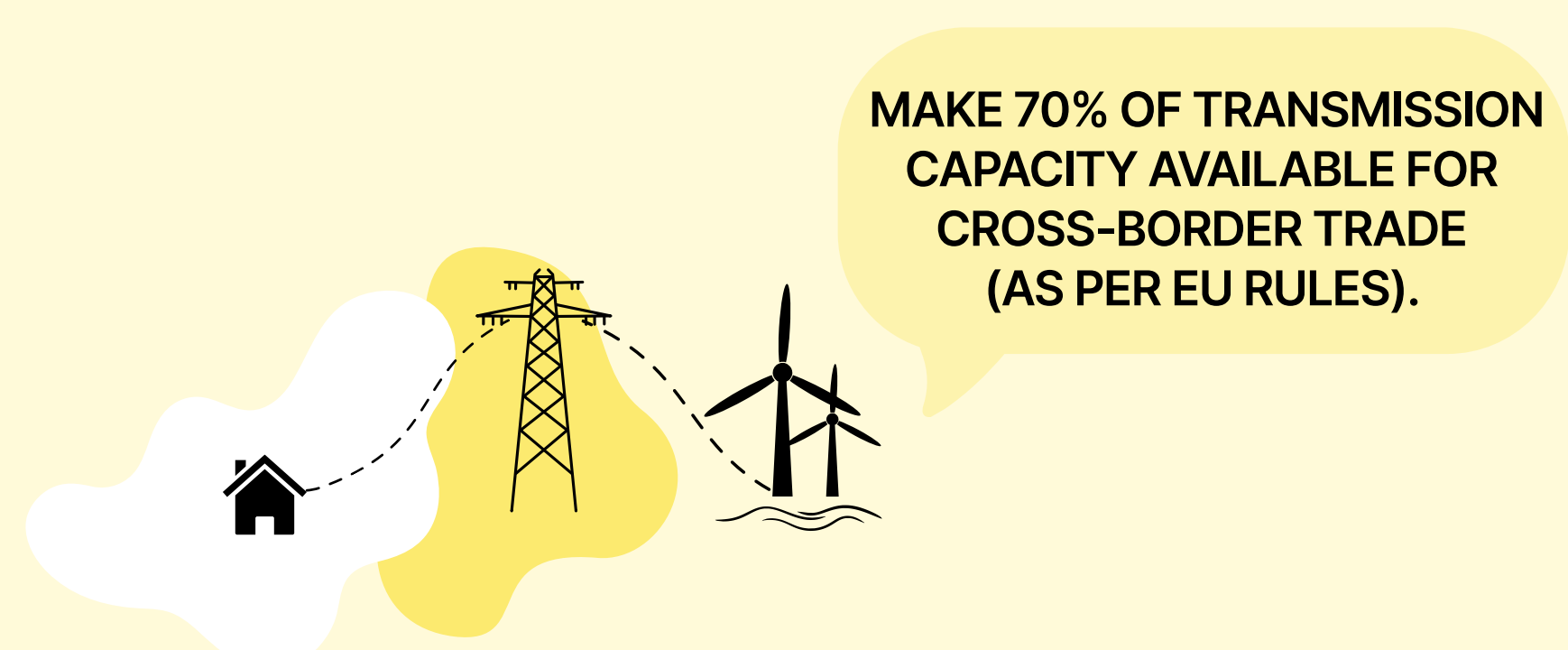


INCREASING CROSS-ZONAL CAPACITY AND FLEXIBILITY IN SOUTHEAST EUROPE

2026 Monitoring Report to the Energy Union Task Force

20.05.2026

ACER finds that the 2024 price spikes in Southeast Europe (SEE) were not just a one-off event but reveal deeper structural challenges in the region. ACER recommends 10 measures to increase cross-zonal capacities and system flexibility in the region.



