

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

# ***Retail market monitoring and customer protection***

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## ECRB CRM WG Retail Market Monitoring - completed reports:

*For 2014 – Albania, Bosnia and Herzegovina, FYR of Macedonia, Kosovo\*, Montenegro, Serbia and Ukraine*

*For 2016 – Albania, Bosnia and Herzegovina, FYR of Macedonia, Georgia, Kosovo\*, Moldova, Montenegro, Serbia and Ukraine*

# Procedure – steps

- *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*

# Content of the market monitoring report

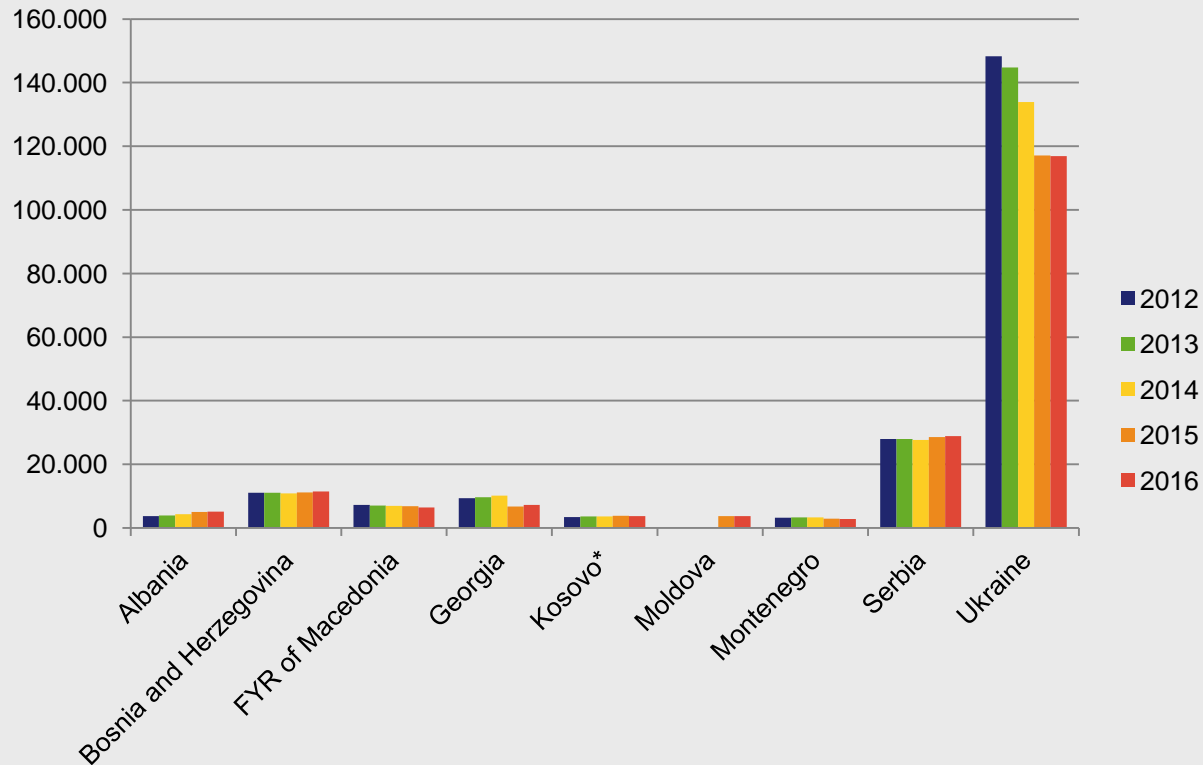
- *Electricity retail market*
- *Natural gas retail market*
- *Customer protection*

# *ELECTRICITY RETAIL MARKET*

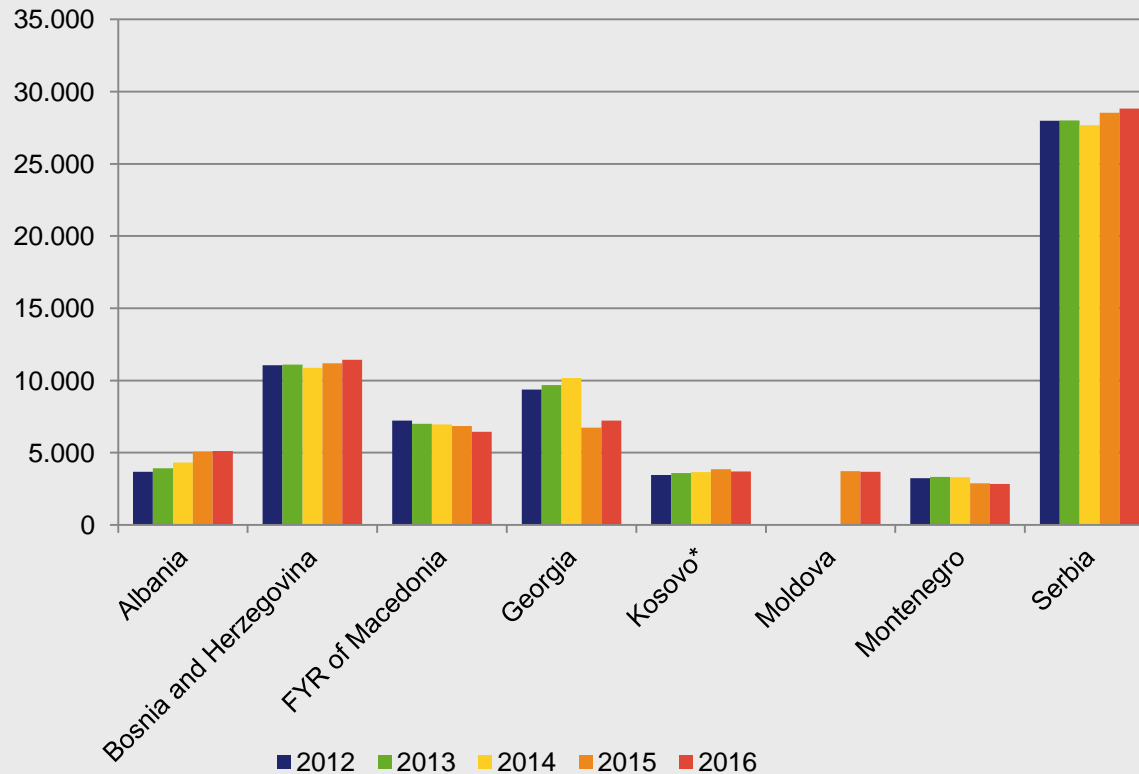
# Questionnaire for electricity

- *Description of retail market (electricity 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 (EUROSTAT and NRA data for GEO, MDA, UKR)*

