



Fostering energy markets, empowering **consumers**.

CEER 2020 Work Programme

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Table of contents

1. Introduction	3
1.1. Who is CEER?	3
1.2. CEER as a valued partner	3
2. CEER’s 3D Strategy (2019 - 2021)	3
2.1. Digitalisation in the consumer interest.....	4
2.2. Decarbonisation at least cost.....	4
2.3. Dynamic regulation	4
3. CEER work areas in 2020.....	5
3.1. Consumers in an increasingly digital world and retail markets	5
3.2. New legislative/policy developments.....	6
3.3. The role of Distribution System Operators.....	6
3.4. Gas and electricity market developments	6
3.5. International work beyond the borders of the EU	7
3.6. Other work areas	7
4. CEER Work Programme 2020 – Results	8

1. Introduction

1.1. Who is CEER?

The Council of European Energy Regulators (CEER) is the European association of energy national regulatory authorities (NRAs). CEER supports the important work of NRAs to foster a sound European regulatory framework. CEER does this by developing good practices in energy regulation and sharing experience including through training, workshops and international collaboration with other regulatory bodies within and outside of Europe. CEER champions the development of competitive and innovative markets in the public interest through robust, independent regulation. For more information about CEER and our work, please visit our website www.ceer.eu.

1.2. CEER as a valued partner

CEER cooperates closely with the EU Agency for the Cooperation of Energy Regulators (ACER), and our respective work complements and strengthens one another's roles. ACER has a legislative mandate and responsibilities related to the cross-border regulatory framework for the effective operation of Europe's Internal Energy Market (IEM). CEER's scope of activities and its membership consist of the regulators from the EU and EEA Member States and has 9 European NRAs as Observers.

CEER (as a voluntary association) has the freedom to develop bold, forward-looking European visions and solutions in the public interest. CEER is on the frontline of delivering the IEM in important areas where ACER does not have the resources or a mandate, and in respect of implementing and enforcing EU-wide rules nationally. The experiences shared and nourished within CEER help inform the policy cycle and ultimately help Europe's energy NRAs and ACER in working on behalf of the energy consumer.

CEER will continue to be active in supporting the European institutions to further develop and implement measures to enhance the IEM. We anticipate that the CEER Work Programme for 2020 will need to be adapted to take account of these expected developments, for example in relation to adopted Clean Energy legislative proposals. The changes will bring considerable benefits from a consumer, an environmental and economic perspective as well.

2. CEER's 3D Strategy (2019 - 2021)

Each year CEER publicly consults on its Work Programme for the year ahead, so we did also in 2019. CEER thanks 19 respondents, who provided their valuable views to accomplish items in 2020. All items are related to elements of CEER's 3D strategy. CEER provides its views on the stakeholders' comments in the [Evaluation of Responses](#) document which is published together with this Work Programme.

In brief, the core elements of CEER's 3D strategy for the period 2019-2021 are:

- Digitalisation in the consumer interest (D1);
- Decarbonisation at least cost (D2); and
- Dynamic regulation-European solutions for adaptive regulation in a fast-changing world (D3).

As regulators' primary concern is with protecting the interests of European consumers, consumers are at the very core of [CEER's 3D Strategy](#).

2.1. Digitalisation in the consumer interest

Digitalisation is driving changes for the whole economy, including the energy sector. In setting digitalisation as a strategy policy area (D1), regulators seek to enable digitalisation in the consumer interest. From consumer interest perspective, the value propositions of digitalisation are mostly – cost savings, convenience, greater choice of prices, products and service.

2.2. Decarbonisation at least cost

The climate agenda and “Clean Energy” objectives are major policy drivers for change in the energy sector. Importantly, CEER’s decarbonisation policy priority area is about decarbonisation at least cost (and not decarbonisation per se). Cost-efficient decarbonisation of the energy sector needs a cross-sectoral (electricity and gas) and whole system approach, keeping in mind all aspects: wholesale, networks, retail and potential impacts on infrastructure development. It also needs to factor in impacts on the electricity and gas sector from decarbonisation of mobility and building sectors (green mobility, efficiency etc.).

2.3. Dynamic regulation

CEER sees that regulation must be stable, but not static. Regulation must adapt to market evolutions, including a growing diversity and number of participants. Europe’s energy regulators are determined to make regulation coherent with the fast-changing environment that digitalisation and decarbonisation bring about, whilst continuing to protect the European energy consumers’ interests effectively.

