



COMMUNICATION POLICIES OF NATIONAL ENERGY REGULATORS IN THE ENERGY COMMUNITY

Assessment and Recommendations

December 2017



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I. INTRODUCTION

1. About ECRB

The Energy Community Regulatory Board (ECRB) operates based on the Treaty establishing the Energy Community (hereinafter 'the Treaty'). As an institution of the Energy Community¹ ECRB advises the Energy Community Ministerial Council and Permanent High Level Group on details of statutory, technical and regulatory rules and makes recommendations in the case of cross-border disputes between regulators.

ECRB is the independent regional voice of energy regulators in the Energy Community. ECRB's mission builds on three pillars: providing coordinated regulatory positions to energy policy debates, harmonizing regulatory rules across borders and sharing regulatory knowledge and experience.

2. Background

In 2014 ECRB prepared the document "Raising Consumer Awareness - Regulatory Tools Supporting Retail Market Opening" and promotional leaflet "You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!" (Customer Brochure)² targeted for use by national regulatory authorities (hereinafter 'regulators' or NRAs) to inform customers on their rights in context of the process of full market liberalization that was aimed to start from 1st of January 2015.

Since a strategic approach in public communications is one of the key prerequisites of a modern organization in reaching its goals, ECRB decided to assess NRAs' experiences made, level of usage and the effects of this specific leaflet as well as wider NRA's approaches in communication policies. The assessment paper should provide further guidance and recommendations for improvement of NRAs' communication policies and customer relations, as well as help ECRB to prepare similar communication tools in future.

3. Scope of the report

The present report assesses the level of usage of the promotional leaflet "You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!", its effects and experiences gained by NRAs, as well as wider NRAs' approaches in communication policies, including types of formal or non-formal procedures and guidelines, human resources, NRAs' web sites as a key communication resource, communication costs, media events and relations, press clipping, public surveys, communication channels, media campaigns and potentials for improvement of communication policies.

¹www.energy-community.org

² www.energy-community.org – documents – ECRB documents, 2014

The report covers Albania, Bosnia and Herzegovina, Georgia, Italy, fYR of Macedonia, Moldova, Montenegro, Kosovo*³, Serbia and Ukraine.

The analysis is performed separately for the usage of the promotional leaflet and wider NRAs' approaches in communication policies, while the summary, conclusions and recommendations refer to both topics.

4. Methodology

Assessment contained in the present report is based on the information provided by the regulatory authorities of the Energy Community Contracting Parties and Italy.

Data collection was done through a questionnaire containing two sets of questions aimed to identify the level of usage of the promotional leaflet "You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!", its effects and experiences gained by NRAs, as well as wider NRA's approaches in communication policies.

³Throughout this document the symbol * refers to the following statement: This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Advisory Opinion on the Kosovo declaration of independence.

II. ASSESSMENT

1. Promotional Leaflet “You are the one who decides!”

In 2014 ECRB prepared a promotional leaflet “You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!” targeted for use by NRAs to inform customers on their rights in context of the process of full market liberalization that was aimed to start from 1st of January 2015.

The first part of the assessment provides an overview of the level of usage of this promotional leaflet, its effects and experiences gained by NRAs, with focus on the communication channels/means used for promotion, duration period, impact of the promotion and NRAs view on successfulness of this promotion activity.

This part of the analysis is concluded with an overview of the key reasons of those NRAs which did not use this communication tool.

1.1. Who and How Used the Promotional Leaflet?

The promotional leaflet “You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!” aimed to promote market opening was used as communication tool by the NRAs from Albania, Bosnia and Herzegovina, Kosovo* and Montenegro.

On the other side, NRAs from Georgia, Italy, fYR of Macedonia, Moldova, Serbia and Ukraine did not use this communication tool.

Key communication channels for promotion of the leaflet were NRAs websites. Additionally, in Bosnia and Herzegovina and Montenegro there was promotion through advertisements in printed media and in Bosnia and Herzegovina there was also promotion through online media (news sites) as well as through a public event.

