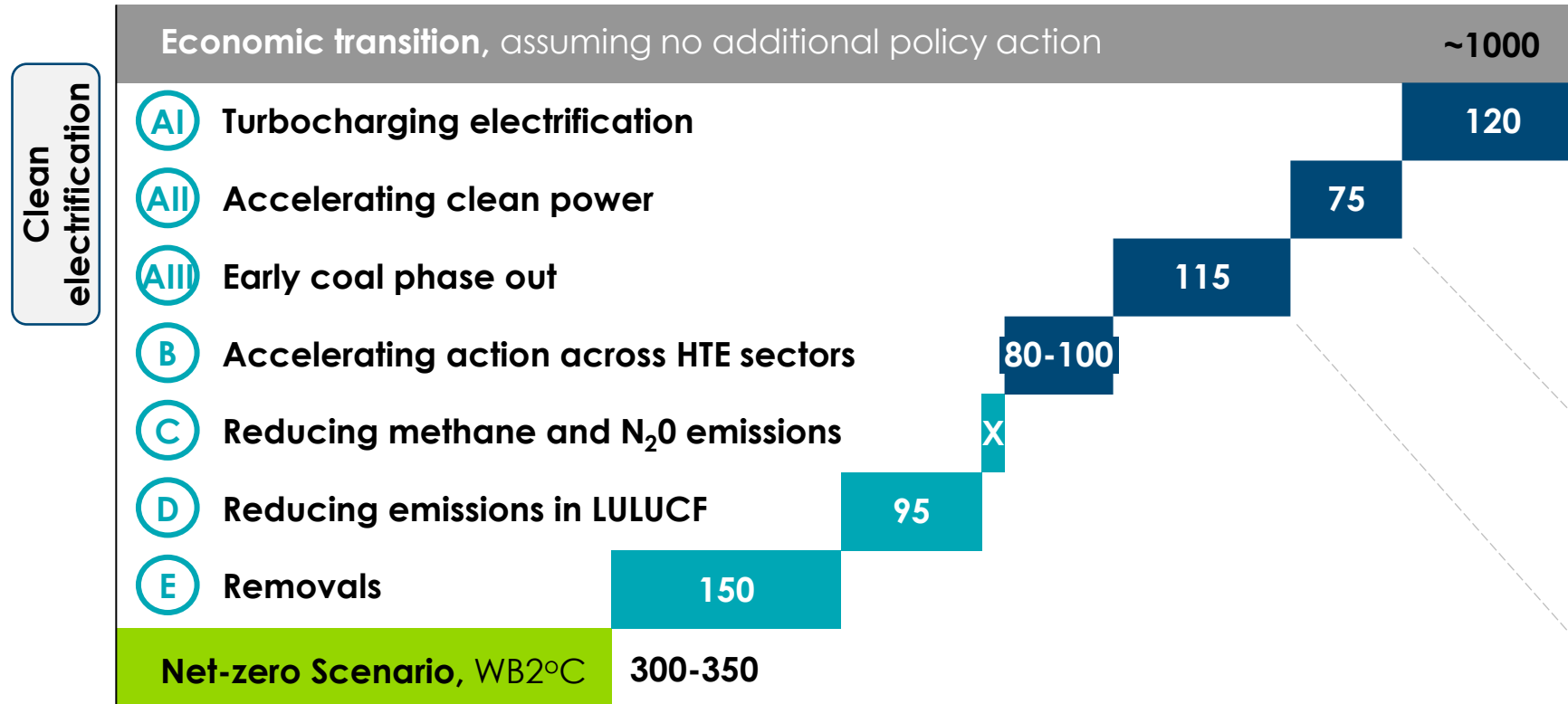
Turbocharging clean electrification will require uptake of end-use technologies to go hand in hand with grid decarbonisation

Revised

Key mitigation areas

Cumulative GtCO₂ 2025-2050

Key insights



- **EVs** are scaling fast, but faster uptake is still essential
- **Heat pumps** are the key deployable technology for heating electrification in buildings and light industry
- Clean electricity essential for electrification. Will also require **grids, storage, flexibility and revenue models** that can sustain investment
- **Regional pathways for coal** and implications will be addressed in the country and regional chapters that follow



Agenda

- Key opportunities to accelerate clean electrification
- **China: finally decreasing coal dependency?**
- India: unparalleled potential for solar
- Indonesia: spotlight on ETC's work with IESR
- Solarizing Africa: opportunities to leapfrog to clean electrification
- Europe: decreasing reliance on gas
- Next steps



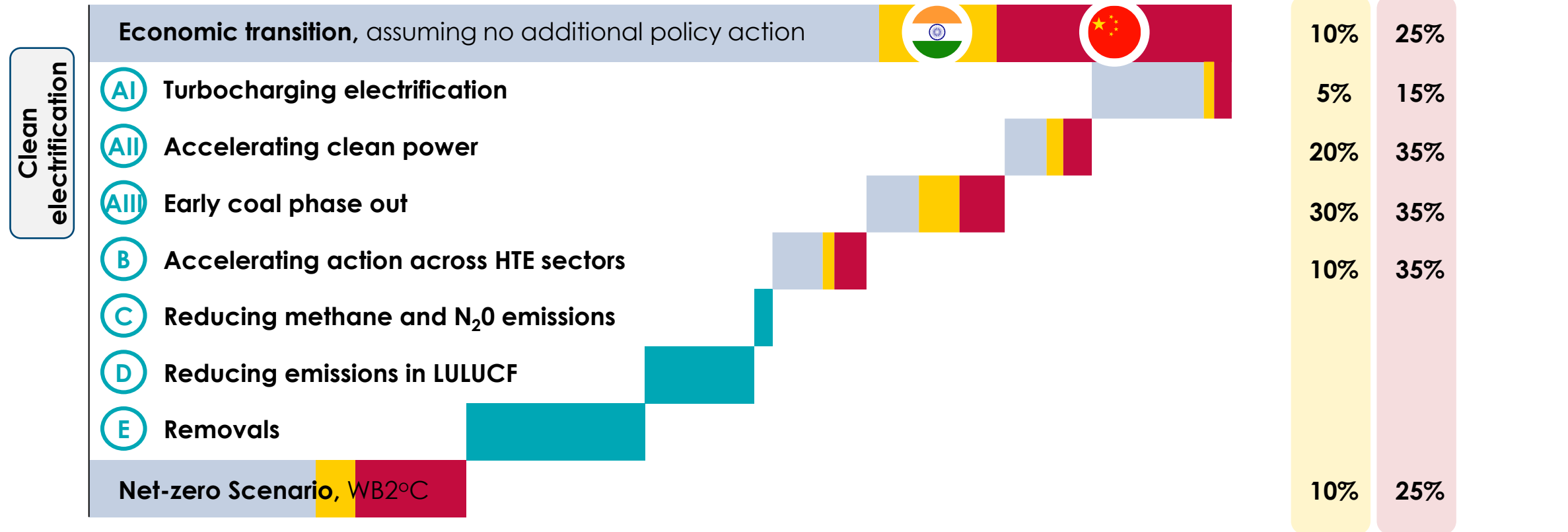
China and India stand out as decisive geographies for the world to be able to stay “well below 2°C”

Preliminary

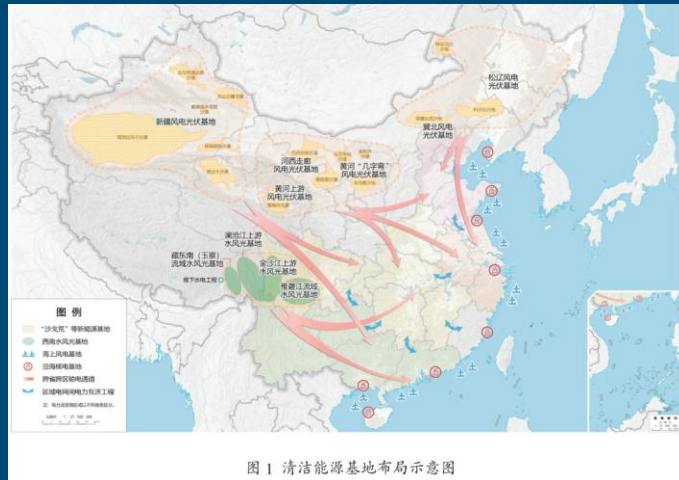
Key mitigation areas

Cumulative GtCO₂ 2025-2050

Relative size within block
% of global



China's 15th Five-Year Plan doubles down on clean power expansion, but stops short of a coal phase-out



Map of clean energy bases and electricity transmission routes in China's 15th Five-Year Plan

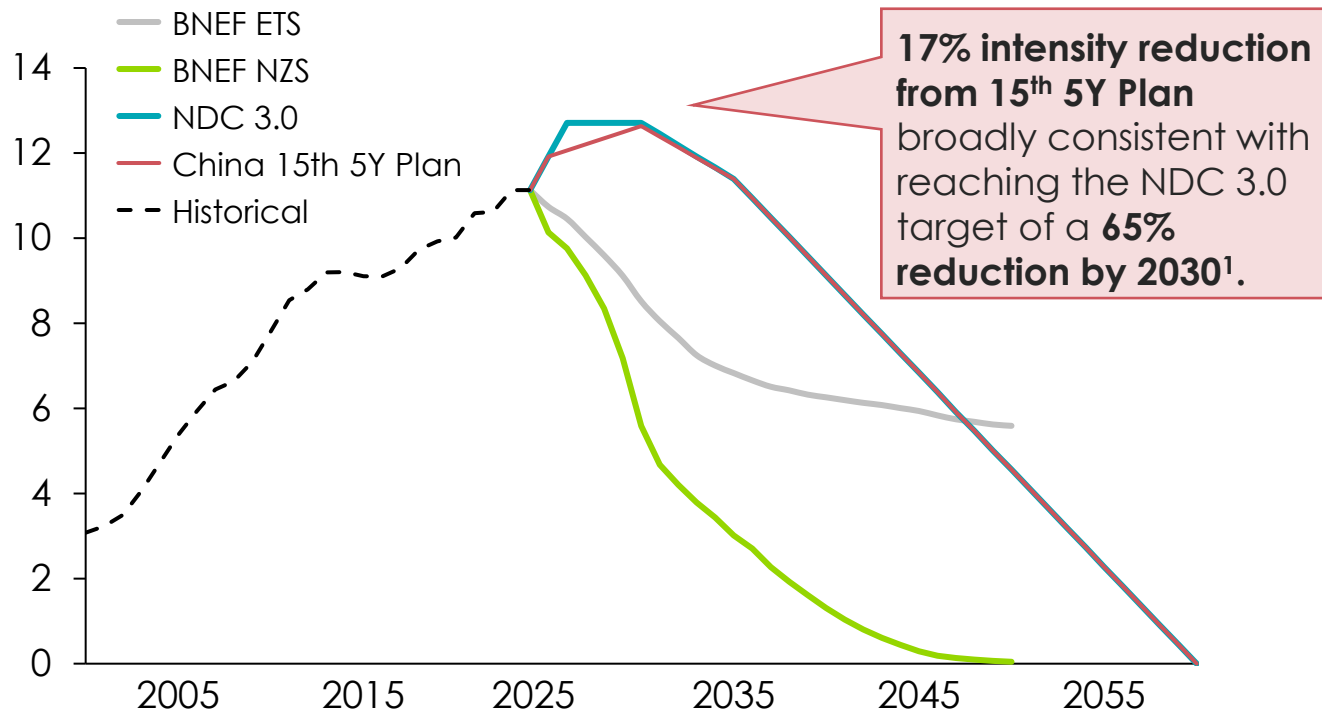
5 year plan

- China continues to prioritise scaling clean energy and cleantech over strict emissions caps in formal planning, focusing on industrial expansion and system transformation – targets of 'peaking' ahead of 2030 and 7–10% emissions reduction by 2035 expected to drive progress.
- China's new target to double non-fossil energy in 10 years could result in more ambitious than its existing 25% by 2030 and 30% by 2035 goals, given its current rate of deployment
 - Solar and wind capacity to reach 3600GW in 2035, up from 1200GW in 2024
 - Major emphasis on hydropower development
 - Offshore wind to reach 100GW in 2035, up from 48GW in 2025
 - Nuclear power development will continue, with target of 110GW in 2030, up from 62GW in 2025
- Track history of Five-Year Plan targets being supported by strong execution

China's 15th Five-Year Plan broadly aligns with the decarbonization targets outlined in its NDC 3.0.

