

Europe's 2040 Renewable Energy Framework:

Affordable, Abundant &
Climate Aligned

How the Renewable Energy Directive can unlock emissions reductions, cut costs, and strengthen Europe's energy security to 2040

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INTRODUCTION

DCC welcomes the opportunity to contribute to the European Commission's call for evidence on a revised Renewable Energy Directive. As a leading supplier for heat and transport fuels across Europe, serving 9 EU Member States (plus UK and Norway) and millions of customers, DCC is playing a major role in Europe's energy transition.

In the last 3 years, DCC has invested more than €750 million to meet our energy transition strategy through reducing the carbon intensity of our existing fossil fuels business by introducing renewable liquid fuels and gases, while also building a leading electron-based energy management business. These types of investments mean we have achieved an 11% reduction in our scope 3 emissions against our 2022 baseline totalling 4.5 MtCO₂.

This shows the scale of emissions reductions that are available in the near term if the right policy framework is in place. However, DCC believes that to unlock the next phase of decarbonisation, a shift is needed in the renewable energy framework, one that simultaneously delivers emissions reductions, preserves industrial competitiveness, and strengthens Europe's energy security and independence, while recognising that different sectors will require different decarbonisation pathways.

CONTEXT

The European Union has set a clear direction of travel: achieving a 90% reduction in greenhouse gas emissions by 2040 will require a fundamental transformation of the energy system. Significant progress has been made in the power sector. However, the challenge now lies in delivering decarbonisation across end-use sectors — particularly heating, transport and industry — where progress remains uneven. Heating and cooling alone account for around 50% of final energy demand and remain approximately 70% fossil-based¹.

There is also an urgency to this change: the Effort Sharing Regulation (ESR) sets a 40% greenhouse gas (GHG) reduction target in heating & cooling by 2030 against its 2005 benchmark. However, current measures have only achieved ~27% GHG emissions reductions.. The picture across Member States also varies significantly. For example, Ireland has only decreased its heating emissions by ~10% by 2023 while it has set a national target of ~42% by 2030; France on the other hand has reduced its heat related GHG emissions by ~26%, when compared with its national target of ~47%.

Electrification will be central to addressing this challenge. It represents the most efficient near-term pathway for many applications, particularly in newer, urban buildings, as well as medium-light duty and short-haul transport. DCC is actively investing in delivering electrification solutions, including solar installation, battery storage and heat pumps and EV charging, reflecting our appreciation of its importance in the energy transition.

At the same time, the transition must be grounded in the realities of Europe's energy system and its building stock. Electrification will not be uniformly feasible or cost-effective across all segments. In heating, while most

¹ https://energy.ec.europa.eu/topics/energy-efficiency/heating-and-cooling_en

urban and well-connected households are expected to electrify, a significant share of rural and off-gas-grid buildings face structural barriers, including grid constraints, building characteristics and high upfront retrofit costs.

In industry, electrification will play a central role in decarbonising a large share of heat demand, particularly in low- and medium-temperature processes. However, residual demand is expected to persist in higher-temperature and process-specific applications, as well as in sites constrained by retrofit or grid capacity, where renewable fuels can provide a complementary decarbonisation pathway.

In transport, electrification is expected to dominate in light-duty segments, while sustainable fuels will remain necessary for heavy-duty and long-distance applications where direct electrification is more challenging.

This paper sets out DCC's position on the revision of the Renewable Energy Directive, focusing on four key areas:

1. Heating
2. Transport
3. Governance
4. Electrification

Together, these elements define whether RED IV can deliver a framework that is ambitious, affordable and implementable, while reinforcing Europe's competitiveness and energy resilience.

1. HEATING

THE CHALLENGE

Across the EU, more than 130 million people live in rural areas, with around 23 million homes using oil and LPG for heating² and 700,000 businesses using LPG for heat and process heat³. The GHG emissions from use of heating oil and LPG amount to more than 100mt/year. Reducing EU CO₂ emissions by 90% in 2040 vs 1990 would equate to maximum emissions of just under 400mt/year by 2040; current emissions from heating oil and LPG thus represent more than 25% of this target. As such, this consumer cohort urgently requires tangible decarbonisation options.

While heat pumps will be a solution for many of these consumers, this will not be uniformly the case, and their deployment will be constrained by building suitability, infrastructure and cost.

Across EU member states, average installation costs for air-source heat pumps range between €14,000–€17,000⁴ in Ireland and reach up to €28,000 in Germany⁵. This is before the cost of a retrofit, which according to research from Ireland, has a median cost of €22,914 for an apartment to €66,503 for a detached house.⁶

The disruption and dislocation caused by work being done on a house can also be significant for consumers. Research from Ireland has shown that “over 40% of homeowners are highly unlikely to undertake a deep retrofit or to switch to a heat pump heating system” and as such “any attempt to reduce emissions from this cohort of homeowners must utilise alternative pathways”.⁷

This is also true for some industrial processes. For example, in aluminium melting, while electrification of aluminium melting achieves an efficiency gain of around 13% compared to gas-fired heating, this efficiency gain is not sufficient to offset the higher cost of electricity relative to LPG or renewable liquid gases (rLG), meaning that operating energy costs remain materially higher in the electrification case than for LPG or an rLG blend⁸.

