



*Retail market developments  
- trends in the Energy Community*

*Aca Vuckovic and Igor Telebak*

26 May 2021

# Content



- *Overview of the process*
- *Electricity retail markets*
- *Customer protection and empowerment*

# Overview of the process



- *preparing a questionnaire in the working group*
- *filling in the questionnaire by NRAs and sending it to the task force leaders*
- *preparing draft report by task force leaders*
- *commenting draft report in the working group*
- *adoption of the final version of the report by the working group*
- *ECRB adopts the report*

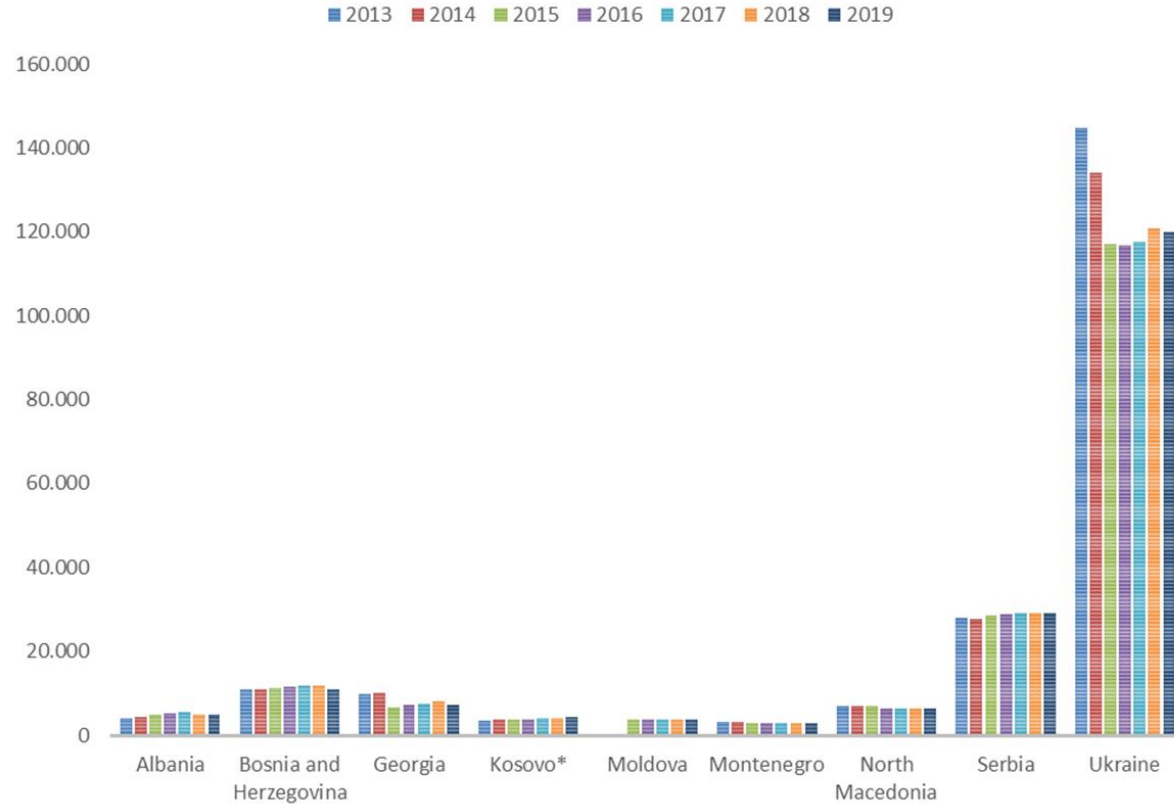
# Questionnaires on electricity and gas



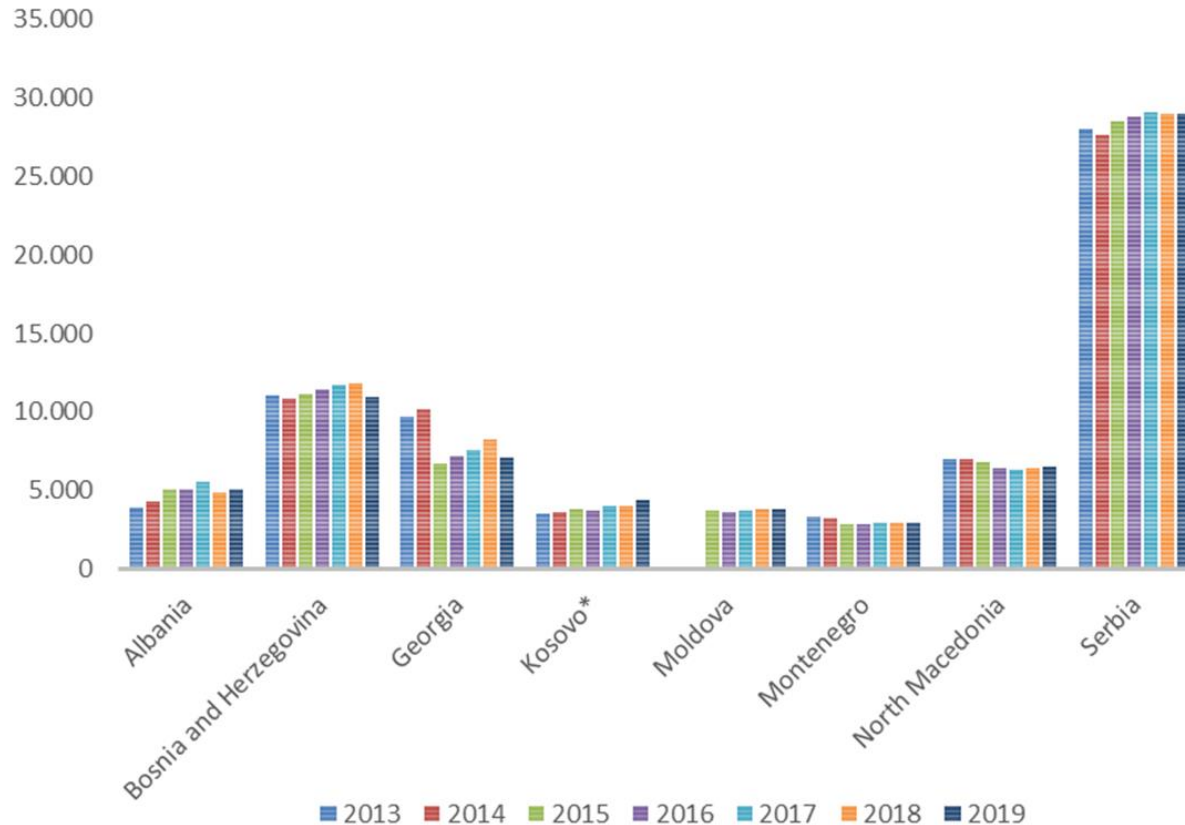
- *Description of retail market (electricity/gas sales, data of customers, data of suppliers)*
- *Description of prices for households (different seasonal prices, day/night prices, peak/of peak prices)*
- *Description of regulated end user prices*
- *Switching supplier*
- *Pricing for households and industrial customers*

# *ELECTRICITY RETAIL MARKETS*

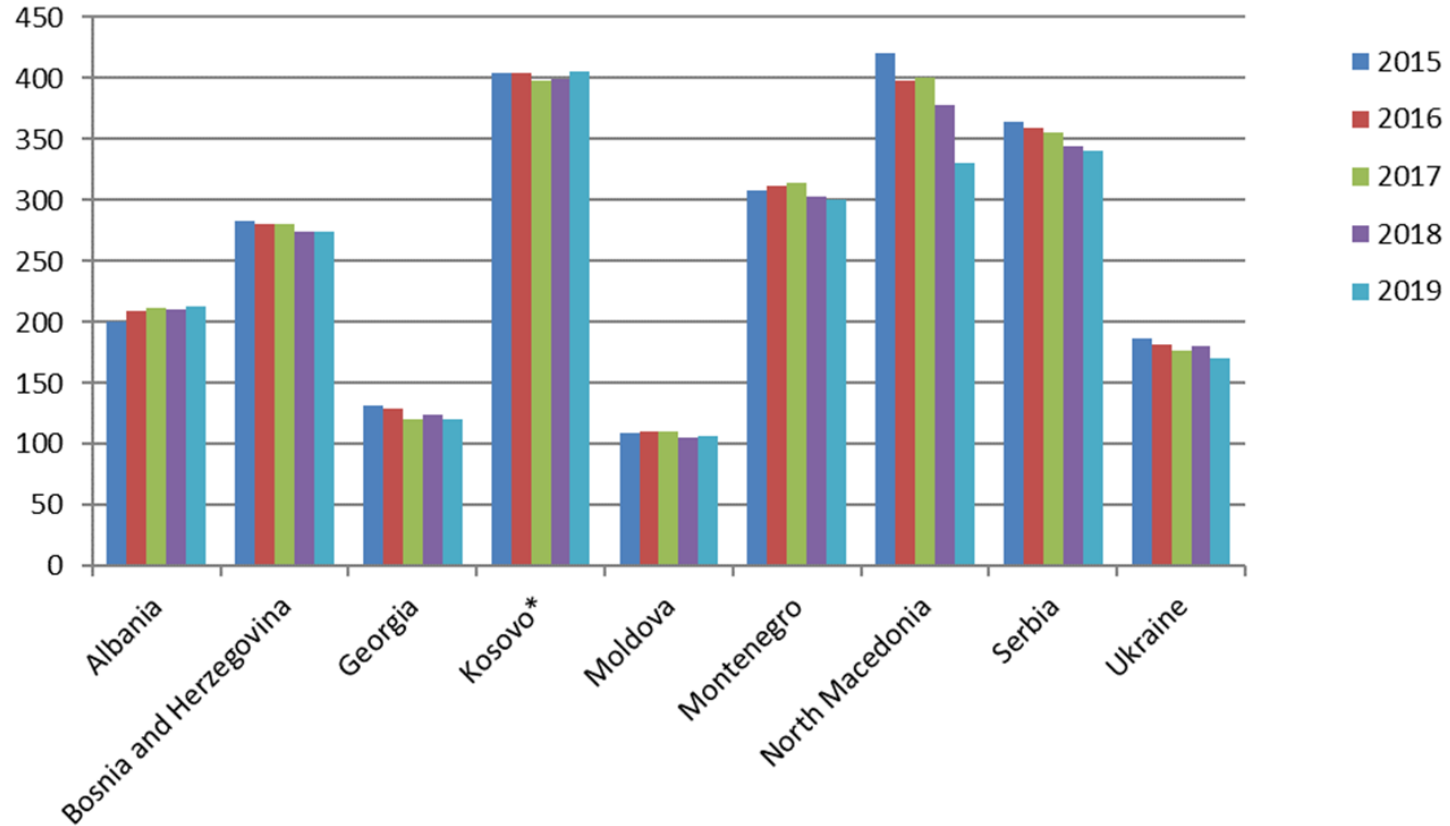
# Total electricity sale to final customers in GWh 2013-2019



