



# Nordic Electricity Market Forum Online Session 2 2021

# 2030 Vision for the Nordic Electricity Market

## Core Purpose

To provide secure, affordable and sustainable electricity to the Nordic society, through competitive markets

## Core Values

Productive and trust-based cooperation across the Nordic countries and between stakeholder groups

Reliable and cost-efficient electricity supply

Transparent and market-based solutions

Constant improvements to low-carbon solutions, a driving force behind innovation and leading the way.

Emphasis on consumer-oriented solutions

## 2030 Goal

In 2030, the Nordics have the world's most competitive, innovative, and consumer-oriented electricity market, that contributes to reaching the ambitious Nordic climate goals.

## The Nordic Electricity Market in 2030

A society characterised by digitalisation, automatization and electrification is backed by a highly reliable electricity supply

The electricity market brings increasing benefits to the society as it enables consumers and new market players to contribute to the energy transition with innovative solutions.

The grid infrastructure is smartly operated, cost-efficient, robust and without undue constraints, being optimised from a regional perspective

The Nordic electricity market is a positive driving force in the European electricity market integration, market development and in the effort towards reaching ambitious climate goals



*In 2030, the Nordics have the world's most competitive, innovative and consumer-oriented electricity market, that contribute to reaching the ambitious Nordic climate goals.*





# Purpose of the online forum sessions 2021

## *Main theme: Future Flexibility Needs*

- **Strengthen** our commitment to the vision for the Nordic Electricity Market 2030 and enable common understanding of progress made, our different roles and the way forward.
- **Inspire** further Nordic stakeholder dialogue and action contributing to moving towards the vision for the Nordic Electricity Market.
- **Explore and mobilise** around key topics and focus areas from the roadmap relevant for achieving the vision.





# Forum process

**Session 1**  
February 4,  
CET 09.00-12.00

**- We learn, become  
inspired and engage in  
cross-stakeholder  
dialogue**

**Alignment and  
dialogue within  
stakeholder  
organizations**

Input from session 1 and  
from stakeholder dialogues  
will form and influence the  
agenda for online session  
part 2.

**Session 2**  
March 19  
09.00-12.00 CET

**- We mobilize,  
conclude and plan for  
action**



# Program Nordic Electricity Market Forum Session 2

**09.00 Welcome and Introduction**  
Electricity Market Group chair Tatu Pahkala and forum moderator Julia Karner, Odd Agency

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## **PART 1)**

**09.15 Input and conclusions on future flexibility needs**  
Sharing how input received has been processed and key conclusions it has resulted in

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## **PART 2)**

**09.35 Towards the vision for the Nordic Electricity Market 2030**  
Presentation of updated roadmap towards the vision for the Nordic Electricity Market 2030

**10.05 Break**

**10.15 Breakout session**  
Reflection and discussion on updated roadmap focusing

**11.00 Break**

**11.10 Learning from each other**  
We share and review the output from group dialogues

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## **PART 3**

**11.40 Idea gathering: themes for next forum**  
A interactive and quick session to gather ideas for themes for future forums

**11.50 Concluding the forum – sharing of next steps**  
Electricity Market Group chair Tatu Pahkala and forum moderator

**12.00 End**





# Part 1) Input and conclusions on Future Flexibility Needs

# 2030 Vision for the Nordic Electricity Market

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# Key Element: Flexibility

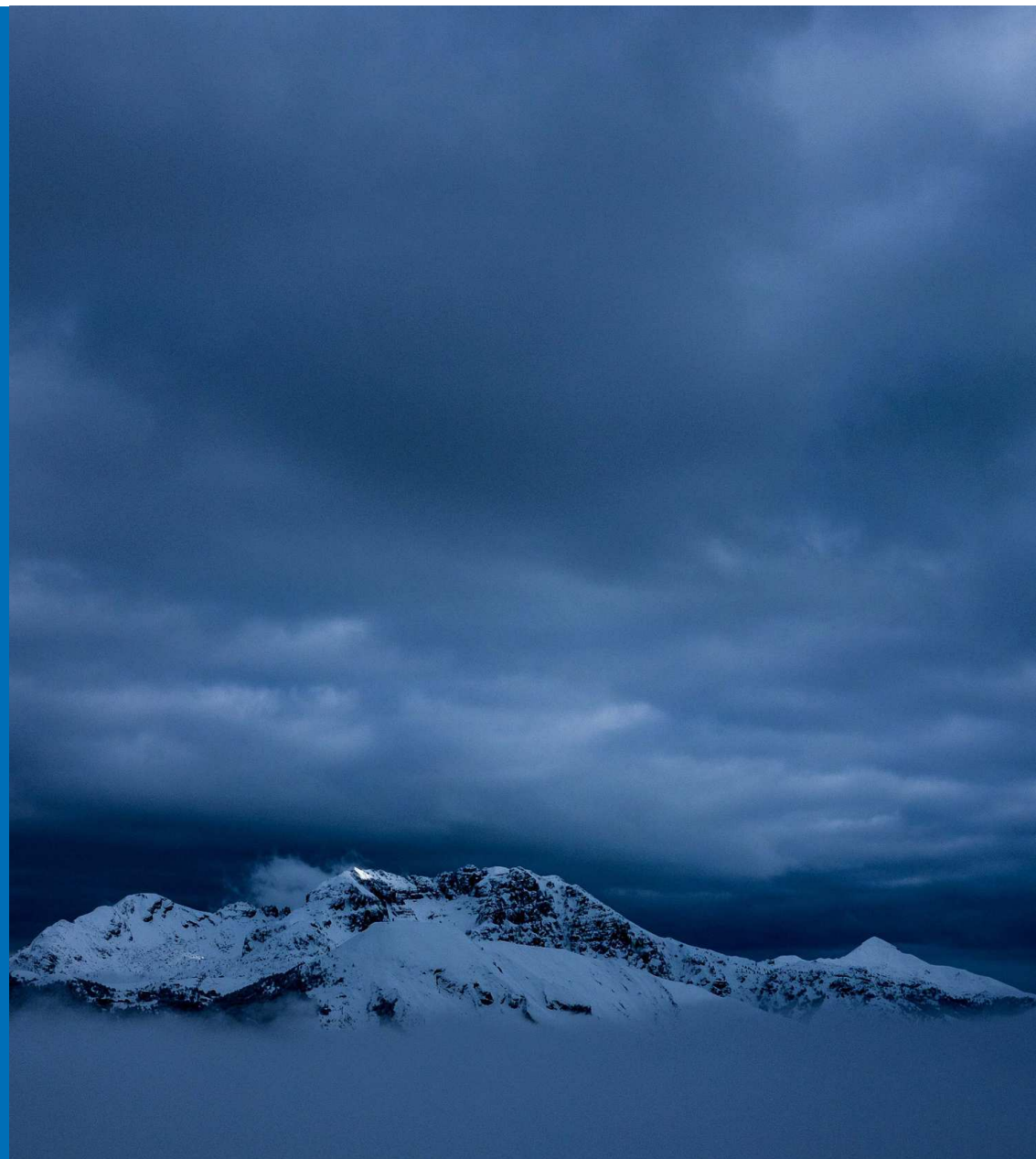


Nordic Council  
of Ministers



# Overview of stakeholder input

- **Questions in two areas:**
  - On the theme of Future Flexibility Needs
  - On working towards the vision for the Nordic Electricity Market 2030
- **10 written answers**
  - 1 Nordic TSO answer,
  - 1 industry answer, 1 district heating answer, 1 PX answer and
  - 6 answers from the production side



