



The Leading German Energy Providers and the Transformation of the German Energy Sector

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Structure

1. Research Questions
2. Methodology
3. Theoretical Framework
4. Interim results

Research Questions

- Which strategies do the established German energy providers use to react on the changes in their environment through the liberalization of the German electricity market and the German energy transition?
 - How did they perceive the decisions made by the federal Government – primarily as a threat or an opportunity?
 - Did they begin making organizational changes to cope with the changing environment?
 - What new or innovative measures have been enacted?
 - Can attempts towards a new coalition building be detected?
- To which extent are there differences/similarities in the chosen strategies?

Methodology

Content analysis

- 1903 documents
 - reports by the companies
 - business papers
 - daily or weekly newspapers
- Expert interviews
 - so far two. More interviews planned

Theoretical Framework

- Main aspects of interest:
 - Interrelations between organizations and their environment
 - Adaptability vs. Inertia of organizations in changing environments
- Used theories:
 - Neoinstitutional field theory (Scott etc.)
 - Path dependency (Sydow etc.)
 - Socio-technical transitions (Geels etc.)
 - Transformative capacity of new technologies (Dolata etc.)

Theoretical Framework

- Open theoretic questions:
 - What happens when the lock-in of an organization becomes apparent? How can organizations get locked-out?
 - How do organizations react on changes in their environment that occurred without their participation?
 - The impact of (regulative) legal changes on organizational fields

