

European Resource Adequacy Assessment 2026 - Stakeholder Webinar on Preliminary input data

25 February 2026



Agenda and practical matters

- 1** Welcome and context of ERAA
Daniel Huertas Hernando - Vice-convenor of ERAA 2026 Steering Group (Elia)
- 2** Data collection process
Daniel Keogh - Market Modelling Expert (ENTSO-E) for SD Planning & Implementation Team
- 3** Insights on ERAA 2026 preliminary data
Nils Müller - Convenor of ERAA Market Study Team (Amprion)
- 4** Q&A
Lukas Galdikas - Project Manager (ENTSO-E)

Questions welcome on Sli.do

#2108418



Webinar is recorded and will be published on ENTSO-E website.



Welcome and context of ERAA

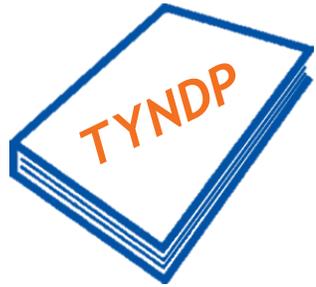


Daniel Huertas Hernando

Vice-convenor of ERAA 2026 Steering Group (Elia)



Different risks are addressed within different timeframes



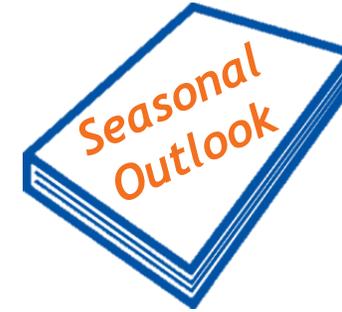
Long term

>10 years



Mid term

10 years 5 years



Short term

1 year 6 months 1 week



UNCERTAINTY INCREASES WITH TERM LENGTH



Role of the ERAA



Assess adequacy risks of the European power system in medium term / coming decade

With focus on Target Years 2028, 2030, 2033, 2035



Inform decision makers and stakeholders

Input for Member States to introduce capacity mechanisms



Strengthen Europe's energy transition

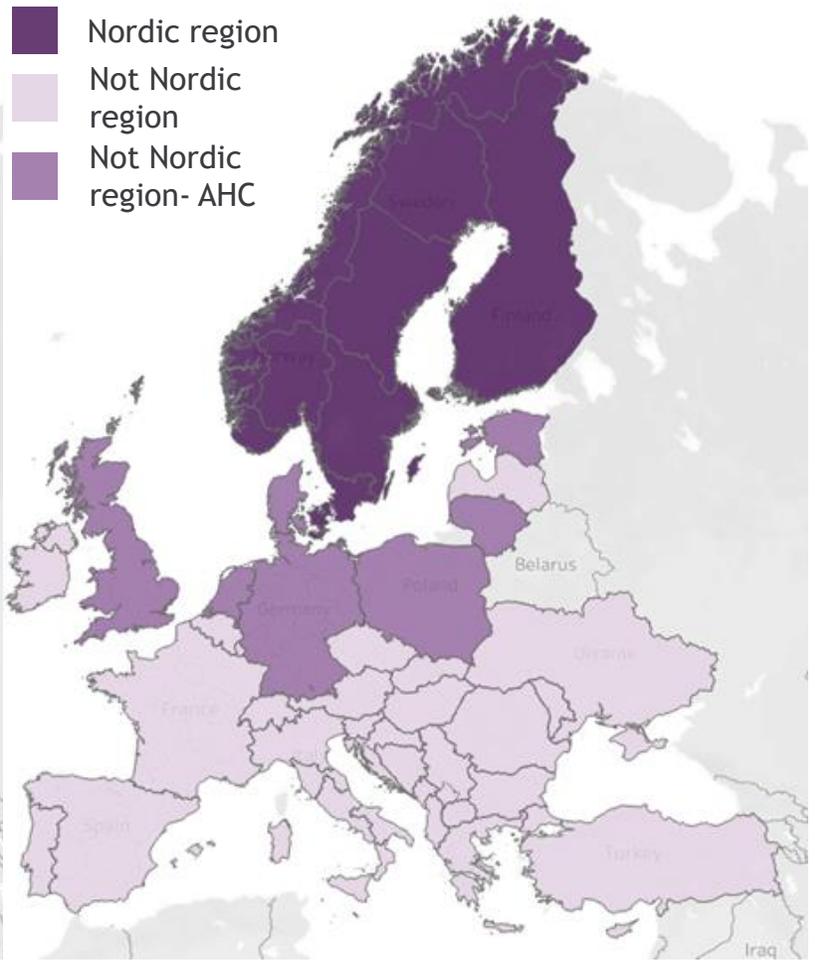
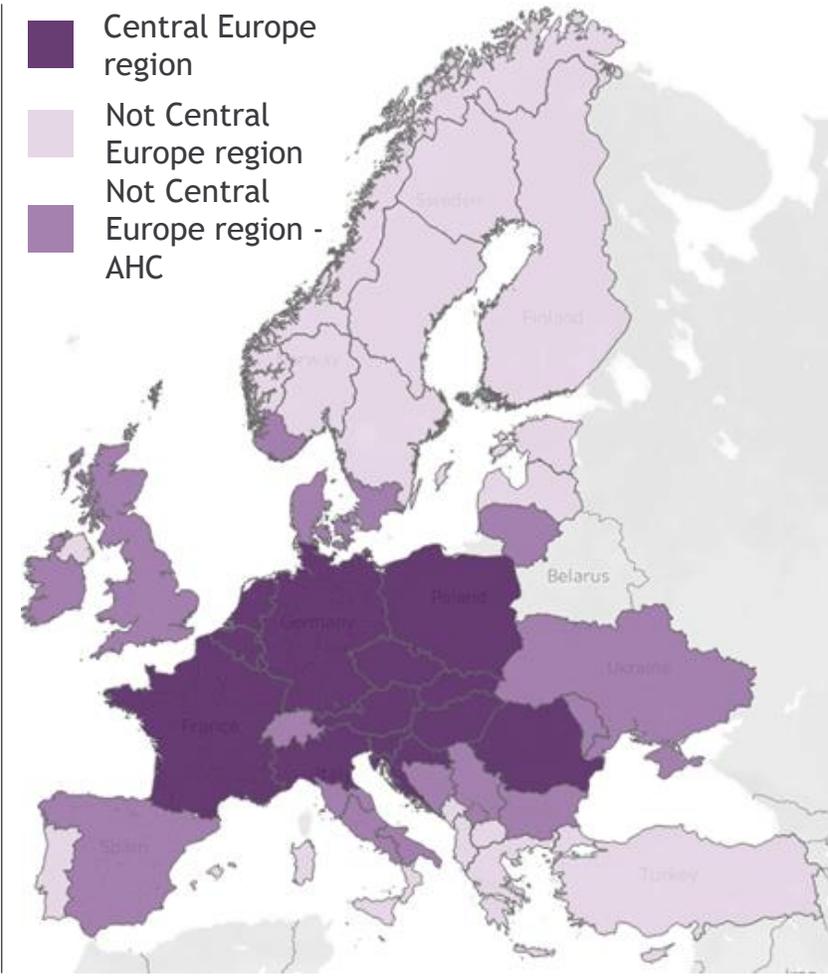
Transparent data, complementing other planning studies



The interconnected European power system modelled in ERAA 2026



ERAA 2026 geographical scope



Central Europe (left) and Nordic (right) flow-based market coupling region



ERAA 2026 objectives



Main objective: use revenue-based EVA for ERAA 2026 reference scenario.



Assess complementary Trends and Projection scenario.



