

BCG + EUROPE 2025

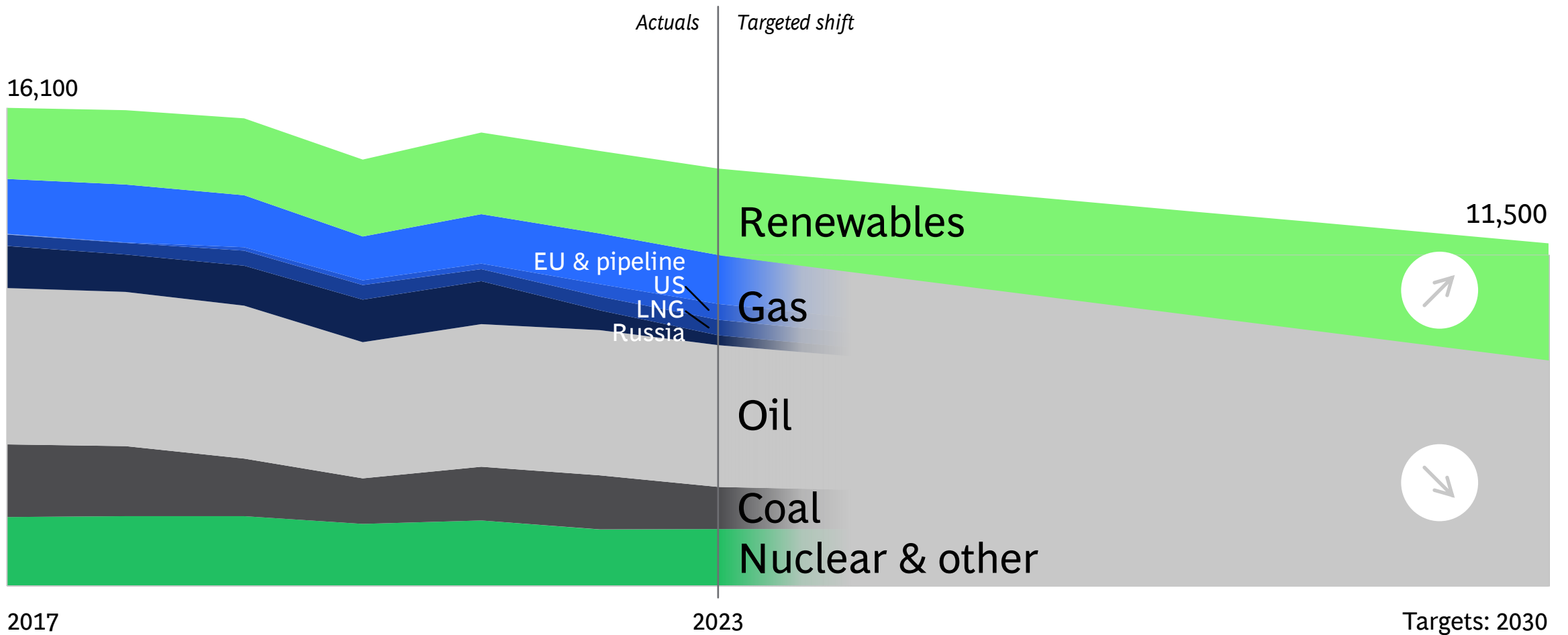
STATE OF THE EUROPEAN ENERGY SUPPLY

Dr. Patrick Herhold

SUSTAINABILITY *& Beyond*

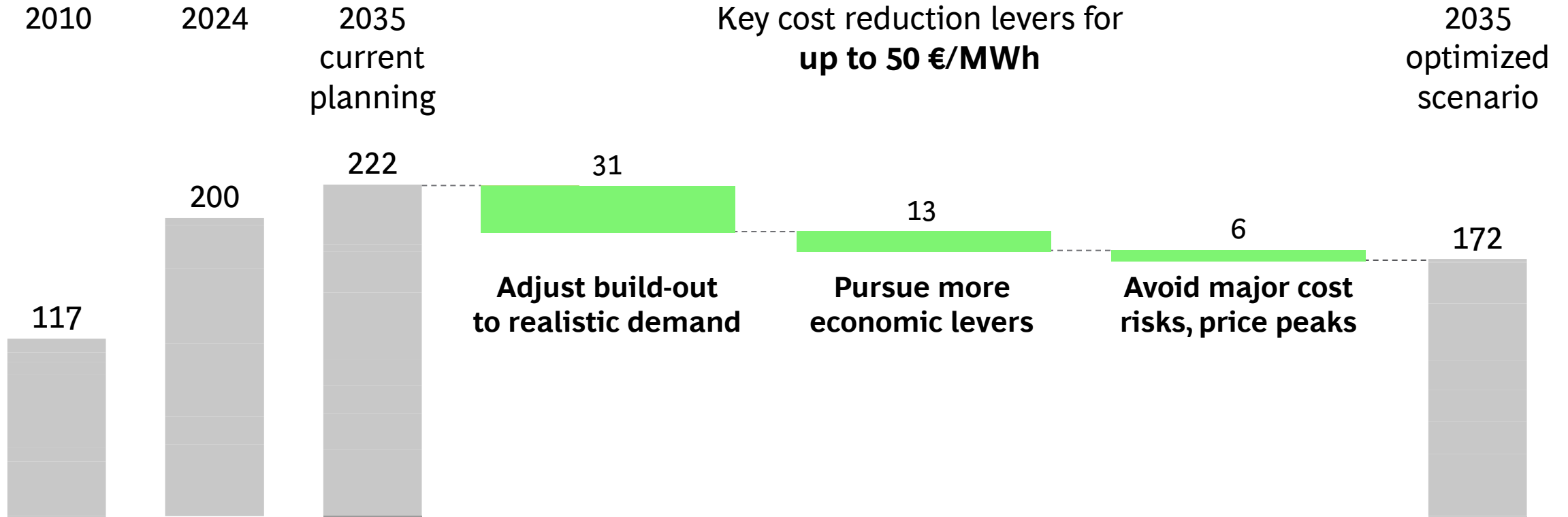


European energy supply has seen strong shifts



Affordability challenges—and some solutions

Specific electricity costs, example Germany
 €/MWh (real 2024)



Source: Getting the energy transition on track (BCG 2025)