# Processing your input



## ROADMAP FOR REACHING THE 2030 NORDIC ELECTRICITY MARKET VISION

- Updated long term objectives
- Updated immediate and short term action points





## Examples of input on the theme of Future Flexibility Needs:

### From your point of view, what are the main obstacles to bring existing flexibility into the system?

“As long as CAPEX-based costs are more attractive to system operators in terms of cost recovery than OPEX-based costs, they will always prefer to invest in hardware compared to software.” (EPEX)

“Reliability of flexible load is variable” (Energy Norway)

“This implies especially the TSOs, and we regret to see still, for example, different prequalification processes, sometimes unnecessarily burdensome for smaller flexibility providers.” (Finnish Energy Industries)

“By not compensating fully for ancillary services critical resources such as nuclear and hydro go offline and thus increases the need for other flexibility resources to come online.” (Fortum)

“Serving the power market is not the core business and focus of the end-use industry.” (Norsk Hydro)

“The TSOs main identified obstacle is to find the right market signals to trigger the realisation of flexibility in the pace the power system needs it.” (Nordic TSOs)



## Examples of input on the theme of Future Flexibility Needs:

### What do you propose to be done on the national and Nordic level to address these obstacles?

“Knowledge on demands as early as possible is important in order to affect investment decisions in heat producing technologies that supports the electricity system in different ways.” (Danish District Heating)

“Nordic workshop for DSOs for the exchange of experience and best practice” (Energy Norway)

“We see a necessity for securing market based remuneration for the services production resources provide for the system, which of course should be done from a Nordic perspective” (Svensk Energi”)

“With correct price signals the need for new and more expensive flexibility resources to come online can be prevented and existing resources can be used instead. It is therefore important that Nordic TSO adequately remunerate both frequency and non-frequency related ancillary services.” (Fortum)

“Consider and distinguish the ability of different flexibility products - a distinction is made between their ability to provide flexibility at system level (frequency) and distribution network level (voltage, power, etc. Perhaps every substation / conversion circuit, etc. accuracy) - assess the framework conditions for making it economically viable - especially in a cost-effective way for society.” (Flexens)



Examples of input on working towards the vision for the Nordic Electricity Market 2030:

**Which areas from the roadmap besides flexibility would you like to address on the Nordic level? Is an area missing to reach the vision? ?**

“ Flexibility should be recognized as an option that cannot stand alone neither on TSO-, nor on DSO-level. Instead, it should be seen as a means to a more cost-efficient grid reinforcement strategy.” Dansk Energi

“One current topic is the necessity of a large-scale electrification to achieve ambitious climate targets, and Nordenergi is currently about to finalize a study on opportunities and barriers to electrification in the Nordic region.” (Svensk Energi)

“A coordinated Nordic transmission grid development plan is essential in terms of reaching the vision.” (Finnish Energy Industries)

“It is becoming increasingly clear that scarcity pricing alone cannot guide new investments if the surrounding investment climate is unsupportive.” (Fortum)

“We believe there needs to be some degree of harmonization and better co-operation in the Nordic climate and energy policies, if we aim for the electricity market to drive the investments.” (Fortum)

“The topics in the upcoming TSO-strategy: Market based integration of both offshore and onshore wind and sector integration” (Nordic TSOs)





# Conclusions

Very good strategic input concerning the flexibility perspectives used to update the objectives

- Concrete actions to be discussed in the breakout session

A lot of concrete actions on the perspective of “local flexibility”

- Proposal: new mandate for flexibility group (and a new recruitment of members to the group)
- Examples of themes for the flexibility group:
  - Local flexibility markets
  - Regulatory barriers for new flex providers
  - Prequalification criteria for flex providers
  - Exchange best practices



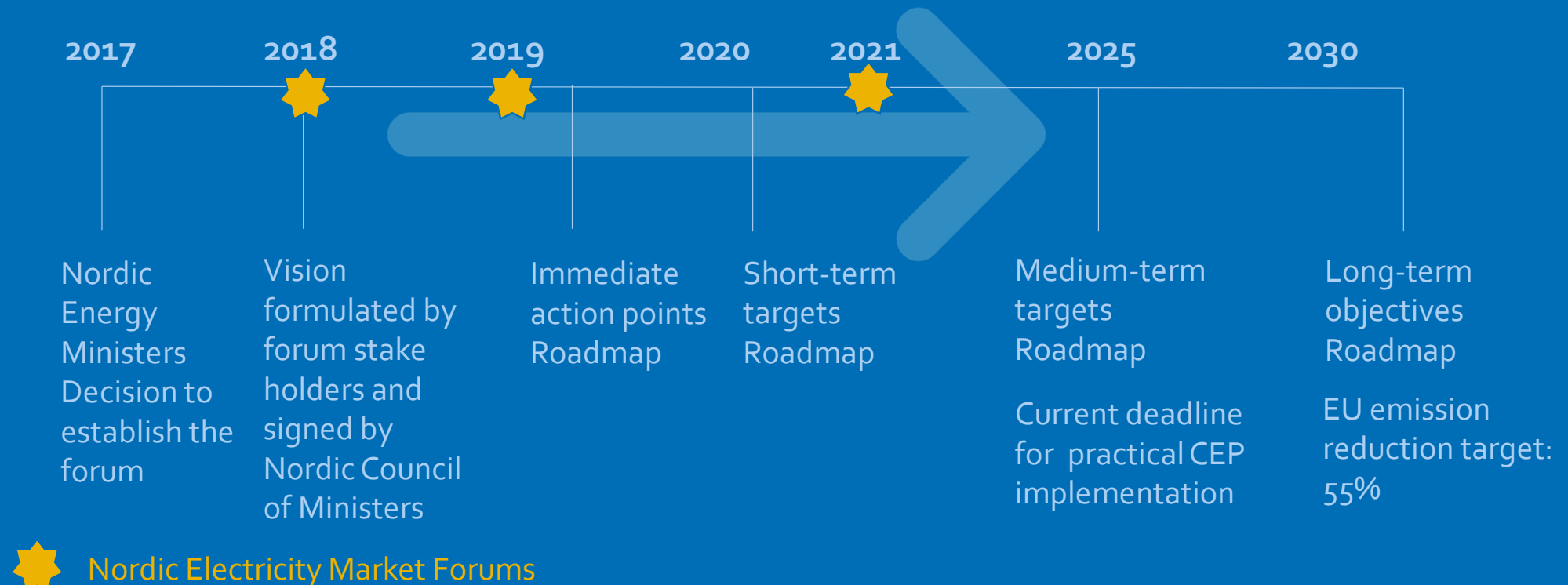


# Part 2) Towards the vision for the Nordic Electricity Market 2030

## Presentation of updated roadmap



# Roadmap for reaching the 2030 Nordic Electricity Market Vision



# An updated structure...

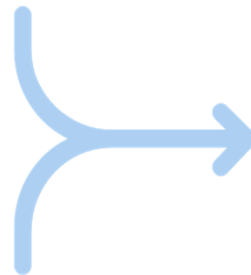
## *Former roadmap structure*

- 2030 Objectives  
6 objectives
- 2025 Medium Term Targets
- 2020 Short Term Targets
- Immediate and further action points



## *New roadmap structure*

- 2030 Objectives  
6 objectives, 2 of them new
- Action points addressed to  
EMG, NordREG and Nordic  
TSOs



# ...and updated objectives

## 1. Flexibility to the markets

All flexible assets from producers, consumers and service providers can efficiently contribute to reliable and competitive functioning of the power system.

