

Consumers and local initiatives in a changing market

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On behalf of CEDEC



Who is CEDEC?

European Federation of Local Energy Companies

- 1500 local and regional energy companies
 - Electricity and heat generation
 - Electricity and gas distribution grid & metering operators
 - Energy (services) suppliers
- 85 million electricity and gas customers & connections
- > 350 000 employees
- Annual turnover ca. 120 billion
- Enhancing competition in the energy market

Key figures Alliander

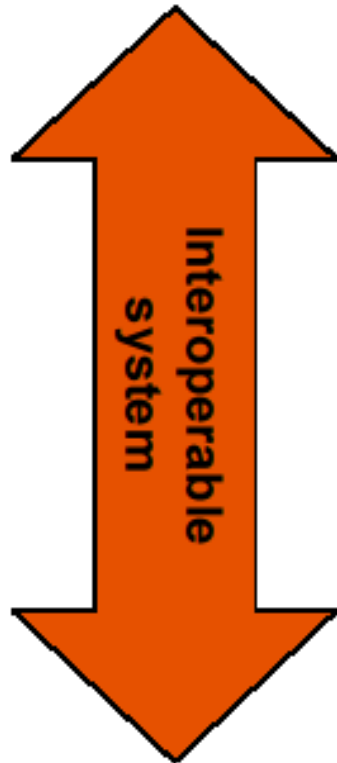
- Founded 1st of July 2009 after unbundling of Nuon
- Largest grid operator of the Netherlands (38% market-share)
- Core activities: grid operations, complex energy infrastructures and public lighting
- Owned by Provinces and Communities
- 3+ million clients (electricity and gas)
- Annual turnover: € 1.586 Million in 2011



Classic positioning of the customer in the energy value chain



Changing perspective: interaction between levels



- **Home energy management systems**
 - Switchable demand (fridges, hot water boilers)
 - Personal storage (EV)
 - Generation (solar, urban wind, heatpump, micro chp)
- **Local energy management systems**
 - Transparent market for customers to trade in energy
 - Stable power quality
 - Reliable energy system
- **Grid management**
 - Link with (inter)national power market and industrial loads
 - Forecasting system loads
 - Managing transport flows
 - Seasonal storage

