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Situation Analysis

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1.4 List of tables

Table	Name
1	The SAT team

List of figures

Figure	Name
1	Organisation

1.5 List of abbreviations

Abbreviation	Definition
FlexiGrid	Enabling flexibility for future distribution grid – FlexiGrid
SAT-Team	Situation Analysis Team
KER	Key Exploitable Results

2 Contents

1.1	Authors	2
1.2	Reviewers	2
1.3	Version History	2
1.4	List of tables.....	2
1.5	List of figures	2
1.6	List of abbreviations	2
2	Contents.....	4
3	Introduction	5
4	Approach.....	5
4.1	Content of the situation analysis.....	5
3.2	Members of the SAT team.....	6
3.3	Dynamic reference groups	7
3.4	Methodology	7
3.4.1	Meetings with the SAT-team.....	8
3.4.2	Setting up reference groups.....	8
3.4.3	Interaction with the project consortium.....	9
3.4.4	Dedicated workshops.....	9

3 Introduction

The FlexiGrid project develops an enabling architecture for unlocking flexibility resources in small to medium distribution networks. The work includes digital and smart grid technologies at the grid edges as well as innovative business models and a flexible DSO-customers coordination platform for efficient real-time trading of energy and grid services between market actors.

The complex challenges that FlexiGrid will address come from fast changes and challenges in the DSO environment: changing patterns in supply and demand and links between different sectors, changing needs for flexible markets, the need for a more active role of the DSO, evolutions in the potential for digitalisation, regulatory challenges and increased concerns about safety and security of the grid.

With the FlexiGrid consortium, an integrated approach is set up to tackle these challenges. However, between the submission of the project proposal and the end of the project, almost 6 years will pass. With the current speed of transformation of the energy sector, this is a very long period. The status of the energy grid and markets changes, expectations and boundary conditions develop, and legal challenges differ.

Therefore, the objective of Task 1.4 (Situation Analysis) is to analyse external events and to develop recommendations to project management for alignment and adjustment. In Deliverable 1.3 a routine and structure for the Situation Analysis Team's (SAT-Team) is outlined, including how it will report on external events affecting the sector and how the recommendations to project management will be managed. D1.3 corresponds to activities within Task 1.4.

4 Approach

4.1 Content of the situation analysis

The approach of FlexiGrid is to work with external advisors, the 'Situation Analysis Team'. These are senior members of relevant global and European networks and agencies that have the best and first-hand insights in ongoing external events. Their work focuses on to continuously align FlexiGrid with external trends and events, rendering in a project that maximise its relevance to the society.

With those insights, we will be able to critically assess the status of the project in three steps:

- 1 Position ourselves (what is the relevance of this project and where do we position our actions in the ongoing transition?)
- 2 Question that position (are we still doing the right thing to reach our goals?)
- 3 Give feedback to the project management + the external SAT-team

To reach these goals, this task proposes a strategy for communication and interaction with the SAT team.

Important subjects to discuss with the situation analysis team include:

- Trends in technology development e.g., price, availability, improvements etc.
 - Is any technology evolving faster than others, e.g., solar PV, batteries, thermal storage?

- Changes in policies e.g., new subsidy programs, at national, EU or international level, etc.
 - Are any new policies being discussed or implemented? E.g., regarding distributed generation, storage, possibility for customer participation etc.
 - Are any particular technologies promoted more or less?
- New or innovative business models, market structures etc.
 - Any new business models for distribution system operators or electricity retailers being discussed or implemented? E.g., customer participation, local energy markets etc.
 - Any changes in the structure of the electricity market within EU?
- Changes in regulation
 - Are there any changes proposed in the regulatory framework for the electricity sector on a national/European level?
- Political trends
 - Any changes in the political climate?
 - Changes in interest for sustainability?
- Changes in social acceptance
 - Any changes in the customers interest or acceptance for e.g., local energy communities, microgrids, customer participation in the electricity market or customer owned production?
- Vision of utilities
 - How are utilities, especially DSOs, adapting to changes and what are their vision for the future?
- Upcoming projects (national/EU/international level) that are important to follow?

3.2 The SAT-Team

The-SAT-Team consists of:

- Joni Rossi (RISE) – Task Leader for Task 1.4
- Magnus Andersson (IMCG) - Project Coordinator
- Other members of the project consortium (innovation experts, WP leads, communication experts) as required.

