

Market initiatives

Synergrid

Global picture

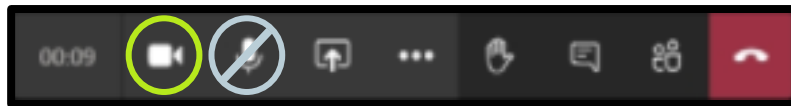


Hybrid meeting rules



Please keep your camera on (to the extent possible)

Please turn off the microphone when you do not want to intervene



Questions:

- Post your questions in the chat (with slide number if applicable)
- Interactions are foreseen

Agenda

- Context
- Market initiatives Synergrid : global picture
 - Shared Ambition's TSO-DSOs
 - Global Action Plan Incompressibility
 - Roadmap Explicit Flex : Game Plan Transfer of Energy
- Management summary

Context

- Synergrid organizes joint market consultations on specific topics via "PDG - Product Design Groups" on behalf of and for its members
- Market players have expressed their wish to have a global view ("Global picture") on market initiatives within Synergrid

Shared Ambitions DSO's - Elia



General approach Synergrid market initiatives

Challenges

- What are the top challenges for the TSO/DSO's in the years to come ?

Needs

- What is needed to answer these common challenges ?

Gaps

- What are the missing pieces in terms of market design/processes systems /information flows ? What are the Gaps ?
- What are the market mechanisms already put in place to answer these needs ? How to bring more volume in these existing mechanisms ?

Priorities

- What are the top priority topics on which ELIA and the DSOs need to collaborate together ? → **Shared Ambitions**

Main challenges faced by TSO/DSO

Adequacy / Incompressibility

Winter: enough supply for peak demand (CRM) ?
Summer: too much electricity for low demand?



Balancing

Be able to balance the system at all time ...
in a world of more and more decentralised
and intermittent generation



Congestion

Avoid overloading of transmission &
distribution lines



Value for consumers

Facilitate new services that brings value for
consumers but also suppliers, FSP,.....

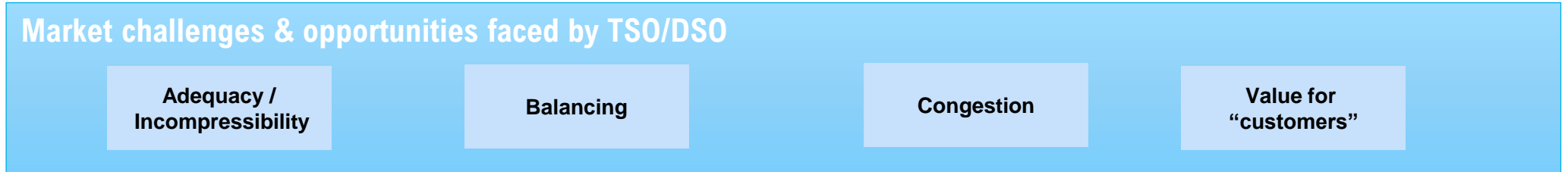


Additional Flexibility Needs (2032)

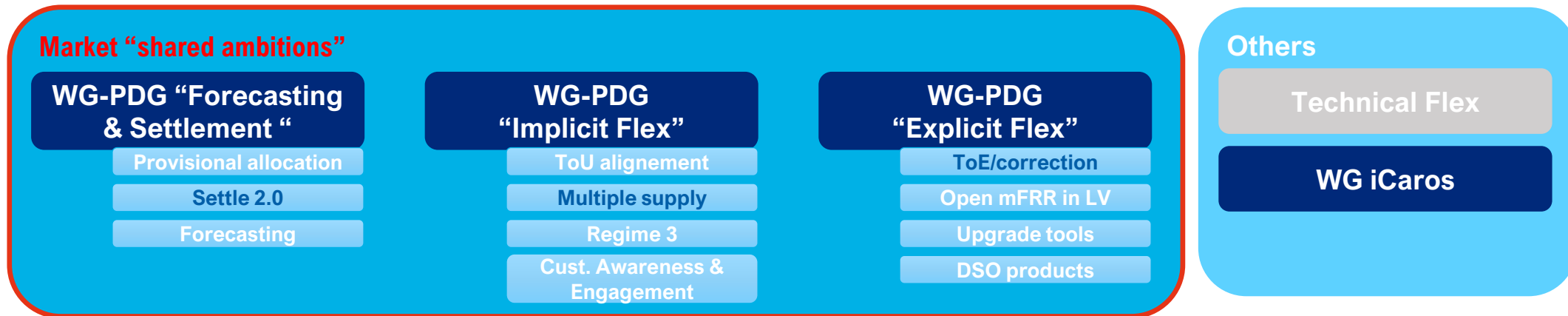
Same Flex Volume can
contribute to multiple
purposes if well
coordinated

