



CESEC

Energy Community- Monitoring of Action Plan

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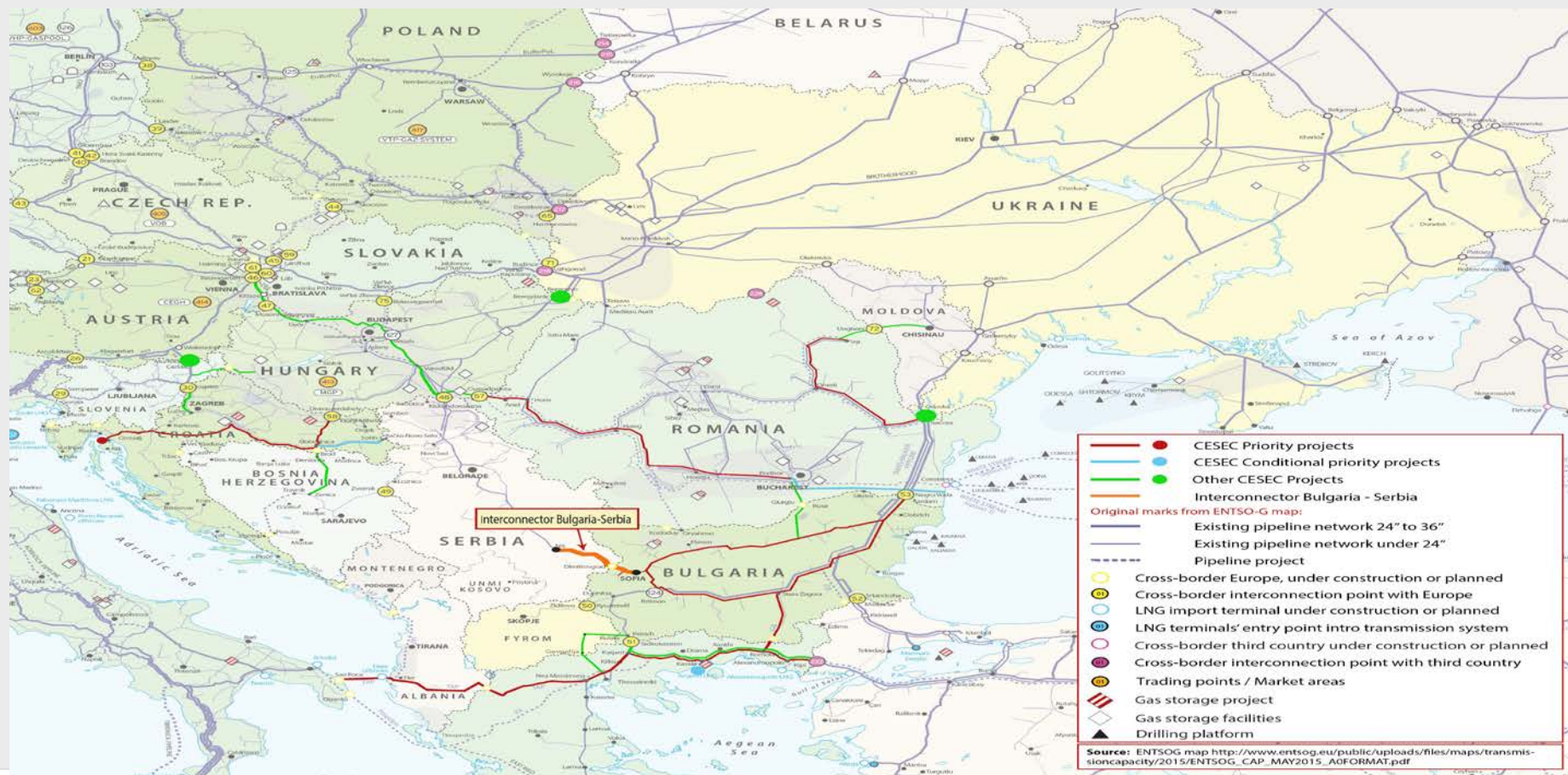
July 2015 MoU– signatory parties

