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25 years of regulation, What's Next?

2025-2030 strategic guidelines
of the French energy regulator (CRE)



25 YEARS OF REGULATION, WHAT'S NEXT?

2025-2030 STRATEGIC GUIDELINES
OF THE FRENCH ENERGY REGULATOR (CRE)





Foreword

Emmanuelle Wargon,
Chairwoman
of the Commission de régulation de l'énergie

On 24 March 2000, the French energy regulator, *Commission de régulation de l'énergie (CRE)*, was established by the publication of the decree appointing part of its first board, after its remit had been defined in the law of 10 February 2000.

25 years later, CRE has become a key body in the functioning of the energy sector in France, with recognised expertise and strength. Over the years, its missions have increased and it now has four major roles:

- It regulates electricity and gas networks and infrastructures;
- It ensures that the electricity and gas markets work properly;
- It operates the main support mechanisms for renewable energies;
- It enlightens the public debate on major energy challenges.

Its expertise has been developed primarily by those who have shaped it over the years. I would like to thank all the staff members who have made a contribution, the managers, the commissioners, and of course the three Chairs who preceded me, Jean Syrota, Philippe de Ladoucette and Jean-François Carenco.

In 2025 CRE is 25.

25 is a significant age. This is the age of maturity. 25 years is also a good age at which to plan and think about your future, especially at this pivotal moment when climate change and geopolitical tensions are accelerating. The 2022 crisis and the current environment have made energy a key issue in the daily lives of French people, their concerns and even their conversations. CRE must rise to the occasion.

That is why, on this twenty-fifth anniversary, I wanted us to imagine what CRE could look like in five years' time, in 2030, and what objectives it could set for itself. To that end, we brought our teams together. And we also looked beyond our walls, involving our stakeholders in our discussions, in compliance with our core value of dialogue with our ecosystem.

Drawing on the achievements of the last 25 years and the major events that have marked and changed CRE, this document presents the results of these discussions, our strategic guidelines for 2030 focusing on three essential areas: making the energy transition a success, meeting the needs and challenges of consumers and participating in the development of a competitive and sovereign Europe. Our ambition can be broken down into concrete and engaging actions and targets designed to shape CRE of 2030, as we see things today.

Energy is at the center of key major challenges of our time: ecological transition, purchasing power, geopolitics, competitiveness and sovereignty. Responding simultaneously to all these challenges sometimes involves dealing with contradictions. Our role is to find levers that can be applied to overcome these contradictions. We are also responsible for reconciling short-term issues that need to be resolved immediately, and long-term ones that require forward thinking.

In this respect, these strategic guidelines are not an end point but a step in our progress towards 2050, by which time France aims to achieve "net zero", with high-performing energy system and markets.

CRE and all its teams are and will remain fully committed to contributing to this transition.

Main roles and core values of CRE

Since its establishment on 24 March 2000, the Commission de régulation de l'énergie (CRE) has been the French independent administrative authority (AAI) that regulates the energy sector.

In an integrated European system, CRE has four main roles:

- **To regulate electricity and gas networks and infrastructures;**
- **To ensure that the electricity and gas markets work properly;**
- **To operate the main support mechanisms for renewable energies;**
- **To enlighten the public debate on major energy challenges.**

As an independent body and an expert in energy, CRE factors short-, medium- and long-term effects into its decisions for the benefit of consumers and society as a whole.

Three core values underpin the work carried out by CRE:



Openness

to all stakeholders in France, Europe and internationally

All CRE's work is carried out in a spirit of openness and dialogue. Accordingly, it is essential for CRE to consult – beyond its regulatory obligations – and discuss matters with all stakeholders. It takes their opinions into account before making decisions.

It also strives to hold frequent and fruitful dialogue with its European and international counterparts.



Impartiality

in order to ensure the neutrality, fairness and objectivity of all decisions made

CRE carries out its work impartially in order to ensure the neutrality, fairness and objectivity of all decisions made.

To that end, it relies on two bodies that are independent of each other, the Board and the Dispute Resolution and Sanctions Committee (CoRDiS).



Transparency

of work and decision-making procedures

Issues affecting the energy sector concern everyone and are at the heart of many of the key challenges of our time (adaptation to climate change, tackling global warming, finite fossil resources, household purchasing power, competitiveness of companies, energy sovereignty, etc.).

Against this backdrop, CRE aims to contribute to a better understanding of the sector in general, through its work and the transparency and publicity of its decision-making procedures, in order to enable everyone to make informed choices.

The Board

The Board has five members, including its Chairwoman. The members of the Board, appointed due to their legal, economic and technical qualifications, define the main guidelines and adopt decisions and opinions based on the expertise of the departments, under the authority of the Chairwoman and the Chief Executive Officer.

In 2024, the Board adopted 237 resolutions at 80 board meetings.

237
resolutions

80
board meetings

The Dispute Resolution and Sanctions Committee (CoRDîS)

There are four full members and four alternate members of the Dispute Resolution and Sanctions Committee, with an equal number of members of the *Conseil d'Etat* and members of the *Cour de Cassation*. They are responsible for settling disputes over access to public electricity and gas networks and their use between operators and users, and for sanctioning breaches of the French energy code.

In 2024, 42 matters were referred to the CoRDîS and it issued 33 decisions.

42
matters

33
decisions



Budget

The operational funds needed by CRE are proposed each year in the French finance law. The allocated funds are recorded in the general budget of the State. CRE is supervised by the French *Cour des comptes* (Court of Auditors).

In 2024, CRE budget was €24 million and 160 FTE¹ employees (including commissioners).

€24M
and
160 FTE

1 - Full-time equivalent

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25 years of regulation

**Major French and European
milestones**

**1 - Regulation of transmission
and distribution networks:
a key focus of CRE's work**

**2 - The role of CRE
in opening up markets**

**3 - The support provided by CRE
to the development of renewable
energies**

**4 - Leveraging CRE's expertise to
support public authorities**

Major French and European milestones

1996, 1998, 2003 

First Energy Directives

Free choice of supplier for consumers/Freedom of establishment for producers/ Non-discriminatory, transparent and affordable right of access for all network users

2000 

Law no. 2000-108 of 10 February 2000

Establishment of CRE and its initial missions : assessment of public service charges, introduction of renewable energy (RE) tenders, proposal of network usage tariffs, opinion on regulated sales tariffs

2003 

Law no. 2003-8 of 3 January 2003

Extension of CRE's powers to natural gas

2011 

REMIT (Regulation on Wholesale Energy Market Integrity and Transparency) European Regulation No. 1227/2011 of 28 December 2011

Entry into force of the EU REMIT establishing a framework for the supervision of wholesale energy markets and aimed at prohibiting market abuse such as insider dealing and market manipulation



Ordinance no. 2011-504 of 9 May 2011

Establishment by CRE of network usage tariffs

2013 

Brottes Law no. 2013-312 of 15 April 2013

Transposition of REMIT into French law with CRE's authority extended by the application of articles 3, 4 and 5 of the REMIT (relating respectively to the prohibition of insider trading, the obligation to publish inside information and the prohibition of market manipulation) and the authority of the CoRDIS responsible for settling disputes and imposing sanctions, extended to the power to impose sanctions for breaches of REMIT



TEN-E Regulation no. 347/2013 of 17 April 2013 also known as the "Infrastructure Package"

Definition of the concept of Projects of Common Interest (PCIs) for electricity and gas networks

2006

Law no. 2006-1537 of 7 December 2006

Transposition of the 2003 Energy Directive, establishment of the Dispute Resolution and Sanctions Committee (CoRDIS) and CRE given the role of supervising wholesale markets

2009

Third Energy Package

Setting tariffs for the use of networks by regulators, establishment of the European Agency for the Cooperation of Energy Regulators (ACER), and development of European network codes

2010

NOME Law no. 2010-1488 of 7 December 2010

Establishment of an access and a tariff for regulated access to incumbent nuclear electricity (ARENH), elimination of regulated electricity sales prices (TRVEs) for non-residential customers with a subscribed power of more than 36 kVA on 31 December 2015, and strengthening the supervisory missions of CRE

2014

REMIT Implementing Regulation no. 1348/2014 of 17 December 2014

REMIT is fully and operationally implemented



Consumption law no. 2014-344 of 17 March 2014

Removal of regulated natural gas tariffs for non-residential customers consuming more than 30 MWh per year by 31 December 2015

2016

Ordinance no. 2016-461 of 14 April 2016

Clarification of CRE's authority in the areas of information collection, penalties and cooperation and in particular the transposition of REMIT regulation into French law with CRE's powers extended by the application of Articles 8, 9 and 15 of REMIT (relating respectively to data collection, the registration of market participants and the obligations of persons professionally arranging transactions) and the application of Articles 3, 4 and 5 of REMIT to capacity markets

Major French and European milestones

2018

Law no. 2017-1839 of 30 December 2017

Reform of the regulations governing gas storage in France with a new role given to CRE involving setting prices and approving operators' investments. It sought to guarantee the security of gas supplies by introducing a regulatory mechanism to encourage operators to maintain sufficient storage capacity

2019

Fourth Energy package

Primacy of energy efficiency/
Global leadership in renewable energies/Consumers at the heart of the energy system

Law no. 2019-1147 of 8 November 2019

Implementation of the regulatory sandbox, a regulatory experimentation system that provides a legal framework tailored to projects that test innovations that may ultimately require changes to be made to the applicable legal framework

2022

Finance Law for 2022 (no. 2021-1900) of 30 December 2021

Implementation of tariff shield mechanisms and price shock absorber

2024

Electricity market reform, Hydrogen and Decarbonised Gas Market Package and REMIT Reform

These different texts seek to better protect EU citizens and businesses against the volatility of fossil fuel prices and against abuse on the energy markets.