3.3 The External SAT-Team

The project has already agreed to cooperate with a number of senior experts that are well connected to global and European networks and organisations such as ISGAN, EIB, InnoEnergy, etc., and who will henceforth make up the standing external SAT-team.

The SAT-team has an advisory function for the Management Board of the Project and is called upon by the Project Coordinator and the Task Leader for Task 1.4 as explained in Section 3.4 below.

Table 1. The External SAT-Team

Major theme	Main contact persons	Expertise and relevance
Regulation and Policy	Karin Widegren (Senior member of the International Smart Grid Action Network, ISGAN)	Karin Widegren, earlier head of ISGAN, supports within regulation, standards, network (SAT manager). ISGAN is a multilateral government-to-government collaboration to advance the development and deployment of smarter electric grid technologies, practices, and systems. Reports ministers of the Clean Energy Ministerial, in addition to satisfying all IEA Implementing Agreement.
Legal challenges & investments	Sara Bell (CEO Tempus Energy)	Sara Bell combines a financial markets systems risk career with energy system innovation. Director of the Association of Decentralised Energy, a member of the High-Level Group of i24C, the Industrial Innovation for Competitiveness initiative, a member of the Scientific Advisory Council for Energy for the Engineering & Physical Sciences Research Council. She has also recently been appointed to the EU Flexibility Task Force. Sara will support with legal challenge and investments expertise.
Financial Instruments and Bankability	Shelley Forrester (Senior Advisor at European Investment Advisory Hub. Earlier Managing Director, CIBC World Markets)	EIB Advisory Hub, provides expertise and support for developing financial instruments and bankable business models.
Innovations, Exploitation replication	Bo Normark & Johan Söderbom (KIC Inno Energy)	Bo Normark and Johan Söderbom, leads most relevant innovation and exploitation paths for project findings through InnoEnergy and frequently supports DG Energy. He supports FlexiGrid with innovation paths, funding opportunities and investments and network.

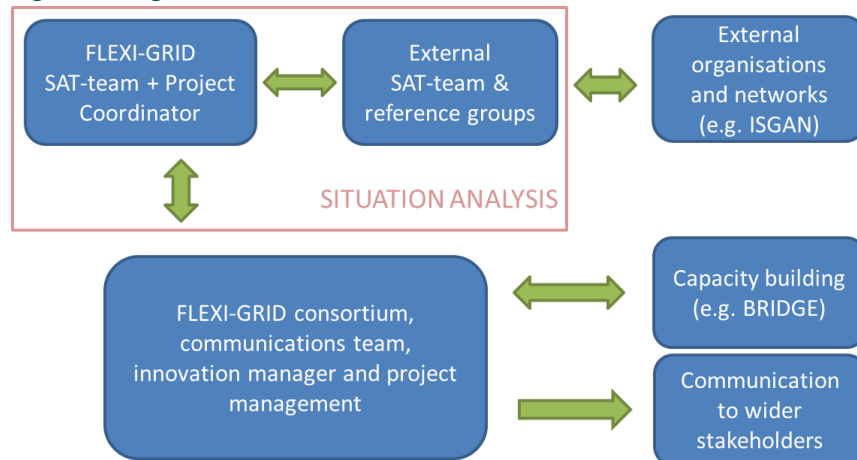
3.4 The Dynamic Reference Groups

In addition to a standing external SAT-Team, the project also utilises a system of dynamic reference groups. The groups of senior experts are brought together because of their ability to advise on specific questions or needs within the project and provide recommendations to increase the quality of the project and its output. The FlexiGrid Coordinator has developed and evaluated this approach in the FP7 project CELSIUS (Celsiuscity.eu) with good results.

3.5 Methodology

The FlexiGrid SAT Team will organise meetings with the external SAT-team and the dynamic reference groups on a regular basis – generally in combination with meetings of the Management Board. In this manner, there will be direct communication with the FlexiGrid consortium (see Figure1).

Figure 1. Organisation



3.5.1 Meetings with the SAT-team

The FlexiGrid SAT-Team will keep regular contact with the external SAT-team, informing them about the progress of the project and possibilities to attend project meetings or workshops:

- Informal contact will be kept through phone conference or interview between the member(s) of the FlexiGrid SAT-Team and member(s) of the external SAT-Team. This form of contact will be on an as-needed basis.
- More formal meetings will be held about twice a year, and the Project Coordinator will seek to combine them with meetings of the Management Board.

