



ECRB Customers and Retail Markets Working Group

**Next generation of customers and digital channels
of communications in the Energy Community
Contracting Parties**

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The purpose of the report was to **assess the availability of digital products and services offered by suppliers, network operators and other stakeholders to customers in electricity sectors** of the Energy Community Contracting Parties and to **provide recommendations for designing better regulatory framework** in this field

- *The definition of electronic communication*
- *Digital channels of communication*
- *Provision of on-line services*
- *Development of price comparison tools (PCT)*
- *Development of mobile applications by suppliers*
- *Online switching, as well as*
- *Energy offers and possible surveys carried out by licensees*

Definition of electronic communication

The majority of the regulatory authorities have not included electronic communication in their legislation, but they act based on general state legislation approved by other relevant institutions

- *law on electronic communication applicable for all sectors*
- *In Kosovo, in addition to the implementation of the Law on electronic communications, electronic communication is also regulated by ERO's Operational rulebook*
- *As an example, the Georgian Law on Electronic Communications defines the electronic communication as "a technological system of electronic processing, routing (switching), conveyance and transmission of calls and various information signals, including by wire (including fibre-optic), satellite, radio or optical equipment, and other technological means and operational technical resources including fixed (circuit - and packet-switched, including Internet) and mobile communications, digital broadcasting, and terrestrial broadcasting and cable networks"*

Institutional Digital channels of communication

In all analyzed markets, customers and other interested parties may contact NRAs electronically, whereas official e-mails are a main channel of communication. In the majority of Contracting Parties, customers have the possibility to address other institutions and companies electronically

- *official e-mails*
- *Customer Corner(on NRA web page)*

Social Media

- *In the Contracting Parties, only regulatory authorities of Georgia, Kosovo, Moldova and Ukraine reported that they use social media as an additional channel for communicating with customers and the public.*
- *The Georgian regulator has official accounts on Facebook, LinkedIn and Twitter for communicating with customers.*
- *Ukraine uses Facebook, Twitter and YouTube as official channels of communication with customers.*

Number of internet users

CP	Number of internet users			
	2018		2019	
	fixed cable	mobile	fixed cable	mobile
Albania	n.a.	n.a.	82.2% of households	88.9% of households
Bosnia and Herzegovina	716,685	3,195,294	746,271	3,330,502
Georgia	858,000	2.9 million	n.a.	3.2 million
Kosovo	308,555 (93.2%)	1,288,654 (70.9%)	335,764 (94.4%)	1,316,939 (72.5%)
Moldova	623,135	2,948,000	670,530	2,381,083
Montenegro	n.a.			
North Macedonia	n.a.			
Serbia	72.9% of households			
Ukraine	24,100,000 (62.6%)	45.9%	n.a.	n.a.

Electronic communication of DSOs, suppliers and consumers

The communication procedures and channels used by the DSOs and suppliers in the Contracting Parties are:

- *Websites, call centers, mobile applications, SMS and e-mails*
- *In Kosovo the supplier has launched a new Inter Voice Response System in the call center that allows customers to access valuable information related to electricity services*
- *Ukraine: DSOs and suppliers have made available communication with customers via separate e-mail, call center, personal account on the website, mobile applications and chat-bot in Viber.*

Online services

Online information or services the DSOs offer to customers

	ALB	BIH	GEO	KOS	MDA	MKD	MNE	SRB	UKR
Planned outages	x	x	x	x	x	x		x	
Network maintenance			x	x			x		
Distribution tariffs		x	x	x				x	x
Phone number for reporting failures		x	x	x				x	x
Price list for services		x	x	x		x		x	x
Load curves		x							
Procedures for new connections		x	x	x			x	x	x
Laws and regulations		x	x	x		x	x	x	x

Online information or services the Suppliers offer to customers

	ALB	BIH	GEO	KOS	MDA	MKD	MNE	SRB	UKR
Billing	x	x	x	x	x	x	x	x	x
Information on consumption	x	x	x	x		x	x	x	x
Consumption history		x		x		x	x	x	x
Online payment	x	x	x	x	x	x	x	x	x
Price information	x	x	x	x	x	x	x	x	x
Transactions				x			x		x
Complaints	x		x	x	x	x		x	x

Addition online services:

- complaints seeking clarification or additional information;
- change of the name in the account card;
- meter replacement;
- closing or activation of the account;
- request for changing the tariff group'
- request for meter inspection;
- request for re-sealing;
- request for re-connection, etc.