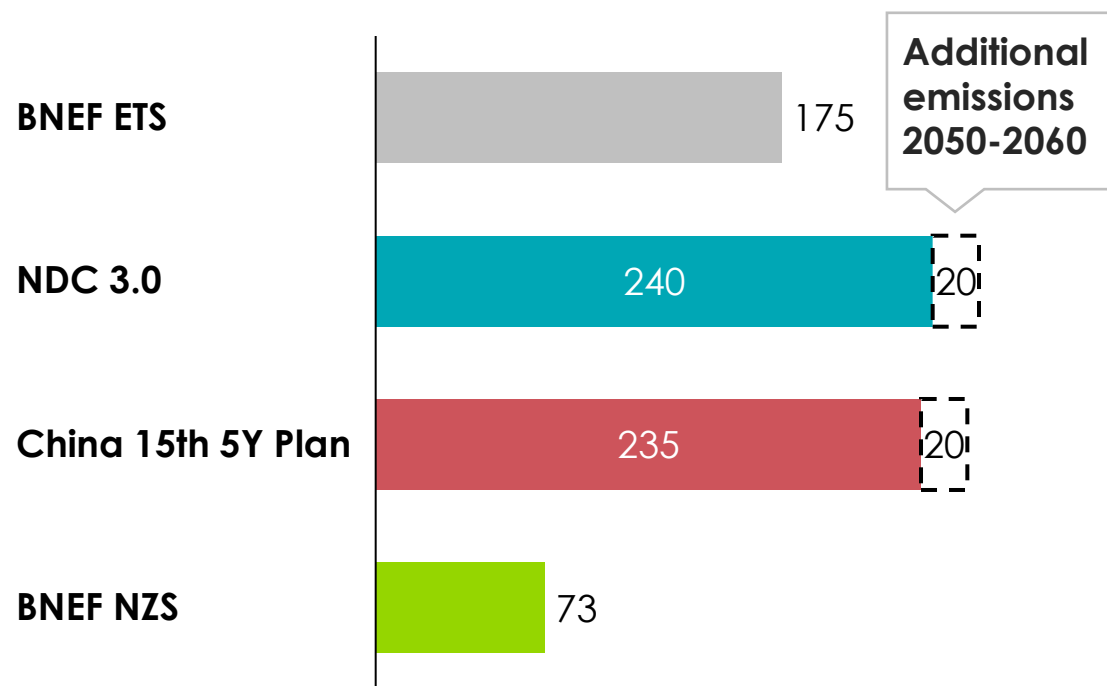
Energy-related CO₂ Emissions

Gt CO₂



Cumulative energy-related CO₂ Emissions, 2026-2050

Gt CO₂



China's 15th 5Y plan includes drivers for emissions, but no timeframe is specified for actions:

- China to expedite implementation of an oversight system for stationary pollution sources, fixed industrial facilities, centred on emissions permits, tightening regulatory control over facility-level emissions
- Carbon emissions statistical and accounting systems to be refined, with enforcement of carbon performance assessments across local authorities, industries, enterprises, projects, and products

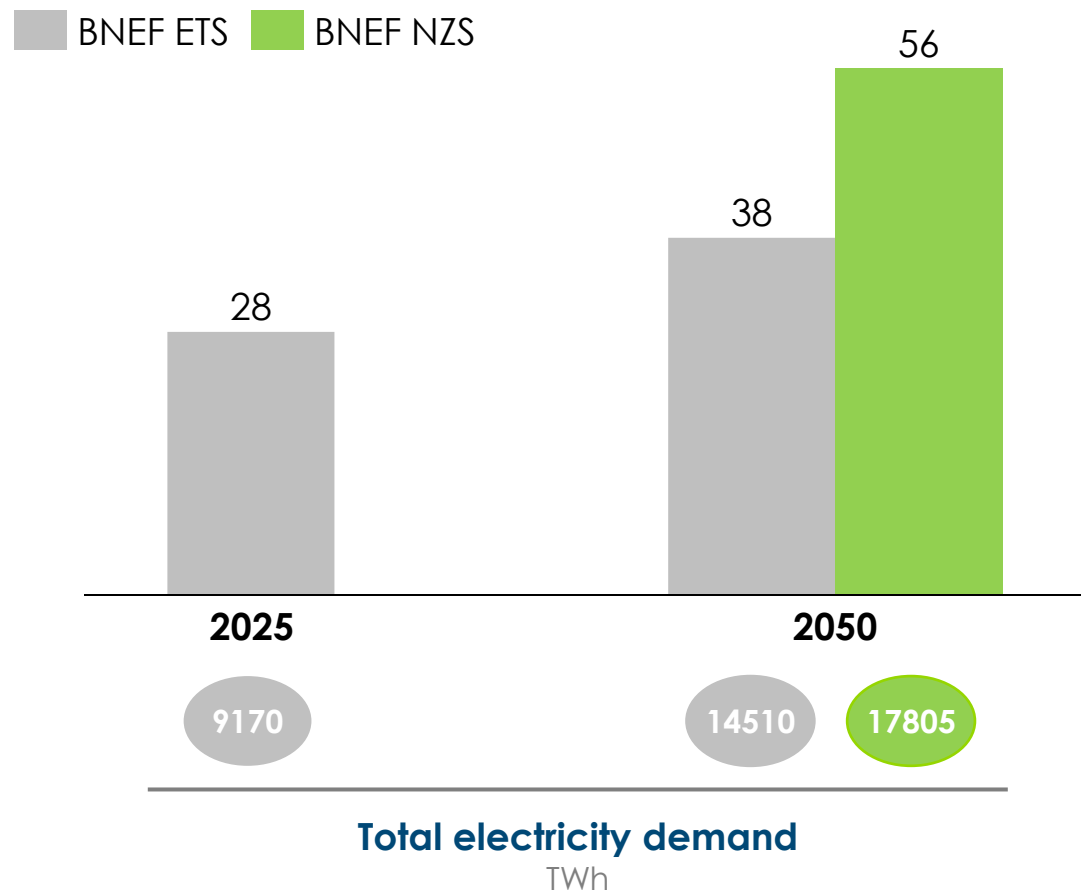
1. Assumption aligned with a 5% GDP Growth

Source: BloombergNEF (2025) New Energy Outlook 2025; China's 15th 5-year plan for National Economic and Social Development (2025)

Additional Chinese industry electrification is the biggest difference between an economic transition and staying well below 2°C

BNEF Electricity share of final demand, China

% of final demand



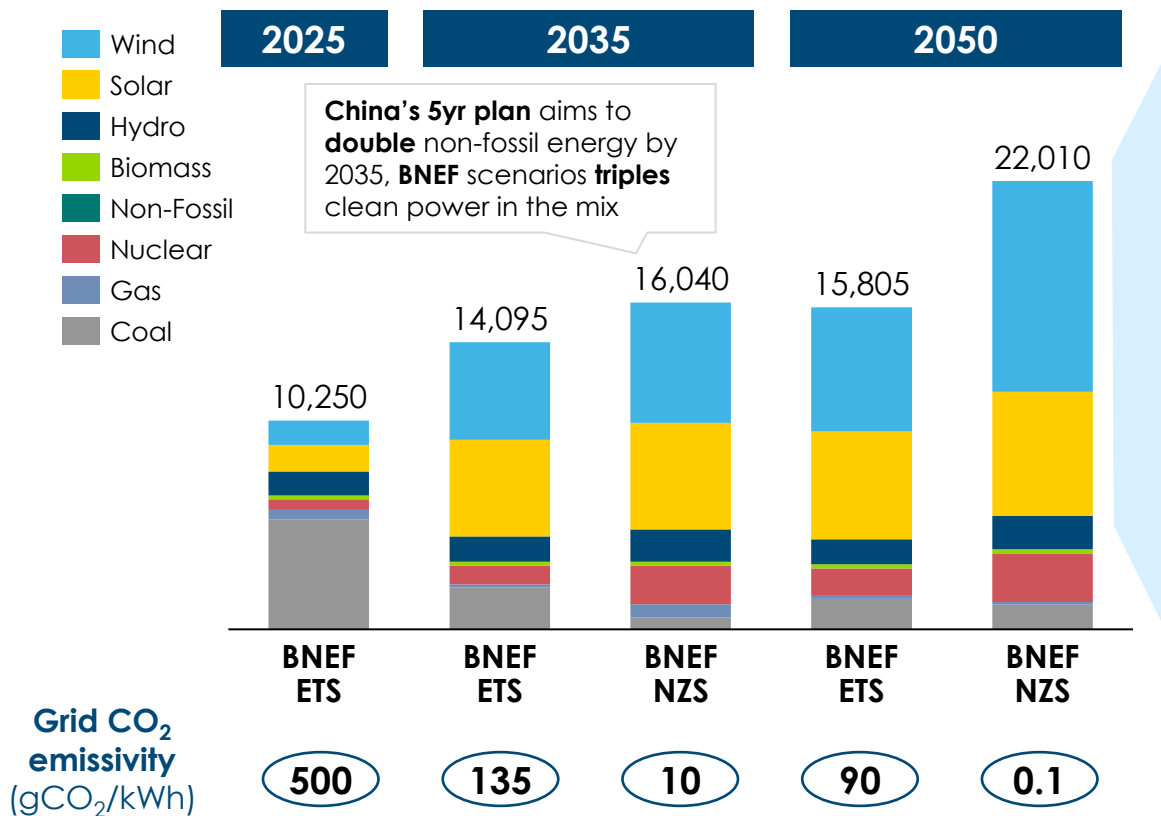
Drivers of electrification	Current	BNEF ETS	BNEF NZ
	2025	2050	2050
Air Conditioning Units per person (Added TWh after 2025)	0.40 (-)	0.75 (420)	0.85 (420)
Data Centers TWh	110	845	NA
Passenger EV sales % of new sales	40	95	100
Commercial EVs % of new sales	10	80	95
Industry electrification % of final energy	35	40	60

Source: BNEF (2025), New Energy Outlook 2025.

