STATE OF ACQUIS IMPLEMENTATION in the ENERGY COMMUNITY and activity report

17th December 2020
Overview of Implementation Performance 2020
Overall implementation score annual change

Overall implementation score: 53% (+5% change)

Status 2019 (%) | Change 2020 (%)
--- | ---
Albania 54% | 45%
Bosnia Herzegovina 29% | 22%
Georgia 90% | 81%
Kosovo* 58% | 51%
Moldova 47% | 41%
Montenegro* 69% | 64%
North Macedonia 59% | 57%
Serbia 56% | 54%
Ukraine 61% | 58%

* Due to the lack of a gas market, implementation of the gas acquis is not taken into account in the overall score of Kosovo* and Montenegro.
Electricity implementation score annual change

Overall implementation score on electricity: 60% (+5% change)

- Status 2019 (%)
- Change 2020 (%)

Level of implementation achieved (%)

- Albania 69%
- Bosnia Herzegovina 55%
- Georgia 52%
- Kosovo 62%
- Moldova 49%
- Montenegro 77%
- North Macedonia 82%
- Serbia 65%
- Ukraine 49%

Energy Community Contracting Parties
Overall implementation score on gas: 36% (+4% change)

- Status 2019 (%)
- Change 2020 (%)

Energy Community Contracting Parties

* Due to the lack of a gas market, implementation of the gas acquis is not taken into account in the overall score of Kosovo* and Montenegro.
Sustainability implementation score annual change

Overall implementation score on sustainability: 58% (+1% change)

- Status 2019 (%)
- Change 2020 (%)

Level of implementation achieved (%)
Progress towards meeting the cap energy consumption 2020 targets

![Bar chart showing progress towards the 2020 energy consumption targets for various countries within the Energy Community. The chart includes data for Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, Ukraine, and the total Energy Community (EnC) as a whole. The chart compares the implementation of 2020 targets, the 2020 EnC target for the Energy Community, and national targets (ambitions).]
2020 Renewables target

Share of RES in gross final energy consumption

- Albania
- Bosnia and Herzegovina
- Kosovo
- Moldova
- Montenegro
- North Macedonia
- Serbia
- Ukraine

2018
2020
Emissions from large combustion plants vs NERP ceilings

**Bosnia and Herzegovina**

**North Macedonia**

**Kosovo**

**Serbia**

**Ukraine**

The Energy Community Secretariat | 18th Ministerial Council, 17 December 2020
Total number of cases

- Article 91 cases
- Article 92 cases
ALL OPEN CASES

**Serbia**

**Article 91: 2 cases**
- ECS-13/17 – gas (Horgos)
- ECS-1/20 – environment

**Article 92: 2 cases**
- ECS-09/13 S – gas
- ECS-10/17 S – gas (Yugorosgaz)

**Bosnia and Herzegovina**

**Article 91: 5 cases**
- ECS-1/15 – environment
- ECS-5/17 – electricity
- ECS-10/18 – state aid (Tuzla 7)
- ECS-1/14 – energy efficiency
- ECS-03/18 – infrastructure

**Article 92: 3 cases**
- ECS-8/11 S – gas legal framework
- ECS-2/13 S – environment (sulphur in fuels)
- ECS-6/16 S – Third Energy Package

**Georgia, North Macedonia, Montenegro:**

0 cases

**Moldova**

**Article 91: 3 cases**
- ECS-14/16 – energy efficiency
- ECS-9/17 – electricity
- ECS-7/18 – environment (LCPD)

**Kosovo**

**Article 91: 3 cases**
- ECS-7/11 – state aid
- ECS-6/18 – environment
- ECS-4/19 – state aid

**Ukraine**

**Article 91: 3 cases**
- ECS-6/17 – electricity
- ECS-8/14 – state aid
- ECS-4/18 – infrastructure

**Article 92: 1 case**
- ECS-1/18 S – energy efficiency (EED)
The NECP process has started in most of the CPs with the development of integrated methodological tools and initiating national stakeholder consultations.

Some have already started to draft the national plans and submitted drafts to the Secretariat for informal review. North Macedonia has submitted its official draft for recommendations.

The legal basis is also being developed in most of the Contracting Parties.

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<table>
<thead>
<tr>
<th>ALBANIA</th>
<th>BOSNIA &amp; HERZEGOVINA</th>
<th>KOSOVO*</th>
<th>NORTH MONTENEGRO</th>
<th>SERBIA</th>
<th>GEORGIA</th>
<th>MOLDOVA</th>
<th>UKRAINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal basis for NECP provided</td>
<td>NECP fully operational</td>
<td>NECP drafted</td>
<td>EnC informal review</td>
<td>EnC formal review</td>
<td>NECP submitted</td>
<td>NECP updated</td>
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1) EnC and National legal basis exists;
2) Set up of organizational structure and engagement of experts for the NECP development process; (work started / legal draft available)
3) Drafting of NECP chapters as described in Regulation (EU) 2018/1999 (Governance Regulation) and/or Recommendation 2018/01/MC-EnC.
4) NECP updated in 2023

- Finished (Submitted to EnCS / adopted)
- Started (work started / legal draft available)
- Planned (plans communicated)
Direct subsidies to coal-fired production of electricity 2015-2019 in EUR million
Fuel Quality Directive 98/70/EC (as amended) CPs Transposition – Where do we stand?

