





General updates in the Energy Community


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3rd Package implementation overall

- **Directive 2009/73/EC & Regulation (EC) 715/2009** as adopted by MC Decision 2011/02/MC-EnC
- **Implementation deadline 1 January 2015** (31 December 2020 for Georgia)
- **Network code on Interoperability and Data Exchange* and Guidelines on Congestion Management Procedures**** (1 October 2018)

 Third Package compliant gas law adopted

 Draft gas law, adoption procedure advanced

 Draft gas law exists



Albania: towards access to gas

- Albgaz, a national emerging TSO, unbundled and certified late 2017; capacity building
- ECS support to Ministry and NRA

fYR of Macedonia : new law adopted

- Preparation of secondary acts with ECS assistance; investments in grid

Bosnia and Herzegovina: no state gas law

- Regulatory framework of entities decoupled

Serbia: foreclosed market

- Well developed regulatory framework on paper – no TPA on the HU interconnector in practice
- ECS infringed Serbia for lack of unbundling
- Serbia – Russia IGA brought in comfort with the acquis upon ECS intervention
- Gastrans applied for the exemption

Ukraine: post 2020 transit still uncertain

- Stalemate in unbundling of *Ukrtransgaz* from *Naftogaz*; Selection of a foreign partner for the TSO on hold
- PSO Public Service Obligation Resolution forecloses retail market even further
- Progress on application of gas transmission code – ECS mediation
- Joint EBRD-ECS project to establish a gas exchange

Moldova: some progress under horizon

- Little progress in unbundling (2nd package, derogation valid until 1.1.2020) – *VestMoldTransgaz* sold to Transgaz
- Majority of regulatory acts drafted with ECS assistance, waiting for adoption

Georgia: massive mobilisation to reform gas market soon to materialise

- Draft law and market concept ready – ECS assistance



01/2018



10/2018

1. **First network codes** IO, CMP adopted in January 2018

- Transposition and implementation deadline 1 October 2018

11/2018



09/2019

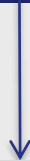


03/2020

2. **Second set** CAM, TAR scheduled for adoption in November 2018

- Transposition + [9] months from adoption
- Implementation + [15] months from adoption

2019



?

3. **Last remaining network code** BAL

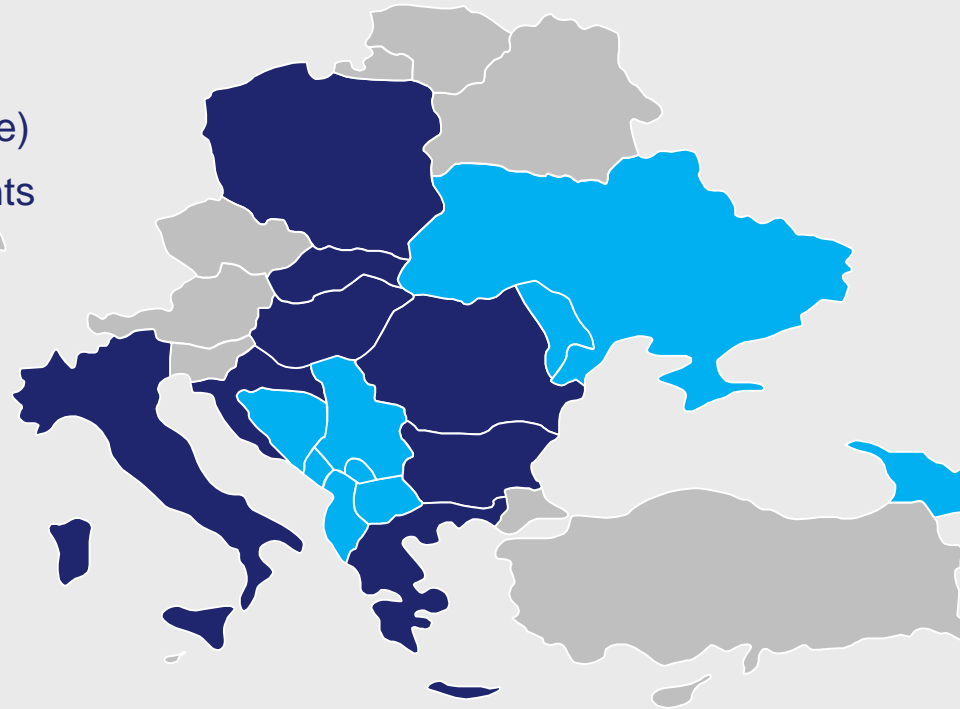
- Negotiations on adaptations to start end 2018/early 2019
- Implementation deadline?

1. **Gas and electricity**
2. **Mutual recognition of licenses**
 - for supply to wholesale customers (trade)
 - based on common minimum requirements
3. **Abolishment** of local establishment requirements
4. Enforcement powers of NRAs
5. Taxation [for CPs only]

Status quo: PENDING



Geographic scope - „Title III countries“



REMIT

Cooperation with ENTSOG

New PECI list in 2018

On a broader level

Reciprocity clause; switch off/on clauses

Treaty amendments try to resolve deficiencies

2030 targets

New network codes direct implementation? SoS Regulation?

The background is a dark blue image of the Earth from space, showing the outlines of continents and city lights. Overlaid on this are numerous glowing blue lines that curve and intersect, representing a global energy network or data flow.

*Thank you
for your attention!*

www.energy-community.org

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