As a result, there is expected to be significant residual demand for liquid gases and oils across the EU for the coming decade as illustrated in the case of LPG demand modelled by Frontier Economics (Fig 1).

² Energy consumption data from Eurostat, EU27 Energy Balances, 2023.

³ https://www.liquidgaseurope.eu/wp-content/uploads/2025/03/final_outlook_LGE_no_annex10.03.pdf

⁴ <https://www.seai.ie/sites/default/files/publications/Median-costs-of-individual-energy-upgrades.pdf>

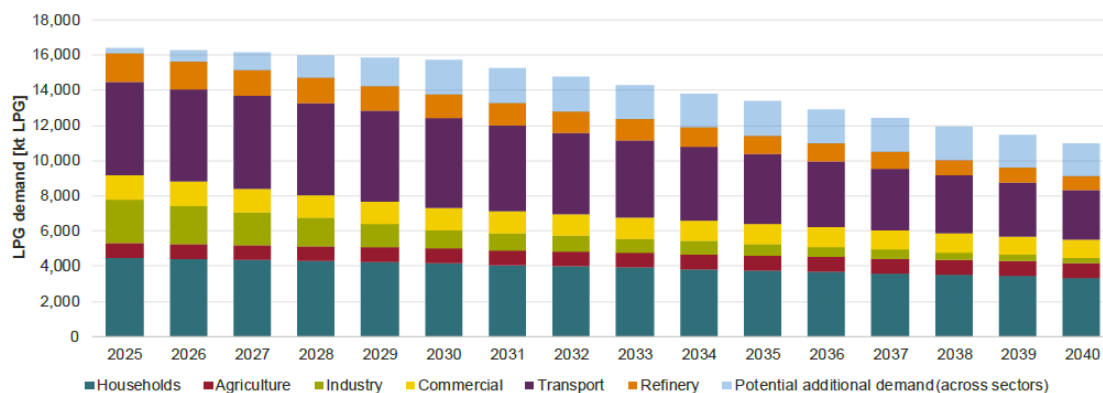
⁵ <https://www.pv-magazine.com/2025/03/13/heat-pumps-in-germany-nearly-twice-as-expensive-as-in-uk>

⁶ https://www.esri.ie/system/files/publications/QEC2026SPR_SA_Lynch.pdf

⁷ https://www.esri.ie/system/files/publications/QEC2026SPR_SA_Lynch.pdf

⁸ Frontier Economics report [add link when available]

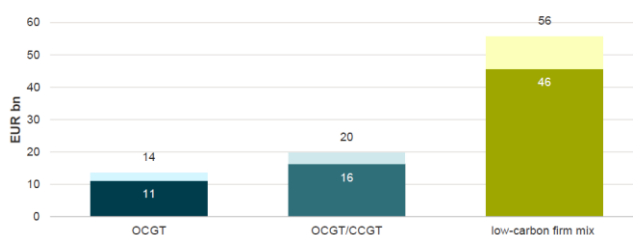
Fig 1: Projected liquid gas demand for energy purposes, by sector.



Even if financial and behavioural barriers could be overcome, the system costs of fully electrifying liquid gas and oil demand would be significant. Recent research has found that electrifying current LPG demand alone would increase electricity consumption by around 101 TWh per year, representing an additional 4% of total EU 27+UK, CH, NO power demand⁹.

Such a rise in power demand would in turn raise winter peak capacity requirements by more than 20 GW¹⁰. Maintaining system adequacy under these conditions could require substantial investment in backup capacity, namely in the form of gas fired power plants, estimated at €11–56 billion depending on the technology mix¹¹.

Fig 2: Capacity Requirements to cover additional peak load¹².



⁹ Frontier Economics report [add link when available]

¹⁰ Frontier Economics report [add link when available]

¹¹ Frontier Economics report [add link when available]

¹² Frontier Economics report [add link when available]

As such, a system design that relies exclusively on electrification risks increasing overall system costs, leaving consumers without viable decarbonisation options in the short to medium and extending demand for fossil fuels.

THE SOLUTION

Renewable fuels can play a complementary role alongside electrification for those hard to electrify customer segments. Based on the aforementioned behavioural dynamics of customer segments, such options must be supported to unlock near-term decarbonisation.

However, demand for renewable heating remains structurally underdeveloped in EU energy policy. While transport is supported by a binding supplier obligation, heating continues to rely on indicative targets and national implementation. This has resulted in slower deployment of renewables in heating compared to other sectors, despite the scale of emissions it creates.

In this context, the lack of a demand-side mechanism is a key structural barrier. Without a clear and predictable signal, investment in renewable heating fuels remains constrained, limiting supply development and slowing cost reductions, despite the fact that solutions, including both renewable liquid fuels such as HVO and rLGs are readily deployable.

