Annual Report

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# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Setting the Scene: Stimulate Regional Integration</td>
<td>8</td>
</tr>
<tr>
<td>2. Facilitate Infrastructure Investment</td>
<td>12</td>
</tr>
<tr>
<td>3. Increase Competition and Transparency</td>
<td>16</td>
</tr>
<tr>
<td>4. Innovate RES Technologies</td>
<td>20</td>
</tr>
<tr>
<td>5. Design Consumer Protection Standards</td>
<td>24</td>
</tr>
<tr>
<td>6. Build Regulatory Capacity in the Region</td>
<td>28</td>
</tr>
<tr>
<td>7. Intensify Cooperation with Stakeholders</td>
<td>32</td>
</tr>
<tr>
<td>8. Communication and Outreach</td>
<td>36</td>
</tr>
<tr>
<td>9. Advocacy and Visibility</td>
<td>38</td>
</tr>
<tr>
<td>Annexes Reports</td>
<td>41</td>
</tr>
<tr>
<td>Medreg’s Governance</td>
<td>42</td>
</tr>
<tr>
<td>Secretariat</td>
<td>45</td>
</tr>
<tr>
<td>Members</td>
<td>46</td>
</tr>
</tbody>
</table>
**OUR MISSION:**
MEDREG aims to set the conditions for the establishment of a future Mediterranean Energy Community.

**OUR OBJECTIVE:**
MEDREG’s main objective is to provide a level playing field for all Mediterranean energy actors by encouraging and facilitating the establishment of a sound legal and regulatory framework. Based on independent and objective regulatory bodies, energy markets are more likely to attract investment, ensure efficient use of the system and of investments and encourage fair practices towards consumers.

In this context, Mediterranean energy regulators have been working together to:

1. **Stimulate regional integration and energy trading between Mediterranean countries**
MEDREG assists its members in their regulatory reforms through tailor-made activities with a view to facilitate and enhance interconnections and the development of harmonised and converging regulatory frameworks.

2. **Analyze and improve conditions for infrastructure investments**
The organisation identifies priorities and challenges for the stimulation of relevant investments in the Mediterranean region, advocating for an innovative approach that takes into account national energy developments and peculiarities in the regional context.

3. **Increase competition and transparency in the Mediterranean electricity and gas markets**
MEDREG addresses the “information asymmetry” between regulators and market actors as well as supports its members in identifying main discrepancies that would distort competition and transparency.

4. **Promote Renewable Energy Sources (RES) and innovate in RES technology**
The Association constantly seeks to support its members in implementing regulatory measures to foster the integration of renewable energy sources into their national energy mix and supports technologies that would enhance the deployment of RES into the system.

5. **Raise awareness of consumer rights**
MEDREG works to spread and disseminate awareness regarding the important role that consumers play as beneficiaries and contributors towards the establishment of sustainable energy markets in the region.

**MEDREG**
MEDREG stands for the Association of Mediterranean Energy Regulators and gathers 27 energy regulators from 22 countries, spanning the European Union (EU), the Balkans and the MENA region. Albania, Algeria, Bosnia-Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Libya, Malta, Montenegro, Morocco, Palestinian Authority, Portugal, Slovenia, Spain, Tunisia and Turkey are already members of MEDREG.

MEDREG works to facilitate and develop approaches and practices that are coherent at the regional level for energy market regulation in the Mediterranean region. Based on a bottom-up approach, MEDREG acts as a collaborative platform for regulators from the northern and southern shore of the Mediterranean to exchange technical knowledge and good practices while supporting each other to reinforce their regulatory capacities.

The Association is co-funded by the European Union and benefits from the financial contribution of its members.
The Mediterranean and Friends,
There are many different titles for the Mediterranean: "the sea around us", "our sea", "the sea in the middle of land", "the sea between continents", etc. There are many different titles for the Mediterranean: "the only liquid continent". It may indeed be said that "ours", "ours", "the sea in the middle of land", "the sea between continents", etc. "the only liquid continent". It may indeed be said that "ours", "ours", "the sea in the middle of land", "the sea between continents", etc. It may indeed be said that "ours", "ours", "the sea in the middle of land", "the sea between continents", etc.

