



24th Athens Forum

28 - 29 May 2019

Poll results

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- What is the main barrier for the functional, harmonised operation of the connected power systems and full market integration in the EnC region?
- There is no clear regulation which can solve actual question- which of two offices will operate a cable auctions- JAO or CAO. If there is no clear regulation in this regard, what should be a solution?
- Survey

The Athens Forum is an excellent opportunity to:

0 4 1

hear about latest electricity market developments and trends



kick-off the holiday season



mingle with colleagues and friends



none of the above



Survey (1/2)

0 1 3

What is the change in the Clean Energy Package regarding market design which is most relevant for you?

- Stricter regime for Capacity mechanisms
- Coal capacity restrictions.
- Prosumers
- A framework for all types of capacity mechanisms.
- Adapting market to flexibility
- Consumer empowerment
- Requirements on interconnection capacity
- consumer empowerment
- Imbalance costs for RES producers.
- getting close to customer taking care of environment
- the 70% rule for the calculation of cross-border capacity
- phase out of price regulation
- Clear support to renewables

Survey (2/2)

0 1 0

Could implementing some of the new rules be problematic in your country? Wich?

- Dynamic pricing for end consumers due to lack of proper metering equipment.
- Challenges for sharing costs of achieving the 70% capacity
- Political support
- Ambitious targets
- digitalisation and cyber security
- CACM
- The will and inertia of key stakeholders
- Regulation of independent aggregators and local communities is unnecessary and could result in market distortions.
- phase out of price regulation
- Renewable support and market integration

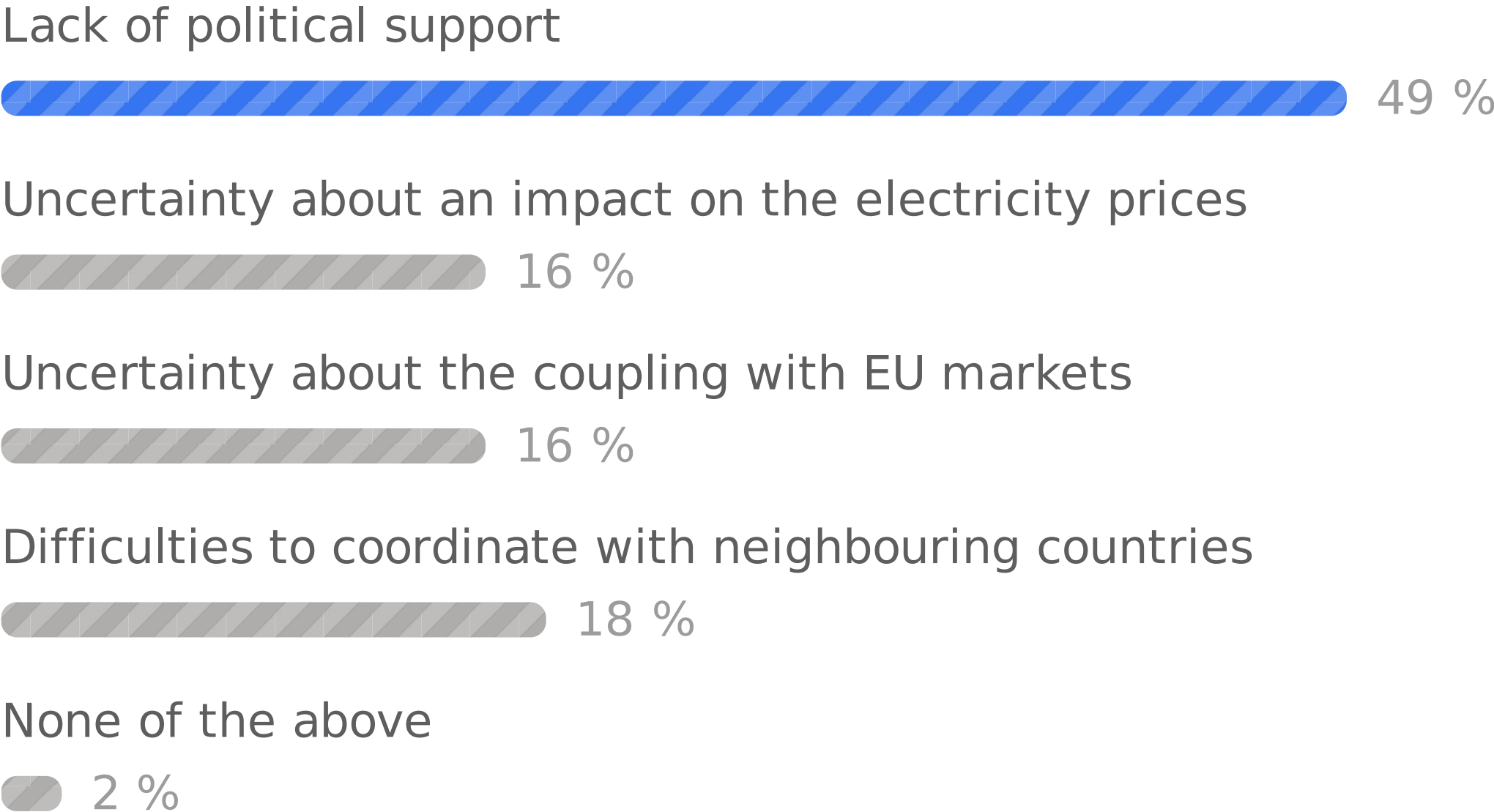
Where do you see the main progress in the development of electricity markets in your country?

