



National Experiences in view of the Clean Energy Package

Founded in 2017 by:

ACIE: Asociación de Comercializadores Independientes de Energía / Association of Independent Retailers – SPAIN
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Oberoende Elhandlare / Independent Electricity Retailers – SWEDEN



Spain: Data access as a key to new services

Antonio Colino
ACIE

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Data access as a key to new services



Clean energy for all Europeans



CLEAN ENERGY FOR ALL EUROPEANS

WHAT ARE OUR GOALS?

CREATING JOBS & GROWTH, BRINGING DOWN GREENHOUSE GAS EMISSIONS, SECURING ENERGY SUPPLY



Putting energy efficiency first



Demonstrating global leadership in renewables



Delivering a fair deal for consumers

Data access as a key to new services



Empowering consumers means...

Demand management

Smart meters

Data flows

Granting the right to self-consumption



Retailer's & aggregator's opportunities to comply with this empowering...

Demand aggregation services

Metering services

Self-consumption products

Contract Optimization

Energy Efficiency

Effective competition in retail markets

Strong development of renewables

Well-functioning interrelation between wholesale and retail markets

So, best regulation may provide....

Data access as a key to new services



Let's have a look at Smart Meters... (where the voice of retailers & aggregators shall also be taken into account)

The technology chosen to transmit data should not constitute an obstacle for competition:

- Transmission of Smart Meter measurements through different technologies (Wireless; PLC; GPRS). Readiness of the device to be connected through different technologies.
- Interoperability between different sorts of smart meters (electricity, gas, water, etc.).
- Smart meter functionalities should be agnostic to the delivery mechanism, protocol, and technical solution, but provide the same outputs to the end customer.

Need for EU BINDING SPECIFICATIONS ON FUNCTIONAL REQUIREMENTS:

- Bidirectional communication (favoring distributed generation and, as a result, microgeneration)
- Establishment of a standardized open gateway (access by suppliers / service providers specifically foreseen by binding regulation)
- Consumer data stored in the smart meter for long periods (additionally to meter data repository storage)

All concerned market actors should be able to receive the information they need to comply with their market role obligations at the same time

Metering
Operator





Italy: How customers and competition will shape clean energy

**Michele Governatori – Past President
AIGET**

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Who wants cleaner energy?



- Support to clean energy should be based on
 - Internalization of climate change costs
 - Willingness to contribute by final customers



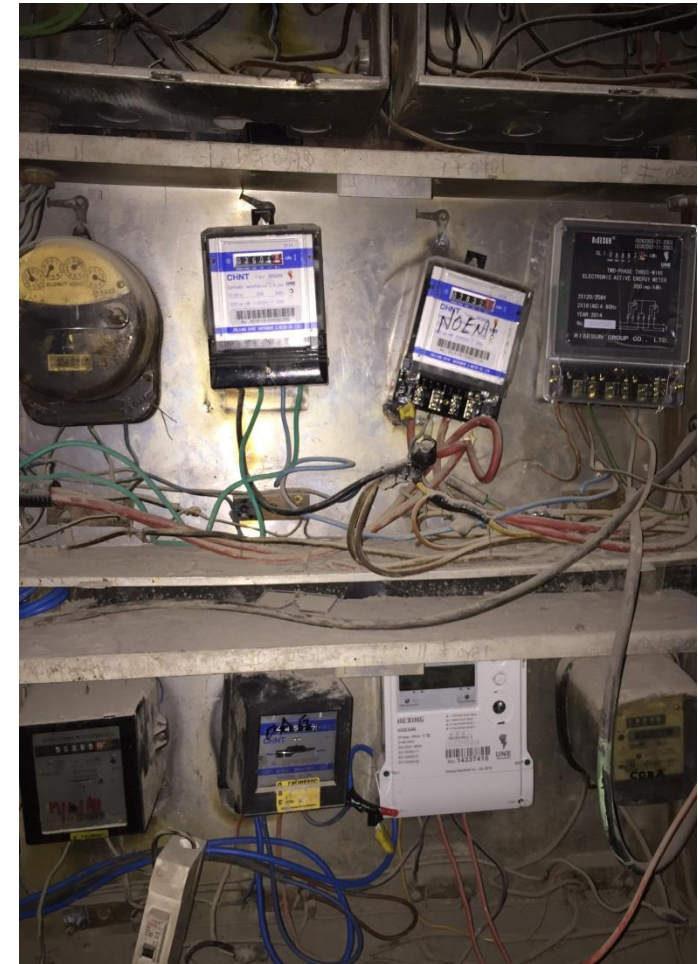
- ETS should not have exemptions (e.g. for «carbon leakage»)
- Guarantees of origins should be granted whether the same energy already gets national support or not
 - If support is decided on a competitive basis, it will internalize the value of the GOOs -> double incentive is not an issue