During these meetings, the group will discuss findings and potential questions from experience within the project, get input and updates from external organisations that might answer the questions and discuss if some of the project tasks and work will have to be revised.

It is important that the dialogue goes in two directions: input from the external SAT-team will greatly support and improve FlexiGrid’s ongoing work, but the goal is also to provide the external experts with relevant experiences and updates. For example, the project consortium plans to formulate high level regulatory recommendations, prepare for European market innovations, share experiences on legal challenge, all of which can support the work of the external SAT-team.

All meetings will be documented appropriately and notes shared with the members of the project.

3.5.2 Setting up Reference Groups

The Project Coordinator will set up reference groups when needed.

Reference groups could be designed for project management or the project-specific concepts. This is a new approach compared to the usually more static reference groups that to a larger extent becomes obsolete. It requires more emphasis in coordination to attract and set up relevant groups. This work is managed by the Project Coordinator, supported by the SAT-Team.

3.5.3 Interaction with the project consortium

At the consortium meetings as well as on the regular consortium calls, the FlexiGrid SAT-team will update the project consortium on the situation analysis by giving advice based on discussions with the external SAT-team and reference groups and formulate recommendations for the project management.

The guidance gives the possibility for the project coordinator to align R&D&I activities in an ever-changing world, rendering in results that are more relevant to the Global/European community. If needed, the project management will take action based on external events affecting the energy sector and if necessary adapt certain tasks or expectations in the project.

It also supports other task and WP leaders with information on external events. It supports communications and innovation teams to enhance impacts of project results and the partners with the development of business models and relevant financial instruments for deployment and replication.

On the other hand, the partners in the project consortium will be regularly requested to answer some questions for the situation analysis, for example technical or legal barriers that they encounter, upcoming innovations that might be relevant for the project, and questions to the SAT-team. If necessary, individual WP-leads will be interviewed by the FlexiGrid SAT-team to get the necessary input for the SAT-meetings.

3.5.4 Dedicated workshops

In order to increase and strengthen the interaction between external partner organisations, internal and external SAT-teams, the project consortium and WP leaders, dedicated workshops are planned. The aim is to support the work in different work packages with direct input from the workshops and to deliver results that are of direct interest for the external SAT-partners.

4 First results and planning

Table 2. Planned events.

Date	Event	Action	Status
December 2019	Kick-off meeting	Presentation by Joni Rossi 'Smart Grids Foresight - What's on the horizon? Putting FlexiGrid into a context and perspective'.	finalised
August 2020- January 2021	Interviews	3 interviews with Karin Widegren	finalised
October 2020- April 2021	Interviews	3 interviews with Sara Bell: Focus regarding the legal challenges promoting flexible energy systems.	finalised
January 2021	Workshop	Interactive workshop in Toronto, Canada with FlexiGrid, NestNet and ISGAN + white paper	finalised
January 2021	Interviews	Interview with Johan Söderbom	finalised
June 2021	Workshop	Interactive workshop with ISGAN + white paper	Planned
July 2021	Meeting	Organise a session with SAT-members at the consortium meeting and EC reporting meeting in Brussels	TBC

4.1 SAT-team meetings

4.1.1 Kick-off meeting

At the kick-off meeting Joni Rossi gave a presentation on 'Smart Grids Foresight - What's on the horizon? Putting FlexiGrid into context and perspective. Before this presentation, Karin Widegren (ISGAN) and Johan Söderbom (InnoEnergy) were contacted, informed about the project and they gave input (presentations) for the meeting.

4.1.2 Interviews with Karin Widegren

A series of 3 meetings were organised with Karin Widegren (ISGAN) in the period august 2020 to January 2021. The focus of these interviews was to discuss the challenges in policy and regulation and to get the latest insights that might affect the scope and direction of the project.

The interviews were organised by Joni Rossi (RISE, internal SAT team), Wenche Tobiasson (RISE, WP2 leader) and Sofia Nyström (RISE analyst). The information was integrated with the ongoing tasks in WP2, especially the workshop on local market design.

Background

The partners in FlexiGrid worked horizontally, across different work packages, on the design and the desirable characteristics of a local market and the questions of what makes a market efficient. This led to a first series of deliverables and a workshop on efficient market design with focus on market liquidity and information availability. The work revealed many insights but also raised a number of questions, many of which were in the field of regulation.