The „Big-4“

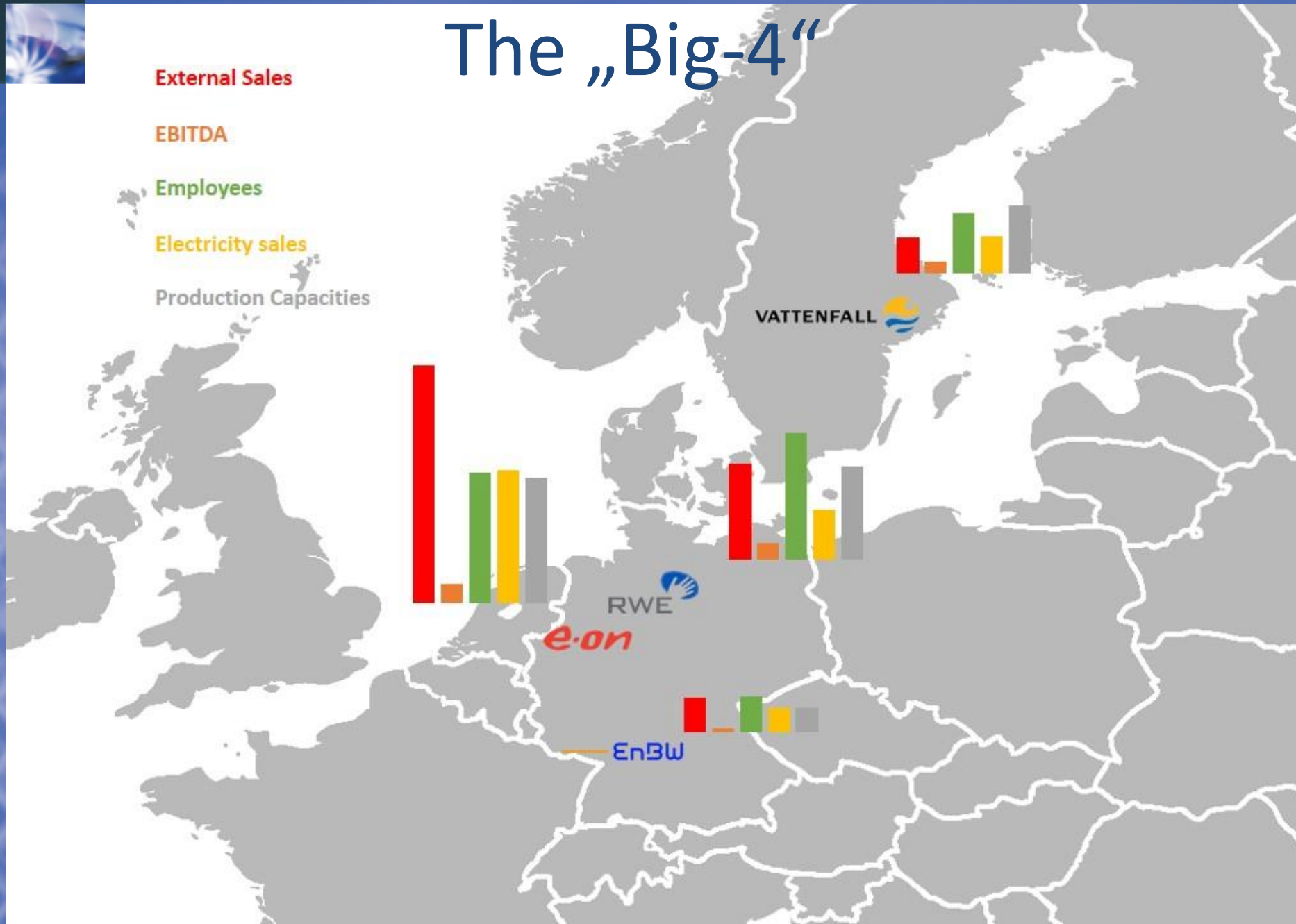
External Sales

EBITDA

Employees

Electricity sales

Production Capacities



The current situation

1. Two lines of regulatory changes led in profound changes in the German energy sector
 1. Market liberalization 1998
 2. German energy transition 2000
2. The growing amount of renewable energies in Germany became a significant threat to the established business models of the companies
3. Now in phase of reorientation

Reconstruction of actions by the companies between 1998 and 2012 – Strategic phases