## 2. Clear price signals

Clear price signals for all system needs across all time frames, price areas and voltage levels (TSO/DSO), rewarding flexibility and system support were effective.

## 3. Enabling electrification

New sectors (transport, heating & cooling and industry (power to X)) are electrified and integrated into the electricity markets with their flexibility. Electricity markets enable system integration and support the move towards a cleaner Nordic society.

## 4. Nordic grid development

Welfare on a Nordic level is the guiding objective when preparing Nordic grid development plans considering large scale RES developments on- and offshore and designing Nordic bidding zone structures.

## 5. Open Market Access

All clean electricity sources (e.g. offshore energy) are seamlessly integrated into the Nordic market.

## 6. Resource Adequacy

Resource adequacy is ensured through market-based solutions. Price signals guide investments, reflecting the value of resources in scarcity periods, and internalize the risk of inadequacy.





# Objective 1: Flexibility to the markets

All flexible assets from producers, consumers and service providers can efficiently contribute to reliable and competitive functioning of the power system.

## IMMEDIATE AND FURTHER ACTION POINTS FOR THE ELECTRICITY MARKETS

EMG	NordREG	NordicTSOs
<ul style="list-style-type: none"><li>• 3 suggestions for action points currently</li><li>• <b>From stakeholders:</b><ul style="list-style-type: none"><li>• Develop the flexibility working group under the NEMF Coordination group with a new mandate (local flexibility)</li></ul></li><li>• <b>From previous roadmap:</b><ul style="list-style-type: none"><li>• coordinate on the CEP implementation, e.g. regarding aggregators and the upcoming demand flexibility guideline</li></ul></li></ul>	<ul style="list-style-type: none"><li>• 3 suggestions for action points currently</li><li>• <b>From stakeholders:</b><ul style="list-style-type: none"><li>• Enable DSOs in the regulatory model to use flexibility as an alternative for network investments.</li></ul></li><li>• <b>From previous roadmap:</b><ul style="list-style-type: none"><li>• Coordinate CEP implementation, e.g. regarding aggregators and the upcoming demand flexibility guideline</li></ul></li></ul>	<ul style="list-style-type: none"><li>• 6 suggestions for action points currently</li><li>• <b>From stakeholders:</b><ul style="list-style-type: none"><li>• Where possible, harmonize prequalification rules for flexibility providers to make it easier to be active in several markets</li></ul></li><li>• <b>From previous roadmap:</b><ul style="list-style-type: none"><li>• Regular assessment and publication of flexibility needs according to common Nordic and European principles to provide visibility for the market participants (also objective 2)</li></ul></li></ul>



## Objective 2: Clear price signals

Clear price signals for all system needs across all time frames, price areas and voltage levels (TSO/DSO), rewarding flexibility and system support were effective.

### IMMEDIATE AND FURTHER ACTION POINTS FOR THE ELECTRICITY MARKETS

EMG	NordREG	NordicTSOs
<ul style="list-style-type: none"><li>• 1 suggested action point currently</li><li>• <b>From previous roadmap:</b><ul style="list-style-type: none"><li>• Coordinate on guideline revision (CACM) and CEP implementation</li></ul></li></ul>	<ul style="list-style-type: none"><li>• 2 suggested action points</li><li>• <b>From stakeholders:</b><ul style="list-style-type: none"><li>• Every time there is a regional decision under the third package and the CEP, establish a coordination process to facilitate reaching a unanimous approval within the given times. Establish to this end all the necessary exchanges with the relevant TSOs and NEMOs.</li></ul></li><li>• <b>From previous roadmap:</b><ul style="list-style-type: none"><li>• Coordinate viewpoints on the revision of network codes and guidelines</li></ul></li></ul>	<ul style="list-style-type: none"><li>• 8 suggested action points</li><li>• <b>Example from stakeholders:</b><ul style="list-style-type: none"><li>• Creation of markets for ancillary – and system services to create price signals</li><li>• :Increased transparency on (close to) real-time system operation and prices and reporting on major incidents to the markets</li></ul></li><li>• <b>From previous roadmap:</b><ul style="list-style-type: none"><li>• Regular assessment of flexibility needs according to common Nordic and European principles to provide visibility for the market participants. (also under objective 1)</li></ul></li></ul>



## Objective 3: Enabling electrification

New sectors (transport, heating & cooling and industry (power to X)) are electrified and integrated into the electricity markets with their flexibility. Electricity markets enable system integration and support the move towards a cleaner Nordic society.

### IMMEDIATE AND FURTHER ACTION POINTS FOR THE ELECTRICITY MARKETS

EMG	NordREG	NordicTSOs
<ul style="list-style-type: none"><li>No suggested action points currently</li></ul>	<ul style="list-style-type: none"><li>3 new suggested action points by stakeholders</li><li><b>Example from stakeholders:</b><ul style="list-style-type: none"><li>Assess regulatory barriers giving negative incentives for flexibility, taking into account new flexibility providers (e.g. district heating, industry) (also in objective 1)</li></ul></li></ul>	<ul style="list-style-type: none"><li>2 new suggested action points by stakeholders</li><li><b>Example from stakeholders:</b><ul style="list-style-type: none"><li>Continue working on the Nordic TSOs strategy on sector integration (which is expected for stakeholder consultation before summer 2021)</li></ul></li></ul>





## Objective 4: Nordic grid development

Welfare on a Nordic level is the guiding objective when preparing Nordic grid development plans considering large scale RES developments on- and offshore and designing Nordic bidding zone structures.

### IMMEDIATE AND FURTHER ACTION POINTS FOR THE ELECTRICITY MARKETS

EMG	NordREG	NordicTSOs
<ul style="list-style-type: none"><li>• 1 action point</li><li>• <b>Updated from previous roadmap:</b><ul style="list-style-type: none"><li>• Support coordination on TEN-E revisions</li></ul></li></ul>	<ul style="list-style-type: none"><li>• No action points currently suggested</li></ul>	<ul style="list-style-type: none"><li>• 4 action points, 3 from previous roadmap</li><li>• <b>From stakeholders:</b><ul style="list-style-type: none"><li>• Enhance the use of the PCI framework</li></ul></li><li>• <b>From the previous roadmap:</b><ul style="list-style-type: none"><li>• Develop a method for cost-benefit assessment if grid projects are clearly beneficial from a Nordic point of view but less from a national point of view</li></ul></li></ul>



## Objective 5: Open market access

All clean electricity sources (e.g. offshore energy) are seamlessly integrated into the Nordic market.

