

Energy in South Korea

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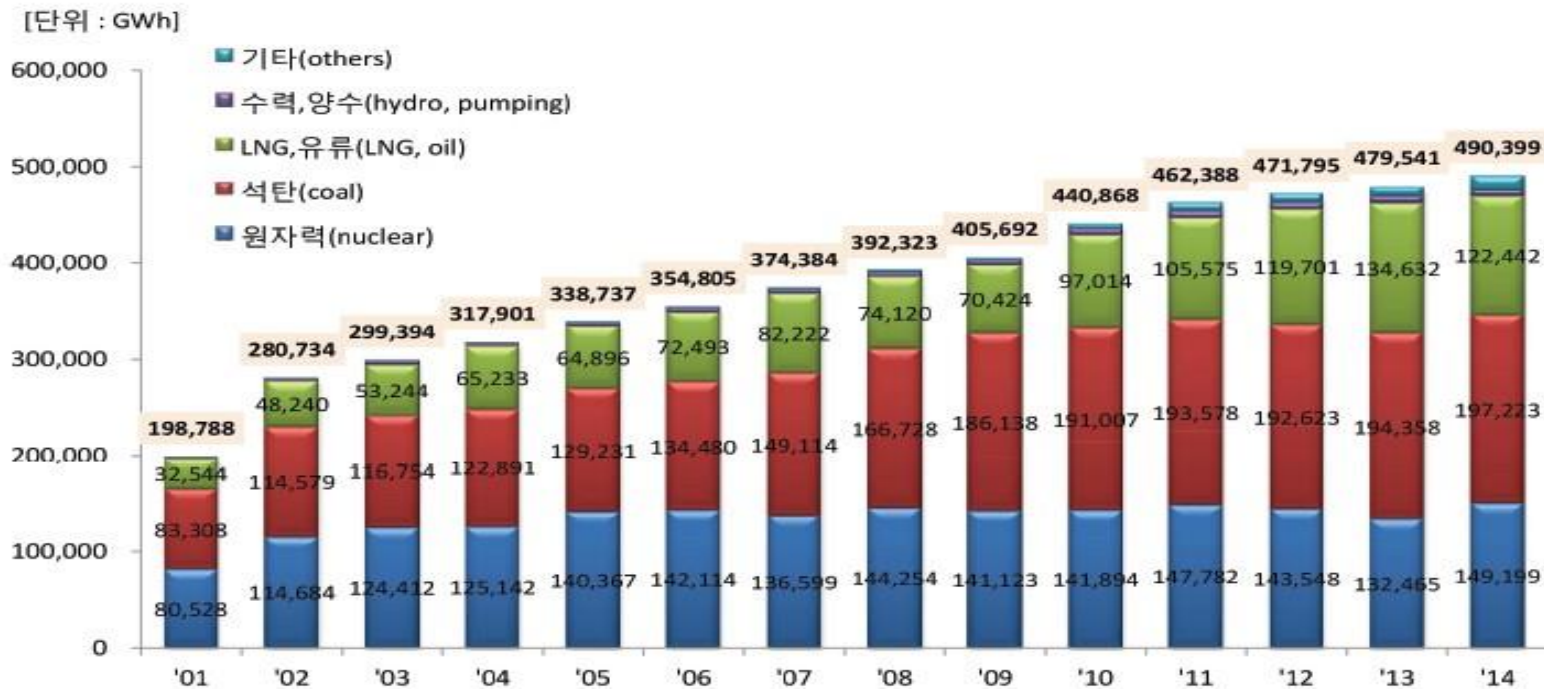
Summary

- Background
- Privatisation and liberalisation in energy sector
- History of struggle over public nature of energy
- Challenges for public movement for energy democracy

Background: energy sources

- Trade Volume(Electricity)

전력시장 전력거래량
(Trade volume)