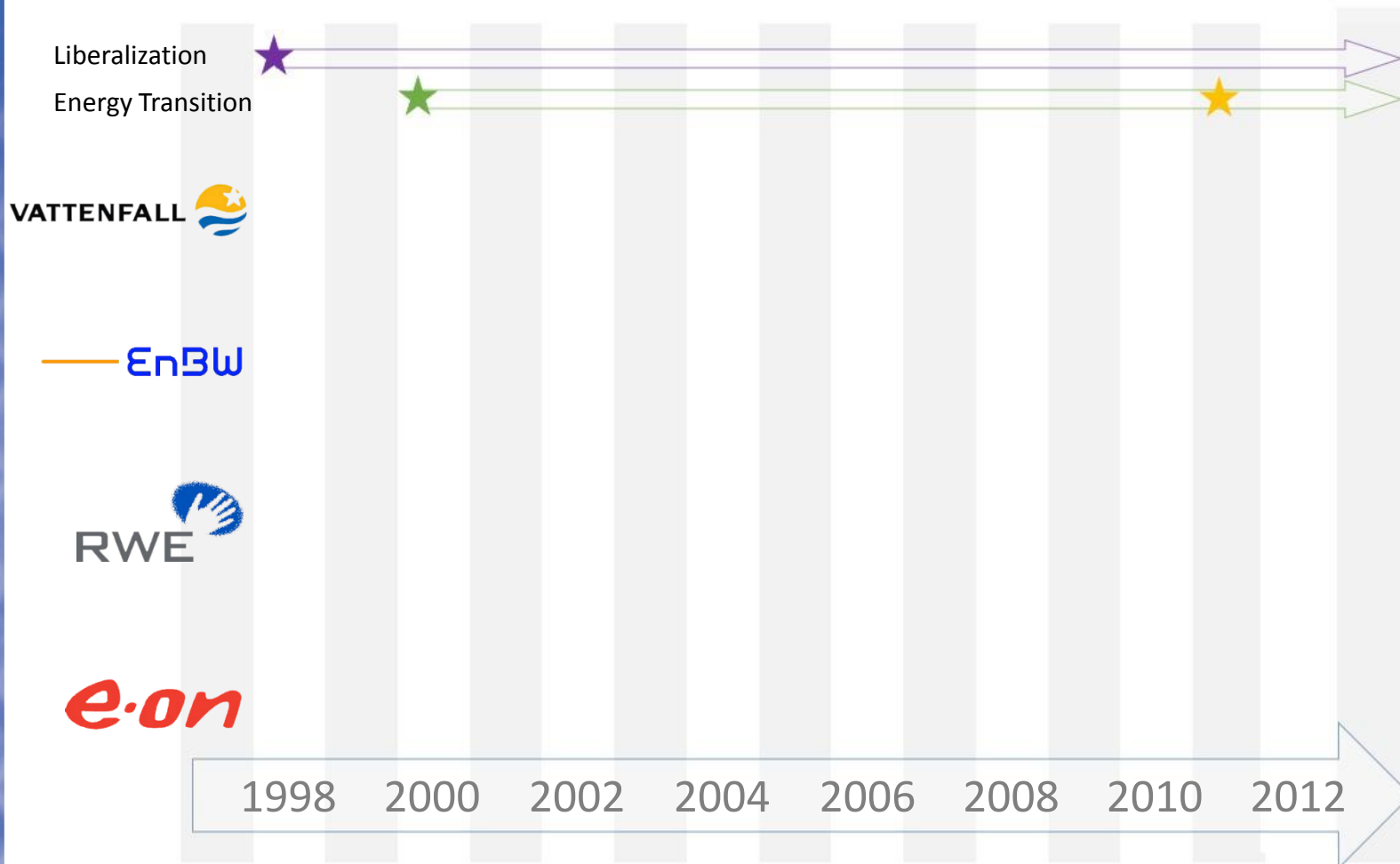
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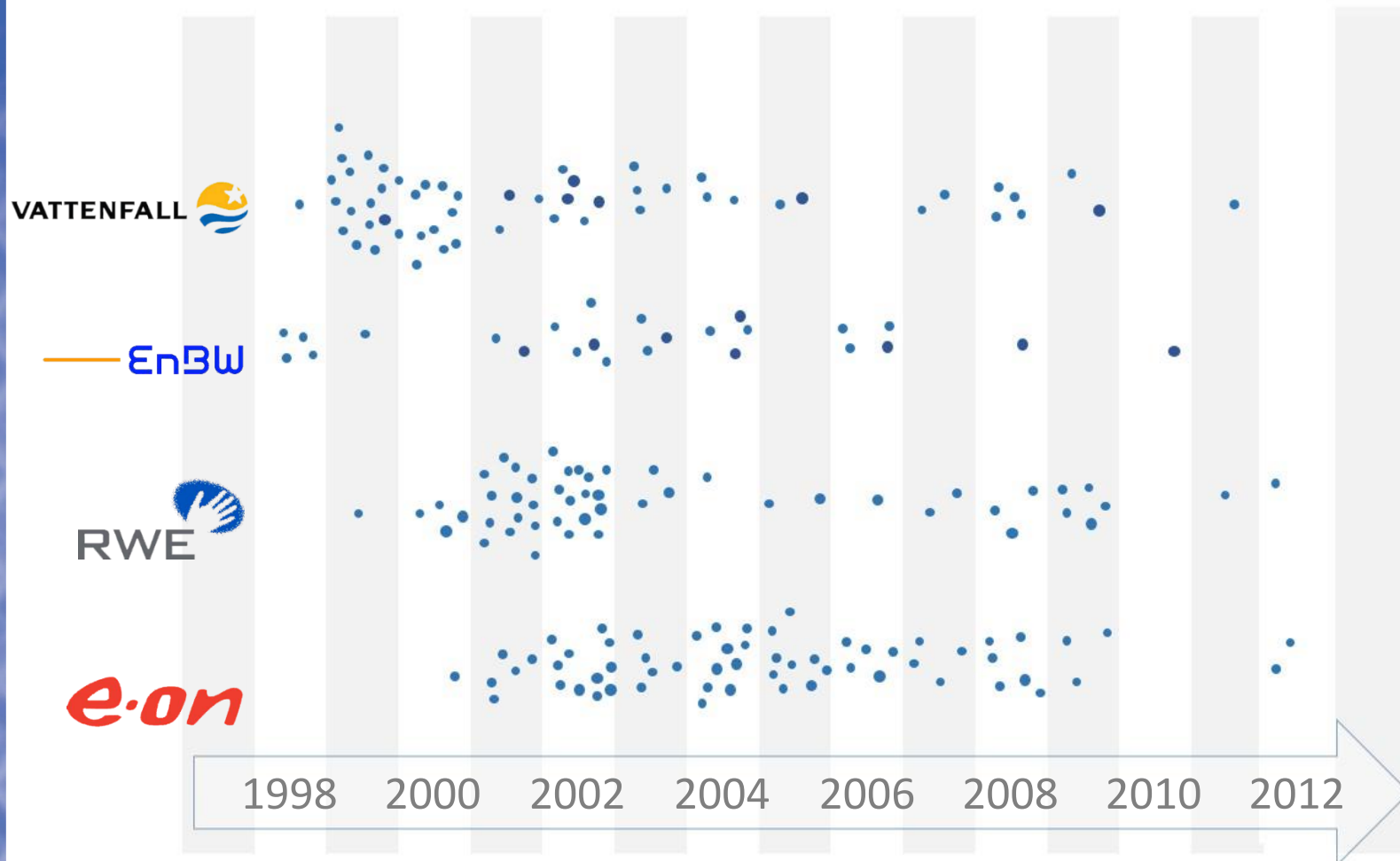