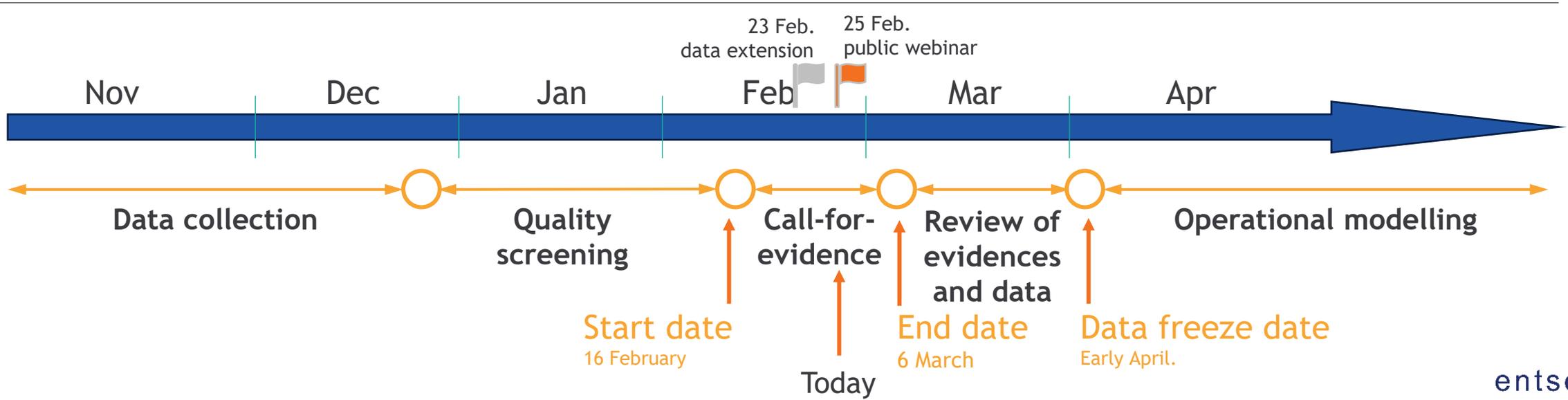
ACER's decision on ERAA 2025 is still pending. Impact on ERAA 2026 objectives to be assessed.



Other methodological refinements are under consideration. Those will be presented in summer stakeholder webinar.