- ▶ Policy/regulatory requirements for DSOs to take on a new role
 - ▶ Can a DSO be a market facilitator?
 - ▶ Are DSO allowed to buy flexibility/energy?
 - ▶ Can DSOs use its position to sell services?
- ▶ The role of regulation/policy in ensuring sufficient level of information
- ▶ The role of regulation/policy in ensuring sufficient market liquidity

Some of the important insights include:

The changing role of the DSO

It is clear from the Clean Energy Package that the role of the DSO will change dramatically, from being a network operator to a system operator and a more active market facilitator. This brings a list of challenges on its own: regulatory incentives promoting grid modernisation, tariffs and procurement of flexibility, DSO-TSO relationship, data management, security and privacy and market arrangements. Adding to these challenges is the fact that the necessary regulatory changes will stretch the boundary between clearly regulated DSO core activities and competitive non-DSO activities, giving room to grey areas in the field of storage, flexibility, charging infrastructure, end-user energy efficiency and

engagement with consumers. The new European customer centric concept can weaken the clear unbundling activities of the DSOs and this is an ongoing discussion point.

FlexiGrid will help gaining insights in some of these implications. Member states should transpose the European Electricity Market Directive and implement into national law within 18 months, a process that the project will follow closely, particularly regarding the rights and roles of DSOs, energy communities, aggregators and other stakeholders.

For the DSOs, a key aspect involves incentives to procure flexibility services. Even if certain exemptions exist and can currently be implemented due to a lack of existing market actors offering those services, the goal is that a neutral third party should engage with the end-users and offer them the best solution. Although it may seem more cost-efficient and practical for a DSO to install and run the market (see examples in the USA), the goal of the EU is that the DSO is the one who procures flexibility services. The project will look at other existing flexibility markets in other countries and learn from the existing agreements. Moreover, it is important to develop platforms and business models including third parties, and to make them more efficient and simpler to implement for all users.

Access to data, ownership and security

The access and ownership of data will be crucial, both for the development of local markets and for the DSO in order to become a more active market player and offer new services to its customers. This presents many challenges and the topic is still under discussion. Customers' data is well regulated, and customers' rights are determined. NRAs should make sure necessary customer data are shared with third parties with respect to customers choice. However, the distinction has to be made between technical data, owned by the DSO, and customer data. This distinction is not always clear, despite being a key issue when defining models for data management. Data management arrangements should highlight the benefits of sharing customer meter data with third parties and at the same time protect the privacy of personal data.

In some countries the DSOs are the data management coordinator or data hub, but in some countries, this is a third party. When looking at the development of local markets in the FlexiGrid project, this topic should be carefully considered, and differences between countries should be taken into account.

4.1.3 Interview with InnoEnergy, Johan Söderbom

The interview focused on how the flexibility market has changed, from an investment and solution perspective – areas which are part of InnoEnergy's day-to-day activities, since FlexiGrid was formulated. Investment and solutions perspectives are important FlexiGrid areas since they effect exploitation and utilisation of identified Flexible KERs. The key-findings of the interview were:

- Investment into solution and technology. Flexibility providers are not a *hot investment* area. This is mainly due to that it is hard to see scale of business in this area. The hot areas today are batteries and storage. Thus, it is important for FlexiGrid KERs to have this trend in mind. It could be a minor obstacle advancing in TRLs, beyond project termination, to reach market ready solutions.
- At the time developing the FlexiGrid proposal, there were few, if any, platforms that could deliver a reliable flexible marketplace. An existing example at that time was the FED-project, in

which Ericsson delivered a pilot flexible market platform. This platform was State of the art since it encompassed several energy vectors. Today, there are flexible market platforms demonstrated through e.g., H2020 COORDINET (on a DSO-TSO level). Additional to these developments are that the large Automation system providers at Siemens, ABB, Emerson, etc. develop solution for flexible markets. They do not see this as major revenue stream; they see it as a response to fulfil client requests. This is important news for FlexiGrid. This could largely affect the utilisation of KERs. With acknowledged market actors delivering robust IoT platforms, it is an opportunity for the successful KERs of FlexiGrid to find a faster path to market.

