

The background is a satellite-style image of the Earth at night, showing city lights. Overlaid on this are numerous glowing blue lines that represent energy transmission paths, crisscrossing the globe and connecting various regions.

***Implementation of the Energy Community
Treaty***
Janez Kopač
Director

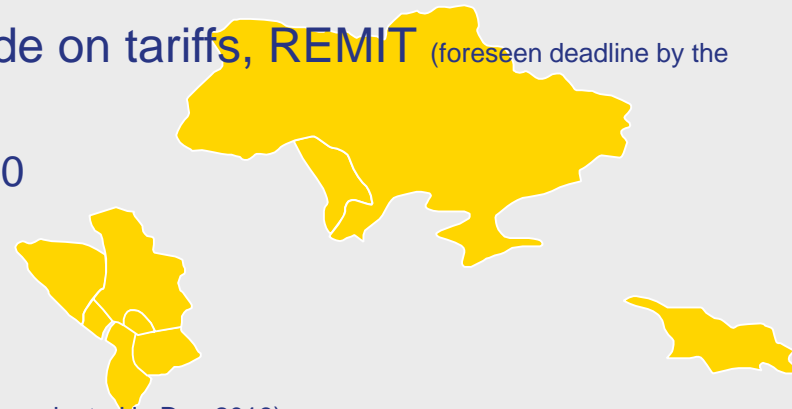
Directive 2009/73/EC & Regulation (EC) 715/2009 (1 January 2015 / 31 December 2020 for Georgia)

Network code on Interoperability and Data Exchange and Guidelines on Congestion Management Procedures (1 October 2018)

- Report on NC IO published by the Secretariat on 1 April 2019

Network code on Capacity Allocation, Network Code on tariffs, **REMIT** (foreseen deadline by the Feb 2020)

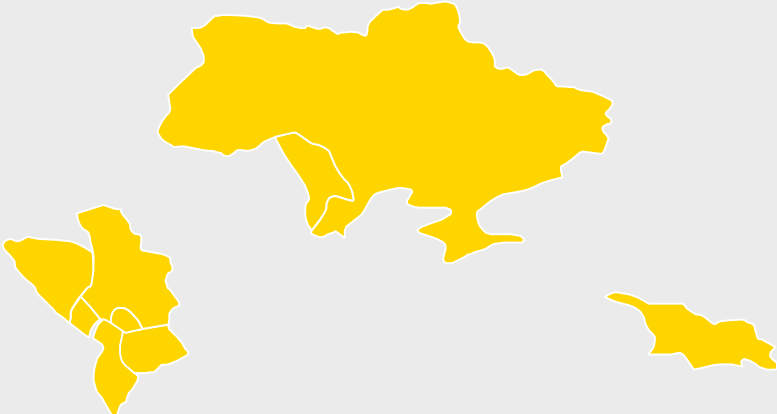
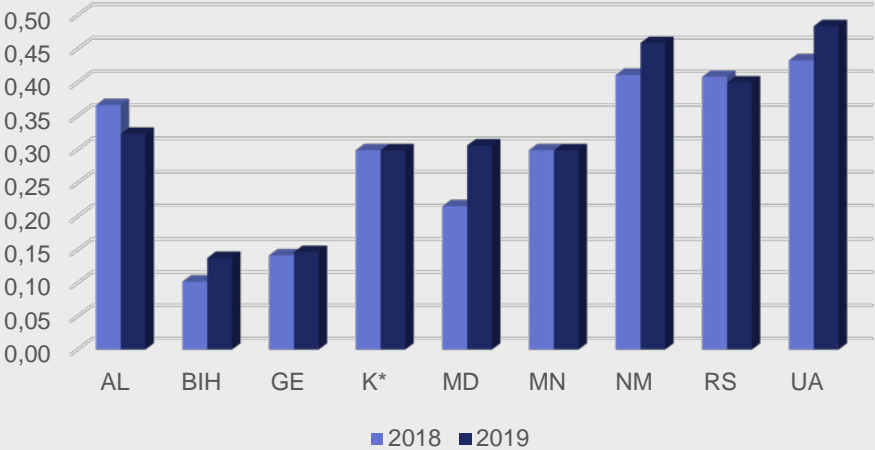
- First capacity allocation scheduled for 1 July 2020
- Incremental capacity procedure from 2021