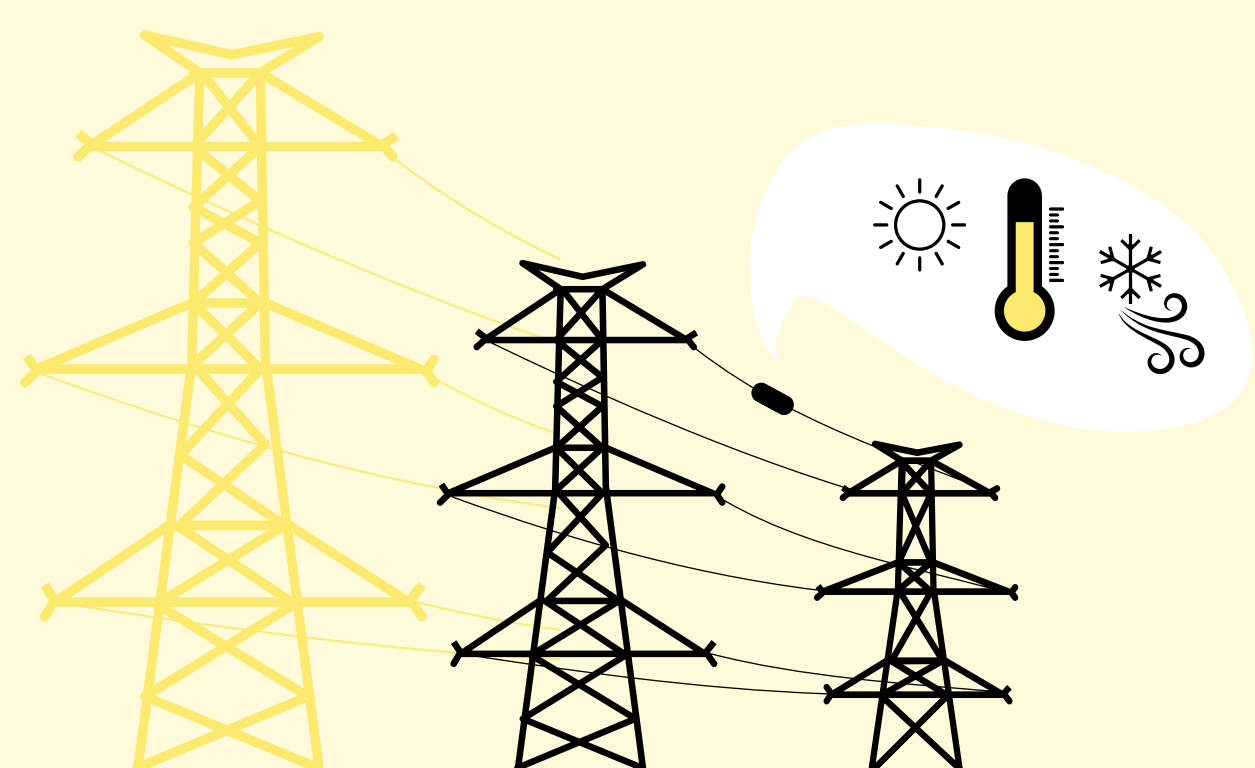
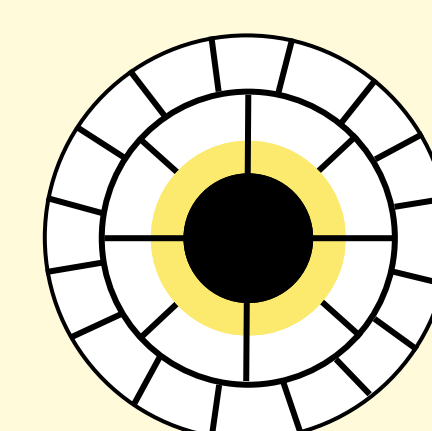
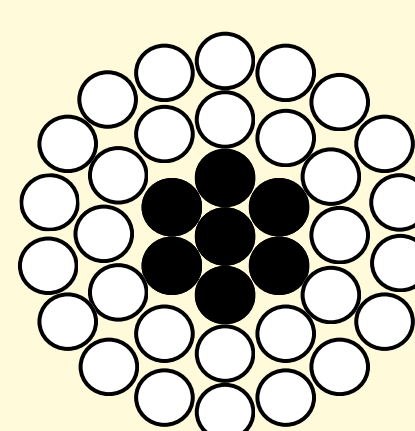
Why? So that domestic electricity trade is not prioritised over cross-border trade, to mitigate price spikes (like those in SEE) and unlock € millions in welfare benefits.