### IMMEDIATE AND FURTHER ACTION POINTS FOR THE ELECTRICITY MARKETS

EMG	NordREG	NordicTSOs
<ul style="list-style-type: none"><li>• 1 action point</li><li>• <b>Updated from previous roadmap:</b><ul style="list-style-type: none"><li>• Contribute to coordination on TEN-E revision regarding offshore market design</li></ul></li></ul>	<ul style="list-style-type: none"><li>• No action points currently suggested</li></ul>	<ul style="list-style-type: none"><li>• 3 action points</li><li>• <b>From stakeholders:</b><ul style="list-style-type: none"><li>• coordination and exchange of views with stakeholders on issues related to financing and ownership to offshore infrastructure.</li></ul></li><li>• <b>Updated from the roadmap:</b><ul style="list-style-type: none"><li>• Designing and implementing a Nordic transmission grid development plan to integrate the expansion in RES production (also under a coordinated Nordic Grid Development)</li></ul></li></ul>



## Objective 6: Resource Adequacy

Resource adequacy is ensured through market-based solutions. Price signals guide investments, reflecting the value of resources in scarcity periods, and internalize the risk of inadequacy.

### IMMEDIATE AND FURTHER ACTION POINTS FOR THE ELECTRICITY MARKETS

#### EMG

- 1 action point:
- **From stakeholders:**  
Coordinate the policy work regarding “security of supply”

#### NordREG

- No action point currently suggested

#### NordicTSOs

- 2 action points
- **From stakeholders:**
  - Coordination of possible measures to ensure resource adequacy
- **From the previous roadmap:**
  - Regional analysis of resource adequacy





# Breakout session - updated roadmap



# Purpose of breakout session

- Review current and suggest new action points related to the updated objectives.
- In different groups, we ask you to focus on action points related one of the six objective.
- You are free to add to the other objectives (in the group dialogue or afterwards in plenum) as well but we want you



# Your task

Review the actions connected to the objective to which your group has been assigned.

Are there other actions that you would like to suggest to be added to the roadmap?

Be as specific as possible (who should do it when).



## To be noted:

The output of these dialogues are to be seen as suggestions and recommendations to be processed in appropriate forums.



# Overview of input

## Objectives for the Nordic Electricity Market 2030

### OBJECTIVE 1: FLEXIBILITY TO THE MARKETS

#### Group 1

Host: Emilie Popp

All flexible assets from producers, consumers and service providers can efficiently contribute to reliable and competitive functioning of the power system.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

EMIS	Nordics
<b>Action points part of updated roadmap:</b> <ul style="list-style-type: none"><li>Develop the flexibility working group under the NEMF Coordinator group with a view towards once flexibility</li><li>Coordinate on the CEP implementation, e.g. regarding aggregation and the upcoming demand flexibility guidelines</li><li>Coordinate a knowledge meeting (e.g. joint) upcoming results of the flexibility study, involve a study on aggregation and how to regulate them</li></ul>	<b>Action points part of updated roadmap:</b> <ul style="list-style-type: none"><li>Coordinate on the regulatory model to use flexibility as an alternative for resource investments</li><li>Assess regulatory barriers giving negative incentives for flexibility, taking into account the flexibility providers (e.g. demand flexibility, industrial plants in electricity etc.)</li><li>Coordinate CEP implementation, e.g. regarding aggregation and the upcoming demand flexibility guidelines</li></ul> <b>Additional suggestions or recommendations:</b> <ul style="list-style-type: none"><li>Assess the impact of different tariffs on the incentives to offer flexibility to the market</li><li>Assess the technical barriers to demand-side flexibility (e.g. lack of administrative and exchange-based processes to address them)</li><li>Regular assessment and publication of flexibility needs according to common Nordic and European practices to provide visibility for the market participants (also under objective 2)</li></ul>

### OBJECTIVE 1: FLEXIBILITY TO THE MARKETS

#### Group 2

Host: Hege Holte Nielsen

All flexible assets from producers, consumers and service providers can efficiently contribute to reliable and competitive functioning of the power system.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

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### OBJECTIVE 2: CLEAR PRICE SIGNALS

#### Group 3

Host: Antti Paananen

Clear price signals for all system needs across all time frames, price areas and voltage levels (TSO/DSO), rewarding flexibility and system support where effective.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

EMIS	Nordics
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### OBJECTIVE 2: CLEAR PRICE SIGNALS

#### Group 4

Host: Karin Tvingsjø

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### OBJECTIVE 3: ENABLING ELECTRIFICATION

#### Group 5

Host: Eva Centeno López

New sectors (transport, heating & cooling and industry (power to X)) are electrified and integrated into the electricity markets with their flexibility. Electricity markets enable system integration and support the move towards a cleaner Nordic society.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

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### OBJECTIVE 5: OPEN MARKET ACCESS

#### Group 7

Host: Peter Olsen

All clean electricity sources (e.g. offshore energy) are seamlessly integrated into the Nordic market.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

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### OBJECTIVE 4: NORDIC GRID DEVELOPMENT

#### Group 6

Host: Marielle Lahti

Welfare on a Nordic level is the guiding objective when preparing Nordic grid development plans considering large scale RES developments on- and offshore and designing Nordic bidding zone structures.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

EMIS	Nordics
<b>Action points part of updated roadmap:</b> <ul style="list-style-type: none"><li>Coordinate on qualitative model (CACM) and CEP implementation and how to use it in new European regulatory developments with an impact on markets</li></ul>	<b>Action points part of updated roadmap:</b> <ul style="list-style-type: none"><li>Coordinate on the regulatory model to use flexibility as an alternative for resource investments</li><li>Assess regulatory barriers giving negative incentives for flexibility, taking into account the flexibility providers (e.g. demand flexibility, industrial plants in electricity etc.)</li><li>Coordinate CEP implementation, e.g. regarding aggregation and the upcoming demand flexibility guidelines</li></ul> <b>Additional suggestions or recommendations:</b> <ul style="list-style-type: none"><li>Assess the impact of different tariffs on the incentives to offer flexibility to the market</li><li>Assess the technical barriers to demand-side flexibility (e.g. lack of administrative and exchange-based processes to address them)</li><li>Regular assessment and publication of flexibility needs according to common Nordic and European practices to provide visibility for the market participants (also under objective 2)</li></ul>

### OBJECTIVE 6: RESOURCE ADEQUACY

#### Group 8

Host: Fredrik Norlund

Resource adequacy is ensured through market-based solutions. Price signals guide investments, reflecting the value of resources in scarcity periods, and internalise the risk of inadequacy.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

EMIS	Nordics
<b>Action points part of updated roadmap:</b> <ul style="list-style-type: none"><li>Coordinate on qualitative model (CACM) and CEP implementation and how to use it in new European regulatory developments with an impact on markets</li></ul>	<b>Action points part of updated roadmap:</b> <ul style="list-style-type: none"><li>Coordinate on the regulatory model to use flexibility as an alternative for resource investments</li><li>Assess regulatory barriers giving negative incentives for flexibility, taking into account the flexibility providers (e.g. demand flexibility, industrial plants in electricity etc.)</li><li>Coordinate CEP implementation, e.g. regarding aggregation and the upcoming demand flexibility guidelines</li></ul> <b>Additional suggestions or recommendations:</b> <ul style="list-style-type: none"><li>Assess the impact of different tariffs on the incentives to offer flexibility to the market</li><li>Assess the technical barriers to demand-side flexibility (e.g. lack of administrative and exchange-based processes to address them)</li><li>Regular assessment and publication of flexibility needs according to common Nordic and European practices to provide visibility for the market participants (also under objective 2)</li></ul>





# OBJECTIVE 1: FLEXIBILITY TO THE MARKETS

**Group 1**  
**Host: Emilie Popp**

All flexible assets from producers, consumers and service providers can efficiently contribute to reliable and competitive functioning of the power system.

## SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

### EMG

#### Action points part of updated roadmap:

- Develop the flexibility working group under the NEMF Coordination group with a new mandate (local flexibility)
- Coordinate on the CEP implementation, e.g. regarding aggregators and the upcoming demand flexibility guideline
- Contribute to knowledge creation (e.g. publish upcoming results of the flexibility study, maybe a study on aggregators and how to regulate them)

#### Additional suggestions or recommendations:

- Accompanying the development of the network code for demand side flexibility
- Give instructions to national NRAs and TSOs to have common Nordic view on harmonisation
- Engage the Nordic politicians
- Make the Nordic institution act more coordinated
- Clearer actions for the flexibility group
- Market participants should be given the opportunity to contribute to the assessment of barriers

### NordREG

#### Action points part of updated roadmap:

- Enable DSOs in the regulatory model to use flexibility as an alternative for network investments.
- Assess regulatory barriers giving negative incentives for flexibility, taking into account new flexibility providers (e.g. district heating, industry) (also in objective 3)
- Coordinate CEP implementation, e.g. regarding aggregators and the upcoming demand flexibility guideline

#### Additional suggestions or recommendations:

- More harmonisation across the Nordic countries
- More positive towards pilots. Make the process regarding pilots easier
- Accompanying the development of the network code for demand side flexibility
- Market participants should be given the opportunity to contribute to the assessment of barriers

### Nordic TSOs

#### Action points part of updated roadmap:

- To encourage new local sources of flexibility, create local markets for local flexibility products in cooperation with the DSOs
- Coordinate Nordic sharing of best practices and experiences from pilot projects regarding TSO-DSO cooperation
- Coordinate and where possible, harmonize prequalification rules for flexibility providers to make it easier to be active in several markets
- Assess the impact of different tariffs on the incentives to offer flexibility to the market
- Assess the technical barriers to demand side flexibility (e.g. lack of automatization) and exchange best practices to address them

- Regular assessment and publication of flexibility needs according to common Nordic and European principles to provide visibility for the market participants (also under objective 2)

#### Additional suggestions or recommendations:

Pose more pilots

More information about ongoing processes and initiatives

Accompanying the development of the network code for demand side flexibility

This action point is too specific.

This might be more a DSO issue

Additional comment: Safeguard the Nordic interests in a European context



# OBJECTIVE 1: FLEXIBILITY TO THE MARKETS

## Group 2

Host: Hege Holte Nielsen

All flexible assets from producers, consumers and service providers can efficiently contribute to reliable and competitive functioning of the power system.

### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

#### EMG

##### Action points part of updated roadmap:

- Develop the flexibility working group under the NEMF Coordination group with a new mandate (local flexibility)
- Coordinate on the CEP implementation, e.g. regarding aggregators and the upcoming demand flexibility guideline
- Contribute to knowledge creation (e.g. publish upcoming results of the flexibility study, maybe a study on aggregators and how to regulate them)

##### Additional suggestions or recommendations:

Content of new mandate for the flexibility: (To monitor the coordination of CEP can be part of the mandate)

We would prioritize the 1st and 2nd action points. Knowledge sharing is still key here.

Implementation and disc. on feed-in tariffs of generators should be discussed in EMG (commercial aspects)

Reg. point of knowledge creation, they can highlight key regulatory topics of interest. Since we are in implementation phase, it is more recommendations on implementation in the countries that should have focus.

#### NordREG

##### Action points part of updated roadmap:

- Enable DSOs in the regulatory model to use flexibility as an alternative for network investments.
- Assess regulatory barriers giving negative incentives for flexibility, taking into account new flexibility providers (e.g. district heating, industry) (also in objective 3)
- Coordinate CEP implementation, e.g. regarding aggregators and the upcoming demand flexibility guideline

##### Additional suggestions or recommendations:

Action point on CEP implementation important. Could also share knowledge of the tasks delegated to the NRAs acc. legal framework. Look more into local flexibility markets.

In action point 2 include a positive incentives for DSOs to use flexibility in a transition period

Action point 1 good. Ensuring neutrality is an important task.

New text on 1: Ensure neutrality between the use of flexibility between the DSO. Improve the regulatory models and sharing the best practices.

#### Nordic TSOs

##### Action points part of updated roadmap:

- To encourage new local sources of flexibility, create local markets for local flexibility products in cooperation with the DSOs
- Coordinate Nordic sharing of best practices and experiences from pilot projects regarding TSO-DSO cooperation
- Coordinate and where possible, harmonize prequalification rules for flexibility providers to make it easier to be active in several markets
- Assess the impact of different tariffs on the incentives to offer flexibility to the market
- Assess the technical barriers to demand side flexibility (e.g. lack of automatization) and exchange best practices to address them
- Regular assessment and publication of flexibility needs according to common Nordic and European principles to provide visibility for the market participants (also under objective 2)

##### Additional suggestions or recommendations:

Action point 1: Rather use investigate instead of create. Also incl. NordREG work on local flex markets.

Action point 4: (In Norway it is the DSO tariffs that be focus) Instead of assess, it is better to have sharing of best practices. This point should be with the NRAs.

Action point 3 could also be relevant for NordREG

Reg. 4 and 5 on tariffs and tech. barriers: Coordination and cooperation is keyword, not assessments

On last action point it should be added system flexibility needs





## OBJECTIVE 2: CLEAR PRICE SIGNALS

## Group 3 Host: Antti Paananen

Clear price signals for all system needs across all time frames, price areas and voltage levels (TSO/DSO), rewarding flexibility and system support where effective.

### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

#### EMG

##### Action points part of updated roadmap:

- Coordinate on guideline revision (CACM) and CEP implementation and have an eye on new European regulatory developments with an impact on markets

##### Additional suggestions or recommendations:

Also FCA and EB guidelines should be looked upon

EMG does not have formal role in guidelines' implementation

Make political decisions to push forward one system (more integrated market - one Nordic system)

Lower total system costs for customers in Nordics + SoS ensured

Efficient system, price signals are relevant

Mandate and encourage NordREG/TSOs to develop market (eg. enable trading closer to real time)

#### NordREG

##### Action points part of updated roadmap:

- Every time there is a regional decision under the third package and the CEP, establish a coordination process to facilitate reaching a unanimous approval within the given times. Establish to this end all the necessary exchanges with the relevant TSOs and NEMOs

- Coordinate viewpoints on the revision of network codes and guidelines (e.g. CACM, FCA GLs) and CEP implementation, and have an eye on new European regulatory developments with an impact on markets

##### Additional suggestions or recommendations:

Try to be more forward looking and proactive with ACER etc when guidelines are developed/revised

NordREG should gather input from stakeholders -> propose changes in EU regulation

Enforcing rules - Nordic should be in front of enforcing 70% rule (make sure that rules are enforced)

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#### Nordic TSOs

##### Action points part of updated roadmap:

- Regulatory developments: Coordinate viewpoints on EU regulatory developments such as the revision of network codes and guidelines (e.g. CACM, FCA GLs) and terms, conditions and methodologies under CEP and follow new European regulatory developments with an impact on markets

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- Third package and CEP implementation: Arrive at a common grid model and flow based, proceed with 15 minutes imbalance settlement period and related market products, develop a Nordic methodology to determine the 70% in a rational manner, development of intraday auctions

- Continue with the Nordic balancing model and further European harmonisation – follow up on solutions report and continue Nordic cooperation on active consumers in Nordic balancing model.