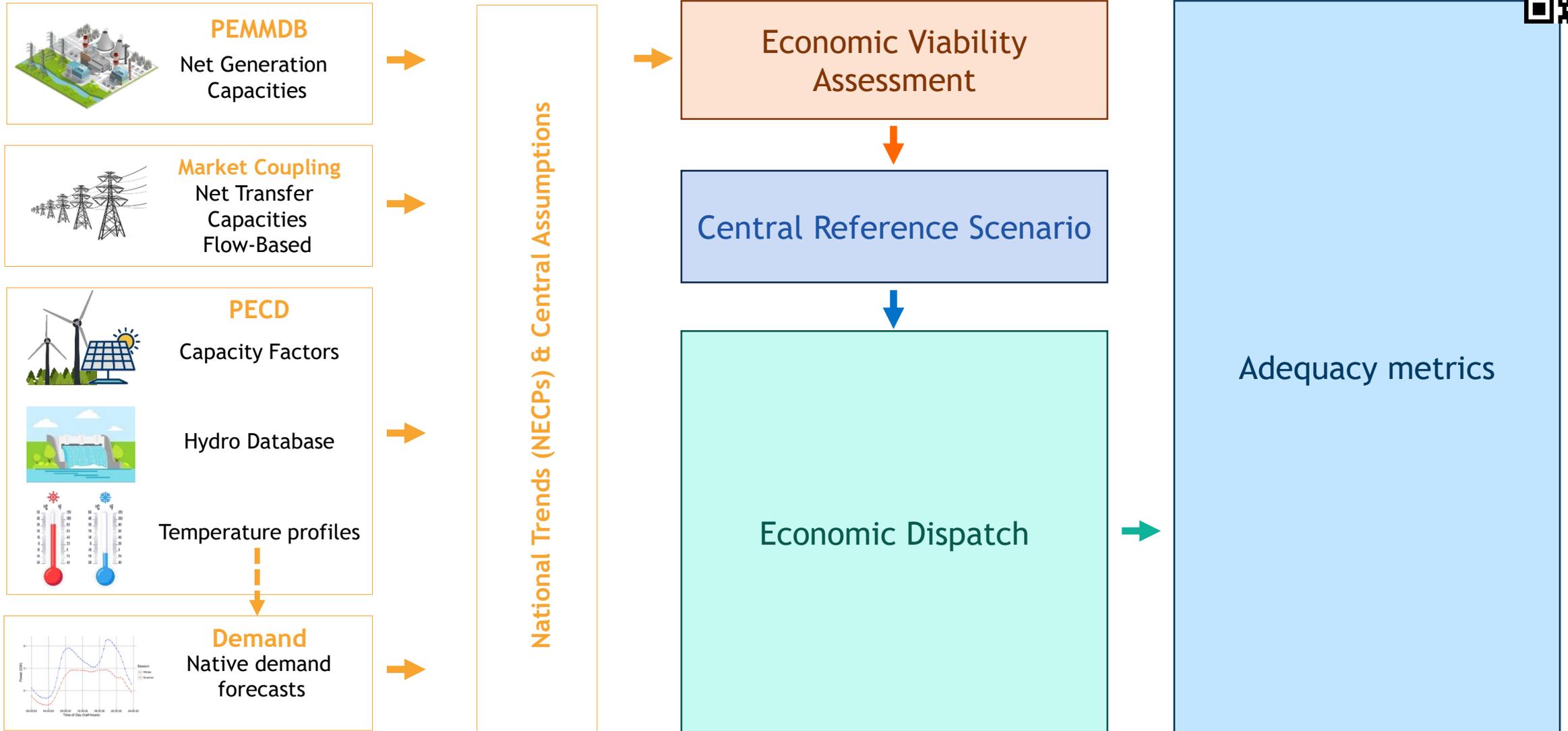


Call-for-evidence: ERAA 2026 input data





The framework of ERAA 2026





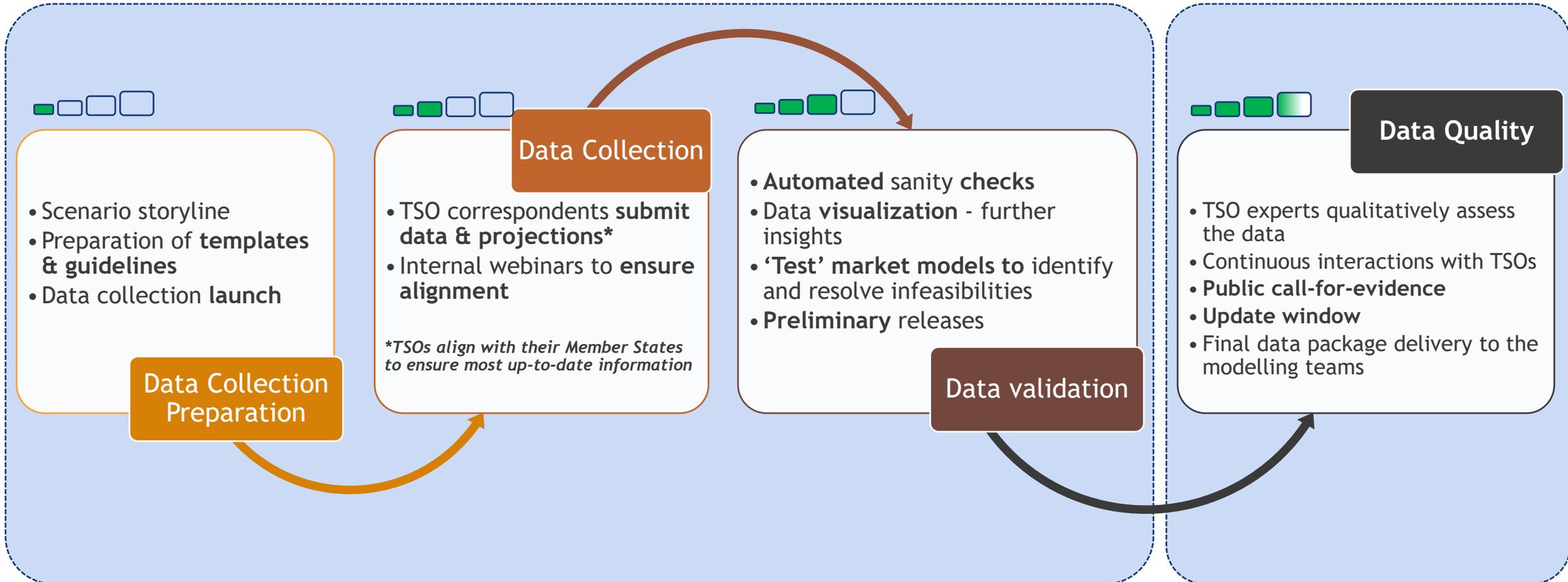
Data collection process



Daniel Keogh (ENTSO-E)
Market Modelling Expert

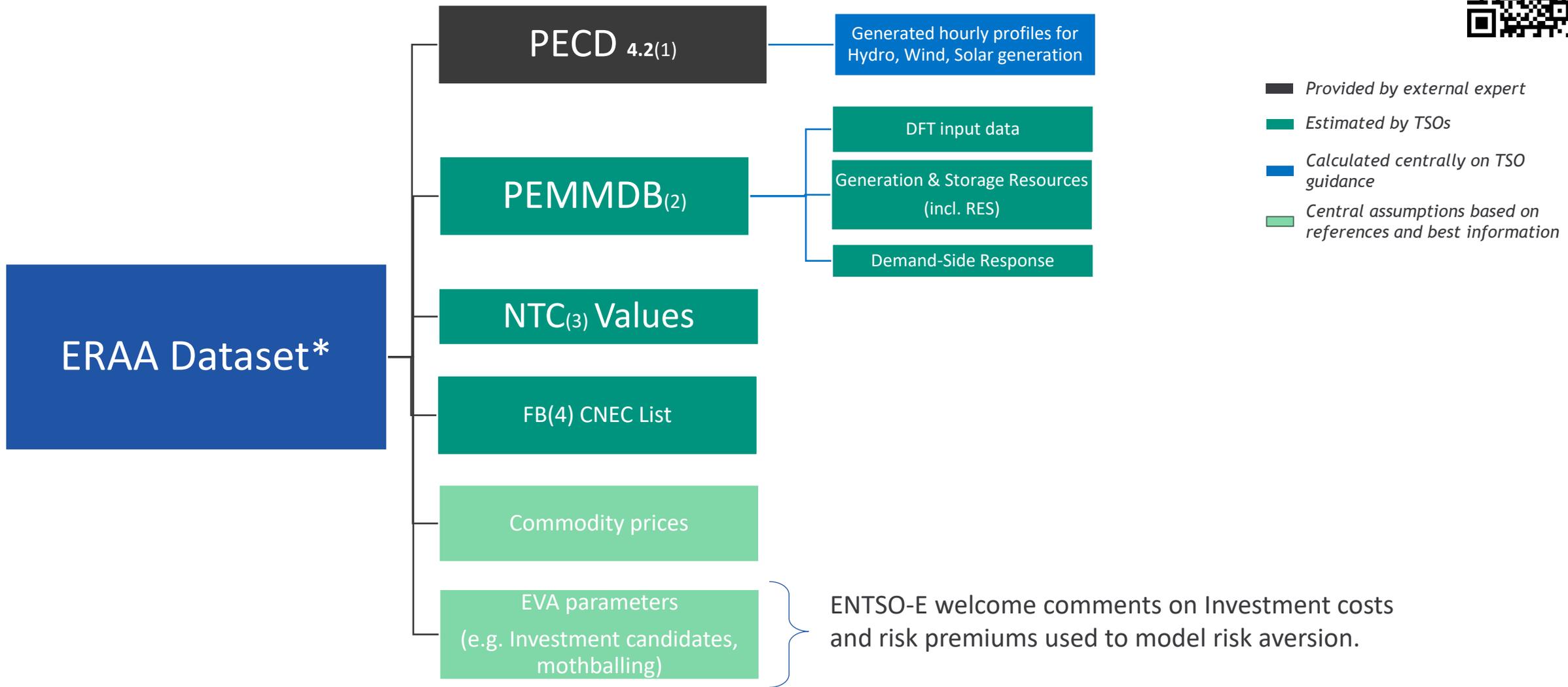


Data collection process





Data structure



*ERAA datasets are published by ENTSO-E.
 ERAA 2025 complete dataset: modelling data on ERAA 2025 [website](#).
 ERAA 2026 preliminary dataset: [ERAA stakeholder interaction website](#), and [consultation website](#)

(1) Pan-European Climate Database
 (2) Pan-European Market Modelling DataBase
 (3) Net Transfer Capacities
 (4) Flow-Based



PEMMDB, NTC & Demand

Key Dates:

- **PEMMDB and NTC** data collection ran from 2 October 2025 until 12 December 2025.
- **Demand** data collection ran from 2 October 2025 until 12 December 2025

Tools:

- **PEMMDB App** features automated validation checks and data cannot be submitted if datasets contain errors
- **Demand Forecasting Tool** creates forecast future demand profiles based on TSO input assumptions

Data Quality Taskforce Process:

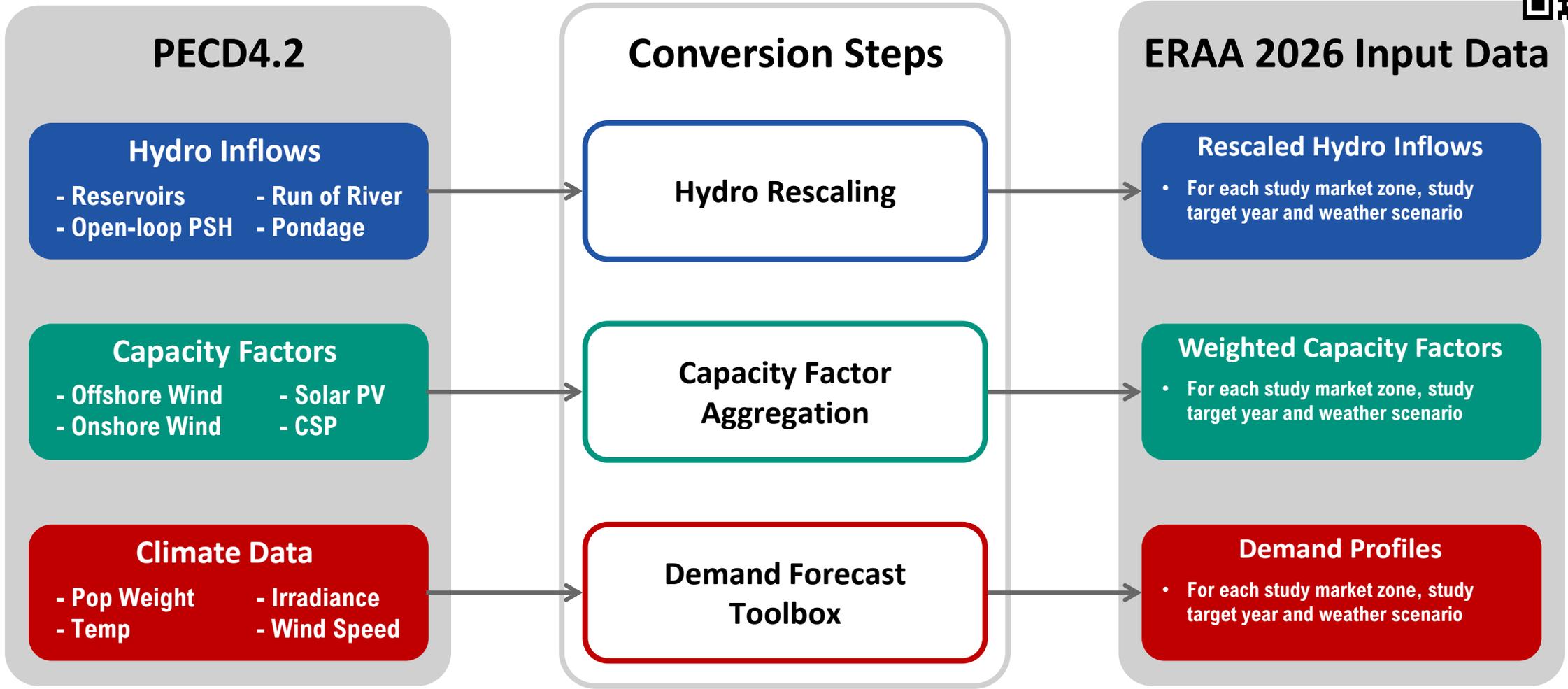
- TSO and ENTSO-E staff were assigned market nodes (including their own, if applicable) to perform qualitative checks using a set of high-level visuals.
- Data correspondents were invited to correct issues during an update window in January 2026

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PECD 4.2



PECD 4.2 represents projected weather scenarios (WS) modelled by 3 different climate models that account for the impact of climate change.