They also seek to contribute to the introduction of renewable and low-carbon gases, in particular hydrogen, in the energy system, with a view to meeting the EU's decarbonisation targets

Since being established in 2000, CRE has become a key player in the French energy system. Its work is carried out in a sector undergoing profound transformation, marked by rapid technological advances, steady regulatory changes, major economic crises and the long-term goal of climate neutrality. At the heart of this complex system, CRE must act for the benefit of consumers and ensure an optimal balance between economic efficiency, security of supply and energy transition.

In this context, it has taken decisive action to strengthen the independence of network operators, ensure that markets are effectively open to competition, provide secure support mechanisms for renewable energies and advise public authorities on the development of energy policies.

Furthermore, in an increasingly structured European energy environment, CRE actively contributed to the CEER, the Council of European Energy Regulators, and then to the ACER, the European Union Agency for the Cooperation of Energy Regulators, when it became operational in 2011. It has accordingly actively contributed to shaping European rules such as the CAM network code for gas (2013) and the wide-scale roll-out of market coupling for electricity (2015).

1 Regulation of transmission and distribution networks: a key focus of CRE's work

The regulation of networks is one of CRE's original roles. Since being established in 2000, CRE has endeavoured to effectively regulate electricity and gas networks, with three objectives: to ensure non-discriminatory access to essential infrastructure, to make investments in line with long-term needs and to guarantee the performance of network operators in terms of cost and quality of service.

Using infrastructures that have historically been integrated into the monopolies enjoyed by EDF and Gaz de France, CRE has established a regulatory framework ensuring the transparency and independence of network operators and their economic efficiency.

Its role has changed over time: initially in charge of proposing network tariffs, it has been responsible for setting them since 2011.

CRE also approves investments by operators of electricity and gas transmission networks and investments in gas storage infrastructure.

Setting network tariffs: a key tool in investment and cost control

One of the CRE's first major roles was the development of tariffs for the use of public electricity networks (TURPE) and tariffs for the use of gas networks. These tariffs enable infrastructure to be financed while encouraging network operators to control their costs and ensuring quality of service.

In the gas sector, CRE has played a key role in gradually harmonising transmission rates between the different market regions. In 2018, it led the merger of the two main French gas regions (PEG Nord and TRS) to create a single market, the Gas Exchange Point (PEG), improving the liquidity and competitiveness of the gas market in France.

In 2018, CRE began regulating the underground storage of natural gas.

In practical terms

The incentive regulation introduced for Enedis and RTE has led to measurable improvements: the average duration of power outages has been cut by around 30% in the space of twenty years, from more than 100 minutes in 2000 to around 70 minutes today.

Independence and modernisation of network operators

The separation of transmission and distribution network activities from production and marketing activities was another major challenge for CRE. In this context, it ensured that network operators were independent of the historic companies, in order to ensure fair access to new market entrants, both upstream, in production and downstream, in the supply

of electricity. In the early years, CRE clarified the obligations incumbent on grid operators in terms of accounting and functional separation and defined strict rules on the use of consumers' data to avoid discrimination between energy suppliers. The network operators were then established as separate subsidiaries.

In practical terms

CRE oversaw the separation of RTE, GRTgaz (now NaTran) and Teréga from their parent companies, with strict obligations in terms of governance and transparency, as well as the effective operational and decision-making independence of Enedis, GRDF and the local distribution companies (ELD) vis-à-vis their parent companies.

CRE ensures that the rules on the use of consumers' data are properly applied in order to avoid any discrimination between energy suppliers.

CRE has also encouraged the modernisation of infrastructure, both through its regular renewal and the introduction of smart meters and the development of smart grids. Infrastructure is an essential lever in making the electricity system more flexible, by facilitating demand-side management, the integration of decentralised production sources and the optimisation of energy flows. In addition to the publication in 2010 of a book on the development of electricity grids, CRE established the first French institutional think tank dedicated to Electricity smart grids.

In practical terms

CRE supervised the deployment of 50 million Linky and Gazpar smart meters. They now make France one of the European leaders in terms of coverage rate.

An increase in interconnections

CRE has been supporting the development of electrical interconnections with neighbouring countries, enabling France to increase its exchange capacity through seven new interconnections (two of which are under construction) with the United Kingdom, Ireland, Belgium, Germany, Switzerland, Italy and Spain for more than 10 years, with power of approximately 7 GW.

Between 2009 and 2016, CRE supported the development of gas interconnections with neighbouring countries: Belgium, Germany, Spain and Italy via Switzerland. They were particularly useful during the gas crisis of 2022-2023, by enabling France to become an important gas entry point in Europe with gas being exported onwards to Italy, Belgium and Germany.

Adaptation of balancing rules as well as the development of agile regulatory frameworks to allow new solutions to be tested

CRE has gradually adapted the balancing rules to changes in the electrical system, opening up to competitors the constitution by RTE of the reserves required to balance the electrical system and allowing all flexibilities to participate in these markets.

More generally, CRE encourages an agile regulatory framework in order to cope with the transformations in the sector, in particular through the implementation of the "regulatory sandbox".

In practical terms

Over the last 25 years, CRE has successfully introduced a robust regulatory framework for networks, guaranteeing security of supply, equal access and controlled costs. Its actions have resulted in the modernisation of infrastructure, the development of interconnections, the integration of new market operators and the preparation of the energy system for the challenges of the energy transition.

The role of CRE in opening up markets

CRE has played a central role in organising the opening up of the electricity and gas markets to competition, by establishing consultation bodies in 2004 to define and develop the rules governing the functioning of the market, thereby ensuring effective competition for the benefit of consumers.

Its actions have resulted in the implementation of non-discriminatory rules on network access and simple and consumer-friendly procedures, such as changing suppliers immediately and for no cost in 2007. Under the NOME law, CRE has, since 8 December 2015, been responsible for proposing regulated electricity sales tariffs (TRVEs) while operationally managing the ARENH system.

Regulated tariffs whose scope has reduced over time

As part of the process of opening up the markets to competition, the types of consumers who are able to benefit from regulated tariffs has changed significantly:

In gas, CRE supported the gradual abolition of regulated gas sales tariffs, starting with the largest consumers:

- In 2014, regulated tariffs for business consumers consuming more than 30 MWh/year were abolished;
 - In 2019, all regulated tariffs for businesses were abolished;
 - In 2023, the abolition of regulated tariffs for retail consumers marked the completion of this transition. CRE has since published a benchmark price to help consumers in choosing market offers.
- In electricity**, the change in the eligibility criteria involved abolishing regulated tariffs for business consumers above a certain size

and ensuring equal treatment within the same category of consumers:

- In 2016, regulated tariffs for the sale to business consumers with a subscribed power of more than 36 kVA were abolished;
- Since 2021, companies with more than 10 employees or whose turnover, revenue and annual balance sheet total exceed €2 million have not been eligible for regulated tariffs;
- In 2025, the 36 kVA cap on the eligibility of residential sites, micro-enterprises and local authorities employing less than 10 persons and whose turnover didn't exceed €2 million, was abolished. CRE has proposed regulated tariffs for all consumers of this kind.

These developments have largely contributed to creating a competitive market in France.

In addition, the mission granted to CRE to set TRVEs led to the development of the "stacking" methodology for calculating the TRVEs aimed at removing barriers to entry for new market entrants by factoring in a supplier's procurement costs on the market.

The pricing methodology introduced by CRE by its resolution of 13 July 2016, which was confirmed by the *Conseil d'Etat*, has guaranteed increased competition, as shown by the rise in the number of suppliers since the liberalisation of the downstream market and the number of residential consumers who have chosen a market offer.

In practical terms

Competition in the downstream sector is now a reality and a benefit to consumers, who have access to a wide choice of suppliers and offers tailored to their needs, in a transparent and supervised market.

In gas, all consumers have access to a market offer. 46% of residential consumers have chosen alternative suppliers.

In electricity, 14.6 million residential consumers, i.e. 42%, have taken out a market offer. More than 50 alternative providers offer electricity supply contracts, chosen by around 30% of residential consumers.