Who wants to control his own energy?



- People like controlling their consumption if they can influence it
 - It requires having convenient and effective access to meter data
 - Meters should be able to interact with hometech appliances

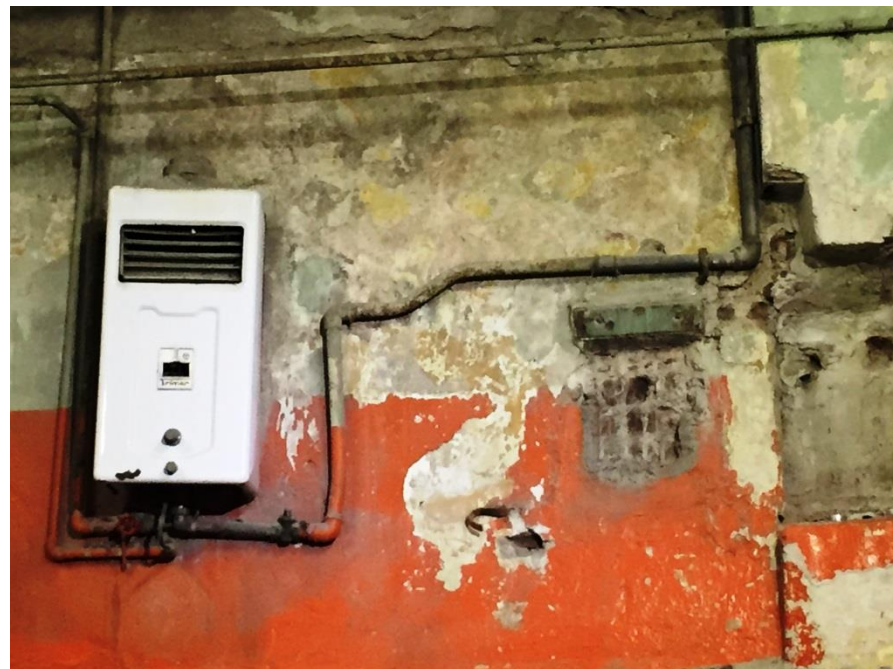




Who has grown up and can now choose?



- Customers have the right to:
 - Look for lower prices
 - Look for more useful services
 - Look for cleaner energy
 - Be loyal to their supplier if this means a better deal for the consumer





Sweden: Unlocking flexible demand

Johan Öhnell – President
Independent Electricity Retailers

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Household customers



- Flexible demand needed to integrate renewable energy
- Household customers are key to more flexible demand
- Industry and larger property owners are already active
- In Sweden, homeowners stand for the greatest potential to control their consumption
- Hourly (or more frequent) metering and settlement for all households needed
- Energy retailers can develop new customer agreements with incentives



Other challenges



- Electricity companies must have the freedom to design contracts and invoices
- Electricity companies should be able to use the invoice as a communication tool
- Current Swedish proposal: Energy tax as a percentage tax on electricity price, not per kWh
- Structure of Network tariffs has to be regulated to create at least a national standard