Having been witness to how the Mediterranean has been taking up more space in energy-related news in recent years because of new hydrocarbon discoveries, forecasted high demand growth especially in the southern shore, and as a result of the rising importance of trade and transport routes. We, the energy regulators of the Mediterranean, and our association, MEDREG, aim to make use of energy for trade and prosperity and are working hard to achieve all this while keeping all the aforementioned features of the Mediterranean in mind.

MEDREG concluded several studies, such as on the Monitoring of Compliance with the Guidelines of Good Practice on Third Party Access for Gas in MEDREG countries, the Establishment of MEDREG Guidelines of Good Practice on Capacity Allocation, a Joint Report on Complaint Handling, Dispute Settlement and Consumer Awareness, Smart Grids in the Mediterranean Countries, Regulatory Options for Stimulation Investments, and a Peer Review to Jordanian Regulatory EMRC on Electricity Licensing Procedures. You can find details of these studies in this Annual Report and on our website. You can also find details of MEDREG’s increasing partnerships with regional regulatory authorities and, in particular, MEDREG’s role in the US Energy Platforms process in this Report.

I would like to sincerely thank our members, our Secretariat, former President Mr. Alexander Santos, and his presidency team for their contribution. I would also like to thank our stakeholders and, in particular, the European Commission for its explicit acknowledgment of MEDREG as one of the key institutions ensuring regional cooperation in the energy sector and, accordingly, for supporting MEDREG through a grant contract.

Last but not the least, I salute our new members, the Lebanon Centre for Energy Conservation and Monaco Electricity Regulatory Authority (ANRE), while hoping to finalize Mauritania’s adherence.

To conclude, I once again underline that MEDREG will continue to contribute to the Mediterranean energy with more dedicated work and increased inclusiveness.

Kind regards,

Gülşen Demirbaş
MEDREG President

MESSAGE FROM THE PRESIDENT

President Mr. Alexander Santos,
I would like to sincerely thank our members, our Secretariat, former President Mr. Alexander Santos, and his presidency team for their contribution. I would also like to thank our stakeholders and, in particular, the European Commission for its explicit acknowledgment of MEDREG as one of the key institutions ensuring regional cooperation in the energy sector and, accordingly, for supporting MEDREG through a grant contract.

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Kind regards,

Gülşen Demirbaş
MEDREG President

Dear Mediterranean Friends,
There are many different titles for the Mediterranean: "the sea around us", "our sea", "the sea in the middle of land", "white middle sea" and so on. Moreover, the Mediterranean is known as the "only liquid continent". It may indeed be referred to as a continent because the Mediterranean in itself is a harmony of civilisations; it intertwines cultures and history.

We have been witnessing how the Mediterranean has been taking up more space in energy-related news in recent years because of new hydrocarbon discoveries, forecasted high demand growth especially in the southern shore, and as a result of the rising importance of trade and transport routes. We, the energy regulators of the Mediterranean, and our association, MEDREG, aim to make use of energy for trade and prosperity and are working hard to achieve all this while keeping all the aforementioned features of the Mediterranean in mind.

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Kind regards,

Gülşen Demirbaş
MEDREG President

Chers amis méditerranéens,
Il y a beaucoup de noms différents pour le Méditerranée : « la mer autour de nous », « notre mer », « la mer au milieu de la terre », « la mer blanche du milieu ». En outre, la Méditerranée est connue comme le « seul continent liquide ». On peut en effet l’appeler un continent parce que le Méditerranée est en soi un harmonie de civilisations ; elle entretient cultures et histoires.

Ces dernières années, la Méditerranée a pris de plus en plus de place dans l’activité énergétique en raison de nouvelles découvertes d’énergie, de l’importance croissante du commerce et des voies de transport. Nous, les régulateurs de l’énergie de la Méditerranée et notre association, MEDREG, voulons utiliser l’énergie pour la paix et la prospérité et travailler davantage pour y parvenir, tout en gardant à l’esprit toutes les caractéristiques de la Méditerranée mentionnées plus haut.