# Total electricity sale to final customers in GWh 2012-2016

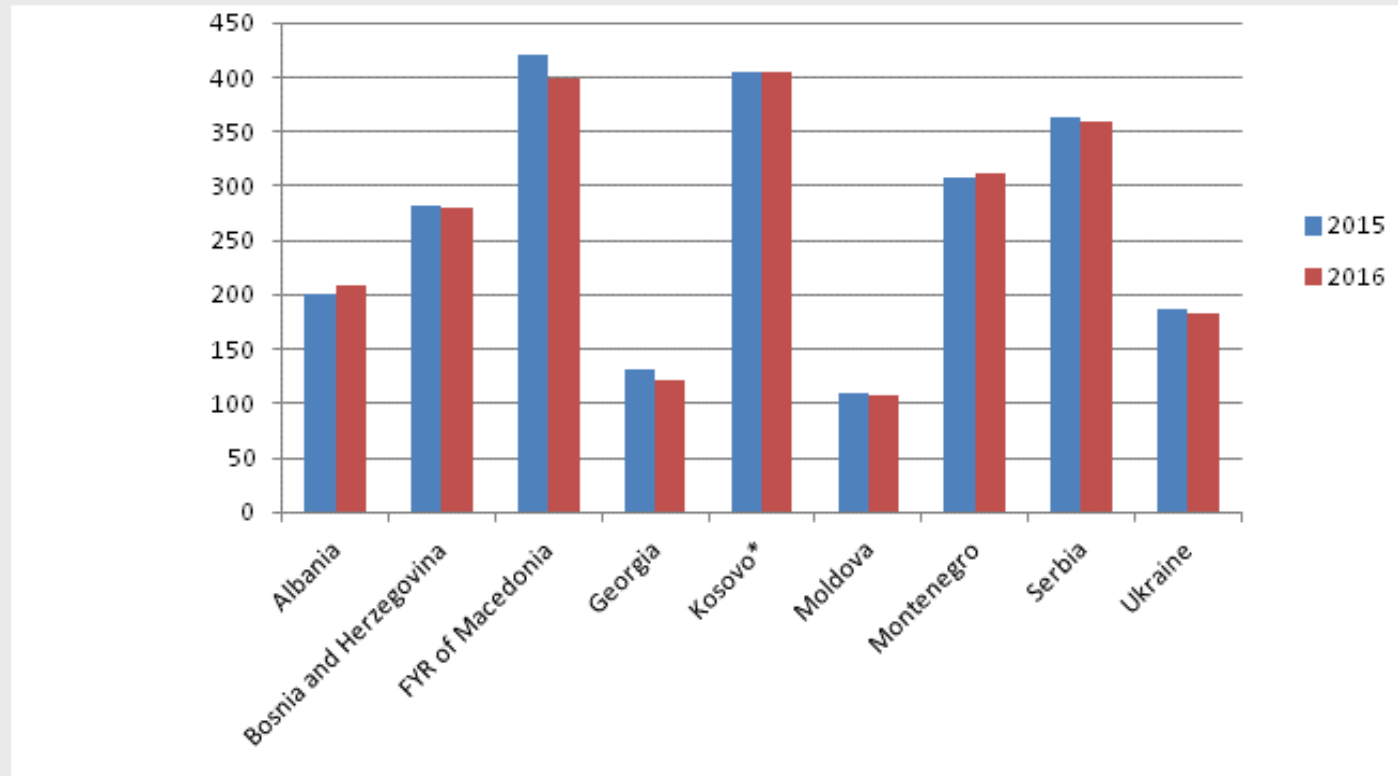


# Total electricity sale to final customers in GWh 2012-2016 (excluding Ukr.)





## Average monthly consumption of electricity per household in 2015 and 2016 (kWh)



## Number of suppliers in retail electricity markets in 2016

	Number of licensed electricity suppliers	Total number of active electricity suppliers
<b>Albania</b>	41	20
<b>Bosnia and Herzegovina</b>	32	13
<b>FYR of Macedonia</b>	77	12
<b>Georgia</b>	3	3
<b>Kosovo*</b>	3	1
<b>Moldova</b>	17	3
<b>Montenegro</b>	5	2
<b>Serbia</b>	60	14
<b>Ukraine</b>	37	124

## Electricity retail market concentration

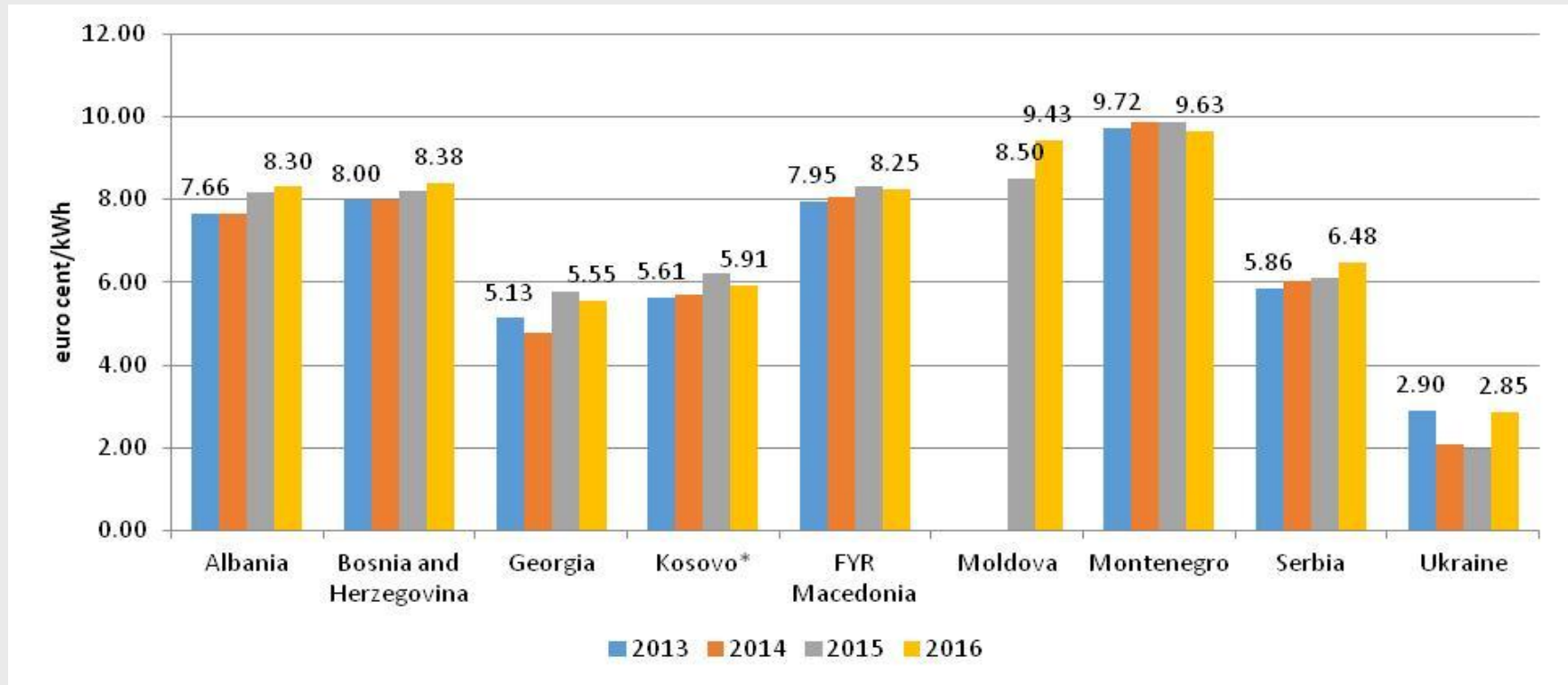
	Number of electricity retailers selling at least 5% of total electricity consumed by final customers	Market share of the 3 largest companies in the retail market (aggregated) in %
<b>Albania</b>	1	96.00%
<b>Bosnia and Herzegovina</b>	3	95.11%
<b>FYR of Macedonia</b>	3	84.69%
<b>Georgia</b>	2	100%
<b>Kosovo*</b>	1	100%
<b>Moldova</b>	2	100%
<b>Montenegro</b>	1	100%
<b>Serbia</b>	1	98.57%
<b>Ukraine</b>	4	32.76%

## Annual switching rates in electricity markets in 2016 (in %)

	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)	Annual switching rate in the <u>whole retail market</u> (by volume)
Albania	1,189,478/10	na	na
Bosnia and Herzegovina	1,531,501/58	0.004	2.815
FYR of Macedonia	428/371	15.171	16.510
Georgia			
Kosovo*	536,393/1	nap	nap
Moldova	1,354,804/1	0.000	0.000
Montenegro	367,880/4	0.000	0.000
Serbia	3,624,625/106,081	0.300	3.500
Ukraine	17,076,137/1,272	0.012	1.770