- The flexibility market is expanding in its development. InnoEnergy acknowledge that there are *Flexibility R&I* development at RES providers, e.g. windfarms, solar power parks. These actors would like to increase margins providing fossil-free energy to the grid. By developing its flexibility to deliver, they support the market when it is of need of power.

Suggested FlexiGrid actions based on information

- Action should be taken to find the automation system actors building IoT platforms that supports flexible market solutions.
- Contact should be taken to initiate a collaboration dialogue with the most prominent actors. They will most likely need state-of-art solutions to be displayed on their platforms. These actors have a built-up marketing and sales team, which are of great interest to FlexiGrid since it could excel future market deployment.
- The KER partners in FlexiGrid should know about the existing investment-landscape.

Next follow up meeting with InnoEnergy

It is planned in Q3 when FlexiGrid has advanced in the suggested actions above.

Other:

At InnoEnergy Johan Söderbom will be the main FlexiGrid SAT-contact.

4.1.4 Interview with Sara Bell

The interview focused on how the flexibility market has changed, from a legal perspective, since FlexiGrid was formulated. This is an important FlexiGrid area since it largely affects large scale of deployment of flexible markets. Tempus, the company owned by Sara, has ongoing legal challenges through the European Court against UK and Poland, regarding the fossil-based investments underpinned by the national energy capacity markets.

The key-findings of the interview were:

- The oil & Gas lobby is, according to Sara, strong. They are spending resources to promote a fossil-based capacity market. They are well resourced, and they want to protect a business with good margins.
- The large investment in reinforcing energy capacity is a major obstacle for future fossil free energy markets. Thus, also a major obstacle of reaching EUs long-term climate goals.

Suggested FlexiGrid actions based on information

These are major obstacles to future deployment of fossil-free energy markets – however FlexiGrid has now objectives to battle the fossil-based energy capacity market. Whilst the obstacle is beyond the project scope, the project is strongly committed to supporting EUs objectives; Fit for 55, the SET plan, etc. Our conclusion is that FlexiGrid, particularly through WP2 and WP9 will investigate further into this obstacle. The result of this obstacle and possible mitigation measures should be discussed with our sponsor DG Energy, suggestibly the DG Energy Project Manager of Storage and Energy, Irazoqui Cristobal. If relevant, BRIDGE or new actions such as calls in Horizon Europe may be able to push for mitigation actions in this area.

The FlexiGrid coordinator will set up a meeting with DG Energy sponsor to discuss possible actions.

Next follow up meeting with Sara

- A series of meetings, May to June, are set with a bi-weekly frequency to investigate obstacles further.

Other:

Sara suggests that all partners in FlexiGrid need to know that we are more than just an energy project. FlexiGrid is a climate mitigation project, supporting the transition into a sustainable future. A quote that was presented to the FlexiGrid partners, by the coordinator into at the Consortia meeting, 2021.

4.1.5 Interview with EIB Advisory Hub

FlexiGrid has had several meetings with EIB representatives regarding financial instruments and investment into flexibility markets. In the application phase, FlexiGrid identified that working need-owner financial instruments are important to scale energy flexibility systems in Europe and beyond. This is acknowledged by financial institutions as EIB, EIF, etc. Our SAT meetings with EIB representatives have rendered in a deeper understanding of the issues. The key-findings of the interviews were:

- Flexibility system is not known by the investment community. This creates uncertainty, which renders in longer time to deal and more expensive capital, due additional risk-premium.
- The size of investment into a working flexible market varies, it is not a standard investment such as wind and solar. The requested amount of capital may be too small for investor to engage in.
- There is an abundance of capital to invest in green and sustainable solutions. The investors are looking for bankable projects.

To overcome some of these obstacles the general suggestions are the following:

- **The investors should** bring in people from the industry in the due diligence process: avoid overestimating risk and make sure you understand the business model.
- **The project owners should** further strengthen the capacity to respond to the investors' requests regarding risks.
- **The investors and project owner should work against a** standardisation of flexibility project assessment – this would increase market readiness of projects and reduce due diligence cost.
- **The financial institutions should support availability of Technical Assistance instruments and Support development of National aggregation platforms.**

Suggested FlexiGrid actions based on information

Working against relevant and functional financial instruments is an objective of FlexiGrid. It is an activity that, if successful, would radically enhance deployment of flexible energy systems. The area should be of interest to all Bridge projects, as well as smart city project. FlexiGrid will continue the actions in the field by trying to join forces with Bridge, Smart Cities Market place etc. Joint workshops and knowledge transfer activities are set with Smart Cities Market place and FlexiGrid have had two meetings with DG Energy Project Manager of Storage and Energy, Irazoqui Cristobal. He suggested that the action should be coordinated through the Bridge Business Model task group. FlexiGrid, through the coordinator, has tried to set up a meeting regarding this matter and will continue this action in Q3 2021.