Acheté être membre de MEDREG pendant plus de 10 ans et en tant que première femme présidente, je peux dire avec fierté que MEDREG est l’un des acteurs les plus importants et sérieux de la communauté énergétique méditerranéenne. En luttant visant à renforcer la stabilité réglementaire et à contribuer à la prospérité socio-économique en Méditerranée est unanimement reconnu par les régulateurs membres ainsi que par les parties prenantes. Grâce aux activités conjointes de ses membres, MEDREG présente une valeur ajoutée dans la réalisation de marchés de l’électricité et de gaz équitables, transparents, durables, prévisibles et internationaux ainsi que d’un marché commun méditerranéen de l’énergie. À cette fin, l’année dernière, MEDREG a mené à bien plusieurs études - le Système des lignes électriques de frontières sur l’accès à l’électricité pour les pays dans le sud du MEDREG, l’Établissement de lignes directrices MEDREG sur l’allocation des capacités, un Rapport conjoint sur le traitement des réclamations, le Règlement des différends et la sensibilisation des consommateurs, le Réseau intelligent des pays méditerranéens, des Options réglementaires pour stimuler les investissements et un Examen sur le pourcentage des procédures de discrimination des transactions énergétiques par ENR, qui a été présenté aux autorités pour raisons évidentes. Vous trouverez le détail de ces études dans le présent Rapport Annuel et sur notre site Web. Vous trouverez également dans ce Rapport des informations sur les partenariats croissants de MEDREG avec les autorités régionales de régulation et, en particulier, sur le rôle de MEDREG dans le processus des plateformes énergétiques de l’UE.

Je voudrais remercier sincèrement mes membres, notre Secrétariat, l’ancien président Mr. Alexander Santos et ses équipes de prise de participation pour leur contribution, je voudrais également remercier nos partenaires privés et, en particulier, la Commission européenne pour sa reconnaissance explicite de MEDREG comme l’un des institutions clés qui assure la coopération régionale dans le secteur de l’énergie et, par conséquent, pour avoir soutenu MEDREG dans le cadre du contrat de subvention. Enfin, et surtout, je remercie nos membres, le Comité pour les économies d’énergie et l’Autorité marocaine de régulation de l’électricité (ANRE), tout en espérant réaliser l’ambition de la Marrakech.

Pour conclure, je souhaite souligner une fois de plus que MEDREG continuera à contribuer à l’énergie méditerranéenne par un travail plus divisé et une dimension plus inclusive.

Confidentiel,
Gülşen Demirbaş
Présidente de MEDREG
Energy in Southern Mediterranean countries is a challenge as well as a great opportunity; energy demand in the region is growing rapidly along with significant energy production potential. Regulation is the key instrument to drive the change and to support Mediterranean Southern countries to face their needs for substantial investments to build generation plants based on modern technologies, develop transmission and distribution grids and ensure security of supply.

The political agenda of the Mediterranean region has been reshaped by various events surrounding climate change, migration crises, swinging oil reserves and prices, the potential impact of the shale gas revolution, unstable financial markets and social and political unrest.

The growing complexity of the actors and layers involved calls for the existing institutions supporting the development of the Mediterranean region to play a new and impactful role.

The experiences of successful energy market reforms have demonstrated the need for the development of sophisticated and comprehensive regulatory tools, managed by independent entities.
Coherently with this approach, MEDREG is committed to the progressive harmonisation and liberalisation of the electricity and gas markets of the Mediterranean region. As stated in its 2020–2030 Strategy, MEDREG aims to promote the creation of independent regulators with clear powers and competences in each Mediterranean country. MEDREG also supports the improvement of national legal and regulatory frameworks as well as the emergence of regional standards based on a common understanding shared by all energy actors in the region.

To this end, MEDREG uses flexible and adaptable tools that must be constantly updated in accordance with the changing needs of the region. Indeed, requests for support from MEDREG members, notably those from the southern shore, are increasing and becoming more diversified. MEDREG has noted such needs and adopted a more comprehensive and effective approach to address them and to support national reforms in its member regulators’ countries.

At the heart of MEDREG’s goals lies contributing towards the establishment and functioning of an integrated Mediterranean energy market. MEDREG’s mixed membership allows regulatory authorities/ministries from the North, South and Eastern Mediterranean shores to exchange experiences and good practices regarding a wide set of regulatory issues, ranging from network tariff methodologies to congestion management rules to investments and interconnections. MEDREG’s activities are interconnected in order to provide members with different points of view and tools on the same subject. Support activities can take several forms, including information exchange, high-level training for regulatory staff and identification and discussion of new regulatory measures. The novelty and added value of these activities lie in the tailor-made and personalised aspect of the support offered to the beneficiaries.

