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ENTSO-E and ENTSOG release their joint Draft Scenarios for TYNDP 2026

(Brussels, 11 June, PR0369-26) **ENTSO-E and ENTSOG released today their draft joint Scenarios, forming the basis for electricity, hydrogen and gas Ten-Year Network Development Plans (TYNDPs) 2026.**

The draft Scenarios highlight a structural transformation of Europe's energy landscape towards climate neutrality by 2050, with overall demand declining due to efficiency gains and electrification. Electricity and hydrogen demand grow strongly, while methane progressively declines; pointing to an energy system with strong shifts in energy end use, including high electrification and an uptake of hydrogen in various sectors.

The TYNDP draft Scenarios assess the interaction between electricity, gas and hydrogen systems, enabling a coherent and integrated analysis of future infrastructure needs. This cycle marks the first full implementation of ACER's TYNDP Scenarios Framework Guidelines from the outset of the process. The framework is built around a central policy-based scenario, National Trends+ (NT+), which reflects the latest national energy and climate policies and is aligned with EU climate targets, including at least a 55% reduction in greenhouse gas emissions by 2030 and climate neutrality by 2050.

The takeaways from the central scenario highlights:

- Continued decline in overall energy demand driven by efficiency gains;
- Strong electrification and rising electricity demand;
- Methane demand decreasing and progressively decarbonised;
- Hydrogen emerging as a key energy carrier, especially for industry and system flexibility.

Sonya Twohig, ENTSO-E Secretary General, commented, *"'These scenarios confirm the central role of electrification and integration across sectors and regions in Europe's path to climate neutrality. By providing a robust and policy-aligned framework, they enable us to identify the infrastructure investments needed to support a secure, efficient and decarbonised energy system."*

Piotr Kuś, ENTSOG General Director, commented, "*The TYNDP 2026 Draft Scenarios show how growing integration between electricity, gas and hydrogen is shaping Europe's path to climate neutrality. Existing gas infrastructure will continue to play an important role in offering flexibility, supporting the development of hydrogen and helping ensure a secure and cost-efficient transition for consumers and industry*."

The development process was supported by extensive stakeholder engagement. As outlined in the ACER TYNDP Scenarios Framework Guidelines, EU energy and climate policies form conditions for the scenarios. ENTSO-E and ENTSOG are therefore expected not to deviate from agreed policies, targets and objectives, including the EU's 2050 climate neutrality objective.

This set of scenarios serves as a strong foundation for the forthcoming electricity and gas TYNDPs, enabling an integrated assessment of Europe's future infrastructure needs. It supports informed and efficient planning decisions, and will contribute to the overall TYNDP 2026 cycle, including the 8th PCI/PMI selection process.

The TYNDP 2026 Draft Scenarios are available on the dedicated website. The package includes the main scenario report, a methodology report, enhanced data and visualisation platform with downloadable input and output datasets, as well as other documents available. These documents will be submitted to ACER for its Opinion and consulted with Member States, followed by review and approval by the European Commission.

Should you require any further information please contact media@entsoe.eu and ENTSOG.Communications@entsog.eu.

Editorial notes

- **The European Network of Transmission System Operators for Gas (ENTSOG)** was founded in line with 2009 playing a key role in facilitating integration of European gas markets, ensuring technical interoperability and providing security of supply by gas infrastructure planning. Within the scope of Regulation (EU) 2024/1789 and other relevant legislation, ENTSOG is contributing to net-zero decarbonisation by 2050 by the integration of renewable and low carbon gases via future-proof gas transmission pipelines, in line with the EU energy and climate goals. More information on ENTSOG can be found on our website – **www.entsog.eu** or contact **info@entsog.eu.**
- **The European Network of Transmission System Operators for Electricity (ENTSO-E)** brings together 40 member TSOs from 36 countries to ensure the secure and coordinated operation of Europe's electricity system – the world's largest interconnected grid. Created with a legal mandate under EU law, ENTSO-E serves as the common voice of European TSOs, delivering technical coordination and strategic contributions to support Europe's energy and climate objectives.