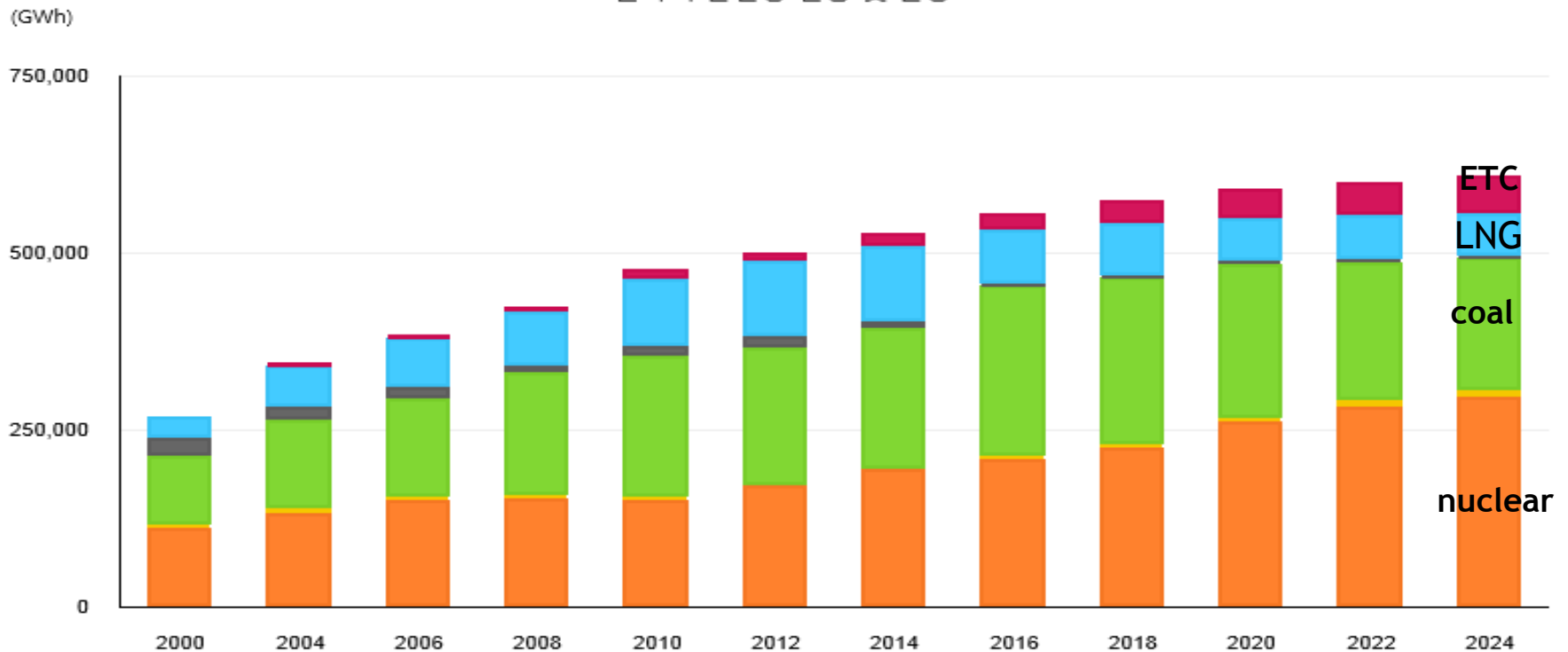


- Coal > Nuclear > LNG

Background: energy sources

-Planned Generation Quantity

원자력 발전량 현황 및 전망



- Nuclear ↑

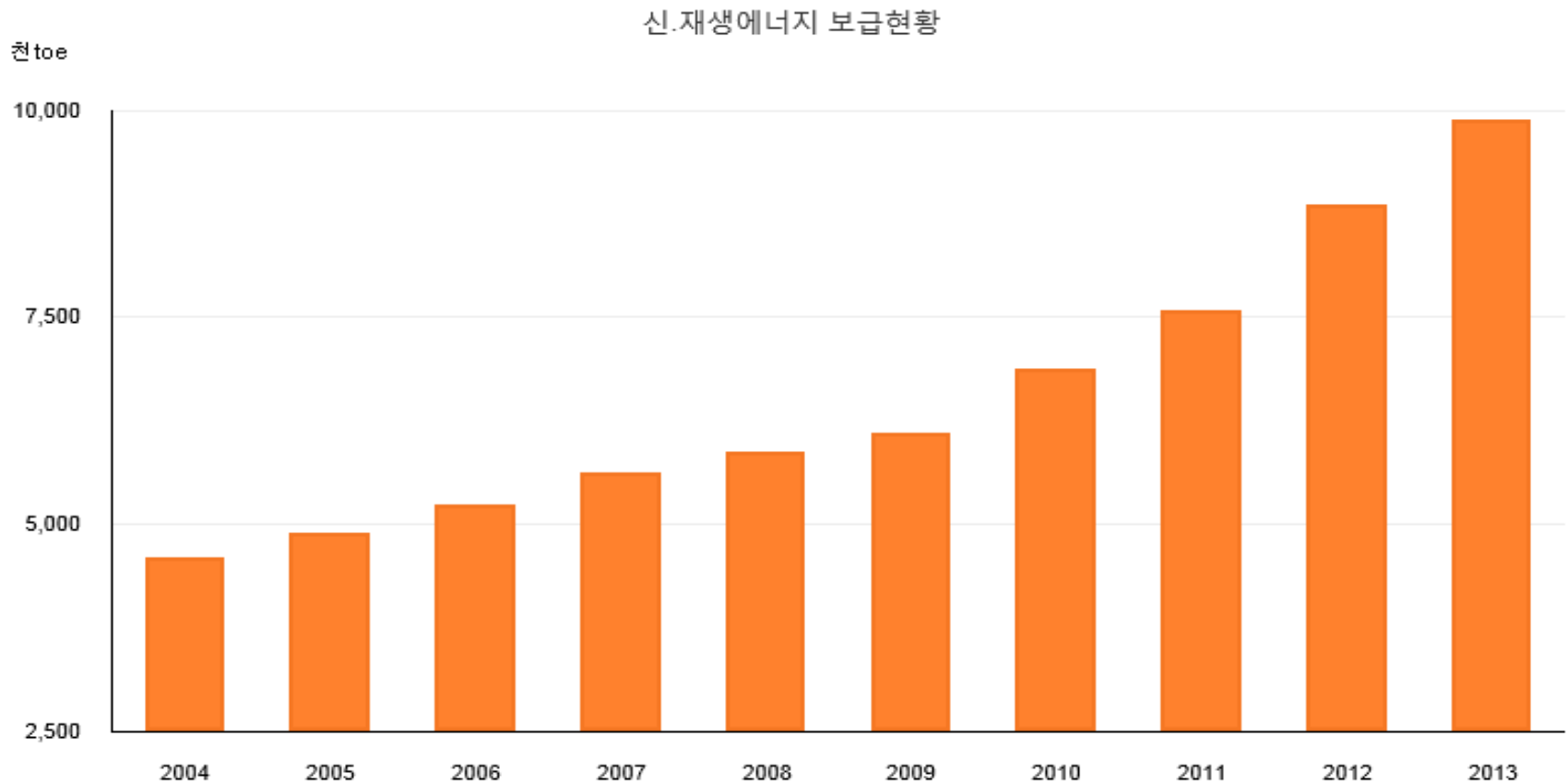
Background: energy sources

- Natural Gas Consumption

Year	Total	Household, Industry		Power Plant	
		consume	share	consume	share
2003	1,845	1,198	64.9%	647	35.1%
2004	2,132	1,250	58.6%	882	41.4%
2005	2,313	1,403	60.7%	910	39.3%
2006	2,445	1,396	57.1%	1,050	42.9%
2007	2,652	1,445	54.5%	1,208	45.6%
2008	2,727	1,532	56.2%	1,195	43.8%
2009	2,604	1,563	60.0%	1,041	40.0%
2010	3,281	1,771	54.0%	1,510	46.0%
2011	3,540	1,862	52.6%	1,679	47.4%
2012	3,829	2,011	52.5%	1,818	47.5%

Background: energy sources

- New-Renewable Energy Supply



Background: energy sources

- New-Renewable Generation Capacity (2014yr/MW)

	bio-gas	gas	land fill gas	solar	waste	wind	fuel cell	ocean energy	Total
capacity	81.2	1,758.6	69.2	1,050.4	4,193.1	640.8	164.8	255.3	8,213.4

Background: ownership

Electricity	Gas
<ul style="list-style-type: none">-Transportation/Distribution<ul style="list-style-type: none">-> Kepco(public) 100%-Generation<ul style="list-style-type: none">-> 6 Kepco Subsidiary(public)-> others(private)	<ul style="list-style-type: none">-Whole Sale<ul style="list-style-type: none">-> Kogas(public) 100%-Retail sale<ul style="list-style-type: none">-> 32 private compay (locally based, monopoly)