Member States are already beginning to address this gap. Ireland, for example, is developing a Renewable Heat Obligation, which would introduce a supplier obligation for heating fuels and create a market-based framework for scaling renewable alternatives. Similar approaches are being considered in other Member States, reflecting a broader shift towards demand-driven instruments.

A renewable heat obligation provides a practical and scalable solution to address these challenges. It enables a gradual transition, allowing consumers to decarbonise over time while avoiding immediate, high upfront costs.

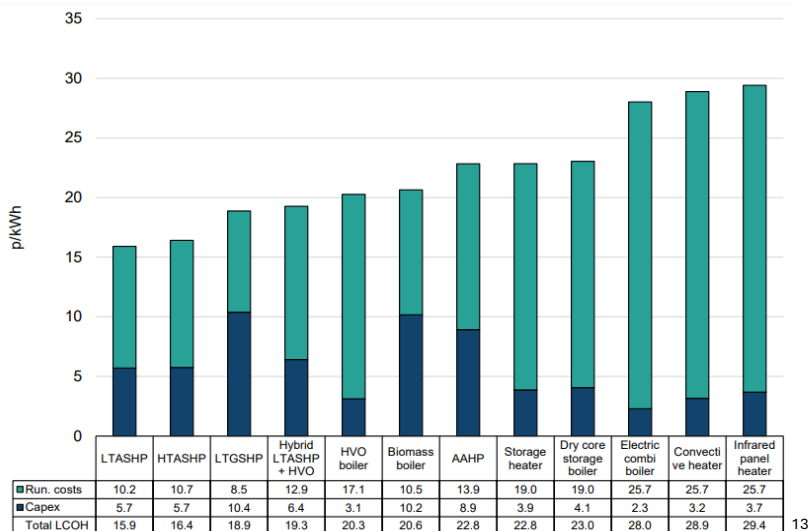
A GHG intensity-based design is particularly suited to this objective. It rewards emissions performance, supports innovation and ensures that different technologies and fuels can compete on a level playing field.

THE IMPACT

A. AFFORDABILITY:

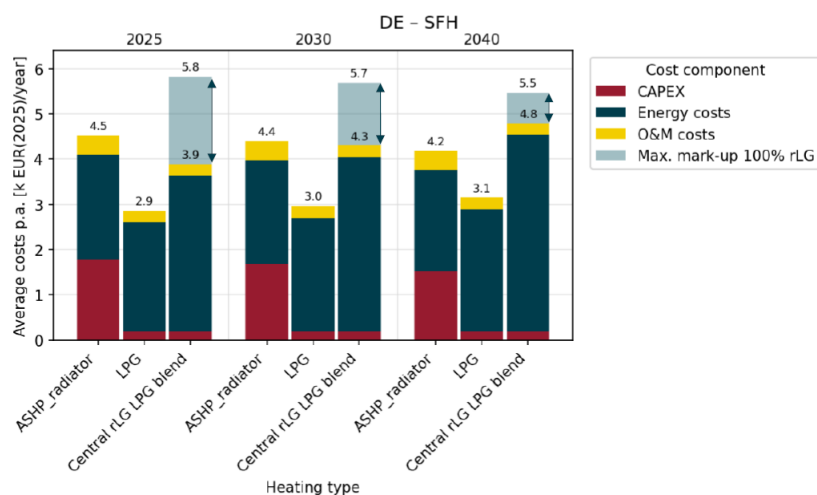
A combination of electrification and renewable fuels in heating will ensure affordable decarbonisation for all. Recent research from the UK government demonstrates the cost competitiveness of HVO boilers, relative to electrification alternatives.

Fig 3: LCOH results for alternative heating systems in modelled GB properties for a larger detached off-gas house archetype (2024 prices).



While these studies are based on different methodologies, geographies and cost metrics (e.g. LCOH vs TCO), they consistently show that renewable fuels fall within a comparable cost range to electrification solutions. In this context, recent research indicates that renewable liquid gases are likewise a cost-efficient intervention in certain applications (see Fig. 4), particularly where electrification requires higher upfront investment or system adaptation, while also providing an immediate decarbonisation option where gaseous infrastructure is already in place.

Fig 4: German reference house and associated heating TCO (only including installation and running costs without retrofitting).