On top of rapid solar deployment, well below 2°C will require further scale up of nuclear and wind generation to displace coal

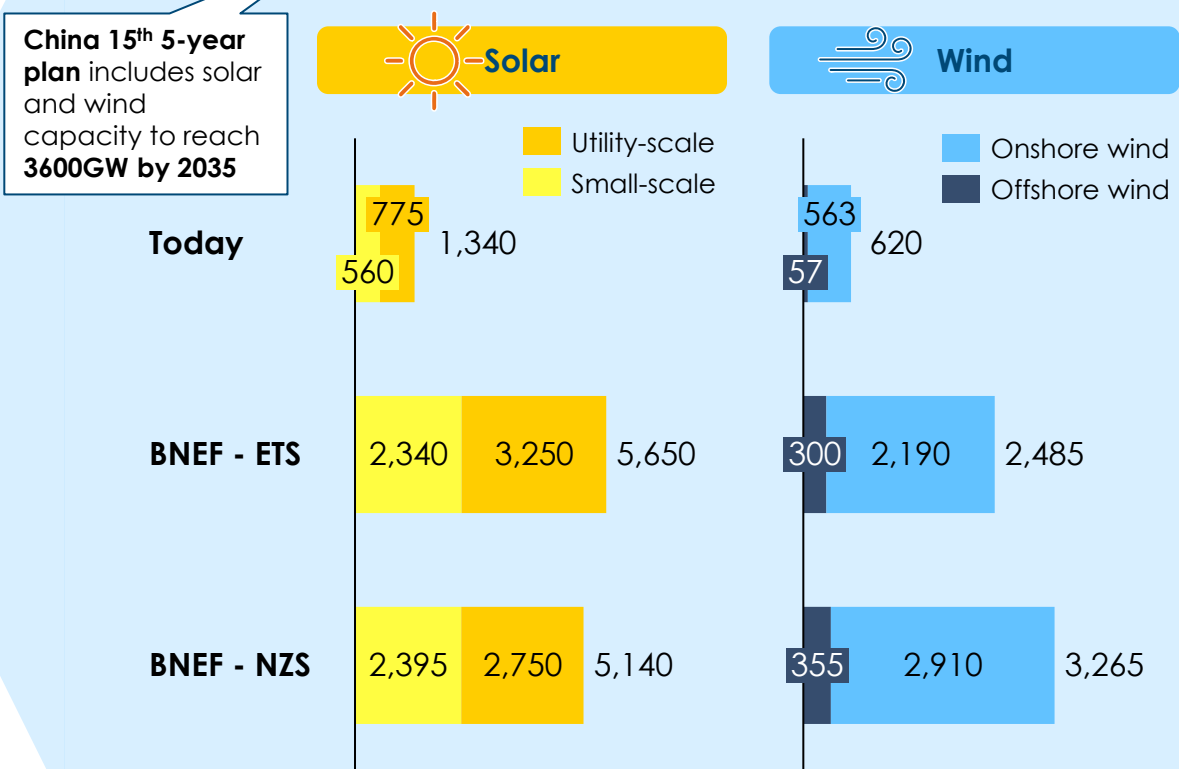
Electricity generation mix – BNEF ETS & NZS

TWh



Total VRE capacity additions, 2025 – 2050 cumulative

GW



China's 15th 5Y plan includes drivers for renewables, but no timeframe is specified for actions:

- Wind, photovoltaic, hydro, and nuclear energy to continue to be developed
- Acceleration of smart grid construction and management, via transmission corridors, inter-provincial and cross grid operating zones, supercomputing

Source: BNEF (2025), *New Energy Outlook 2025*; Central Committee of the Communist Party of China (2025) *China's 15th 5-year plan for National Economic and Social Development* (2025); CREA (2026) *China's 15th Five-Year Plan — Implications for climate and energy transition*.

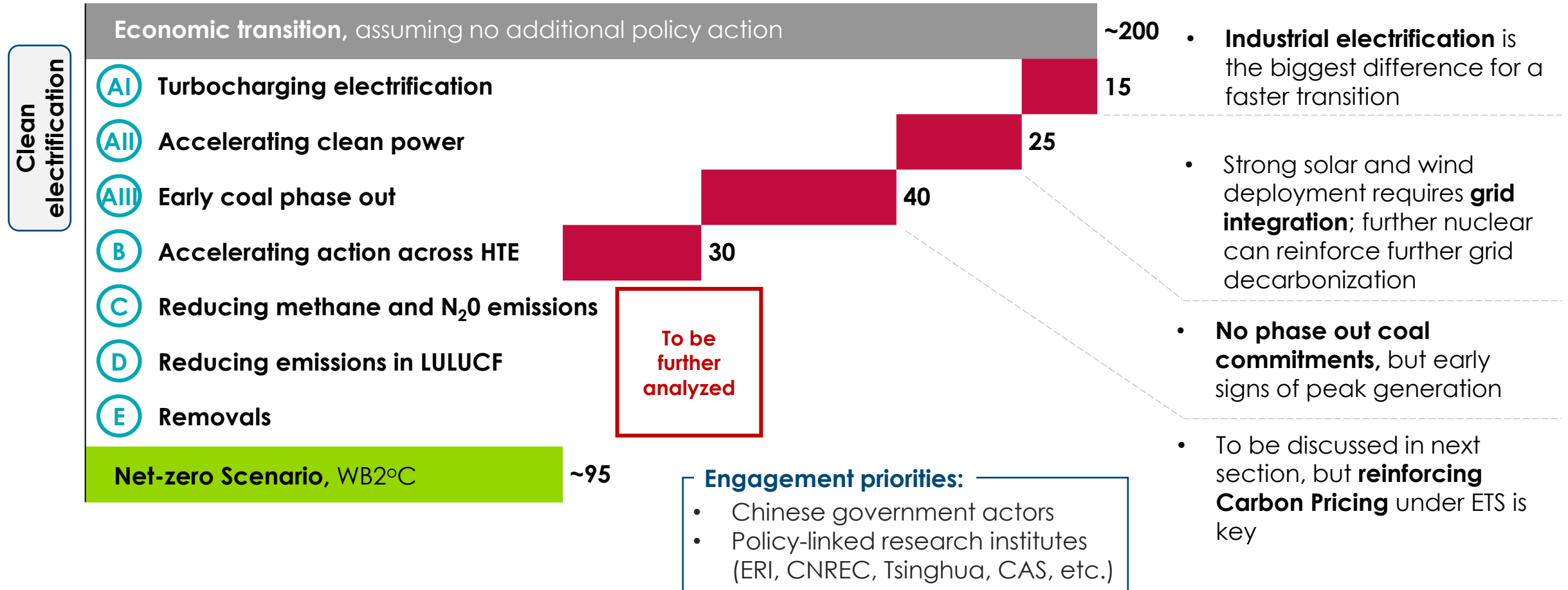
China's pathway to well below 2°C depends on how they can effectively phase out of coal, alongside hard-to-electrify sector action

Preliminary

Key mitigation areas

Cumulative GtCO₂ 2025-2050

Key insights



- **Industrial electrification** is the biggest difference for a faster transition
- Strong solar and wind deployment requires **grid integration**; further nuclear can reinforce further grid decarbonization
- **No phase out coal commitments**, but early signs of peak generation
- To be discussed in next section, but **reinforcing Carbon Pricing** under ETS is key

Engagement priorities:

- Chinese government actors
- Policy-linked research institutes (ERI, CNREC, Tsinghua, CAS, etc.)



Agenda

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India's latest NDC and NITI Aayog's net zero pathway frame a development-first transition, but still centered on electrification and renewables

News Updates

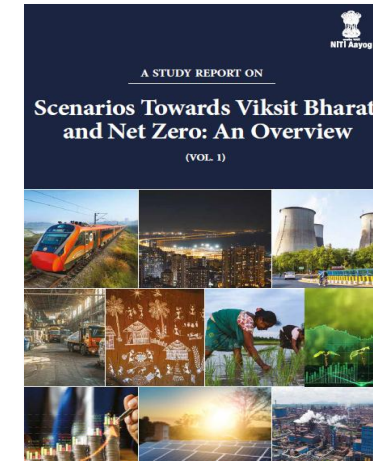
Cabinet approves India's Nationally Determined Contribution (2031-2035) to be communicated to the United Nations Framework Convention on Climate Change

25 Mar, 2026



India's 3rd NDC

- Formal international climate commitment under the UNFCCC, defining the country's contribution to global mitigation efforts
- Cabinet approved India's NDC for 2031-2035 in March 2026