Background: ownership

- Private-owned Power Plant

company	POSCO Power	GSEPS	K-Power	MPC YULCHON POWER	MPC DAESHIN POWER
The date of incorporation	1999	1996	1997	2009	2009
regeon	Incheon	Dangjin	Kwangyang	Sunchoen	Daesan
Rating, MWe	1,800	1,088	1,074	577	507
fuel	LNG	LNG	LNG	LNG	petroleum
Ownership	POSCO 100%	GS 70% Oman Oil Compny 30%	SK 100%	MPC Korea Holings 100%	MPC Korea Holings 100%

Background: ownership

- Recent privatisation of power plant(coal)

year	company	Rating, MWe	fuel
2010	STX: Donghae	1,000	coal
	Donbu:Dangjin	1000	
2012	SK:Samcheonpo	2000	
	Samsung: G project	2000	
	Dongyang: Shin-Taebaek	2000	
	Dongbu: Hasla	2000	

History of struggle over public nature of energy

- 바. 1) Changes in privatization policy and development in struggle for the public nature:
 - starts with government in 1990s, strengthened by IMF after 1998 crisis
 - Privatised steel, heavy industry, telecom to chaebols
- 사. 2) Resistance to unbundling and privatisation of rail and power sectors
 - growth of labor unions in public sector, strike of 2002
 - mind changes of the general public over public rights, ownership control
- 아. 3) Halting privatisation and unbundling in 2000s
 - 2004 agreement between govt/employer/unions to halt privatisation and unbundling in power and gas sectors (after international visits, including to Greenwich)
 - Aug. 15, 2008, after mass public protest president Lee, Myung Bak announced the end of privatization policy in power, gas, healthcare, and water through the national dialogue
- 자. 4) Return of privatization as ‘competition’ ‘normalization’ ‘advancement’
 - public resistance now much lower: less immediate effects, government attacks public sector workers
 - unions and NGOs fail to develop new decentralized democratic model for future public sector
 - Unions not interested in renewable energy

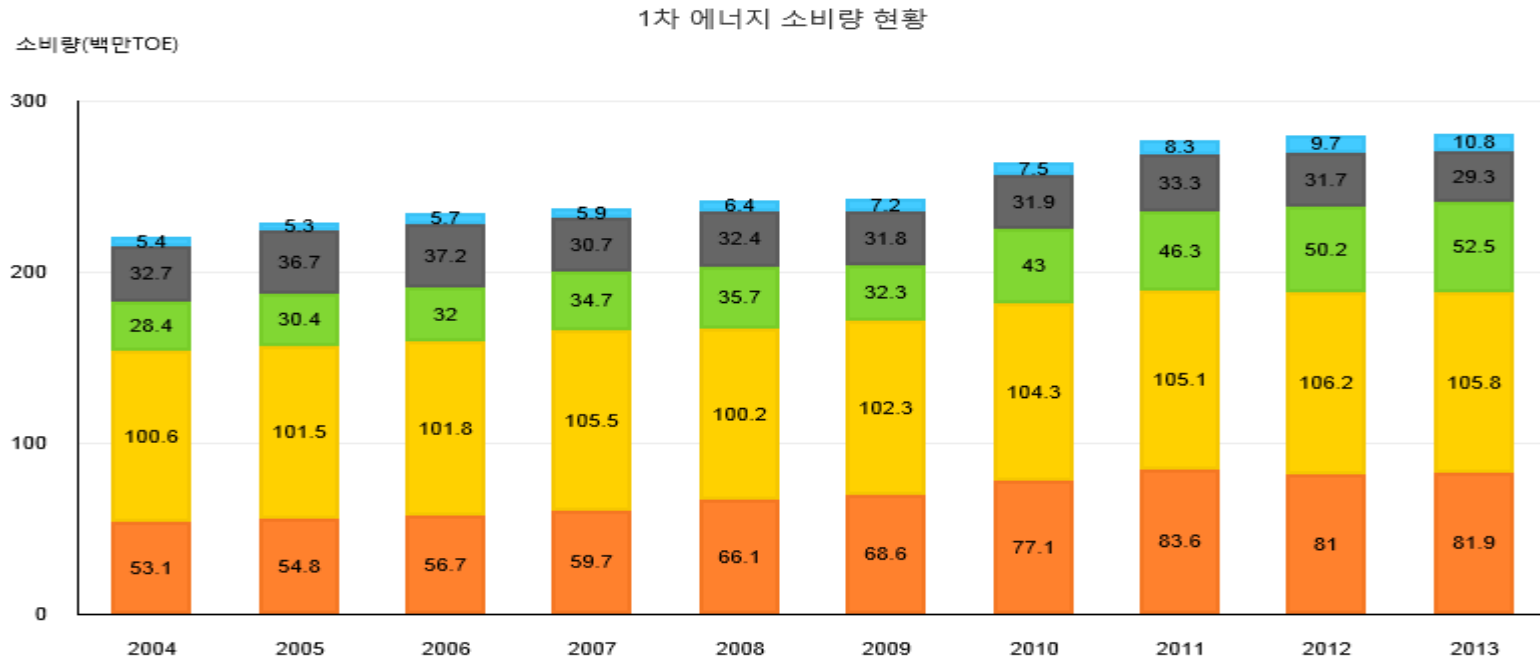
Challenges for movement for public energy