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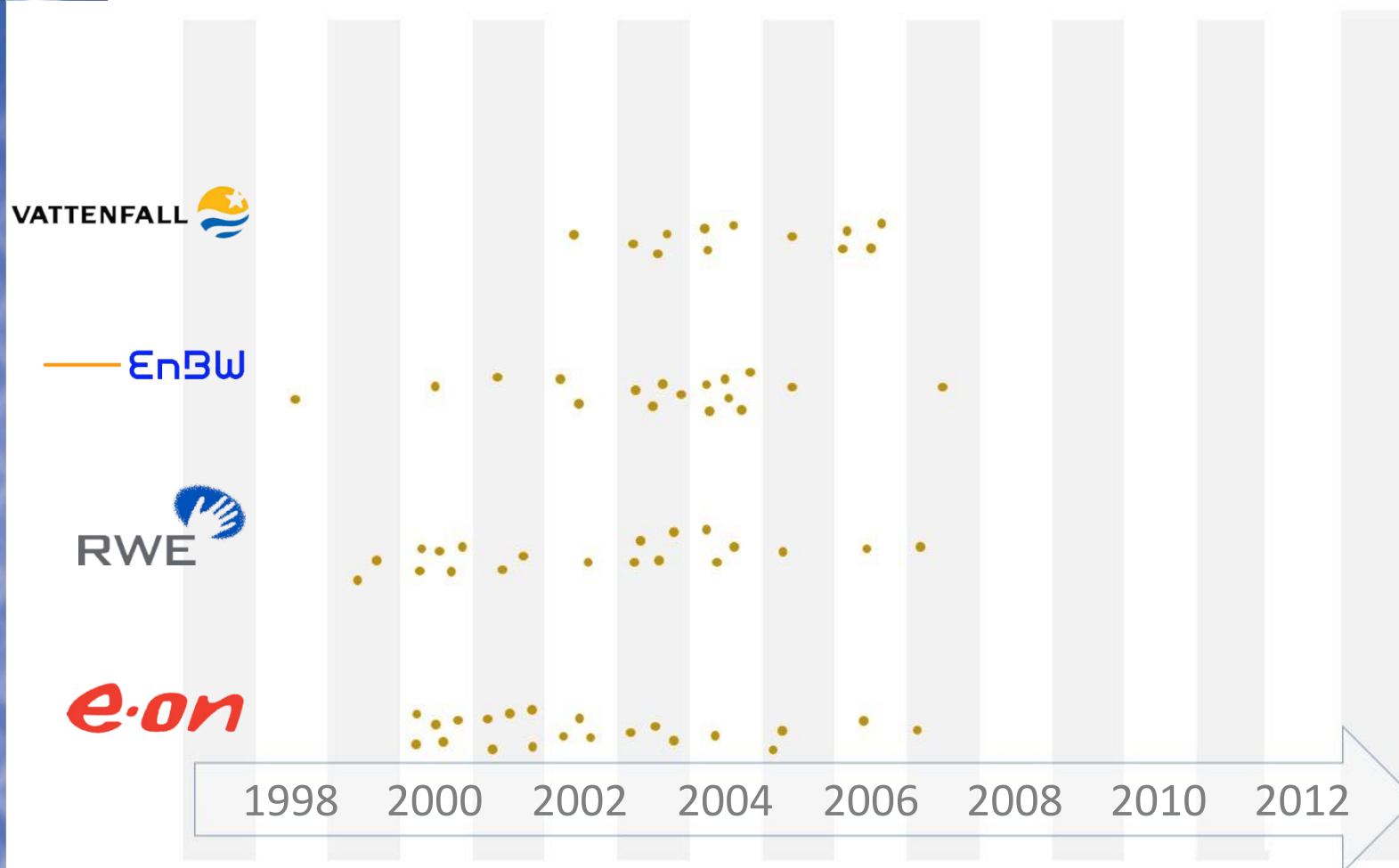