Insights on ERAA 2026 preliminary data



Nils Müller (Amprion)

Convenor of ERAA Market Study Team (Amprion)



Data Assumptions



Dataset constituted of TSOs data prior to the Economic Viability Assessment



Data available for the pivotal years: 2028, 2030, 2033, 2035



Installed Capacity as of 1 July. Unit- or technology-specific derating not accounted



Visuals only include Capacities which are available on the market



Electrolysers, Batteries & DSR include only explicit capacity on the market



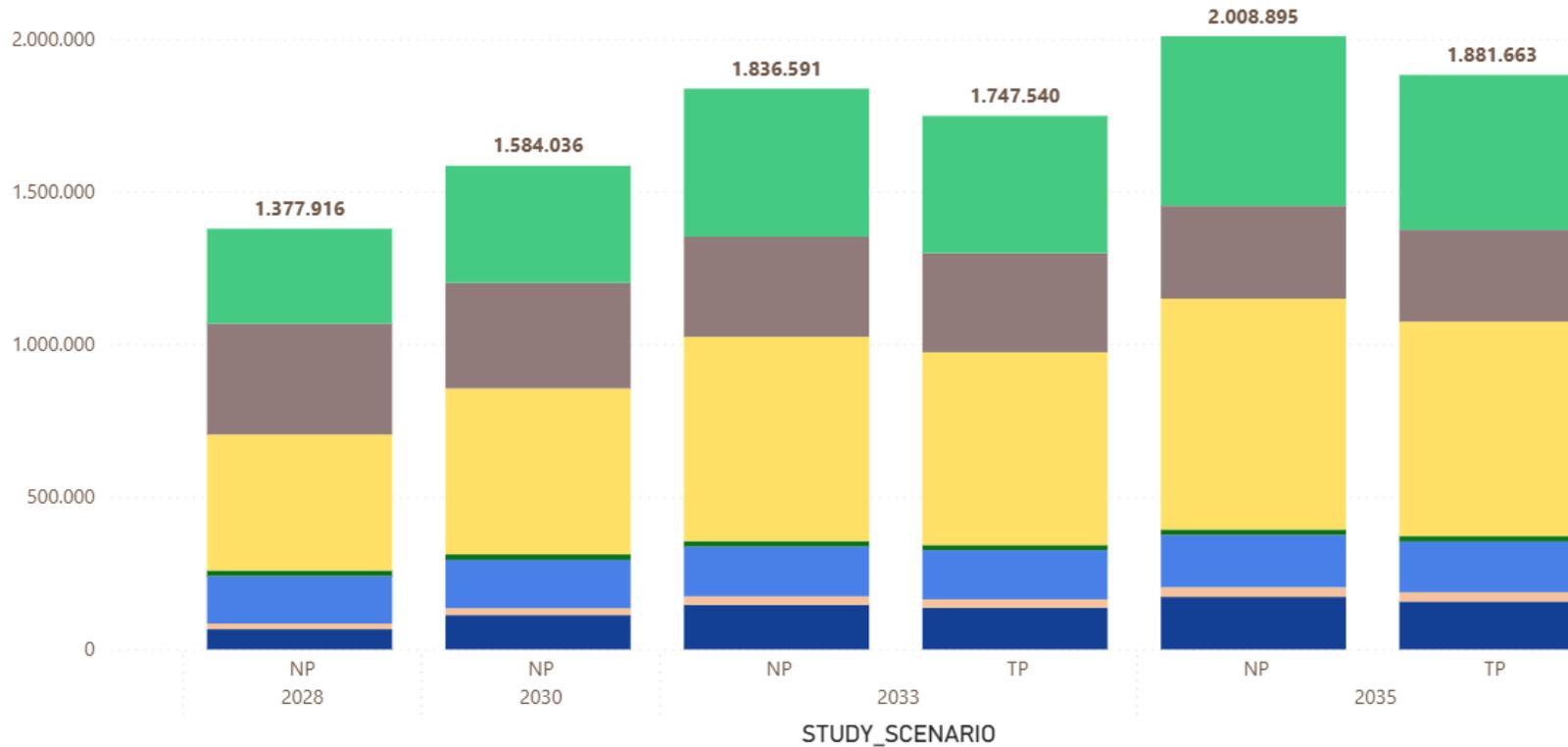


Glance on the data - supply

Domestic Market Supply Capacities [MW] - only EU countries

Domestic supply capacities [MW] per technology

● Battery ● DSR ● Hydro ● Others RES ● Solar ● Thermal ● Wind



Notable changes over the study horizon

Wind & PV are expected to expand notably (up to ~560 GW in NP scenario).

Thermal generation is decreasing by ~17% / 60 GW.

Battery* capacities increasing significantly and accounting for 157 GW (TP) to 172 GW (NP).

* Not yet including behind-the-meter batteries which also see a substantial capacity growth



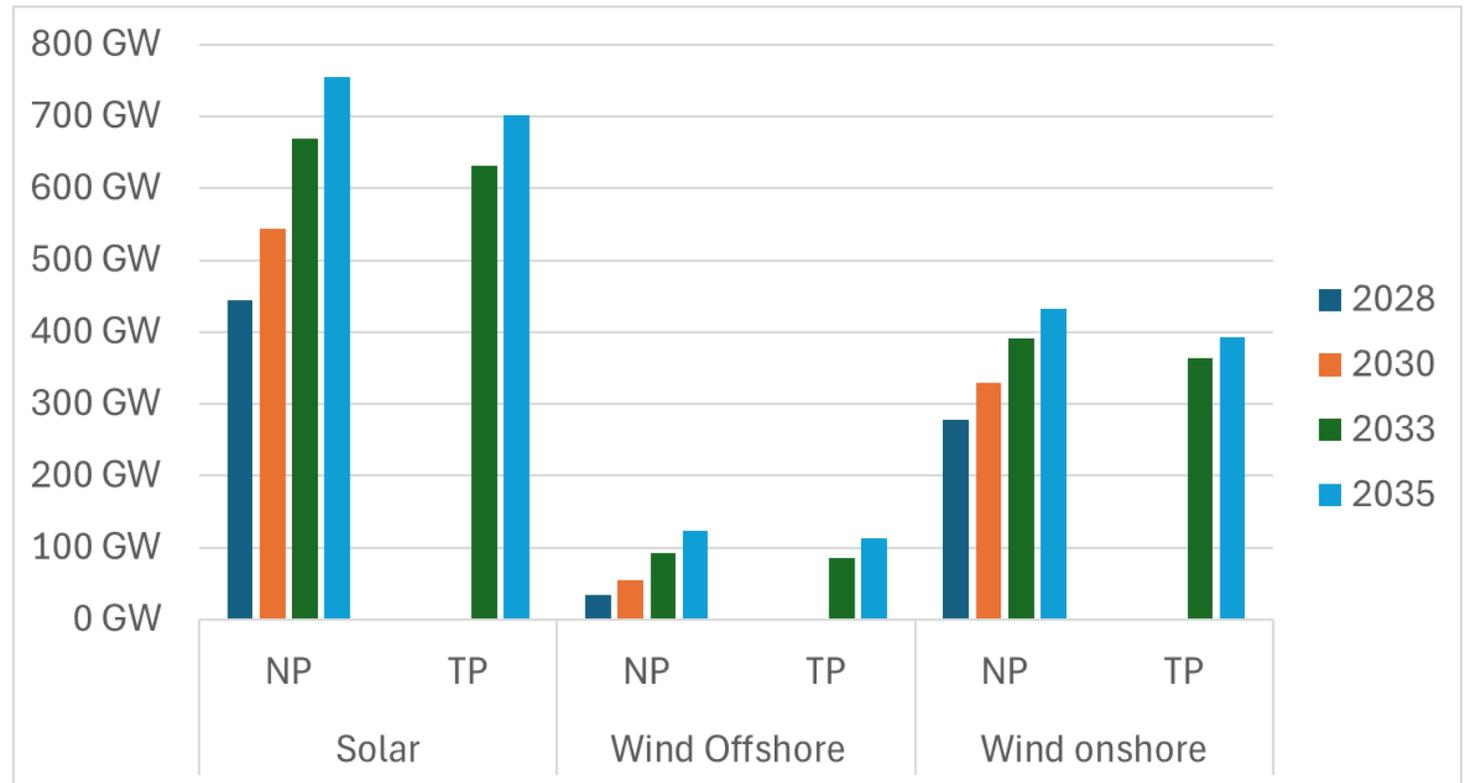
Capacity evolution: focus on Renewables

Wind and Solar capacities show a substantial growth over the study horizon.