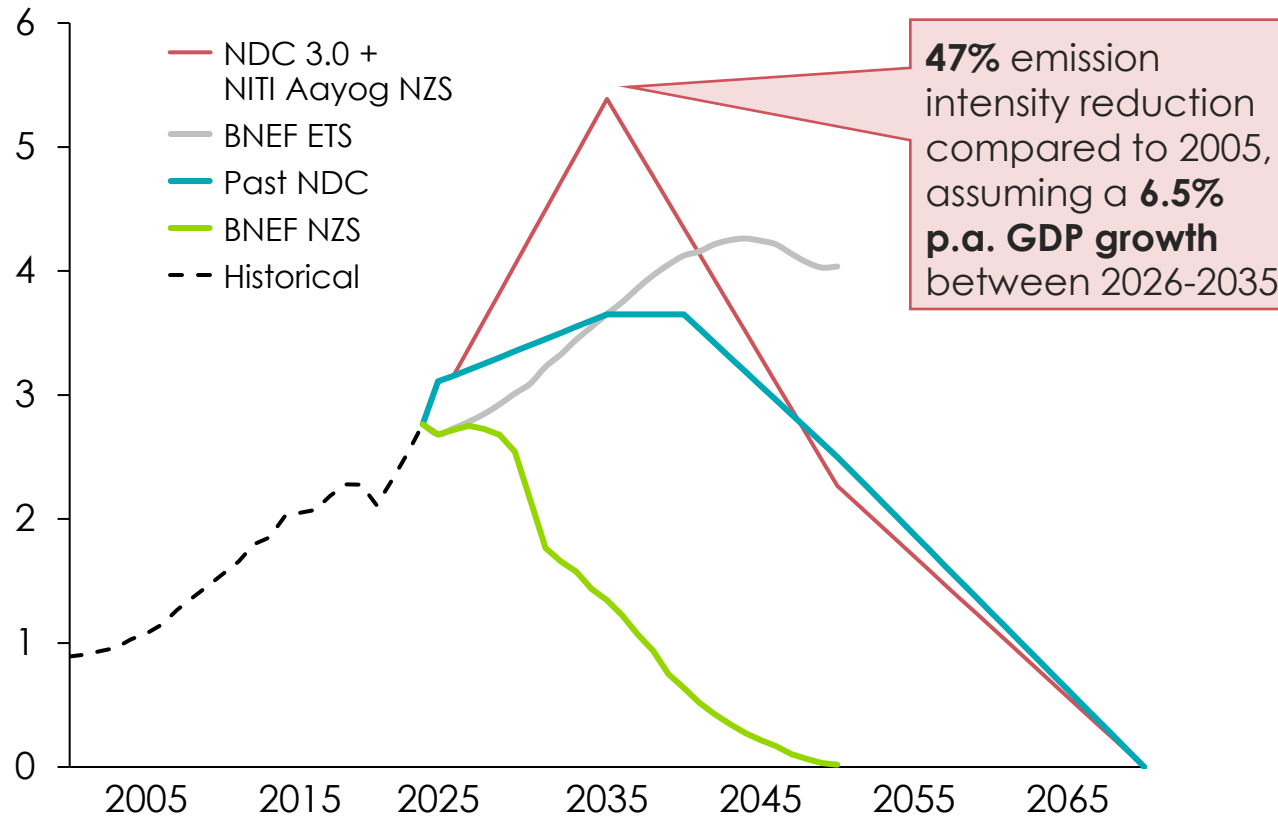
Illustrative scenarios

Niti Aayog

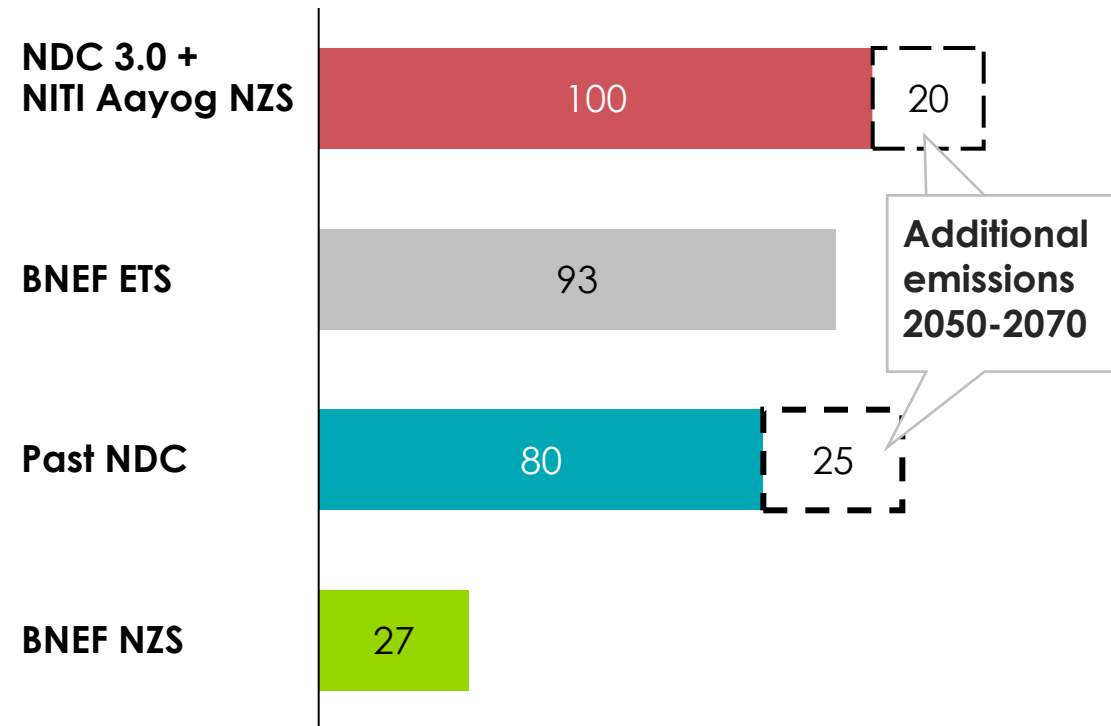
- Produced by the Government of India's policy think tank, together with inter-ministerial working groups and external experts
- Models pathways for India to reach net zero while becoming a developed economy
- Final energy demand rises from 8,000 TWh in 2025 to 16,000–19,000 TWh in 2050
- Even in their Net Zero Scenario, coal is projected to contribute ~35% of India's Primary energy supply in 2050

If India continues to grow at 6.5% p.a., the recently announced pledge of 47% cut in emissions intensities by 2035 still implies emissions growth

Energy-related CO₂ Emissions
Gt CO₂



Cumulative energy-related CO₂ Emissions, 2026-2050
Gt CO₂



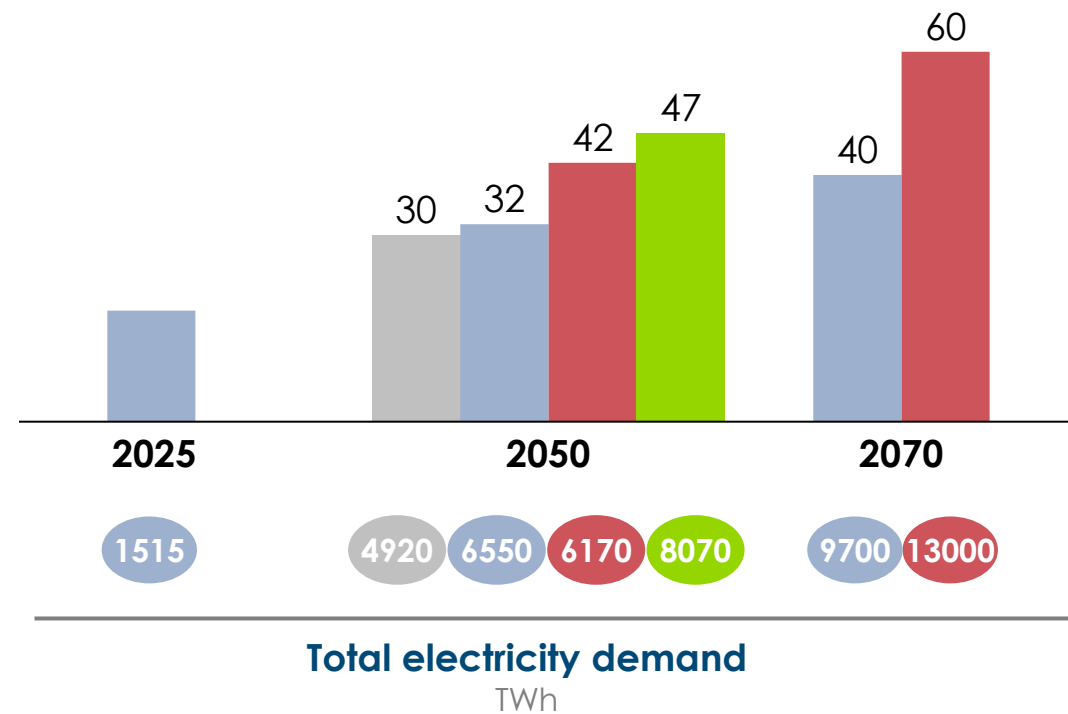
Source: BloombergNEF (2025) New Energy Outlook 2025; IEA (2025) 'CO₂ emissions from fuel combustion India'; NITI Aayog (2026) A Study Report On - Scenarios Towards Viksit Bharat and Net Zero: An Overview (Vol. 1); IMF; PM India (2026) Cabinet approves India's Nationally Determined Contribution (2031-2035) to be communicated to the United Nations Framework Convention on Climate Change; IEA (2025) World Energy Review; JRC/IEA 2025 Report (2025) GHG emissions of all world countries; Global Carbon Budget (2025) Fossil fuel CO₂ emissions hit record high in 2025; Climate Change Tracker available at: <https://climatechangenetracker.org/climate-change-progress/current-remaining-carbon-budget-and-trajectory-fill-exhaustion> [Accessed November 2025]

NITI Aayog's Net Zero scenario high electrification share is driven by increased use of appliances in buildings and hydrogen in industry

Electricity share of final demand, India

% of final energy demand

■ BNEF ETS ■ NITI Aayog CPS ■ NITI Aayog NZS ■ BNEF NZS



Drivers of electrification	Current	BNEF ETS	BNEF NZS	NITI Aayog NZS
	2025	2050	2050	2050
Air Conditioning Units per person (Added TWh after 2025)	0.05 (-)	0.20 (595)	0.15 (595)	0.5 (270)
Data Centers TWh	10	550	NA	395
Passenger EV sales % of new sales	5	86	100	70
Commercial EVs % of new sales	<1	28	93	25-90 ¹
Industry electrification % of final demand	15	15	30	35

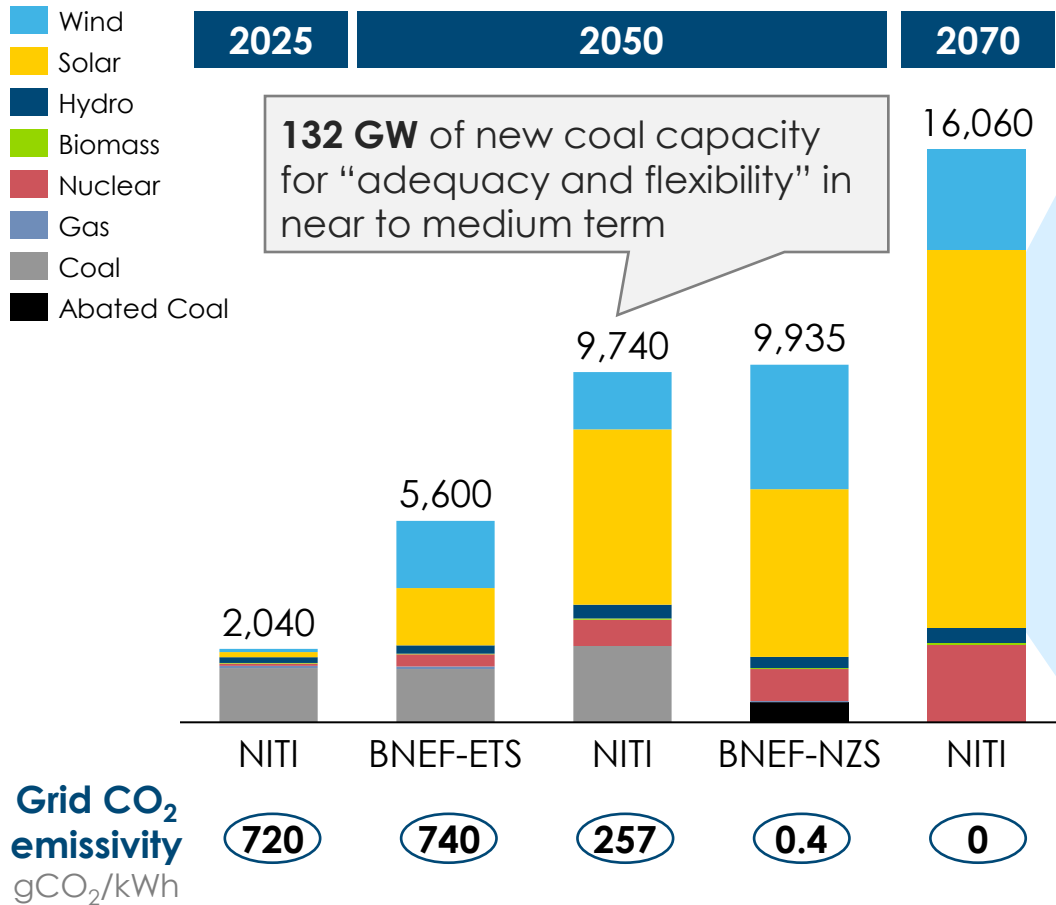
1. Vehicle payload ranging from under 3.5 tonnes to above 12 tonnes

Source: NITI Aayog (2026) A Study Report On - Scenarios Towards Viksit Bharat and Net Zero: An Overview (Vol. 1, Sectoral insights: Industry, Transport, Buildings); BloombergNEF (2025) New Energy Outlook 2025

NITI Aayog's net zero pathway is driven by massive solar buildout, but still projects new unabated coal capacity by 2050