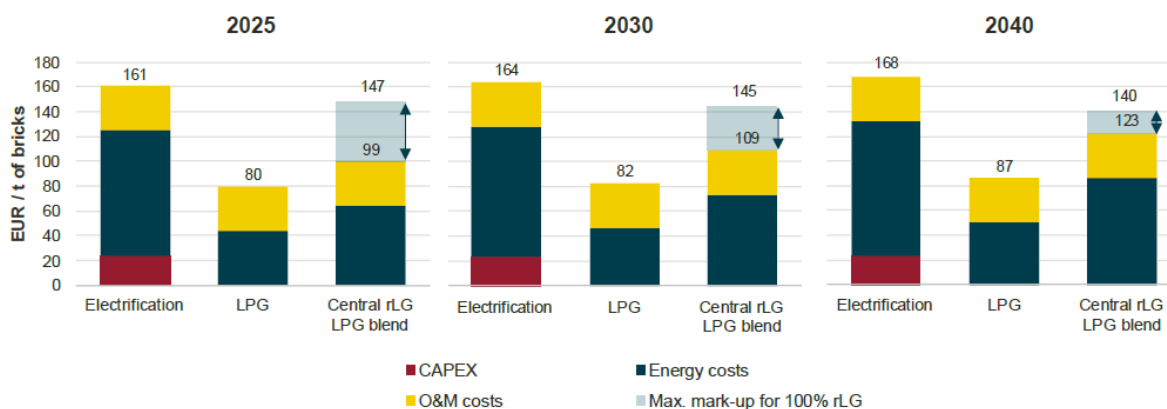
13 <https://assets.publishing.service.gov.uk/media/6917213f9d50fc2fe8161800/alternative-low-carbon-heating-technology-costs-analytical-annex.pdf>

B. COMPETITIVENESS:

The economic rationale for high-temperature industrial production is even more compelling and demonstrates the importance of a mixed technology approach from a competitiveness perspective. Analysis shows that renewable fuels are often better suited for sectors such as brick firing, asphalt production and metals. In such circumstances, electrification can require substantial capital investment and process changes. By contrast, electrification performs best in low-temperature processes where efficiency gains are higher, and system integration is easier¹⁴.

This points to the need for a differentiated approach, where technologies are deployed based on operational requirements, cost and infrastructure constraints.

Fig 5: Cost comparison for brick firing processes.



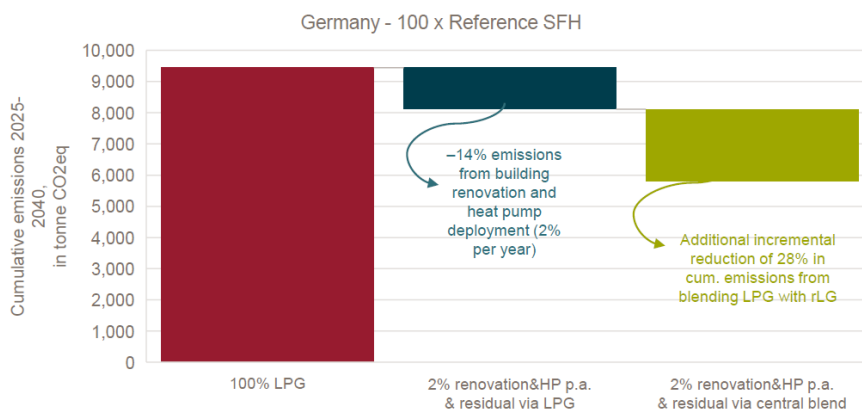
C. EMISSIONS:

Depending on feedstock, renewable fuels can deliver up to 80–90% emissions reductions compared to fossil alternatives and are available today, with no infrastructural changes needed¹⁵. Furthermore, recent research by the UK government found that based on the current electricity mix, HVO boilers in fact result in about half the amount of emissions as an air-to-air heat pump¹⁶.

Evidence also shows that combining electrification with renewable fuel deployment significantly accelerates decarbonisation. Analysis indicates that combining heat pump uptake with renewable liquid gas blending can increase cumulative emissions reductions by up to three times compared to electrification alone, particularly in off-grid building segments¹⁷.

¹⁴ Frontier Economics report [add link when available]

Fig 6: Cumulative emissions and emission reductions 2025-2040 at for German illustrative housing district of 100 reference houses¹⁸.



According to this analysis, cumulative emissions from the illustrative district of 100 houses using fossil LPG alone would be around 9,500 tons between 2025-2040. With 2% of houses undergoing renovation and installing a heat pump every year, cumulative emissions would fall by around 1,300 tons. If an rLG blend were to substitute fossil LPG in the non-renovated houses, the fall in cumulative emissions would almost treble to around 3,500 tons.

D. SYSTEM RESILIENCE & ENERGY INDEPENDENCE:

Combining electrification with renewable fuels to decarbonise heating would likewise increase Europe’s energy system resilience and with a supportive policy framework, could reduce import dependence.

Research has shown that supply of rLG could scale quickly, and under high deployment scenarios, could reach median annual production of 7,543 LPG-eq kt (96.4 TWh) and 27,389 LPG-eq kt (350 TWh) by 2050. This would be sufficient to substitute all of today’s fossil LPG consumption with rLG, under high deployment scenarios facilitated by supportive policy.