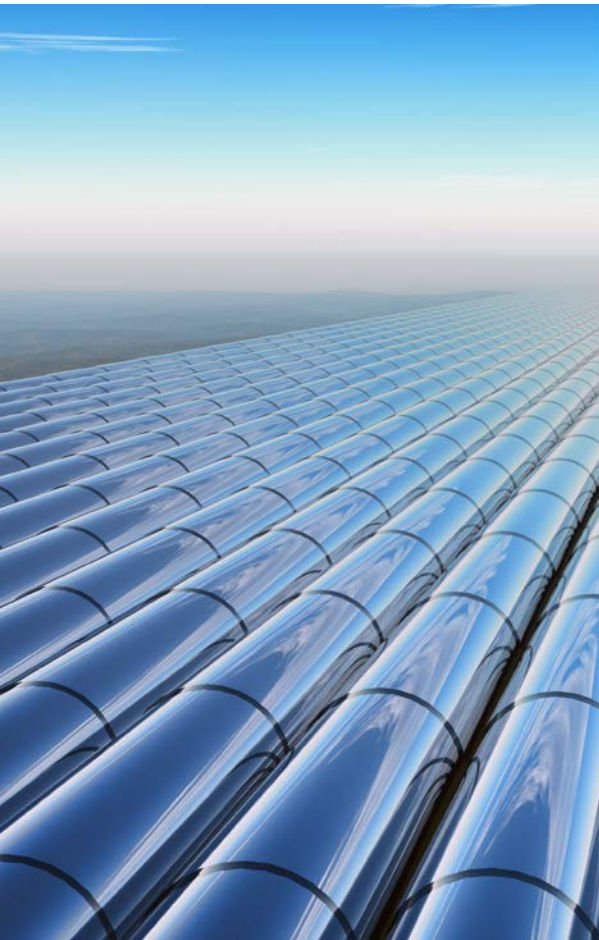
- EU | **AL** | AT | BG | **FYROM** | GR | HR | HU | IT | ROM | SI | SK | **SRB** | **UA**
- **MD signed in October 2015**
- **Action plan: infrastructure projects (challenges and financing) + market integration measures**

Priority projects

- **TAP** (*already decided*)
- Interconnector GR-BG (IGB)
- **Interconnector BG-SRB**
- System reinforcement BG
- System reinforcement ROM
- LNG Terminal HR
- LNG evacuation system towards HU

Map of CESEC Projects





From the CESEC MoU:

1. **“Effective regulatory framework [...] including regulatory incentives is a prerequisite”**
2. Commitment to „**promote market integration and well-functioning markets**” by:
 - a. “effectively and fully implementing all EU gas sector legislation”
 - b. “removing remaining legal, regulatory and commercial barriers to physical and commercial gas flows”
 - c. “particularly across borders, via efficient use of interconnections and effective gas network access”
3. „ACER, the European Commission or the **Energy Community should act as a facilitator** to any regulatory issue of a cross-border nature”

Translating the MoU into practical progress



ECS activities to **monitor and facilitate** CESEC:

1. **List of measures for implementing *market* related CESEC elements** developed & communicated to the CPs
2. **Country missions** targeting discussions of national implementation steps ongoing
 - ☞ Ministries to coordinate
 - ☞ All relevant stakeholders to be involved
3. **Continuous progress reporting**
 - ☞ as member of the CESEC meetings
 - ☞ **Standard report publication - 1st edition 12/2015** (market and infrastructure related)
 - ☞ EnC and EU Gas Fora

CESEC – ECS monitoring roadmap

MoU criteria	National relevance
Ensuring transparent and non-discriminatory third- party access	Establish capacity allocation mechanisms and congestion management rules allowing TPA in forward and reverse flow
	Establish market- based balancing mechanisms
	Develop transparent and non- discriminatory tarification rules that do not distort trade across borders (avoid pan-caking)
Ensuring free flow of gas and provision of competitive framework	Remove legal or contractual barriers to competition
	Ensure barrier-free market entry
	Optimise actual capacity use in both directions, including backhaul
Infrastructure related measures	Adopt interconnection agreements
	Provide a cross- border cost allocation mechanisms in line with Regulation (EU) 347/2013
	Ensure harmonised framework of operation of interconnected EU MS- EnC CP systems
Cross-cutting measures	Ensure independence of national energy regulatory authorities based on pre-defined indicators
	Unbundle and certify transmission system operator in line with the Third Energy Package
	Apply for observer status in ACER based on a positive opinion of the European Commission
	Increase effectiveness of national administrative authorities, including for competition and State aid
Measures required for market integration	Discuss possibilities to integrate gas markets with neighbouring EU and EnC gas markets

First results- overview

	Albania	FYR of Macedonia	Serbia	Ukraine
Ensuring transparent and non- discriminatory third- party access	Progress on track	No progress	Progress on track	Significant progress
Ensuring free flow of gas and provision of competitive framework	Progress on track	Progress on track ¹	Progress on track ²	Progress on track
Infrastructure related measures	Progress on track	Progress on track	Progress on track	Progress on track
Measures required for market integration	Progress on track	Progress on track	Progress on track	Progress on track
TSO unbundling	No progress ³	No progress	No progress	Progress on track
NRA independence	Progress on track	Progress on track	Progress on track	No progress

^[1] With the exception of abolishing destination clauses in supply contracts

^[2] With the exception of abolishing anti- competitive clauses in Intergovernmental Agreement and transit contracts

^[3] With the exception of TAP certification



*Thank you
for your attention!*

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