T&P scenario shows a more moderate growth compared to NP scenario.

Installed Solar capacity exceeds 700 GW in 2035 in both scenarios.

Installed Capacities - EU countries





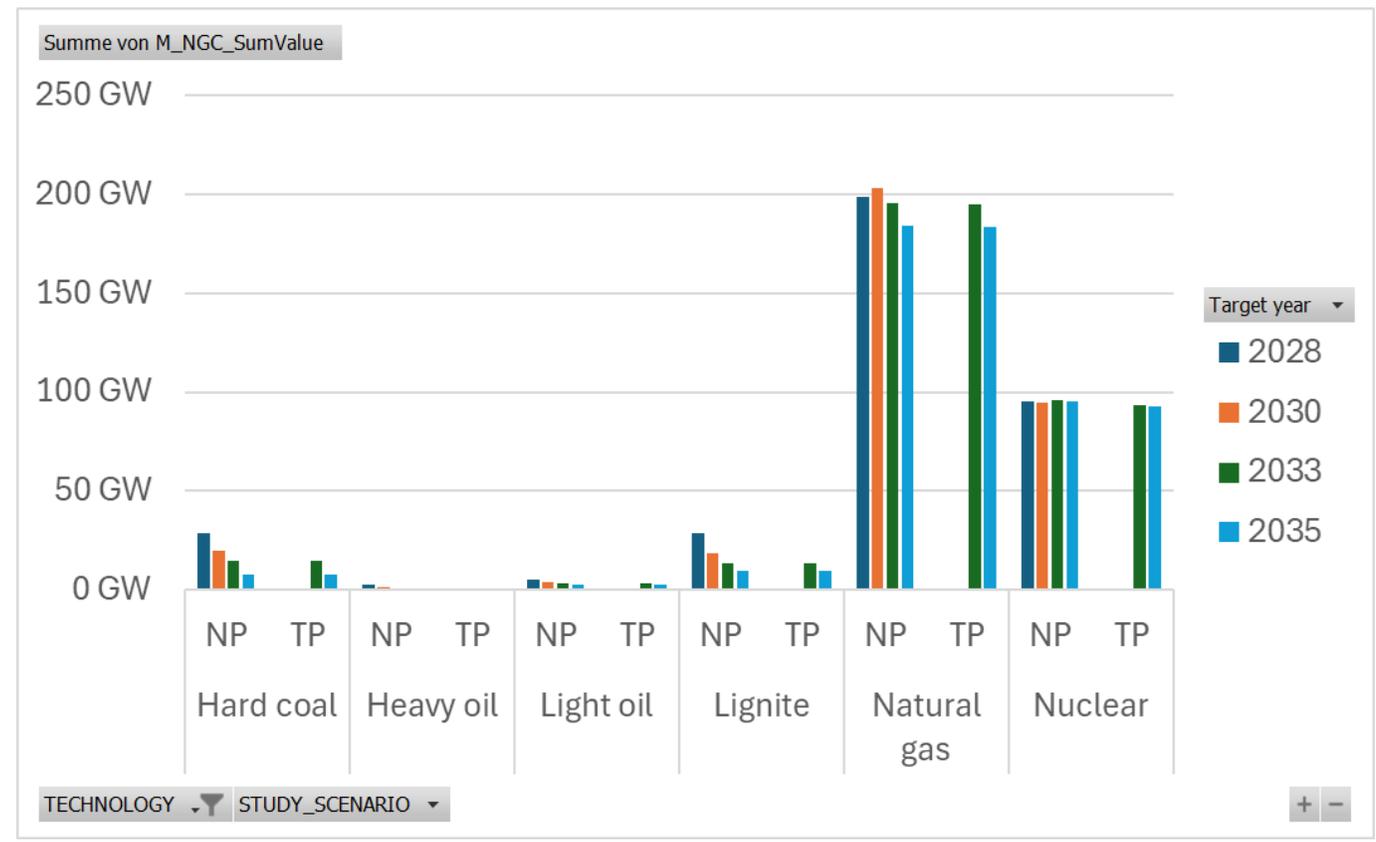
Capacity evolution: focus on Thermal technologies

Decline in thermal capacity driven by Hard Coal, Lignite and Natural Gas.

Thermal capacity evolution between T&P and NP scenario shows only minor differences.

Thermal capacities in Europe are dominated by Nuclear and Natural Gas capacities, in particular in later TYs.

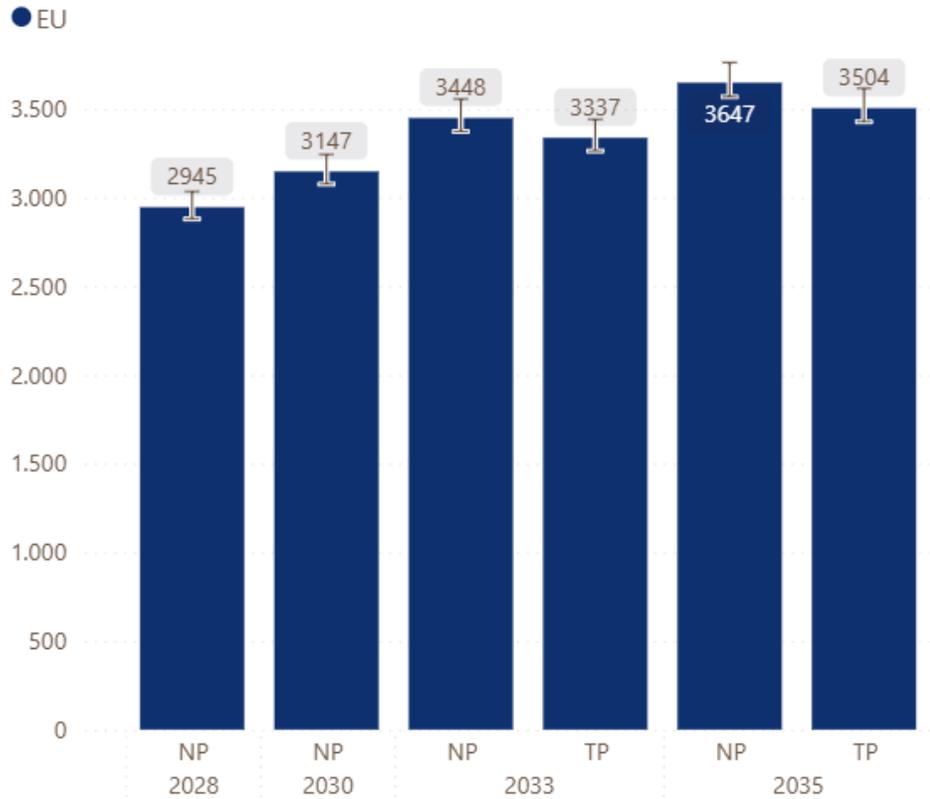
Installed Capacities - EU countries



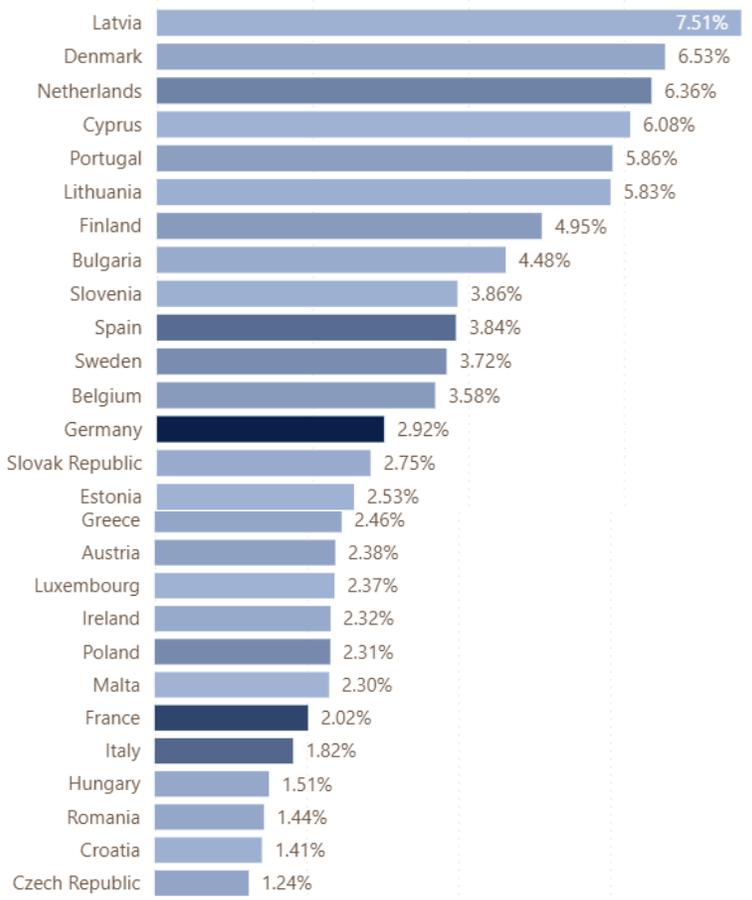


Glance on the data - demand

Annual demand [TWh]