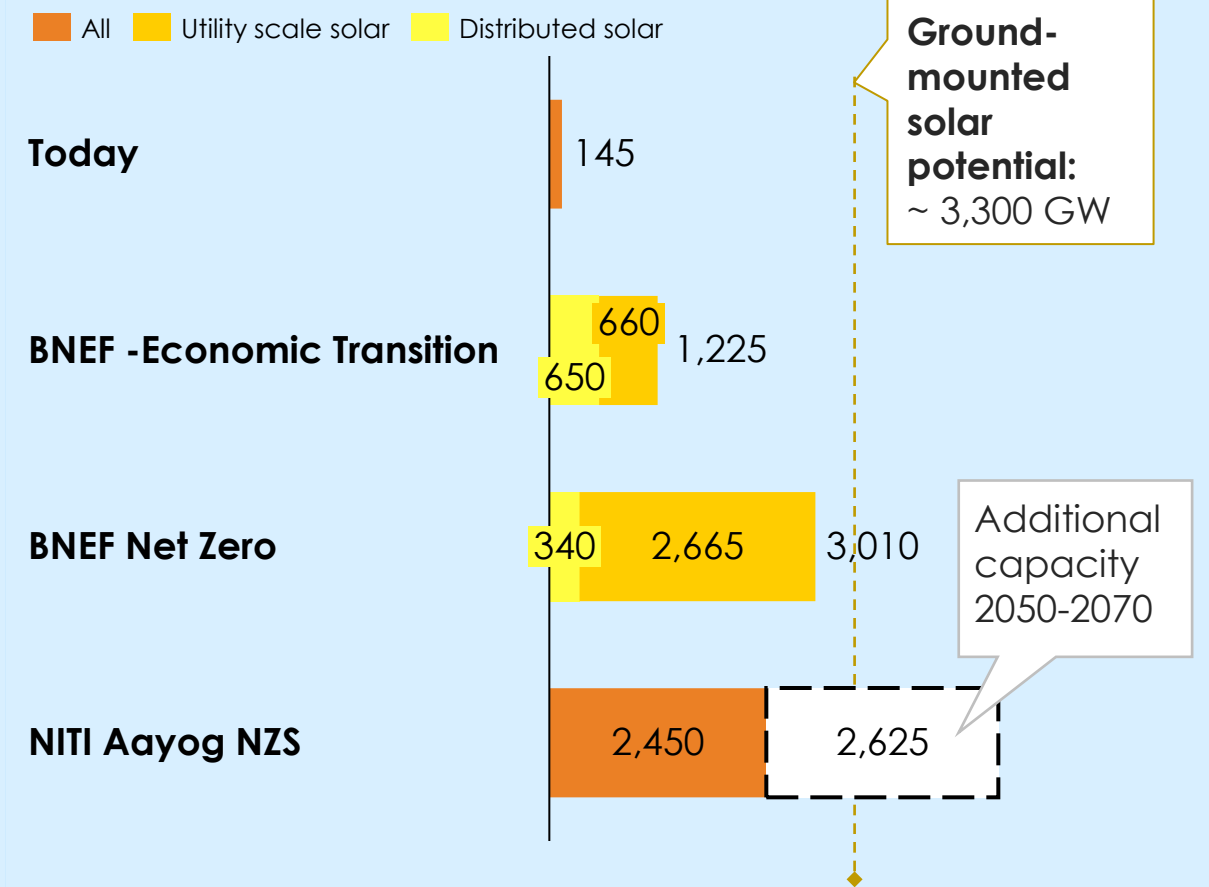
Electricity generation mix – multiple scenarios

TWh



Total solar capacity additions, 2025 – 2050 cumulative

GW

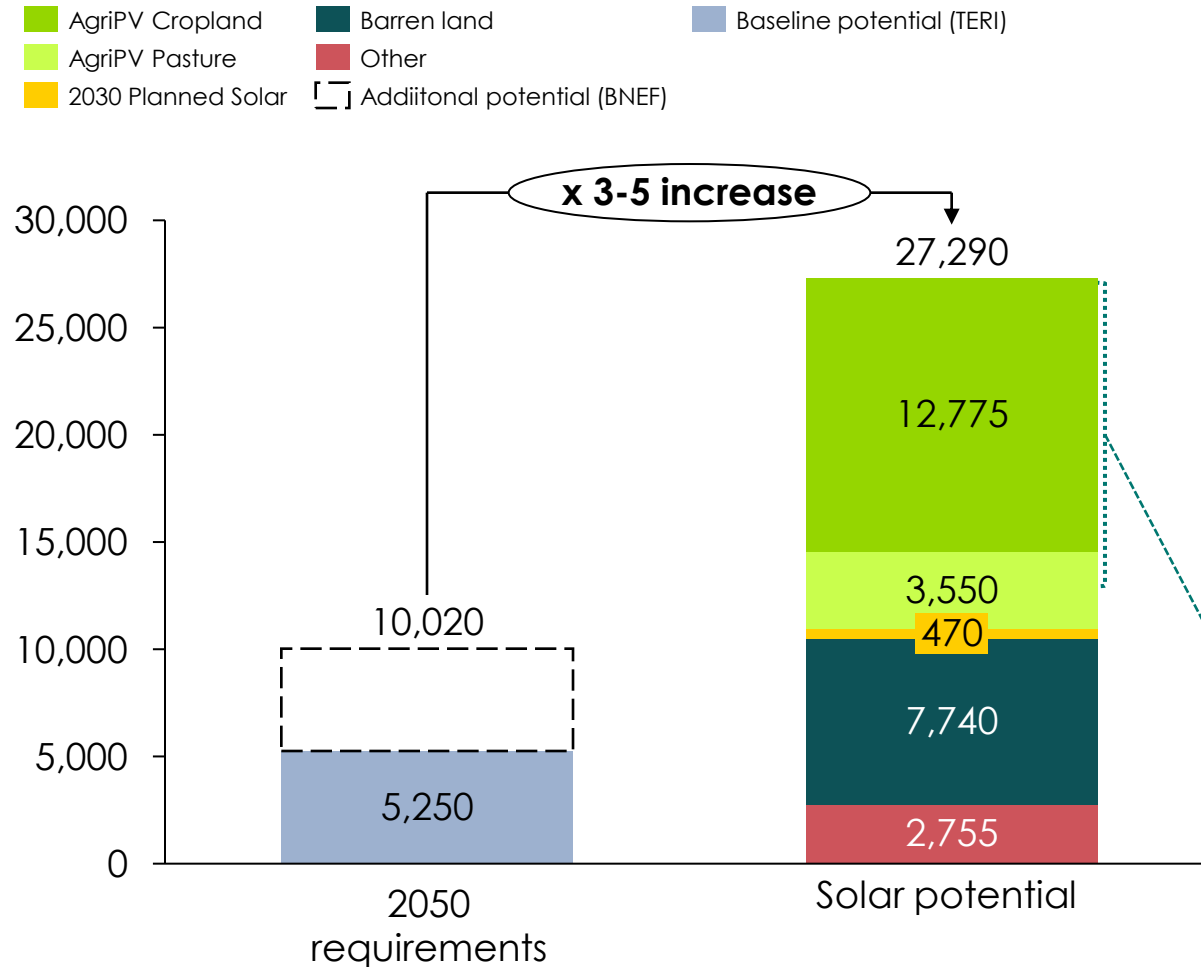


Source: NITI Aayog (2026) A Study Report On - Scenarios Towards Viksit Bharat and Net Zero: An Overview (Vol. 1); BloombergNEF (2025) New Energy Outlook 2025; NITI Aayog (2026) A Study Report On - Scenarios Towards Viksit Bharat and Net Zero: An Overview (Vol. 1); EMBER (2026) Battery storage is now cheap enough to unleash India's full solar potential

ETC, in partnership with TERI and GEAPP, finds that AgriPV could turn India's land constraints into an outsized solar opportunity

India's electricity requirements in 2050 compared with solar potential

TWh



- Previous AgriPV range established by GIZ was for around **3,000-13,000 GW of solar**
- New **TERI + ETC analysis confirms at least 8,000 GW** of AgriPV possible on high potential cropland.
- **At least 2,000 GW (3,500 TWh) of this is considered 'high certainty'**



Note: Electricity generation calculated using an average solar capacity of 18%. Source: BNEF (2025) New Energy Outlook 2025; TERI (2023), India's Electricity Transition Pathways to 2050: Scenarios and Insights; TERI (2025), Reassessment of Solar Potential in India: A Macro-level Study

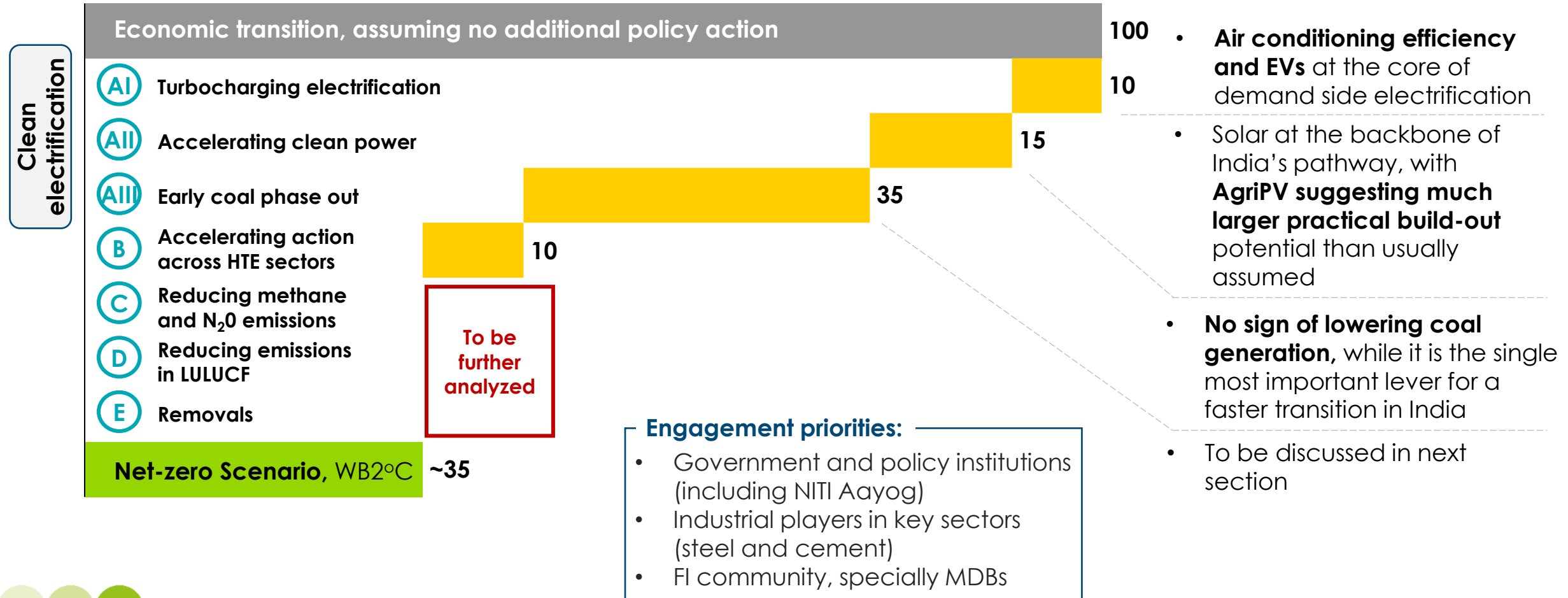
Early coal phase out in India represents half of the way to be “well below 2°C” aligned

Preliminary

Key mitigation areas

Cumulative GtCO₂ 2025-2050

Key insights



- **Air conditioning efficiency and EVs** at the core of demand side electrification
- Solar at the backbone of India's pathway, with **AgriPV suggesting much larger practical build-out potential** than usually assumed
- **No sign of lowering coal generation**, while it is the single most important lever for a faster transition in India
- To be discussed in next section

Engagement priorities:

- Government and policy institutions (including NITI Aayog)
- Industrial players in key sectors (steel and cement)
- FI community, specially MDBs

