

30th Energy Community Electricity Forum

4 – 5 June, Athens

Conclusions

Panel I: 20 Years Later - Is the Time Now for the EU Electricity Market Integration?

- The Forum welcomed the progress made by all Contracting Parties towards the full transposition of the Electricity Integration Package, most notably the adoption of laws in Serbia and North Macedonia, advancement of transposition in Ukraine, Montenegro, Moldova and Albania as well as the progress made so far by Georgia and Kosovo¹. The Forum urged the Energy Community Contracting Parties to complete the transposition of the Electricity Integration Package as soon as possible as a pre-condition to enabling the next steps of the market integration. The continuous support of the Energy Community Secretariat in the finalization of the drafts, as well as the importance of the political commitment to accelerating adoption, was recognised.
- The Forum reiterated the importance of compliant transposition of the Electricity Integration Package and its role in accelerating market integration, particularly through adherence to the EU Single Day-Ahead and Intraday Coupling (SDAC/SIDC). The Forum underlined the strategic importance of implementing the Electricity Integration Package for advancing the EU accession process, the energy transition and establishing reciprocity as regards the rights and obligations of EnC and EU TSOs.
- The DG ENEST representative informed the Forum about the Growth Plan and the on-going acceleration of the EU accession process, with energy transition and climate policy being key policy priorities. Market integration was highlighted as crucial for accelerating decarbonization and ensuring energy security in the Energy Community. It figured prominently in both accession process and the Reform Agendas agreed upon with five Western Balkans Contracting Parties, as

¹ This designation is without prejudice to positions on status and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

well as Ukraine and Moldova. The European Commission will continue to provide substantial financial resources to support the related investments.

- The European Commission informed the Forum that the transposition of the Electricity Integration Package will be followed by a verification of compliance to ensure proper implementation. Given that compliant transposition will enable Contracting Parties to access EU market integration platforms and accelerate accession, the role of the European Commission in issuing a formal opinion on the verification was emphasized. The Forum invited the European Commission and the Energy Community Secretariat to provide information on the process and timeline for the verification of compliant transposition.
- The Forum expressed concern that the verification process could delay the operationalisation of market coupling and postpone the planned go-live, currently envisaged for Q4 2026 to Q1 2027, for at least a year. It urged for the parallelization of legal and technical processes to avoid delays and accelerate market coupling, where possible and practicable.

Panel II: CBAM, Carbon Pricing, and Electricity Sector: Charting the Path Ahead

- The Forum took note of the application of the Carbon Border Adjustment Mechanism (CBAM) to electricity imports into the EU from the Contracting Parties as of 1 January 2026, at full cost, with no immediate exemptions foreseen. The Forum underlined that – as assumed by the CBAM Regulation – there is currently no technical solution available to enable market coupling and the enforcement of CBAM in parallel and called upon the European Commission to urgently seek constructive solutions, before 1 January 2026, to address the concerns raised by all stakeholders regarding the implications of CBAM on the electricity sector.
- The Forum emphasised that the implementation of CBAM on the one hand, and the implementation of SDAC/SIDC and balancing platforms for EnC contracting parties on the other, are mutually incompatible.
- The Forum highlighted that while stakeholders, including electricity traders, transmission system operators (TSOs), renewable energy investors, and other market participants, are preparing for the definitive CBAM period, they are confronted with significant technical and regulatory uncertainties. These include the differentiation between transit and imports, the treatment of technical flows and how to account for them under CBAM, the application of default values, and the potential role of power purchase agreements (PPAs) and guarantees of origin.

- The Forum recalled the crucial role of renewable energy in the clean transition of the Contracting Parties' economies and in meeting their 2030 targets. It emphasized that CBAM should acknowledge the importance of preserving and further incentivising investments in the renewable energy sector.
- The Forum welcomed the planned political discussions on carbon pricing within the framework of the Energy Community informal Ministerial Council and invited ministers to send a clear signal to the European Union by committing to the introduction of carbon pricing.