Compound annual growth (NP scenario)



Consumption is expected to grow by 19% in EU between 2028 and 2035.

Consumption growth varies between countries.

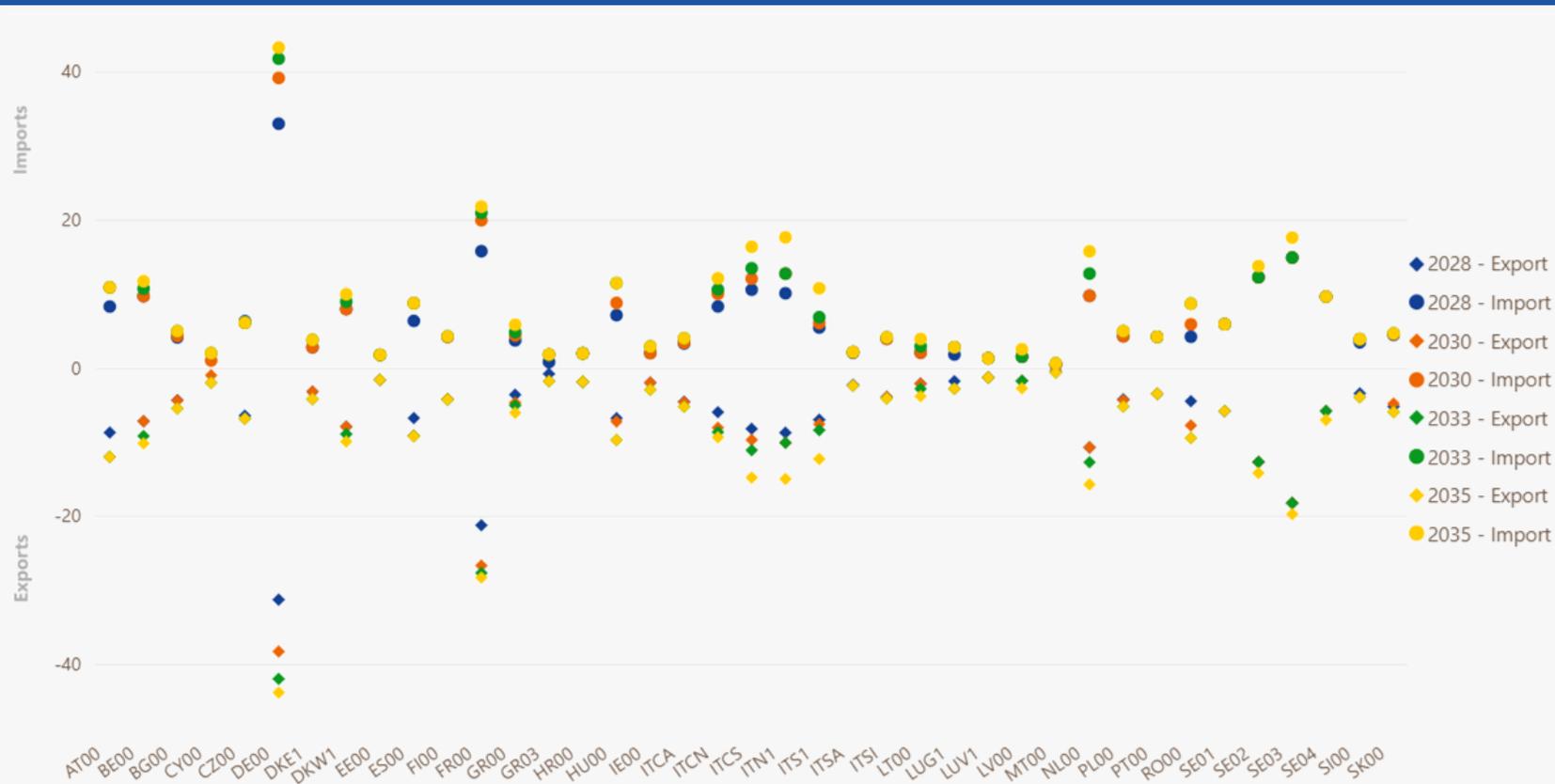
Demand growth in the TP scenario more moderate.

Peak demand for EU countries reaches up to ~590 GW in 2035.



NTC evolution: import-export

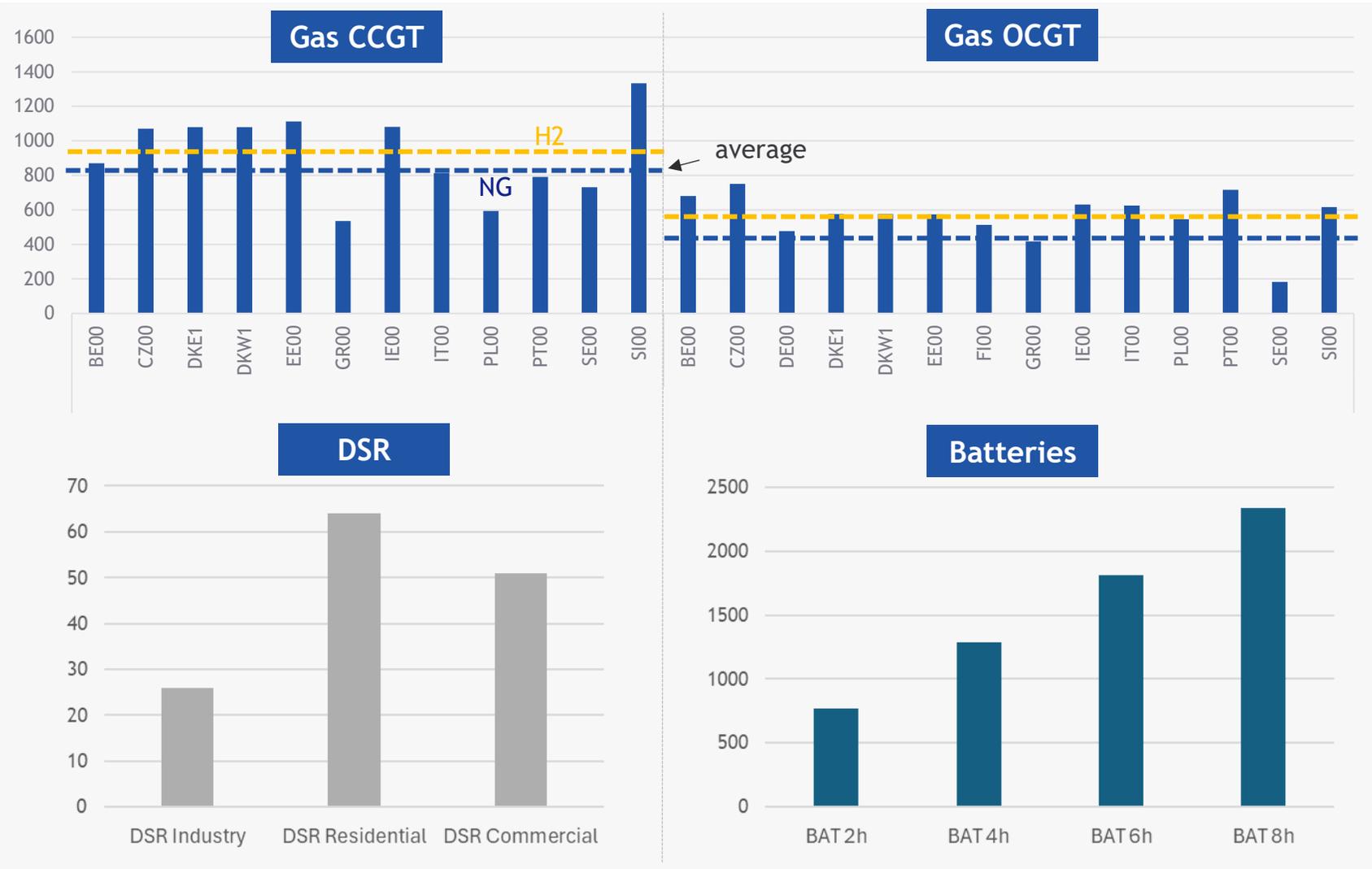
Average Net Transfer Capacities (NTCs) [GW]