Market Shared Ambitions

Challenges & selected solutions



Developing the solutions



Enablers/Supporting « Devices »



Market Shared Ambition's

Forecasting & Settlement

- Ensure a well-functioning electricity market allowing BRPs and market actors to better forecast and balance their portfolio in all conditions
- Key components: provisional allocation, future-proof settlement process, ex-ante and close to real-time data

Implicit Flex

- Ensure a well-functioning electricity market leveraging flexibility at scale
- Key components: : ToU implementation, access to digital meter with regime 3 to all customer segments in all regions, multiple supply/contract

Explicit Flex

- Ensure the right flexibility mechanisms can be mobilized at scale by SOs to ensure a safe operation of the system
- Key components: ELIA products opened at all voltage levels, Development of Congestion products also at DSO level, Remove barrier to participation incl. Appropriate Correction Mechanisms

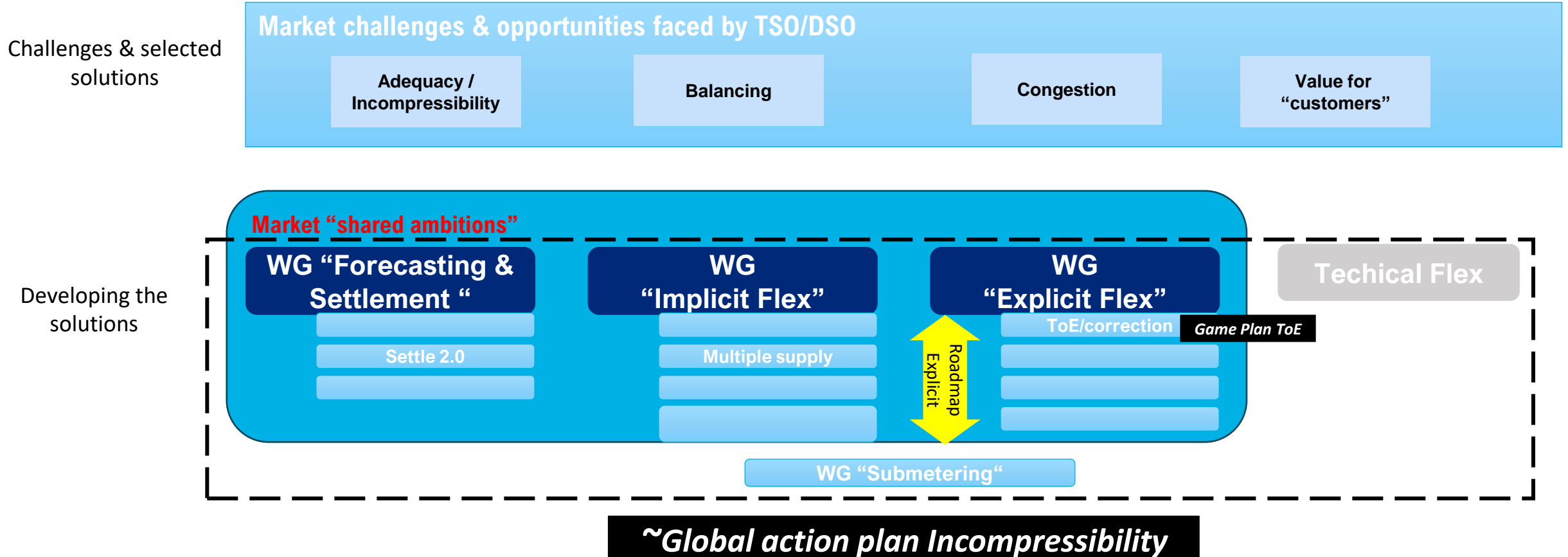
Technical Flex

- Guarantee the system safety by ensuring that the right technical flex mechanisms are available and can be activated as last resort option

Global Action Plan Incompressibility 2025-2027



Global action Plan Incompressibility





Mapping and first prioritisation – Consolidated action plan 2025

2024

2025

2026

2027

- Interactions with regulators
- Identify barriers for implicit participation on MV level
- Fix Game Plan ToE

EXPL: CONNECT TO EU and OPEN IN MV AND LV
IMPL: CREATE AWARENESS IN LV & BRING MV FLEX VOLUMES ON THE MARKET

Market Monitoring & Awareness

Market Measures

Development driven based on Market Parties interaction & Market Monitoring

Technical Measures (Telecontrolled)

