Nordic and German Electricity Market Integration

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Perspectives in Context of the German Energiewende

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Recent developments regarding

1. Electricity Market Design

2. The German Power Grid
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1. Electricity Market Design

2. The German Power Grid
Regional Security of Supply

June 8, 2015 Declaration of the 12 electricity neighbours signed

June 8, 2015 Second political declaration of the Pentalateral Energy Forum
Electricity Market Design

October 2014  Green Paper
March 2015  The electricity market: key principles
Single Prize Zone in Germany

Figure 4-4 Maps of bulk power flows related to market integration in Vision 1 (left) and Vision 4 (right)

Source: TYNDP 2014
Recent developments regarding

1. Electricity Market Reform

2. The German Power Grid
Political objectives

1. Further Expansion of Renewables
   - 2025: 40 – 45% (of electricity consumption; 2014: 27.8%)
   - 2035: 55 – 60%
Power Grid Expansion

Political objectives

1. Further Expansion of Renewables
   - 2025: 40 – 45% (of electricity consumption; 2014: 27.8%)
   - 2035: 55 – 60%

2. Nuclear Phase Out by 2022
Power Grid Expansion

Quelle: http://www.vbi.de/uploads/media/2012-05-24_TenneT.PDF
Power Grid Expansion

EnLAG

BBPlG
Power Grid Expansion

EnLAG

BBP1G

SuedLin

Ultranet

South-East Corridor
Power Grid Expansion

Intense local debate and resistance
Recent Milestones

08/14  Underground cable option extended to all HVDC projects
12/14  Start of permitting procedures for important North-South HVDC link (PCI 2.9, Ultranet)
12/14  Start of permitting procedures for important North-South HVDC link (PCI 2.10, SuedLink)
01/15  Completion of permitting procedures and start of construction works for important AC link (PCI 3.13, Thüringer Strombrücke)
01/15  Start of “Bürgerdialog Stromnetz”, an initiative to increase public acceptance for grid expansion
02/15  Final investment decision reached for HVDC link to Norway (PCI 1.8 Nord.Link)
03/15  Draft law to i.a. extend the underground cable option for certain power grid expansion projects
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