Panel III: Affordability and Active Customers' Participation in the Electricity Market

- The Forum acknowledged that the active participation of consumers in the energy market enhances decarbonization and competitiveness, ultimately contributing to affordable energy supplies overall market efficiency. Recognizing that interventions in price setting may hinder active participation of consumers in the market, the Forum urged Contracting Parties to prioritize the phase-out of the end-user price regulation, in line with the Electricity Directive. The Forum emphasized that the protection of vulnerable and energy-poor citizens should be ensured in a targeted and efficient manner and invited Contracting Parties to further develop long-term measures that address energy poverty in a more sustainable way.
- The Forum called on regulatory authorities to further improve, in close cooperation with system operators and market participants, the regulatory frameworks that incentivize the active participation of consumers in the electricity market.
- The Forum invited the ECRB to explore the main obstacles to consumers' active participation in the electricity market and to provide recommendations for actions to be implemented to unlock customer's potential in the electricity market, including through demand response and provision of other flexibility services.

Setting the Scene: Energy Regulators Facilitating Energy Transition and Market Integration

- The Forum highlighted the key regulatory tasks in the energy transition and market integration, focusing on regulatory activities, challenges, and needs arising from the implementation of the Electricity Integration Package, REMIT, and other key elements of the Energy Community acquis. The Forum also discussed how regulators should approach these challenging tasks, highlighting lessons learned and best practices for establishing independent, transparent, and predictable energy regulatory frameworks.

- The Forum addressed the large scale and complexity of upcoming regulatory tasks, Energy Community NRAs and the ECRB need to strengthen their regulatory independence and capabilities, both in terms of institutional and personnel capacities.
- Energy regulators of the Energy Community informed the Forum of their ongoing commitment to cooperation through the ECRB, and with stakeholders in their energy sector and international partners, specifically the European Commission, ACER, EU NRAs, and fellow regulatory associations such as CEER, MedReg, and ERRA, to enable implementation of best regulatory practices and development of targeted capacity building activities.

Panel IV: TSO Cooperation – For More Efficient Market and More Secure System

- The Forum acknowledged the proposal provided by all TSOs regarding the Capacity Calculation Region (CCR) determination as a significant and valuable step forward and underlined the need for finally adopted CCR resolution to ensure an efficient application of coordinated capacity calculation and regional operational security coordination, as well as outage coordination.
- The Forum acknowledged that the CCR determination, as well as the necessary agreements and the establishment of Regional Coordination Centers (RCCs), serve as a foundation for the operationalisation of appropriate SORs.
- The Forum took note of the periodic appearance of critical regimes with excessive flows through the WB6 systems, multiple times higher than the allocated capacities. The Forum called for the composite regional capacity calculation beyond boundaries of the actual CCRs, as a temporary measure even before the operationalisation of new CCRs, in order to prevent excessive flows and ensure operational security.
- The Forum recalled the 70% requirement of the TSOs and its implementation deadline of 1 January 2028. In a cooperation with TSOs, Energy Community NRAs should start monitoring progress towards the 70% compliance.
- The Forum recognised the role of TSOs procedures for calculating Net Transfer Capacities (NTCs), which could be considered as a solid basis for the initial application of market coupling, including bilateral coordination in the first place, as well as multilateral coordination where

needed to ensure that the applied NTC values are simultaneously feasible and do not lead to network security issues.

- The Forum acknowledged the need to accelerate activities on transposing the Electricity Balancing Guideline and to establish the necessary preconditions for joining EU Balancing platforms.

Panel V: Market Coupling and Competitiveness

- The Forum welcomed the active cooperation of NEMOs in drafting the MCO Integration Plan (MCO IP) and accelerating its submission to ACER for approval. The Forum was informed that ACER considers the submitted MCO IP to be incomplete and therefore requested NEMOs to amend and improve the MCO IP proposal in order to make it compliant with the legal requirements. The Forum was also informed that NEMOs are currently working on completing the MCO IP and will subsequently resubmit the proposal to ACER for approval. The Forum recognised that the possibility of providing technical assistance to accelerate the finalisation of the MCO IP will be explored, should it be required by NEMOs.
- The Forum acknowledged that the approval of the MCO IP, together with its transposition, is key to unblocking the adherence of Energy Community TSOs and NEMOs into SDAC/SIDC contractual framework.
- The Forum recalled that minimum period of 18 month is needed to ensure operational and contractual readiness for go-live in Market Coupling, based on fixed annual windows, i.e. SDAC in Q1 and SIDC in Q4 (following a successful SDAC go-live for the relevant border/bidding zone), within the timeframes defined by the draft MCO IP.
- The Forum called for the parallelization of operational activities, while acknowledging that Market Coupling go-live activities (see point 3) can only start within SDAC/SIDC governance structure after the entry into force of the MCO IP (including NEMO designation) and the formal acknowledgement of full legal transposition by the Energy Community Secretariat and the European Commission.