The support to a member regulator is identified through a structured process. This process includes (a) mapping of projects pertaining to national energy markets and their regulation and (b) identification of current (or forthcoming) national reforms. Subsequently, questionnaires and interviews with energy regulators are developed to identify needs and requirements. Then more direct contacts and visits to targeted countries may take place to further understand their needs. Finally, tailor-made and detailed implementation support plans are developed and carried out.

In 2018, MEDREG focused on supporting some of its members in the development of their gas markets and the integration of RES in the grids. The reasons behind these choices and their impact on the beneficiary countries will be explored in this Annual Report.

In order to ensure as much exposure and visibility as possible for the outcome of these efforts, MEDREG has an overarching communication policy to publicise its activities – publishing its reports on its website, disseminating information newsletters, social media as well as presenting its views and recommendations at international events and fora. Furthermore, the MEDREG regulatory papers and studies serve as a basis for engagement within the membership and the messages are reiterated and promoted in regulatory trainings/workshops and technical assistance projects. This widespread dissemination helps multiply the impact and value of the recommendations developed by the regulators through MEDREG, aimed at our members and at other relevant energy sector actors and policy-makers.
WHAT IT IS ABOUT

While market design and the level of development of electricity markets make it possible to evaluate and plan investments for interconnection projects according to wholesale prices in the EU, in the wider Mediterranean region, such an approach is much more difficult due to the lack of harmonisation of system operation and efficient cross-border integration. In addition, the geographical distribution of population around the seashore, the lack of reserve margins on the generation side and the sustained increase of electricity consumption make it even more complex to develop a harmonised approach to network development.

WHAT WE DID

In the report titled “Regulatory options for the stimulation of infrastructure investments – Fact finding and review of challenges”, MEDREG assessed the level of development of power systems and identified priorities and challenges for the stimulation of relevant investments in the Mediterranean region. This diversity of situations requires the adoption of a different approach based on the analysis of national and regional circumstances and energy market characteristics when it comes to assessing investment needs in the Southern Mediterranean countries.

PERCENTAGE OF ELECTRICITY IMPORTS ON DOMESTIC ELECTRICITY CONSUMPTION IN 2015, 2016 AND 2017 IN SOUTHERN AND EASTERN MEDITERRANEAN COUNTRIES

- Algeria
- Egypt
- Jordan
- Israel
- Lebanon
- Libya
- Morocco
- Tunisia

Domestic Electricity Consumption TWh

% Import on Domestic Electricity Consumption TWh
MEDREG suggests that an efficient approach to system development requires:

- A clear national strategy;
- A coherent description of the system and its insertion within the energy mix and
- A careful reflection on the level of vertical coordination along the electricity chain.

Participating in a public consultation on the EBRD’s five-year (2019–2023) Energy Strategy in Barcelona, MEDREG shared its view on the future of the sector and the role of International Financial Institutions (IFIs). MEDREG called on IFIs not only to support interconnection investment linking the North and the South but also for infrastructure connecting Southern Mediterranean countries amongst themselves. MEDREG further drew attention to the fact that when investing in some Mediterranean countries, they should require governments to involve regulators in the evaluation of infrastructure projects.

WHY IT MATTERS

In a region where energy poverty continues to be an issue, electricity investment matters because it allows improving the quality and stability of the energy supply and supports energy transition towards greener energy sources. Studying the setbacks and evolution indicates the importance of establishing a clear institutional architecture at a national level, as investment demands stable rules and understandable business conditions. Examining where energy investment thrived and failed also demonstrates that countries should be able to plan ahead and design the evolution of their energy systems for the years to come. The linkage between positive development of investment and benefits for consumers is represented by the regulators who set the rules, monitor them and correct market imbalances. This is why having independent regulators is so important for an energy system in order to answer the needs of the market.

In order to stimulate investment, MEDREG impels its members to:

- Clarify the institutional architecture at national level;
- Improve investment planning capacity;
- Ensure a proper level of transparency and know-how; and
- Build upon regulators’ competences.