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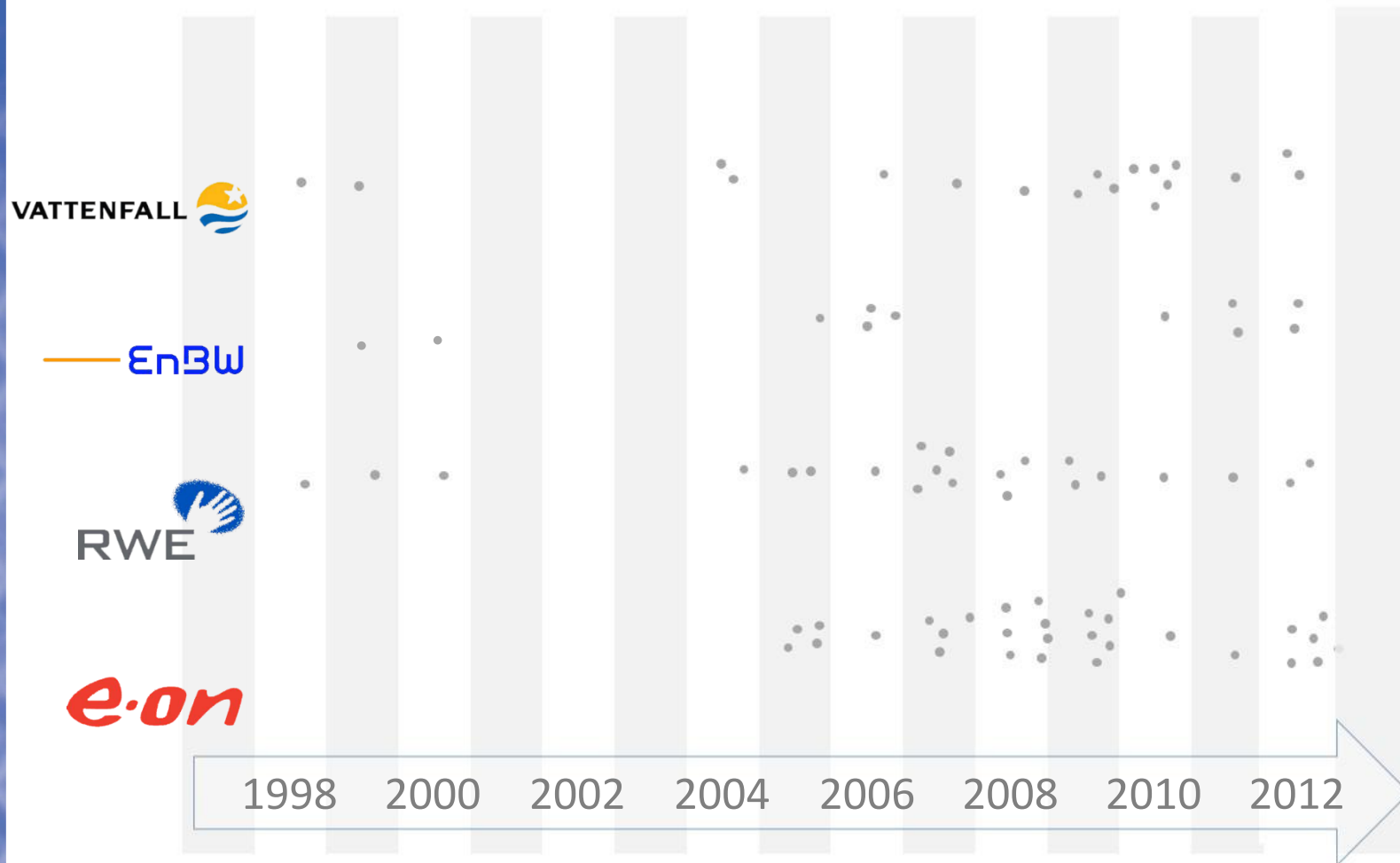
1998 2000 2002 2004 2006 2008 2010 2012