- Create a coordinated transparent market for the procurement of ancillary – and system services with clear price signals

- Increased transparency on (close to) real-time system operation and prices and reporting on major incidents to the markets

- Regular assessment of flexibility needs according to common Nordic and European principles to provide visibility for the market participants. (also under objective 1)

- Develop a procedure for early Nordic stakeholder involvement in the preparation phase of market development work and implementation

- Define the compatibility needs in relation to digitalization, data management for flexibility markets and between the Nordic Data Hubs

##### Additional suggestions or recommendations:

Having dialogue with stakeholders on information needs

TSOs are already having ongoing process to gather inputs from stakeholders on concrete actions

Digitalization/datahubs (last bullet) might not relate to price signals

Not TSOs' task to define market products in DA and ID - rather NEMO's responsibility with input from market parties (TSOs may provide ideas)

Market access regulation should be simplified to get as many market participants as possible (not only TSOs' task)

## OBJECTIVE 2: CLEAR PRICE SIGNALS

## Group 4 Host: Karin Tvingsjö

Clear price signals for all system needs across all time frames, price areas and voltage levels (TSO/DSO), rewarding flexibility and system support where effective.

### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS

Reliability of the price signal should be added. Important with long term reliable signals

"all time frames" needs to be highlighted

both dispatch signals and investment signals important

different price signals for different time frames, reflecting the system needs (do not mix them)

new instruments must support the flexibility needs (PPAs, Citizens energy communities, Renewable energy communities)

#### EMG

##### Action points part of updated roadmap:

- Coordinate on guideline revision (CACM) and CEP implementation and have an eye on new European regulatory developments with an impact on markets

##### Additional suggestions or recommendations:

different regulation for different sectors hampers sector integration. How can we overcome that?

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#### NordREG

##### Action points part of updated roadmap:

- Every time there is a regional decision under the third package and the CEP, establish a coordination process to facilitate reaching a unanimous approval within the given times. Establish to this end all the necessary exchanges with the relevant TSOs and NEMOs

- Coordinate viewpoints on the revision of network codes and guidelines (e.g. CACM, FCA GLs) and CEP implementation, and have an eye on new European regulatory developments with an impact on markets

##### Additional suggestions or recommendations:

Standardizing local flexibility markets across the Nordics

making the DSO regulation less capex heavy

Difficult for actors participating in several parts of the Nordics that the local flexmarkets have different rules, harmonisation should be strived for.

DSO NDPs and TSO TYNDPs can be an important tool in transparency and predictability

optimise the use of the new rules for the Directive on NDPs could be a tool to increase transparency and predictability

transparency needs to increase across borders so that tsos can understand and explain for market actors

transparency at network planning level in order for market actors to plan ahead and make sound decisions

#### Nordic TSOs

##### Action points part of updated roadmap:

- Regulatory developments: Coordinate viewpoints on EU regulatory developments such as the revision of network codes and guidelines (e.g. CACM, FCA GLs) and terms, conditions and methodologies under CEP and follow new European regulatory developments with an impact on markets

- Third package and CEP implementation: Arrive at a common grid model and flow based, proceed with 15 minutes imbalance settlement period and related market products, develop a Nordic methodology to determine the 70% in a rational manner, development of intraday auctions

- Continue with the Nordic balancing model and further European harmonisation – follow up on solutions report and continue Nordic cooperation on active consumers in Nordic balancing model.

- Create a coordinated transparent market for the procurement of ancillary – and system services with clear price signals

- Increased transparency on (close to) real-time system operation and prices and reporting on major incidents to the markets

- Regular assessment of flexibility needs according to common Nordic and European principles to provide visibility for the market participants. (also under objective 1)

- Develop a procedure for early Nordic stakeholder involvement in the preparation phase of market development work and implementation

- Define the compatibility needs in relation to digitalization, data management for flexibility markets and between the Nordic Data Hubs

##### Additional suggestions or recommendations:

Coordination btw TSOs and DSOs, what can be harmonized on a nordic level and what needs to be local specific?

transparency from tsos and dsos is important, short term, non transparent interventions should be avoided, need for market participants to understand and look ahead.

what is the optimal use of flexibility for the market altogether? how to coordinate this aspect?

transparency needs to increase across borders so that tsos can understand and explain for market actors

transparency at network planning level in order for market actors to plan ahead and make sound decisions

Item 1-3 is "need to"

Increased transparency is very important to market actors to make investment decisions

Regular assessment of flexibility also highly important

Standardised communication /IT environment more important.

will harmonisation of data hubs make any difference? the implementation of IA regulation and BSP regulation more important, more important than how we build the data hubs.

## OBJECTIVE 3: ENABLING ELECTRIFICATION

### Group 5

Host: Eva Centeno López

New sectors (transport, heating & cooling and industry (power to X)) are electrified and integrated into the electricity markets with their flexibility. Electricity markets enable system integration and support the move towards a cleaner Nordic society.

#### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

##### EMG

##### Action points part of updated roadmap:

\* ...

##### Additional suggestions or recommendations:

Action 1 NEW

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##### NordREG

##### Action points part of updated roadmap:

- Assess regulatory barriers giving negative incentives for flexibility, taking into account new flexibility providers (e.g. district heating, industry) (also in objective 1)
- Educate and inform industrial users about the role they can play in the markets and encourage their participation
- Evaluate implementation of the water framework directive and ongoing legislative processes (taxonomy) connected to the use of hydropower so that they do not create unnecessary obstacles for reinvestment or reduce the access to flexibility from hydropower.

##### Additional suggestions or recommendations:

Some more words on what regulatory barriers are such as tariffs, taxes on for example electricity storage, correct pricing, transparent and reliable

Ministries should develop right framework for electrification, regulators don't have the right regulatory framework nowadays

The mandate for regulators is limited to gas and electrification but more sectors need to be addressed to enable electrification, maybe can be solved by others means such cooperation but in that case structured.

Taxonomy is out of the mandate of the regulators, the taxonomy issue is something for the government

Not only regulatory barriers but also legal barriers

Grid capacity will be key for electrification, how can we improve the possibilities for new consumers to connect in due time? NRAs, TSO and Governments, task for

Give incentive to located production/consumption wherever is is needed/ reduce the need to build the grid, not meaning to change price areas but within existing price area

##### Nordic TSOs

##### Action points part of updated roadmap:

- Continue working on the Nordic TSOs strategy on sector integration (which is expected for stakeholder consultation before summer 2021)
- Educate and inform industrial users about the role they can play in the markets and encourage their participation

##### Additional suggestions or recommendations:

consultation started already one week ago, spring 22 will be published, TSO strategy on wind development and sector integration

Instead of educated dialogue, it could be difficult to participate due to technical requirements

SKGS raises the work done in Finland with industry participating in markets

Point two is about participation in reserve markets

Continuous dialogue on other reserves at the Nordic TSO level

Important to look at the role of exceed heat in order to avoid building grid where other more efficient solutions can be chosen





# OBJECTIVE 4: NORDIC GRID DEVELOPMENT

## Group 6 Host: Marielle Lahti

Welfare on a Nordic level is the guiding objective when preparing Nordic grid development plans considering large scale RES developments on- and offshore and designing Nordic bidding zone structures.

### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

#### EMG

**Action points part of updated roadmap:**

- Support coordination on TEN-E revisions

#### Additional suggestions or recommendations:

Help TSOs, coordinate on a Nordic level with the help of national electrification schemes

Convey: The society's vision, political vision and target

Is it sufficient with political will? Permits need to follow - regulator

Regional or national based investments - different businesscases. Clear political direction needed

Perhaps enhance Nordic cooperation apart from EU-regulation, where common interests

**Main point 1: General comment, many initiatives are ongoing on a Nordic/ Baltic level. Why is this part of the work now? Is it necessary?**

**Main point 2: Support investment climate, long term vision. Holistic approach**

#### NordREG

**Action points part of updated roadmap:**

- ...

#### Additional suggestions or recommendations:

Perhaps oversee for example Nordic electrification or other area?

Perhaps areas relating to permits when grid development

The NRAs have somewhat different roles and mandate connected to legislation

Voluntary enhance cooperation apart from EU-legislation, where common interests

**AP 1: The typical cases, the CBA is somewhat outside the scope. What is the decision criteria? The method is not an issue.**

**AP 2) Compare how Baltics use EU-financing, what benefits does this bring in the end apart from getting EU-financing**

**AP 2) Use PCI framework on a Nordic level?**

#### Nordic TSOs

#### Action points part of updated roadmap:

- Develop a method for cost-benefit assessment if grid projects are clearly beneficial from a Nordic point of view but less from a national point of view

- Enhance the use of the PCI framework

- Designing and implementing a Nordic transmission grid development plan to integrate the expansion in RES production (also under open market access)

- Bidding zones should be assessed from a Nordic benefit point of view

#### Additional suggestions or recommendations:

On the scoping of the objective: include the whole investment climate. For example security of supply, how to invest in new generation etc. Not only from a dispatch perspective

Should we accept a certain amount of congestion and use other tools to cope with this?

How to do grid planning? Society point of view etc

**The green notes below are not all directed at the TSOs but rather reflects the discussion**

National decisions on grid development vs Nordic grid development. Ex East-West flows impact on SE

On the objective: not only large scale, also market driven evolution locally. Needs to be more holistic approach

Alternative to grid development, bidding zones. In the future - more or less bidding zones

Different approaches in the nordics: Ex FIN - one bidding zone. DK/ SE - several bidding zones.

More varying flows going forward, new strains on the grid. New congestion etc.

Grid development: welfare maximisation point of view vs investment climate - How to incorporate?

Important to have a road forward

Perhaps possible to have more voluntary cooperation, apart from legal demands (EU)

General comment, many points already regulated for example AP 4 on bidding zones



## OBJECTIVE 5: OPEN MARKET ACCESS

## Group 7 Host: Peter Olsen

All clean electricity sources (e.g. offshore energy) are seamlessly integrated into the Nordic market.

### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

#### EMG

##### Action points part of updated roadmap:

- Contribute to coordination on TEN-E revision regarding offshore market design

##### Additional suggestions or recommendations:

TEN-E coordination a regional focus instead of a national one for enabling the next phase of the large scale offshore RES.

There might be a need for coordinating views on subsidy on production - to deliver on the target or can the market deliver without coordinated subsidy?

Do not loose sight of the target carbon neutrality and cost efficiency.

coordinate development of the taxonomy at nordic level

#### NordREG

##### Action points part of updated roadmap:

- ....

##### Additional suggestions or recommendations:

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#### Nordic TSOs

##### Action points part of updated roadmap:

- Develop a Nordic solution on offshore market design
- Coordination and exchange of views with stakeholders on issues related to financing and ownership to offshore infrastructure.
- Designing and implementing a Nordic transmission grid development plan to integrate the expansion in RES production (also under a coordinated Nordic grid development)

##### Additional suggestions or recommendations:

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#### PRODUCERS

FOR THE PRODUCERS:  
TEN-E coordination a regional focus instead of a national one for enabling large scale offshore RES.

coordinate development of the taxonomy at nordic level





# OBJECTIVE 6: RESOURCE ADEQUACY

## Group 8 Host: Fredrik Norlund

Resource adequacy is ensured through marked-based solutions. Price signals guide investments, reflecting the value of resources in scarcity periods, and internalize the risk of inadequacy.

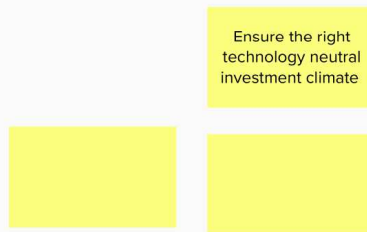
### SUGGESTIONS FOR IMMEDIATE AND FURTHER ACTION POINTS FOR THE STAKEHOLDERS;

#### EMG

##### Action points part of updated roadmap:

- Coordinate the policy work regarding “security of supply”

##### Additional suggestions or recommendations:



#### NordREG

##### Action points part of updated roadmap:

- ...

##### Additional suggestions or recommendations:

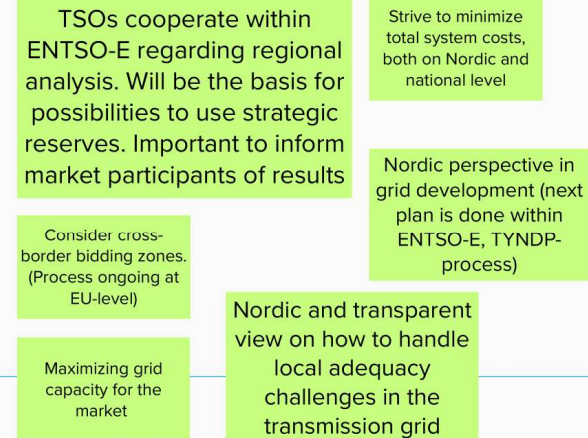


#### Nordic TSOs

##### Action points part of updated roadmap:

- Coordination of possible measures to ensure resource adequacy
- Regional analysis of resource adequacy