In Bosnia and Herzegovina, the leaflet was adjusted to local circumstances and used by the two entities regulators as well (the Regulatory Commission for Energy in Federation of Bosnia and Herzegovina – FERK, and the Regulatory Commission for Energy of Republika Srpska – RERS) through the same communication channels. The Delegation of the European Union in Bosnia and Herzegovina welcomed “the ongoing public campaign carried out by the State Electricity Regulatory Commission (SERC) and Entity regulators on upcoming full electricity market opening.”⁴

In Bosnia and Herzegovina, the public campaign lasted for a couple of months, and afterwards the leaflet remained published on the regulators websites. The leaflet is still published on the NRAs websites in Albania and Kosovo*, while in Montenegro it remained published for two years.

⁴ Quote from the press release, Sarajevo, 28 November 2014.

None of the NRAs which used the leaflet assessed the impact of its promotion.

The NRAs were asked to rate this promotion activity in the range from 1 to 5 (1: Not successful, 2: Very low success, 3: Relatively successful, 4: Successful; 5: Very successful) and the results show that the average rating is 3 – relatively successful.

It should be noted that a limiting factor for success of the promotional leaflet was very early stage of electricity and gas retail markets development at the end of 2014, giving limited possibilities for household customers to choose an alternative supplier particularly.

1.2. Reasons for Not Using the Promotional Leaflet

The key reason for the NRAs from Georgia, FYR of Macedonia, Moldova and Ukraine not to use the promotional leaflet was the fact that the market opening for households and small customers was postponed, i.e. it did not occur as foreseen on 1st of January 2015.

On the other side the Serbian NRA's reasons for not using the leaflet was that their website has been under reconstruction for a lengthy period, and on the other hand this promotional activity was not recognized as urgent, since customers were already familiar about their rights in the open market through related notice on their bills.

Finally, the Italian NRA was not interested in promoting the leaflet since tailor made communication in Italian language is needed.⁵

2. NRAs' Communication Policies

The second part of the analysis assesses wider NRAs' approaches in managing general communication policies.

Starting point is to assess NRAs' formal and non-formal procedures and guidelines for communication with the public.

The following segment assesses who and how conducts public relations (PR) and media relations, including presence of specialized personnel for PR and media relations, knowledge and skills gained through media trainings, the average response time to media enquiries, as well press clipping practices.

NRAs' web sites as a key communication resource were examined as regards the frequency of updates, information that is usually published, availability of a customer corner as well the option for visitors to leave feedback on the web content.

The analysis also includes an assessment of the communication costs in NRA budgets, media events organized/attended by the NRAs, public surveys as one of the key communication tools, communication channels, i.e. new media and traditional media,

⁵ Note: the promotional leaflet was developed tailor made for NRAs from the Energy Community Contracting Parties.

conducting media campaigns, as well as NRAs' needs for improvement of communication policies.

2.1. Differences in Communication Policies

The starting point is to assess the existence of distinct categories of communication policies, including both formal, written policies and guidelines, as well non-formal communication procedures present with the examined NRAs.

2.1.1 Formal Communication Policies/Guidelines

NRAs from Albania, Georgia and Kosovo* reported that they have formal, written communication policies.

The NRAs of fYR of Macedonia reported that within the project for reform of the water sector, a recently developed Strategy for Communication and Information incorporates a strategic communication approach for energy and water services; implementation is planned for the beginning of 2018.

In Ukraine the NRA is obliged to conduct its public communication according to the provisions stemming from the several national legislations acts, including: the act on communication of state and local authority's activities through the mass media; the act on press media; the act on television and broadcast; the act on information; and the act on news agencies.

2.1.2 Non-Formal Communication Policies/Guidelines

In addition to formal communication policies there are non-formal communication procedures present as well.

In Bosnia and Herzegovina, a formally adopted document of the NRA is not in place at the moment. However, the Proposed Public Outreach Concept⁶ is used. It serves as guideline for all relevant stakeholders to join efforts in creating a harmonized public outreach plan aimed to explain these complex energy sector topics in a simple and comprehensible way to all interested parties. There are ongoing activities on preparation and approval of the Communication Plans in all three regulatory Commissions operating in Bosnia and Herzegovina in State- (SERC) and entity-level (FERK and RERS).

The Georgian NRA reported that beside formal procedures, there are also non-formal communication procedures in place, while the Italian NRA works according to non-formal communication procedures which are mainly based on previous experience in this scope of work.