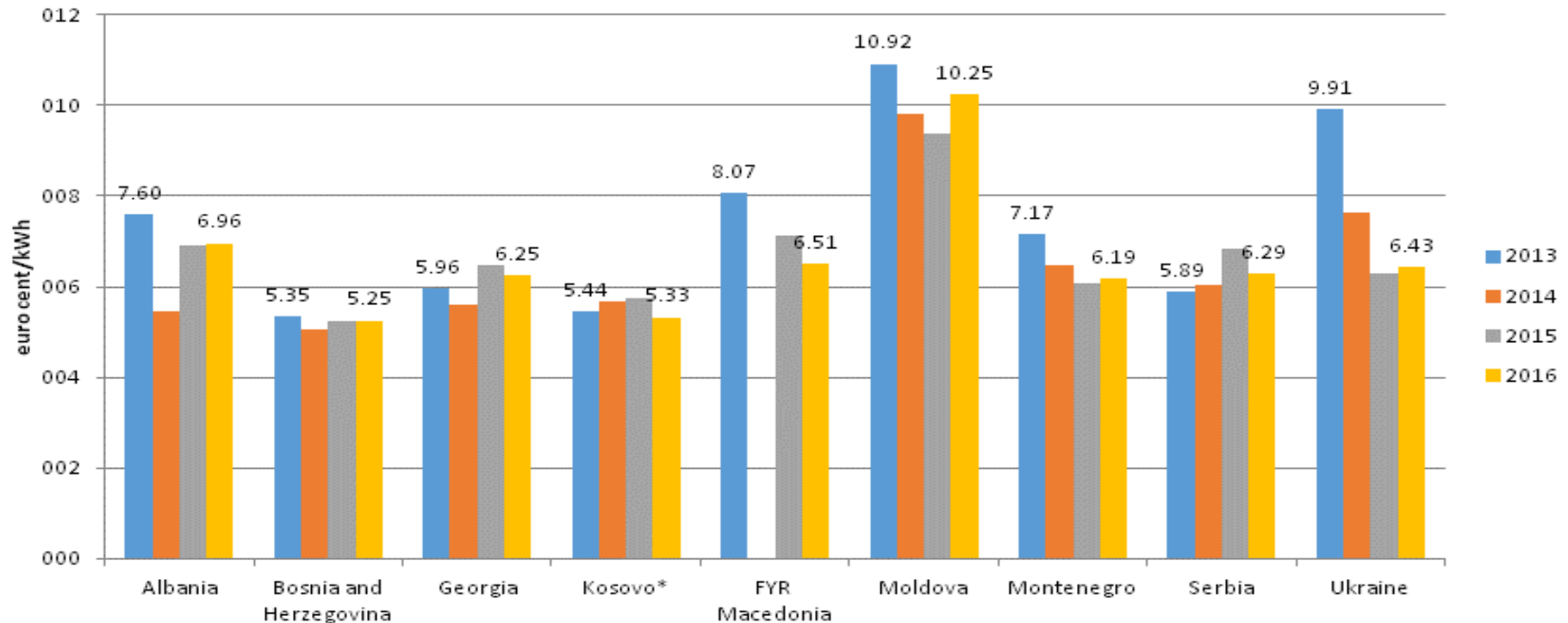
## Electricity prices for households 2013-2016 (euro cent/kWh)

Eurostat data, yearly consumption 2,500-5,000 kWh, NRA data for GEO, MOLD, UKR



## Electricity prices for industrial consumers 2013-2016 (euro cent/kWh)

Eurostat data, yearly consumption 20,000-70,000 MWh , NRA data for GEO, MOLDO, UKR



## Number of non-households (number of metering points) supplied at non-regulated electricity prices in 2016

<b>Albania</b>	10
<b>Bosnia and Herzegovina</b>	10,133
<b>FYR of Macedonia</b>	371 consumers - 8,516 metering points
<b>Georgia</b>	0
<b>Kosovo*</b>	1
<b>Moldova</b>	0
<b>Montenegro</b>	4 consumers
<b>Serbia</b>	104,862
<b>Ukraine</b>	not available