Consumer protection and market monitoring

While the opening-up to competition has resulted in a more diversified offering and increased competition in terms of prices and quality of service, it has also required mechanisms to be put in place to protect consumers and monitor that the market is functioning properly. Accordingly, during the crisis following Russia's invasion of Ukraine and the concomitant fall in nuclear power generation in France, CRE faced unforeseen challenges that highlighted the need to constantly adapt regulation to current realities. Through broad support mechanisms

implemented in such a way as to avoid any windfall effect, it has contributed to mitigating the impact of price increases on consumers (households and businesses), in particular through the implementation of tariff shields approved by Parliament and the Government.

On the upstream market, CRE implements the European regulation on wholesale energy market integrity and transparency (REMIT), which targets to ensure the integrity of the wholesale markets by detecting and sanctioning market abuse. The aim of this regulation is to improve the transparency of exchanges and ensure healthy competition between players. In 2018, the Dispute Resolution and Sanctions Committee (CoRDIS) issued its first sanction under REMIT. Since 2014, CRE has opened a total of 22 investigations, which have resulted in eight sanction decisions being issued by the CoRDIS in relation to seven cases totalling €19.2 million.

In practical terms

CRE has introduced transparency obligations aimed at avoiding misleading commercial practices and protecting consumers. Its work is structured around three main areas:

- Introducing guidelines on the practices of electricity and natural gas suppliers, signed by almost all suppliers, operational for residential consumers since 30 September 2024;
- Checking the consistency of offers, with data reported since December 2024;
- Implementing prudential obligations for suppliers, for which consultations were launched in July 2024.

3 The support provided by CRE to the development of renewable energies

CRE has played a key role in the development of renewable energy (RE) in France for more than two decades. It introduces measures to support the production of electricity and renewable gas, ensuring a stable and predictable economic framework for investors, while ensuring that costs for public finances remain under control.

Calls for tender, a lever in the development of renewable energy capacity

CRE's main role in supporting the energy transition is issuing opinions on draft specifications and reviewing calls for tender for renewable electricity production facilities. On behalf of the State, CRE selects the most competitive projects in terms of costs and economic and environmental efficiency, while respecting the objectives set by the State.

In practical terms

Since 2011, CRE has carried out more than a hundred calls for tender, resulting in the award of around 30 GW of new photovoltaic and onshore wind generation capacity, strengthening the contribution of these sectors to the development of the French energy mix.

Offshore wind power is also growing in capacity, with a total of 8 calls for tenders launched to date, 5.4 GW awarded and 3 operational and connected wind farms with a total power of 1.5 GW.

Adjustment of support systems to ensure their effectiveness

CRE ensures that the support mechanisms, such as bonus remuneration contracts and feed-in tariffs, are aligned with market developments and technology costs. It regularly assesses the levels of support, in particular by carrying out sector audits to avoid any overcompensation.

As such, it helped to gradually reduce the guaranteed purchase prices for photovoltaic and wind power, resulting in a fall in the cost of public support.

In practical terms

Bonus remuneration contracts dominate, replacing "feed-in tariff" contracts, which are now limited to small producers.

Guaranteed feed-in tariffs have fallen by more than 70% in ten years, which has significantly reduced the cost of purchase agreements for new solar installations.

Integrating renewables into the electricity system and optimising their management

In addition to financial support, CRE plays a key role in the integration of renewable energies into the electricity system. It encourages the development of innovative solutions to improve intermittency management and ensure the stability of the electricity system. One of the major initiatives is the encouragement given to the development of all flexibilities, whether for renewable production methods or for load-shedding and storage.

CRE validates the network connection rules for renewable energy producers and new uses, in particular charging infrastructure. It has also facilitated the development of smart demand management devices, enabling consumers to play an active role in balancing the network.

In practical terms

France has one of the most developed load-shedding capacities in Europe, with capacity of 3.7 GW.

At the end of 2024, 1.1 GW of battery storage capacity was available, and an additional 1.5 GW is expected to be available by the end of 2026, with no public support.



4 Leveraging CRE's expertise to support public authorities

In addition to carrying out the roles given to it by law, CRE also provides support and advice to the State in defining and implementing energy policies. Its technical and economic expertise informs public decisions, always ensuring a balance between competitiveness, energy transition and consumer protection, for the common good.

Management of regulatory systems on behalf of the State

In addition to its roles of reviewing RE calls for tender, CRE operates mechanisms that are critical to the functioning of the energy sector.

CRE is responsible for assessing the public energy service charges (*Charges de service public de l'énergie* - CSPE) borne by operators. In particular, CRE calculates the cost of supporting renewable electricity and gas, the cost of tariff equalisation in non-interconnected areas (NIAs) and the cost of social measures. During the crisis, CRE also implemented exceptional consumer protection measures, price shields and price shock absorber. CRE supervises the procedures for offsetting management fees and carries out checks on declared expenses. Lastly, it oversees the long-term valuation of volumes sustained under power purchase obligation agreements.

In practical terms

For 2025, provisional CSPes represent an amount of around €8.9 billion, including nearly €6 billion in support for renewable energies in mainland France.

Since 2011, CRE has also been responsible (and will be responsible until December 2025) for the operational management of regulated access to incumbent nuclear electricity (ARENH), including the management of gates and ex post checks on aligning the volumes requested by suppliers with their consumption portfolio.

Since the 2023 delivery year, CRE has analysed the appropriateness of requests made within the framework of the ARENH gates and has the ability to rectify individual requests made by suppliers if it detects a clear risk of overestimation. During the year, CRE can now request that ARENH volumes cease being delivered if it detects a significant difference between suppliers' initial requests and actual consumption.

In practical terms

For 15 years, CRE has overseen and operationally managed the ARENH system, which allows consumers to benefit from a share of EDF's incumbent nuclear production at a fixed price, regardless of who their supplier is. It also ensured on an ex post basis that the distribution rules between suppliers were correctly complied with, by submitting matters to the CoRDIS where necessary. In this respect, one sanction has been imposed and two cases are ongoing.

Implementation of consumer protection measures

In connection with the energy price crisis that began at the end of 2021, CRE ensured that the price shields and price shock absorber introduced by the State, aimed at limiting the impact of the increase in energy prices on households and companies, were effectively implemented.

In practical terms

Against the backdrop of this crisis, CRE has redistributed more than €26.3 billion on behalf of the State, resulting in a reduction in end consumers' bills, with strict checks to avoid any windfall effect and ensure that the State aid is fully redistributed to consumers.

The role of advising public authorities

In addition to its operational role, CRE plays a role in guiding French energy policies. It regularly issues opinions and recommendations on regulatory and pricing developments.

Its technical and financial expertise, particularly in terms of assessing production costs, is often sought by the State, both in relation to Overseas France and the nuclear sector, among other areas.

CRE actively participates in European work on integrating the energy markets and the functioning of price formation mechanisms. It contributes to the definition of regulatory frameworks applicable at European Union level, thereby ensuring consistency between domestic policy and the strengthening of the internal energy market.

In practical terms

In 2024, CRE published more than 20 official reports aimed at informing the energy choices of the Government and Parliament.



A low-angle, upward-looking photograph of an industrial facility. The image shows a complex network of metal structural beams, pipes, and valves. A prominent red pipe runs vertically on the left side, while other pipes in silver, yellow, and blue are visible. The background is a clear, bright blue sky. A semi-transparent dark blue rectangular box is overlaid on the right side of the image, containing white text.

CRE 2030:

**New strategic
guidelines
for the next
five years**

CRE 2030

New strategic guidelines for the next five years

25 years after the creation of CRE, competition is now effective in the French market, networks' regulation is operational, and renewable energy has expanded significantly.

In recent years, the energy sector has experienced profound upheavals and is expected to undergo rapid transformation. This transformation will continue in the future, particularly around the electrification of uses (mobility, buildings, industry), which will significantly increase electricity consumption and will therefore require an increase in electricity production capacity (nuclear and renewable) and greater flexibility in both production and demand. This will offset a portion of current consumption of fossil fuels, particularly gas, for which transmission and distribution must continue to be ensured and financed under optimal security conditions.

Drawing on its experience and expertise acquired over the past 25 years in an integrated European system, CRE has decided to look ahead five years, to 2030, and to imagine what its role could be at that time and in this context.

It has thus set concrete objectives around three major pillars of its action: successfully achieving the energy transition, meeting the needs and challenges of consumers, and contributing to the construction of a competitive and sovereign Europe. These three pillars are broken down into eight guidelines and 22 actions that will punctuate the next five years.

These targets are complemented by three key levers that will enable CRE's work to shine in France and internationally.

Making the energy transition a success

- >> Guideline 1
Ensuring economic efficiency in the transformation of the energy mix
- >> Guideline 2
Leading the transformation of the electricity and gas networks
- >> Guideline 3
Mobilising all stakeholders to develop flexibilities

Meeting the needs and challenges of consumers

- >> Guideline 4
Ensuring that the wholesale markets work in a manner that reflects fair price formation
- >> Guideline 5
Securing a competitive and attractive energy framework to benefit the French economy
- >> Guideline 6
Ensuring that the retail market functions properly and is clear to and understandable by all, so that consumers are able to choose a contract that suits them

Participating in the development of a competitive and sovereign Europe

- >> Guideline 7
Influencing in an integrated European energy market
- >> Guideline 8
Transforming the energy transition into an opportunity for domestic and European industrial sectors

Levers to promote CRE's actions in France and internationally

- >> Engaging in public debate
- >> Sharing our economic and regulatory expertise and our values at the international level
- >> Attracting talent and devising a programme to develop and maintain expertise underpinned by cutting-edge digital tools



MAKING THE ENERGY TRANSITION A SUCCESS

At the 1992 Rio Earth Summit, the international community recognised the need to take collective action to protect people and the environment by limiting greenhouse gas emissions. In 2015, through the signing of the Paris Agreement, States agreed on the need for a major collective effort to be made to limit global warming to below +2°C above pre-industrial levels and to cope with its effects.

