



Customers & Retail Markets WG Activities

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

1. ECRB Retail market monitoring report 2020

 [Approval]

2. Update on other CRM WG activities

 [Information]

3. CRM WG Work Program 2022

 [Approval]



ECRB Market Monitoring Report
Gas and Electricity Retail Markets
in the Energy Community
Reporting period 2020 - Publication December 2021

ECRB MARKET MONITORING REPORT *Gas and Electricity Retail Markets in the Energy Community in 2020*

- **Background**
 - Assess the electricity and gas markets in the EnC
 - Identification of potential barriers
 - Recommendations on potential improvements
- **Report covers**
 - 9 EnC Contracting Parties
- **Methodology**
 - 3 detailed questionnaires to NRAs
(electricity, gas and customer protection)
- **Document approved by CRM WG – 12 Nov 2021**



A. INTRODUCTION

B. FINDINGS: ELECTRICITY

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

C. FINDINGS: GAS

- Market characteristics, Switching, End-user prices, Households 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



- COVID pandemic has had great impact on the retail market
- Total sale to final customers decreased by 2.67%, (consumption of non-households decreased, while consumption of households customers increased (excl. MNG))
- Retail markets still highly concentrated – 3 largest companies' market share above 90%; exceptions UKR 30.2%, MKD 87.8%
- All customers can choose suppliers; dynamics specified in ALB & GEO
- Supplier switching: No (ALB, GEO & MNG); limited (BIH, KOS* & MLD); several thousands (MKD, SRB & UKR) – however, annual switching rate still less than 1% (MKD 1.85%)
- End-user electricity prices for households vary substantially (from 4.3 euro cents/kWh in UKR to 10.31 in MLD) – EU: 21.3
- End-user electricity prices for industry: from 4.82 in GEO to 12.83 in ALB, EnC average prices were 68% of the EU level
- Households prices regulated in all CPs (except MNG)



- ALB, KOS* & MNG do not have gas markets
- In the period 2012-2020 gas consumption increased (32%) in EnC\UKR, while in UKR the demand decreased by 47%
- Number of active suppliers ranged from 3 (MKD) to 286 (UKR)
- End-users of gas supplied mainly by regional retail suppliers, only in GEO, MLD, SRB & UKR distribution networks with more than one supplier; customers connected to transmission networks supplied by one supplier in MLD & SRB
- All customers can choose suppliers, but switching rates are low 2020 households switching only in UKR (5.35%), non-households: UKR (7.48%), MLD (0.32%) & SRB (0.12%)
- End-user HH gas and industry prices decreased (except BIH); HH still much lower than EU average, industry prices almost at EU level; cross-subsidization reduced
- Regulated end-user prices for HH (exception MKD & UKR);
- For non-households end-user prices were not regulated in BIH, MKD & GEO



- Electricity SLR appointed in all CPs except GEO
- Gas SLR exists in ALB, MKD, BIH, SRB & UKR
- HH disconnections due to non-payment in electricity vary substantially (0.5% – 5.96%) *previous report (1.5% – 9.62%)*
- 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 1.9% in MKD to 6.81% in KOS*
- No definitions of energy poverty
- Customers informed about price changes in advance
- Monthly billing based on actual consumption in all CPs
- Intelligent (smart) metering systems roll-out increased in BIH, KOS*, MNG, SRB & UKR (HH share: SRB 0.9% – MNG 82.83%); CPs could consider incentive schemes in this roll-out
- Wide choice of payment methods
- Mostly reasonable timelines for processing complaints; NRAs have the role of Alternative Dispute Resolution body

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Work Program 2021

2021 CRM WG Meetings

- 48th meeting, online, 26 January 2021
- 49th meeting, online, 25 May 2021
- 50th meeting, Vienna+online, 28 October 2021

CRM WG Deputy Chair

Mrs Anastasija Stefanovska Angelovski

2021 Task Forces

TF1 – Retail Market Monitoring

Co-Leaders: Mr Igor Telebak, Mr Aca Vučković

TF2 – Customer Protection

Leader: Mr Florian Pichler

TF3 – Quality of Supply

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

TF4 – District Heating

Leader: Mr Petrit Haziri

ACER/CEER

Annual Report on the Results of Monitoring the Internal Electricity and Natural Gas Markets in 2020