# *NATURAL GAS RETAIL MARKET*

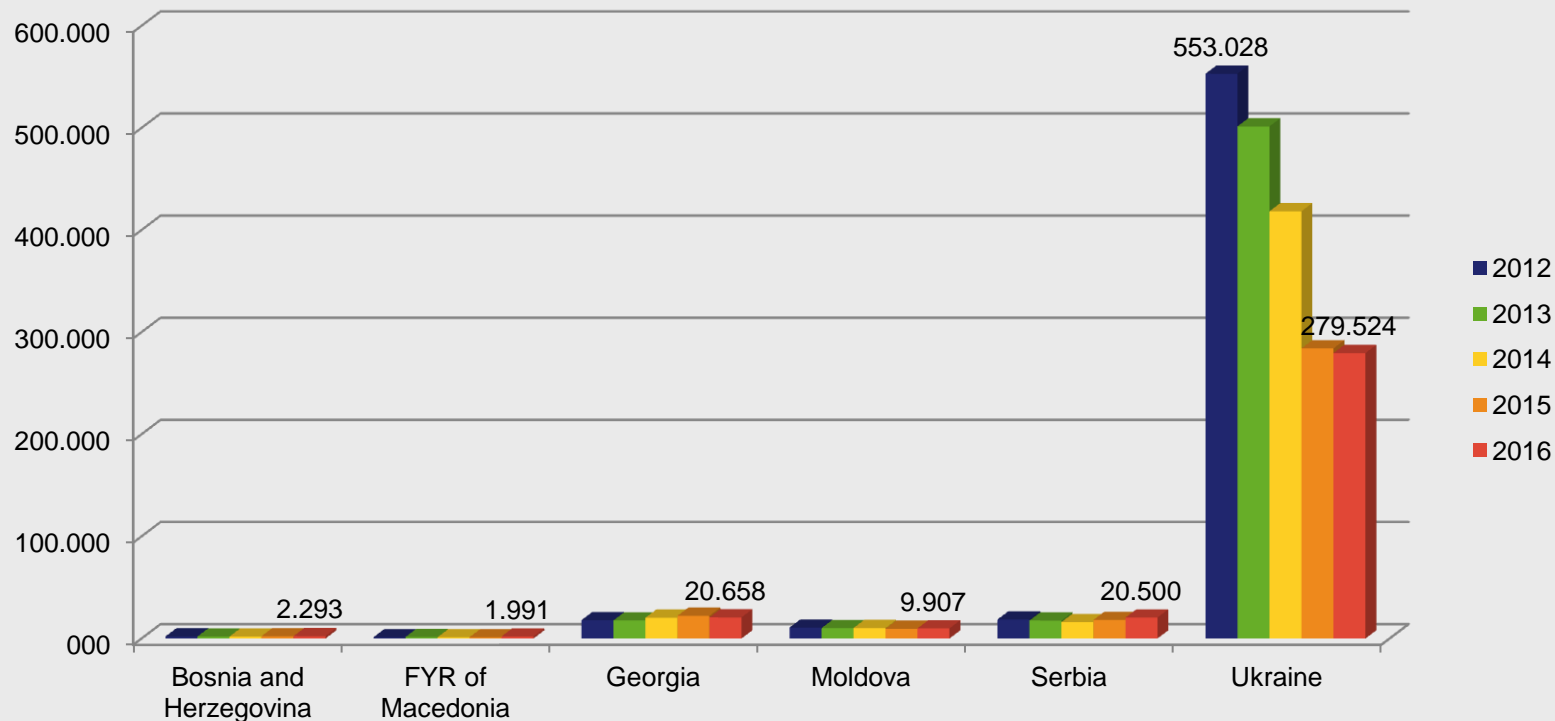


# Questionnaire for gas

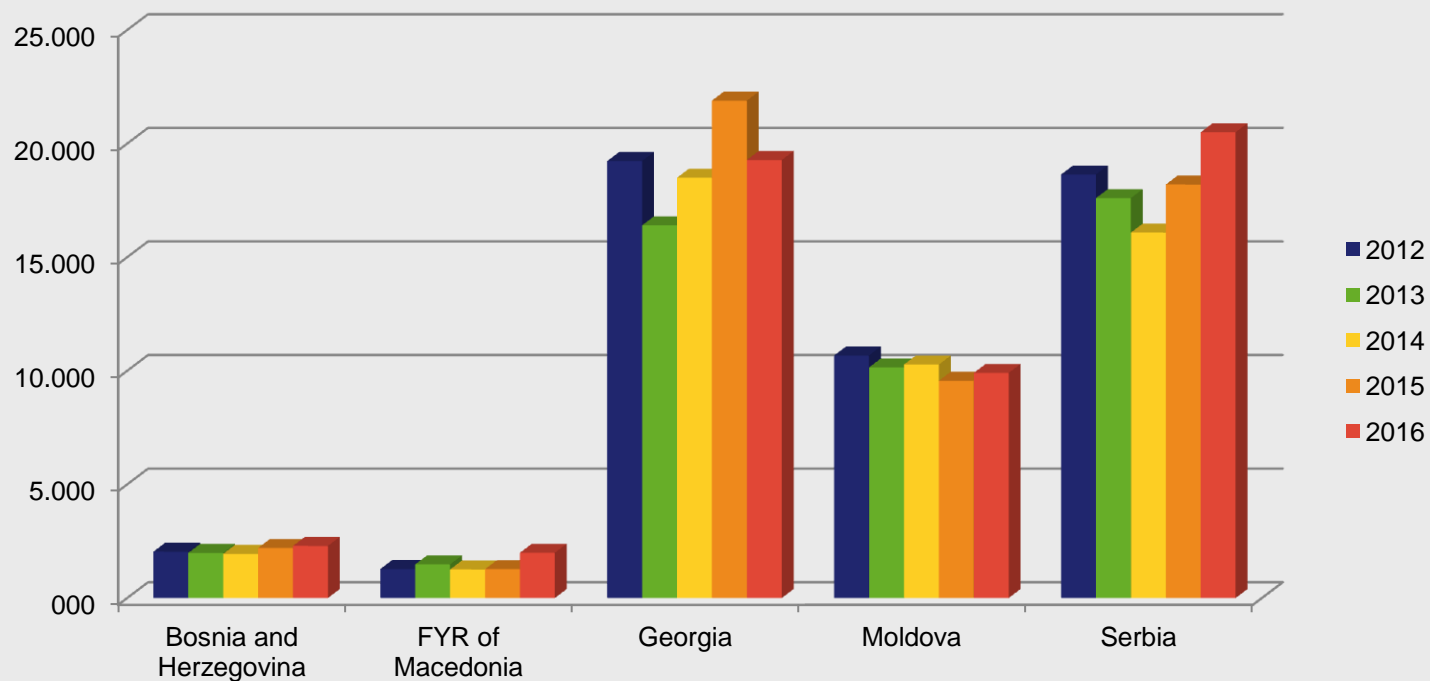
- *Description of retail markets (gas sales, data on customers, data on suppliers)*
- *Pricing for households and industrial customers (EUROSTAT and NRA data for GEO, MDA, UKR)*
- *Description of regulated end user prices*
- *Switching supplier*

# Gas consumption trend(1)

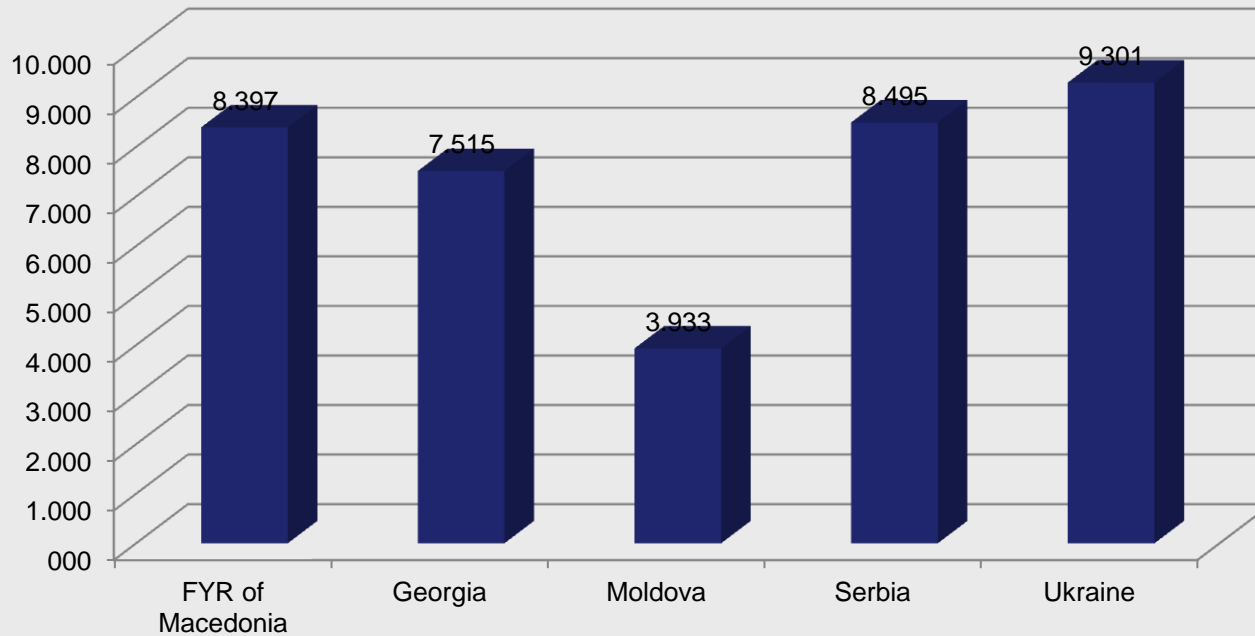
## Total sale of gas to final customers 2012- 2016 (in GWh)



## Total sale to final gas customers in GWh (excluding Ukraine)



## Average annual gas consumption per household in 2016 (in kWh)



## Number of active gas suppliers in 2016

	Number of active gas suppliers	Number of active nationwide suppliers
<b>Bosnia and Herzegovina</b>	3	0
<b>fYR of Macedonia</b>	6	3
<b>Georgia</b>	35	35
<b>Moldova</b>	9	1
<b>Serbia</b>	65	38
<b>Ukraine</b>	~200	~200

## Retail gas market concentration in 2016

	Number of gas retailers selling at least 5% of total gas consumed by final customers	Market share of the 3 largest companies in the retail market (aggregated) in %
<b>Bosnia and Herzegovina</b>	3	100%
<b>fYR of Macedonia</b>	4	92.59
<b>Georgia</b>	3	80%
<b>Moldova</b>	3	98%
<b>Serbia</b>	1	84.40%
<b>Ukraine</b>	3	57.78%

