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European Energy Colloquium

The ERAA wake-up call: How secure is Europe's energy supply?

Brussels, 19 November 2025 – The ENTSO-E European Resource Adequacy Assessment (ERAA) 2024 issues a strong warning about the growing risks to European electricity supply security. The analysis indicates that the rapid phase-out of fossil fuels could lead to a critical supply gap by 2030, especially during peak demand periods. The risks of insufficient generation capacity are increasing across several regions. To maintain stability, Europe must significantly accelerate the deployment of flexible capacities and the expansion of grid infrastructure. The report stresses that, without clear policy incentives and investments, the balance between climate goals and security of supply is at risk. In the framework of the European Energy Colloquium, the Forum für Zukunftsenergien discussed the core findings of the ERAA report and its implications for the future of Europe's energy supply with a representative of the Commission and representatives of the various sectors.

Patricia Labra, Chair of the ENTSO-E System Development Committee, provided an overview of the latest European Resource Adequacy Assessment (ERAA) report, explaining that significant fossil fuel capacity was likely to become economically unviable by 2030. The analysis indicated that appropriate incentives or targeted measures would be necessary to effectively mitigate resource adequacy risks, specifying that these should include long-term market mechanisms designed to provide efficient price signals to operators. Ms. Labra highlighted a key challenge in the changing energy mix, noting that although renewable generation capacity was projected to expand, this variable capacity would not be sufficient to offset the expected decline in dispatchable thermal generation and the simultaneous growth of electrification by 2035. Consequently, the assessment concluded that Europe must significantly accelerate the deployment of flexibility solutions and infrastructure. This also includes cross-border transmission networks and storage solutions to ensure electricity security and meet climate targets. Finally, the report pointed out that National Resource Adequacy Assessments (NRAAs) offered a complementary, detailed perspective on national specificities and, when used alongside the ERAA, could serve as an important tool for informing Member States and regulators about the projected security of supply to guide market decisions.

Daniel Ihász-Tóth, Team Leader - Security of Supply, Energy System Needs from ACER, described how the latest assessment of the ERAA report confirmed the current robust state of the interconnected European electricity grid, while emphasising the need for strategic, coordinated measures to mitigate future risks. Data from 2024 showed that power outage times in the EU averaged less than two hours per year, with the assessment noting that none of the outages were due to insufficient power supply. Instead, extreme weather events such as heat waves and floods were cited as factors. Despite this short-term stability, the ERAA report identified significant supply risks in the longer term, which are often not reflected in medium- and short-term assessments, Mr. Ihász-Tóth explained. This reflects the inherent uncertainty in

capacity and demand forecasts over a longer period. Regarding costs and efficiency in particular, Mr. Ihász-Tóth explained how the assessment highlighted that the costs of capacity mechanisms were on a steady upward trend. In relation to flexibility, he noted that measures were increasing across Europe and that costs were likely to rise sharply in the future. Grid-connected battery storage was identified as the main beneficiary of flexibility measures, and the report emphasised that the full contribution of each resource to both flexibility and adequacy should be assessed collectively to enable efficient decision-making.

In the panel discussion moderated by **Ulrike Drachsel**, Managing Director of the Forum für Zukunftsenergien, **Annamaria Marchi**, Deputy Head of the Internal Energy Market Unit from DG ENER, **Dr. Pierre Gröning**, Executive Director EU Liaison Office Brussels at the German Chemical Industry Association, and **Martin Kaspar**, Head of EU Energy Policy from Thüga Aktiengesellschaft, discussed security of supply in Europe.

The panellists argued that decarbonisation requires massive investment in flexible capacities and grids. This must be promoted through support mechanisms such as capacity mechanisms. A point of contention was the implementation of these mechanisms and planning authority. While Ms. Marchi emphasised the importance of functioning markets and the EU framework, Mr. Gröning called for lower costs, faster approvals, and regulatory simplification. Mr. Kaspar questioned the reliability of top-down planning instruments such as ERAA and insisted that local security of supply and the n-1 criterion must be the primary basis for all decisions to ensure customer acceptance. Nevertheless, he concluded that the ERAA report is currently the best method. The impact of Dunkelflauten (lull in energy from the wind and solar sectors) on security of supply and the effects of battery storage were also discussed.

We thank the Rhineland-Palatinate State Representation in Brussels for its hospitality!

The presentations will soon be available for members of the Forum für Zukunftsenergien e.V. to download from the website (Press/Publications). If you or your company/institution are members of the Forum für Zukunftsenergien and do not yet have access data, please send an email to: info@zukunftsenergien.de.

About the Forum für Zukunftsenergien e.V.

The Forum für Zukunftsenergien is the only industry-neutral and politically independent institution in the energy sector in the pre-parliamentary arena in Germany. The registered association promotes renewable and non-renewable energies as well as rational and economical energy use. Its goal is to promote a secure, affordable, resource-efficient and environmentally friendly energy supply. The association has approximately 230 members from industry, the energy sector, associations, research and service institutions, as well as prominent figures from politics, business, science and administration.

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