The NRA of fYR of Macedonia reported that there are non-formal procedures, especially in the segment of media relations, aimed to have timely and accurately responses to media

⁶ Prepared by [USAID-EIA](#) for the regulators of Bosnia and Herzegovina in September 2016.

enquiries. The president of the NRA, depending on the, assigns the specific task to member(s) of the expert's staff to prepare the requested information which afterwards is subject to approval by the Commissioners and then sent to journalist via official NRA email address. The President and the Deputy President are also entitled to give official statements, interviews or attend TV debates.

In Moldova there is a lack of special approved rules for communication within the NRA, although there is a special person hired for communication with media which is responsible for drafting press-releases, publishing information on the website etc.

The NRA of Montenegro reported that there are non-formal procedures which are based on their experience, aimed at timely and accurately responses to media enquiries and all other interested parties. The members of the Board or the Executive Director assign tasks to staff member(s) to prepare adequate answers, which are then subject of approval before being sent to the interested party. The Board members and Executive Director are entitled to give official statements and interviews in media. Additionally, the Montenegrin NRA has a designated person for preparing press clippings, keeping track of all sent and received documentation and e-mails as well publishing information on the website.

In Serbia the decision on who will communicate with the media is with the NRA's Council as well as the content of the information that is communicated. Also, there is an obligation for the staff member in charge of public relations and all other employees to forward any media request to the NRA's Council for further consideration.

2.2 Who and How Conducts PR and Media Relations?

The following chapters aim to detect how NRAs deal with PR and media relations, i.e. whether specialized person(s) are responsible for PR and media relations or whether the topic is covered by one of the board members or other employees, have those persons being trained for this type of activities, which is the average time for response to media enquiries and which are the press clipping practices.

2.2.1 Human Resources

NRAs from Albania, Georgia, Italy, Kosovo*, Moldova, Serbia and Ukraine have specialized staff for PR and media relations.

With the State level NRA of Bosnia and Herzegovina there is no dedicated person in charge for PR and media most of the related tasks are done by the Chair and Commission members, as well as by the Advisor to the Commission. The two entities' regulators have designated PR person.

With the NRA of FYR of Macedonia NRA no specific person is responsible solely for PR and media. Usually the NRA President, depending on the topic of interest by the media, tasks a member(s) of the expert's staff to prepare the requested information and/or communicate with

a journalist, while written communication is done via official NRA email. The President and the Deputy President are entitled to give official statements, interviews or attend TV debates.

With the Montenegrin NRA Board members or the Executive Director assign the task of preparing requested information to staff member(s), which is then sent to them for approval. Written communication with the interested party/media outlet is performed via the official NRA email and the Board members and Executive Director are entitled to give official statements and interviews.

2.2.2 Media Trainings

NRA staff and Board members from Bosnia and Herzegovina, Georgia, Kosovo* and Serbia in charge for direct communication with media have attended specialized media trainings including *inter alia* speaking in front of camera and giving TV interviews.

NRA representatives from Albania, Italy, fYR of Macedonia, Moldova, Montenegro and Ukraine did not attend specialized media related trainings.

2.2.3 Responsiveness to Media Enquires

In general, the average time for response to media enquires varies from within-day response to several days after, and obviously also depends on the complexity of the topic of interest.

The NRAs from Georgia, Italy, Kosovo* and fYR of Macedonia typically provide answers still on the day of request.

In Kosovo*, in some cases responses also depend on the time when media questions or enquiries are received by the NRA, meaning that if they arrive late in the afternoon there might not be enough time to provide answers the same day.

The NRA of fYR of Macedonia additionally explained that in cases when questions are complex and take more time to prepare journalist will be informed about the expected availability of answers and answers are usually provided on the next day.

NRAs from Bosnia and Herzegovina and Ukraine are usually providing answers on the next day, while the Albanian, Montenegrin and Serbian NRAs' response-time ranges from the next day to several days after the media enquire was received.

The NRA of Moldova informed that the response-time depends on the complexity of the enquire and that in some cases the response can be provided on the same day, while in other cases the Commission follows the terms prescribed in the Law on Petitioning that foresees a maximum 30 days for replies.

2.2.4 Press Clipping

There are differences among the NRAs regarding practices on press clipping, i.e. keeping record of the media articles related to their activities.