- 카. 1) Democratic control in operation and policy decision: ‘beyond ownership’
- 타. 2) Universal access to affordable energy (and water): human rights
- 파. 3) Climate change currently seen mainly as ‘north-south’ issue, should develop case for renewables through public policy, also for energy security: ‘energy democracy’

Annex

Background: energy sources

Total Primary Energy Consumption

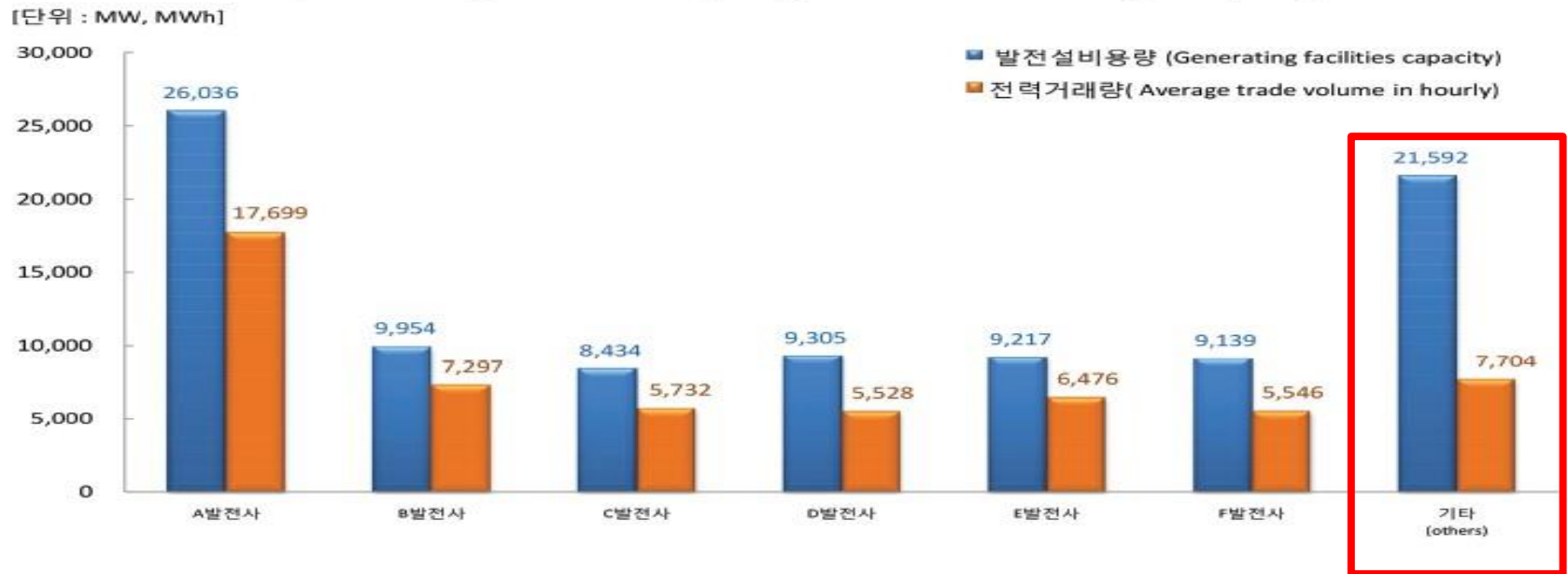


(2013yr) Oil>Coal>LNG>Nuclear>etc..

Background: ownership

- Generating facilities capacity & Trade volume

회원사별 발전설비용량과 전력거래량
(Generating facilities capacity & Trade volume by company)



- [Private sector]

Private

capacity(almost 23%) -> (after 5 years) 30-35%