Network Code on Balancing (discussion on adaptation finalised, to be adopted in Dec 2019)

Gas acquis implementation ratio

Progress 2018/2019



Albania: mixed signals

- *Albgaz* - capacity building ongoing, but its certification raises concerns – the same public bodies (and persons) control TSO and production/supply
- *TAP* and *Albgaz* drafted comprehensive network code
- No progress in TPP Vlora tendering

North Macedonia : implementing new law

- Many bylaws (supply and market rules, transmission and distribution tariffs) adopted
- Infrastructure development on going
- No resolution on the TSO yet – no certification

Bosnia and Herzegovina: no state gas law – sanctions to be prolonged

- Regulatory framework of entities decoupled
- RS signalled readiness to accept a state law as drafted

Serbia: foreclosed market

- Well developed regulatory framework, but a case against Serbia – no allocation of the IP Horgos capacity
- Lack of progress in the *Srbijagas* unbundling – case under art. 92 at the MC
- New advanced SoS bylaws
- But - *Gastrans* Exemption Decision diverts from the ECS Opinion

Montenegro and Kosovo*:

explore all possible options how to connect to the gas transmission systems of their neighbours

IMPLEMENTATION IN FOCUS (3)

Ukraine: post 2020 transit still uncertain

- A few days ago stalemate in the unbundling of a TSO from Naftogaz finally overcame very little time to have it certified by the end of the year
- Unresolved: PSO Public Service Obligation Resolution forecloses retail market
- Progress on application of gas transmission code in balancing, still with many open questions
- T-tariffs for national and cross border transmission finally brought to the same level
- Joint EBRD-ECS project to establish a gas exchange faces obstacles
- On going work on Interconnection agreements with adjacent TSOs

IMPLEMENTATION IN FOCUS (4)

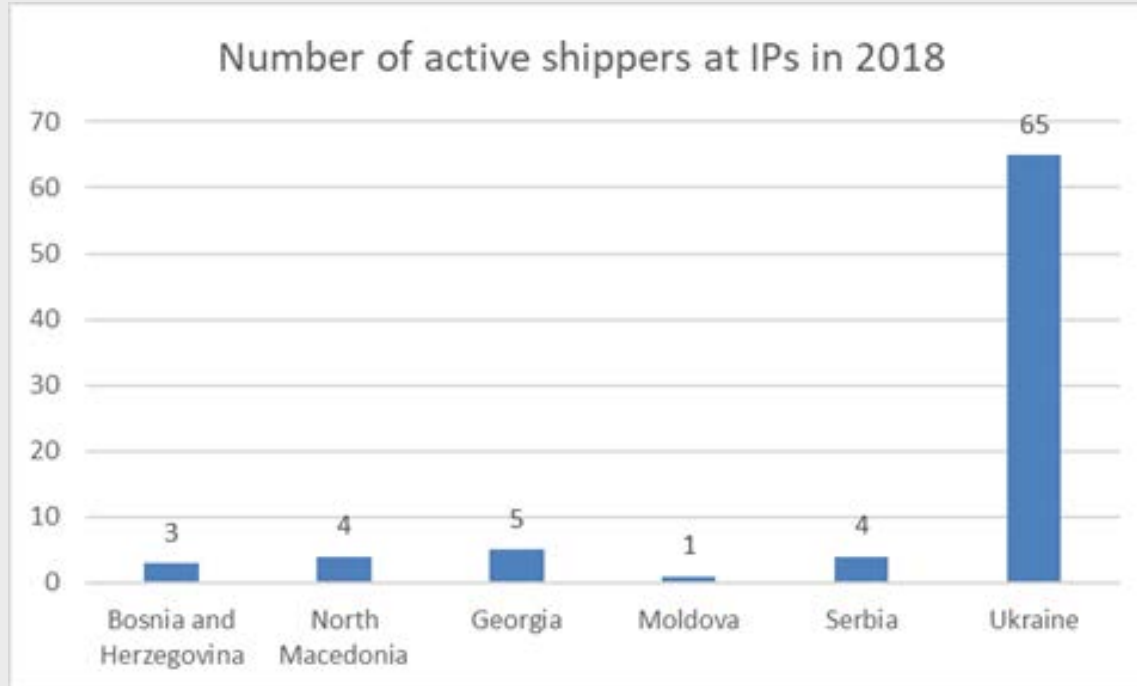
Moldova: moves forward

- An Unbundling plan how to implement an ITO model for Moldovatransgaz tabled by ECS – high hopes
- Many bylaws finally adopted, still, the crucial ones (network codes, T-Tariff, Market rules) under discussion – deadline end of the year
- SoS bylaws in place – however serious concerns about MD preparedness for the winter – MD most dependent country in Europe on the Ukraine transit