The European Union (EU) and all its member states have signed and ratified the Paris Agreement. To achieve this goal, the EU has launched the European Green Deal. This strategy is reflected in the “Competitiveness Compass for the European Union” launched by the European Commission in 2025, which includes a joint decarbonisation and competitiveness roadmap. This is in line with the target of making the European Union climate neutral by 2050.

France’s energy transition ambitions, set out in the draft of the third Multi-Annual Energy Programme for the period 2025-2035 (PPE 3), form part of this trajectory. This programme provides for the development of the energy mix by 2035, including an increase in renewable energy (RE) production methods and the optimised use of the existing nuclear fleet, pending the construction and commissioning of the future nuclear facilities planned from 2038.

CRE’s actions form part of this framework and it has a major role to play in ensuring that the latter is achieved, for the benefit of consumers and, more generally, all the society.



GUIDELINE 1

ENSURING ECONOMIC EFFICIENCY IN THE TRANSFORMATION OF THE ENERGY MIX

Efficient development of the energy mix requires an adapted and scalable support framework for each sector. In this context, CRE has, relying on its role as the operator of support systems and its ability to collect data concerning costs from stakeholders, significant capacity to analyse the development of the various renewable sectors. As such, it plays a monitoring and advisory role with a view to ensuring the consistency, clarity and efficiency of the support mechanisms implemented throughout France.

CRE is also helping to accelerate the deployment of renewable energies while ensuring that the associated public spending programmes are optimised. To that end, it operates – and will continue to operate over the period – the support mechanisms efficiently and in line with the objective to develop the energy mix.

Action #1

**Increase the clarity and efficiency
of support mechanisms**

Action #2

**Efficiently operate support mechanisms
for low-carbon production methods**

Action #3

**Take account of the specific nature of small isolated
systems in non-interconnected areas – NIAs**

Action #1

Increase the clarity and efficiency of support mechanisms

CRE will contribute to the clarity, simplicity, predictability and consistency of the proposed mechanisms with a view to encouraging the development of projects in a competitive environment. Based on the information collected from businesses and its experience in reviewing the various calls for tender, CRE will be able to notify the public authorities of the efficiency of the support mechanisms, i.e. their ability to achieve the objectives set out in the PPE at the best cost to the public purse. It will also seek to ensure that the support mechanisms send the appropriate signals to the renewable energy producers, who must contribute to the balancing and flexibility of the system by adjusting their production where necessary.

Over the coming period, and given the significant level of development sought for renewable production methods, it will be crucial that all available sources of development be mobilised, including those that can be developed without public support and therefore without any financial commitment from the State budget.

2030: Turning vision into reality

CRE regularly publishes details of the economic performance of each renewable energy sector, including connection costs, in order to provide the public with uniform cost bases and details of real projects, as well as trends.

Tenders are sized as accurately as possible to ensure that the pace of development of renewable energy remains consistent with the objectives of the PPE and a good level of competition during each period, guaranteeing cost-effective support from public finances.

The support systems, contractual mechanisms and the coordination between renewable production, aggregation and supply activity now mean that renewable energy developed without public support can be significantly expanded, in particular through PPA-type contracts.

Action #2

Efficiently operate support mechanisms for low-carbon production methods

Drawing on its expertise and its regular discussions with stakeholders, CRE will continue to apply the support mechanisms, seeking, despite the increase in the volumes called for in the various calls for tender, to further optimise the time it takes to review competitive procedures. To that end, it will seek to develop simplification measures, as appropriate.

In addition, as part of its role of annually assessing public service charges associated with supporting renewable energies, CRE will ensure that the contractual support conditions are properly applied through in-depth checks on the charges declared by a growing number of operators (EDF OA, local distribution companies (*Entreprises locales de distribution - ELDs*), biomethane buyers, subrogated buyers, etc.). In particular, it will ensure that the activity of managing contracts benefiting from public support is carried out at the right cost and that the procedures used to value volumes benefiting from support on the wholesale market offer the best level of stability and predictability for the public purse.

2030: Turning vision into reality

CRE carries out all calls for tender within a time frame that meets the needs of the sectors: 5 weeks for traditional tenders and 12 weeks for large offshore tenders.

CRE has put in place a regulatory framework to ensure that the operators in charge of managing energies that receive subsidies are efficient in terms of management costs, and that the administration of the large volume of contracts and the valuation of the energy produced on the wholesale markets is operationally efficient in order to protect the State against the risk of valuation issues with significant budgetary impacts.

Action #3

Take account of the specific nature of small isolated systems in non-interconnected areas – NIAs

CRE will continue to support the NIAs in the development of renewable energies, to enable the energy mix to be decarbonised as quickly as possible and to ensure greater energy independence for these regions.

It will help to define the optimal energy mix in the medium term for each of the regions, taking into account the specific characteristics of each region (the potential of geothermal development, offshore wind, etc..), beyond the transition phase, which is based in part on the conversion of historical thermal resources to biofuels.

It will ensure that production methods are developed in parallel with means for storing energy and controlling energy demand required in order to achieve these target energy mixes, at the best cost for public service charges, using competitive procedures to the extent possible.

It will develop and adapt the regions' electricity networks, at the best possible cost in order to integrate new production methods (distribution of investments and intermittency management).

2030: Turning vision into reality

Each of the non-interconnected areas has a long-term vision that sets a target for a decarbonised energy mix as part of establishing better energy autonomy for the region. This vision is supplemented by a 10-year PPE.

The network development plan is adapted and will eventually cover all the target production resources.

The use of mature renewable energies, including photovoltaic and geothermal energy, is accelerating, and is contributing to the reduction of the burden associated with tariff equalisation in the NIAs, as the fuels used in thermal power plants, in particular the biofuels needed in a transition phase, are particularly costly. Steps taken to control demand also help to control equalisation costs.



GUIDELINE 2

LEADING THE TRANSFORMATION OF THE ELECTRICITY AND GAS NETWORKS

CRE sets the network usage tariffs for electricity (TURPE) and gas (ATRT/ATRD/ATS/ATTM) and enable their development in a manner that is harmonised and consistent with needs. It provides investors with a stable and predictable medium- and long-term regulatory framework and provides infrastructure managers with the means to finance the necessary changes.

By 2030, the transformation of the electricity and gas networks represents a fundamental lever in supporting the energy transition and meeting the growing electrification needs of the economy. This transformation is aimed at modernising and strengthening infrastructure while controlling costs for consumers.

Action #4

**Support the electrification of the economy
by developing networks**

Action #5

**Modernise electricity networks
at a controlled cost for consumers**

Action #6

**Define the long-term economic trajectory
of natural gas infrastructure**

Action #7

**Put in place a regulatory framework focused on investment
in the development of infrastructures for new gases
(hydrogen and carbon dioxide)**

Action #4

Support the electrification of the economy by developing networks

To support the electrification of the economy, it is essential that future infrastructure needs are anticipated while technological changes and new consumer expectations are taken into account. The networks now appear on the critical path of a number of decarbonisation projects in relation to both production and consumption.

CRE will therefore work to:

- Implement simplified systems to speed up the connection of industrial sites involved in decarbonisation;
- Integrate new production capacities into the networks, in particular offshore solar and wind, and also nuclear over the longer term;
- Develop the charging infrastructure for electric vehicles by promoting the installation of electric charging terminals (on roads, at apartment blocks, etc.).

In order to meet these challenges, CRE will be able to apply acceleration policies based on three pillars: forward planning of certain investments in highly dynamic areas, pooling of works between different projects, prioritisation of investments.

2030: Turning vision into reality

The time it takes to connect to a distribution network has fallen sharply and returned to the historic lows, first seen in 2019.

It is possible to connect to the very high voltage transmission network in less than 3-4 years.

Action #5

Modernise electricity networks at a controlled cost for consumers

In order to ensure access to affordable energy, the modernisation of networks must be accompanied by the streamlining of investment and maintenance costs. To that end, CRE will have to combine the enhanced control of investments with the implementation of a regulatory framework appropriate to financing the strong growth of these investments.

The aim is to limit costs, by prioritising the establishment of overhead networks where technically and socially acceptable, by standardising and pooling equipment, by prioritising the use of flexibility as an alternative to investment, or by implementing an incentive regulatory framework on investment costs through an approach based on performance in relation to unit costs.