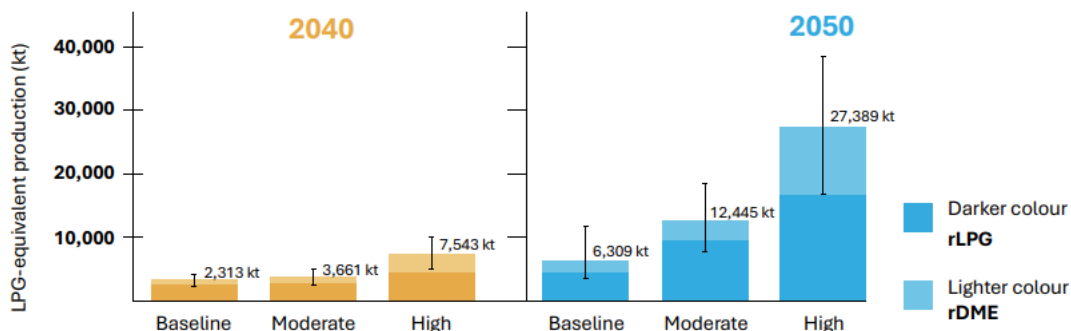
¹⁵ <https://www.ieabioenergy.com/publications/advanced-biofuels/>

¹⁶ Table 6: Present and future carbon intensity of heating by alternate heating technologies (kgCO₂e/kWh)n <https://assets.publishing.service.gov.uk/media/6917213f9d50fc2fe8161800/alternative-low-carbon-heating-technology-costs-analytical-annex.pdf>

¹⁷ Frontier Economics report [add link when available]

¹⁸ Frontier Economics report [add link when available]

Fig 7: Production scenarios for renewable liquid gas production in 2040 and 2050, Source, NFCC and Frazer Nash.



Renewable liquid gases can also be produced from a diverse range of waste-based feedstocks, using a variety of production pathways. The diversity of feedstocks and production pathways means that there is no single point of failure from either a feedstock or technology supply perspective, insulating the market from exogenous supply shocks.

Fig 8: Selection of pathways for renewable liquid gas (rLG). All pathways marked with a red dot are dedicated solely to producing rLG; in all other cases, rLG is a by-product of the process. It should be noted, however, that it is possible to modify a process so that the by-product becomes the primary target fuel. Source: NFCC and Frazer Nash.

Pathway	Product or co-product	Feedstock used
Alcohol to Fuel (LPG)	Renewable LPG	Ethanol
■ Biogas (LPG)	Renewable LPG	Biogas
■ Biogas (DME)	Renewable DME	Biogas
CO ₂ and H ₂ to fuel (DME)	Renewable DME	CO ₂ Hydrogen
CO ₂ and H ₂ to fuel (LPG)	Renewable LPG	CO ₂ Hydrogen
Gasification with FT (LPG)	Renewable LPG	MSW Waste wood and residues
■ Gasification (DME)	Renewable DME	MSW Waste wood and residues
HVO & HEFA (LPG)	Renewable LPG	Tallow UCO Virgin Oils
Pyrolysis (LPG)	Renewable LPG	MSW Waste wood and residues Waste tyres

DCC RECOMMENDS TO:

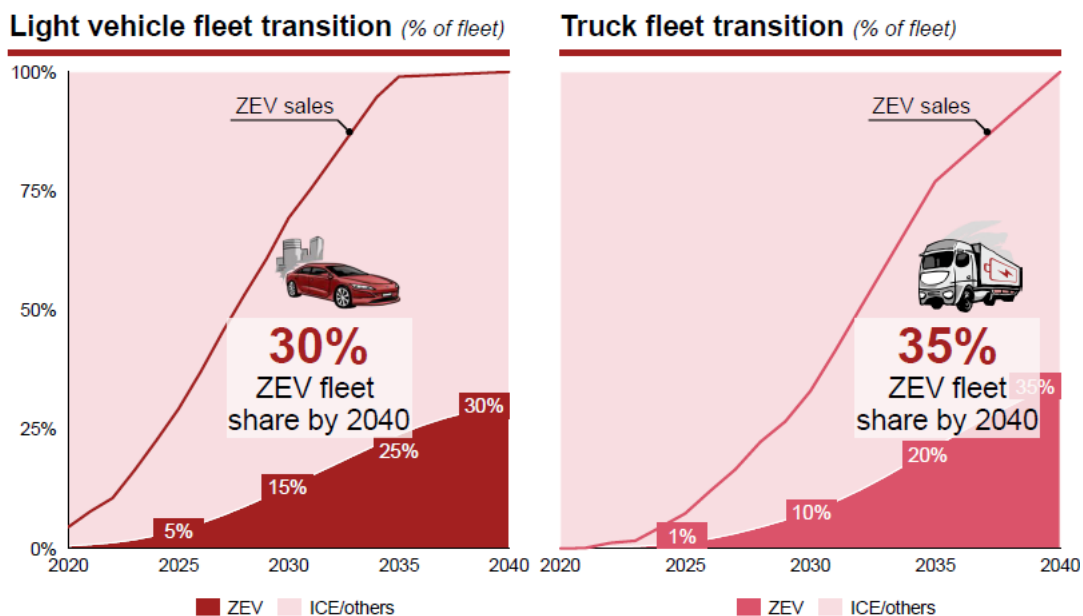
- Introduce **an EU-wide renewable heat obligation** for liquid and gaseous fuels, aligned with the transport supplier obligation model.
- Base **the obligation on GHG intensity reduction**, allowing different technologies and fuels to compete based on emissions performance.
- Ensure implementation of flexible compliance options at Member State level, including **tradable certificates, bank-and-borrow and buy-out mechanisms and targeted protection for vulnerable consumers**.

