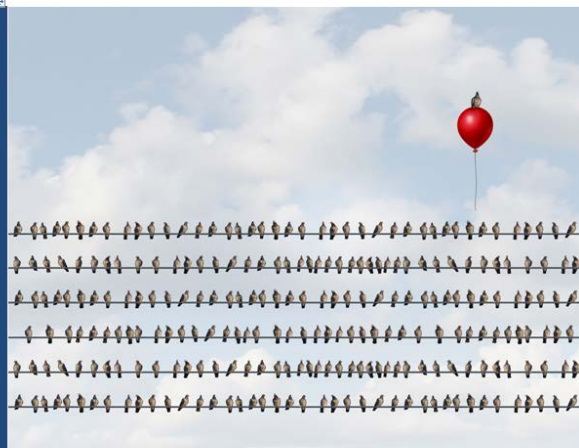


The background is a dark blue globe with glowing blue energy lines and nodes, suggesting a global network or energy grid.

# ***Customers & Retail Markets WG Activities***

Edin Zametica, ECRB CRM WG Chair  
Secretary (BIH-SERC)



Energy Community Regulatory Board

Work Program 2019

## **2019 CRM WG Meetings**

- 42<sup>nd</sup> Meeting, Vienna, 29 January 2019
- 43<sup>th</sup> Meeting, Brussels, 24 June 2019
- 44<sup>th</sup> Meeting, Sarajevo, 22 October 2019

## **CRM WG Deputy Chair: Mrs Salome Janelidze**

## **2019 Task Forces**

TF1 – Retail market monitoring

Co-Leaders: Mr Igor Telebak, Mr Aca Vučković

TF2 – Consumer Protection

Leader: Mr Florian Pichler

TF3 – Quality of Supply

Co-Leaders: Stefanovska Angelovski, Dubajić, Koval

TF4 – Prosumers


Leader: Mr Petrit Haziri

TF5 – Power Losses

## 1. Monitoring report on the functioning of gas and electricity retail markets in the Energy Community

 [Approval]

## 2. Prosumer survey

 [Agreement on written approval]

## 3. Update on other CRM WG activities

 [Information]

## 4. CRM WG Work Program 2020

 [Approval]



## ***MONITORING REPORT ON THE FUNCTIONING OF GAS AND ELECTRICITY RETAIL MARKETS IN THE ENERGY COMMUNITY IN 2018***

- **Background**
  - Assess the electricity and gas markets in the EnC
  - Identification of potential barriers
  - Recommendations on potential improvements
- **Report covers**
  - 9 EnC Contracting Parties, partly CRO and GRC
- **Methodology**
  - 3 detailed questionnaires to NRAs (electricity, gas and customer protection)
- **Document approved by CRM WG – 18 Nov 2019**



## **A. INTRODUCTION**

## **B. FINDINGS: ELECTRICITY**

- Market characteristics, Switching, End-user prices, HH price breakdown, Price regulation

## **C. FINDINGS: GAS**

- Market characteristics, Switching, End-user prices, HH price breakdown, Price regulation

## **D. CONSUMER PROTECTION AND CUSTOMER EMPOWERMENT**

- Background, SLR and disconnections, Vulnerable customers, Energy Poverty, Customer information, Customer complaints, Service quality

## **E. MAIN FINDINGS AND CONCLUSIONS**



- Total sale to final customers increased by 2.24 %, (without UKR increase 1.29 %), households consumption decreased
- Retail markets still highly concentrated (3 largest companies market share above 90 %; exception BIH 83.8 % & UKR 32 %)
- All customers can choose suppliers in BIH, KOS\*, MLD, MNG & SRB; UKR-non HH, dynamics specified in ALB, GEO & MKD
- Only a limited number of customers switched their suppliers in BIH, MKD, KOS\*, SRB & UKR (HH only in GRC & SRB), significant increase in MKD, SRB & UKR, decrease in BIH
- End-user electricity prices for households vary substantially (from 4.1 EUR cent/kWh in UKR to 10.27 in MNG) – EU: 20.8
- End-user electricity prices for industry more harmonized (from 5.36 in MNG to 7.59 in MKD)
- Prices for HH regulated in all CPs (except MNG); majority of non-HH customers have regulated prices (MKD & SRB small customers, BIH-0.4kV; no reg: ALB-35kV; KOS\*-TSO network)





