



Energy
Transitions
Commission

Evolving ETC ways of working: initial plan for strategy evolution beyond 2026

Agenda

- **Highlights from 10 years of ETC, and 2026 so far**
- **Initial view on longer-term ETC priorities:**
 - Key strategic issues and focus
 - Working with Artificial Intelligence tools
 - Communications strategy refresh update



2026 highlights so far: Agile comms in action

Adair & Mike on Iran



ADAIR TURNER
 ENERGY TRANSITIONS COMMISSION
 Chair, Energy Transitions Commission
 Chair, UK Financial Services Authority, 2008-2013
 Director General, CBI, 1995-2000



AGENDA

Advisers tell Starmer and Reeves to drill for more North Sea gas

Group of business leaders, unions and policy experts say national assets must be better utilised to cut reliance on imports, generate revenue and support jobs



Turner, who is now chair of the Energy Transitions Commission, an influential energy think tank highly regarded by Miliband, also called for the government to assess its North Sea strategy in light of the conflict in Iran.



ELECTRIC POWER, NATURAL GAS, ENERGY TRANSITION, RENEWABLES, HYDROGEN
 March 10, 2026

Fog of war clouds European energy transition outlook, exposes gas 'Achilles heel': experts

S&P Global
 Market Intelligence

Jules on Fossil Fuels Phase Out



Jules Kortenhorst · 1st
 Cochair of the #Energy Transitions Commission, a global coaliti...
 6d · 🌐

We keep hearing the wrong story about fossil fuels.

The familiar number – that fossil fuels supply 80% of global ...more

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In Santa Marta and at IMO meeting in London, could Iran war invigorate talks to exit fossil fuels?

“The most important thing to come out of Santa Marta is specific action plans related to clean electrification,” and on how to address the current price premium of decarbonisation options in hard-to-abate sectors.

E&ENews by POLITICO

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CLIMATEWIRE

Hard choices test breakout climate summit

05/01/2026 06:15 AM EDT

Colombia's Environment Minister Irene Velez (left) and the Netherlands' Climate and Green Growth Minister Sientje van Veldhoven oversee the International Conference on the Just Transition Away from Fossil Fuels in Santa Marta, Colombia.

Countries Draw Up Next Steps to Decarbonize at Colombia Fossil-Fuel Summit

The conference in Santa Marta ended on an optimistic note, with plans for a second meeting in 2027.