Upgrade standard power lines in congested areas with more advanced conductors.

STANDARD CONDUCTOR

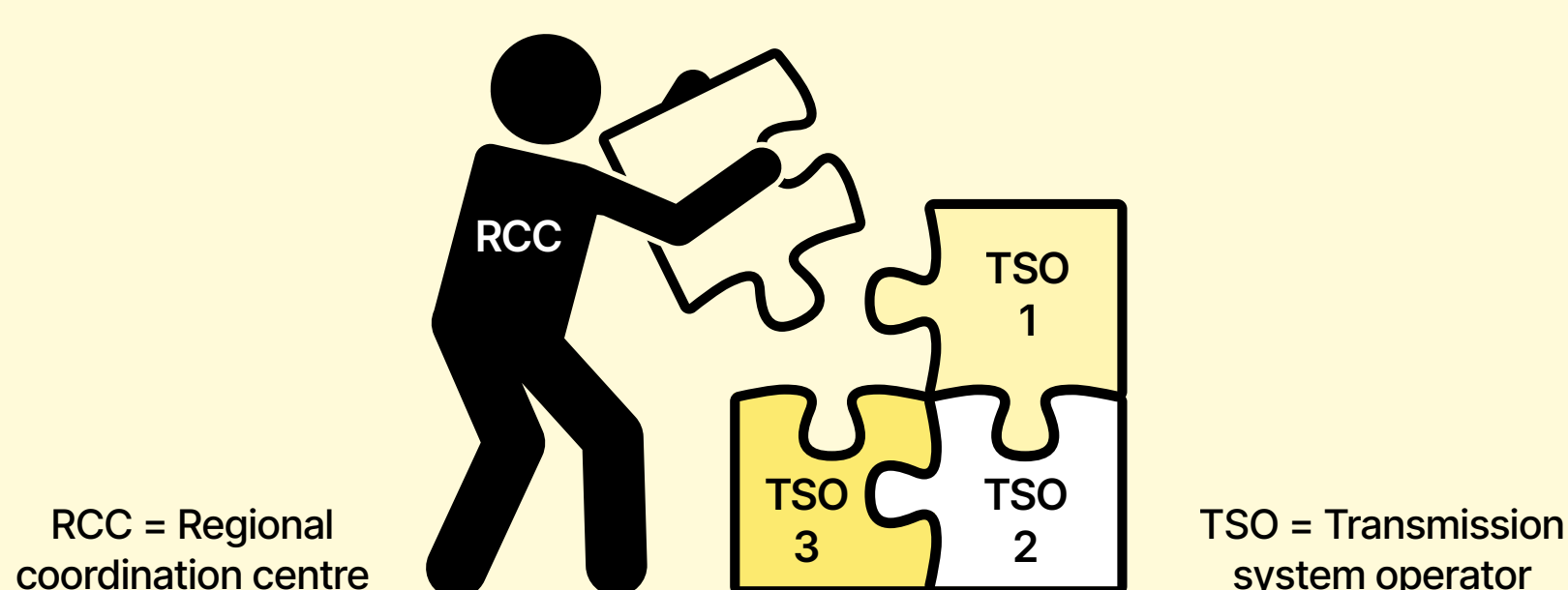
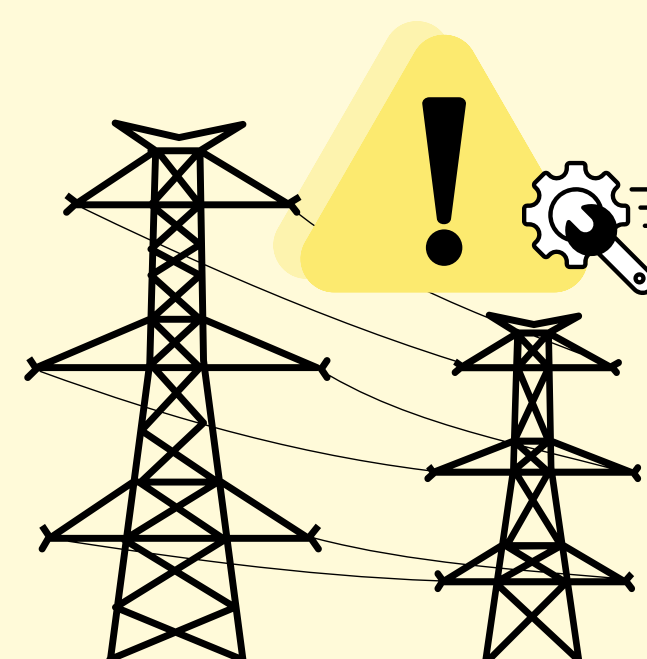
ADVANCED (HTLS*) CONDUCTOR