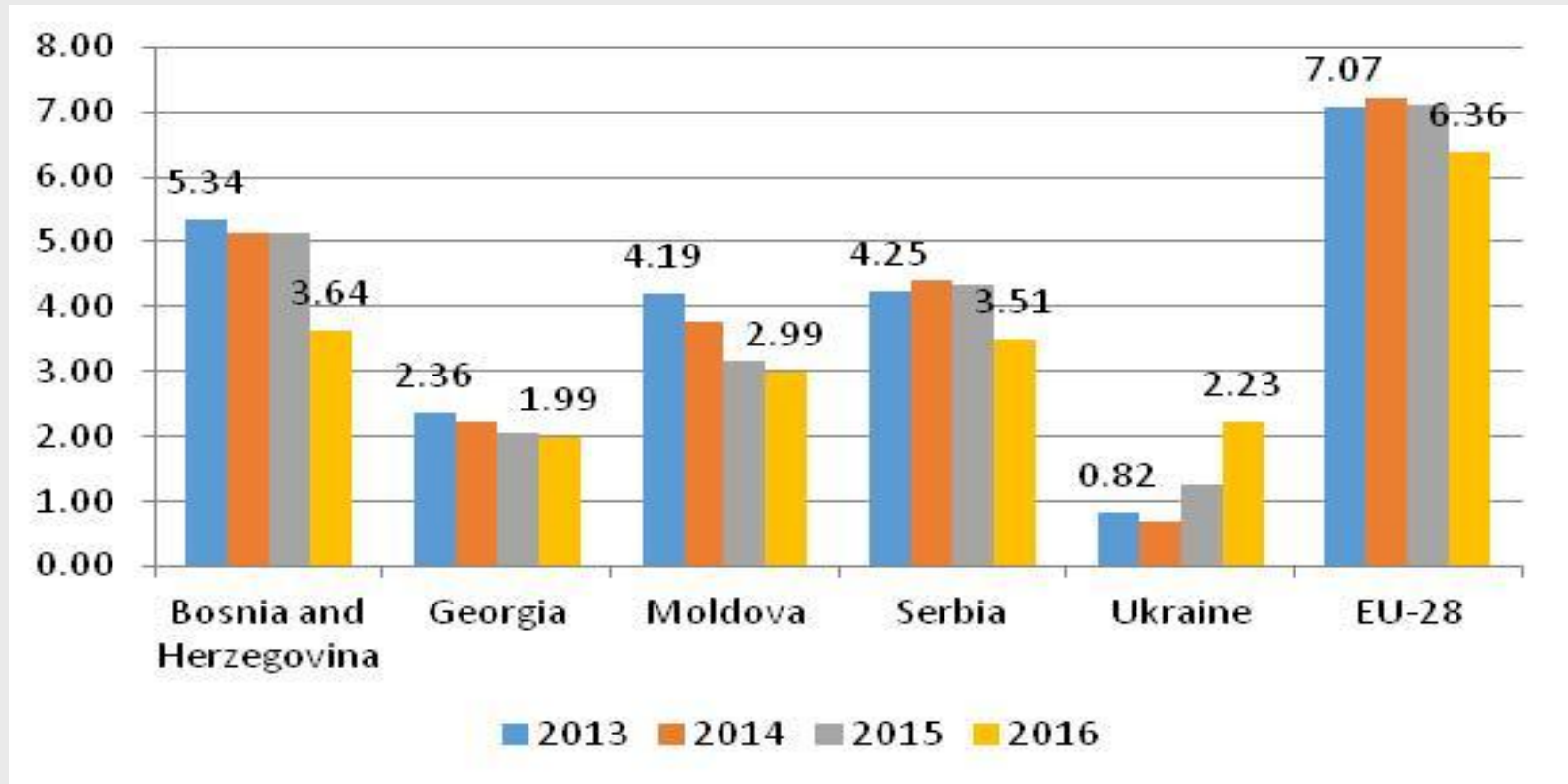
**All gas customers in the EnC CPs were eligible to choose their supplier. However household customers in none of the markets changed their suppliers in 2016. For non- households the information on switching rates has been provided for:**

- fYR of Macedonia: 0.93% of non-household customers, measured by number of metering points, changed supplier in 2016. The switching rate measured by volume added up to 3.53%.
- Serbia: 0.17% of non- households changed their supplier in 2016 which corresponds to a switching rate of 4.35% by volume.

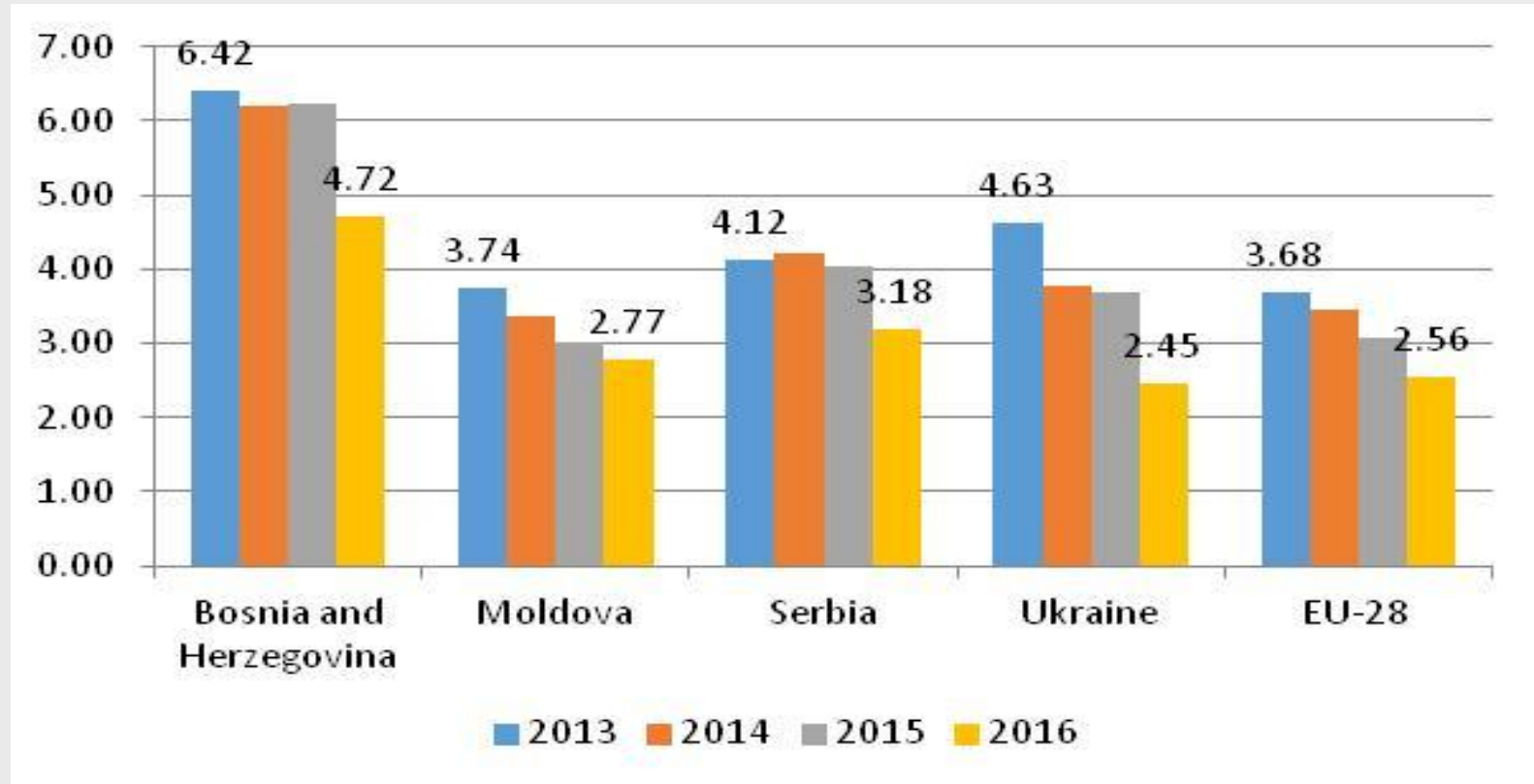
In Bosnia and Herzegovina and Moldova none of the customers changed their supplier in 2016, while for the other Contracting Parties this information is not available.

In Georgia, there were few non-household customers who switched but exact information is not available.

# Gas household prices







End-user gas prices for **household customers were regulated in all CPs in 2016**, with the exception of FYR of Macedonia. In Georgia household customers connected to the grid after 1 August 2008 were supplied under non-regulated prices in 2016.

Application of price regulation for industry differs among CPs:

- In Bosnia and Herzegovina (Republika Srpska), FYR of Macedonia and Georgia end- user prices for industry are not regulated;
- In Serbia and Ukraine certain industry categories may buy gas at regulated prices – i.e. small and medium enterprises with a yearly consumption up to 100.000 m<sup>3</sup> and connected to the distribution system in Serbia; and district heating companies and religious organizations in Ukraine;
- In Moldova all industry customers were supplied at regulated prices.