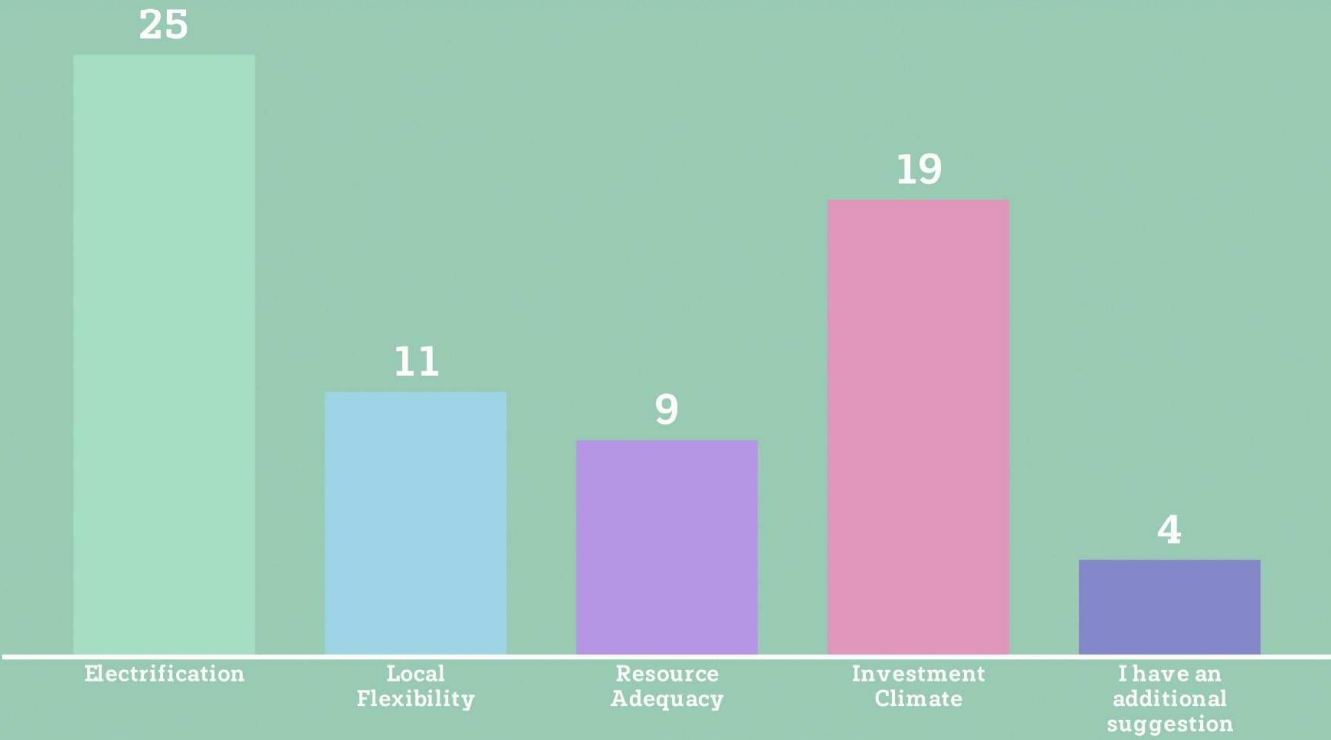
##### Additional suggestions or recommendations:



# Part 3)

## Idea gathering: Themes for next forum

# What do you think could be a relevant theme to focus on for our next forum?



# In future forums, it would also be interesting to focus on:

RES market Integration

I think the financing and developing the necessary infrastructure is of essence

a) Development Network Code for Flexb)  
Implementation EU Clean Energy Package: Market-based redispatch, Market-based flex procurement for DSOs

Electrification

How to even further reach a common grid without price area differences

Wider Nordic based Sector Integration / e.g. electricity, gas, heating, cooling and transportation.

Nordic ISO/ITO

We might need to be open also for what might appear within 6 months. Last Spring when flex was decided as the main topic, we didn't see Covid nor the take up of electrification

Offshore wind

# In future forums, it would also be interesting to focus on:

DSO Business models

Comment to next: the challenges that electrification poses to the Nordic systems. And what measures need to be taken Nordenergi study, Swedish strategy can be presented.



# Concluding the forum...

# The Forum Way of Work (2021)

## Q4

Take stock of the virtual years and celebrate the success stories.

Find out how we continue to work on the Roadmap and the Vision

Presentation of the forum outcomes & Roadmap

Get a new subject for the physical Forum in December

## Q3

Nordic Electricity Market Forum: IN REAL LIFE (?)

Coordination Group and Working group(s) meetings

Coordination Group Working group(s)

EMG meetings

September: Nordic Council Energy Ministers meeting

Nordic Electricity Market Forum Online Session 1

Nordic Electricity Market Forum Online Session 2

Coordination Group Working group(s)

EMG meetings

## Q1

Until 4. March: internal work on questions for the stakeholder

After 4. March: NEF and EMG collect input and work on session 2, with help of the NEMF coordination group

## EMG

Update of Roadmap for the Nordic Electricity Market, work towards the Nordic Council meeting

## Coordination Group/WGs

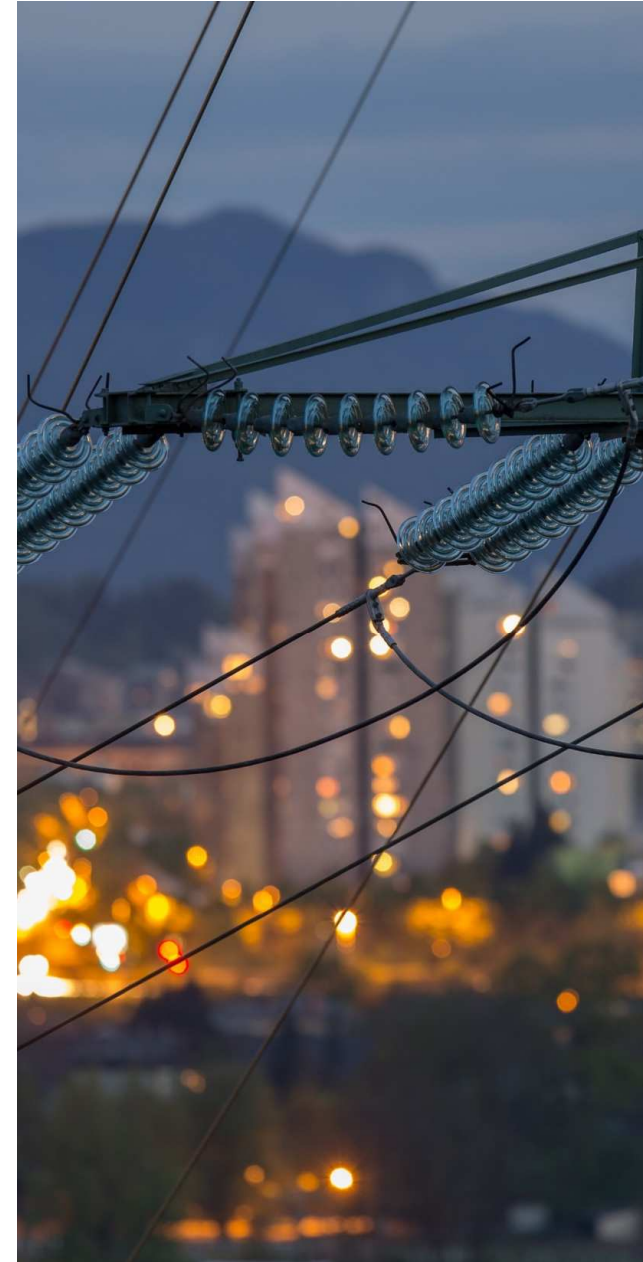
Contribute to new Roadmap Based on new roadmap discuss and find topics for the physical forum. Collect input from all stakeholders

## Q2



# Next steps

- Update the roadmap (and present it to the ministers in September)
- Start work on preparing the next Forum (hopefully physical) in December, where we will also follow up on the action points
- Work with the Coordination Group & Relaunch of the Flexibility working group to look into Local Flexibility
- Sendouts :
  - Presentations & murals
  - The roadmap
  - Publish the AFRY report on local flexibility markets





# Thank you.