Dynamic regulation refers to:

- full and coherent implementation in practice of the legislative and regulatory framework in the European Union;
- an appropriate oversight to ensure trust in the market; and
- a strong link between the evolution of the energy sector and regulatory implementation by developing future-proofed European solutions.
- an adaptive regulation, inciting regulators to evolve, to be open to innovation, and to work on enhancements to their regulatory frameworks, while pursuing reasonable stability, in order to ensure predictability for market players and readability for consumers.

3. CEER work areas in 2020

This CEER 2020 Work Programme comprises of 22 public work items, that consists of 6 activities (such as workshops or conferences) and 16 deliverables (reports). The work items are derived from the 3D Strategy: Digitalisation in the consumer interest; decarbonisation at least cost; and dynamic regulation. Although each work item is linked to the area of the 3D Strategy in many cases work items may also impact on other areas of the strategy. A central initiative during 2020 will be on dynamic regulation to enable the digitalisation of the energy system in the consumer's interest. However, there are also several work items categorised as "Digitalisation" and "Decarbonisation".

As the association of energy NRAs, CEER will continue to assist NRAs enhance their capability to fulfil their individual responsibilities to implement a competitive, sustainable and secure energy market in Europe. There will be reports, status reviews, workshops, events and training courses. We will continue to promote competitive retail markets. CEER emphasized Clean Energy Package implementation as well from different items' perspective. CEER will deepen its examination of how the role of DSOs is changing in the face of continuing legal and technical developments. Should be mentioned, most items in the 2020 Work Programme are new – approximately 60% with a deepen focus on 3D Strategy and CEP, and 40% – are annual items. This is the way further to a competitive, sustainable and secure energy market in Europe.

Moreover, we will consider how the regulatory framework should evolve dynamically to keep pace with those changes. We will monitor developments in cybersecurity. We will continue our international relations with regulators around the globe to exchange experiences and to respond to the growing interaction between the European internal energy market and its neighbouring markets.

3.1. Consumers in an increasingly digital world and retail markets

Consumers and retail markets will be an ongoing priority in 2020 (and beyond). This is why a large part of our 2020 Work Programme is dedicated to consumer protection and empowerment, and to well-functioning and competitive retail markets, with an emphasis on enabling consumers to engage more effectively in energy markets and energy regulation issues. Our indicators for the Market Monitoring will take into account insights from our work on Bundled Products and the CEER Roadmap to 2025 for Well-Functioning Retail Energy Markets, but also the need for designing new indicators and metrics to monitor the Clean Energy package implementation. CEER will also review the CEER-BEUC 2020 Vision for Energy Consumers, to assess milestones and progress, and consider what next steps should be necessary.

Energy retail markets are evolving rapidly, creating opportunities for energy customers, but also challenging established consumer rights regulation. CEER's priorities for 2020 will emphasize the evolution of energy markets and active involvement of consumers. CEER will focus on innovative business models looking at examples of aggregation, peer to-peer trading and other innovative business models emerging in the energy sector and beyond. The challenges which may arise for consumer rights will be especially highlighted.

CEER will work on billing in the context of the revised provisions in the CEP and also crosscheck changes in billing processes and billing information with the legislative provisions in the "New Deal for Consumers" legislative package.

CEER together with a Secretariat support and contribution will hold our dedicated Customer Conference next year as well.

3.2. New legislative/policy developments

CEER will respond to new legislative and other developments such as a future new legislative package on gas markets and decarbonisation, including regulatory aspects relating to the future role of low-carbon gases and sector coupling, as well as aspects of the European Green Deal that touch on energy regulation.

3.3. The role of Distribution System Operators

CEER will build its analysis of important aspects of the regulatory framework for DSOs relating to data management and smart metering. The CEER Digitalisation Paper, published in 2019, prioritises that DSOs should focus on the quality of their network data and data on DER. They should make this data available to current or potential market participants in an accessible and safe manner. CEER is planning to work with stakeholders to facilitate this work by organising a workshop in 2020. A workshop is also planned to provide a forum for exchange of learning and exchange regarding regulatory 'sandboxes'.

Additionally, CEER will continue its work on cybersecurity, flexibility, electricity distribution tariffs, stranded assets and whole system approach. Furthermore, the 7th Benchmarking Report on the Quality of Electricity and Gas Supply is planned to be published in 2020. This report is a key reference document used to assess the performance of the energy systems.

3.4. Gas and electricity market developments

CEER will consider how energy markets might be affected by new communications technologies and the resulting effect on energy trading at wholesale and end user levels.