NRAs from Bosnia and Herzegovina, Georgia, Italy, Kosovo*, Montenegro, Serbia and Ukraine are using press clippings to keep record of their media exposure. The State level regulator of Bosnia and Herzegovina uses the services of some agencies whose operation includes press clipping related to energy sector.

The NRA of FYR of Macedonia has no regular practice of press clipping in place, i.e. it is conducted occasionally in the cases of significant media coverage of a NRA media related event.

The NRAs of Albania and Moldova have no practice of press clipping in their institutions.

2.3 NRAs' Websites

The assessment of NRAs' websites aims to detect how frequently those are updated, the types of information that is usually published, whether a customer corner is available on the website, as well whether there is an option for visitors to leave feedback on their satisfaction with content.

2.3.1 Frequency of Website Updates

The assessment shows that the frequency of updates ranges from several times per day up to weekly updates, depending on the activities and types of information which are published on the website. Some specific parts of the web content are updated several times per year.

NRAs of Italy and Ukraine are updating their websites daily, while in Bosnia and Herzegovina daily updates are depending on the activities and take place when needed.

Other NRAs reported that updates are performed when needed, from every day up to three times per week as in the case of Georgia, very often as stated by the NRA of Kosovo*, several times per week in the case of FYR of Macedonia, at least once per week in Moldova, while the Montenegrin NRA reported that there is a frequent website update which depends on the scope of their activities.

The Serbian NRA reported that some information, such as their Information Booklet is updated within 15 days after some major changes occur and this policy is in accordance with the Law on Free Access to Information of Public Importance. On the other hand, the register of issued and revoked licenses is updated once per week, while all acts adopted by the NRA, such as methodologies, price approvals, codes approvals etc., are published on the website after their publication in the Official Gazette. The rest of the web content is updated several times per year.

2.3.2 Website Content

The following segment of the assessment refers to information that is usually published on the websites.

The type of published information ranges from the legal framework, including laws, rules, codes, methodologies, to various decisions, resolutions, regulated tariffs, registers of the licensed energy companies, annual reports, draft decisions which are subject to public consultations, as well as press releases and news related with the activities of the NRA or other energy related issues.

The Albanian NRA reported that the usual published web content includes the legal framework, NRA decisions, draft rules for consulting, notification for Board of Commissioners meetings etc.

In Bosnia and Herzegovina, the national regulator's website includes short information on the options offered in the open electricity market. It contains other information relevant to the electricity sector that additionally clarifies this matter, including the Basic Power Indicators and Register of Electricity Traders. The NRA publishes information on its activities including the announcement of its regular sessions and proceedings on new rules, tariffs and licensing. The website includes the current legislative framework (national and entity level, Energy Community *acquis*), as well as annual reports, i.e. Activity Reports and Independent Auditor's Reports.

In Georgia the usual web content includes resolutions, press-releases and public hearing agendas, while in Italy the published information includes various provisions and other documents.

The NRA of Kosovo* reported that the web content is consisted of laws, rules, acts, decisions, reports, consumer information, consultation reports, agenda of the Board meetings etc.

In FYR of Macedonia the NRA's website includes information on primary and secondary legislation, a variety of decisions on regulated prices and tariffs, requests for licenses, issued and revoked licenses, frequent Q&A's, annual reports, news, press releases etc.

The Moldovan NRA's website content consists of news, announcements about public discussions and hearings, new decisions of the Commission and other information.

In Montenegro the NRA's website includes information on decisions on prices, decisions on licenses, rules and methodologies and news regarding energy sector.

In Serbia the website consists of all decisions for which the law prescribes obligation for publication and in addition the most important news related to the work of the NRA.

The Ukrainian NRA's website includes press-releases, all decisions of the NRA, draft decisions for public consultations, other materials which must be published according to the legislation, and other documents and explanatory information.

2.3.3 Customer Corner

The presence of customer corner on NRAs website is available in most of the examined cases.

The websites of the NRAs of Albania, Georgia, Italy, Kosovo*, Moldova, Montenegro and Ukraine include a customer corner where customers will usually find specific information of their interest.

The NRA of Bosnia and Herzegovina reported that there are ongoing activities for preparation of Communication Plans, which includes development of a customer corner on the website.

The website of the NRA of fYR of Macedonia includes a section with frequent Q&As aimed for the customers and mainly relating to issues of district heating, although with the new Strategy for Communication and Information it is envisaged to redesign the website and develop a customer corner which will include various information on customers rights and obligations in the energy markets, switching procedures etc.

