



Uniting Europe's Energy, Today

# ACTIVE CUSTOMERS' PARTICIPATION IN THE ELECTRICITY MARKET

MAIN OBSTACLES AND HOW TO REMOVE THEM

31st Athens Forum

3 JUNE 2026

# CHALLENGE BUT ALSO A SOLUTION

## NRA's opinion:

### CHALLENGES TO ELECTRICITY GRIDS

- lack of flexibility to ensure RES integration
- lack of available capacity in the transmission grid
- lack of available capacity in the local/distribution grid
- local/system-wide congestions
- deterioration of voltage quality



### HOW ACTIVE CUSTOMERS CAN CONTRIBUTE TO ENERGY TRANSITION

- provide flexibility to ensure RES integration
- improve the efficiency of existing grids
- defer investment needs
- improve voltage quality
- add competitiveness in the market
- security of supply



Legend: total score based on rates assigned by NRAs in order of priority, where 1 – less important, 3 – most important

# RESOURCE IS THERE



## Renewable self-consumers/active customers in Contracting Parties

Contracting Party	Number of active customers/renewable self-consumers in 2025 (increase since 2023)	Capacity installed for active customers/renewable self-consumers in 2025, MW (increase since 2023)
ALB	3.551 (↑ 2.019)	288 (↑ 134)
BIH	154 (↑ 107)	2,70 (↑ 1.9)
GEO	2.563	323,52
KOS*	953 (↑ 664)	52,00 (↑ 42,2)
MDA	8.579 (↑ 3.524)	200,00 (↑ 84)
MNE	2.420	24,00 (↑ 10,3)
MKD	918	33,00 (↑ 19)
SRB	6.180 (↑ 3.618)	145 (↑ 85,5)
UKR	83.600 (↑ 28.642)	2.678,00 (↑ 858)

Number of active customers in MNE and MKD for 2023

## REMUNERATION SCHEME FOR ACTIVE CUSTOMERS

Net metering: ALB, BIH-RS, GEO, MDA, MNE, SRB  
 Net billing: BIH-RS, GEO, KOS\*, MDA, MNE, MKD, UKR  
 Feed-in tariffs: UKR

PROVIDE SERVICES IN THE MARKET –  
 BM: large-scale pilot (ALB); 1 case (UKR)

## Energy communities

Legally recognised in most Contracting Parties  
 Only several pilots in Serbia

## Electric vehicles and recharging points

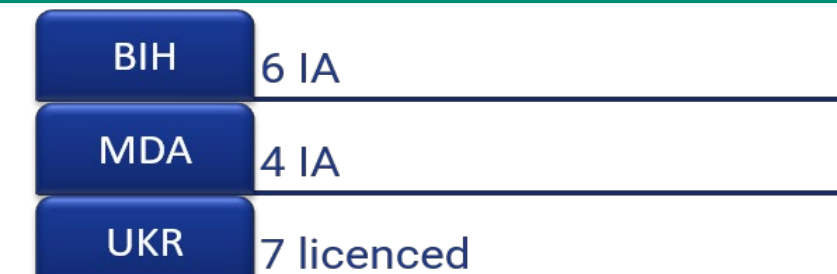
Exist and increasing

	ALB	BIH	GEO	KOS*	MDA	MNE	MKD	SRB	UKR
Number of electric vehicles	NA		7,178	6,187	9849	600	NA	NA	NA
Number of recharging points not owned by DSO	225	FBIH-30, RS 25-50	322	200	460	NA	NA	NA	NA

Estimated numbers of electric vehicles and recharging stations in the Contracting Parties

## Independent aggregators

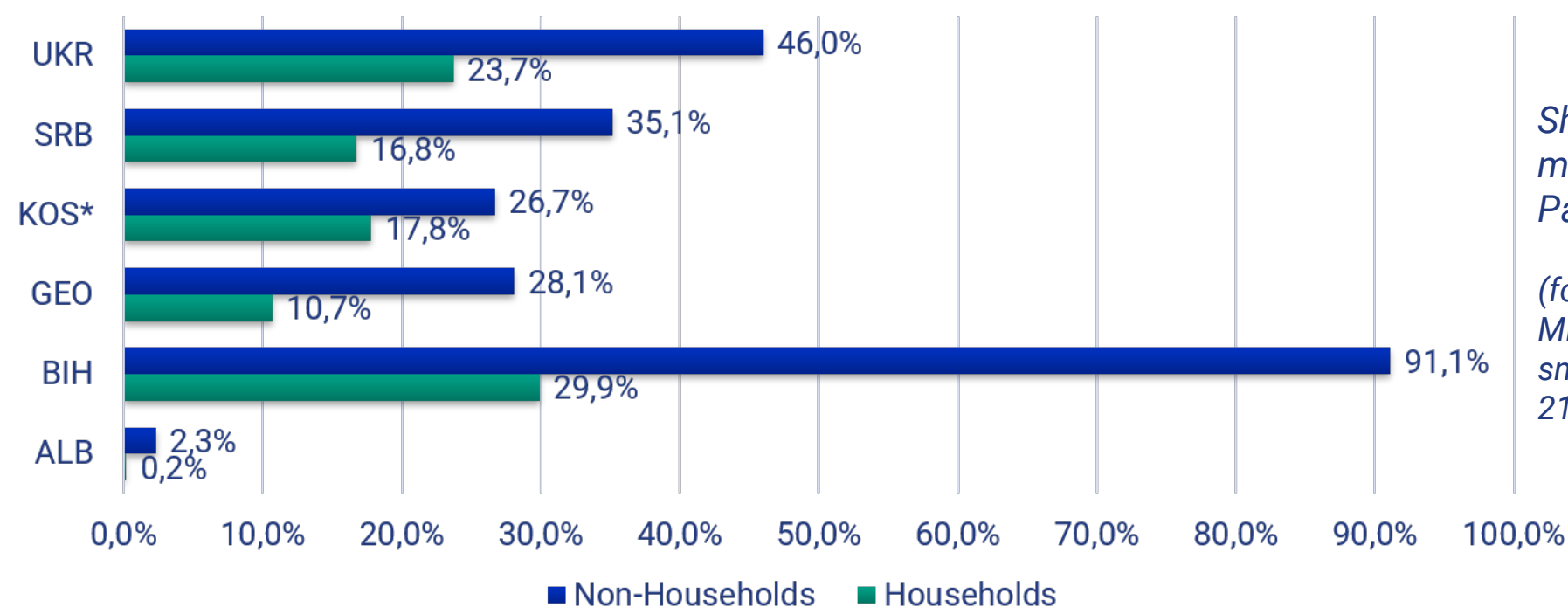
Just emerging  
 Present in 3 CPs  
 Aggregate mostly generation  
 Limited practical cases