# Total electricity sale to final customers in GWh 2013-2019 (excluding Ukraine)



# Average monthly consumption of electricity per household in 2015-2019 (kWh)





# Number of suppliers in retail electricity markets in 2016-2019

	Number of licensed electricity suppliers				Number of active electricity suppliers			
	2016	2017	2018	2019	2016	2017	2018	2019
<b>Albania</b>	41	32	38	31	20	21	23	22
<b>Bosnia and Herzegovina</b>	32	32	29	24	13	13	14	14
<b>Georgia</b>	3	2	2	2	3	2	2	2
<b>Kosovo*</b>	3	3	7	8	1	1	1	1
<b>Moldova</b>	17	17	27	31	3	3	5	7
<b>Montenegro</b>	5	5	5	6	2	2	1	1
<b>North Macedonia</b>	77	61	62	86	12	19	20	23
<b>Serbia</b>	60	63	67	67	14	19	18	13
<b>Ukraine</b>	37	219	274	641	124	127	152	641

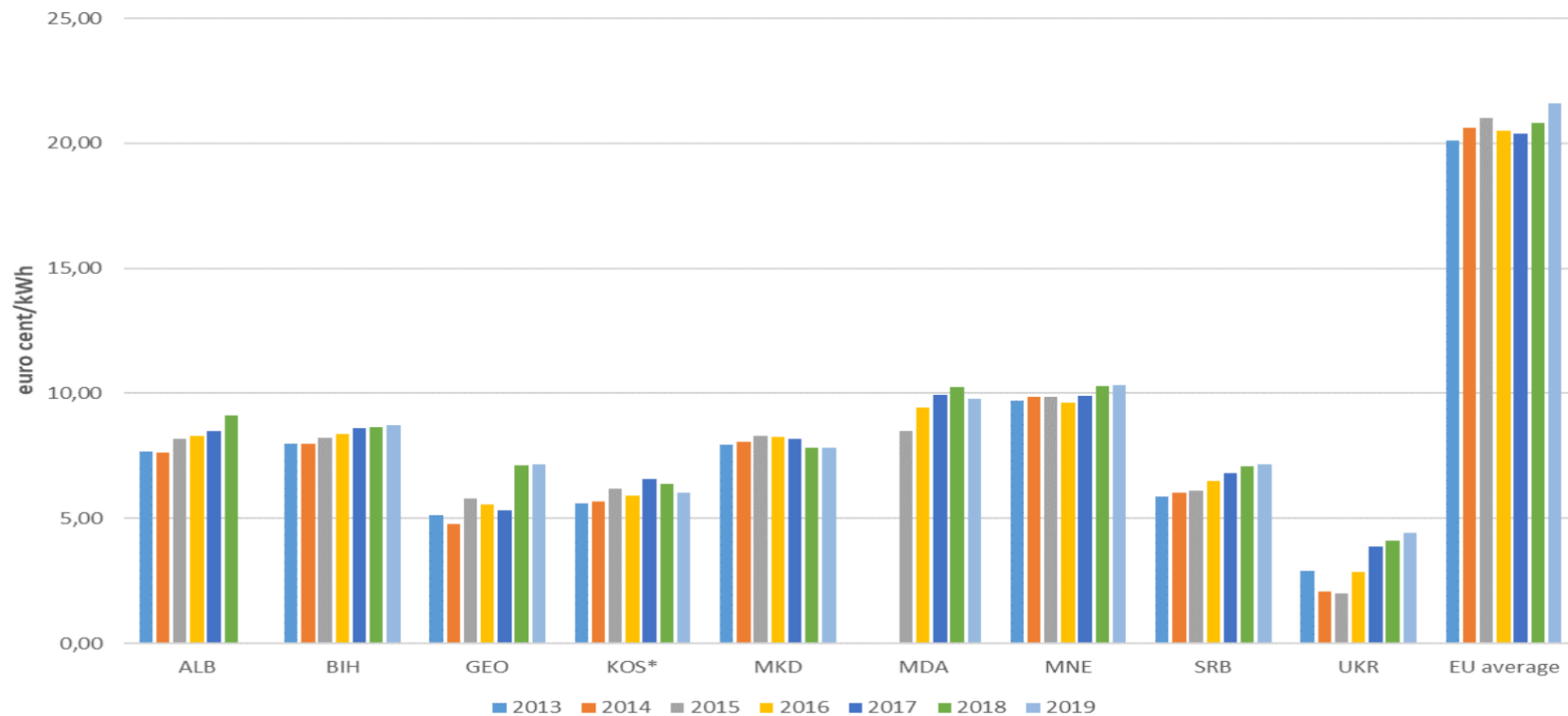
# Electricity retail market concentration in 2016-2019