Bloomberg UK

Colombia hosts first meeting to quit fossil fuels as energy crisis worsens



Energy Intelligence
 ENGAGING INSIGHT | LEADING DECISIONS

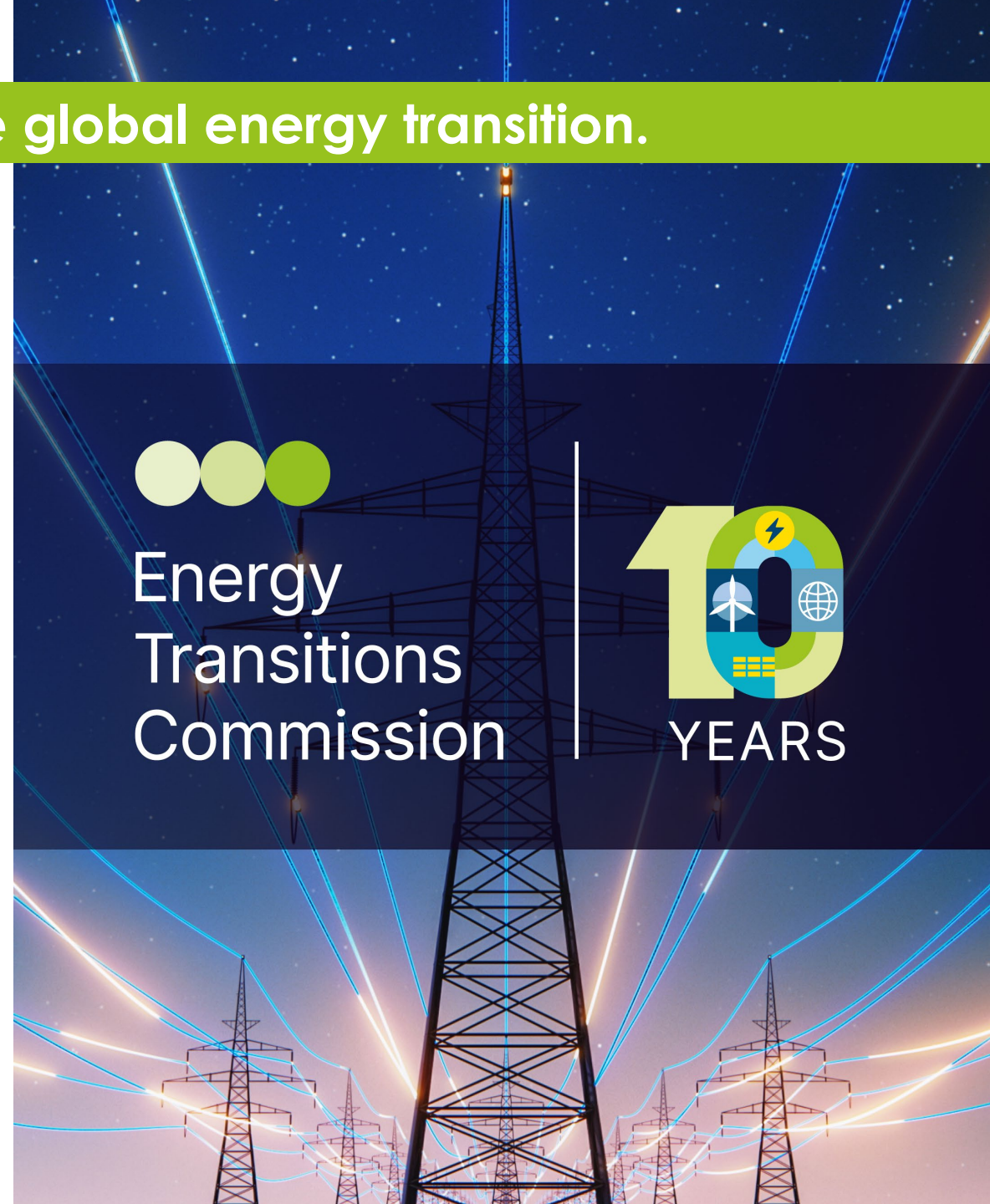
In Conversation With: Jules Kortenhorst

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The ETC exists to accelerate the global energy transition.

- **With 50 major reports** (& more with partners) widely cited across policy & industry and 100,000+ report downloads this decade, the ETC is a defining analytical voice in the energy transition.
- **ETC's 50+ global members provide** industry-backed analytical reports and briefings defining credible decarbonization pathways — costs, trade-offs, policy and investment priorities



Energy Transitions Commission

A Decade of Distinctive Impact (2016-2026)



Shifted the global narrative on net zero

- Mission Possible (2018) showed **100% decarbonisation is possible**
- Influenced **IEA's first Net Zero scenario** (2021); shaping mainstream adoption globally



Established electrification as the backbone of the transition

- Demonstrated **electricity** can rise from ~20% to > **60-65% of final energy demand**
- IEA and IRENA continually revise up share closer to ETC perspective



Catalysed action in hard-to-abate sectors

- Mission Possible (2018) created the **Mission Possible Partnership** which accelerates Final Investment Decisions in low-carbon industry
- Spawned the **Industrial Transition Accelerator** driving projects to FID



Driven country-level impact

- Role supporting **China's net-zero 2060 commitment**
- Interventions to shape the transition: Australia, India, Europe, Indonesia, US, Sub-Saharan Africa, Japan, Canada and beyond



Built global analytical clout, based on public-good knowledge base

- Regularly invited to contribute in leading platforms (COP, UNFCCC, OECD, WTO, Ministerials) and Tier 1 media (Economist, FT, CGTN)
- 50 major reports (& more with partners), widely cited



10 years of ETC – public launch (1)



Interactive website timeline

2016-17 – From Paris Ambition to Practical Pathways

The Paris Agreement enters into force, committing countries to limit warming to well below 2°C by mid-century.