Independent Aggregators in Contracting Parties

## Smart metering

Deployment is ongoing  
 Functionality and technical requirements vary



Share of customers with smart meters in the Contracting Parties in 2025

(for SRB data for 2024, MNE - shares of customers with smart meters are 80,8% and MKD 21,51% of all customers)

# MARKET RULES NEED TRANSFORMATION



## Key obstacles

## But progress is there

CONNECTION RULES ARE DEFINED, BUT THE PROCESS NEED MORE TRANSPARENCY AND SPEED

Flexible connections: MDA, MNE, MKD, UKR  
Shared connections: BIH (FBIH, BD), KOS\*, UKR

MARKETS ARE NOT CUSTOMISED TO THE CAPABILITIES OF DEMAND RESPONSE

Min DAM bid 100kW: GEO, KOS\*, MDA, MNE, MKD, SRB, UKR  
Active customers participate directly and/or through an aggregator: MDA, MNE, MKD, UKR

FLEXIBILITY IS MOSTLY LIMITED TO BALANCING PURPOSES

Definition of flexibility from the recast EU Electricity Regulation: MDA, UKR

FLEXIBILITY AS AN ALTERNATIVE TO GRID EXPANSION IS RARELY RECOGNISED

In TSO TYNDP: MDA, MKD;  
In DSO NDP: BIH, MNE, UKR

REGULATORY FRAMEWORK FOR DSOs TO PROCURE FLEXIBILITY SERVICES, INCLUDING CONGESTION MANAGEMENT, IS PENDING

The primary law in place: MDA, MNE, UKR  
DSO allowed to procure ancillary services: SRB

ROLES AND RULES FOR NEW ACTORS MOSTLY ARE NOT DEFINED

Compensation rules for demand response activation: ALB, SRB  
The primary law in place: MDA, MNE, SRB, UKR

NETWORK TARIFF DESIGN IN MOST CPs DOES NOT FACILITATE FLEXIBILITY IN NETWORK UTILISATION

Time-of-use network tariffs: MNE, SRB (transmission), BIH, MNE, SRB (distribution).  
Capacity-based element in D-tariffs: BIH, MNE, MKD, SRB

# CREATE ENABLERS

## The right is not enough



### ENERGY SHARING

DEFINE MARKET AND TECHNICAL RULES FOR THE ENERGY COMMUNITIES AND ENERGY SHARING



### AGGREGATION

DEFINE ROLE AND RULES FOR AGGREGATORS, INCLUDING INDEPENDENT AGGREGATORS AND THEIR RELATIONS WITH CUSTOMERS AND MARKET PARTICIPANTS



### SET RULES TO PROVIDE AND PROCURE FLEXIBILITY SERVICES

SET REGULATORY PRINCIPLES FOR FLEXIBILITY ASSESSMENTS AND NETWORK DEVELOPMENT PLANNING  
DEFINE RULES AND INCENTIVES FOR NETWORK OPERATORS TO PROCURE FLEXIBILITY SERVICES



### METERING

PROCEED WITH DEPLOYMENT OF SMART METERING  
CONSIDER ALLOWING DEDICATED MEASUREMENT DEVICES FOR DEMAND RESPONSE AND FLEXIBILITY



### DATA EXCHANGE

ESTABLISH RULES ON DATA PROTECTION, INTEROPERABILITY AND ACCESS TO DATA FOR ELIGIBLE MARKET PARTICIPANTS



### AWARENESS AND MONITORING

INFORM, TRAIN AND INVITE CUSTOMERS TO BE ACTIVE  
MONITOR MARKET EVOLUTION



### COMPETITIVE MARKET

ABANDON PRICE INTERVENTIONS ON RETAIL AND WHOLESALE MARKETS  
INCREASE TRANSPARENCY FOR CUSTOMERS



# THANK YOU!



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