Intra-Day Market

WG Grid

ID Capacity Calculations in line with DA Security Analysis

ID Capacity Calculations Study on Improvements

Analysis flow-based allocation ID market

Implicit

Imbalance price signal
Real Time Price – design & regulatory framework

WG ES

With DSOs

Supply Split
Ambitionned shared target model Supply Split
(Starting Point: Position Paper MV/LV 2022)

WG DSO

Supply Split per region (cfr regional Roadmap)

EVLIA

WG ES

With DSOs & BRP

Customer involvement & trust

Price Sensitivity
SMR3 BXL & WAL
Contract Split behind the meter MV/LV

Big Switch

WG ES

Explicit

Coupling to MARI and PICASSO

WG ES

Start analysis on possible downward procurement FRR

WG ES

Start analysis BSP Bidding Obligation for units 1MW-25MW

WG ES

- ToE-alternative for HV



With DSOs

- ToE aFRR HV/MV (*) & mFRR HV/MV
- POC ToE for aFRR in LV
- ToE for mFRR on LV Head Meter (Q4/25-Q1/26)



(*) Conditionned by assumptions on R&R 4"-values

PDG Synergid

Improve robustness of the technical solutions

WG ES

- Formalization of the agreements with DSOs for the years to come (via SOK)
- Consultation LFC BOA, T&C BRP and SoK foreseen December 2024



Mapping and first prioritisation – Consolidated action plan 2026

2024

2025

2026

2027

EXPL: FINISH OPENING ALL VOLTAGE LEVELS AND PREPARE MEASURES IN CASE OF MARKET UNDERDELIVERY
IMPL: GO LIVE REAL TIME PRICE

Market Monitoring & Awareness

Market Measures

Development driven based on Market Parties interaction & Market Monitoring

Technical Measures (Telecontrolled)

Intra-Day Market

WG Grid

ID Capacity Calculations
Study on Improvements -
Implementation

Analysis flow-based
allocation ID market

Implicit

Imbalance price signal
Real Time Price – Implementation

WG ES

With DSOs & BRP

Supply Split per region
(cfr regional Roadmap)

WG DSO

Customer
involvement &
trust

Further needs?

Wal: ToU

Flanders: QH
measurements
in allocations

Explicit

Start discussion on design
downward procurement FRR

WG ES

With DSOs

Start discussion BSP Bidding
Obligation for units 1MW-25MW

- ToE for aFRR in LV
- Allow Semi-Regulated Meter
for mFRR on LV

PDG
Synergid

PDG
Synergid

Keep improving the
robustness of the technical
solutions

- Applicability (if and when
needed) of the technical
measures as agreed in the
contractual framework

Agree on Shared Ambition (incl Action Plan) 2027 - 2030 based on Market Evaluation

Mapping and first prioritisation – Consolidated action plan 2027



Market Monitoring & Awareness

Market Measures

Development driven based on Market Parties interaction & Market Monitoring

Technical Measures (Telecontrolled)

Intra-Day Market

WG Grid

ID Capacity Calculations
Study on Improvements -
Implementation

Analysis flow-based
allocation ID market

Implicit

Imbalance price signal
Real Time Price – Operational

WG ES

With DSOs & BRP

Supply Split per region
(cfr regional Roadmap)

WG DSO

Customer
involvement
& trust

Explicit

WG ES

Subject to analysis –
Possible Implementation of
BSP Bidding Obligation for
units 1MW-25MW or
downwards FRR –
To be assessed with Icaros
phase 2 **if and only if the
market does not deliver**