France: The role of alternative players to enhance competition of the French energy market

Marc Boudier – President
AFIEG

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Evolution of alternative suppliers' market shares on the French electricity and gas markets



2010

Residential sites

Non-residential sites

Number of sites

5,2%

7,2%

7,6%

18,4%

Annual consumption

5,1%

6,5%

16,1%

29,5%

2012

Residential sites

Non-residential sites

Number of sites

6,9%

11,3%

7,6%

22,8%

Annual consumption

7,2%

10,8%

20,8%

40,9%

2017

Residential sites

Non-residential sites

Number of sites

16%

24,6%

19,2%

40%

Annual consumption

13,6%

24,3%

37,8%

67,9%

Source : Observatoires des marchés of the Commission de régulation de l'énergie (CRE)

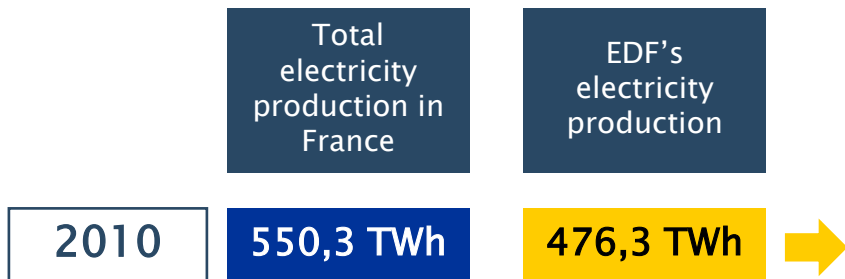
- Wider opening of the market in the gas sector compared to the electricity sector.
- In the electricity sector, the incumbent still owns about 85% of the market share.
- The alternative players have more market shares at the B2B level than at the B2C level.
- The opening process has accelerated in the past five years.

x% Electricity market

x% Gas market



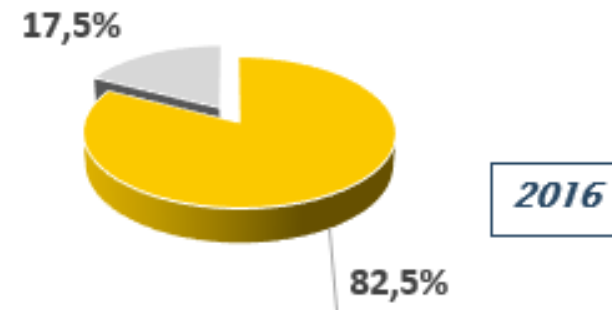
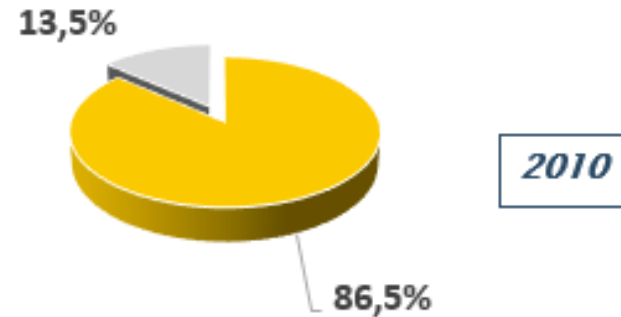
Concentration of electricity production on the French market



Sources :
RTE, Bilan énergétique 2010;
Groupe EDF, Rapport d'activité et de développement durable 2010, performances opérationnelles par pays



Sources :
RTE, Bilan électrique 2016,
Groupe EDF, Cahier de performance 2016



- High concentration of the market
- Still some major bottlenecks such as the opening of hydroelectric concessions to competition,
- Importance of mechanisms such as ARENH (Regulated Access to Historic Nuclear production source)
- Lack of representation of the alternative players in the relevant bodies such as the *Conseil Supérieur de l'Énergie*, which is consulted on each draft regulation and law



THANK YOU

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