- Evolution of NTC capacities in Europe typically increase of target years.
- Disclaimer: In countries with flow-based market coupling (Central Europe and Nordics) NTCs will be replaced by FB domains (preparation for ERAA 2026 ongoing).



Capacity Expansion Cost – CAPEX [€/kW]



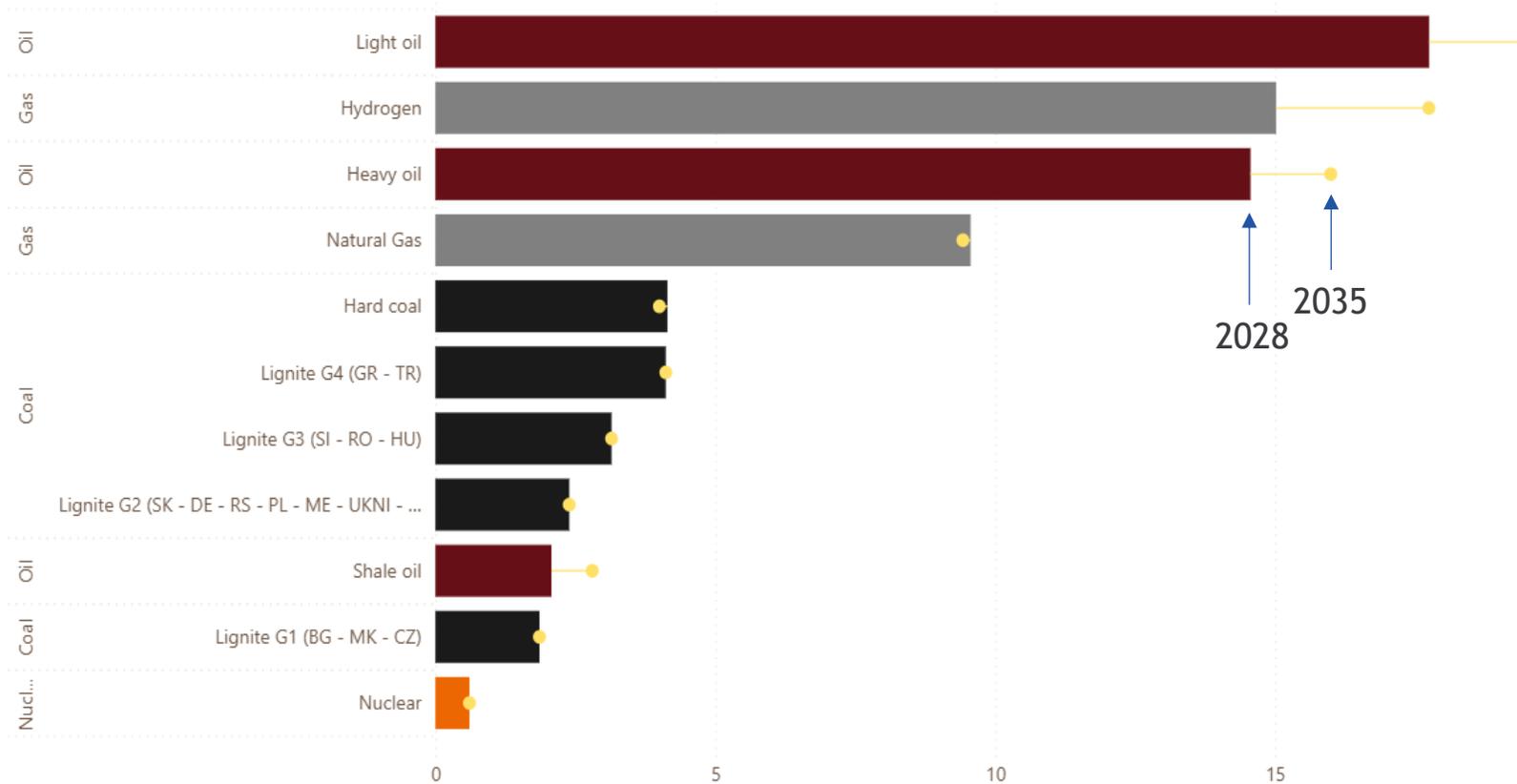
- Harmonized expansion cost are computed for each expansion technology based on average cost from available national CONE studies.
- Batteries: Data stemming from NREL* study with different e/p ratios.
- H2 expansion is assumed with a 10%-15% add-on compared to Gas Blend expansion.

* https://atb.nrel.gov/electricity/2023/utility-scale_battery_storage



Commodity Prices for call for evidence

Evolution of fuel prices [2024 €/GJ] per blend - selected reference year: 2028



Price increase over the study horizon for oil and hydrogen fuels.

Prices for other fuel types do not notably change over the study horizon.

Short Run Marginal Cost of H2 lower than NG from 2033 onwards (OCGT and CCGT).



Data extension note

On 23 February data package was extended to include:



Default investment costs (CAPEX, FOM), which were derived using the same method as for previous ERAAs.

- Gas OCGT, CCGT
- Hydrogen OCGT, CCGT
- Batteries



DSR investment candidate techno-economical parameters.

- Activation costs
- Activation limits

Expansion constraints publication are postponed to post call-for-evidence publication. The available information is currently scrutinized.



Q&A



Lukas Galdikas

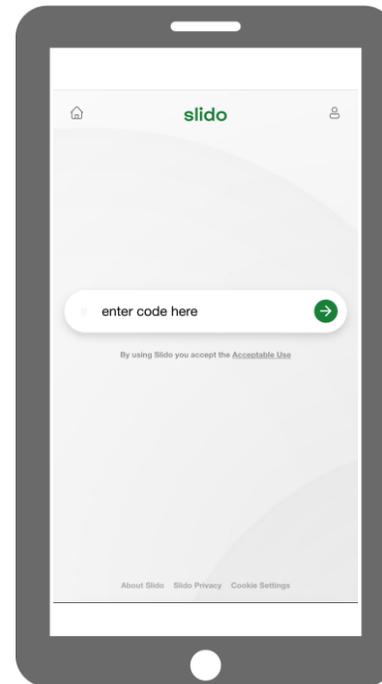
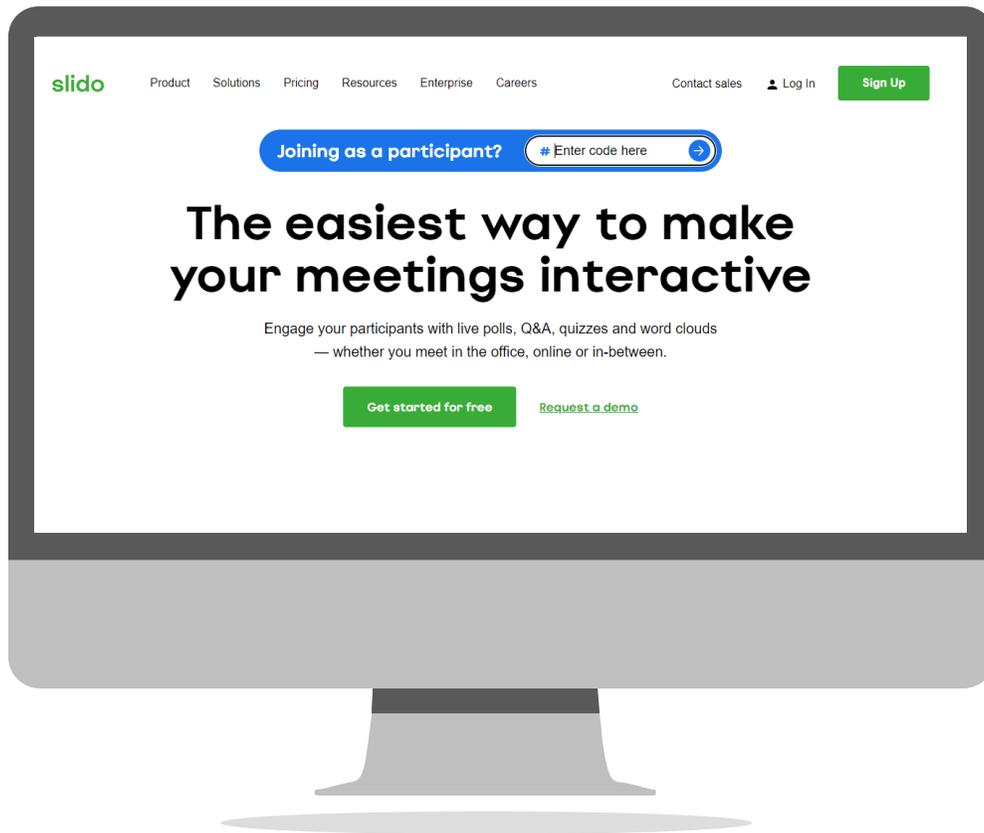
ERAA 2026 Project Manager (ENTSO-E)