# *CUSTOMER PROTECTION*

# Questionnaire for consumer protection

- 1. Supplier of last resort and disconnections*
- 2. Vulnerable customers*
- 3. Consumer information*
- 4. Complaint handling and dispute resolution*
- 5. Service quality provided by DSOs*

# 1. Supplier of last resort and disconnections



In what circumstances may a household customer turn to the "supplier of last resort" to ensure continuous energy supply?	Number of countries – electricity	Number of countries - gas
If a household customer does not find supplier on the market	5	4
If a household customer is dropped by its current supplier because of non- payment	3	0
The current supplier has gone bankrupt and is no longer doing business	5	5
The license of the current supplier has been revoked	6	5
If a final household customer does not choose a supplier in the open market	5	4
If a fix- term supply contract expires	5	3
Other reasons (please explain)	0	1*
There is no supplier of last resort in the country	1	0

# 1. Supplier of last resort and disconnections



How many days (at least) does it take to disconnect a final household customer from the grid because of non-payment?

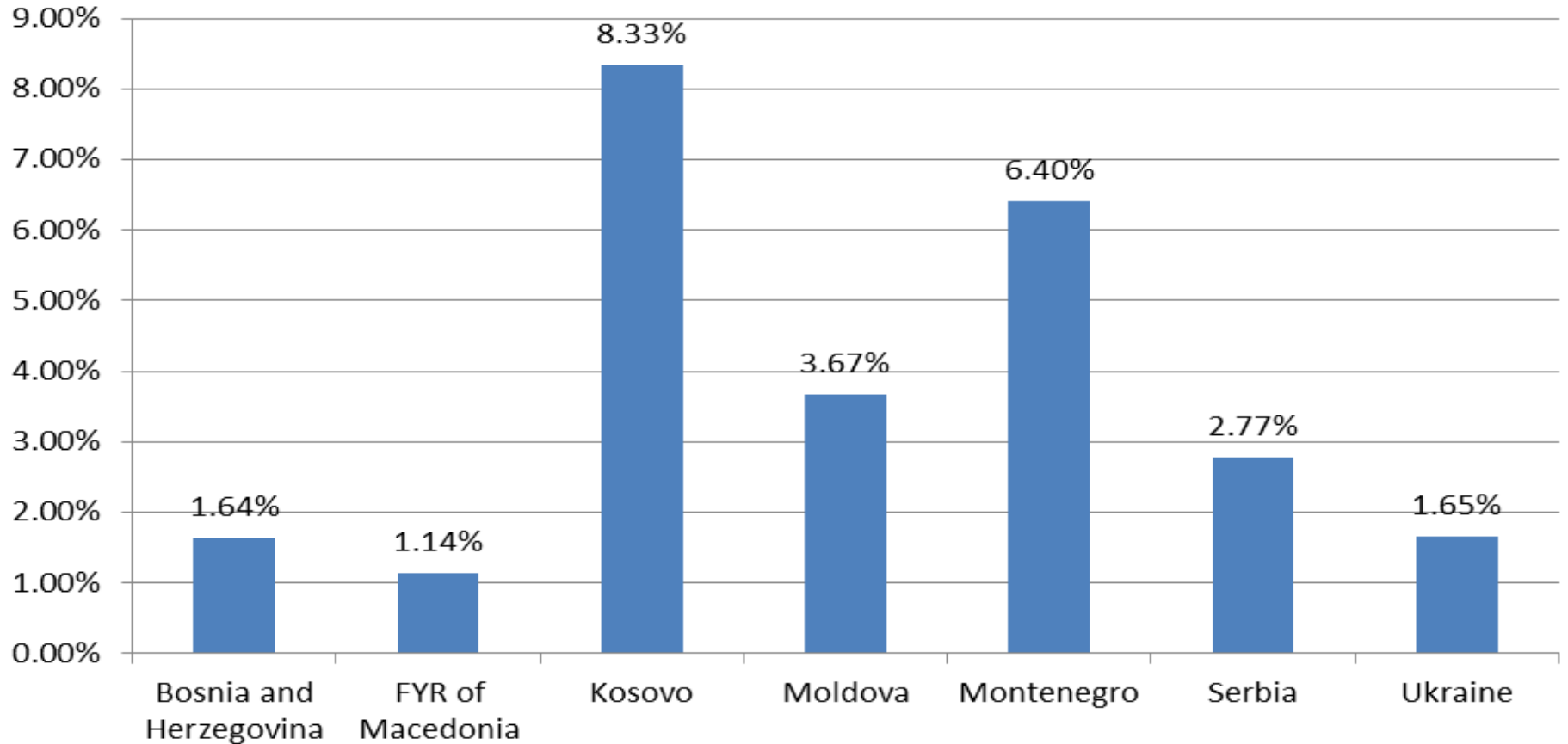
Starting date is due date of payment.

Legal

In practice

	Legal	In practice
Albania	30	30 - 45
Bosnia and Herzegovina	FBIH 30, RS 21 (8+8+5), BD 60	FBIH & BD approx 60, RS 8 - 25
fYR of Macedonia	NA	60
Georgia	15	15-17
Kosovo*	30	45
Moldova	10	Up to 20
Montenegro	8	More than 8
Serbia	38	NA
Ukraine	50	54