The Energy Transitions Commission is launched to turn climate ambition into practical decarbonisation pathways. Its first paper, [Shaping Energy Transitions](#), shows that falling costs and technological progress make a zero-carbon electricity system achievable. In [Pathways From Paris](#), ETC analyses national climate pledges and identifies the key policies needed to accelerate emissions reductions.



Caption: XXX



2018 – Evidence Shows Heavy Industry Can Decarbonise

The IPCC Special Report on 1.5°C places net-zero emissions at the centre of climate pathways, bringing heavy industry into sharper focus.

ETC's landmark report, [Mission Possible](#), shows that steel, aluminum, chemicals, cement and long-distance transport can reach net-zero by mid-century. The analysis demonstrates to business and policymakers that decarbonising energy-intensive sectors is technically achievable.



Caption: XXX



2025 – Renewables deliver more electricity than coal for the first time

China's emissions appear to have peaked; renewables generate more electricity than coal for the first time globally.

The ETCA strengthens the evidence base for clean electrification as the backbone of resilient, competitive net-zero economies. Its analysis shows that [Transforming Power Systems](#), [Decarbonising Buildings](#), and improving [Energy Productivity](#) can cut emissions, lower system costs and improve energy security.



Caption: XXX

Caption: XXX



2026 and Beyond: Scaling the Zero-Emissions Economy

A decade after the Paris Agreement, the world remains off track to meet climate goals.

Over 10 years, ETC has helped provide the evidence, shape policy frameworks and mobilise industry and regional partnerships needed to decarbonise power, industry and transport. The Commission is committed to [keeping global warming well below 2°C](#) by accelerating the solutions that will scale the global energy transition.



Caption: XXX

Caption: XXX

Explore the milestones below to see how the ETC's work and the energy transition have evolved over the past decade.



10 years of ETC – public launch (2)

Postcards from the energy transition series

POSTCARD From China

Electric trucks are taking over



Geely's Homtruck - launched in 2024

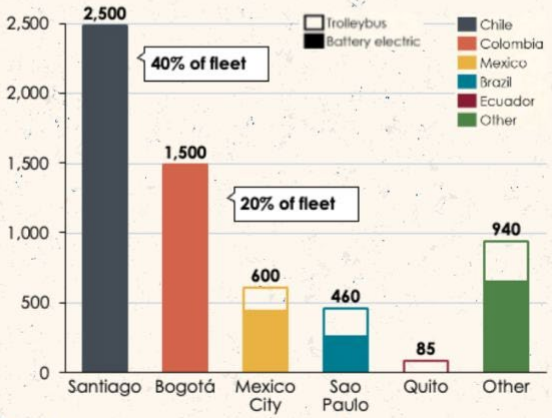
In just two years, electric trucks in China have surged from 8.6% market share.

- Adoption is skyrocketing
 - €150k lifetime savings vs diesel
 - 230,000 sold in 2025 year-on-year
- Europe is lagging, with low market share for electric trucks

POSTCARD From Chile

Latin America's total e-bus fleet has grown 8x in 7 years, from 800 → 6,000

Latin American e-bus fleet by city
Total number of e-buses, end of 2024



City	Total e-buses	% of fleet
Santiago	2,500	40%
Bogotá	1,500	20%
Mexico City	600	
Sao Paulo	460	
Quito	85	
Other	940	

- Two cities are leading the charge:
 - Santiago: 40%+ of domestic fleet
 - Bogotá: 20%+ of domestic fleet
- Impact at scale:
 - 60 million litres less diesel used in Santiago - cutting costs and improving air quality
- Ambitious targets to be met:
 - Santiago is on track to meet target of 4,400 e-buses by mid 2026, 68% of total fleet



ETC 2.0: Our Theory of Change: From Outputs to Real-World Impact



OUTPUTS

Rigorous, industry-backed analytical reports and briefings defining credible decarbonization pathways — costs, trade-offs, policy and investment priorities



