

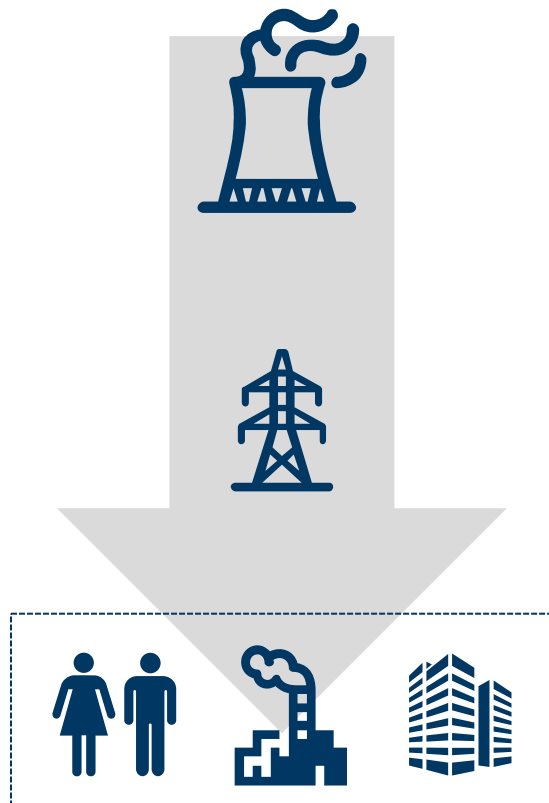


Electricity transmission planning

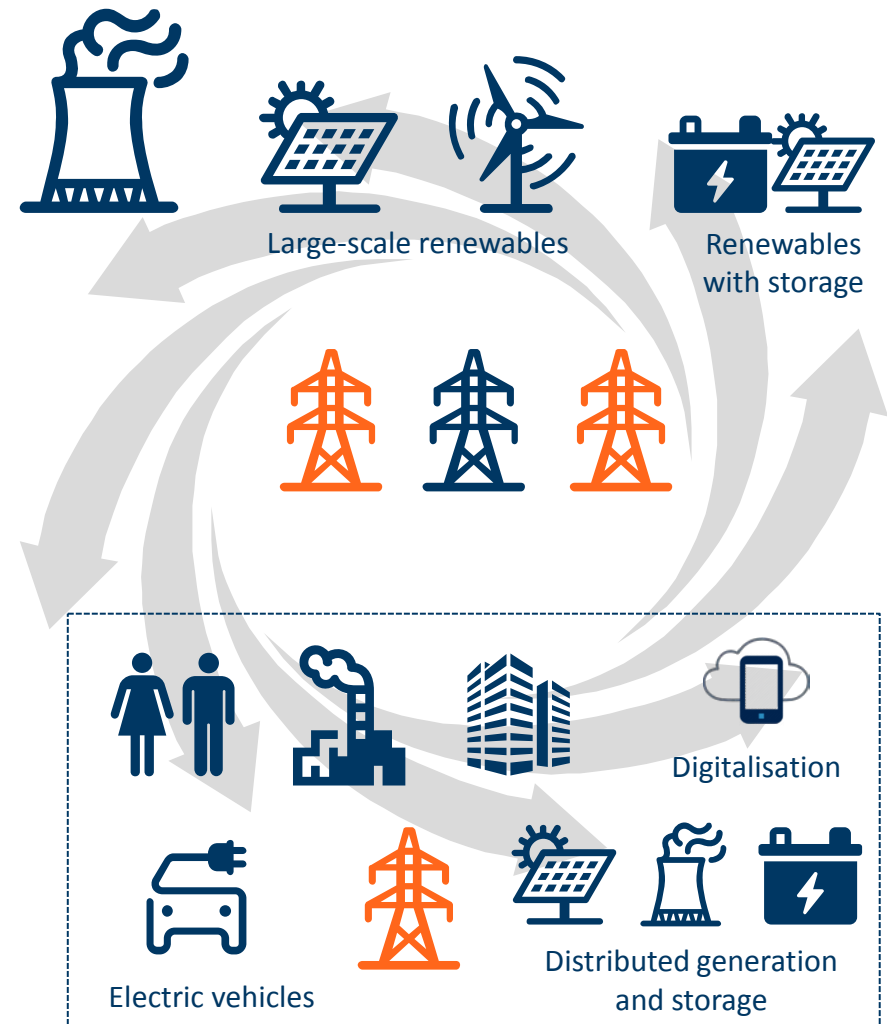
A perspective from Australia and the US

The 'energy trilemma' is common across the world, now with the added challenges of decentralisation and digitalisation

Traditional one-way power flows...



...are increasingly replaced by complex flows



US and Australia face the same problems of technological change and intermittency, but the approaches to planning differ significantly