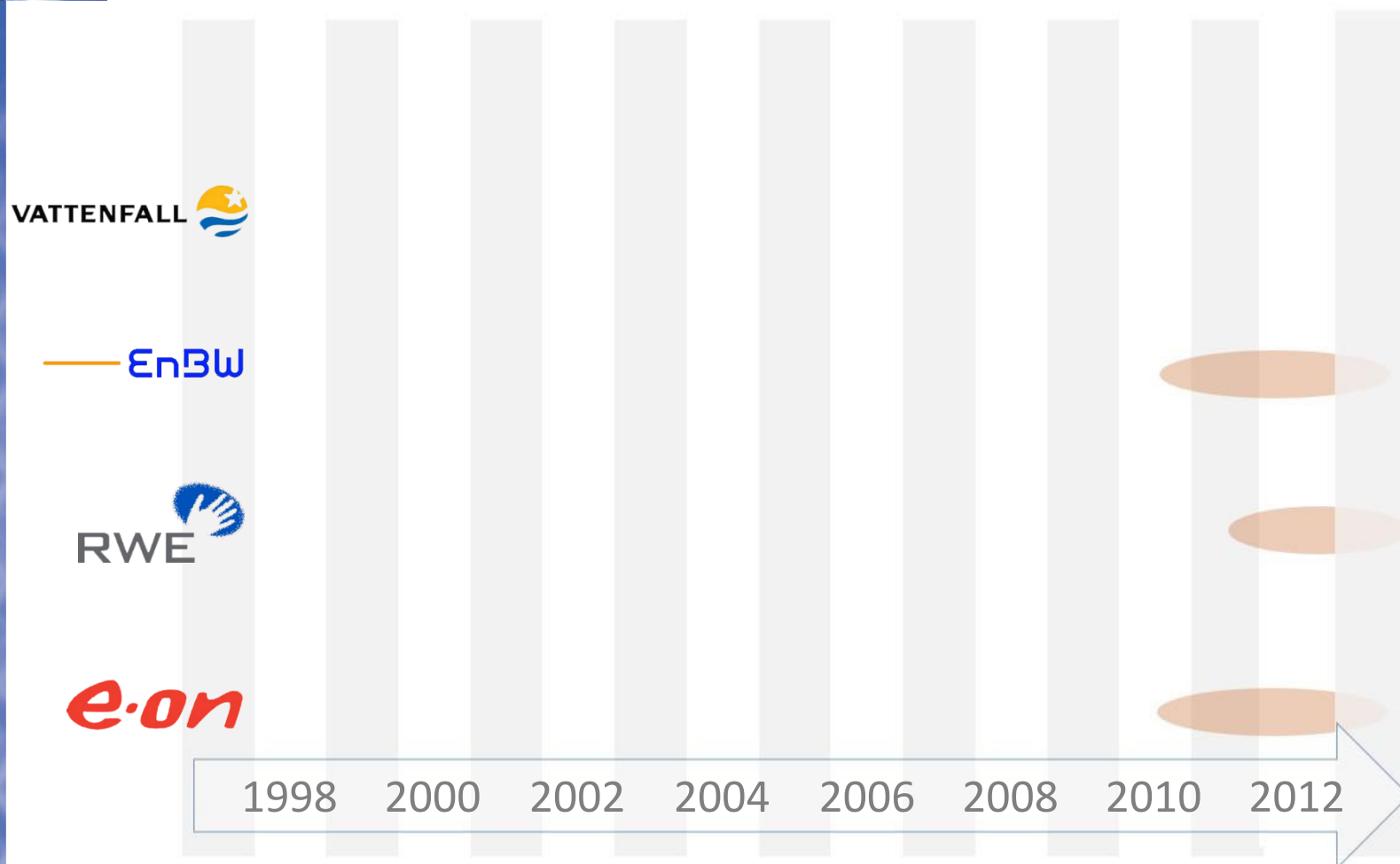


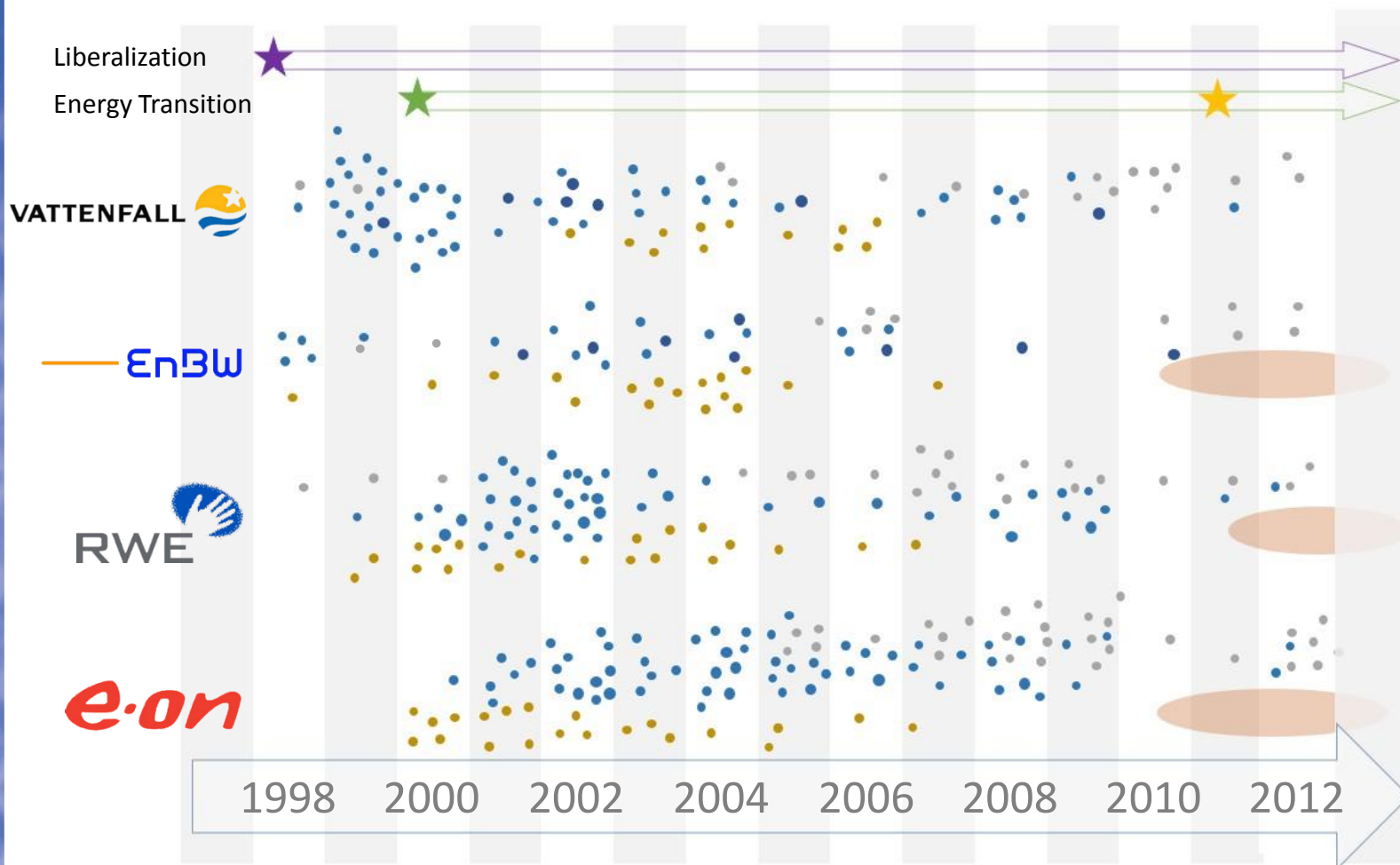