A stable and predictable regulatory framework will also need to be developed to secure long-term investment in the networks and reduce financing costs by providing visibility and transparency on regulatory decision-making procedures and on future developments.

2030: Turning vision into reality

The network can be strengthened and renewed through the use of underground technology for the lowest voltages and by overhead technology for the highest voltages.

Targets on adapting the network to climate change have been set and the first milestones are being met.

The cost of these upgrades for consumers is controlled.

The transparent, stable and predictable regulatory framework encourages investors to finance the development of the network.

Action #6

Define the long-term economic trajectory of natural gas infrastructure

The ambitions in terms of energy transition require the operators of the networks that transport and distribute natural gas (fossil methane and biomethane) to reconcile maintaining the safety of the networks with a projected reduction in consumption. At the same time, the development of green gas requires investments to be reconfigured to prioritise local gas networks. At the same time, the requirements in terms of security of supply remain very high.

These factors result in an economic equation that must be planned for in advance, in which lower consumption finances networks that should not decrease at the same speed.

The next tariffs and the regulatory framework for this infrastructure must factor in these constraints and propose regulatory solutions that enable, through regional optimisation, the impact of these changes on consumers to be spread while allowing the necessary investments to be financed.

In this respect, the regulatory framework that will be set by CRE will play a central role and should provide consumers and investors with a clear view of the long-term economic balances of the natural gas networks.

2030: Turning vision into reality

The regulatory framework for gas infrastructure is adapted to the decline in the use of gas and the necessary integration of green gases. It is transparent, stable and predictable and reassuring for consumers and investors.

Action #7

Put in place a regulatory framework focused on investment in the development of infrastructures for new gases (hydrogen and carbon dioxide)

CRE will focus on prioritising the development of new gases. Its work will involve adopting and implementing the regulatory framework for this infrastructure with a view to ensuring consistent development in line with the gradual changes to the sector.

Regulatory needs should be differentiated between those at local and national levels (for (hydrogen) or by reference to the links in the relevant value chain (for carbon dioxide). For hydrogen, the regulations will need to be adapted to the specific challenges associated with developing local infrastructure, without compromising the creation of infrastructure on a larger scale. For carbon dioxide, the intensity of the regulation of certain links in the value chain will need to be based on the possible emergence of a competitive activity (capture and collection) or the maintenance of any natural monopolies that may arise (transport and outlets).

These developments will draw on the knowledge and experience gained over several decades working on natural gas networks and infrastructure.

2030: Turning vision into reality

A flexible regulatory framework, tailored to the developing nature of the H₂ and possibly CO₂ sectors, is introduced by CRE for shared infrastructure.



GUIDELINE 3

MOBILISING ALL STAKEHOLDERS TO DEVELOP FLEXIBILITIES

The energy transition is based on increased electrification, while ensuring efficient energy use over the long term, and on the massive development of renewable energies in addition to nuclear plants. Integrating such a large volume of non-dispatchable energies into the electricity system is a challenge. To overcome this challenge, all flexibilities will be mobilised: storage, ensuring that demand responds to price signals (adaptation of consumption, load-shedding, self-consumption), participation of renewable energies in market mechanisms, and also by using the option of balancing variations in production offered by interconnections.

CRE plays a major role in the implementation of mechanisms that encourage its development.

Action #8

**Create the conditions for the cost-effective development
of decarbonised flexibilities, including storage**

Action #9

**Make renewable energies a fully-fledged aspect of the flexibility
of the electricity system**

Action #10

**Encourage the development of innovative contracts to move consumption
to the least busy times for the electricity system**

Action #11

**Promote the efficient development of self-consumption,
enabling consumers to take ownership of the energy transition**

Action #8

Create the conditions for the cost-effective development of decarbonised flexibilities, including storage

To facilitate the development of storage capacities, CRE will continue to ensure that the facilities may have access to the various market segments and that the conditions governing access to the network are representative of the costs actually incurred for the system. CRE will seek to remove the barriers that continue to hinder their integration into the electricity system, particularly during their connection, in relation to which their flexible nature must be taken into account.

The storage and load-shedding business model is built jointly across multiple markets. It requires an ability to provide services at a local level (internal congestion), national level (supply-demand balance, peak periods) and European level (cross-border exchanges of flexibilities). A central challenge for CRE is to allow the flexibilities to provide multiple services and therefore generate the associated revenues.

CRE will ensure that the architecture of the market and network mechanisms allows for the integration of flexibilities, in particular through:

- The reform of the capacity mechanism to meet the needs and challenges of new decarbonised flexibilities;
- Access to national and European platforms for exchanging balancing reserves;
- The application of a network rate adapted to the services provided.

In the NIAs, storage is an important lever of the energy transition and its business model is necessarily different from that of mainland

France. CRE will ensure that its methodology for supporting storage projects and the frequency of gates allows the various relevant technologies to develop in an optimal manner.

2030: Turning vision into reality

The flexibilities required by the system, such as storage and supply-demand balance, have developed in proportion to the renewable energies projected under the PPE and the management of peak demand, thereby allowing load-balancing prices to stabilise.

Their financing has been secured and they have been developed at the best possible cost, thanks to their valuation on the markets, including the new capacity mechanism, and connection offers adapted to their profile.

“Smart” connection conditions, subject to conditions, allow renewable storage capabilities to be connected in an accelerated manner, even in stressed areas.

In the NIAs, CRE has operated storage gates in each territory and instructs pumped-storage energy transfer station projects (STEP), where relevant for the regions.

Action #9

Make renewable energies a fully-fledged aspect of the flexibility of the electricity system

Participation in balancing the electricity system is not only an opportunity for renewable energies, but also an essential lever in consolidating their role in the energy transition. By being actively integrated into these mechanisms, they help to ensure the stability and reliability of the electricity supply.

The growing share of renewable energy in the mix means that renewable energy is subject to the same obligations as all other electricity generation facilities. Being a stakeholder in the balancing of the network also further increases the value of such production capacities and their acceptability.

To that end, CRE will ensure that renewable energies actively participate in RTE's adjustment mechanisms, comply with scheduling obligations and cease generating electricity in the event of negative prices.

2030: Turning vision into reality

Renewable energy sources (solar and wind, and run-of-river hydropower) have become contributors of flexibility by offering contracts on the balancing markets and ceasing production in the event of negative prices.

"Smart" connection conditions, subject to conditions, will allow renewable energy sources to be connected in an accelerated manner, even in stressed areas.

Action #10

Encourage the development of innovative contracts to move consumption to the least busy times for the electricity system

The energy transition requires production profiles (the development of intermittent sectors) and consumption profiles (new uses) to change. The development of all possible mechanisms to better match consumption and production is therefore an essential challenge in ensuring that the electricity system functions optimally. There are many ways in which consumers can contribute to this goal. In addition to load-shedding during peak periods, this flexibility involves providing incentives to consume electricity at times when energy, in particular electricity, is low carbon and inexpensive.

CRE, due to its role of setting network tariffs, proposing regulated tariffs for the sale of electricity, monitoring the retail market and supervising cooperation between network operators and suppliers, has a key role to play in the scaling-up of demand flexibilities, an aim of the draft PPE. It will complete its work on moving peak/off-peak hours as part of fixing the TURPE. It will ensure that price signals are passed onto consumers, both in mainland France and in the NIAs, in the contracts offered by suppliers. It will take steps to remove the barriers to innovation identified by market players.

2030: Turning vision into reality

The majority of consumers benefit from supply offers with price signals based, at least, on peak/off-peak hours, reflecting the voltages of the electrical system and its need for flexibility. Periods of high renewable energy production at zero marginal cost result in low price ranges benefiting consumers.

Certain types of electricity usage, such as for water heaters or electric vehicle charging, are systematically encouraged. Only consumers with little or no flexibility in their electricity use, despite all the management and home automation tools deployed, remain on basic contracts.

However, while self-consumption constitutes an easily understandable form of “price signal” and contributes significantly to the achievement of the objectives associated with the deployment of photovoltaic installations, the cost of supporting it can be very high for small facilities. This mode of consumption can also have negative effects on the system, particularly in the event of widescale development.

CRE will continue to analyse the impacts of self-consumption on the system and will help to create conditions for efficient development.

Action #11

Promote the efficient development of self-consumption, enabling consumers to take ownership of the energy transition

The development of self-consumption is one of the solutions that encourages consumers to shift their consumption to times of higher electricity generation. CRE will continue to encourage the development of self-consumption and will analyse the various possible models.

In particular, it will seek to remove the obstacles to coupling small self-consumption facilities with batteries.

2030: Turning vision into reality

The use of self-consumption is an aspect of adapting customer consumption to the needs of the electricity system. Residential and business consumers are becoming players in the energy transition by installing photovoltaic panels on their roofs, thereby reducing their energy bills. As a result of this investment, they are directly aware of this issue and encouraged to shift their consumption times or to consider storing the energy they produce, in order to match their consumption with the time at which electricity is generated by their photovoltaic facility.



