General updates in the Energy Community

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3rd Package implementation overall

- 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
**Implementation in focus – Western Balkan CPs**

**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
Network codes - catching up

1. **First network codes** \( \text{IO, CMP} \) adopted in January 2018
   - Transposition and implementation deadline 1 October 2018

2. **Second set** \( \text{CAM, TAR} \) scheduled for adoption in November 2018
   - Transposition + [9] months from adoption
   - Implementation + [15] months from adoption

3. **Last remaining network code** \( \text{BAL} \)
   - Negotiations on adaptations to start end 2018/early 2019
   - Implementation deadline?
Licensing

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
New acquis and cooperation patterns

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?
Thank you for your attention!

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