CEER's gas and electricity sector work will be in large part related to the decarbonisation. CEER will undertake follow up work on the 2019 CEER consultation on the Regulatory Challenges for a Sustainable Sector in ways which complement initiatives by other regulatory bodies. With the development of green gases, gas distribution is playing a new role welcoming production facilities. This evolution is modifying the functioning of networks and will have to be translated within access rules and tariffs. CEER work will consist of a survey of distribution regulation in the EU with a particular view to existing arrangements regarding the injection of green gases in order to develop potential recommendations on the future role of gas from a regulatory perspective.

CEER will also explore areas where gas and electricity converge and will explore whether more effective sector coupling between electricity and gas could be achieved through greater alignment of regulation.

As part of the follow up to CEER's Future Role of Gas report, we will also engage with stakeholders in a broad discussion about the future role of LNG in Europe.

In addition, CEER will undertake preparation of the annual report on regulatory frameworks of European energy networks (earlier known as Investment Conditions Report) which surveys implemented regulatory regimes

Simultaneously, CEER plans to publish the biennial Status Review of Renewable Energy Support Schemes in 2020. While also reviewing the CEER report on tendering procedures

3.5. International work beyond the borders of the EU

CEER will continue its international relations with regulators across Europe and globally to exchange experiences and to respond to the growing interaction between the European internal energy market and its neighbouring markets. CEER has an active cooperation agreement with the Energy Community Regulatory Board (ECRB) and the Association of Mediterranean Energy Regulators (MEDREG). CEER is also an active member of the International Confederation of Energy Regulators (ICER) and participates on developing the 2021 World Forum of Energy Regulation (WFER).

3.6. Other work areas

CEER is planning to continue building stronger ties with other European regulatory bodies in disciplines related to energy regulation, including financial regulation, competition authorities and telecommunications regulation. CEER will also look at new trends in energy trading. Finally, CEER will prepare a status review on the independence of energy regulators which will include change resulting from recent legislation.

4. CEER Work Programme 2020 – Results

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Customers & Retail Markets and Distribution Systems	Consumer protection challenges in evolving energy retail markets. The impact of new products and services on regulation	CEER will prepare a case study report on innovative business models looking at examples of aggregation, peer to-peer trading and other innovative business models emerging in the energy sector and beyond. The challenges which may arise for consumer rights will be especially highlighted. The Clean Energy Package seeks to activate consumers through e.g. the right to form citizen energy communities and choose an independent aggregator. As of such, regulators will further explore how new products and services affect current regulation. Additionally, this deliverable may cover relevant topics from CEER Digitalisation Conclusions Paper. (NB: In the consultation this item was entitled: Data and Smart Metering).	Dynamic Regulation, Digitalisation	Advice or Position Paper	2020	2021
Customers & Retail Markets	Billing: contractual and customer information after the Clean Energy Package	CEER will work on billing in the context of the revised provisions in the Clean Energy Package and also crosscheck changes in billing processes and billing information with the legislative provisions in the “New Deal for Consumers” legislative package.	Dynamic Regulation	Guidelines of a good practice	Q1 2020	Q3 2020
Customers & Retail Markets	PEER Workshop on Comparison Tools - New intermediaries - dynamic price	Digitalisation allows dynamic price setting for energy to be applied to the smallest energy customers. New intermediaries emerge using digital platforms and algorithms, impacting choices by energy consumers.	Digitalisation	Workshop	Q1 2020	Q2 2020

