EU Energy Policy  
Update
New Internal Market Reality: Network Codes & Guidelines

Concrete & binding application of 3rd Package rules => Electricity Trading and Grid Operation

From unilateral to coordinated decision-making (market coupling, TSO-coordination/RSCIs, etc.)
Market coupling

EU day ahead
Start 2014

EU intraday
Start June 2018

European Cross-Border Intraday (XBID) Solution and 10 Local Implementation Projects confirm go-live date for June 2018.
From Internal Market to Energy Union

Key issue 2009 (3. Package): Internal Energy Market

Key issue 2018 (Winter Package): Energy Union
Clean Energy ("Winter") Package => Components

- Governance
- Efficiency
- RES
- Market Design
Energy Policy Targets
Status 2014

2020
-20% GHG EMISSIONS
20% RENEWABLE ENERGY
20% ENERGY EFFICIENCY
10% INTER CONNECTION

2030
-40% GHG EMISSIONS
27% RENEWABLE ENERGY
30% ENERGY EFFICIENCY
15% INTER CONNECTION

EC Roadmap for moving to a low carbon economy in 2050

Figure 1: EU GHG emissions towards an 80% domestic reduction (100% = 1990)
Energy Policy Targets
Status 2018 – EP Position

2020
-20% GHG EMISSIONS
20% RENEWABLE ENERGY
20% ENERGY EFFICIENCY
10% INTER CONNECTION

2030
-40% GHG EMISSIONS
EP: 35% RENEWABLE ENERGY
EU&nat Ziele
EP: 35% ENERGY EFFICIENCY
nat Ziele
15% INTER CONNECTION
2. Energy Efficiency Legislation

Council: EU Target "30%"
Parl.: national binding targets => 35%


Ecodesign Working Plan 2016-2019

3. “Governance”

Core Elements of EU Governance Regulation

- National Progress Reports (2021)
- Monitoring by Commission (2021)

Simplification

- 1 Plan only
- 1 Report only
- 1 Monitoring only
4. Market Design
Disruptive change: From central / base load to decentral / volatile

Old Electricity World

New Electricity World
• Adapt market rules to new realities

• Reduce state interventions – use markets

• Cooperate across borders
Issues for Trilogues

• Adapt market rules to new realities
  • Rule to guarantee more open borders (Art 14 E-Reg.)
  • Regulated Prices (Art 3 E-Directive)

• Reduce state interventions – use markets
  • Regional adequacy assessment as condition for Capacity Mechanism?
  • “550 g” condition – as of when?

• Cooperate across borders
  • Powers of ACER: Reduced? Kept? Enhanced?
  • TSO cooperation – status quo or new competences for “RSCs”?
Clean Energy Package => Timing

- Common Council Position: (+)
- Parliament Position: (+)
- “Trilogues”:
  EE, RES, Effizienz: => 1st Half of 2018
  Market Design
  => 2nd Half of 2018
- Entry into Force: 2020
- Directive Transposition: Mid/end 2021
Thank you very much