	Number of electricity retailers selling at least 5% of total electricity consumed by final customers				Market share of the 3 largest companies in the retail market (aggregated) in %			
	2016	2017	2018	2019	2016	2017	2018	2019
<b>Albania</b>	1	-	1	1	96,0	-	93,0	100
<b>Bosnia and Herzegovina</b>	3	4	4	3	95,1	88,2	83,8	97,6
<b>Georgia</b>	2	2	2	2	100	100	100	100
<b>Kosovo*</b>	1	1	1	1	100	100	100	100
<b>Moldova</b>	2	2	2	2	100	100	96,9	97,5
<b>Montenegro</b>	1	1	1	1	100	100	100	100
<b>North Macedonia</b>	3	3	3	3	84,7	91,6	92,5	92,0
<b>Serbia</b>	1	1	1	1	98,6	97,3	96,4	99,3
<b>Ukraine</b>	4	3	3	5	32,8	32,0	32,0	26,1

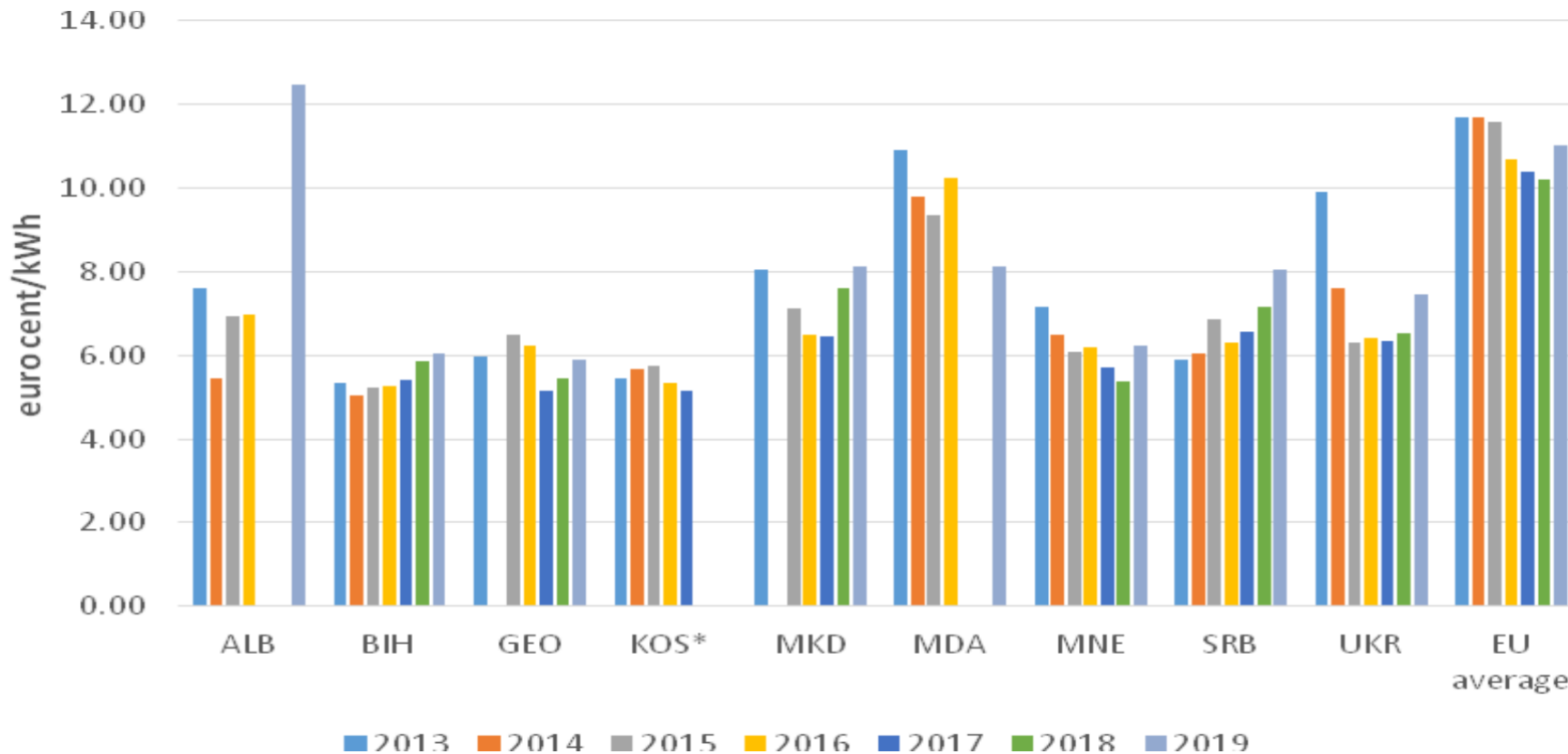
# Switching in 2018 and 2019

	Number of eligible customers under national legislation/active eligible customers		Annual switching rate in the <u>whole retail market</u> (by number of meter points)		switching rate in the <u>whole retail market</u> (by volume)	
	2018	2019	2018	2019	2018	2019
Albania	-	108/41	-	0.002	-	-
Bosnia and Herzegovina	1,553,439 / 31	1,567,785 / 16	0.002	0.001	14.74	3.34
Georgia	-	-	-	-	-	-
Kosovo*	579,976 / 0	605,676 / 3	0	0.0005	0	10.53
Moldova	1,338,499 / 0	1,303,839 / 261	0	0.02	0	-
Montenegro	386,956 / 0	396,470 / 0	0	0	0	0
North Macedonia	21,561 / 4,344	868,614 / 7,231	20.15	0.83	15.79	7.86
Serbia	3,651,353 / 17,570	3,663,675 / 15,703	0.48	0.43	3.41	2.80
Ukraine	622,690 / 1,145	18,785,415 / 87,887	0.023	0.47	5.26	22.98

# Electricity prices for households 2013-2019 (euro cent/kWh)



# Electricity prices for industrial consumers 2013-2019 (euro cent/kWh)



# Number of non-households (number of metering points) supplied at non-regulated electricity prices

	<b>Number of non- household customers supplied at non-regulated prices (number of metering points)</b>			