MEETING THE NEEDS AND CHALLENGES OF CONSUMERS

The aim of opening up the energy markets to competition was to provide consumers with the best possible prices and services. The recent crisis has shown how difficult it is to cope with extreme situations. It also caused us to look more deeply at the need to guarantee the security of our energy supplies through the energy transition and through the strengthening of market mechanisms.

Consumer confidence in the energy markets depends first and foremost on ensuring that they function properly. The wholesale markets must reflect fair price formation on an overnight and term basis. The retail markets must also cover all the factors in the supply of electricity, in a clear manner, for end consumers.

The end of the mechanism for regulated access to incumbent nuclear electricity (ARENH) will result in EDF selling all the electricity it produces on the wholesale markets, leading to a sharp increase in transaction volumes.

The way in which the energy sector functions is complex, and CRE must work continually to improve all citizens and consumers' understanding of electricity and gas markets. CRE, in its capacity as a trusted third party, must allow consumers to choose the supply contracts best suited to their needs and uses.



GUIDELINE 4

ENSURING THAT THE WHOLESALE MARKETS WORK IN A MANNER THAT REFLECTS FAIR PRICE FORMATION

In an integrated European market, cooperation between energy regulators is a daily reality. It is especially necessary as it ensures that the wholesale markets operate in a correct and harmonised manner.

Through their supervision, CRE guarantees their transparency and integrity and protects operators and consumers.

Confidence in the energy system will be built on the credibility of such monitoring over time and on the effectiveness of the sanctions system in the event of inappropriate behaviour.

Action #12

**Increase the transparency of the way in which the
wholesale markets operate and implement
an effective monitoring system**

Action #13

**Act as quickly as possible in carrying out investigations
and impose sanctions as quickly as possible
in the event that fraud is established**

Action #12

Increase the transparency of the way in which the wholesale markets operate and implement an effective monitoring system

In order to increase the transparency of the way in which the wholesale markets operate, CRE will issue a number of publications that will allow the various stakeholders to better understand the observed phenomena. In addition to the regular publication of key information for market participants, CRE will also publish reports that analyse significant events that have had an impact on the markets.

CRE will continue to monitor the wholesale market at a high level by intensifying its proactive detection of behaviour that is potentially in breach of the EU Regulation on Wholesale Energy Market Integrity and Transparency (REMIT) and by continuously analysing external alerts. It will also rigorously monitor the positions held by operators on the futures markets and ensure that they have sufficient liquidity on the markets to avoid any adverse impacts on the fluidity of transactions.

Lastly, CRE will increase its visibility and presence in forums and meetings involving market operators, thereby exerting a preventive effect. It will actively contribute to market reforms at both European and national level, in order to ensure that they are developed in a consistent and secure manner.

2030: Turning vision into reality

The corpus of CRE's publications constitutes a set of reference documents that offers stakeholders a clear and accurate view of the underlying dynamics, helping them to anticipate and react to market developments in an informed manner and to assess past events. Liquidity on the electricity futures markets over the next five years is well developed.

The use of state-of-the-art digital systems, which may include artificial intelligence, allows CRE to act as a proactive regulator and monitor the strong growth in activity on the wholesale market. The rapid processing of external reports, the careful monitoring of the positions held by market participants and the enrichment of the jurisprudence resulting from its interventions, ensure that its monitoring is rigorous and sophisticated.

CRE's reputation as a proactive and innovative regulatory authority on the wholesale markets is strengthened and recognised and, as a result, is all the more dissuasive.

Action #13

Act as quickly as possible in carrying out investigations and impose sanctions as quickly as possible in the event that fraud is established

With a number of years of experience in carrying out investigations into suspicious behaviour by participants on the wholesale market, CRE benefits from lessons drawn from past investigations and sanctions decisions, which provide valuable insights and greatly enrich its intervention strategies and enhance their operational effectiveness.

CRE will consolidate the tools available to it as part of its investigations by using, where necessary, hearings or visits and seizure operations in order to strengthen the robustness of its reports. It will also transfer the complaint notification phase to CRE Board from the Dispute Resolution and Sanctions Committee (CoRDs) along with the negotiated sanctions procedure.

This greater speed of the sanctions procedure and the increase in the number and amount of sanctions imposed will strengthen the credibility of CRE in its ability to detect suspicious behaviour by operators and will help to dissuade them from adopting such behaviour.

2030: Turning vision into reality

The enquiry, investigation and sanction procedures are quick and effective. In this context, CRE uses all the investigation tools at its disposal (hearings with stakeholders, visits and seizure operations).

Penalties for breaches of REMIT are imposed as close as possible to the time when the abusive behaviour was carried out and help to deter operators from committing market abuse.



GUIDELINE 5

SECURING A COMPETITIVE AND ATTRACTIVE ENERGY FRAMEWORK TO BENEFIT THE FRENCH ECONOMY

The quality of its energy networks and energy infrastructure is an undeniable asset for France. It is an essential contributor to its industrial and tertiary competitiveness and is the result of an effective investment policy by network operators within an appropriate regulatory framework.

The adoption of a low carbon energy mix is also a key strategic lever in strengthening the competitiveness of our national and European industry. By positioning ourselves as a leader in green innovation, our industry can attract talent and investment, ensuring a leading role on the global stage.

These advantages must be combined with a competitive pricing policy, which must extend from large industrial sites to the smallest companies that link our territory, as well as local authorities, which have been facing significant challenges associated with supplying low-carbon energy in recent years.

The price of energy is also a central variable of households' purchasing power, and therefore of their consumption. All consumers, regardless of their size, should therefore be included within this competitive framework.

Action #14

Keep the quality of the networks among the best in the world

Action #15

Foster access to electricity for all at a competitive price

Action #16

**Ensure that consumers dependent on gas can also
access sustainable prices**

Action #17

**Promote the emergence of medium-term supply contracts
to provide better visibility on energy prices**

Action #14

Keep the quality of the networks among the best in the world

The quality of the electrical power supply in France is among the best in the world, with a level and frequency of power cuts that has been improving over a number of years. These performances are the result of effective investment policies by network operators supported by the TURPE and its regulatory framework, which seeks to support a strong and effective investment policy. The quality of electricity is an essential aspect of France's industrial and tertiary competitiveness (and the reason why France is well placed to host data centres). French market rules also allow manufacturers to develop flexibility (interruptibility, load shedding, etc.).

The same is true of the gas infrastructures. Its development in the 2010s enabled manufacturers to access competitive gas prices and an exceptionally secure supply, supported by reforms to the regulation of the underground storage of natural gas, implemented before the 2022 crisis.

CRE considers that the performance record of the networks needs to be maintained for the benefit of the French economy. To that end, it will continue to encourage network operators to continually improve the quality of power supply and service, giving them the means to cope with ageing infrastructure and the new constraints associated with climate change.

2030: Turning vision into reality

Against the backdrop of a sustained level of competition and the transformation of the energy system, the quality of service and supply on the French networks is among the best in the world.

Action #15

Foster access to electricity for all at a competitive price

The adoption of a low carbon energy mix is a key strategic lever in strengthening the competitiveness of our national and European industry. By positioning ourselves as a leader in green innovation, our industry can attract talent and investment, ensuring a leading role on the global stage. The industry must also charge the most competitive prices in order to sustain the development of its activity over the long term. This competitiveness must extend from large industrial sites to the smallest companies that link our territory, as well as local authorities. For all stakeholders, the challenges associated with supplying low-carbon energy have become significant in recent years. Energy prices for households must also remain under control to protect their purchasing power and support the increased electrification of demand.

Ensuring that prices are competitive for all entails the use of systems adapted to the needs of all categories of stakeholder.

Industrial consumers must be able to continue benefiting from an effective toolkit: a reduction in the TURPE, an exemption from the TICFE and offsetting of CO₂ emission quotas.

For all consumers, the legislator has decreed that, as a replacement for the ARENH mechanism, all the energy generated by EDF must be sold on the market. This system is supplemented by a mechanism for taxing sales of nuclear electricity by EDF in the event of a surge in prices on the wholesale market, and for the proceeds of this tax to be returned to end consumers in France. This mechanism is therefore intended to mitigate the effects of a crisis such as the one that occurred in recent years.

CRE will be responsible for all aspects of the architecture of this new system, and will operate it over the years in different areas:

- Assessment of EDF's revenue from the sale of the nuclear energy it produces;
- Analysis of the costs of the nuclear power plants, used as the basis for setting the tax thresholds;
- Assessment of amounts to be repaid by suppliers to consumers and the most transparent information possible for consumers.

CRE will be proactive in the event that any changes need subsequently to be made to the system.

2030: Turning vision into reality

The largest energy consumers still have access to competitive prices in Europe, by using the systems specifically available to them or as a result of entering into a partnership with one or more low carbon production assets.

For all consumers, the controlled cost of the energy mix is reflected in market prices. The post-ARENH regulation has been implemented with a high level of transparency in accordance with clear and functional operational procedures.

Action #16

Ensure that consumers dependent on gas can also access sustainable prices

Due to the fall in the number of gas consumers and the development of decarbonised gas production, gas bills may increase, mainly due to the increase in significant fixed unit costs.