009

- No progress
- Market Coupling with neighbours & (merchant) RES development - altogether with finalization of development and practical implementation of Regional Balancing Mechanism.
- Deregulation on wholesale Markets
- Market coupling
- no progress
- Smart metering
- consumer rights
- Internal interconnections
- Cross boarder trade

What is the main reason behind the slow development of day-ahead markets in the Energy Community?

0 4 5



Panel Debate I (1/2)

0 4 4

Do you think that market coupling between EU Member States and the Energy Community will happen within the next years?

On a voluntary basis



Only when it becomes legally binding



Panel Debate I (2/2)

041

Do you think that the first market coupling involving the Energy Community Contracting Partie(s) will happen in 2020?

Yes



No



Panel Debate III (1/3)

0 2 9

Do you see risks for the security of electricity supply due to the phase-out of coal, the rise of intermittent renewables, and/or a lack of investment?

Yes



No



Panel Debate III (2/3)

0 2 9

Do you see the markets in the Energy Community as fit enough to take care of the challenges of the energy transition?

Yes



No



Panel Debate III (3/3)

030

Do you see capacity mechanisms as applied by many EU Member States and some Contracting Parties as

YES, a useful complementary measure



NO, detrimental to the liberalization process



If any, where do you see the main risks resulting from capacity markets?

0 2 8

(1/2)

no risk, they will just be needed to keep electricity production stable



further distortions of the market



disincentive to demand response



extra costs for customers



possibility for established producers to get extra subsidies



If any, where do you see the main risks resulting from capacity markets?

0 2 8

(2/2)

tend to benefit CO2-intensive producers



Cleaning up (1/3)

0 2 3

What will be the share of electricity from coal in 2050 in the Energy Community?

The same as today



Reduced



Increased



Coal will be phased out



I don't know



Cleaning up (2/3)

0 2 2

Do you support introduction of a carbon price mechanism in the Contracting Parties?

Not in the foreseeable future



As soon as possible



Yes, but slowly and prudently



Cleaning up (3/3)

0 2 3

Do you agree with the following statement: “relying on domestic coal is the best means to maintain affordable electricity”

I fully agree



I fully disagree – this is a shortsighted view that sells environment and climate protection over political quick-wins



The truth is in the middle



Should there be a more tolerant approach to using coal in South East Europe?

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Yes, the difficult economic situation doesn't justify the high costs of investing in carbon-free production



No, renewable energy is the cheapest production source today and South-East-Europe is a perfect place for renewables.



Do you agree with the following statement: “interconnected electricity systems with non-Energy Community countries need common legal rules ”?

0 3 2

I fully agree – different rules create an unfair misbalance of market players’ obligations



I partly agree – only a minimum set of common technical rules is needed to ensure safe system operation



I don't agree at all – bilateral contractual arrangements are enough



I think the Energy Community should further intensify cooperation with:

(1/2)

0 2 4

Mediterranean countries – we share common members and common electricity market targets, e.g. regional electricity market establishment

0 %

Turkey – the Turkish electricity market would add liquidity to the Region and builds a bridge to the Georgian electricity market

38 %

Azerbaijan – the ongoing reform process is an encouraging signal

8 %

All of them

46 %

I think the Energy Community should further intensify cooperation with:
(2/2)

0 2 4

None of them



What is the main barrier for the functional, harmonised operation of the connected power systems and full market integration in the EnC region?

0 2 3

Lack of physical interconnections (adequate infrastructure)

 9 %

Regulatory barriers (need for regulatory framework alignments)

 91 %

There is no clear regulation which can solve actual question- which of two offices will operate a cable auctions- JAO or CAO. If there is no clear regulation in this regard, what should be a solution?

- Split LT on one and short term on the other until both Auction offices merge
 - What amount of capacity of the cable will be auctioned ? 500, 600 or ? MW
 - Since from the Montenegrin side there is a number of smaller power systems with a number of a
- local market players, SEE CAO is might be preferable, but if no agreement (who to agree?) then 50/50%.
- the auction - the better offer wins

Survey (2/3)

0 0 1

Has introducing coordinated capacity allocation on Turkey-Greece border, or between energy community contracting parties, increased allocated volumes of cross border transfer capacities?

- Yes, among other reasons, due to larger number of auction participants.

Survey (3/3)

001

Can introduction of coordinated capacity allocation increase TSO incomes from auctions?

- Irrelevant if NRAs controls TSO incomes.