	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
<b>Albania</b>	10	15	26	41
<b>Bosnia and Herzegovina</b>	10,033	10,541	9,784	10,083
<b>Georgia</b>	0	0	0	0
<b>Kosovo*</b>	1	3	3	3
<b>Moldova</b>	0	0	0	0
<b>Montenegro</b>	-	14,502	15,235	16,203
<b>North Macedonia</b>	8,516	15,887	21,561	17,799
<b>Serbia</b>	104,862	106,458	135,589	139,140
<b>Ukraine</b>	-	1,420	2,774	1,099,305

## *CUSTOMER PROTECTION AND EMPOWERMENT*

# *Customer protection and empowerment- structure*



- 1. Supplier of last resort and disconnections*
- 2. Vulnerable customers*
- 3. Consumer information*
- 4. Complaint handling and dispute resolution*
- 5. Energy poverty*
- 6. DSO service quality*



# *Supplier of last resort and disconnections*



*Supplier of last resort for electricity exists in all Contracting Parties and for gas in North Macedonia, Moldova, Serbia and Ukraine. In Greece, a supplier of last resort is established for both electricity and gas.*

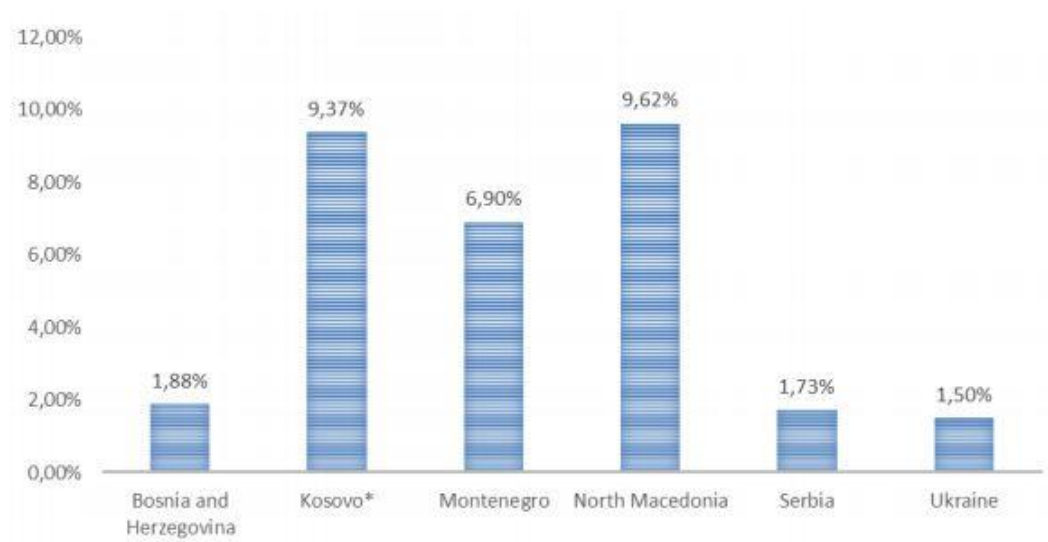
*The most common cases when a household customer may turn to the supplier of last resort on the electricity sector are:*

- when a customer does not find a supplier on the free market;*
- when a customer is dropped by its current supplier because of non- payment;*
- when the current supplier has gone bankrupt; or*
- when the license of the current supplier has been revoked.*

## Supplier of last resort and disconnections

*Legally envisaged for disconnection of household consumer because of non-payment varies from 8 days in Montenegro to 60 in Albania and North Macedonia.*

*The share of household disconnections due to non-payment for electricity in the Contracting Parties*



# *Vulnerable customers*



Criteria for identification of vulnerable customers in the Contacting Parties are:

