24th Athens Forum
28 - 29 May 2019
Poll results
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- What is the main barrier for the functional, harmonised operation of the connected power systems and full market integration in the EnC region?
- There is no clear regulation which can solve actual question- which of two offices will operate a cable auctions- JAO or CAO. If there is no clear regulation in this regard, what should be a solution?
- Survey
The Athens Forum is an excellent opportunity to:

- hear about latest electricity market developments and trends: 76%
- kick-off the holiday season: 15%
- mingle with colleagues and friends: 29%
- none of the above: 7%
What is the change in the Clean Energy Package regarding market design which is most relevant for you?

- Stricter regime for Capacity mechanisms
- Coal capacity restrictions.
- Prosumers
- A framework for all types of capacity mechanisms.
- Adapting market to flexibility
- Consumer empowerment
- Requirements on interconnection capacity
- Consumer empowerment
- Imbalance costs for RES producers.
- Getting close to customer taking care of environment
- The 70% rule for the calculation of cross-border capacity
- Phase out of price regulation
- Clear support to renewables
Open text poll

Survey (2/2)

Could implementing some of the new rules be problematic in your country? Which?

- Dynamic pricing for end consumers due to lack of proper metering equipment.
- Challenges for sharing costs of achieving the 70% capacity
- Political support
- Ambitious targets
- Digitalisation and cyber security
- CACM
- The will and inertia of key stakeholders
- Regulation of independent aggregators and local communities is unnecessary and could result in market distortions.
- Phase out of price regulation
- Renewable support and market integration
Where do you see the main progress in the development of electricity markets in your country?

- No progress
- Market Coupling with neighbours & (merchant) RES development - altogether with finalization of development and practical implementation of Regional Balancing Mechanism.
- Deregulation on wholesale Markets
- Market coupling
- no progress
- Smart metering
- consumer rights
- Internal interconnections
- Cross border trade
Multiple-choice poll

What is the main reason behind the slow development of day-ahead markets in the Energy Community?

- Lack of political support: 49%
- Uncertainty about an impact on the electricity prices: 16%
- Uncertainty about the coupling with EU markets: 16%
- Difficulties to coordinate with neighbouring countries: 18%
- None of the above: 2%
Panel Debate I (1/2)

Do you think that market coupling between EU Member States and the Energy Community will happen within the next years?

On a voluntary basis 55%

Only when it becomes legally binding 45%
Panel Debate I (2/2)

**Do you think that the first market coupling involving the Energy Community Contracting Partie(s) will happen in 2020?**

- **Yes**: 59 %
- **No**: 41 %
Panel Debate III (1/3)

Do you see risks for the security of electricity supply due to the phase-out of coal, the rise of intermittent renewables, and/or a lack of investment?

Yes 69%
No 31%
Do you see the markets in the Energy Community as fit enough to take care of the challenges of the energy transition?

Yes 41%

No 59%
Multiple-choice poll

Panel Debate III (3/3)

Do you see capacity mechanisms as applied by many EU Member States and some Contracting Parties as

YES, a useful complementary measure

63%

NO, detrimental to the liberalization process

37%
If any, where do you see the main risks resulting from capacity markets?

(1/2)

- No risk, they will just be needed to keep electricity production stable: 21%
- Further distortions of the market: 11%
- Disincentive to demand response: 4%
- Extra costs for customers: 29%
- Possibility for established producers to get extra subsidies: 32%
Multiple-choice poll

If any, where do you see the main risks resulting from capacity markets?
(2/2)

tend to benefit CO2-intensive producers

4 %
Cleaning up (1/3)

**What will be the share of electricity from coal in 2050 in the Energy Community?**

- The same as today: 9%
- Reduced: 61%
- Increased: 0%
- Coal will be phased out: 26%
- I don't know: 4%
Cleaning up (2/3)

Do you support introduction of a carbon price mechanism in the Contracting Parties?

Not in the foreseeable future
- 14%

As soon as possible
- 50%

Yes, but slowly and prudently
- 36%
Do you agree with the following statement: “relying on domestic coal is the best means to maintain affordable electricity”

I fully agree
17%

I fully disagree – this is a shortsighted view that sells environment and climate protection over political quick-wins
43%

The truth is in the middle
39%
Should there be a more tolerant approach to using coal in South East Europe?

Yes, the difficult economic situation doesn't justify the high costs of investing in carbon-free production  
53%

No, renewable energy is the cheapest production source today and South-East-Europe is a perfect place for renewables.  
47%
Multiple-choice poll

Do you agree with the following statement: “interconnected electricity systems with non-Energy Community countries need common legal rules”?

I fully agree - different rules create an unfair misbalance of market players’ obligations
- 44%

I partly agree - only a minimum set of common technical rules is needed to ensure safe system operation
- 50%

I don’t agree at all - bilateral contractual arrangements are enough
- 6%
I think the Energy Community should further intensify cooperation with:

(1/2)

Mediterranean countries – we share common members and common electricity market targets, e.g. regional electricity market establishment

0 %

Turkey – the Turkish electricity market would add liquidity to the Region and builds a bridge to the Georgian electricity market

38 %

Azerbaijan – the ongoing reform process is an encouraging signal

8 %

All of them

46 %
Multiple-choice poll

I think the Energy Community should further intensify cooperation with:
(2/2)

None of them  8 %
Multiple-choice poll

What is the main barrier for the functional, harmonised operation of the connected power systems and full market integration in the EnC region?

- Lack of physical interconnections (adequate infrastructure) 9%
- Regulatory barriers (need for regulatory framework alignments) 91%
There is no clear regulation which can solve actual question- which of two offices will operate a cable auctions- JAO or CAO. If there is no clear regulation in this regard, what should be a solution?

- Split LT on one and short term on the other until both Auction offices merge
- What amount of capacity of the cable will be auctioned? 500, 600 or ? MW
- Since from the Montenegrin side there is a number of smaller power systems with a number of a local market players, SEE CAO is might be preferable, but if no agreement (who to agree?) then 50/50%.
- the auction - the better offer wins
Has introducing coordinated capacity allocation on Turkey-Greece border, or between energy community contracting parties, increased allocated volumes of cross border transfer capacities?

- Yes, among other reasons, due to larger number of auction participants.
Can introduction of coordinated capacity allocation increase TSO incomes from auctions?

- Irrelevant if NRAs controls TSO incomes.