On the website of the Serbian NRA in the sections “Licenses, Price regulation and Electricity markets” there is specific content of Q&As aimed for information of customers.

2.3.4 Customers Feedback

As a final consideration in this section it is checked whether there is an option for website visitors to leave feedback on the satisfaction with the content.

None of the observed NRAs provide such option on their website.

However, in some cases there is a possibility for two-way communication through social media channels (Facebook, Twitter, YouTube), as elaborated in the section 2.5.1.

2.4 Communication Costs, Media Events and Public Surveys

The indicators hereinafter used to assess NRAs communication policies are: presence of specified communication costs in the budget, types of media related events that NRAs organize or attend as well as practice of conducting public surveys.

2.4.1 Communication Costs

The results of the assessment show that there are two groups of NRAs regarding allocation of communication related costs in their financial plans.

The first group is the one which reported allocation of such communication costs – this includes NRAs from Albania, Bosnia and Herzegovina, Georgia, Italy, fYR of Macedonia and Serbia.

On the other side, NRAs from Kosovo*, Moldova, Montenegro and Ukraine reported that in their budgets there is no specific line for communication costs.

2.4.2 Media Events

Regarding the practice of organizing or attending media related events, the results show that in most of the cases NRAs are proactive in this respect.

Media briefings (off record or on record) are practiced by the NRAs of Albania, Georgia, Italy, fYR of Macedonia, Moldova, Montenegro and Ukraine.

In the case of organizing or attending press conferences, the results are similar and reported as regular activity of the NRAs of Georgia, Italy, Kosovo*, fYR of Macedonia, Moldova, Serbia and Ukraine.

Additionally, organizing or attending other types of public events and conferences is practiced by the NRAs of Albania, Bosnia and Herzegovina, Georgia, Italy, Kosovo*, fYR of Macedonia, Moldova, Serbia and Ukraine.

TV interviews and debates are practiced by NRA representatives from Bosnia and Herzegovina, Georgia, Italy, Kosovo*, fYR of Macedonia, Montenegro, Serbia and Ukraine.

On the other hand, results show that organizing specialized trainings for journalists as part of the communication activities is only practised by the NRAs from Bosnia and Herzegovina, Georgia and Italy.

2.4.3 Public Surveys

Conducting public surveys on relevant issues for NRAs' activities is one of the key tools which enables performing comprehensive communication policies.

The assessment shows that public surveys are part of the communication activities of the regulators of Georgia, Italy and Serbia.

The NRA of Bosnia and Herzegovina reported that there is awareness of the necessity for this tool and that the related findings from the survey organized by USAID-EIA Project in Bosnia and Herzegovina have been used in their communication related activities.

The Moldovan NRA has not established a regular practice of using public surveys in their work, although had experience with conducting one public survey in 2012.

On the other hand, NRAs from Albania, Kosovo*, fYR of Macedonia, Montenegro and Ukraine reported that until now this tool has not been used.

2.5 Communication Channels

The following segment of the assessment paper examines what types of communication channels are most frequently used by the NRAs in disseminating their information to the targeted audiences. For the purposes of this analysis the communication channels are divided in two groups. First are internet based communication channels, including NRAs' websites, social media and online advertisements. The second group is composed of traditional media, including TV advertisement, radio advertisement, newspaper advertisement as well printed materials such as brochures, leaflets etc.

2.5.1 Internet based Communication Channels

Results show that the website is the main communication channel used by all of the examined NRAs, namely Albania, Bosnia and Herzegovina, Georgia, Italy, Kosovo*, FYR of Macedonia, Moldova, Montenegro, Serbia and Ukraine.

Social media are used only by some of the NRAs and only few of them reported that the two-way communication is practiced.

The Georgian NRA has official accounts on Facebook and Twitter, the Italian regulator uses Twitter and YouTube for wider dissemination of key messages and information and the Moldovan NRA uses Facebook as communication channel.

The NRA of Kosovo* uses Facebook for a two-way communication with public; the same is the case for the Ukrainian NRA that has accounts on Facebook and Twitter allowing two-way communication with their targeted audiences.

Practice of using Online Advertisement is being part of communication activities of the NRAs of Bosnia and Herzegovina, Georgia, Italy, FYR of Macedonia and Ukraine.