Agenda

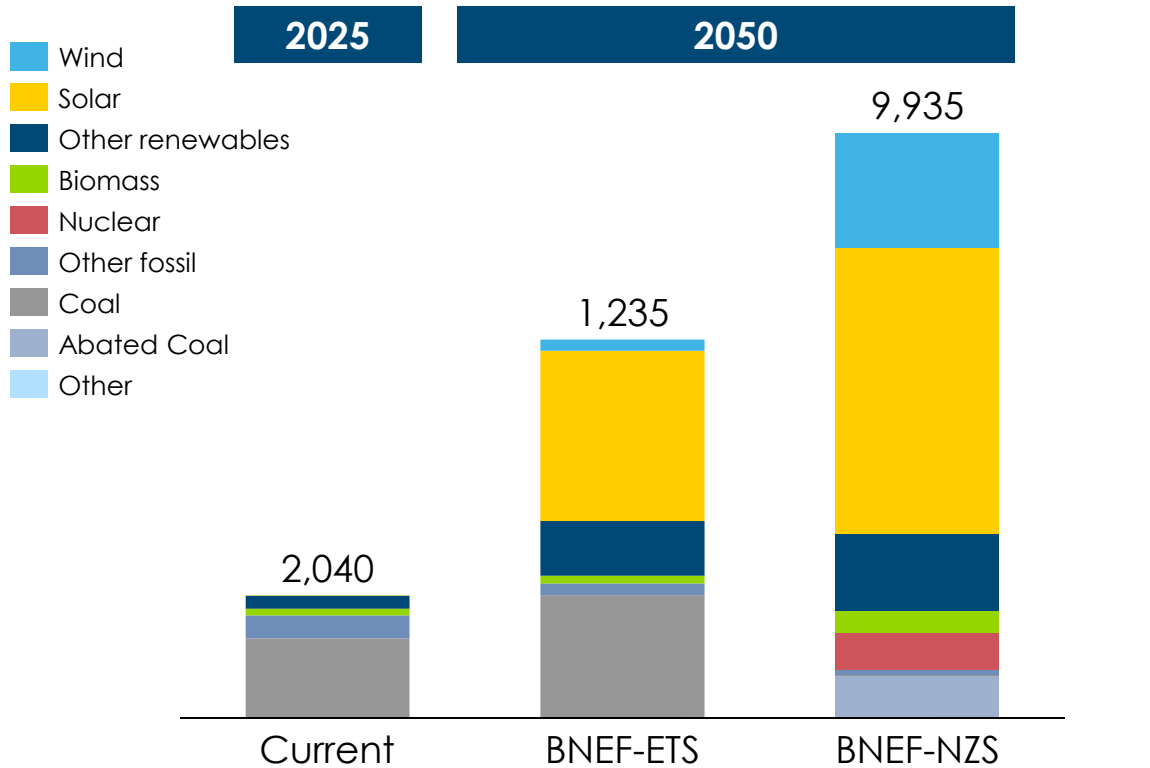
- Key opportunities to accelerate clean electrification
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Indonesia's power transition hinges on replacing coal build plans with strong renewables build out

Electricity generation mix – multiple scenarios

TWh

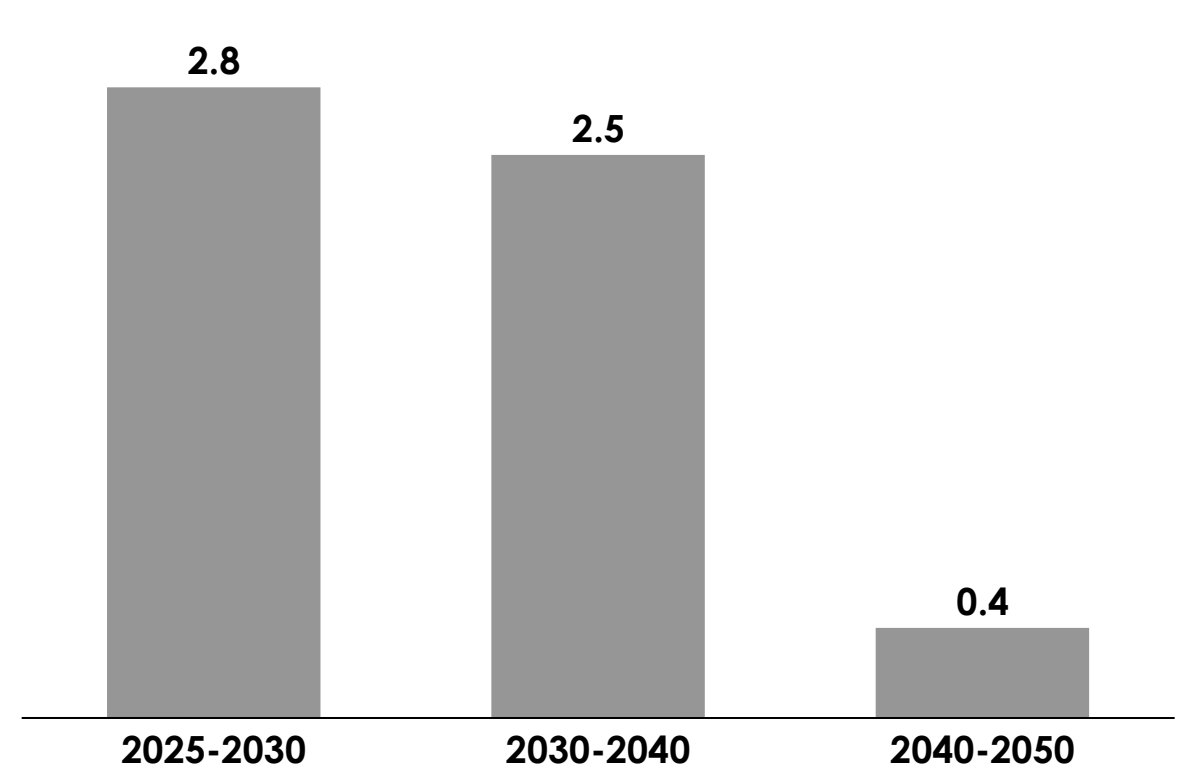


Grid CO₂ emissivity
gCO₂/kWh



BNEF ETS, Indonesia unabated coal annual average build out

GW/yr



Source: Systemiq analysis for ETC; BNEF New Energy Outlook 2025

ETC work with IESR



PROJECT OBJECTIVES AND KEY QUESTIONS FOR THE INDONESIA ETC STUDY

OBJECTIVE OF THE STUDY

The Indonesia Power System Transformation project seeks to:

- Showcase the demand-side case for clean power
- Reframe renewable energy and electrification as key opportunities to reach Indonesia's economic growth targets
- Build a collective sense of urgency from stakeholders and decision makers through a report and robust communication strategy

Delivered by



SYSTEMIQ

Supported by



KEY QUESTIONS WE ARE ANSWERING IN THE STUDY

❑ ELECTRICITY DEMAND

How will electricity demand evolve this decade?

❑ ELECTRICITY SUPPLY

What electricity supply mix can meet growing demand at lowest-cost?

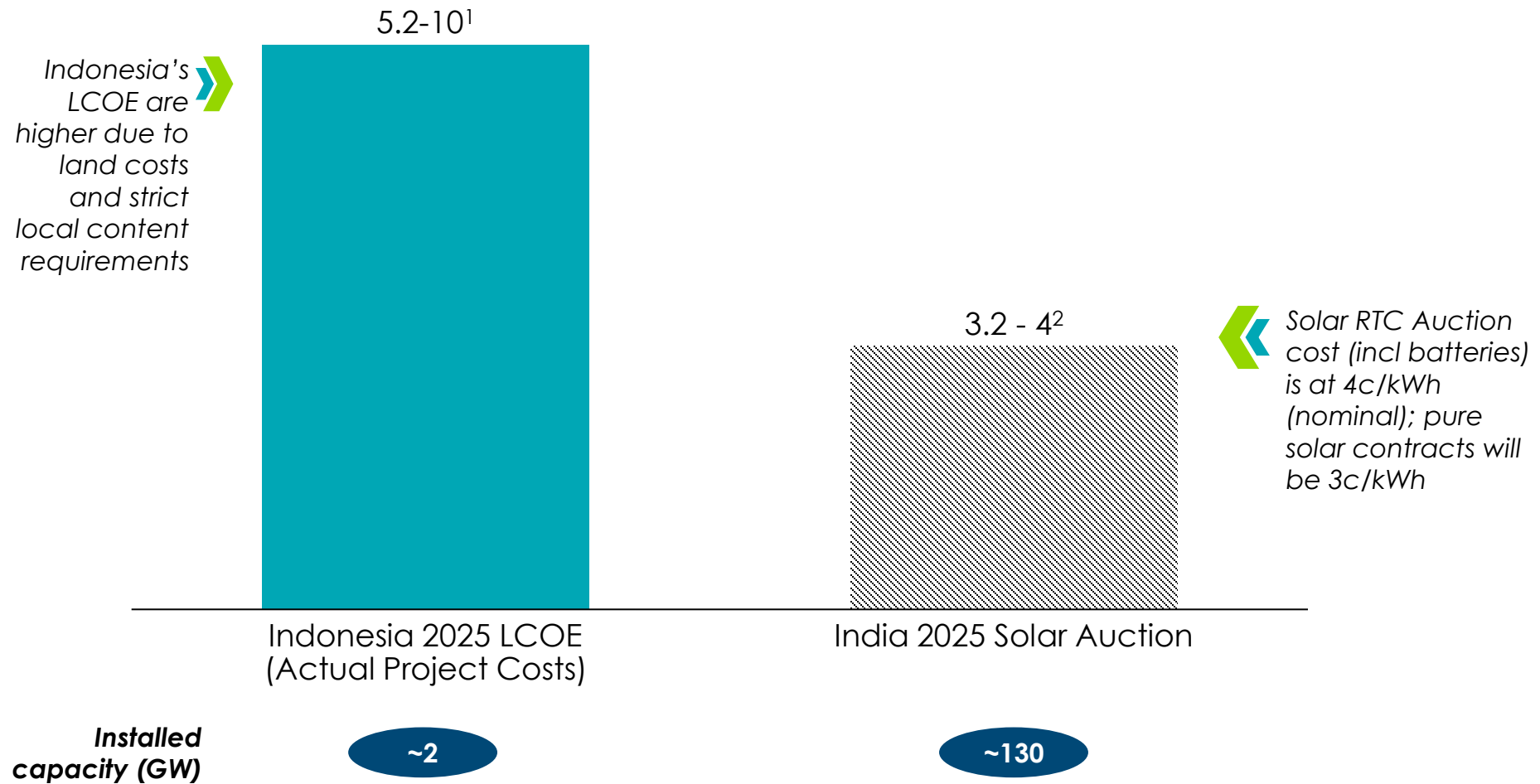
❑ ECONOMIC GROWTH

What is the electricity demand and supply scenario that delivers highest growth?

❑ STRATEGIC CATALYSTS

How can electrification and renewables be unlocked, to support economic growth?