# 1. Supplier of last resort and disconnections

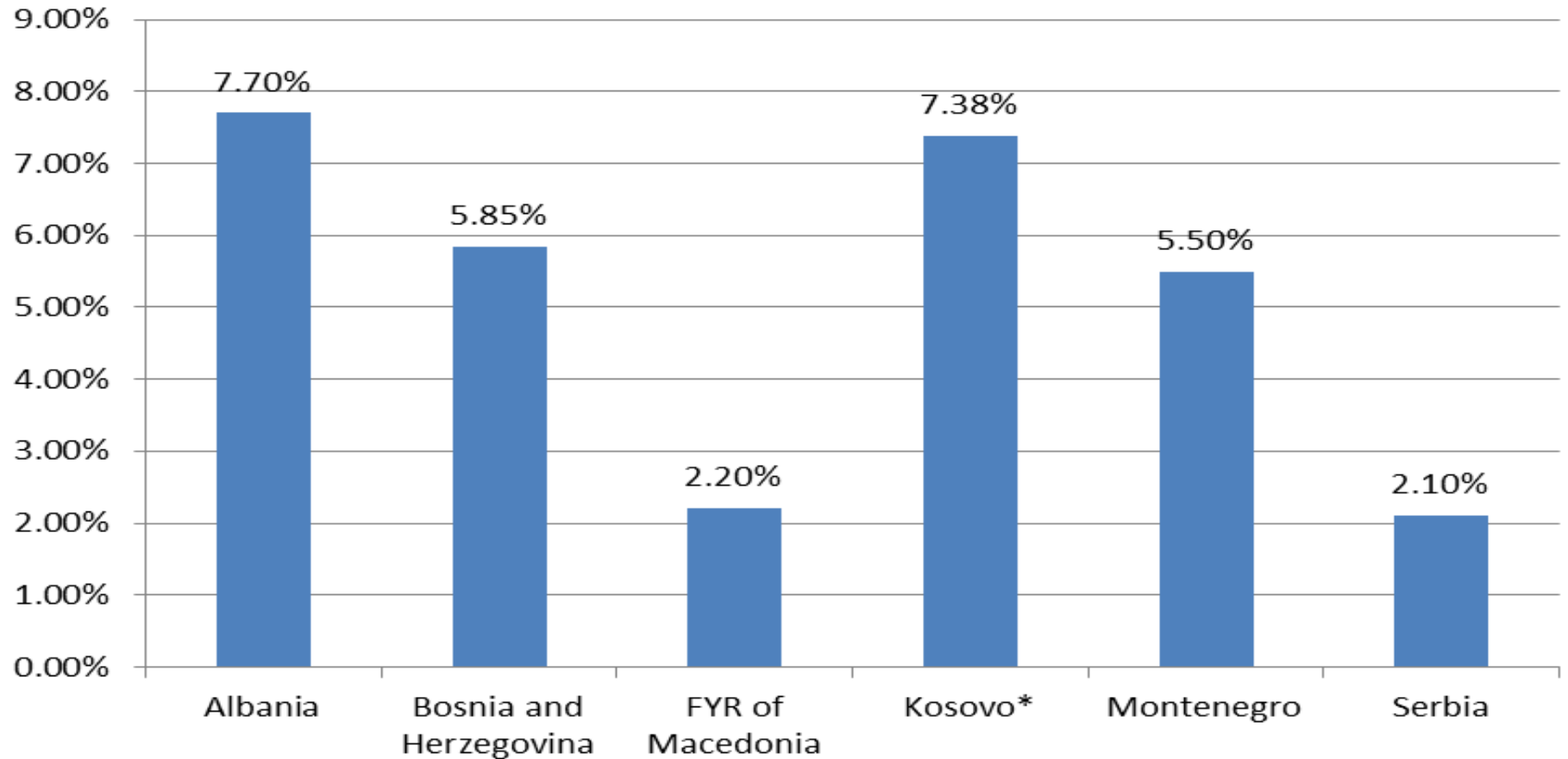


## 2. Vulnerable customers

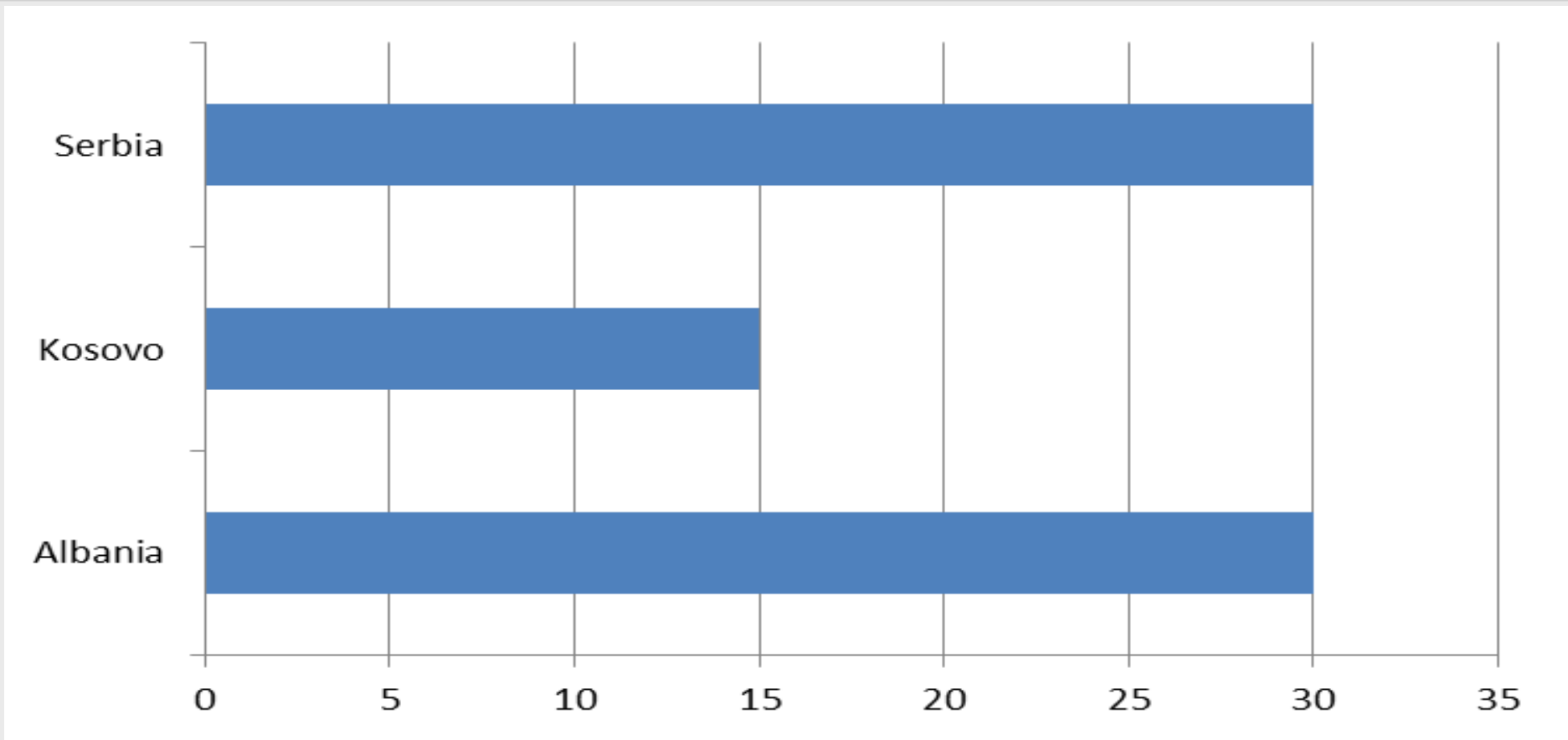
Measures to protect vulnerable customers	Number of countries - electricity	Number of countries – gas
Restrictions on disconnection due to non-payment	7	4
Earmarked social benefits to cover (unpaid) energy expenses	6	2
Special energy prices for vulnerable customers	0	0
Additional social benefits to cover (unpaid) energy expenses (non-earmarked financial means)	0	0
Free energy-saving advice to vulnerable customers	1	1
Right to deferred payment	3	3
Exemption from some components of final customer energy costs (e.g. energy price, network tariffs, taxes, levies...)	0	0
Financial grants for the replacement of inefficient appliances	0	0
Free basic supply of energy	1	0
Other	1	0