While these price increases may be an incentive to move towards alternative fuels that emit less carbon, this is only relevant where a fuel can be substituted.

Analysis will therefore have to be carried out on the effects of such additional costs, both on industrial consumers who cannot eliminate gas from their processes and for households who have no alternative, so that the use of decarbonised gas remains sustainable.

2030: Turning vision into reality

CRE has contributed to the establishment of a gas roadmap (networks and financing) that provides appropriate incentives for substitutable uses and protects consumers who need to keep gas as a source of supply against an unsustainable rise in prices.

Action #17

Promote the emergence of medium-term supply contracts to provide better visibility on energy prices

While the crisis has tended to reduce the visibility of the price of medium-term supply offers, companies, local authorities and public purchasers need, in order to budget appropriately, better visibility of energy supply conditions over the medium and long term.

CRE will continue to monitor the development of 4-5 year supply offers. It is important that this developing market segment is structured based on healthy competition between operators. CRE will continue to monitor the structuring of the historical supplier's offers in order to ensure that alternative suppliers are also able to develop their business in this segment. It will also ensure that liquidity is developed for these time frames.

2030: Turning vision into reality

In 2030, a market in medium-term contracts, extending over at least five years, emerged in France for consumers and, in particular, businesses and local authorities, for whom predictability over the medium term is essential to the proper functioning of their economic activity.

The market in medium-term contracts is competitive, with a significant number of operators active in the market, with no distortion of competition in access to energy coverage over this time horizon.



GUIDELINE 6

ENSURING THAT THE RETAIL MARKET FUNCTIONS PROPERLY AND IS CLEAR TO AND UNDERSTANDABLE BY ALL, SO THAT CONSUMERS ARE ABLE TO CHOOSE A CONTRACT THAT SUITS THEM

The energy sector, while a strategic issue, has a number of different dimensions that are not always easy to understand and link together. This complexity may appear to be a form of opacity and generate mistrust of all sector participants among consumers.

The development of real and effective competition in the energy supply markets requires energy suppliers to compete in a manner that benefits consumers. To that end, and to enable consumers to make informed choices, they need to be provided with a system in which they can choose their suppliers and also have confidence in the quality and solidity of the range of offers available to them.

CRE, as a trusted third party, has a role to play in providing consumers with information relevant to their decision, but also in ensuring that the retail markets function properly.

Action #18

Establish a competitive market of strong, transparent and reliable suppliers through enhanced monitoring

Action #19

Meet the needs of consumers by supporting the development of new commercial contracts that better meet their expectations and provide them with control over their energy bills

Action #18

Establish a competitive market of strong, transparent and reliable suppliers through enhanced monitoring

In order to ensure that competition between energy suppliers benefits consumers, the latter must have access to a sufficient range of offers that meet their needs at the best possible price and to accurate information enabling them to make an informed choice and a guarantee that suppliers will meet their commitments. CRE will ensure that such competition is developed in all market segments, including in the regions in which local distribution companies operate.

The competitive market can only develop if consumers are confident that they can enter electricity and gas contracts with solid and reliable suppliers. The solidity of suppliers depends on the implementation of prudential rules applicable to suppliers of electricity and natural gas. These rules will deal with, among other things, supply cover obligations that are symmetrical to the price commitments contained in supply contracts, the monitoring of suppliers' financial capacities and the possibility of carrying out stress tests, and checks on suppliers' risk management strategies and their governance practices.

Commercial transparency is fundamental to a dynamic market because it is the primary condition of trust. By developing clear guidelines on the communication of offers and the transparency of prices, CRE encourages virtuous practices that help consumers to more easily compare available offers and make informed decisions. To make these measures as effective as possible, they must be enforced through specific legislation, drawn up in conjunction with the public authorities.

In order to ensure healthy competition for consumers and strengthen their confidence in suppliers, CRE will intensify its approach to monitoring the retail market, due to the increase

in the number of suppliers and offers and the abolition of the ARENH, which standardised a significant proportion of electricity supplies. CRE will publish an annual report on the monitoring of the retail markets, enriched with analysis of the consistency between the costs borne by suppliers and the contracts offered to end consumers, which will give confidence to all stakeholders that the market is functioning properly, and will contribute to its competitive dynamism.

2030: Turning vision into reality

All consumer segments in France, from residential consumers to large industrial consumers, have a diverse range of suppliers, from major network operators to local distribution companies.

These providers are all robust and reliable for consumers, who can focus their efforts on comparing the types of contract, prices and services offered. All suppliers meet the requirements relating to transparency, clarity and advice now imposed by law. All suppliers have secure energy supplies up to the level of the commitments made to the consumers in their portfolio, and the capacity to withstand unforeseen economic shocks.

In order to sustain the dynamism of the retail market, CRE has increased its monitoring of the retail market.

Action #19

Meet the needs of consumers by supporting the development of new commercial contracts that better meet their expectations and provide them with control over their energy bills

In order to better meet consumers' expectations, in particular relating to the cost of accessing energy, it is important that suppliers offer a variety of products and services.

In addition to the work of the Energy Ombudsman and the work of consumer associations, CRE is also responsible for providing the information needed by consumers to choose, in a fully informed manner, the contract that most closely suits their needs.

The contracts that are offered must meet the needs of each consumer while allowing them to change their consumption habits so that they can better control their overall energy bill. Fixed-price offers must be able to be made to consumers who prioritise stable energy prices.

With this in mind, CRE will continue to contribute to the emergence of diversified offers:

- It will work on removing obstacles to the development of innovative offers;

- Where necessary, it will publish price references in order to offer consumers benchmarks to help them choose their market offers in a more informed manner;

- It will develop regulated sales tariffs that – in the market segments where they continue to be available – enable more competitive offers to be freely developed, while participating, through changes to their structures, in the effort to diversify and adapt consumption to the realities of the electricity system.

2030: Turning vision into reality

Consumers have access to a variety of variable or fixed. They are more predictable over time and tailored to their needs and to the constraints of the energy system, while allowing them to keep control over their bills.

The competitive market continues to grow and is becoming the majority market, providing consumers with access to the services most useful to them. Regulated tariffs, or price references, where they still exist, continue to act as a benchmark in making choices.

The proportion of French people who consider themselves to possess sufficient information to choose a supplier and the contract appropriate to their needs is higher than in 2025.



PARTICIPATING IN THE DEVELOPMENT OF A COMPETITIVE AND SOVEREIGN EUROPE

Energy, one of the core areas of cooperation in Europe since the start of European integration (Euratom Community, 1957), currently faces a number of different challenges, in particular the challenge associated with its contribution to the competitiveness and sovereignty of the European Union.

Mario Draghi made energy a key focus of his report on the future of European competitiveness published in September 2024. The European energy system needs to be further integrated, now more than ever, in order to strengthen our climate and geopolitical resilience, by maximising the use of the existing infrastructure and giving full effect to the recently adopted reforms.

The other part of the European strategy in which CRE is fully involved is the continuation of decarbonisation efforts by developing local industrial sectors that will be able to provide Europe with better control over its value chains and therefore the strategic autonomy it needs. The transition to low-carbon energy is an essential lever in Europe's future competitiveness, which will enable it to gradually free itself from its dependence on imported fossil fuels.



GUIDELINE 7

INFLUENCING IN AN INTEGRATED EUROPEAN ENERGY MARKET

The European energy market is structured around a robust legal framework that makes it one of the most integrated markets in the world. The most recent legislative changes, adopted in the wake of the energy crisis, have strengthened the resilience of the European energy system by accelerating the development of local, low-carbon energy production and creating a true long-term market with greater price stability. Supplementing these laws are texts of a more technical nature such as implementing regulations issued by the European Commission or network codes.

In order to achieve the results requested by the European legislator, the different levels of text need to be properly coordinated. CRE plays a key role in the Agency for the Cooperation of Energy Regulators (ACER) alongside its European counterparts, acting as a driving force in the adoption of methodologies that give full effect to European rules. This work is enriched by the discussions between CRE and its regulatory counterparts that take place on the Council of European Energy Regulators (CEER).

This is how CRE effectively exerts influence in the European discussions. As choices concerning energy mixes remain the responsibility of national governments, the objective is not to target a single electricity price across Europe, but to apply the existing legal framework in compliance with the principle of subsidiarity and to develop interconnections where they can create value for the community.

Action #20

**Develop a more detailed European framework
that maintains the principle of subsidiarity**

Action #21

Reap the benefits of existing and future interconnections

Action #20

Develop a more detailed European framework that maintains the principle of subsidiarity

As a result of its ongoing participation in European working groups (ACER and CEER) and thanks to its involvement in the various deliverables and the governance meetings of these bodies, CRE will continue to contribute to ensuring that governance is fully in line with the European objectives. It will also represent the specificities and realities of the French electricity market before the other European nations.

In addition, given the unprecedented scale of the investment required in order to complete the energy transition, traditional financing tools will need to be supplemented. In this context, CRE will use all its expertise in the financing of investments in the energy sector and in particular in the networks to assist the French authorities at future negotiations, with a view to ensuring that France and all other countries have access to a wide range of financing solutions.

