



The EU Energy Summit, held on 4 March 2026, brought together policymakers, industry leaders, private sector, and civil society to strengthen collaboration towards a resilient, clean, and competitive energy future for Europe. Discussions across the programme converged on a clear priority: Europe has set direction through strategy and legislation, but outcomes now depend on faster delivery, stronger infrastructure, and more consistent implementation across the single market.

FROM AMBITION TO DELIVERY: MAKING EXECUTION THE COMPETITIVENESS AGENDA

Europe's energy transition is entering a more demanding phase, where security, affordability, and industrial competitiveness must advance together. High energy prices and continued exposure to external suppliers remain central risks, reinforcing the need to diversify supply, accelerate renewables, and align energy policy with industrial strategy.

Delivery constraints were repeatedly linked to slow permitting, uneven national implementation, and fragmented support approaches. Simplified state aid tools and instruments such as IPCEIs, auctions, and demand-side mechanisms can help scale strategic value chains, but only if authorisations, enforcement, and project selection criteria are credible and consistent. Stable revenue frameworks remain essential to crowd in long-term private capital.

ELECTRIFICATION AND ENERGY INFRASTRUCTURE: BUILDING THE BACKBONE FOR SCALE

Electrification is increasingly positioned as the central pathway to decarbonisation, energy security, and industrial competitiveness, but grid constraints are emerging as the system's defining bottleneck. Power demand is rising across transport, heating, and industry, while parts of Europe's grid infrastructure are ageing and expansion timelines remain slow.

Discussions underlined that electrification progress has stalled at around 23% across the Union, signalling that infrastructure and permitting constraints are now limiting further gains.

Grid modernisation, digitalisation, storage, and demand-side flexibility are key priorities, alongside stronger alignment between transmission and distribution planning. Investment needs are significant, with grid upgrades and expansion projected to require very large capital deployment through 2040, reinforcing the importance of cost-effective approaches and better project sequencing.

At the same time, Europe's infrastructure strategy must remain system-wide. The energy crisis and ongoing geopolitical instability continue to shape the need for resilience, diversified supply, and pragmatic solutions that account for variability in renewables and the role of backup and flexibility options.

CITIES, DIGITALISATION, AND RESOURCE EFFICIENCY: MANAGING NEW DEMAND RESPONSIBLY

Cities were presented as critical delivery hubs for climate neutrality, translating EU objectives into investable, local action. Climate City Contracts and the EU Mission on Climate-Neutral and Smart Cities are helping cities integrate energy efficiency, renewables, electrification, and mobility, while building investment plans that can attract private capital. Scaling progress depends on better coordination across governance levels and stronger capacity to structure bankable projects.

Digital infrastructure is also reshaping the demand outlook. Data centres already represent a meaningful share of electricity use and are expected to grow substantially as AI and digital services scale, while also increasing pressure on water and local grid capacity.



The need for integrated energy, digital, and resource policies was emphasised, including minimum performance standards, grid modernisation, and technologies such as AI-enabled optimisation and more efficient cooling solutions.

Resource efficiency discussions extended beyond digital growth. Water scarcity, industrial resilience, and circularity are increasingly linked, with water reuse and circular approaches framed as a competitiveness lever. Key barriers include fragmented regulation, unclear demand signals, and cost hurdles for smaller firms, pointing to the need for harmonisation, targeted incentives, and clearer market demand for recycled water and secondary materials.

INFRASTRUCTURE RESILIENCE IN A NEW SECURITY ORDER: PROTECTING THE ENERGY SYSTEM

Security and resilience emerged as structural requirements for the energy transition. Growing cyber threats and physical risks to grids, pipelines, cables, and other critical assets are reshaping how infrastructure planning is assessed. Discussions pointed to the need for more consistent implementation of resilience and cybersecurity frameworks, stronger public-private cooperation, and deeper coordination across EU institutions, national governments, and partners such as NATO.

The direction ahead is clear: resilience must be built into infrastructure expansion, not treated as an add-on. Measures highlighted included advanced cybersecurity capabilities, better information sharing, stress testing, and approaches that reduce single points of failure through decentralised generation and storage.

CONCLUSIONS

Europe's energy transition is increasingly defined by delivery. Faster and more uniform permitting, investable revenue frameworks, grid build-out, secure infrastructure, and smarter resource use are mutually reinforcing priorities. Progress will depend on coordinated action that links energy supply, industrial demand, and local implementation, while protecting critical systems in a more volatile security environment.

QUESTIONS OR REMARKS? CONTACT US!

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