- The Forum, in view of the upcoming electricity market integration, invited Energy Community Secretariat to propose a framework that ensures full harmonization of VAT regimes and abolishes other undue administrative requirements.
- The Forum addressed the strong price correlations among Western Balkan Energy Community Contracting Parties and neighbouring EU markets, highlighting both the potential for integration and the need for coordinated action to mitigate risks posed by the recent significant price spreads between the Southeast European (SEE) region and Western Europe. Closing the gap will require investment in flexibility and storage, enhanced cross-border infrastructure, full market coupling, regulatory stability and deeper regional cooperation.
- The Forum recalled that the Energy Community will become part of the pan-European welfare optimization and that the optimal use of cross-zonal capacities is crucial for ensuring these benefits for the whole of Europe.

Panel VI: DSOs at the Crossroads: Enablers or Bottlenecks in the Energy Transition

- To achieve the objectives of decarbonisation by 2030 and to establish the necessary conditions for the gradual phase-out of coal-fired thermal power plants, a substantial integration of renewable energy sources into transmission and distribution networks will be required. This transition will demand significant investment in developing and modernising network infrastructure, particularly at the distribution level. Given that existing distribution tariffs are insufficient to meet these financial requirements, they will need to be revised to reflect the actual investment needs and align with the overarching goals of decarbonisation.
- The regulator's role should be enhanced in the context of implementing the Electricity Integration Package to ensure that relevant DSO tariff designs and levels support new DSO responsibilities. Wholesale market development should send pricing signals to end users to incentivise self-consumption schemes, provided there is a relevant regulatory framework. Investment policy, as supported by DSO tariffs, should aim to ensure sufficient capacity reserves in the network to allow the rollout of renewable energy sources. Incentives, including regulatory ones, should be in place for the deployment of new technologies such as distributed generation and energy storage.

- International financial institutions are available to support DSOs in financing the renewal, expansion, and modernisation of distribution networks. Strengthening corporate governance, ensuring the timely preparation of well-structured regulatory-approved projects, and making corresponding investment decisions are essential for making distribution grid fit for net-zero emissions. To enable the achievement of medium- and long-term energy and climate goals, excessive procedures related to project preparation and implementation, depending on the project specifics, should be optimised and made more efficient.
- Distribution System Operators are encouraged to conduct a comprehensive analysis and clearly outline their investment requirements in ten-year distribution network development plans, which should be revised every two years. Regulatory bodies should rigorously evaluate these plans and, upon approval, adjust distribution tariffs to facilitate the implementation of all investments that are justified from both a technical and economic perspective.
- Digitising and streamlining the process for approving connections to the distribution network is essential for integrating more distributed energy sources and reducing the time required for their connection. Drawing on European practices, DSOs should act swiftly to undertake the necessary measures and create the conditions needed to accelerate the connection of a substantial number of distributed energy sources, including self-consumers and energy communities.
- This Forum invited European institutions to bring together DSOs from EU Member States, such as the EU DSO Entity and E.DSO, to include DSOs from Energy Community Contracting Parties in their activities. Such inclusion would facilitate the mutual exchange of experiences related to the energy transition and the sharing of best practices, particularly in the integration of distributed energy sources.
- In line with the requirements of the Electricity Directive, existing net metering schemes, where electricity fed into and consumed from the grid is not accounted for separately, should be discontinued after 31 December 2026. Best practices across the EU should be reviewed to identify the most appropriate approach for phasing out such schemes, particularly in cases where rights were granted prior to the deadline, and to support a transition towards a net billing mechanism.