2.5.2 Traditional Media

TV advertisements are used by the Georgian, Italian and Montenegrin NRAs. In the case of Italy, TV campaigns are funded through a government program.

Radio advertisements are used only by the regulators from Georgia and Italy. The Georgian NRA has a partnership with one radio station where the NRA hosts a radio-program called "Professionals" on a bi-monthly basis. The program is hosted by a Georgian NRA employee and various energy-related issues are discussed, including issues relevant to retail customers.

Newspaper advertisements are part of the communication channels used by the NRAs of Albania, Bosnia and Herzegovina, Georgia, Italy, Kosovo*, Montenegro and Ukraine.

Brochures, leaflets, other printed material are communication channels used by the NRAs of Bosnia and Herzegovina, Georgia, Italy, Montenegro, Serbia and Ukraine.

2.6 Customer Phone Line

Additionally, it was examined whether there is a practice for using a special phone line for communication with customers.

NRAs of Albania, Georgia (toll-free number), Moldova (toll-free number) and Ukraine use special phone line for communication with customers.

The Italian regulator reported that there is one special customer phone line, which currently is only available for the energy sector, the so called “green number 800166654”.

The NRA of Kosovo* reported that the customers can call an official NRA phone number and afterwards the calls are transferred to the customer care office.

The NRA of FYR of Macedonia has an official phone line for all purposes and calls from customers are being redirected by the office secretary to the experts which can provide answers relevant for the topic of interest. Additionally, direct phone lines of the employees are published on the website.

The NRAs from Bosnia and Herzegovina, Montenegro and Serbia reported that they are not using a special customer phone line.

2.7 Media Campaigns

Introducing new regulatory practices, significant changes in the market functioning or other aspects of NRAs activities which are relevant for the wider public, usually should be supported by conducting tailor made media campaigns.

This part of the analysis assesses NRAs’ experiences in conducting media campaigns.

NRAs of Bosnia and Herzegovina, Georgia, Italy and FYR of Macedonia have conducted related campaigns for informing customers on relevant issues in the energy sector.

The NRA of Bosnia and Herzegovina informed that an example was accompanying the usage of the promotional leaflet “You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!” for promotion of the electricity market opening in the country.

The Italian regulator has conducted a media campaign for informing the customers on the electricity tariff reform for households. The following link was used in this campaign:
<https://www.youtube.com/user/autoritaenergia/>



The NRA of fYR of Macedonia reported that an online campaign for promotion of the web calculator was conducted in the period November/December 2013.



The campaign aimed at introducing the web based tariff calculator to the consumers in the region of Skopje, through which they could compare their average heating costs if they use electricity or are connected to the district heating system and accordingly make most appropriate choice of their heating source.

The campaign was conducted through placing web banners on popular news web sites within a period of one month. Additionally, the campaign included press release, news articles, as well interviews of the NRA's President in a daily newspaper and on a national TV station.

NRAs from Albania, Kosovo*, Moldova, Montenegro, Serbia and Ukraine, on the other hand, reported that until now they did not have any experience in conducting media campaigns.

2.8 How to improve communication policies?

The final segment of the assessment paper detects areas for which NRAs reported see a need for improving their communication policies and their practical implementation. NRAs from Bosnia and Herzegovina, Kosovo*, FYR of Macedonia, Moldova, Montenegro, Serbia and Ukraine noted that the identification of obstacles is a starting point for improvement of their communication policies.

Introducing and/or improving communication strategies and procedures is the next key area which needs to be addressed by the NRAs of Albania, Bosnia and Herzegovina, Kosovo*, FYR of Macedonia, Moldova, Montenegro and Serbia.

Designation and training of specialized PR personnel is also very important for the regulators of Bosnia and Herzegovina, FYR of Macedonia, Moldova, Montenegro, Serbia and Ukraine.

Finally, planning and increasing financial means aimed for conducting communication policies is very relevant for the NRAs of Albania, Bosnia and Herzegovina, Georgia, Kosovo*, FYR of Macedonia, Montenegro and Ukraine.