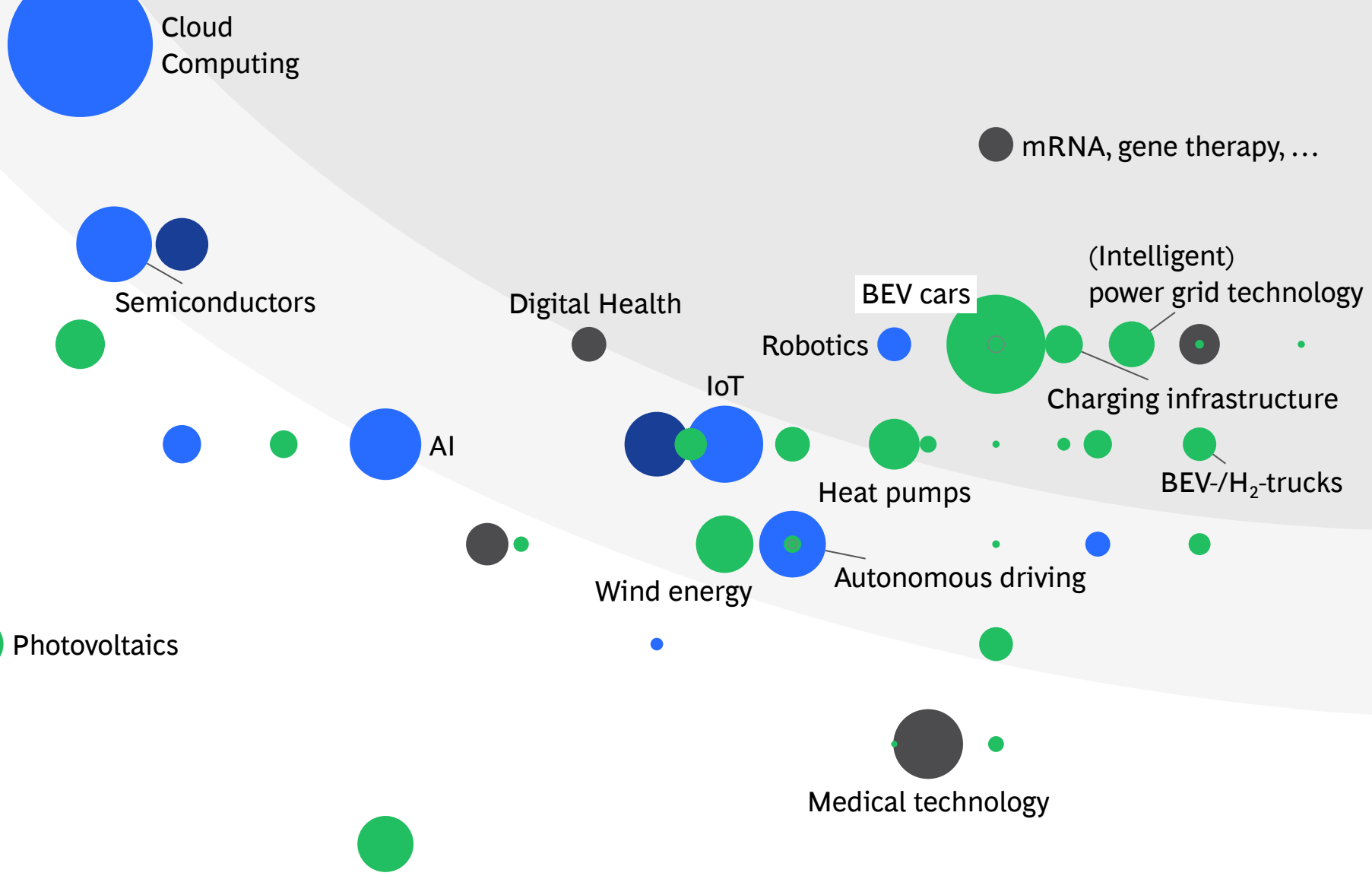
Global market attractiveness

- Energy/climate
- Digitalization
- Defence
- Health

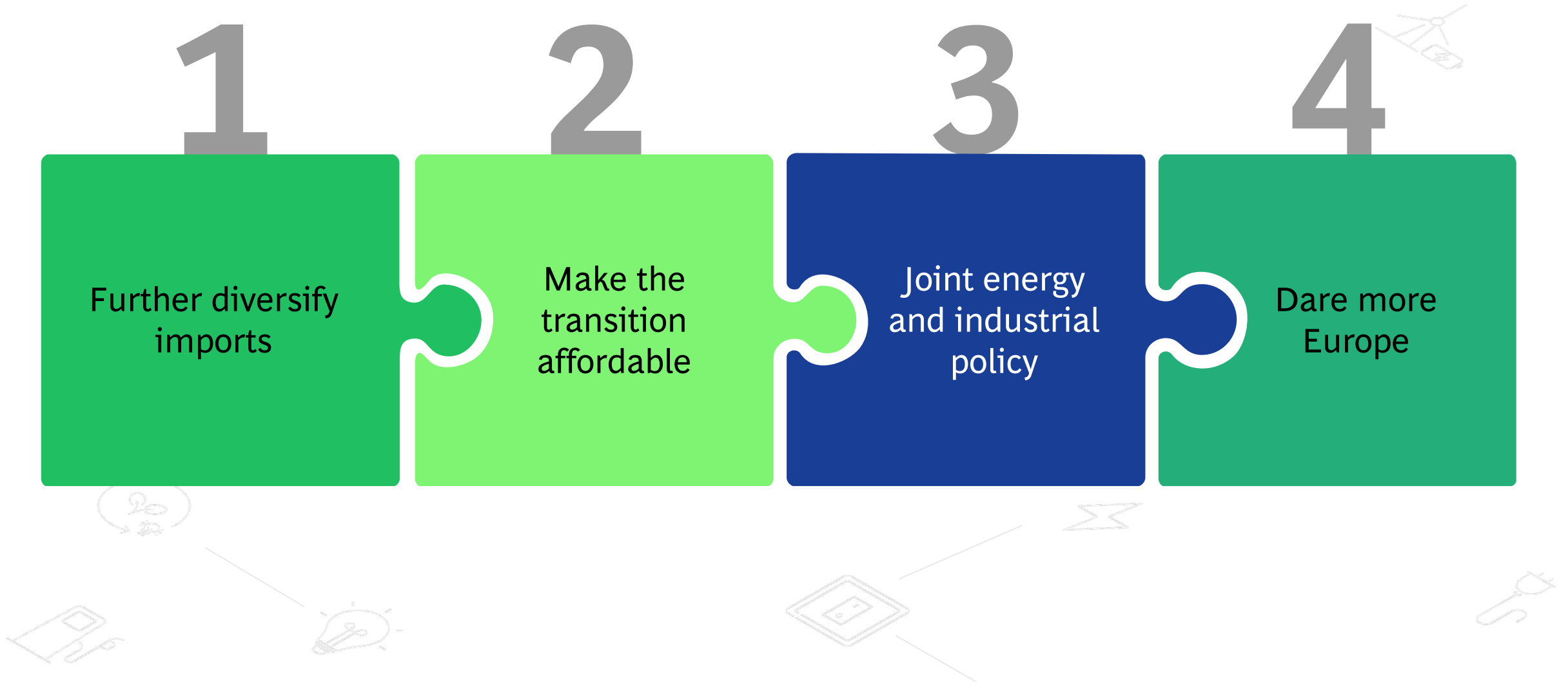
Today's competitiveness (example: Germany)

● Market size in 2030

Note: Illustrative examples for industrial consumers
Source: Transformation Paths (BCG 2024)



Four imperatives for European energy policy



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**THANK
YOU.**

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