2030: Turning vision into reality

The measures adopted by the European Union following the 2022-2023 crisis have been fully implemented and are satisfactory. They have enabled the European energy market to attract investors and manufacturers thanks to a predictable and stable regulatory framework.

CRE, as an active member of the ACER, ensures that the contribution of the French energy system to the overall functioning of the European market is properly reflected in the elaboration of future rules, in compliance with the principle of subsidiarity.

CRE supports project leaders and network operators so that they can make optimal use of the new European financing tools with the aim of reducing costs for all consumers.

Action #21

Reap the benefits of existing and future interconnections

The recent crisis has definitively demonstrated the key role played by interconnections in the EU in ensuring the continuity of energy supplies. Accordingly, when the availability of French nuclear energy was at its lowest, we were able to rely on the grid of electrical interconnections to obtain supplies without disruption. This incident demonstrated that the interconnections were economically profitable. They also play an essential role in improving the flexibility of the electricity system by allowing electricity to be exchanged between different regions or countries of the EU, by balancing variations in production across a region that is wider than simply the national territory.

That is also true for gas. Through its diversified supplies and robust and flexible infrastructure, France contributes significantly to the resilience of the European gas market.

In the future, it is clear that in order to develop renewable energies in places where they are abundant and provide flexibility, Europe will need more electricity interconnections.

Between now and 2030, CRE will carry out work in the following three areas:

- Developing the long term as a key period for electrical interconnections with a view to creating an efficient market;
- Investing in electrical interconnections where they effectively contribute to energy resilience and decarbonisation, factoring in the necessary reinforcement of internal networks;
- Maintaining the high level of performance of the electricity transmission operator in the management of cross-border capacities and the availability of interconnections at French borders.

2030: Turning vision into reality

The interconnection projects that are in progress are operational and exchanges at borders are maintained at a sustained high level, enabling all decarbonised energy to be optimally used in the European Union.

One or more new interconnection projects identified as profitable for the French energy system have been approved.

The European rules on the operation of the network and interconnections have been optimised and simplified and contribute to the demand for flexibility.



GUIDELINE 8

TRANSFORMING THE ENERGY TRANSITION INTO AN OPPORTUNITY FOR DOMESTIC AND EUROPEAN INDUSTRIAL SECTORS

Action #22

Promote the development of the French and European industrial sectors

The investments needed to transform our energy system, whether made in production facilities or networks, must benefit French and European industries. This involves scaling up the industrial sectors on our continent and developing the skills needed to structure them.

CRE will work on creating conditions favourable to such a dynamic. This will include:

- The introduction in tenders of criteria relating to industrial and territorial issues, in compliance with the conditions under the Net Zero Industry Act (NZIA);
- Network operators acting as principals in locating know-how and industrial capacities in France and Europe.

2030 : une réalité pour demain

All calls for tender include ambitious but realistic and controllable criteria enabling European industries to participate in the manufacture of production facilities. The development schedule for the various projects is also compatible with the upskilling of the industrial sectors.

The regulatory framework put in place by CRE has supported network operators, particularly in terms of their supply strategy, thereby ensuring that the growth of investment in the networks translates into industrial benefits at national and European levels.

Levers to promote CRE's actions in France and internationally

Drawing on its experience and expertise acquired over the past 25 years, CRE has shown that it has the levers to promote its actions. Accordingly, its work is shared through conferences, public hearings and other forms of communication, which fuel public debate and enrich the regulatory framework, both in France and abroad.

Engaging in public debate

The work of CRE will continue to provide independent insight to the Government and Parliament. CRE will participate in discussions on all energy-related issues as part of its various speeches, at seminars, conferences and in conversations with the press, both in and outside France, as well as at parliamentary hearings and, more generally, in its dealings with elected representatives.

At the same time, CRE will continue to develop new cooperative ties with various stakeholders at the academic level. This approach will be supported by the provision to academic institutions of the data

collected by CRE in connection with its duties, in order to encourage applied research on that data. It may also publish or contribute to the publication of research papers. CRE will increase its interactions with economic and sectoral think tanks and with public bodies to provide insight and benefit from the lessons drawn from their work.

Lastly, CRE will continue its forward-looking work in which it reviews, alongside all other stakeholders in the energy world, new frameworks for production, transport, energy consumption and regulation prior to their implementation.



Sharing our economic and regulatory expertise and our values at the international level

CRE will remain involved and will strive to be a key player in cooperating with all international stakeholders. First of all, it will maintain its involvement with RegulaE. Fr, the network of French-speaking energy regulators for which it acts as secretary, and which will celebrate its tenth anniversary in 2026. CRE will also continue to honour its commitments and contribute to the work of MedReg, the network of Mediterranean regulators and to the work of the ERRA (*Energy Regulators Regional Association*), which brings together a wide variety of regulators from Eastern Europe and Asian countries.

CRE's participation in these multilateral bodies, as well as in the work of the OECD via the Network of Economic Regulators (NER), represents a source of enrichment from a number of different angles, through comparisons against various regulatory models and practices. CRE will also strengthen the development of its bilateral cooperation activities with other regulators to promote the exchange of best practices and mutual upskilling.

Attracting talent and devising a programme to develop and maintain expertise underpinned by cutting-edge digital tools

CRE will continue to promote a high level of excellence through its recruitment policy by seeking the highest level of expertise in the fields of engineering, economics and law. At the same time, CRE is striving to develop a working environment that fosters the professional development of its agents and offers them the opportunity to pursue career paths either internally or within the public sphere. This ambition requires CRE to strengthen its training policy and to increase the immersion of its executives in their external professional environment (with other stakeholders in the energy sector, in particular).

An additional fundamental issue is making its IT systems secure, as they are key to it properly exercising its duties. In 2025, CRE was the first French independent administrative authority to receive NIS 2 approval. It is also a driving force in the secure use of advanced digital systems and artificial intelligence to facilitate the management of everyday tasks, allowing each of its agents to fully devote themselves to the fundamental objectives.

At a glance



MAKING THE ENERGY TRANSITION A SUCCESS

>> Guideline 1

Ensuring economic efficiency in the transformation of the energy mix

Action #1 Increase the clarity and efficiency of support mechanisms

Action #2 Efficiently operate support mechanisms for low-carbon production methods

Action #3 Take account of the specific nature of small isolated systems in non-interconnected areas – NIAs

>> Guideline 2

Leading the transformation of the electricity and gas networks

Action #4 Support the electrification of the economy by developing networks

Action #5 Modernise electricity networks at a controlled cost for consumers

Action #6 Define the long-term economic trajectory of natural gas infrastructure

Action #7 Put in place a regulatory framework focused on investment in the development of infrastructures for new gases (hydrogen and carbon dioxide)

>> Guideline 3

Mobilising all stakeholders to develop flexibilities

Action #8 Create the conditions for the cost-effective development of decarbonised flexibilities, including storage

Action #9 Make renewable energies a fully-fledged aspect of the flexibility of the electricity system

Action #10 Encourage the development of innovative contracts to move consumption to the least busy times for the electricity system

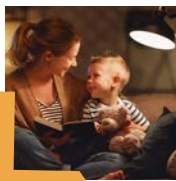
Action #11 Promote the efficient development of self-consumption, enabling consumers to take ownership of the energy transition

Levers to promote CRE's actions in France and internationally

>> Engaging in public debate

>> Sharing our economic and regulatory expertise and our values at the international level

>> Attracting talent and devising a programme to develop and maintain expertise underpinned by cutting-edge digital tools



MEETING THE NEEDS AND CHALLENGES OF CONSUMERS

>> Guideline 4

Ensuring that the wholesale markets work in a manner that reflects fair price formation

Action #12 Increase the transparency of the way in which the wholesale markets operate and implement an effective monitoring system

Action #13 Act as quickly as possible in carrying out investigations and impose sanctions as quickly as possible in the event that fraud is established

>> Guideline 5

Securing a competitive and attractive energy framework to benefit the French economy

Action #14 Keep the quality of the networks among the best in the world

Action #15 Foster access to electricity for all at a competitive price

Action #16 Ensure that consumers dependent on gas can also access sustainable prices

Action #17 Promote the emergence of medium-term supply contracts to provide better visibility on energy prices

>> Guideline 6

Ensuring that the retail market functions properly and is clear to and understandable by all, so that consumers are able to choose a contract that suits them

Action #18 Establish a competitive market of strong, transparent and reliable suppliers through enhanced monitoring

Action #19 Meet the needs of consumers by supporting the development of new commercial contracts that better meet their expectations and provide them with control over their energy bills



PARTICIPATING IN THE DEVELOPMENT OF A COMPETITIVE AND SOVEREIGN EUROPE

>> Guideline 7

Influencing in an integrated European energy market

Action #20 Develop a more detailed European framework that maintains the principle of subsidiarity

Action #21 Reap the benefits of existing and future interconnections

>> Guideline 8

Transforming the energy transition into an opportunity for domestic and European industrial sectors

Action #22 Promote the development of the French and European industrial sectors

See you in 2030!

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