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Customers & Retail Markets	ACER/CEER Market Monitoring Report on Consumer Empowerment Chapter. Consumer Empowerment and Protection 2009-2018. The Legacy of the 3rd Package	<p>The ACER/CEER Market Monitoring Report on Consumer Empowerment is an annual report to describe the trends in European energy markets. With the finalisation of the CEP, new legal requirements add to an already successfully established list of empowerment and protection mechanisms for European electricity and gas consumers. The report will monitor new developments providing a European perspective on national transpositions. Furthermore, the report aims to provide new detailed insights into European energy markets by exploring additional dimensions such as those identified in the CEER Roadmap to 2025 for Well-Functioning Energy Markets or by investigating more closely the relationships between consumer empowerment and retail market properties. Bundled products might also be covered in some way.</p> <p>In 2009, the Third Package – notably the Electricity and Gas Directives 2009/72/EC and 2009/73/EC – introduced a set of consumer protection and empowerment mechanisms for implementation into national energy legislation for the next decade. In 2018 (or early 2019), the 3rd Package will be succeeded by the Clean Energy For All Europeans Package in electricity, with gas following suit in the years ahead. ACER and CEER monitored the implementation of such European legislation from very early onwards. Today, they are in a position to assess progress and standstills in consumer protection and empowerment over the period 2009-2018. In this deliverable, ACER and CEER compare earlier findings with the latest available insights from the ACER-CEER Market Monitoring Reports 2018 and comments on the big and small successes of implementing consumer protection legislation in both legal and practical perspectives.</p>	Dynamic Regulation	Report	Q1 2020	Q4 2020
Customers & Retail Markets	Quo Vadis CEER-BEUC 2020 Vision? Stakeholder workshop to get feedback on the status of CEER-BEUC 2020 Vision and Quo Vadis	<p>Since the vision is “ending” it would be worthwhile to consider a prolongation in one way or the other. In 2020, CEER plans to launch a renewed reflection on delivering the principles in the Vision and will organise an event to discuss how the principles agreed in 2012 are being applied, and whether they should be reviewed in the light of the energy transition and major changes occurring (and expected) in the energy sector. What about some more intense cooperation with BEUC on a vision 2025 or 2030? What are the (old and) new challenges? What has been accomplished from the 2020 vision?</p>	Digitalisation	Deliverable	Q1 2020	Q4 2020

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Customers & Retail Markets	CEER Report on Monitoring European Retail Markets	CEER will continue to develop its activities relating to the monitoring of the performance of retail markets on the basis of CEER National Indicators. The report analyses some of the most important aspects of retail markets, allowing a more in-depth and comprehensive understanding of their performance and evolution. It will take into account the results of work on indicators and metrics from the CEER Roadmap to 2025 Well-Functioning Retail Energy Markets as well as monitoring-related developments at European level (e.g. the various volumes of the ACER-CEER Market Monitoring Reports). It will include cooperation with CEER Secretariat to improve MMR questionnaire and develop a national indicators database.	Dynamic Regulation	Report	Q1 2020	Q4 2020
Customers & Retail Markets	Status Review with a focus on the gap-analysis for the Roadmap to 2025 for Well-Functioning Retail Energy Markets	In 2020, CEER is preparing a second Status Review, building on the first report published in 2019, on the progress Member States are making towards well-functioning retail energy markets by 2025. CEER monitors and reports on the progress of these self-assessments on a yearly basis until 2025.	Dynamic Regulation	Status Review	Ongoing	Q4 2020
Distribution Systems	Network planning and coordination	Following the Clean Energy Package, a workshop should focus on how network plans may look like, including developments towards a more decentralised system and the TSO/DSO relationship.	Dynamic Regulation	Workshop	Q2 2020	Q4 2020
Distribution Systems	CEER Report about CS in the Clean Energy Package	This deliverable aims to review the Clean Energy Package and identify the relevant articles and opportunities/challenges for cybersecurity.	Digitalisation	Report	Ongoing	Q1 2020

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Distribution Systems	Workshop on data accessibility	The CEER Digitalisation Paper prioritises that DSOs should focus on the quality of their network data and data on DER. They should make this data available to current or potential market participants in an accessible and safe manner. Data must be interoperable. The aim of this CEER deliverable is to learn from those who move first in this area, e.g. developing digital twins), therefore, CEER should work with stakeholders to facilitate this work by organising a workshop in 2020.	Digitalisation	Workshop	Q1 2020	Q4 2020
Distribution Systems	Workshop on best practice “sandboxes”	The CEER Digitalisation Paper proposed for regulators develop best practice approaches to enable “sandboxes”. CEER should provide a forum for exchange of learning and feed back into the parameters for new trials.	Digitalisation	Workshop	Q3 2020	2021
Distribution Systems	7th Benchmarking Report on Quality of Electricity and Gas Supply	Periodic full update of the Benchmarking Report on the Quality of Electricity and Gas Supply. The report is a key reference document used to assess the performance of the energy systems.	Dynamic Regulation	Benchmarking Report	Ongoing	Q4 2020