2. TRANSPORT

THE CHALLENGE

Despite forthcoming mandates regarding sales of zero emissions vehicles by 2035 (light) and 2040 (heavy), research shows that 65% of the EU’s vehicle fleet will continue to be powered by an internal combustion engine by 2040.

DCC is actively supporting the decarbonisation of transport through a multi-technology approach. Across its network, the company supplies lower-carbon liquid fuels such as HVO, while also investing in electrification solutions, including high-power charging (HPC) infrastructure at retail sites, customer charging solutions and charge card services. This dual exposure provides direct insight into the practical challenges of scaling both electrification and renewable fuel deployment across different transport segments and use cases.



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However, under the Renewable Energy Directive, there are no targets for the blending of biofuels in either light- or heavy-duty road transport beyond 2030, despite the availability of mature renewable diesel solutions such

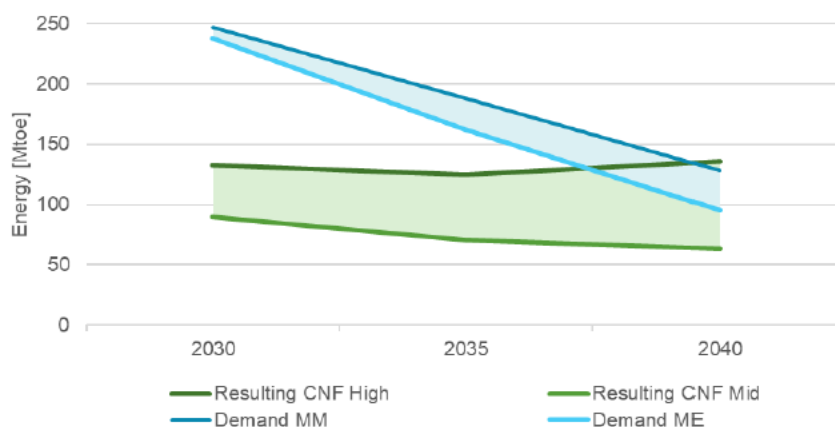
¹⁹ European Fleet Electrification, From Electric Vehicle Sales to a complete Fleet Transition, Strategy&, PwC

as HVO, which are already deployed at scale and can deliver substantial lifecycle emissions reductions which are even higher when produced from waste and residue-based feedstocks.

THE SOLUTION

Analysis has shown that depending on deployment scenarios, renewable fuels and advanced biofuels could meet 70-100% of the EU’s fossil fuel demand for road transport by 2040. While based on imports in the short-term, the analysis also indicates that in the mid-term – no later than 2040 – it will be possible to meet the fleet’s entire demand for liquid fuels from renewable raw materials available in Europe²⁰. In this sense, electrification and increasing biofuel demand should be seen as complementary tools in the journey toward a near-zero emissions fleet by 2040.

Fig 9: Overview of the relationship between the quantities of resulting carbon neutral fuels and the demand in the different scenarios (More Molecules & Max Electrons) with a focus on gasoline in the conversion²¹.



Consequently, we strongly believe that the European Commission must set ambitious blending obligations for the remaining internal combustion engine fleet between 2030 and 2040 and provide for stable investment conditions to ramp up domestic supply.

²¹ From raw material to fossil-free mobility: Europe's potential for a renewable fuel market

²¹ From raw material to fossil-free mobility: Europe's potential for a renewable fuel market

THE IMPACT

A. EMISSIONS:

Sustainable biofuels typically deliver lifecycle greenhouse gas savings of 70–90% compared to fossil fuels under the Renewable Energy Directive framework. This means that, as long as a substantial internal combustion engine fleet remains in operation, scaling the use of biofuels can deliver very significant emissions reductions—potentially amounting to hundreds of millions of tonnes of CO₂ savings annually across the EU by 2040, depending on deployment levels. This also contributes to reducing Europe’s dependence on imported fossil fuels, while supporting the competitiveness of the transport and fuels sectors.

B. AFFORDABILITY:

In this context, drop-in fuels such as HVO provide an immediate and cost-effective decarbonisation pathway. Fully compatible with existing vehicles and infrastructure, HVO enables emissions reductions without requiring upfront investment or fleet renewal, while also generating valuable co-products such as renewable LPG, naphtha and sustainable aviation fuel that enhance overall system efficiency.

DCC recommends to:

- Ensure RED IV maintains a **technology-neutral framework**, recognising both electrification and renewable fuels based on sector-specific needs.
- Maintain and strengthen **support for sustainable biofuels in transport**, especially in heavy-duty road, aviation and maritime sectors where alternatives remain limited.

3. GOVERNANCE

THE CHALLENGE

A credible and well-functioning governance framework is essential to ensure that renewable fuels can scale while maintaining trust in their sustainability.

The EU already has a comprehensive framework in place under the Renewable Energy Directive, including sustainability and greenhouse gas criteria, certification schemes and mass balance rules. These have enabled the development of a functioning market for biofuels across the EU. At the same time, concerns around fraud, traceability and inconsistent implementation across Member States have increasingly come into focus, particularly for waste-based feedstocks.