OUTCOMES

Observable changes in corporate strategies, policy decisions, and investment commitments in key geographies — the decisions that actually move the energy system



IMPACT

Measurable acceleration: faster clean technology deployment, reduced emissions trajectories, and demonstrable progress toward a Paris-aligned pathway

The ETC must now complement its role as a 'think tank' with that of a 'change agent' — bridging the gap between analytical possibility and real-world implementation



Initial hypothesis on strategic focus areas for 2026-2030

Thematic & geographic priorities (non-exhaustive)

Clean electrification, especially in the sunbelt



Elevate the case for rapid solar deployment, enabling grids, finance solutions and AgriPV to increase land productivity across Africa and the global sunbelt

Defending European policy



Sustain the coalition behind EU/UK climate commitments on power, industry (CBAM) and transport by strengthening the evidence on affordability and competitiveness

Carbon pricing & markets



Drive policy momentum for carbon pricing in heavy industry, especially China, through decision-ready briefings for ministries and regulators

100% Net Zero ambition



Maintain full energy-system coverage in plans (bioenergy, hydrogen, fossil fuels, CCS) and defend robust long-term targets against dilution

India: challenge & opportunity



Accelerate renewables integration, grid build-out, market reform, end-use electrification, hydrogen and AgriPV through targeted analysis

Southeast Asia: unlocking ambition



Diagnose barriers to ambition (political economy, fossil lock-in, grid constraints) and build a locally resonant case for change with national champion corporates

China: ambition and leadership



Promoting strong ambition and extending technological leadership to HTE sectors, including through embrace of Chinese technology & implementation of carbon pricing.

Cross-cutting capabilities and approaches

Advocacy in decision-making venues



Systematically engage leaders in boardrooms, investor forums and negotiations with tailored, decision-ready materials that clarify facts and trade-offs

Countering misinformation



Build rapid-response capability to anticipate, rebut and neutralise misinformation tropes that threaten policy durability or investment momentum

Decision-relevant data & tools



Improve accessibility of core data, models and insights (including AI-enabled tools) so decision-makers can make evidence-based choices



Key areas under consideration

1

Coalition Model

Deeper partnerships with peers and multilaterals to amplify reach and credibility

2

AI-Powered Modelling

Exploring how to best use AI tools in energy systems analysis

3

Amplified Comms

Proactive, agile and AI-first communications to scale reach, counter misinformation and reach C-suite

4

Expanded Membership

To deepen legitimacy and broaden reach. Diversify geography and sector representation

5

Regional Impact

Scalable programmatic impact in key G20 markets — translating global analysis into country-level change