Additional comments that were provided by the NRAs include the following: for the NRA of Bosnia and Herzegovina current priority in this context is to finalize the Communication Plan and to proceed with its implementation. The Italian regulator considers need to improve efficiency in conducting its communication policies, while the NRA of FYR of Macedonia NRA identified need for increased internal understanding about the importance of PR and communication for well-functioning of the institution which will enable efficient execution of its communication policies.

III. SUMMARY

The summary of results, both for the level of usage of the Promotional Leaflet “You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!”, as well as the wider approaches of in communication policies in Albania, Bosnia and Herzegovina, Georgia, Italy, fYR of Macedonia, Moldova, Montenegro, Kosovo*, Serbia and Ukraine are characterized by the following:

Part 1 – Promotional leaflet

- The promotional leaflet was used as communication tool by the NRAs of Albania, Bosnia and Herzegovina, Kosovo* and Montenegro.
- The key communication channels for promotion of the leaflet were NRAs’ websites as well as newspapers and online media advertisements in a few cases.
- The public campaign lasted for couple of months and the leaflet remained published on the NRAs’ websites afterwards.
- None of the NRAs the used the leaflet assessed the impact of its promotion through an independent survey.
- Average NRA rating of this promotion activity shows that it is relatively successful.
- NRAs of Georgia, Italy, fYR of Macedonia, Moldova, Serbia and Ukraine did not use this communication tool.
- In most of the cases the key reason not to use the promotional leaflet was the fact that the market opening for households and small customers was postponed, while in Serbia this promotional activity was not recognized as urgent since customers were already familiar with their rights in the open market through related information on their bills.
- The Italian NRA was not interested in promoting the leaflet since it was developed, and tailor made for NRAs from the Energy Community Contracting Parties.

Part 2 – Assessment of NRAs’ approaches in managing general communication policies

- There are both formal, written policies and guidelines, as well non-formal communication procedures present among the examined NRAs.
- NRAs of Albania, Georgia and Kosovo* have formal, written communication policies, the fYR of Macedonian NRA will implement the recently developed Strategy for Communication and Information starting from 2018, while Ukrainian NRA is obliged to conduct its public communication according to the provisions from the several national legislations acts.
- There are non-formal communication procedures present as well. Currently in Bosnia and Herzegovina there is no formal document approved by NRA, although the Proposed Public Outreach Concept is being used and there are ongoing activities on preparation and

approval of the Communication Plans in all three regulatory commissions (SERC, FERK and RERS). The Georgian NRA also uses non-formal communication procedures and also the Italian NRA works according to non-formal communication procedures mainly based on previous experience. The NRAs of FYR of Macedonia and Montenegro use non-formal procedures, especially in the segment of media relations, aimed to have timely and accurately responses to media enquiries. In Moldova there is a lack of special approved rules, although there is a special person hired for communication with media. In Serbia the decision on who communicates with the media, as well as the content of the information that is communicated, is subject of approval by the NRA Council.

- Most of the NRAs (Albania, Georgia, Italy, Kosovo*, Moldova, Serbia and Ukraine) have specialized staff for PR and media relations. On the other hand, in Bosnia and Herzegovina, FYR of Macedonia and Montenegro there is no such specialised staff member for PR and media relations and most of the related tasks are designated to some of the experts or are done by the Chair and Commission members. The two entity regulators of Bosnia and Herzegovina have a designated PR person.
- NRA staff and board members from Bosnia and Herzegovina, Georgia, Kosovo* and Serbia attended specialized media trainings, including *inter alia* speaking in front of camera and TV interviews.
- The average time for response to media enquires varies from within-day replies to several days after, and mainly depends on the complexity of the topic of interest. In very rare cases, the response time is up to the maximum period set in legislation for free access to information of public interest. Some of the NRAs reported that no late reactions have been identified by media.
- NRAs from Bosnia and Herzegovina, Georgia, Italy, Kosovo*, Montenegro, Serbia and Ukraine are using press clipping to keep record of their media exposure. The NRA of FYR of Macedonia conducts press clipping occasionally in the cases of significant media coverage, while the NRAs of Albania and Moldova do not use press clipping in their institutions.
- The frequency of updates of NRAs websites ranges from several times per day to weekly, depending on the activities and types of information which are published on the websites. Some specific parts of the web content are updated several times per year.
- Web published information ranges from the legal framework, including laws, rules, codes, methodologies, to various decisions, resolutions, regulated tariffs, registers of the licensed energy companies, annual reports, draft decisions which are subject of public consultations, as well press releases and news related with the activities of the NRA or other energy related issues.
- A customer corner is part of most NRA websites while none of the NRAs offers an option on the website for visitors to leave feedback on the satisfaction with the content.
- Most of the NRAs, including Albania, Bosnia and Herzegovina, Georgia, Italy, FYR of Macedonia and Serbia, reported that communication related costs part of their financial plans.