If left unaddressed, such issues risk undermining confidence in the certification system, distorting competition, and weakening the environmental integrity of renewable fuels. This poses a risk not only to the credibility of the sector, but also to the achievement of EU climate objectives. It also risks undermining investor confidence and delaying the scale-up of domestic renewable fuel production capacity.

THE SOLUTION

Greater transparency across supply chains, supported by tools such as the Union Database, can significantly improve traceability and reduce risks of double counting or misreporting.

We believe that there are a few measures that could alleviate the issue of fraud, such as:

- Increasing the frequency and rigour of on-site audits and inspections across the supply chain, including feedstock origin points and processing facilities.
- Improving coordination between national authorities and certification bodies, enabling more consistent enforcement across Member States.
- Leveraging digital tools, including the Union Database, to support real-time tracking and cross-checking of transactions.

THE IMPACT

Strengthening enforcement and traceability will deliver clear benefits across the value chain.

A. BUSINESS CERTAINTY:

A more robust and consistently enforced framework will create a level playing field for compliant operators, supporting investment, long-term market development and enabling European companies to scale innovative renewable fuel solutions with confidence.

B. PUBLIC TRUST:

Demonstrating that sustainability rules are effectively enforced will reinforce confidence among policymakers, consumers and stakeholders in the role of renewable fuels and reduce the risk of policy reversals or market disruption driven by integrity concerns.

C. GENUINE EMISSIONS SAVINGS:

Ensuring the integrity of feedstocks and supply chains is essential to delivering real, verifiable greenhouse gas reductions, in line with the objectives of the Renewable Energy Directive

DCC recommends to:

- Increase the **frequency and rigour** of on-site audits.
- Improve **coordination** between national authorities and certification bodies.
- Leverage **digital tools, including the Union Database**, to support real-time tracking and cross-checking of transactions.

4. ELECTRIFICATION

THE CHALLENGE

Electrification will be central to achieving the EU’s renewable energy objectives. However, while renewable electricity generation continues to scale, system integration, investment frameworks and demand-side participation are not evolving at the same pace.

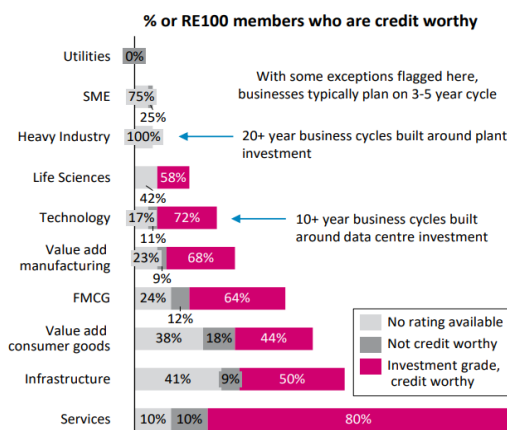
As part of this transition, DCC is actively supporting electrification across its customer base, including through the installation of rooftop and ground-mount solar and battery storage solutions, as well as supporting commercial and industrial customers in accessing renewable electricity through corporate Power Purchase Agreements (PPAs), brokerage services and direct supply.

In practice, deployment is increasingly constrained by connection delays and limited system flexibility, reducing the efficient utilisation of renewable generation.

From DCC’s operational perspective, two key barriers are limiting the scale-up of electrification solutions. First, the deployment of solar and battery storage projects remains constrained by permitting complexity and inconsistent treatment of co-located assets across Member States.

At the same time, electrification requires significant upfront investment. For many businesses, particularly SMEs, capital expenditure remains a key barrier despite strong long-term economics. While PPAs provide a mechanism to mobilise private capital and link renewable supply with demand, their uptake remains uneven and concentrated among large enterprises. In practice, credit requirements, contract complexity and limited access to aggregation and risk mitigation mechanisms restrict broader participation.

Fig 10: Impact of credit worthiness on access to PPAs across several sectors. Source: European Investment Bank.²²

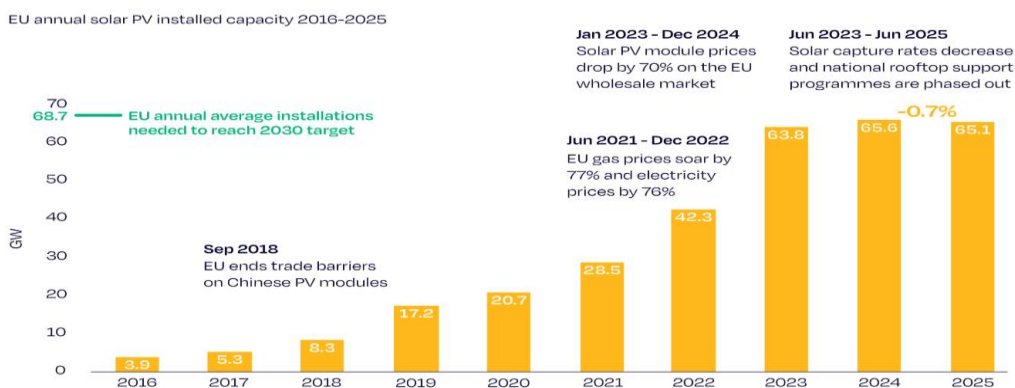


²² <https://advisory.eib.org/files/publications/attachments/commercial-power-purchase-agreements.pdf>

In addition, investment signals remain exposed to volatility in national support schemes. Frequent changes in incentives create uncertainty for project developers and consumers, contributing to uneven deployment patterns across Member States and increasing financing costs.