4.2 Reference groups and other events

4.2.1 Participation in an interactive ISGAN workshop

Background

In order to get wider feedback of the research in FlexiGrid from ISGAN knowledge community, the project partners participated in an interactive workshop on 'Power system flexibility from Local Energy Grids' organised for ISGAN Annex 6 by Joni Rossi (annex lead) and the Natural Resources Canada. The workshop focused on capturing flexibility from local energy systems, i.e., individual and connected distributed energy resources (including load and small generation) located in homes, feeders/neighbourhoods, and cities.

The objective of participating was to share and learn from results of research, development, demonstration, and pilot programs, strengthen the bond with partner projects in Europe, in Canada and the rest of the world, and to contribute to a white paper on the potential of flexibility and future directions for implementation. The partner project NESTNet was also participating in the workshop and presentations were given by several project partners: Joni Rossi (RISE), Magnus Andersson (IMCG Sweden), Anh Tuan Le (Chalmers University of Technology) and Kankar Bhattacharya (University of Waterloo). The pre-recorded presentations can still be viewed here:

<https://www.youtube.com/playlist?list=PLVQFc2zOj3J9suoD5YJ0tTawGWaJnX9QF>

The online workshop and discussion brought some interesting insights to the participating FlexiGrid members on the potential of local energy systems.

Outcomes

In the introductions it became clear that the topic of power system flexibility is highly important for ISGAN as well as other important actors, such as Mission Innovation, and that research projects such as FlexiGrid can contribute to gathering relevant insights.

The first session focused on the potential of flexibility resources. Characterisation of different loads in local energy systems was presented (building on work in WP3 of FlexiGrid) and it was identified that certain loads can provide flexibility for specific grid needs. Different components, such as demand response, microgrids, aggregators, or combinations of components were tested to provide services for local power balancing. Tested solutions are needed because there is a demand for a realistic evaluation of the flexibility potential in the distribution grids.

The next theme, bringing flexibility together, focused on worldwide experiences from demonstration projects and from existing local electricity markets. Existing networks already exist between for example Indian, American, European and Canadian projects, but workshop participants were eager to network and exchange information beyond this. The presentation of FlexiGrid was followed by an interesting discussion. The speakers presented recent advanced of technical developments and looked at the organisation of the markets and its regulatory challenges. All speakers stressed the importance of stronger cooperation (TSO-DSO alliances, private sector participation, community engagement and customer choice and control), but also the complications that could result from not addressing cooperation among stakeholders (for example when considering community versus individual demand or providing flexibility for different buyers). When bringing flexibility together, we should also be wary of ending up in silo thinking and instead also take into account other energy carries and sector coupling.

The speakers in the last session focused on market policies and planning approaches. Local markets, providing benefits for both energy networks and the larger society, are still facing different kinds of challenges. Local systems can be less efficient, and have less liquidity, which is not always the result of the lack of DERs but due to other (geographical) barriers such as visibility, size barriers to entry, and exclusivity to name a few factors. Solutions such as standardised products and optimised planning methods were presented. The speakers also discussed that the main enablers to foster the transition are not necessarily technical, rather related to regulatory barriers and incentives, removing uncertainty on benefits and increasing customer engagement. Governments could for example incentivise private investments in new flexibility in strategic network locations to facilitate.

Next steps

By becoming engaged in ISGAN events, an interesting knowledge exchange has started between different projects and networks, giving highly valuable input to FlexiGrid. The project plans to contribute to the white paper resulting from this workshop and to have the meeting with the Nest-Net project when travel is possible.

The dialogue continues with ISGAN annex 7 on 'Power System Transition'. Participants from RISE and Chalmers University will join a round table and discussion on 15th June 2021 on 'New Models for Flexibility Services in Power Markets - Actors, Markets, Technologies and Regulation'. They will also contribute to an ISGAN white paper with this topic.

The outcomes and takeaways of these ISGAN activities will be presented at the next consortium meeting.