

4th Meeting of the Expert Group on the EU-wide flexibility needs assessment

Tuesday 4 November 2025 | 09:30 – 13:00

Online, MS Teams

MEETING MINUTES (V2)

CHATHAM HOUSE RULES APPLY

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Leonard Goke	ETH Zurich
Mariya Trifonova	Sofia University
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Michal Cabala	Veolia Energia
Pawel Czyzak	Ember
Sophie Yule-Bennett	Energy Unlocked
Sylvain Quoilin	University of Liege
Tereza Stasakova	EC
Tom Brown	Technical University of Berlin
Yannick Perez	CentraleSupelec
Anna Mantelli	ACER
Christos KOLOKATHIS	ACER
Felipe Venegas	ACER
Leandro Lind	ACER
Riccardo Rosselli	ACER
Danko Vidovic	ACER

1. OPENING

The fourth meeting of the Expert Group ('the Group') on the EU-wide flexibility needs assessment in a virtual format was opened.

ACER introduced the meeting's objective, agenda and ground rules for the meetings. The agenda was approved by the Group.

2. PROJECT STATUS UPDATE & KICK START OF THE POLICY WORKSTREAM

A short presentation by ACER followed, introducing first topic of the meeting, namely, a short status update on the project and the presentation of the intend work plan for 2026.

One expert flagged that ACER should consider publishing in early 2026 the model that has been developed rather than wait for the publication of the EU-wide Flexibility Needs Assessment (FNA), planned for 2027. This would allow the modelling community to review and suggest improvements, if needed. ACER took note of the idea, noting that this will depend on the status of the development of the model.

The second topic of the meeting was the launch of the policy workstream of the EU-wide FNA project. ACER presented its proposed approach to satisfy the Agency's new mandate under Article 19(e) of the amended Electricity Regulation 2019/943, including the need to assess the potential introduction of measures to unleash flexibility.

To that end, ACER intends to develop up to two policy driven scenarios in addition to a 'central' scenario based on the input data taken from the national FNA. These additional scenarios intend to measure the impact of policy actions that can increase the flexibility within the European power system. One of these additional scenarios will represent a world where all barriers for non-fossil flexibility (i.e., storage and Demand Side Response (DSR)) are completely removed, namely the 'No barriers' scenario. The scope of the second additional scenario is still to be decided.

ACER then presented the conceptual framework it will follow to define the scope of the scenarios, identify and define the new assumptions and parameters underpinning them, noting the limitations for this first iteration of the EU-wide FNA. The floor was then opened for discussion.

Overall, experts agreed that the framework propose is logical but highlighted that the real challenge for ACER will be to translate it into actual numbers. Experts will be able to provide more detailed feedback then.

In relation to the 'No barriers' scenario, experts broadly agreed on its scope. However, it was flagged that modelling the removal of too many barriers would make difficult to identify which

was the most impactful one. One expert suggested a different approach for ACER to decide which barriers (and their removal) to model. Rather than selecting them ex-ante, the Agency could look first at the actual flexibility needs identified in the 'central' scenario and then identify the policy actions required to mitigate those needs.

It was also noted that ACER's scenarios should consider the future design of Capacity Markets (CM). CM might allow for non-fossil flexibility to participate, providing another route to market and potentially affect the actual flexibility needs of the power system. ACER acknowledged the point, reminding the Group that such considerations should be already reflected in the assumptions of the national FNAs.

Experts were then asked to indicate what would be the most important barrier for non-fossil flexibility to be removed. Several experts provided suggestions, ranging from lack dynamic retail pricing, barriers preventing the formation of local flexibility markets, lack of behavioural response in customers. One expert also flagged that ACER should not be focusing on alternative scenarios that look at specific technologies to avoid pre-emptively 'picking winners' on potential solutions to flexibility needs.

After a short wrap up, this first session of the meeting ended.

3. MODELLING SESSION

The second half of the meeting focused on modelling topics. First, ACER provided a summary of how the feedback provided by experts provided throughout the year has been integrated in ACER's work. Then, the conversation moved on the two main topics: ACER's proposed approach to test and validate the model required to perform the EU-wide FNA, and the computation of the flexibility indicators.

Model testing and validation

ACER presented its approach to validate and test its model. This is based on three levels of testing: (i) detailed unit testing, ensuring that each modelling feature works as intended; (ii) system testing, ensuring that the model works as intended as a whole; (iii) historical back-testing, ensuring that the model generates results comparable to historical data. The floor was the open for discussion.

No major concerns were raised on the proposed approach. Experts highlighted how calibration of the model for back-testing can be quite complex, especially when must-run plants are considered. They suggested to focus on the Day Ahead market timeframe, looking at KPIs such as the activation and dispatch of specific units (e.g. OCGT, DSR, storage). It was highlighted how looking at prices can be misleading in such an exercise. One expert noted that it will be challenging to back-test the EU-wide FNA model using historical data considering there are not many studies that have model demand-side flexibility.

ACER note all the suggestions and thanked experts offering support in model calibration for back-testing.

Computation of the flexibility indicators

In the second part of the modelling session, ACER presented its approach to compute the flexibility indicators in alignment with the FNA methodology, followed by an open discussion with experts.

The conversation focused primarily on the Renewable Energy Sources (RES) generation curtailment indicator, which measures the level of curtailment of RES in the market against the national RES curtailment target set by each Member State. To compute this indicator, ACER proposes the introduction of a representative, technology-neutral 'dummy storage' to be used to measure the additional flexibility required to integrate more RES and to meet the national curtailment target. ACER also stressed that it will be possible to measure the contribution of interconnection between Member States in meeting curtailment targets.

Experts asked for clarifications on the techno-economic parameters of the dummy storage, debating on whether information such as CAPEX and OPEX for the dummy storage itself should be included in the modelling.

On the one hand, the FNA methodology requires the dummy storage to be only representative. Including information about costs would lead, to a certain degree, to its characterization. On the other hand, one expert argued, excluding these parameters would not provide information on the actual costs of deploying flexibility resources compared to the cost of curtailment. It was also noted that not all types of flexibility resources would be able to meet the need identified by this indicator.

Clarification questions were also raised about whether the dummy storage would cover also seasonal flexibility needs, on RES curtailment assumptions used in the model and whether indicators will differentiate between capacity and energy flexibility needs.

Finally, one expert flagged that the FNA flexibility indicators are going to be of limited use to power system operators as they are not describing the actual needs from a system perspective. It was suggested that ACER will have to clearly indicate the use and value of these indicators in its messaging.

4. CLOSING SESSION

The ACER team provided experts with information on the next steps and the topic of the next meeting of the Group. Specifically, ACER will:

- share the meeting minutes for experts' review;
 - share an online form for experts to provide any additional feedback on the questions asked;
 - collect questions that were not answered during the meeting and provide written responses.
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