With DSOs

Improve robustness of the technical solutions

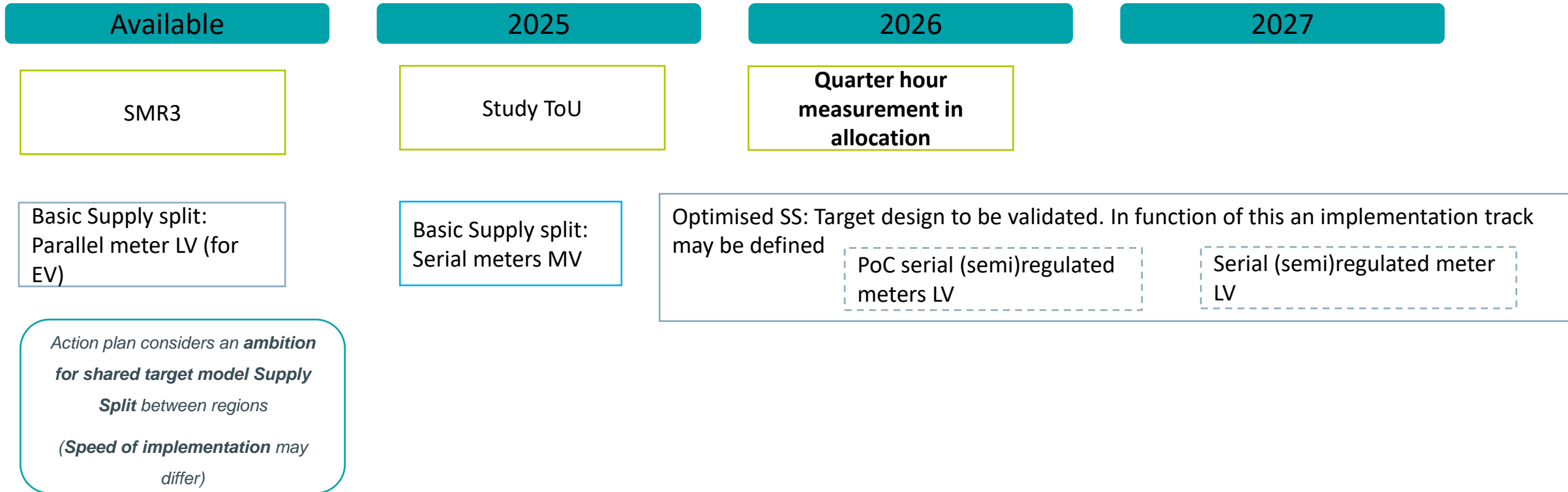
- Applicability (if and when needed) of the technical measures as agreed in the SOK

For information

Plan serves as insight on what's to come, however realization remains highly dependent on:

- Regulatory framework (EU, BE, regional)
- Market needs and evolutions

Action plan implicit flexibility: Flanders



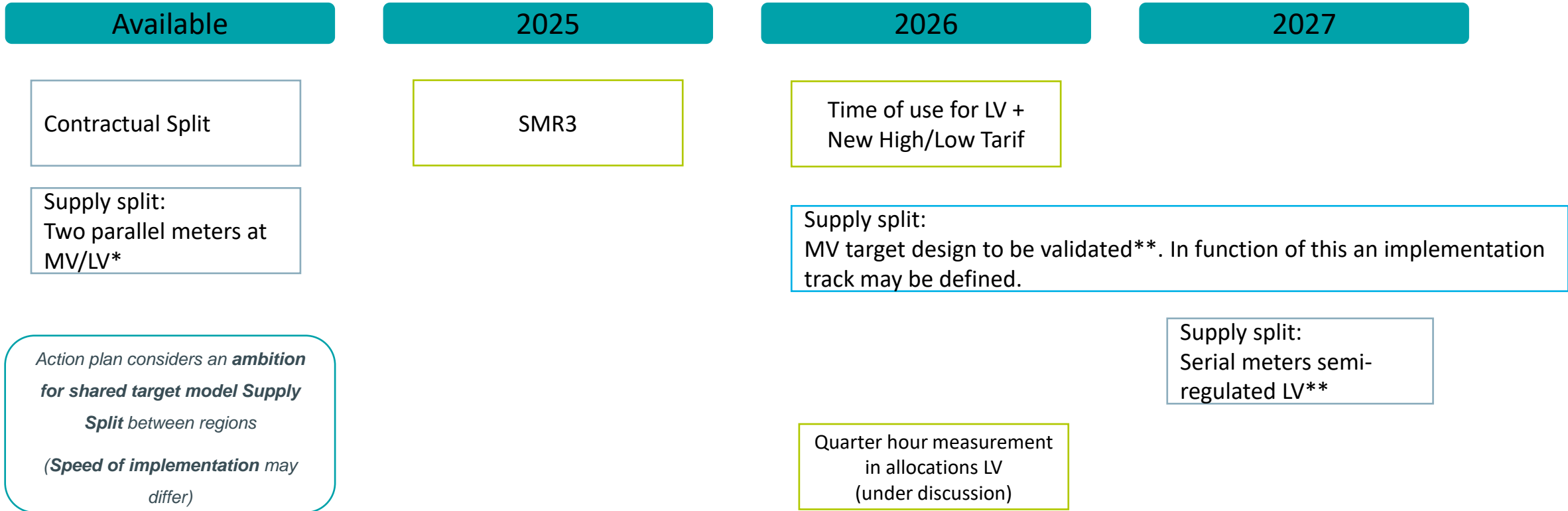
Ambitioned evolutions which have a positive effect on the development of implicit flexibility

For information

Action plan implicit flexibility: Wallonia

Plan serves as insight on what's to come, however realization remains highly dependent on:

- Regulatory framework (EU, BE, regional)
- Market needs and evolutions



Ambitioned evolutions which may have a positive effect on the development of implicit flexibility

For information

Action plan implicit flexibility: Brussels

Plan serves as insight on what's to come, however realization remains highly dependent on:

- Regulatory framework (EU, BE, regional)
- Market needs and evolutions

Available

2025

2026

2027

Supply split:
Two parallel meters at LV

Contract split
Serial regulated meters (AMR) at MV*

SMR3

Supply split:
Target design to be validated. In function of this an implementation track may be defined.