Plan to iterate ETC Strategy with Commission



Member portal modelling showcase



Model Hub

etc@etc.com SIGN OUT

AI-Powered Modelling

Electrolyser

ELECTROLYSER UTILISATION 20%

Storage cycling

H2 / CH4 STORAGE CYCLES/YR 12

IRON-AIR CYCLES/YR 6

Turbine selection

GREEN H2 TURBINE

OCGT CCGT

E-CH4 TURBINE

OCGT CCGT

Gas + CO2 prices

NATURAL GAS PRICE 6 \$/MMBtu

DAC CO2 COST 234 \$/t

BIOGENIC CO2 COST 30 \$/t

POINT-SOURCE CO2 COST 50 \$/t

CARBON REMOVAL COST 200 \$/t

← BACK TO HUB



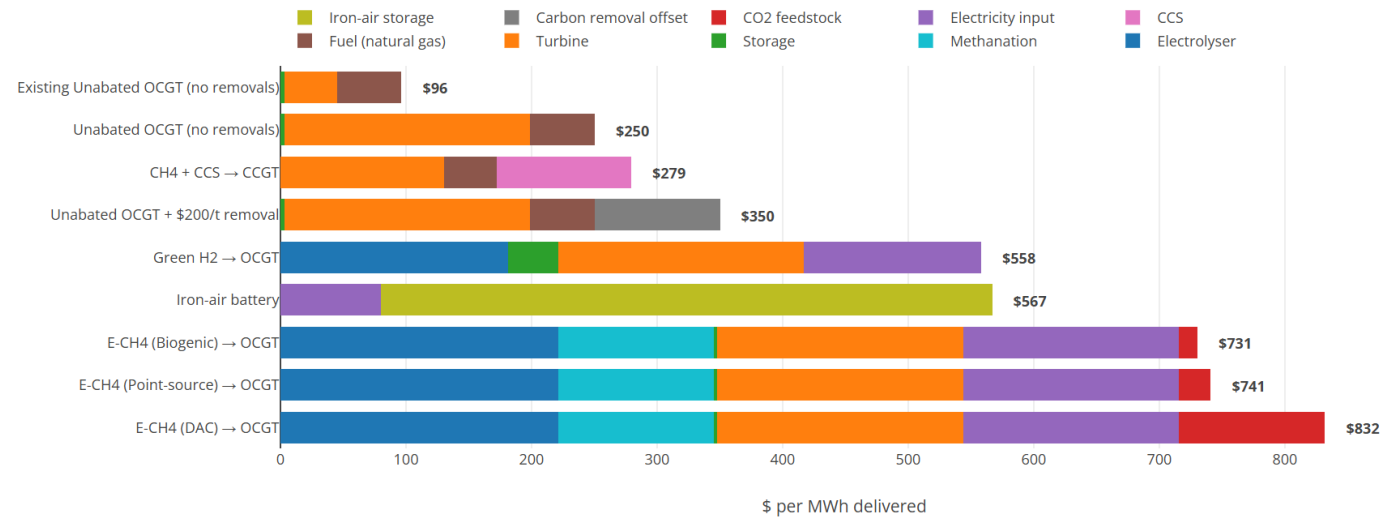
Seasonal Storage Economics BETA

LCOS calculator for ultra-long duration (50h+) storage pathways. Methodology aligned with ETC (2025) Power Systems Transformation.

LCOS COMPARISON SENSITIVITY 2D HEATMAP LCOS METHOD ASSUMPTIONS

Levelised cost of storage, \$ per MWh of delivered electricity

Region: Ex-China · Year: 2050 · Electricity input: \$40/MWh · OCGT util: 5% · CCGT util: 10% · Electrolyser util: 20%



Comms refresh: Consensus on the ETC's value

1. Depth and rigour of analysis
2. International viewpoint
3. Political neutrality with policy conviction
4. Credibility as an independent, trusted voice
5. Access to senior policymakers and business leaders

*"The two things that make ETC distinctive: one is that you bring a **global perspective** and the second is the **rigour and depth of the analysis.**"*

*"I struggle to think of any other organisation that's taking the **global perspective** that you're taking."*

*"The **quality of analysis** and research and the **credibility** that you've got is phenomenal."*



Comms refresh: Expectations for the future

"If you've got an existing piece of analysis then you should be **jumping in quickly** to pull the results of that analysis out to **inform the live debate**. And goodness knows we need more informed debate."

"You need to **get companies out there** talking about how we make this happen from a practical, concrete perspective. That will move the debate from culture war to actionable progress."

"**Do global, but also go local**. If ETC wants to land in India, it needs Indian examples and data — not a repurposing of European narratives."

"You have people who call themselves non-believers already, and it's growing. If we don't **open ourselves to have those conversations**, other people will, influencing policy makers heavily. By the time we come in with facts and arguments — they won't listen."



Comms refresh: Key drivers for success

1

Reframe the message

Lead with security, affordability and resilience
— not just climate

2

Go always-on

Rapid response capability + content cascade
from every report

3

Go local

Build in-market presence — local data, local
voices, local examples

4

Amplify member voices

Forward-leaning members as active co-
communicators, not just endorsers

5

Optimise for AI

GEO strategy — ensure ETC analysis surfaces
in AI-generated answers

6

Counter misinformation

Assured fact-base + business coalition
endorsement + rapid rebuttal function