- ALB, KOS\* & MNG do not have gas markets
- Gas consumption decreased in the period 2012-2018 (40 %)
- Number of active suppliers ranged from 4 in BIH to 234 in UKR
- End-users of gas supplied mainly by regional retail suppliers, only in CRO, GRC, GEO, SRB & UKR distribution networks with more than one supplier; CRO, GRC & MKD: customers connected to transmission networks supplied by one supplier
- All customers can choose suppliers, but switching rates are low
- Obstacles to retail market entries mainly come from reasons other than retail market design – scarce infrastructure and status of wholesale market development (e.g. single source of gas, poor access to liquid wholesale markets)
- End-user HH gas and industry prices increased (except MOL & UKR – industry); HH much lower than EU average, industry near EU level; cross-subsidization reduced
- Regulated end-user prices for HH (exceptions MKD and CRO)




- Appointed electricity SLR, except in GEO & UKR, CRO & GRC
- Gas SLR exists in MKD, MOL, SRB & UKR
- HH disconnections due to non-payment in electricity vary substantially (0.9 % - 11.19 %) *previous report (1.89 % - 10.92 %)*
- Vulnerable customers and protection measures defined in most CPs (including disconnection and social benefits to cover energy expenses); the share of vulnerable customers varied between 0.77 % in BIH to 8.01 % in GRC
- Customers informed about price changes in advance
- Monthly billing based on actual consumption in all CPs
- Intelligent (smart) metering systems roll-out in BIH, KOS\*, MNG, MKD (KOS 6.26 % – MNG 76.91 %)
- Wide choice of payment methods
- Mostly reasonable timelines for processing complaints. Majority of complaints refer to bills; in BIH & UKR significant part is related to QoS



## 1. Monitoring report on the functioning of gas and electricity retail markets in the Energy Community

 [Approval]

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## 3. Update on other CRM WG activities

 [Information]

## 4. CRM WG Work Program 2020

 [Approval]




## *Survey on Prosumers*

- **Assessing the upper level of ‘prosumers’ capacity qualifying them as small generators**
  - **Legal procedures, identifying potential barriers**
  - **Recommendations on potential improvements**
    - Detailed questionnaire on regulatory framework for prosumers prepared, data collection finalized
    - Draft report that covers 9 EnC Contracting Parties + GRC & ARM prepared and discussed
    - Editorial work in its final stage
    - Survey to be approved by CRM WG
- ☞ Agreement on ECRB Written Approval Procedure

## 1. Monitoring report on the functioning of gas and electricity retail markets in the Energy Community

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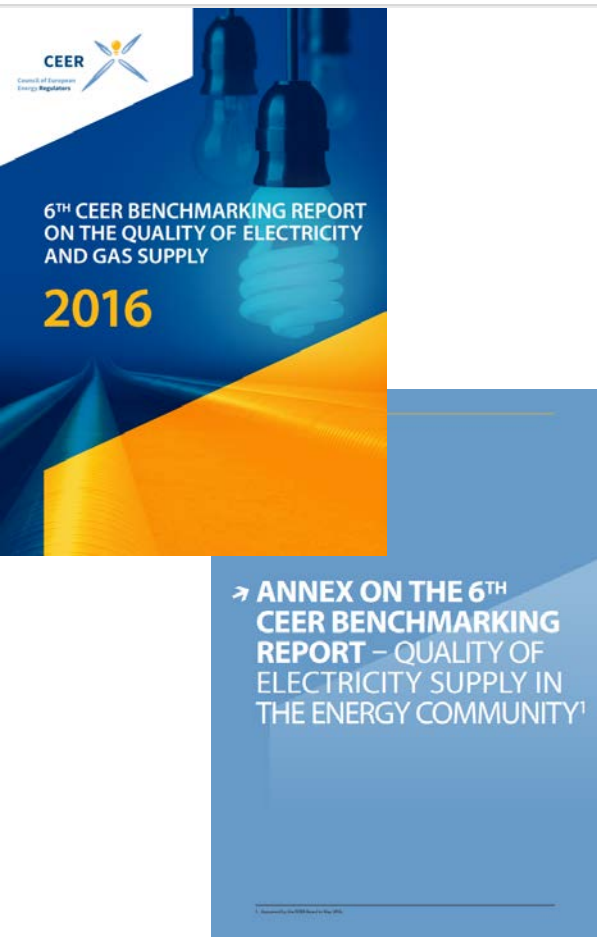
## **WS1:**