Action plan considers an **ambition for shared target model Supply Split** between regions
(Speed of implementation may differ)

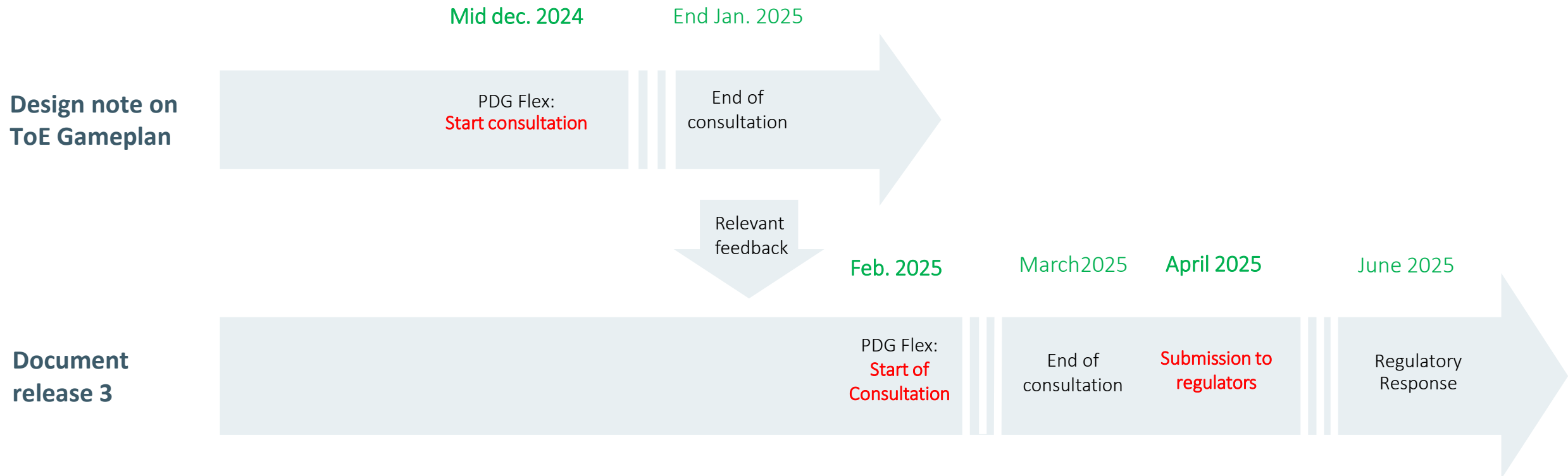
Ambitioned evolutions which may have a positive effect on the development of implicit flexibility

Roadmap Explicit Flex

Game Plan ToE 25-27



Indicative timeline Consultation Game Plan ToE + Consultation/validation Doc. release 3



ToE Rules (T&C BRP, T&C aFRR)

Game Plan ToE 25-27

- Based on recommendations Vito Study
- Contains different prerequisites & dependencies
- Is a logical sequence of activities/actions by use of decision points at start of activities/POCs
- Rational behind design/game plan

Proposed Scope Doc Rel 3

- ToE Game plan
- CRM Auction Y-2
- Opening mFRR LV
- Process Activation register
- Process improvements
- Remarks regulators Doc Rel 2

Key take-aways



Key take-aways

- The members of Synergrid identified some **shared ambitions** to tackle **common challenges** and created a **global Action plan**, which can leverage the existing regional/federal actions and plans.
- The Global Action Plan aims to tackle the Incompressibility issue for the period 2025-2027 with market measures and technical measures
- SO's finalized as part of the Roadmap Explicit Flex a **Game Plan ToE** : a vision note will be consulted before end of this year and be translated in Doc. Release 3 (Q1 2025)
- As market facilitators, SO's will continue their intensive dialog a.o. with suppliers, flexibility service providers and other market parties on the different themes.
- Different actions will also require clear and where relevant aligned guidelines from regulators and/or governments in order to remove/lower barriers or to comply to the Electricity Market Design Reform or updated Network Code Demand Response.