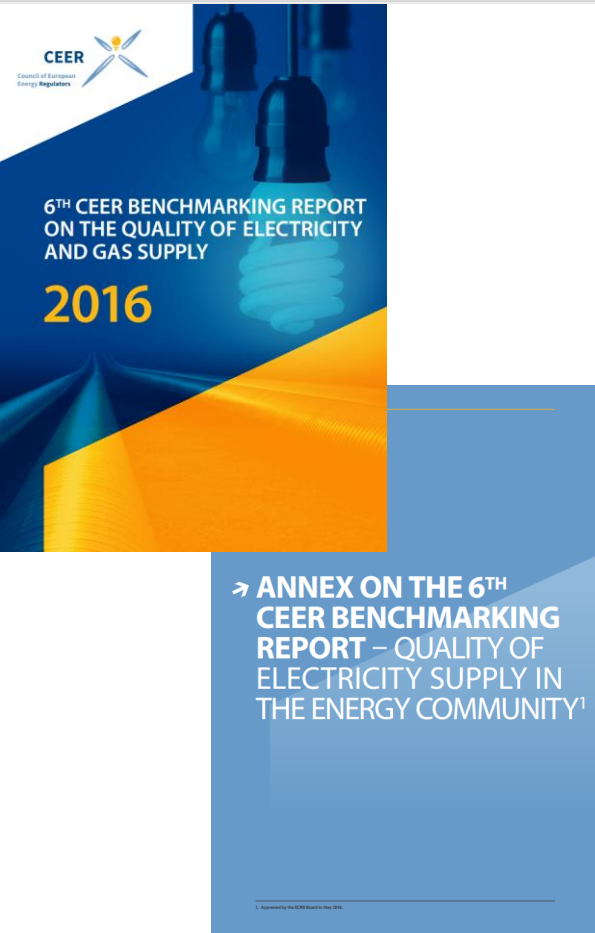
Energy Retail Markets and Consumer Protection Volume

November 2021

WS1: ECRB MARKET MONITORING REPORT *Gas and Electricity Retail Markets in the Energy Community in 2020*

WS2: *Input to the annual market monitoring report of ACER/CEER on retail market developments*

- NRAs completed questionnaire on electricity and gas offer breakdowns of household prices
- ECRB Section shared additional data with ACER and CEER needed for MMR 2020 (number of suppliers, price regulation, billing, SoLR, vulnerable customers etc.)
- ACER/CEER published the results on 9 November 2021 ([Energy Retail Markets and Consumer Protection Volume](#))



WS1: Joint CEER-ECRB benchmarking report on QoS

- Special TF established (Commercial quality, Voltage quality & Continuity of supply, Gas quality)
- Close contact with CEER (joint sessions of ECRB CRM WG and CEER QoS TF)
- Delay in finalizing deliverables due to the pandemic
- Changes in the CEER drafting team
- Numerous consultations between current drafting team members
- The drafting of the 7th Benchmark Report on Quality of Electricity and Gas Supply is ongoing, some chapters prepared
- Activities to be concluded in 2022



TF2: Customer Protection

***3rd Trilateral CEER-ECRB-MEDREG Workshop
(online, 26 and 27 May 2021)***

TF3: Quality of Supply

***WS2: Input to quality of supply related deliverables
of ECDSO-E***

TF4: District Heating

***Regulatory contribution to the Energy Community
Heating & Cooling Network activities***

***(Discussion paper by the Energy Community Secretariat
on Tariff Setting in District Heating)***

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TF1 – Retail Market Monitoring

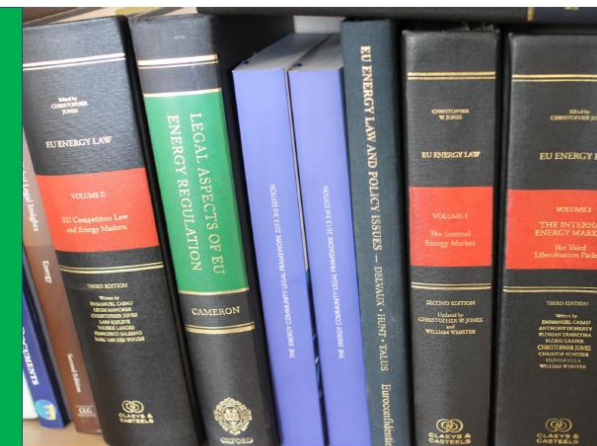
Co-Leaders: Mr Igor Telebak, Mr Aca Vučković

- Retail Markets Monitoring Report
- Input to the annual market monitoring report of ACER/CEER on retail market and consumer protection developments

TF2 – Customer Protection

Leader: Mr Florian Pichler

- Joint ECRB-CEER-MEDREG customer workshop
- Status review of implementation of consumer protection rules of the new Electricity Directive in the CPs



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TF3 – Quality of Supply

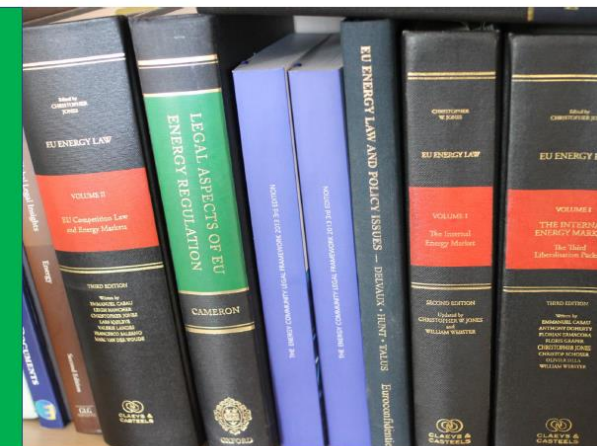
Co-Leaders: Mrs Anastasija Stefanovska Angelovski,
Mr Nikola Dubajić, Mr Rodion Koval

- Joint CEER-ECRB benchmarking report on quality of supply

TF4 – NRAs' Public Outreach

Leader: Mrs Salome Janelidze

- Status review of public outreach tools employed by NRAs



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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. The lines are bright and have a slight motion blur effect.

*Thank you
for your attention!*

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