- Albania - Sulphur content in gas oil for NRMM not yet transposed
- Bosnia and Herzegovina - a new Decision needed - sulphur 10 mg/kg (petrol, diesel and gas oil for NRMM)
- Georgia - Gas oil for NRMM to be transposed
- Kosovo* - Sulphur content in gas oil for NRMM should be specified
- Moldova – should include the gas oil specifications for NRMM
- Montenegro – fully compliant
- North Macedonia - gas oil for NRMM should be addressed
- Serbia - Gas oil for NRMM should be transposed with sulphur content up to 10 mg/kg
- Ukraine - Gas oil used for NRMM is not specified.

MC Recommendation (2018/2/MC-EnC) & Secretariat suggestion

- CPs, the Secretariat and the EC should identify the provisions of Directive 98/70/EC suitable for incorporation in the Energy Community, the necessary adaptations as well as appropriate deadlines
- Public Consultation (August 2020): 90% agreed with the core elements suggested to be part of a future FQD at the level of the Energy Community

Core elements suggested by the Secretariat apply to:
- Petrol (including bioethanol used in road transport)
- Diesel (including Fatty Acid Methyl Ester used in road transport)
- Gasoil used in non-road mobile machinery
Secretariat’s reviews of national legal acts per country in first to third quarter of 2020 – 135 acts

<table>
<thead>
<tr>
<th>Contracting Party</th>
<th>Number of reviews</th>
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<tbody>
<tr>
<td>Albania</td>
<td>10</td>
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<tr>
<td>Bosnia and Herzegovina</td>
<td>44</td>
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<tr>
<td>Georgia</td>
<td>14</td>
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<tr>
<td>Kosovo*</td>
<td>2</td>
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<tr>
<td>Moldova</td>
<td>13</td>
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<tr>
<td>Montenegro</td>
<td>4</td>
</tr>
<tr>
<td>North Macedonia</td>
<td>7</td>
</tr>
<tr>
<td>Serbia</td>
<td>4</td>
</tr>
<tr>
<td>Ukraine</td>
<td>37</td>
</tr>
</tbody>
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2020 communication and outreach in numbers

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<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>107  Events</td>
<td>6,480  Event participants</td>
</tr>
<tr>
<td>73,715  Unique website visitors</td>
<td>39,366  Website downloads</td>
</tr>
<tr>
<td>4  Policy Guidelines</td>
<td>3  Studies</td>
</tr>
</tbody>
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ALBANIA HIGHLIGHTS

- Review of the Energy Efficiency Law
- Review of the Renewables Auction Rules
- 9 other legal acts reviewed
- Review of draft National Energy and Climate Plan
BOSNIA AND HERZEGOVINA HIGHLIGHTS

- Review of the State Law on Electricity Market and Energy Regulator
- Review of the draft Investor Guidelines on the Reform of the Support Schemes
- 42 other legal acts reviewed
- Opinion on certification of Gas Promet
GEORGIA HIGHLIGHTS

- Drafting the Gas Market Concept Design
- 7 other legal acts drafted
- Review of the Law on Energy
- Review of the National Energy Efficiency Action Plan
- Review of draft National Energy and Climate Plan
KOSOVO* HIGHLIGHTS

- Review of long-term strategy for mobilizing investment in the renovation of buildings
- Review of REMIT transposition
- Review of the Law on Compulsory Oil Stocks
- Review of the National Energy Efficiency Action Plan
MOLDOVA HIGHLIGHTS

- Review of draft amendments to the sectoral laws on electricity and gas
- Review of wholesale electricity market rules and guidelines for electricity procurement
- 11 other legal acts reviewed
- Review of the National Energy Efficiency Action Plan
Albania highlights

- Review of draft amendments to the Energy Efficiency Law
- Review of methodology for calculation of the energy efficiency target
- 3 other legal acts reviewed

Montenegro Highlights
Review of Energy Efficiency Law
- 5 other legal acts reviewed
Review of the National Energy Efficiency Action Plan
Review of the draft National Energy and Climate Plan
Review of National Energy Strategy
Opinion on the participation of the Energy Regulatory Commission in ACER
SERBIA HIGHLIGHTS

- Review of Law on Climate
- Review of regulation on minimum energy performance requirements of buildings
- Review of secondary legislation for the implementation of the implementation of EPBD
Albania highlights

The Energy Community Secretariat      18th Ministerial Council, 17 December 2020

- Drafting the Public Service Obligation Act for the Energy Sector
- Review of amendments to the Electricity Market Law
- 35 other legal acts reviewed
- Review of the National Energy Efficiency Action Plan
- Opinion on certification of Ukrenergo
THANK YOU
FOR YOUR ATTENTION

GET IN TOUCH

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