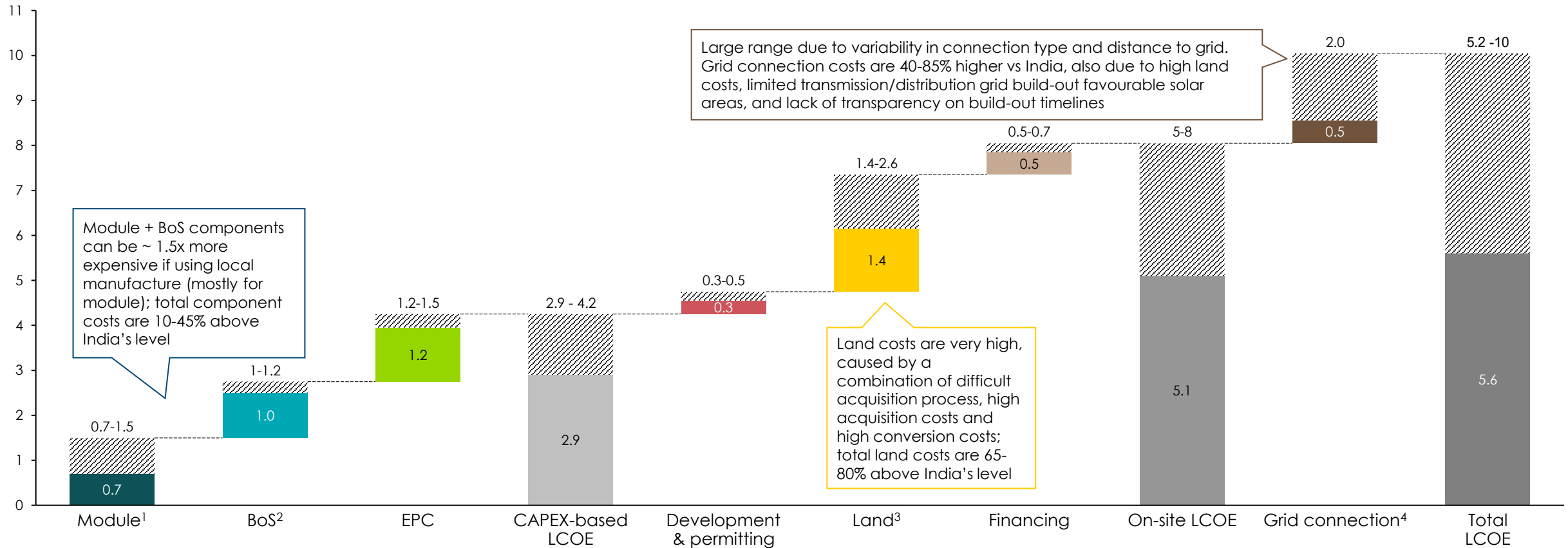
INDONESIA IS CURRENTLY WAY BEHIND INDIA IN THE SOLAR PV RACE, WITH STARK DIFFERENCES IN SOLAR PV LCOE AND INSTALLED CAPACITY AS OF 2025



THE HIGH COST OF SOLAR IS DRIVEN BY HIGH MODULE COSTS, LAND ACQUISITION COST, AND TRANSMISSION COSTS

Breakdown of Indonesia's versus India's solar LCOE today

\$c/kWh, favourable Solar locations



Notes: 1. Survey results of 12 to 20 c/Wp, with upper range representing local manufactured prices; 2. BoS includes inverter, electrical components, mounting or floaters (if applicable) and others. 3. Based on average land price and additional land conversion cost for 5 major islands modelled in our study (Java, Sumatera, Kalimantan, Sulawesi, MPNT) 4. Large range as cost depends on connection type (subsea/overland etc.) and distance to transmission grid
Source: Expert input

LOW-COST SOLAR | THE 3-STEP JOURNEY TOWARDS LOW-COST SOLAR FOR INDONESIA

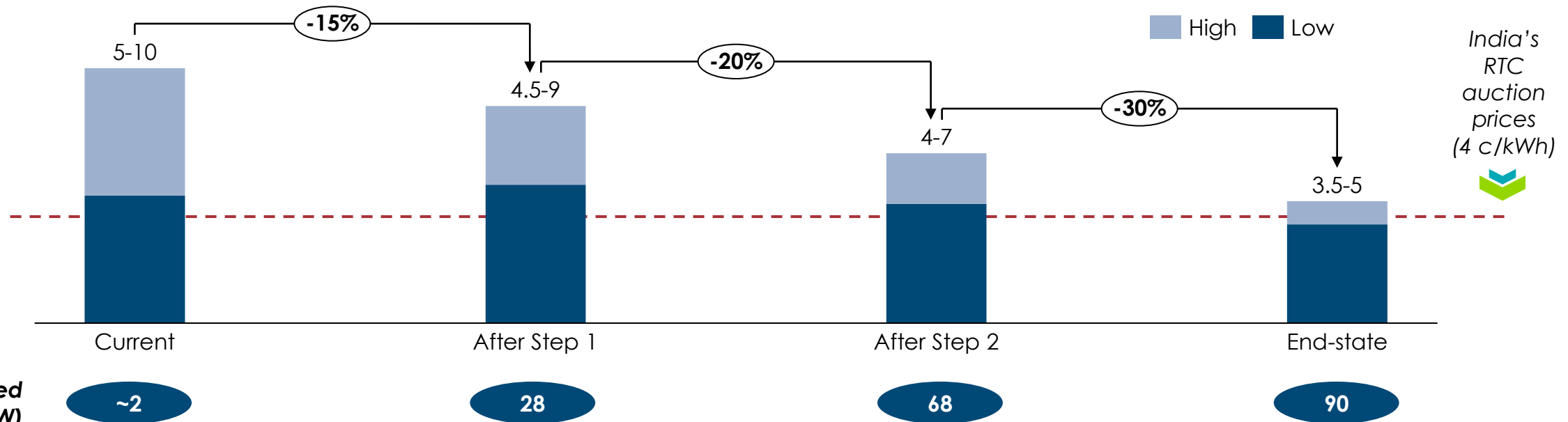
Scenario assumptions for LCOE of Large-scale Solar PV

\$c/kWh

What needs to happen for cost reduction in the cost journey

Unlock catalytic projects	Scale policy support	Scale-up domestic manufacturing
<ul style="list-style-type: none"> Catalytic large-scale projects are unlocked (e.g., Singapore Export) for buyers willing to pay premium. Small cost reduction through improvements in permitting, financing and installation/EPC 	<ul style="list-style-type: none"> Solar PV deployment scales as costs come down and policy support improves Policy support brings key cost components (land, permitting) Scale increased through RUPTL and 100 GW programme delivery 	<ul style="list-style-type: none"> Large scale-up in Solar PV project delivery unlocks low-cost solar at level seen in recent auctions in leading solar markets Continued policy support Coordinated scale-up of domestic solar manufacturing

Team is currently working with ReNew power on understanding the LCOE journey of India, and what parts can Indonesia replicate

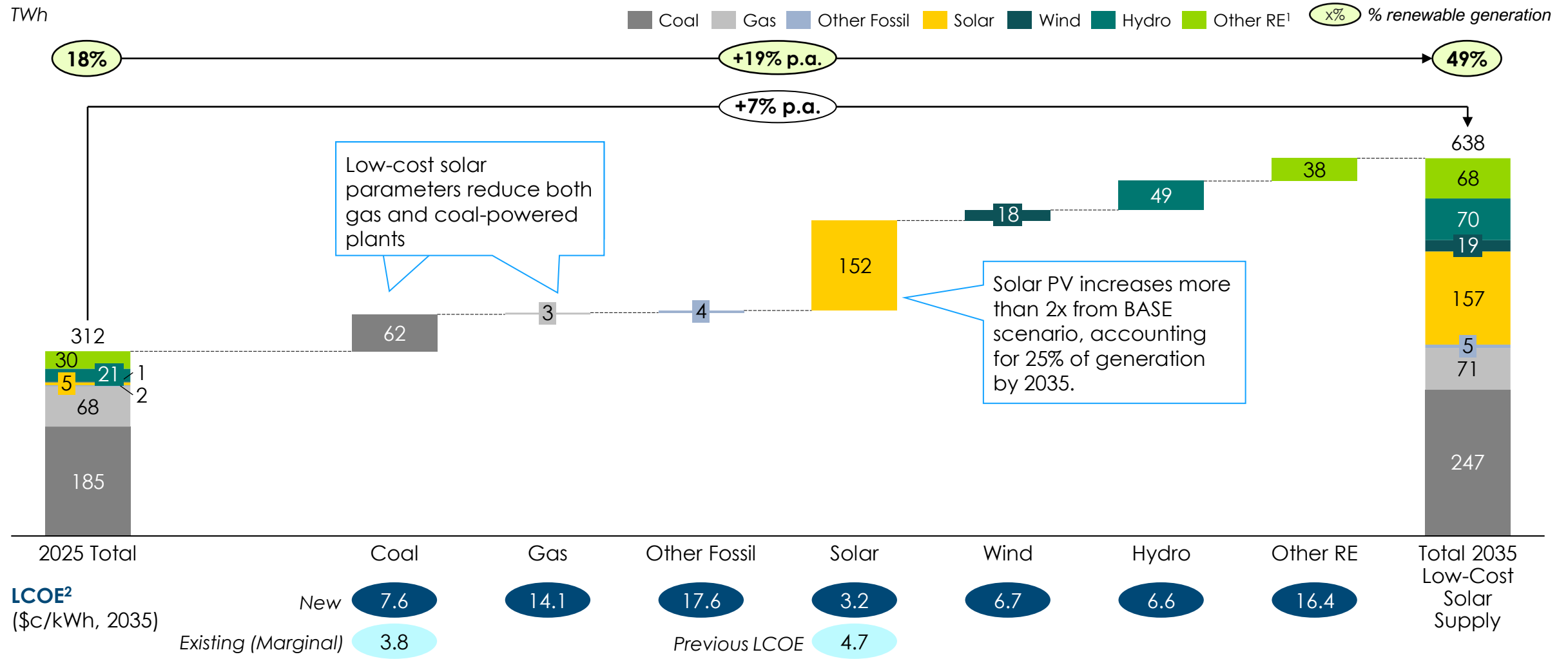


Installed capacity (GW)



LOW-COST SOLAR | IF SOLAR PV LCOE COMES DOWN MORE RAPIDLY, SOLAR COULD ACCOUNT FOR 25% GENERATION BY 2035

2025-2035 ELECTRICITY SUPPLY (ADDITION) IN HIGH ELECTRIFICATION DEMAND + LOW-COST SOLAR SCENARIO, BY SECTOR



Note: current supply modelling still includes DMO-priced coal. For scenario D, this will be updated to export-priced coal in the next model runs.



Notes: 1) Includes bio-energy and geothermal; 2) The Levelized Cost of Electricity (LCOE) figures represent the average costs across grouped technology categories, including: Coal, Gas (CCGT, Gas Machine with LNG, and Simple-cycle Gas with LNG), Other Fossil (Diesel and Nuclear), Hydro (Large and Small), Other RE (Biogas, Biomass, Waste-to-Energy, and Geothermal).