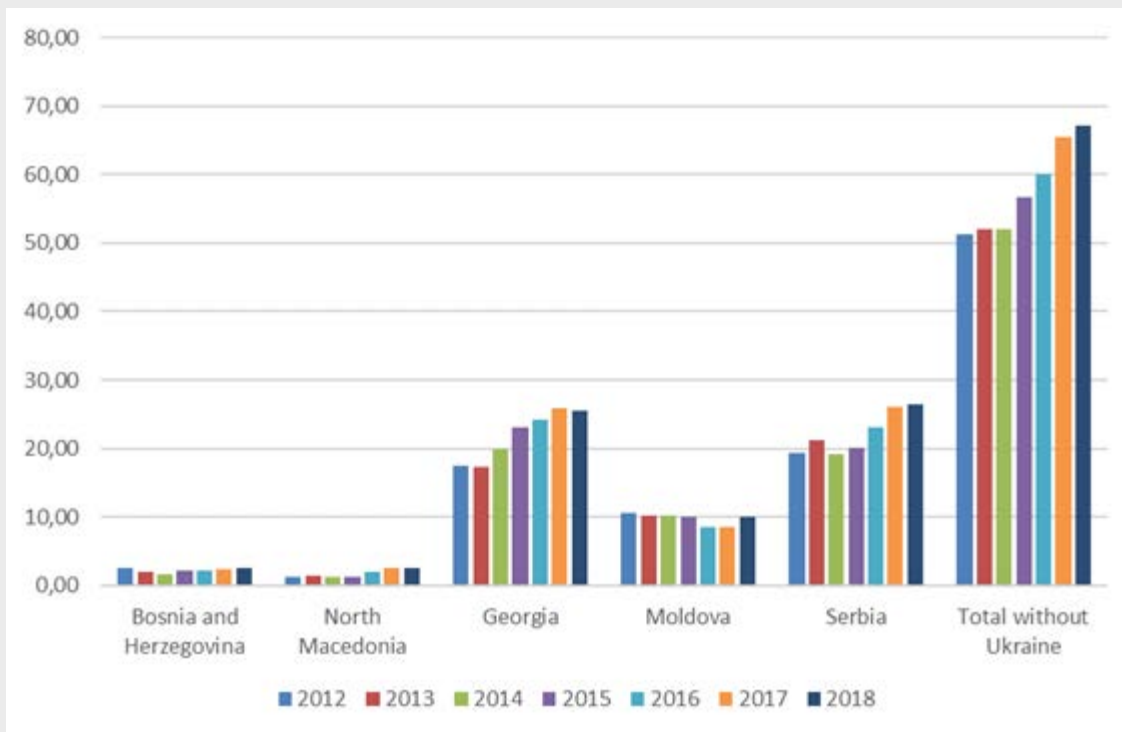
Georgia: still waiting law

- Some bylaws adopted in spite of law missing

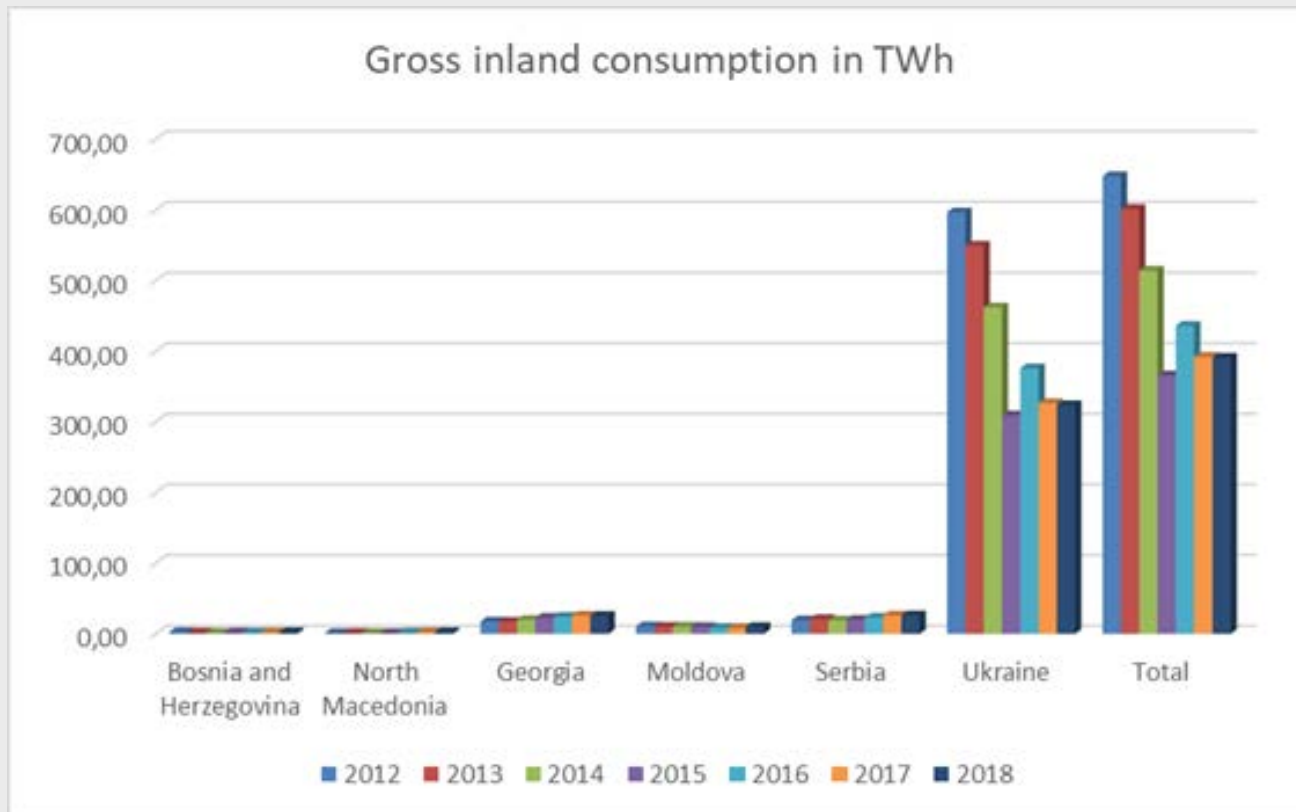
GAS MARKETS – NUMBER OF SHIPPERS AT IPs

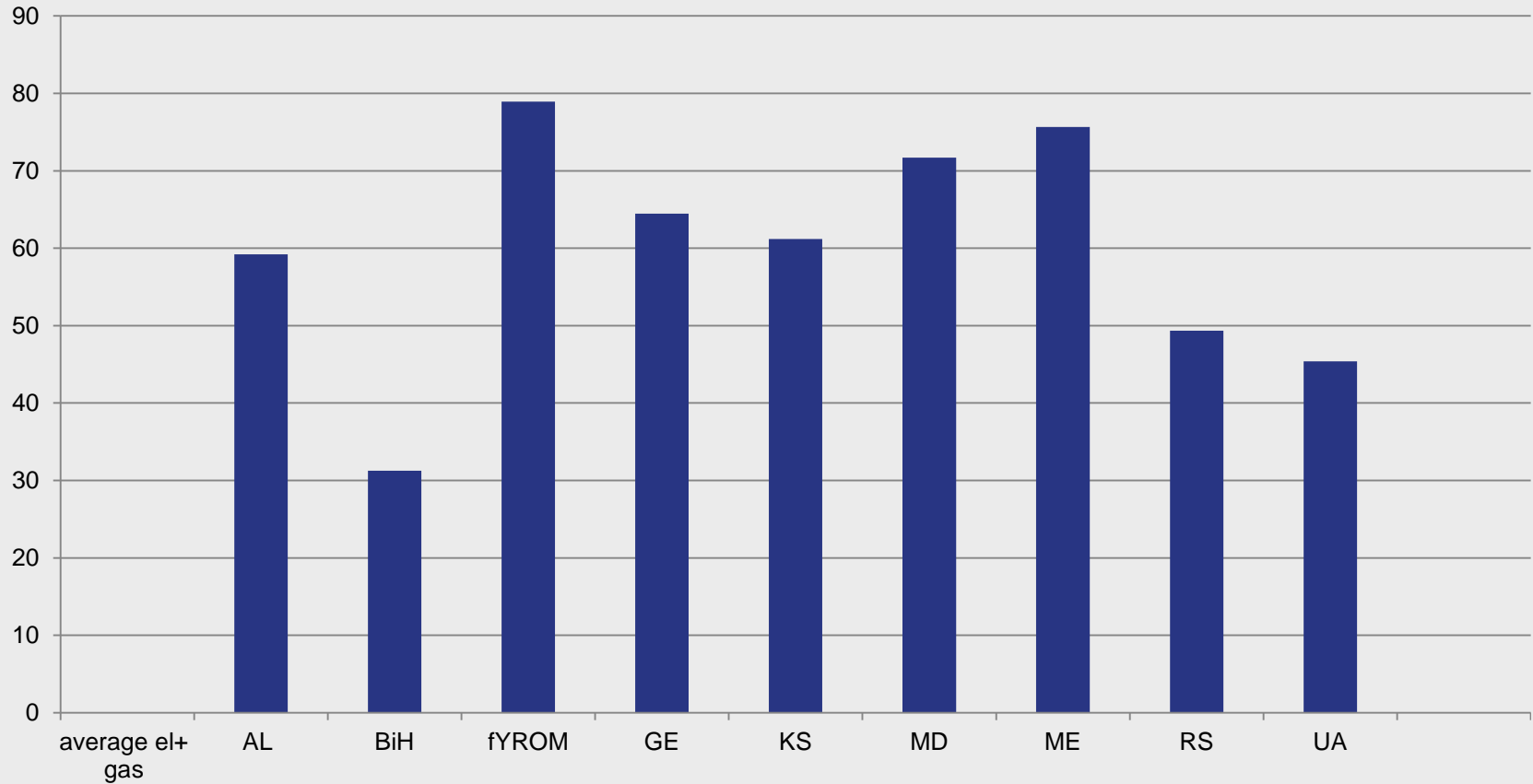


GROSS INLAND CONSUMPTION (IN TWh) – w/o UKRAINE



GAS MARKETS – GROSS INLAND CONSUMPTION (IN TWh)





Georgia

- Transmission and storage tariff methodology (TAR NC);
- Support for the development of Natural Gas Market Rules;
- Support in the regulation on protection of vulnerable customers;
- Regulation on Imposition of Public Service Obligation(s) on Natural Gas Market Participants and Designation of the Natural Gas Supplier of Last Resort.



EU4Energy