Online access to consumption data

- *In Georgia, in addition to the suppliers' website, customers receive information about consumption and fees via SMS and e-mail due to their request.*
- *Kosovo reported that all customers who have smart meters can view their consumption on real time through supplier mobile application and/or can get information through call-center or e-mail. In addition, customers can find valuable information on their energy consumption (current and historical/numerical and graphical) via an App. This available information allows customers to better understand their consumption and utilize it in an efficient manner.*
- *Montenegro reported that customers may view their consumption online via a mobile App that is related to the type of meter the customer owns.*
- *In Serbia, all customers connected to the transmission system have the possibility to view their consumption in real time. The grid code defines that direct access to the metering data via remote or local communication is allowed for customers.*

Development of price comparison tools (PCT)

Price comparison tools as an important tool for facilitating retail market development are available in Bosnia and Herzegovina and North Macedonia only. The relevant links are also available on NRAs' web pages. On the other side, the website of the Georgian NRA includes a price calculator for grid connection, while Kosovo reported that the bill calculator is available on the NRA's website

Mobile applications

Only in Albania, Kosovo, Montenegro and Ukraine suppliers have developed mobile applications

Information provided to customers by suppliers through mobile applications

	Bill display	Bill payment	Outage information	Information on energy usage	Account settings and control	Immediate access to phone support	Meter reading submission
ALB	x	x					
KOS	x	x	x	x	x	x	x
MNE	x			x			
UKR	x	x		x	x	x	x

Online switching

In the majority of the Contracting Parties, namely in Albania, Bosnia and Herzegovina, Georgia, Kosovo, Moldova and Montenegro online switching is not possible. In North Macedonia, Serbia and Ukraine such a possibility exists.

- *In North Macedonia, the switching procedure is conducted by the DSO on the request of the suppliers. Suppliers submit necessary documents online on the application developed by DSO. The procedure is prescribed in the electricity supply rules. Also, the DSO issues a switching confirmation through this application*
- *In Serbia and Ukraine, switching requests may be submitted via e-mail.*

Energy offers and possible surveys carried out by licensees

In Montenegro, North Macedonia and Ukraine customers may sign up for different energy offers

- *The **Montenegrin** regulator reported that on the website of the supplier there are offers for different tariff models. If the customer wants to change the tariff model, he/she signs a new supplier contract at the supplier premises.*
- *In **North Macedonia**, the regulator has introduced a web based price comparison tool for comparing electricity prices (<https://www.switch.mk>), which allows suppliers to offer online energy packages/offers depending on time of use and contracts duration.*
- *In **Ukraine**, suppliers offer different prices for different quantities of energy, for specific time of use or different payment methods.*

Surveys on customer satisfaction are regularly performed only by Ukrainian suppliers. In other Contracting Parties such practice has not been established yet

Recommendations

- *Electronic communications are regulated in different ways within the legal frameworks of Contracting Parties, mostly within laws on communication. Having in mind that energy laws are quiet on this issue and that the upcoming energy transition brings active consumers in its focus, it is recommended that NRAs explore the possibilities to adapt/adopt secondary legislation needed for further development and support of digital services in energy sector.*
- *Considering the technological developments as well as the high use of internet in all Contracting Parties, it is recommended that regulators and energy companies increase electronic services, move from traditional communication to digital, by using different channels of communications.*
- *ECRB recommends that NRAs include a requirement for energy companies/licensees to conduct regular surveys on customer satisfaction, in particular with respect to online services, in order to improve customer satisfaction and address consumer expectations, needs and preferences.*

**Thank you for your
attention**