- Income level
- Share of energy expenditure in disposable income
- Critical dependency on electricity powered equipment for health reasons
- Age

## *Vulnerable customers*

Measures to protect vulnerable customers in the Contracting Parties are:

- Restrictions on disconnection due to non-payment
- Earmarked social benefits to cover (unpaid) energy expenses
- Special energy prices for vulnerable customers
- Free energy-saving advice to vulnerable customers
- Right to deferred payment
- Exemption from some components of final customer energy costs (e.g. energy price, network tariffs, taxes, levies...)
- Financial grants for the replacement of inefficient appliances
- Free basic supply of energy

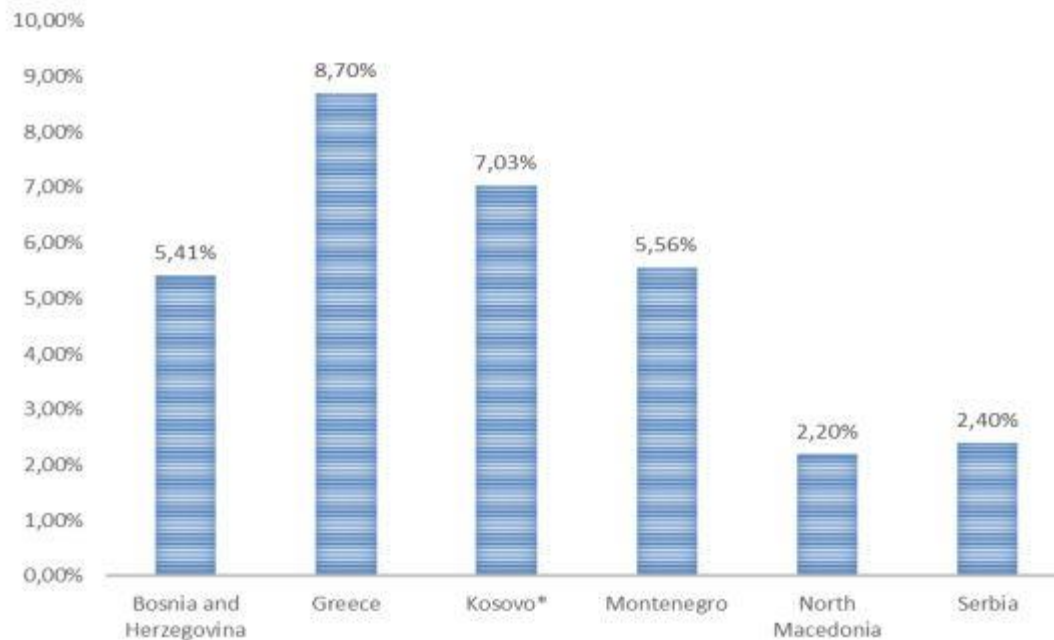
## *Vulnerable customers*

Measures to protect vulnerable customers in the Contracting Parties are:

- Restrictions on disconnection due to non-payment
- Earmarked social benefits to cover (unpaid) energy expenses
- Special energy prices for vulnerable customers
- Free energy-saving advice to vulnerable customers
- Right to deferred payment
- Exemption from some components of final customer energy costs (e.g. energy price, network tariffs, taxes, levies...)
- Financial grants for the replacement of inefficient appliances
- Free basic supply of energy