*High-temperature Low Sag



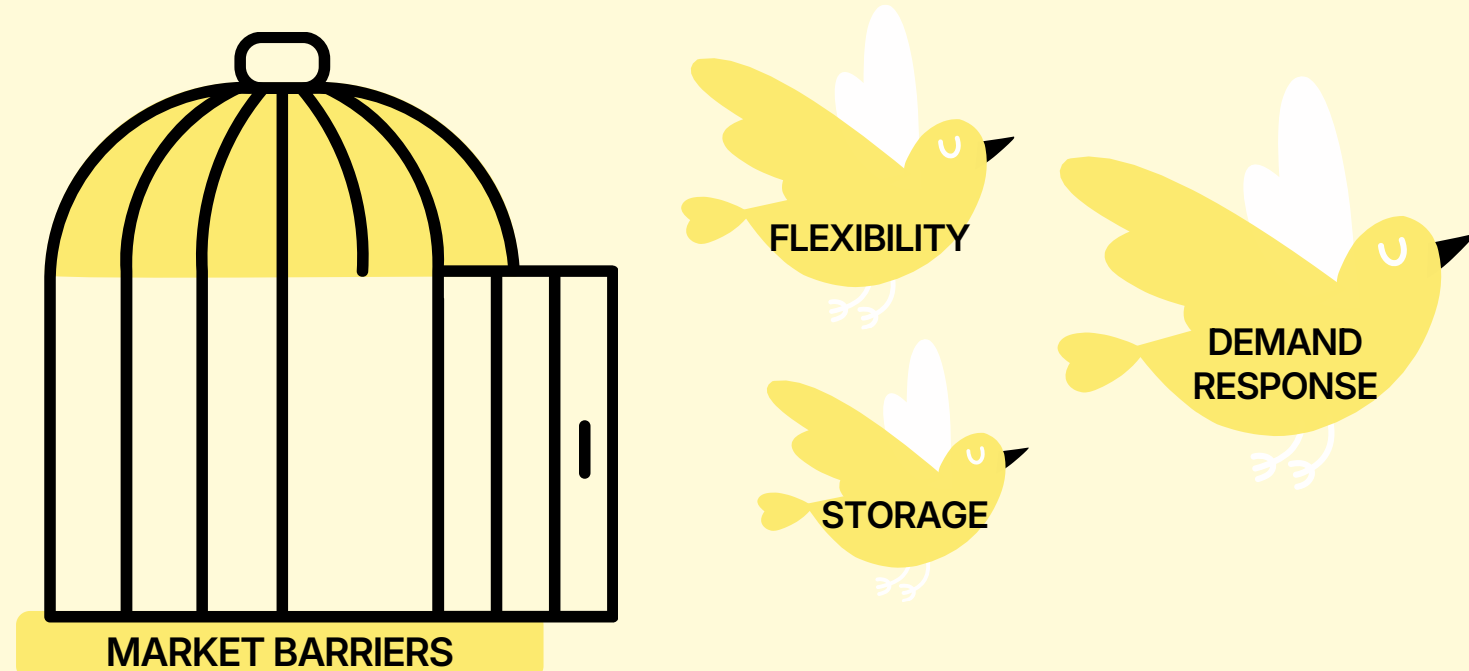
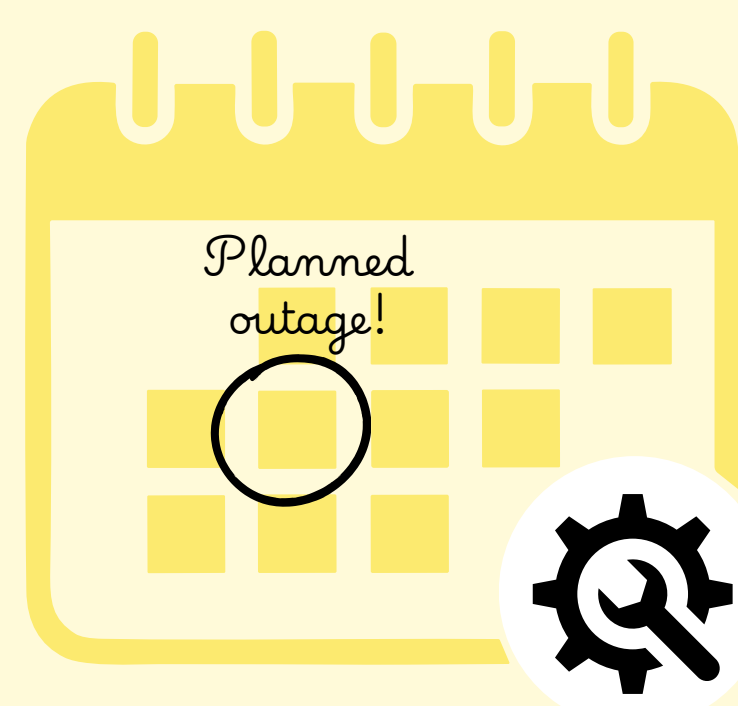
Prioritise the roll-out of dynamic line rating to better reflect actual grid capacity.