Electrification will be the most efficient pathway in many use cases, but its deployment remains constrained by system, investment and regulatory barriers. The challenge is therefore to ensure it can be delivered efficiently and at scale across all relevant segments of the economy.

Fig 11: Impact of financing volatility in solar energy deployment in the European Union. Source: SolarPower Europe.²³



THE SOLUTION

Addressing these constraints requires a more enabling framework for electrification within the RED, with a stronger focus on investment conditions, system integration and demand-side participation.

PPAs should be better recognised within the RED framework as a key market-based instrument supporting renewable electricity deployment, particularly where they contribute to additional capacity and reduce reliance on public support schemes. To expand participation beyond large corporates, the framework should facilitate aggregation models, clearer regulatory guidance and simplified access to contracting, including through the development of “one-stop-shop” approaches that reduce administrative complexity for businesses entering into PPAs.

At the same time, the Directive should better reflect the importance of system integration by supporting the co-location of renewable generation and storage. Hybrid projects combining solar and battery storage play a key role in reducing curtailment and improving grid flexibility and stability, yet are not consistently enabled under current frameworks. Ensuring that such projects are explicitly covered by streamlined permitting

²³ <https://www.solarpowereurope.org/insights/outlooks/eu-solar-market-outlook-2025-2030/detail>

procedures, including through single permitting portals and accelerated timelines, would support deployment in line with the broader RED permitting framework.

Battery storage should be recognised as a core flexibility asset. Enabling distributed battery systems, including commercial and industrial installations, to participate in electricity markets and flexibility services is essential to improving system efficiency and integration.

In practice, participation of smaller-scale assets remains constrained by minimum size thresholds and market access requirements that do not reflect the growing role of distributed energy solutions. Lowering these barriers and facilitating aggregation models will enable a broader range of installations, including commercial and industrial batteries, to contribute to balancing and flexibility services.

Ensuring that regulatory frameworks recognise the value of these assets, and allow them to participate effectively alongside larger conventional assets, will be key to maximising the system benefits of electrification.

Finally, the RED framework should support stable and predictable investment conditions, ensuring compatibility with integrated projects and evolving business models, including third-party financing and service-based delivery.

THE IMPACT

A. COMPETITIVENESS:

A more effective electrification framework will strengthen the competitiveness of European industry by improving access to renewable electricity at predictable prices. Corporate PPAs, in particular, provide a key route for large industrial and commercial consumers to secure long-term price stability and hedge against market volatility. Expanding access to these instruments, while improving system integration and reducing curtailment, will lower overall energy costs and support investment decisions.

B. ENERGY INDEPENDENCE:

Scaling electrification based on domestic renewable electricity reduces reliance on imported fossil fuels. By ensuring that renewable generation can be efficiently integrated and utilised, the EU can maximise the value of its own energy resources and strengthen overall energy security.

C. SYSTEM EFFICIENCY AND RESILIENCE:

Supporting co-located generation and storage improves the flexibility and stability of the energy system, reducing pressure on grid infrastructure and limiting curtailment. A more integrated system ensures that electrification can be deployed where it is most efficient, while maintaining overall system resilience and supporting a balanced transition.

DCC recommends to:

- Recognise PPAs as a key market-based instrument supporting renewable electricity deployment.
- Ensure permitting frameworks explicitly enable co-located renewable generation and storage, including through streamlined procedures and single permitting portals.
- Align support schemes with system integration needs, ensuring compatibility with flexibility and service-based delivery models.

ABOUT DCC PLC

DCC is a customer-focused energy business, specialising in the sales, marketing, and distribution of secure, cleaner, and competitive energy solutions to commercial, industrial, domestic, and transport customers. Headquartered in Dublin, DCC is listed on the London Stock Exchange and is a constituent of the FTSE 100. In FY2025, DCC generated revenues of ~€20 billion and adjusted operating profit of +€700 million.

DCC's European brands include Flogas Ireland, Certa Ireland, Butagaz, Certas Retail France, Wewise, DCC Energi Denmark, Flogas Scandi, Certas Norway, Gaz European, Progas, Benegas, Certas Retail Luxembourg, Certas Retail Europe, FLAGA Austria*, AmeriGas Polska*, FLAGA Hungary*, FLAGA Czechia*, and FLAGA Slovakia*.²⁴

²⁴ Businesses marked with an * were acquired in the past 6 months and are therefore subject to regulatory approval.