

Outlook for the Future Energy System – General Overview

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How to see the future?

- ✓ Starting point
 - ✓ IKEM's method as a think tank and research institute
 - ✓ Interpreting trends in political and scientific fields
- ✓ By topics
 - ✓ Energy production
 - ✓ Energy market
 - ✓ System responsibility

Renewables only?

- ✓ High funding rate for renewable energy production all over Europe (but also nuclear)
- ✓ Political discussion
 - ✓ Coal phase-out (carbon pricing, legal obligations and bans, funding programmes for coal-intensive regions)
 - ✓ Increase in renewable Energy demand (EU, import)
 - ✓ New generation of nuclear power plants
 - ✓ Import of gas (pipelines and LNG)

Centralised or decentralised systems?

- ✓ Trends in both directions
 - ✓ Decentralised:
self-consumers, energy communities, microgrids, DSO
 - ✓ Centralised:
Energy Union, 15% interconnection target, TSO
 - ✓ Market-related aspects:
blockchain vs. Guarantees of Origin

Centralised or decentralised systems?

- ✓ Strength of decentralisation
 - ✓ Less infrastructure, implementation of integrated energy systems
- ✓ Strength of centralisation
 - ✓ Resilience, common market
- ✓ Discussion in both cases
 - ✓ Sector unbundling is questioned
 - ✓ New models for financing gas, heat, and electricity infrastructure are needed

How quickly does the Energy Union move forward?

- ✓ Clear decision on the use of existing infrastructure
- ✓ Central EU regulatory authority with more ambitious competences (ACER+) for an integrated energy market across sectors
- ✓ The two trends of greater (EU) integration and greater decentralisation leading to a less nation-state-oriented energy policy
- ✓ Europe-wide strategy for RES



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