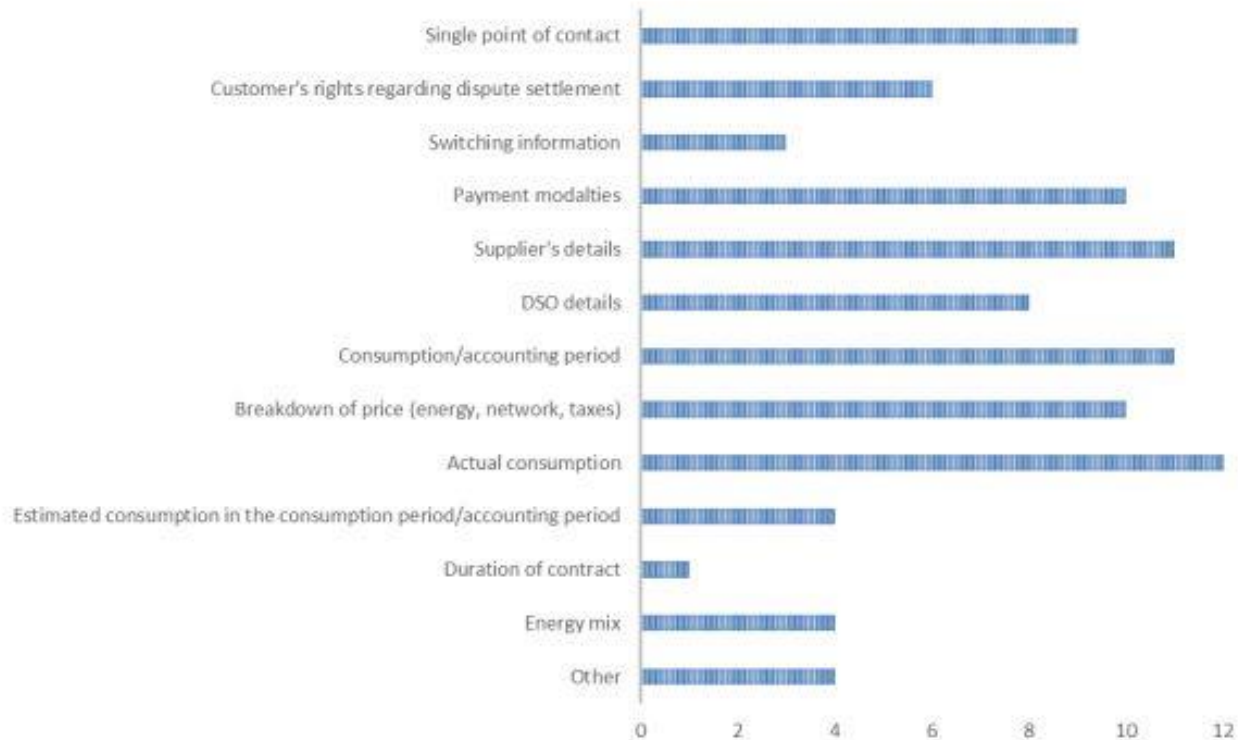
# Vulnerable customers

## Share of vulnerable customers



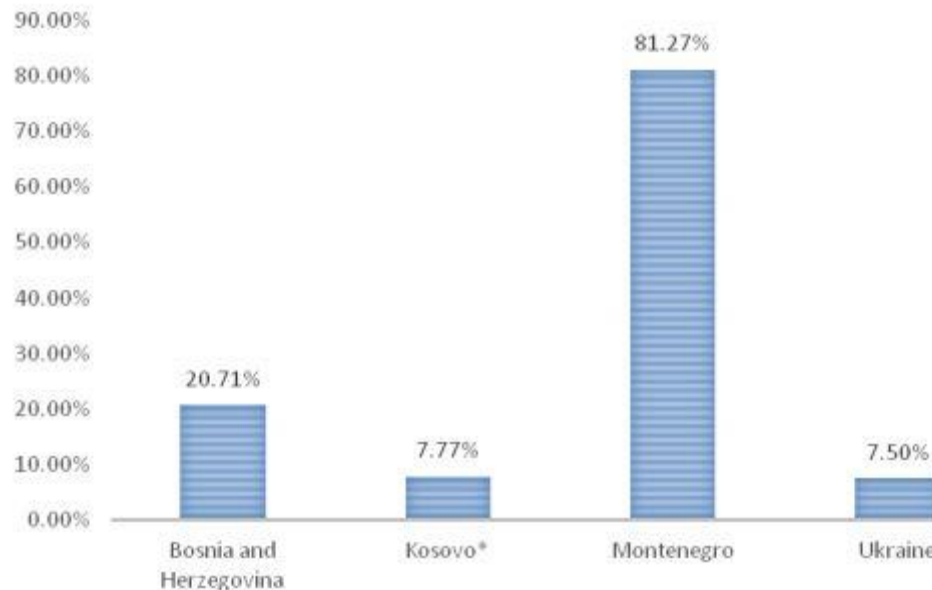
# Customer information

## Content of customer bills



# Customer information

## Share of households with smart meters in Energy Community Contracting Parties





# Complaint handling and dispute resolution

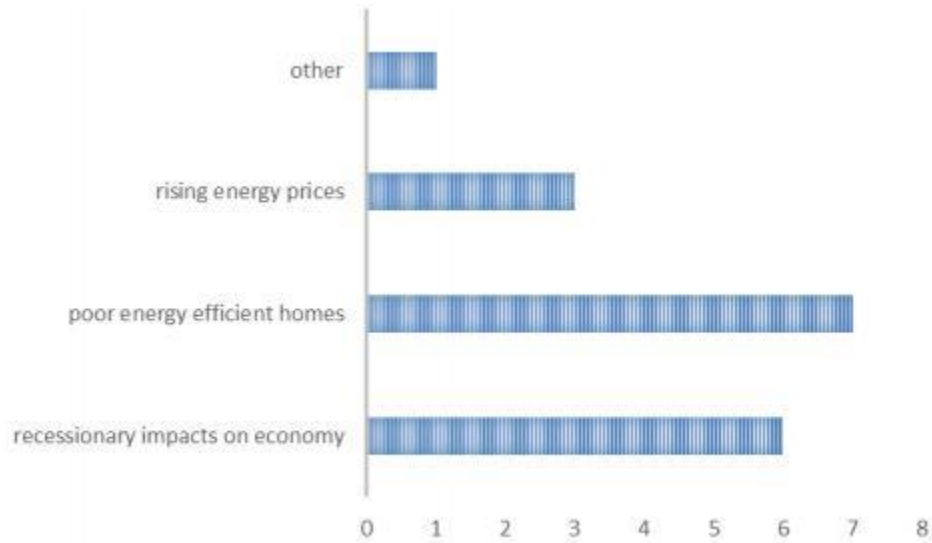
Number of household customer complaints received by different institutions in 2019