Share your questions on Slido

Go to www.sli.do and enter **#2108418**

OR

Scan the QR code with your phone





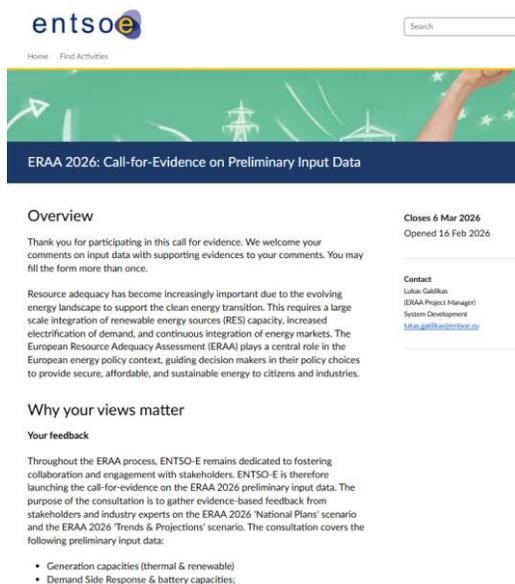
Next steps



Call for Evidence until 6 March 2026 on the ENTSO-E consultation hub

Why your views matter

- ENTSO-E relies on the contributions of stakeholders to develop the ERAA.
- ENTSO-E has continuously engaged with stakeholders during the development of previous ERAA's.
- ENTSO-E now organizes a **Call-for-Evidence** of stakeholders to gather feedback on the ERAA 2026 preliminary input data and further the improvement of the ERAA.



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ERA 2026: Call-for-Evidence on Preliminary Input Data

Overview

Thank you for participating in this call for evidence. We welcome your comments on input data with supporting evidences to your comments. You may fill the form more than once.

Resource adequacy has become increasingly important due to the evolving energy landscape to support the clean energy transition. This requires a large scale integration of renewable energy sources (RES) capacity, increased electrification of demand, and continuous integration of energy markets. The European Resource Adequacy Assessment (ERAA) plays a central role in the European energy policy context, guiding decision makers in their policy choices to provide secure, affordable, and sustainable energy to citizens and industries.

Why your views matter

Your feedback

Throughout the ERAA process, ENTSO-E remains dedicated to fostering collaboration and engagement with stakeholders. ENTSO-E is therefore launching the call-for-evidence on the ERAA 2026 preliminary input data. The purpose of the consultation is to gather evidence-based feedback from stakeholders and industry experts on the ERAA 2026 'National Plans' scenario and the ERAA 2026 'Trends & Projections' scenario. The consultation covers the following preliminary input data:

- Generation capacities (thermal & renewable)
- Demand Side Response & battery capacities;

Related

- [Preliminary ERAA 2026 Common data](#)
- [Preliminary ERAA 2026 NTCs](#)
- [Preliminary ERAA 2026 Dashboard raw data](#)
- [Preliminary ERAA 2026 Demand data](#)
- [Preliminary ERAA 2026 PECD - RES](#)
- [Preliminary ERAA 2026 PECD - weather](#)
- [Preliminary ERAA 2026 Economic and technical investment parameters](#)
- [Preliminary ERAA 2026 Other data](#)
- [Preliminary ERAA 2026 Commodity prices](#)
- [Preliminary ERAA 2026 Explanatory note on data release for call for evidence](#)
- [Preliminary ERAA 2026 Data extension planning note](#)
- [Preliminary ERAA 2026 Data collection guidelines](#)
- [Interactive PowerBI dashboard](#)

Call for Evidence Open

Closing date: 6 March 2026



[Consultation page](#)



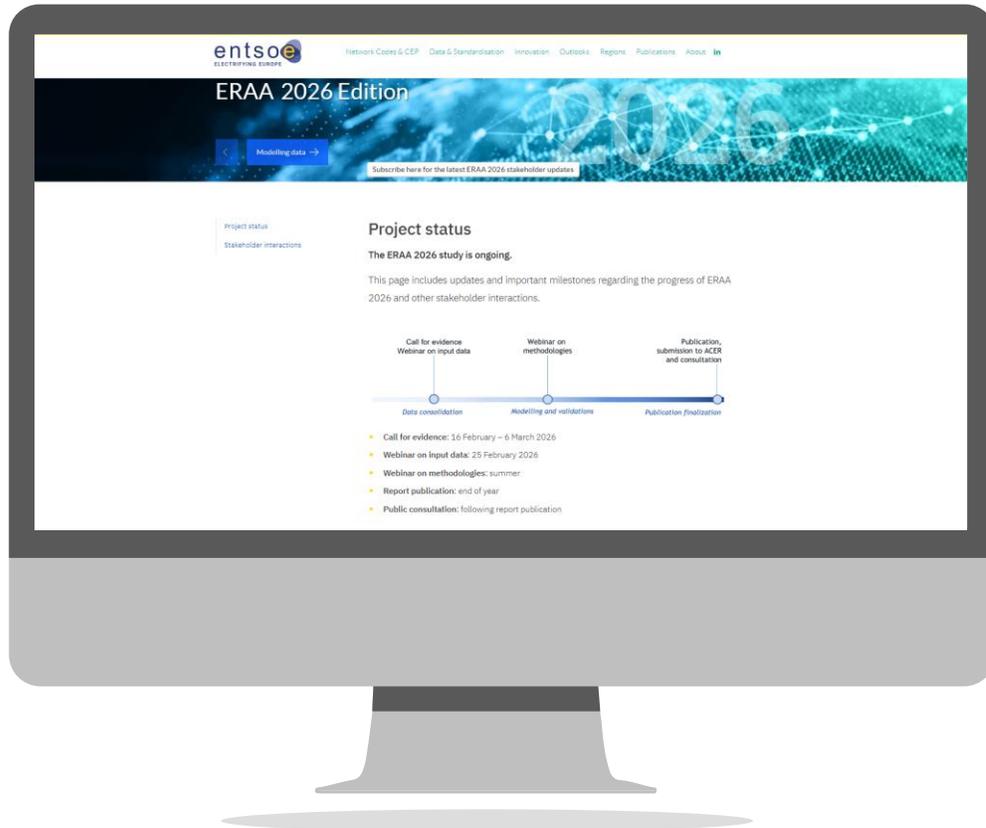
<https://consultations.entsoe.eu/system-development/copy-of-eraa2025-call-for-evidence-preliminary-dat/>

Give us your views

[Online Survey >](#)

Website launch and subscription feature

ERAA 2026 website page available



New: subscribe to ERAA 2026 updates



Subscription feature to stay aware of ERAA study: webinar announcements, release of updated datasets and others.

Better visibility of preliminary modelling datasets in a dedicated space.

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