Moldova

- IO, CMP CAM and TAR NCs;
- Support to ANRE in the consultation of the Natural Gas Market Rules.

Ukraine

- Distribution tariff methodology and monitoring the quality of gas distribution and supply;
- Support the development of an IT Platform for NEURC for data collection.

**+ High
Level
Policy
Talks**

Projects of Energy Community Interest – Projects of Mutual Interest

- The 2nd PECI/PMI process was concluded in 2018 with the Ministerial Council Decision (PECIs) and Recommendation (PMIs) in October 2018
- Based on the Regulation 347/2013, the Secretariat updated the PECI/PMI Transparency Platform – PLIMA on its website

Projects of Eastern Partnership Interest - PEPI

- The Secretariat supported project promoters in the framework of the EU4Energy program in the EP countries in analyzing gas and electricity infra projects in the same manner as PECIs and PMIs

Treaty amendments – what they will bring



- *New infringement tools – fines*
- *More competences to Competition authorities*
- *Reciprocity*
- *Climate policy*

Sustainability Pillars of the Energy Community Treaty

Acquis on Energy Efficiency

Acquis on Renewable Energy

Acquis on Environment

Acquis on Climate

Preparation of integrated National Climate and Energy Plans from 2018 onwards

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*Thank you
for your attention!*

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