Governance of the Energy Community Region

9th Oil Forum, 27-28 November 2017, Belgrade
Why?
Creating single regulatory and market framework to:

- increase energy trade,
- attract investments,
- enhance security of supply,
- improve environmental situation and
- increase competition in the energy market

How?
By the Rule of Law
The Energy Community acquis and areas of work grew to 18 Directives, 9 Regulations…

- Gas
- Electricity
- Infrastructure
- Renewable energy
- Environment
- Competition
- Oil
- Social
- Statistics
- Energy Efficiency
Energy reforms - Where are we now?

- First & Second Energy Package
- Third Energy Package TRANSPOSITION
- Third Energy Package IMPLEMENTATION
- “Clean Energy Package” = Fourth Energy Package Network Codes

- National renewables targets to 2020 (approx. 15% EnC wide target)
- 20% EnC wide energy efficiency target by 2020
- ...but the gap with the EU widening
Third Package Transposition in Contracting Parties
Overview of Implementation Performance by Contracting Parties
Challenges for 2018

• Treaty amendments (reciprocity, better enforcement of the law, direct applicability of Regulations)

• Belarus as Observer; Georgia as a newcomer (EU4Energy)

• Design 2030 EE/RES targets (Clean Energy for all Europeans)

• Dispute Resolution Centre
How to achieve?

1. **Treaty reforms**: create a level playing field and close the regulatory gap between CPs and MSs (among other topics)

2. **Title III measures** to foster market integration: harmonisation of licenses

3. **Ensure a common legal framework**: keep pace with EU developments
   - Implementation of gas network codes: first set targeted for adoption in 12/2017 (2 in gas, 1 in electricity)
   - REMIT

4. **Promote effective market reforms** such as „Energy Community Gas 2020 Action“ or through WB6
Regional perspectives – gas case study

- **a good basis to build on**: regional cooperation between Title III countries *de facto* already happens

- **but**: creating and preserving trust in markets requires a solid common *legal* framework for the Title III countries!
National outlooks - gas

- Unbundling - Serbia
- Unbundling - Ukraine
- Bosnian deadlock
- Progress in Albania
- Moldova – crossroads
- Georgia – newcomer

Third Package transposed
On the gas market side: where do we stand?
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