



European and National Framework of Retail and Consumer Empowerment Monitoring – joining forces

Fostering energy markets,
empowering **consumers**.

Deniz Erdem, BNetzA, Co-Chair of CEER Monitoring Retail Markets Workstream
Florian Pichler, E-Control, Co-Chair of CEER Monitoring Customer Empowerment Workstream
Brussels, 25 June 2019

Agenda

- Introduction
- Current market monitoring – status quo
 - ▶ CEER Monitoring Report on the Performance of European Retail Markets in 2017
 - ▶ ACER-CEER MMR
- Future market monitoring
 - ▶ Outlook and challenges
 - ▶ Impact of Clean Energy Package



Objectives

- ▶ To formulate adequate expectations concerning monitoring outcomes
- ▶ To define weaknesses in current monitoring and find remedies for them
- ▶ To investigate Clean Energy Package consequences for European and national monitoring



Introduction

- CRM WG: MRM, MCE
- Products:
 - ▶ CEER Monitoring Report on the Performance of European Retail Markets
 - ▶ ACER-CEER Report on the Results of Monitoring the Internal Electricity and Gas Markets – Consumer Empowerment Volume
- Tools for data collection and handling
 - ▶ CEER National Indicator Data Base
 - ▶ Lime Survey



Retail Monitoring Overview

Main topics (CEER)

- Markt structure
 - Number of suppliers + Entry/Exit
 - Markt shares and concentration
- Switching rates
 - Internal/External switching rates
 - Offers
- Intervention in price setting and price regulation

Main topics (ACER)

- Level and evolution of electricity prices
- Structure and drivers of energy prices for households
- Relationship between the wholesale price and the energy component of the retail price for households in the European Union



Consumer Empowerment Overview

Main Topics

- Public Service Obligations (PSOs)
- Protection of vulnerable consumers
- Consumer information rights
- Smart metering
- Consumer choice
- Consumer complaints and handling

Recommendations



Challenges

- Data collection
 - ▶ Design of indicators
 - One size does not always fit all – but otherwise we do case studies!
 - ▶ Deadlines
- Data generation/delivery
 - ▶ Data based on aggregations over many companies in MS
- Data quality
 - ▶ Variable understanding over time and countries
 - ▶ Reliability, validity, objectivity
- Analytical skill/feedback
 - ▶ Sufficient resources
 - ▶ Timing
- IT-related issues
 - ▶ Data storage / archive
 - ▶ Corrections



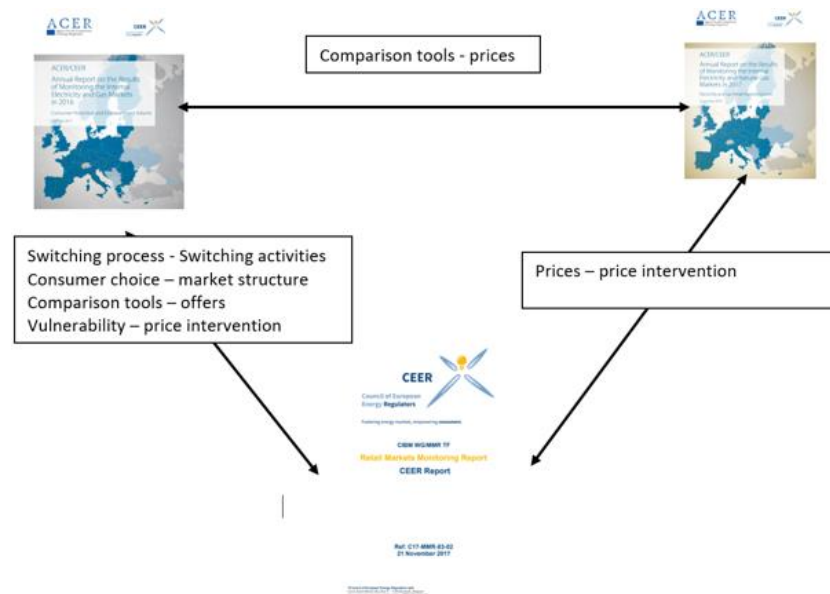
In the future I

- Extended versions of the Consumer Empowerment and Retail Monitoring
- Retail and consumer empowerment aspects move more closely together, e.g.
 - ▶ Prosuming: producing, selling and consuming
 - ▶ Active consumption: time-based more/less use of electricity
 - ▶ Spot-market based action: aggregation, demand response
 - ▶ Competition and comparability



In the future II

- CEER: bringing closer together retail and consumer empowerment monitoring in the future
 - ▶ integrates *CEER Retail Report* elements into the current consumer choice section
 - ▶ puts consumer perspective to the fore, examining retail issues also through a consumer lens
 - ▶ critically discusses *intervention in price setting with a view to protection of vulnerable consumers*



Clean Energy Package

- Monitoring impact of market developments for household customers
- Regulatory barriers for new market entries
- New responsibilities and opportunities for monitoring, including
 - ▶ Consumer empowerment
 - Novel concepts: active customer, citizens energy community
 - More detailed rights: dynamic price contracts, switching, bills and billing information, demand response (aggregation)
 - Specified tools: CTs, (smart) meters
 - Protections: energy poverty



Thank you for your attention!



CEER

**Council of European
Energy Regulators**

www.ceer.eu