***Market Monitoring Report on the functioning of gas and electricity retail markets in EnC CPs***

## **WS2:**

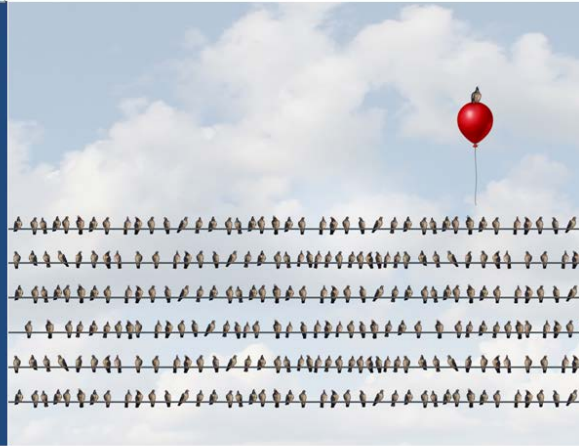
***Input to the annual market monitoring report of ACER-CEER on retail market developments***

- Breakdown of household prices based on retail offers
- NRAs completed questionnaire on electricity and gas offer breakdowns
- Requested data submitted to ACER
- ACER-CEER published Report on 30 October 2019



## *Joint CEER-ECRB benchmarking report on QoS*

- **Special TF established**
  - Commercial quality
  - Voltage quality & Continuity of supply
  - Gas quality
- **Close contact with CEER established (joint sessions of ECRB CRM WG and CEER QoS TF)**
  - Data collection questionnaires finalized and approved
  - Questionnaires completed by seven CPs (ALB & MOL to submit their responses)
  - Joint session of two TFs in Vienna 14-15 Nov 2019
  - Bulk of work in 2020



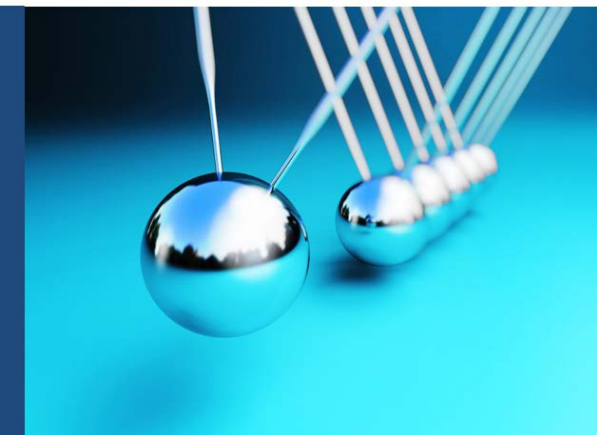
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## ***Contribution to the 2<sup>nd</sup> CEER Report on Power Losses***

- **Benchmark the level of network losses in European and Energy Community countries**
- **Financial, environmental and technical importance of losses reduction**
- **Identify different national practices regarding the definition and calculation of such losses**
  - NRAs completed questionnaire on network losses
  - Requested data submitted to CEER
  - Draft report to be finalized by 12 Dec 2019
  - CEER CRM WG to approve report on 10 Jan 2020
  - CEER GA approval planned for 23 Jan 2020
  - Report to be published afterwards





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## **TF1 – Retail Market Monitoring**

Co-Leaders: Mr. Igor Telebak, Mr. Aca Vučković

- Retail Markets Monitoring Report
- Input to the ACER-CEER market monitoring report

## **TF2 – Customer Protection**

Leader: Mr. Florian Pichler

- Joint ECRB-CEER-MEDREG customer workshop

## **TF3 – Quality of Supply**

Co-Leaders: A. Stefanovska Angelovski, N. Dubajić, R. Koval

- Joint CEER-ECRB benchmarking report on QoS
- Policy guideline on QoS (in cooperation with ECDSO-E)

## **TF4 – Digital Communication Channels**

TF Leader: Mr. Petrit Haziri

- Report on customers next generation and digital channels

## **TF5 – E-mobility**

TF Leader: Mrs. Dragana Josimović

- Survey on legal, regulatory, technical and economic aspects

The background is a dark blue globe with a grid of latitude and longitude lines. Overlaid on the globe are numerous glowing blue lines and circular nodes, representing a global network or energy grid.

*Thank you  
for your attention!*

[ezametica@derk.ba](mailto:ezametica@derk.ba)

[www.energy-community.org](http://www.energy-community.org)