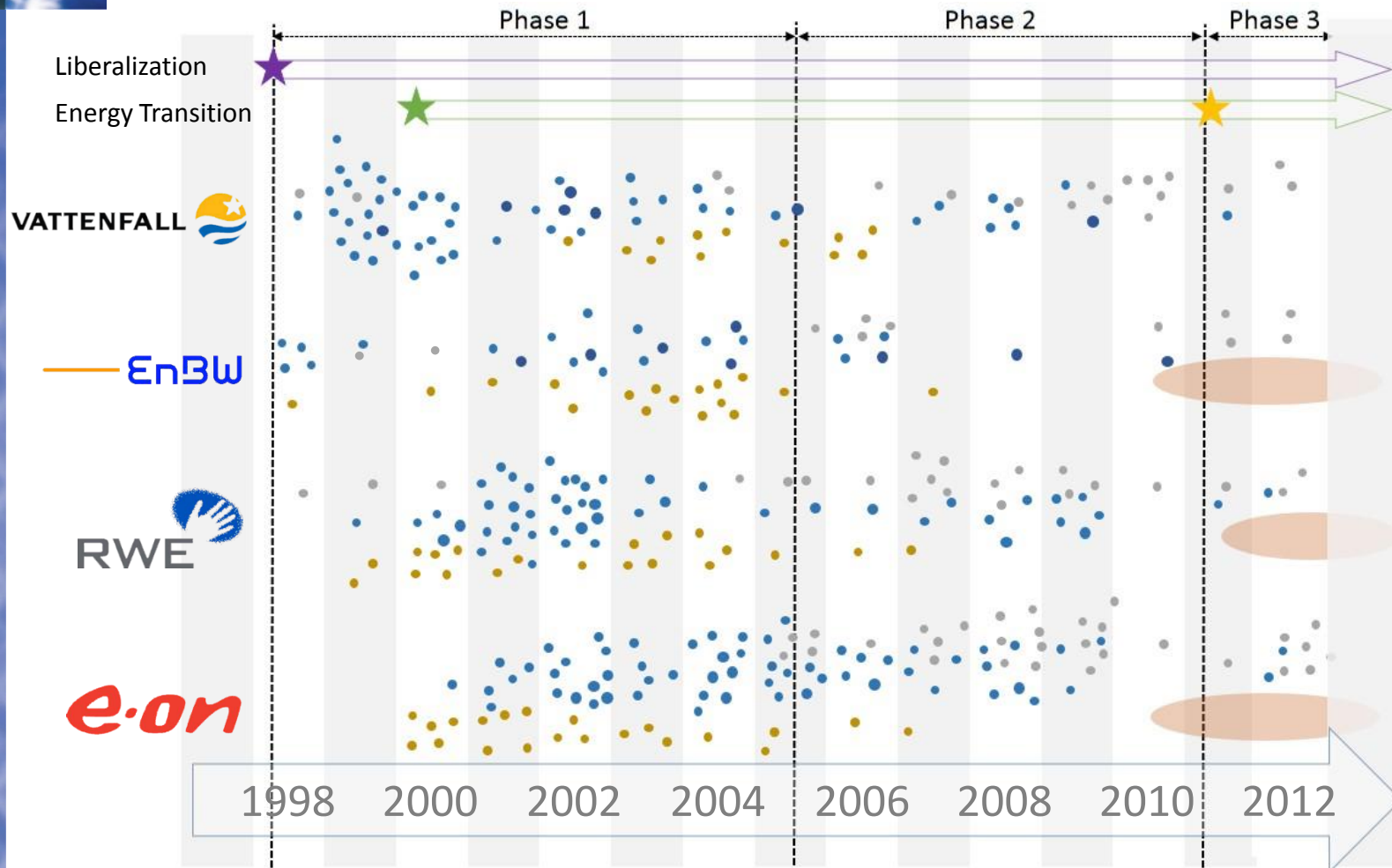


Disinvestment in
non-core business











Thank you for your attention

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