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INCREASING RENEWABLE ELECTRICITY SUPPLY CAN DRIVE ECONOMIC GROWTH

Oil imports

• **\$60 Bn** •

cumulative savings
between
2025-2035

New export sectors

• **\$8-9 Bn** •

annual revenues
by 2035

Subsidy savings

• **\$1.7 Bn** •

per year
by 2035

Energy system investment

• **\$~200 Bn** •

between 2025-2035 into
energy system and
electrification

Jobs

• **45,000** •

Cumulative net additional
jobs by 2035



Indirect
structural &
strategic
gains

01

(Export)
Competitiveness

02

Energy price
stability

03

Energy system
resilience

04

Reduced
air pollution

05

Climate
credibility



Agenda

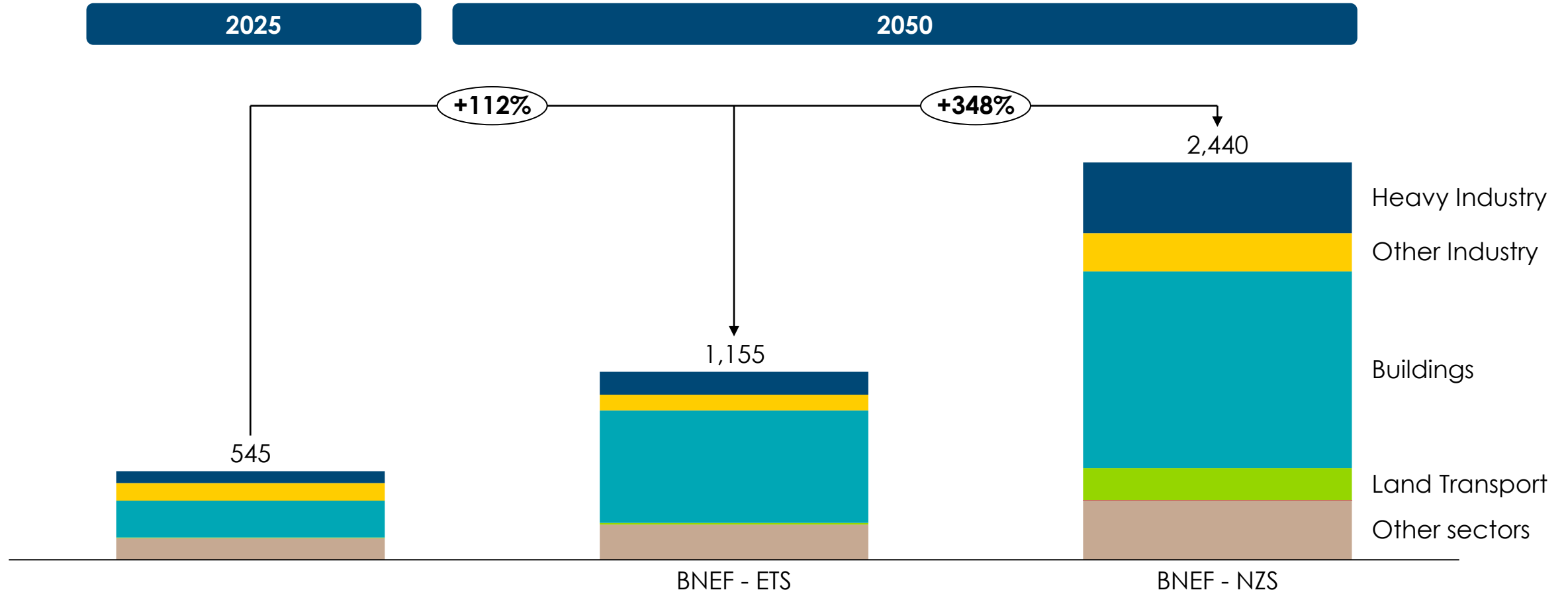
- Key opportunities to accelerate clean electrification
- China: finally decreasing coal dependency?
- India: unparalleled potential for solar
- Indonesia: spotlight on ETC's work with IESR
- **Solarizing Africa: opportunities to leapfrog to clean electrification**
- Europe: decreasing reliance on gas
- Next steps



According to BNEF scenarios, power demand in Sub-Saharan Africa could increase fivefold by 2050, making clean scale-up a development imperative

Power demand in Sub-Saharan Africa, BNEF scenarios

TWh



Notes: For demand, other sectors aligns with BNEF definition, including non-energy use;
Source: Systemiq analysis for ETC; BNEF New Energy Outlook 2025;

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Placeholder

Solarizing Africa - ISA



Agenda

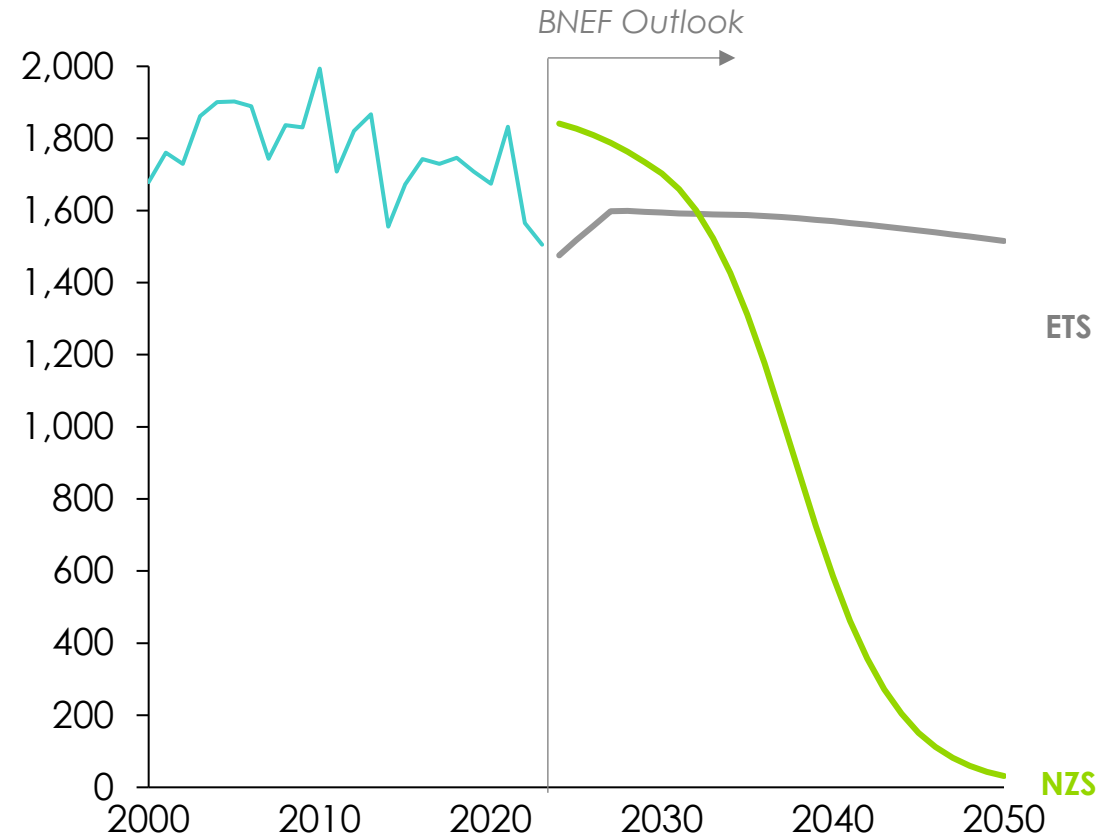
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- **Europe: decreasing reliance on gas**
- Next steps



According to BNEF, Europe's pathway to lower gas dependence relies on accelerated electrification of buildings and reductions in gas-fired power

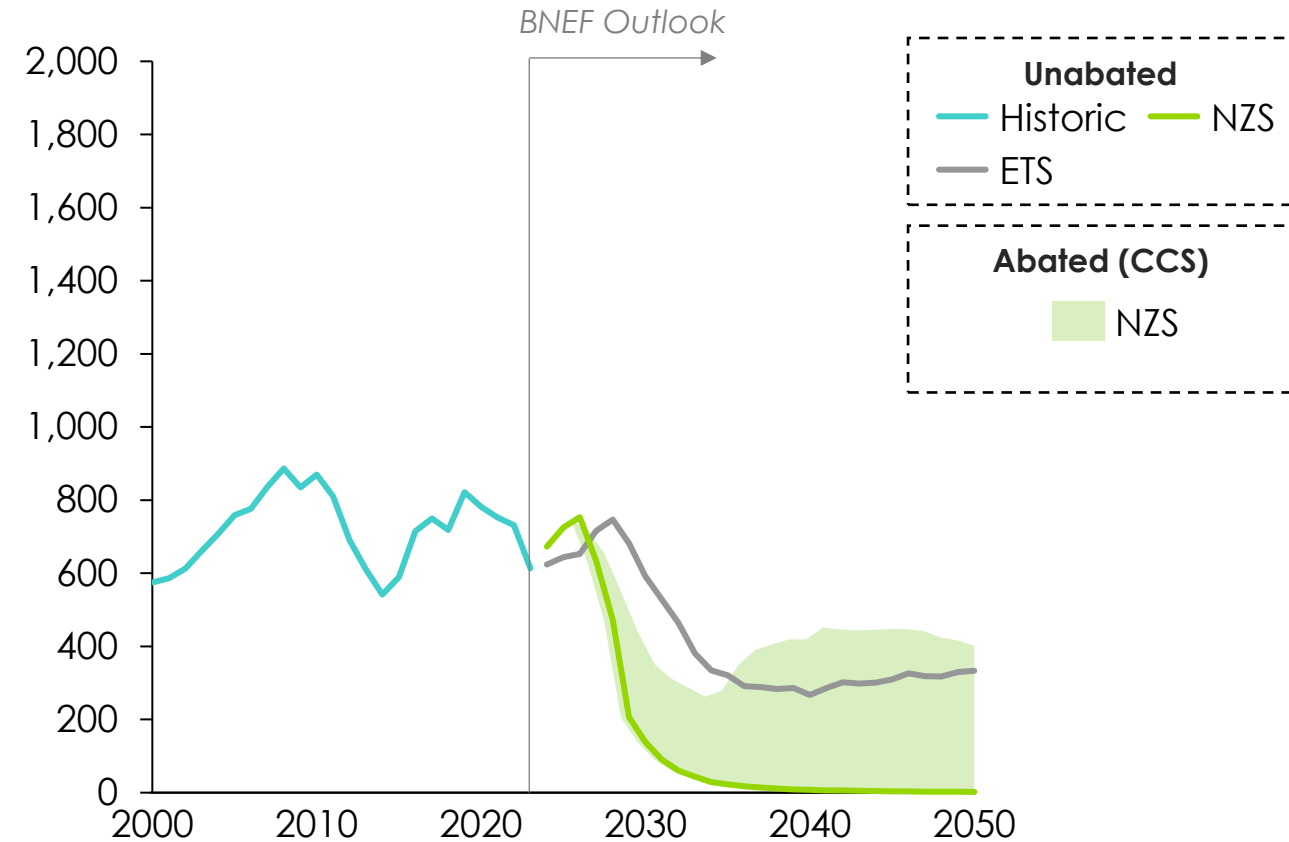
BNEF, Europe Gas consumption, Buildings Final energy

TWh



BNEF, Europe gas-fired power generation

TWh



Source: Systemiq analysis for ETC; BNEF New Energy Outlook 2025;

Agenda

- Key opportunities to accelerate clean electrification
- China: finally decreasing coal dependency?
- India: unparallel potential for solar
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- Solarizing Africa: opportunities to leapfrog to clean electrification
- Europe: decreasing reliance on gas

• Next steps



Next steps

Analysis

- **Clean electrification:** Finalise key regional and sector metrics, cost-of-action analysis, priority public policies and responsible near-term targets, integrating the new BNEF NEO when ready
- **Hard-to-electrify sectors:** Focus of the next section, assessing decarbonisation levers by industry and in regions with high production volumes and carbon intensity, as well as the enabling infrastructure required to decarbonise these sectors, including hydrogen and CCS
- **Methane emissions from fossil fuels:** Stress-test fossil methane reductions against *Keeping 1.5°C Alive* work from ETC (2021), distinguishing between automatic declines from fossil fuel phase-down and additional abatement needed by 2030 across coal and oil & gas.
- **AFOLU (agriculture, food, agriculture and land use):** Clarify assumptions on diet change, agricultural best practices and land-use outcomes, and define a transparent treatment of forest protection, restoration and management across scenarios, building on existing partner work and specialist interviews (e.g. Food and Land Coalition, WRI, Shell Venture Capital, Environmental Defense Fund, IIASA).
- **Removals:** Refresh removals assumptions against ETC's previous work, clarifying the credible role, scale and timing of removals within a well-below-2°C pathway.

Engagement

- **Continue targeted discussions with priority stakeholders in key geographies** to test emerging findings and sharpen the implications for policies, targets and sequencing.





Energy Transitions Commission

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