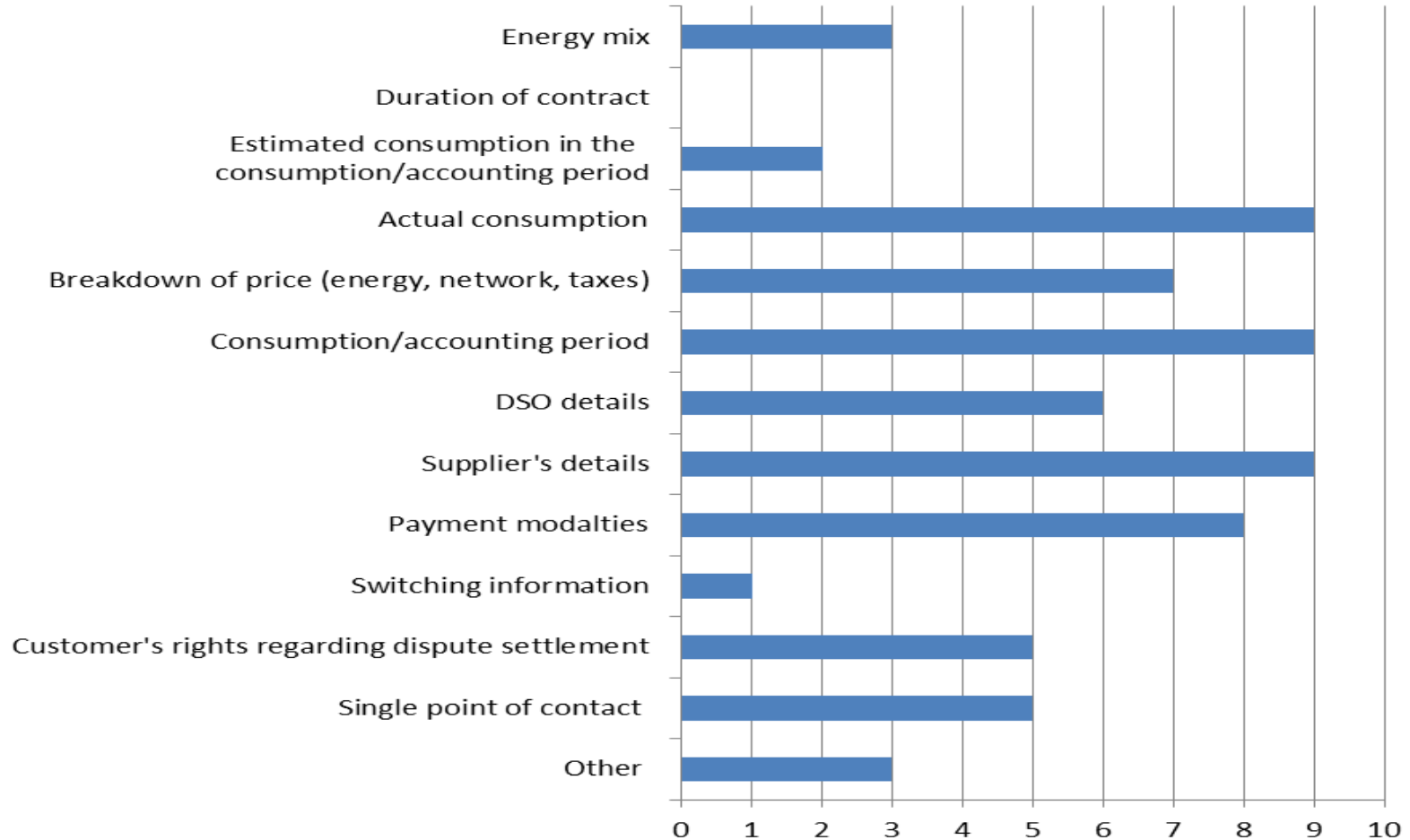
## 2. Vulnerable customers



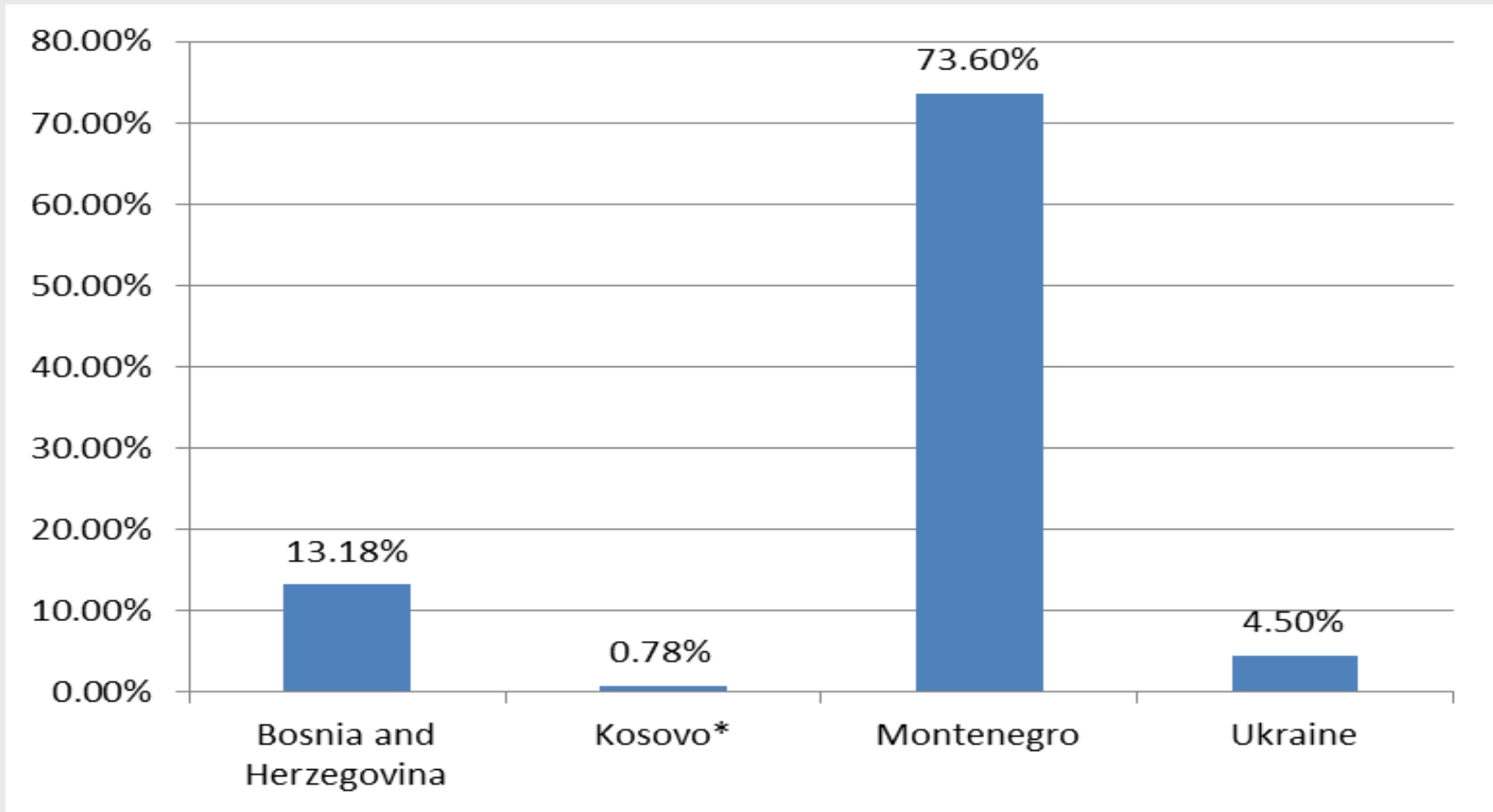
# 3. Customer information



# 3. Customer information



# 3. Customer information



# 3. Customer information



## Single point of contact:

- *in Albania and Serbia there is no point of contact for customers to obtain independent information about their rights;*
- *in Bosnia and Herzegovina, fYR of Macedonia, Georgia, Kosovo\*, Montenegro and Ukraine there are several points of contact (usually national regulatory bodies, Ombudsman and customer associations).*

### 3. Customer information



- *Legally prescribed number of working days for **supplier switching** in the Energy Community Contracting Parties usually is 21 (Bosnia and Herzegovina, Kosovo\*, Serbia and Ukraine)*
- *In Albania the maximum period is 11 days,*
- *In fYR of Macedonia 23 days,*
- *In Moldova 20,*
- *In Montenegro 15 days.*

*The switching process may be stopped due to various reasons which are different from country to country*

# 4. Customer complaints



	Suppliers	DSOs	ADR	NRA
Albania	NA	NA	957	
Bosnia and Herzegovina	11725	31755		301
fYR of Macedonia	9196	NA	25	
Georgia	NA	NAP	3345	
Kosovo*	11180	349		235
Moldova	NA	NA		593
Montenegro	NA	NA	95	
Serbia	NA	NA	282	
Ukraine	247203		1305	

# 5. Service quality of DSOs



- *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 connected to the network and activate energy supply to a consumer (starting from the date of consumer's request to be connected);*
- *Maximum number of days to disconnect the energy supply following a consumer request; and*
- *Maximum duration of a planned supply interruption.*



# 5. Service quality of DSOs



- *There is no legal requirement in **Bosnia and Herzegovina, fYR of Macedonia, Georgia, Montenegro, Serbia and Ukraine** related to the indicator of the maximum duration of a planned supply interruption*
- *In **Albania** - two to 24 hours depending on the area (legal)*
- *In **Kosovo\*** - six hours (legal), in practice two to six hours*
- *In **Moldova** - more than 24 hours in case of major overhauls of electricity networks and 24 hours in case of capital and complex works in the distribution networks.*

***Thank you for your attention!***