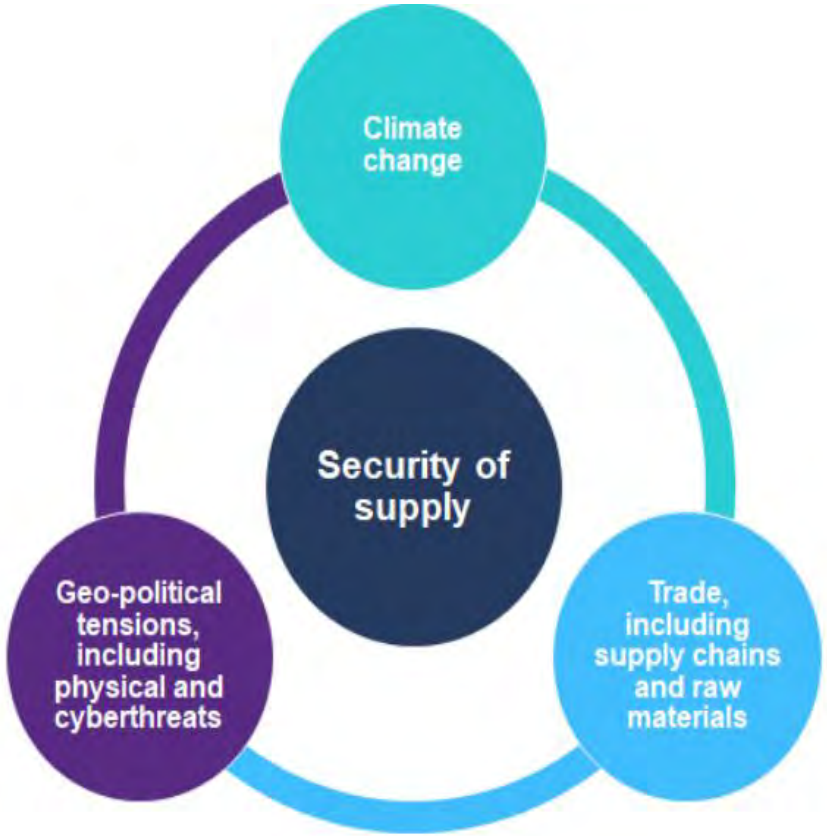
The different dimensions of the concept of Strategic energy autonomy



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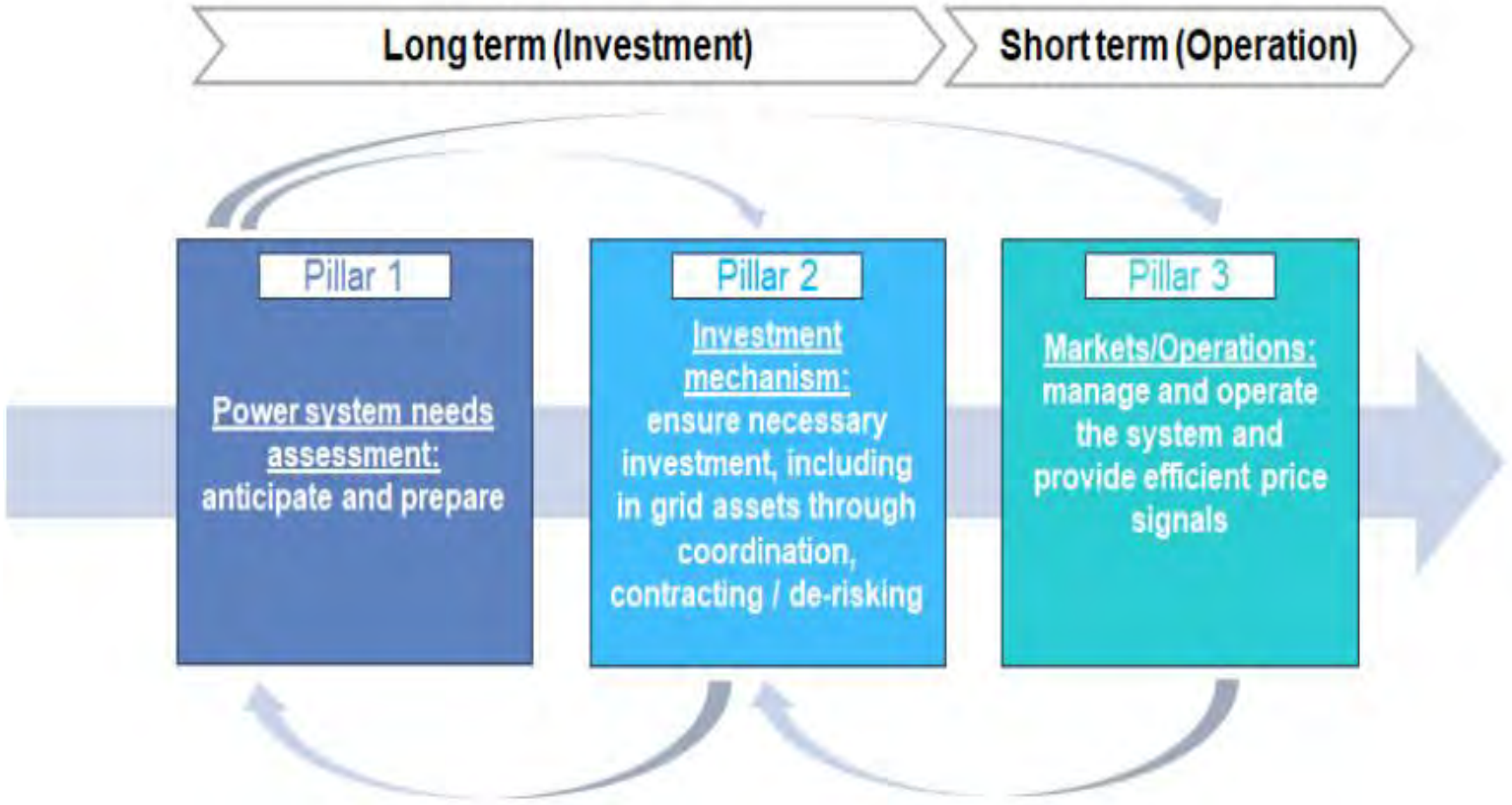
The three key pillars to ensure security of supply in the electricity sector

- Pillar 3 - Benefits of EU market integration – frequently recalled in Letta and Draghi reports
- But what market and how? Need to consider multiple product markets and their interaction
- Short term 'energy only market' - benefits now disputed ?



Pillars 1and 2

Impact of rising RES shares -> dramatic surge in solar and wind across the EU	Problems of intermittency, immense price volatility ‘ dunkelflauten’	Impact on capacity adequacy – system security and reliability	Grid investment - transmission, distribution and cross border involve huge investments
Who will make that grid investment and can it be made on time?	De-risking - ‘crowd in’ private investment BUT can TSOs/DSOs encourage private investment?	Draghi’s idea of a ‘28th Member State’ to speed up permitting – ‘pie in the sky”?	But what about cross-border infra? All EU targets systematically missed for over a decade

Physical autonomy v Data autonomy?

- Greater emphasis on physical ‘resilience’ along the value chain

- Integrating NZIA, for enhanced market access for clean and efficient decarbonsiation strategies

- **But strategic energy data autonomy??? Missing in action????**

- **See Hancher and De Hauteclocque , ‘**EU strategic energy autonomy and the electrification strategy’, RSC Working Paper 2025/51