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Electricity	Regulatory Frameworks Report of European Energy Networks	This CEER annual report was, previously known as the Investment Conditions Report, delivers a general survey about the implemented regulatory regimes, the demanded efficiency developments and analyses the overall determination of capital costs. In 2019, it will be the 8th edition of the report. The investment conditions report was for the first time made available to public in 2016.	Dynamic regulation	Report	Q1 2020	Q4 2020
Electricity	Biennial RES Status Review of Renewable Support Schemes in Europe	This CEER document will form the latest update to the regular biennial CEER Status Review of Renewable Energy Support Schemes in Europe. These documents collect comparable data on RES support in Europe (e.g. by technology and support type). This deliverable will include a questionnaire for NRAs.	Decarbonisation	Status Review	Q1 2020	Q4 2020
Electricity	Update on CEER Report on Tendering Procedures for RES in Europe	This CEER report focuses on RES tendering procedures as it is one of the significant changes introduced for RES support in the EU. Tendering procedures are instruments to determine the financial level of support for electricity sourced by RES. Particularly following the Clean Energy Package, Member States are urged to opt for market based mechanisms. This report aims to present an updated overview of the key design elements of RES tendering procedures applied in most European countries. This deliverable will include a short questionnaire for NRAs.	Decarbonisation	Report	Q1 2020	Q2 2020

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Gas	The future role of LNG in Europe	The LNG WS will engage, internally and with other stakeholders (mainly GLE, Eurogas, EFET), in a broader discussion about the future role of LNG in Europe. CEER will analyse the suitability of the regulatory framework in the context of an evolving LNG market, the implications of the competition between LNG terminals, with different regulatory regimes, the possible LNG market opportunities and threats, or the need for further coordination/cooperation among NRAs. The LNG WS will also be actively involved in any study or regulatory development related to LNG, in particular in the gas package revision and in the EC study on LNG.	Decarbonisation & Dynamic Regulation	Workshop	Q1 2020	Ongoing
Gas	Gas Distribution Access and Tariffs	With the development of green gases, gas distribution is playing a new role welcoming production facilities. This evolution is modifying the functioning of networks and will have to be translated within access rules and tariffs. The work will consist of a survey of distribution regulation in the EU with a particular view to existing arrangements regarding the injection of synthetic gases (including hydrogen). It will allow to compare the different orientations chosen and draw potential recommendations in coherence with the activities carried out on the future role of gas in a regulatory perspective.	Decarbonisation & Dynamic Regulation	Report	Q1 2020	Q4 2020
Gas	Regulatory Innovations for Electricity and Gas Sectors Coupling	CEER will explore which areas that would benefit from greater alignment/consistency towards an effective sector coupling between electricity and gas. Gas and electricity can converge on specific services for example energy storage and transmission in an innovative way where one could substitute to the other. The purpose is to investigate areas of convergence and associated regulatory challenges. This activity is aimed to follow developments on gas sector discussions and identify an electricity perspective as well, particularly on P2X. To contribute to "realistic" assumptions and to a coherent debate on an appropriate regulatory framework. The importance is to bring the electricity view to the discussion and contribute to solutions for the creation of a useful regulatory framework.	Dynamic Regulation	Report	Q1 2020	Q4 2020

Sector	Title	Description	3D Strategy	Deliverable / Activity	Expected start time	Expected end time
Market Integrity & Transparency	Monitoring technological trends in energy trading	The purpose of this deliverable is to assess the extent to which new technologies are already reshaping, or might reshape in the near future, wholesale energy trading. Indeed, algorithmic or high frequency trading is already a reality in financial trading and has triggered regulatory action from financial regulators. Also, and high frequency trading can also already be encountered in energy trading and NRAs with MPs and stakeholders should engage in discussions about the right way to monitor such trading, in particular from the REMIT obligations point of view. Moreover, recent developments in blockchain may enable in the near future new forms of peer-to-peer trading and the proposed deliverable and associated workshop may also give the opportunity to analyse the status quo and address the upcoming regulatory challenges of these technologies.	Digitalisation	Activity	Q1 2020	Q4 2020
Regulatory Benchmarking	CEER Monitoring report on NRAs independence	This deliverable will allow us to provide a status review after 3 years. National legislators have adapted the NRAs competences, tasks and duties status in implementing CEP. This report will be used to provide input to the Commission.	Dynamic Regulation	Status Review	Q1 2020	Q4 2020
CEER Secretariat	CEER Customer Conference	Every year since 2012, CEER organises this event, with the support of the EC, which serves as a forum for consumers, industry and policy makers to discuss EU policy issues related to customers' protection and empowerment. For the purposes of this conference, the list of CRM WG contacts at national and EU level will be updated on an annual basis.	Dynamic Regulation	Conference	Q1 2020	Q1 2020
Work Programme Drafting Committee	Work Programme 2021	Establish CEER Internal and Public Work Programme 2021	Digitalisation, Decarbonisation & Dynamic Regulation	Document	Q1 2020	Q4 2020