Consider the use of curative remedial actions (triggering the action only in the case of a grid failure), where beneficial, to complement existing congestion management practices.



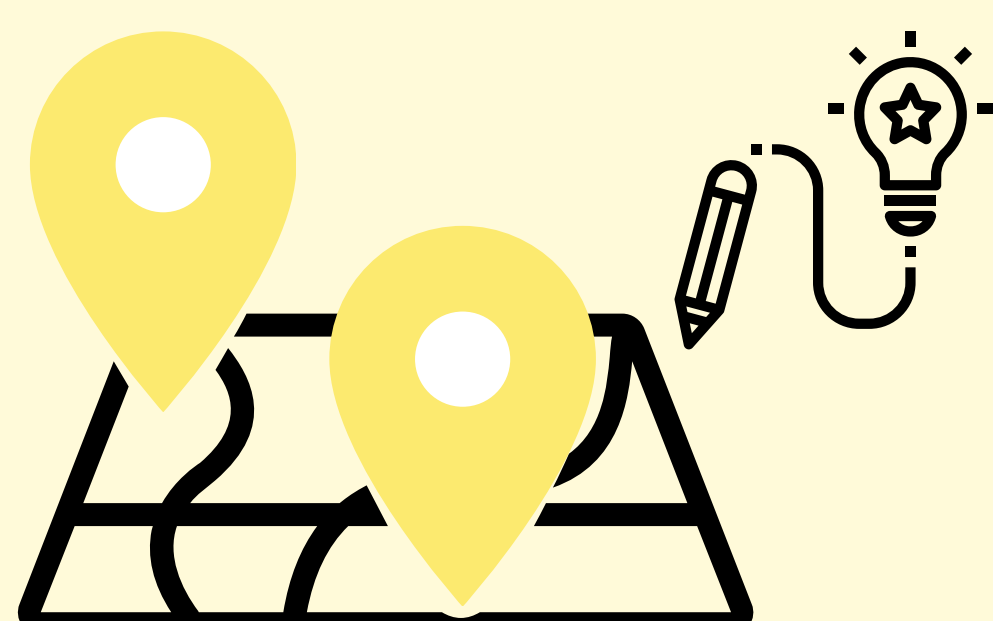
Improve coordination in network modelling to reduce uncertainty in capacity calculation.