- Regarding the practice of organizing or attending media related events, the results show that in most of the cases NRAs are proactive in this respect. This includes organizing media briefings and press conferences, organizing or attending other types of public events and conferences, as well attending TV interviews and debates.
- On the other hand, organizing specialized trainings for journalists is being part of communication activities of only the NRAs of Bosnia and Herzegovina, Georgia and Italy.
- Public surveys are part of the communication activities of the regulators from Georgia, Italy and Serbia. In Bosnia and Herzegovina findings from the survey organized by USAID-EIA Project are used in communication related activities. The Moldovan NRA only made experience with conducting one public survey in 2012.
- The website is the key communication channel used by all examined NRAs, while social media is used only by some of the NRAs and only few of them (Kosovo* and Ukraine) reported to practise two-way communication. Online advertisement is a communication channel used by most of the NRAs.
- As for the usage of traditional media, TV and radio advertisement are used by fewer of the examined NRAs (Georgia and Italy), while newspaper advertisements, brochures, leaflets as well other printed material are more widely used communication channels by the NRAs.
- A special phone line for communication with customers is used by half of the NRAs (Albania, Georgia, Moldova, Ukraine and Italy), while others are using official NRA phone lines for this purpose.
- NRAs of Bosnia and Herzegovina, Georgia, Italy and FYR of Macedonia have conducted media campaigns for informing customers on some relevant issues in the energy sector.
- NRAs identified the following key areas for improvement of their communication policies: identification of obstacles, introducing and/or improving communication strategies, plans and procedures, designation and training of specialized PR personnel, increasing efficiency, planning and increasing financial means for communication and increasing internal understanding on importance of PR and media relations for well-functioning of the institution.

IV. CONCLUSIONS AND RECOMMENDATIONS

Based on the results of the present assessment the following conclusions and recommendations are drawn:

NRAs' average rating of the usage of the promotional leaflet "You are the one who decides! Spend 5 minutes to get to know your energy consumer rights!" shows relative success, although a limiting factor was the very early stage of electricity and gas retail market development at the end of 2014, giving limited possibilities for household customers particularly. Additionally, the leaflet was not fully utilized due to the postponement of the full market opening in some of the Contracting Parties.

However, having in mind that retail market functioning is in the process of further development in the Contracting Parties, there are needs for continuous customer information and education to raise their awareness. Therefore, experience gained from this promotional activity should be guidance for ECRB to work with Contracting Parties NRAs on developing similar communication tools on issues related to the retail market functioning, switching procedures, customer protection, etc.

NRAs should identify key obstacles that are a limiting factor for effective and efficient communication towards targeted audiences, evaluate their previous experience and already developed non-formal procedures, aiming to introduce and/or improve their communication strategies, plans and procedures.

Designating and training specialized PR personnel, providing media trainings to employees from other departments to expand internal knowledge and understanding of PR and media relations importance for well-functioning of the institution, as well allocating adequate financial resources, will enable NRAs to provide effective and efficient implementation of their communication activities.

NRAs websites are one of the key communication channels and therefore the necessity for customer friendly re-design should be reconsidered, allowing feedback options, usage of simplified language and avoiding technical or overly legalistic terminology, as well regular updates, and thus enable desired messages and information to reach the widest possible audience.

Established practice of organizing or attending media related events, such as media briefings and press conferences, public events and conferences, as well attending TV interviews and debates, should continue and be strengthened in the following period, while emphasize should be placed on organizing specialized trainings for journalists.

Introducing new regulatory practices, significant changes in the market functioning or other aspects of NRAs activities which are relevant for the wider public, should be supported by conducting public surveys and tailor-made media campaigns.

NRAs websites should be used as a cornerstone in conducting cost-effective Internet campaigns through Online Advertising and two-way communication through the Social Media. Finally, special customer phone line should be put in place in the cases where it lacks.



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