	Electricity				Gas			
	Suppliers	DSOs	ADR	NRA	Suppliers	DSOs	ADR	NRA
Albania	80,390	NA	22	183	NA	NA	NA	NA
Bosnia and Herzegovina	14,016	310	92		NA	NA	NA	NA
North Macedonia	31.133		70		NA	NA	NA	NA
Greece	1,284,570	32,742			126,359	79,861		
Georgia	NA	NAP	NA		NA	NAP	NA	
Kosovo*	1.589	278	0	102	NAP	NAP	NAP	
Moldova	NA	NA		439	NA	NA		108
Montenegro	7,476	NA	18		NAP	NAP	NAP	NAP
Serbia	NA	NA		239	NA	NA		0
Ukraine*	443,891	422,325		5,457	2,387	9,466	12,684	

# Energy poverty

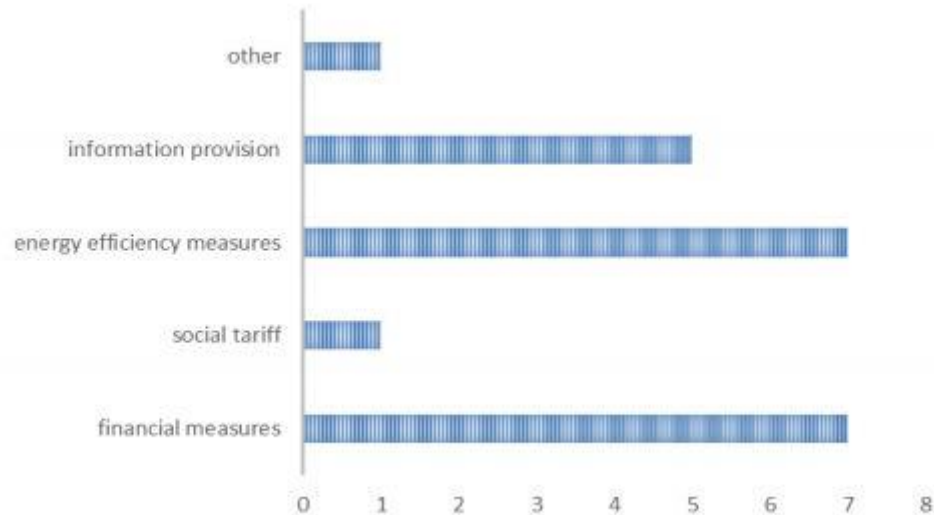
*Definition of energy poverty does not exist in any of the Contracting Parties.*

*Main causes of energy poverty in observed countries are:*



# Energy poverty

## Implemented measures addressing energy poverty in the Contracting Parties and Greece



# *Service quality of distribution system operators*

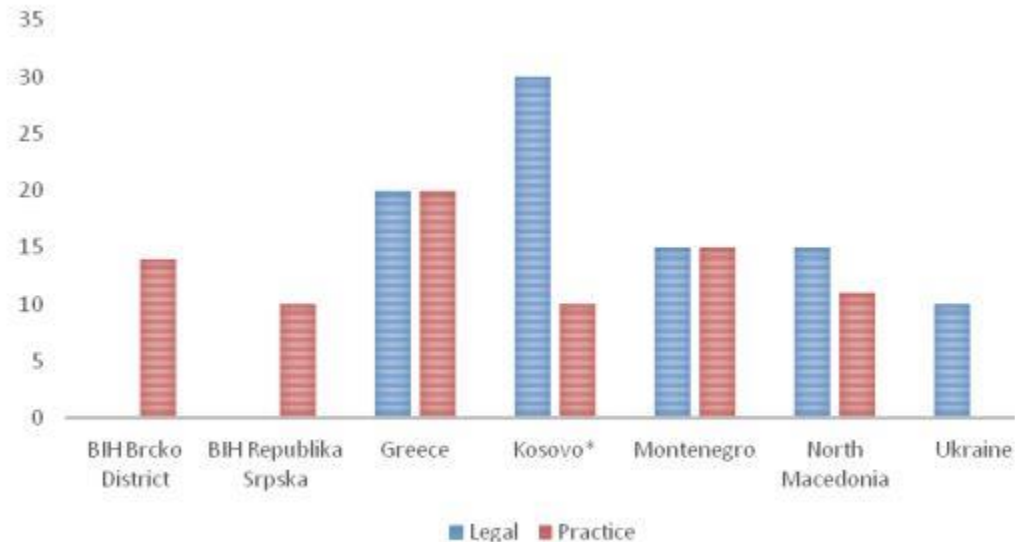


*Research covered the following indicators:*

- *Number of days to provide a price offer for a grid connection (from the date of consumer's request for a price offer),*
- *Number of days to connect to the network and activate energy supply to a consumer (from the date of consumer's request to be connected),*
- *Maximum number of days to disconnect the energy following a consumer request, and*
- *Maximum duration of a planned supply interruption.*

# Service quality of distribution system operators

*Number of days to provide a price offer for a grid connection (from the date of consumer's request for a price offer)*





*Thank you  
for your attention!*

[igor.telebak@regagen.co.me](mailto:igor.telebak@regagen.co.me)

[aca.vuckovic@aers.rs](mailto:aca.vuckovic@aers.rs)