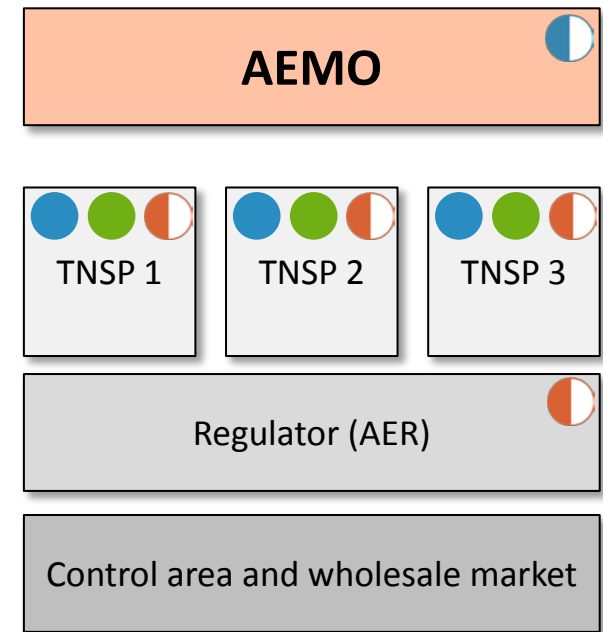
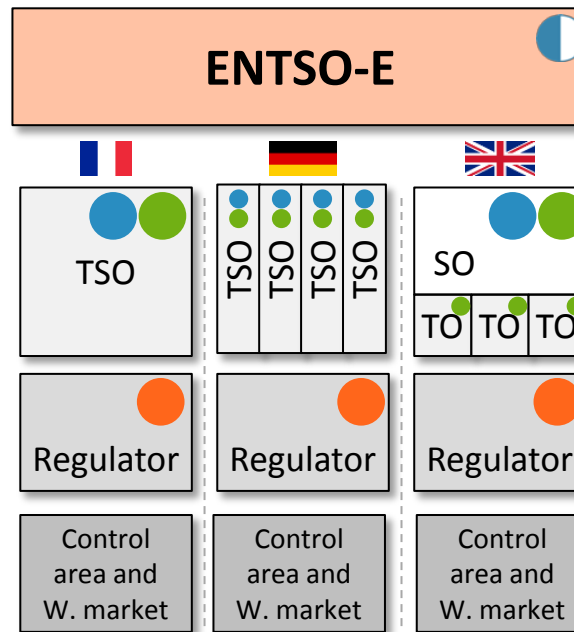
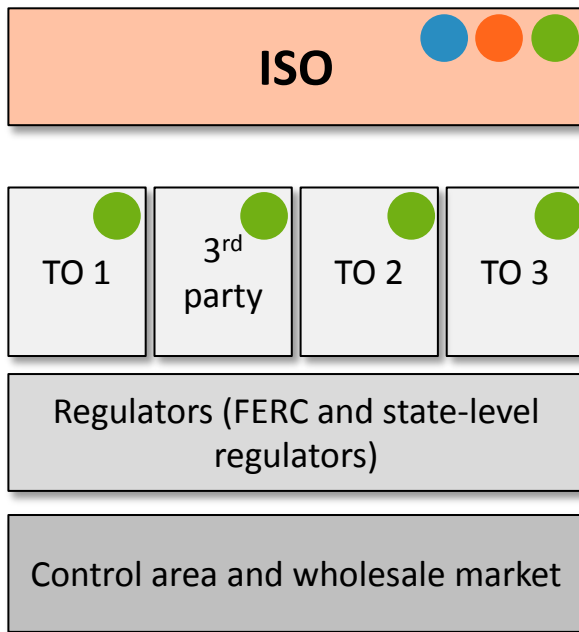
US ISO model



Europe



NEM



Legend:



Scenario development and identification of system needs



Optioneering and identification of possible solutions



Decision-making on the preferred solution

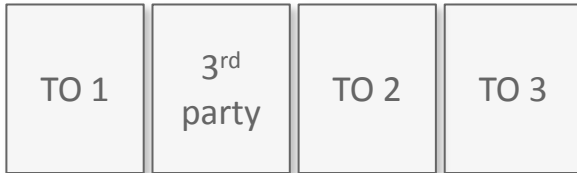
Market design can be adapted to improve outcomes, but policy makers need to make a concerted effort to deliver change

US ISO model



Incentives for ISOs to be less conservative?

ISO



Regulators (FERC and state-level regulators)

Control area and wholesale market

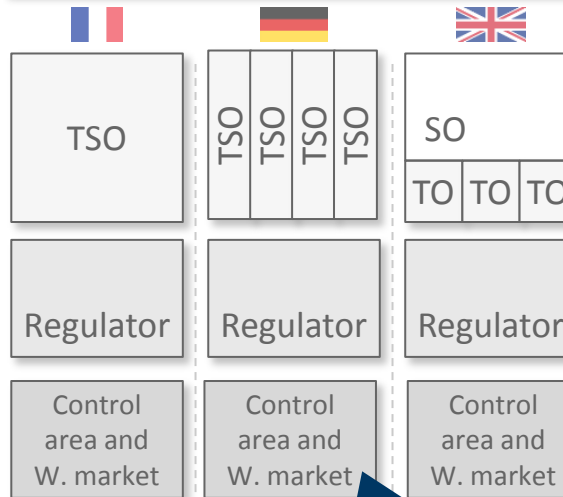
Improved coordination between ISOs (e.g. FERC Order 1000)?

Europe



Pan-European system operator?

ENTSO-E



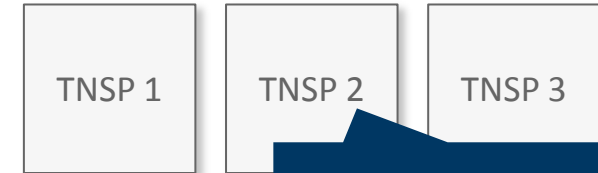
LMPs or more granular price zones?

NEM



Stronger role for AEMO in coordinating stakeholders?

AEMO



Regul

Control area and wholesale market

Greater role for non-TSO Tx developers?



Any questions?



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