Strengthen outage planning coordination to better account for the market impact of planned maintenances.



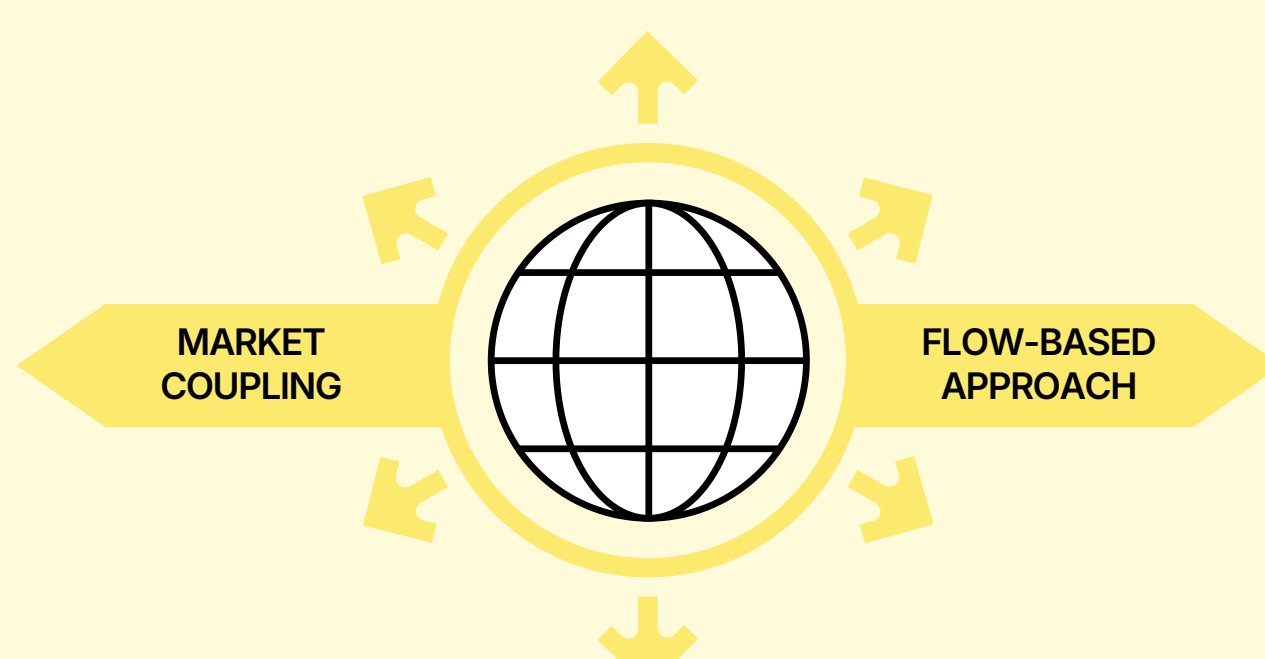
Remove market barriers to unlock demand response, storage and other flexibility solutions.

Accelerate network investments based on observed congestion patterns to strengthen regional interconnection.



Ensure bidding zones are well designed so borders reflect structural congestion in the grid.

Expand market coupling and flow-based approach across the region, including with non-EU neighbours, to improve cross-border trade.



EXPLORE THE UNDERLYING DATA