New low voltage network dynamics

Supply side changes



wind

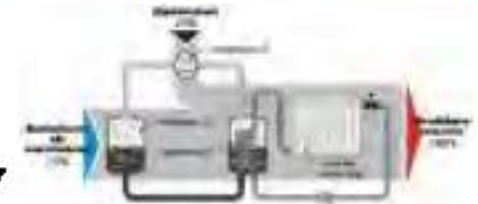


Solar



Peak management
Power Quality
Balancing issues

Demand side changes



Heat pumps, Micro CHP



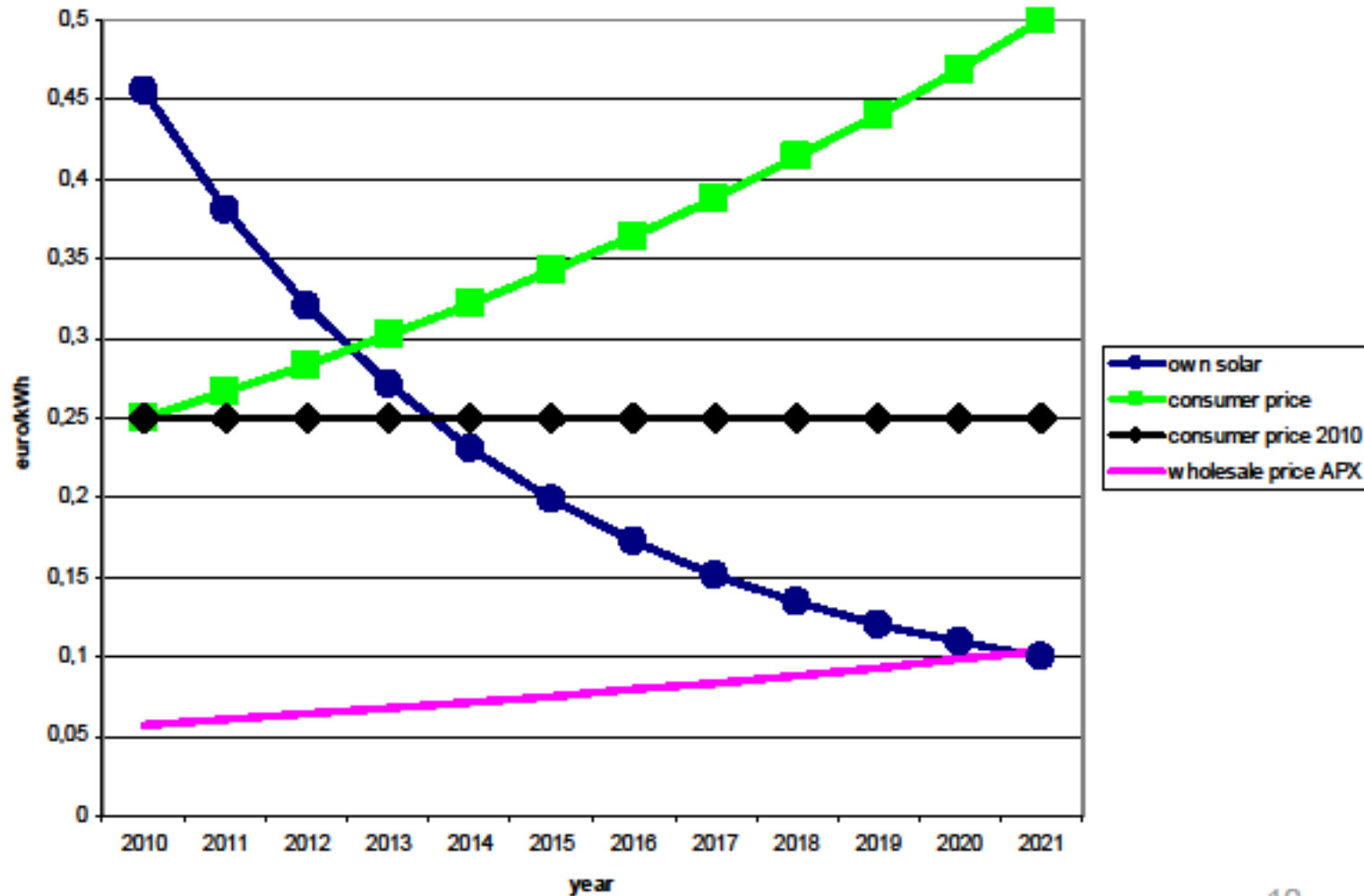
Energy management



EV charging

Energy saving instruments
Flexible infrastructure solutions

What would customers do after 2014?



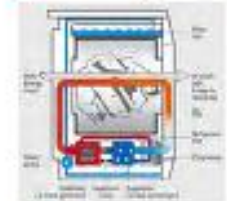
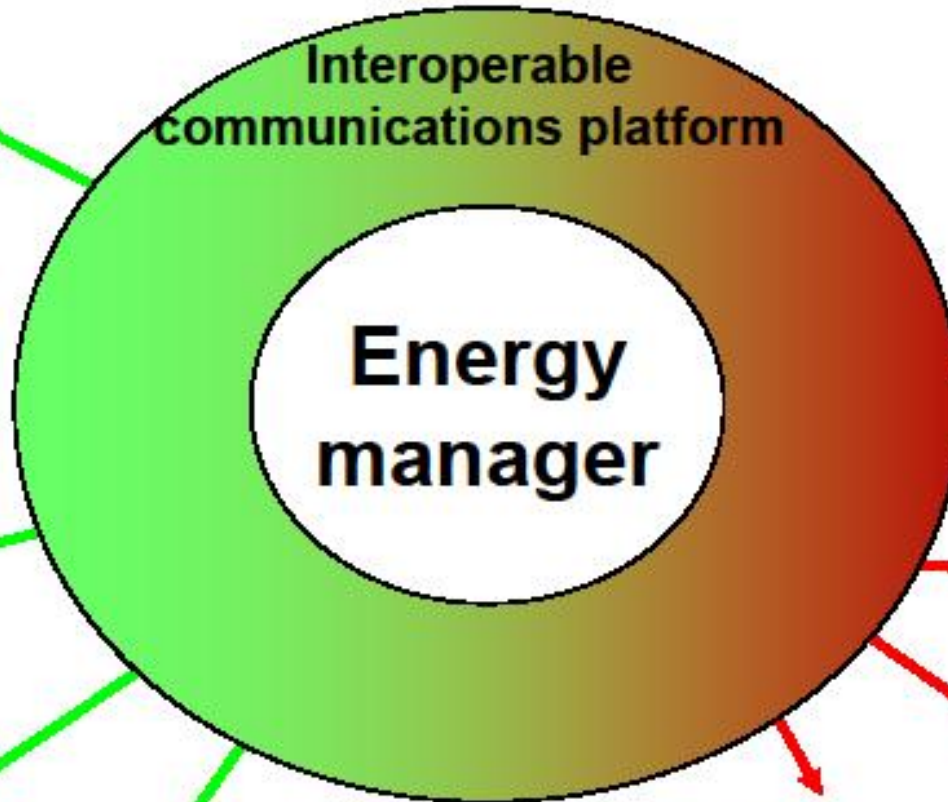
The big changes

- The distinction between producer and consumer becomes irrelevant.
- It is not about selling energy, but managing power
- The customer becomes an active participant
 - Matching their own supply and demand
 - Selling temporary surplus
 - Buying temporary shortfalls



ZONVOGEL

The future energy customer



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New positioning of the customer in the energy value chain: the empowered EU consumer comes first