In addition, the assessment of national situations carried out by MEDREG members indicates that a more integrated energy market would increase the energy efficiency, reduce the electricity environmental footprint and would primary benefit the customers and citizens.

LOOKING FORWARD

1. **Investment and interconnections report**: This will be a follow-up of the 2018 investment report and will provide recommendations and lessons to be incorporated in the work performed under the Union for the Mediterranean Platform on the Regional Electricity Market (REM).

2. **Power losses report**: It will aim to support the CUS WG on the survey on regulatory practices on handling technical and non-technical losses of electricity.

3. **Mediterranean Electricity Market Observatory**: Based on the changing nature of the data included in this report, the structure of the study will be revised to make sure it matches MEDREG’s members’ expectations and needs.

4. **Quality of electricity supply**: A concept paper will be developed and will focus on ways to stabilise power supply quality based on experience sharing (products, level of standardisation).

5. **Cooperation with Med-TSO**: It will focus on investment (Mediterranean Projects of Common Interest), regulatory harmonisation (sub-regions) and joint training on “Regulating infrastructure investment - Planning and feasibility, network integration and incentives”.

Benoit Esnault, Electricity Working Group Co-Chair (CRE, France)
INCREASE COMPETITION AND TRANSPARENCY

WHAT IT IS ABOUT

Energy regulators are in charge of ensuring transparency in their national system in order to create efficient, integrated and competitive energy markets. Transparency is not only critical for creating a level playing field between market participants and avoiding the scope for market power to be abused, but it also helps others to understand the regulator’s work in the regulatory process and encourages proactive stakeholder engagement. In this context, the transparency is interconnected with the concept of accountability which means that the regulator takes on the responsibility and is able to demonstrate outcomes and results from its regulatory action.

WHAT WE DID

In 2018 we performed several activities to tackle the gaps limiting the establishment of a satisfactory level of competition and transparency in the Mediterranean energy markets. Some of them targeted specific countries or topics, while others promoted an exchange of best practices implemented at regional level.

For instance, we helped the Jordanian regulator EMRC through a peer review to issue and manage licensing procedures applied for generation, transmission and distribution. The report analysed EMRC according to the six good regulatory principles of MEDREG (independence, competences, enforcement, internal organisation, transparency and accountability) and issued recommendations to be implemented by the Jordanian regulator on a voluntary basis to better carry out the implementation of electricity licensing procedures in Jordan.

Two additional ad-hoc country activities were developed for the newly established Egyptian gas regulator GasReg. Firstly, we set up a study visit between GasReg and the Portuguese regulator ERSE on the “Liberalisation of the gas market, focusing on eligibility criteria” to discuss the eligibility of consumers, the opportunities to align market liberalisation with price reform and the handling of legacy contracts in the gas market liberalisation process.

Secondly, the third gas workshop on “Supporting the newly established Egyptian gas regulator authority: challenges and way forward” identified the main objectives still to be achieved by GasReg to properly carry out its role of regulator as well as the latest developments of the regulatory framework in Egypt.

The regional exchange of best practices involved the drafting of two reports that promote transparent and competitive markets in the Mediterranean region.

The report “Monitoring of compliance with the Guidelines of Good Practice (GGP) on Third Party Access (TPA) for gas in MEDREG countries” provides the state-of-play for 2018 on the application of TPA in the Mediterranean region, based on the set of recommendations developed by MEDREG in 2014 for its members. Overall, MEDREG countries seem to be slowly but steadily closing their regulatory gaps in terms of TPA, albeit some difference remains, notably concerning the issuing of transparent rules and the development of anti-hoarding mechanisms.

Lastly, MEDREG elaborated some Guidelines of Good Practice on Capacity Allocation, describing the most efficient allocation mechanisms of capacity at interconnection points. These guidelines, accompanied by recommendations on the harmonisation of the rules at interconnection points in Mediterranean countries, are meant to foster the development of cross-border trade and encourage efficient use of infrastructure and a competitive gas wholesale market in the Mediterranean region.

WHY IT MATTERS

Information asymmetry between regulators/public authorities and market players can represent an obstacle for transparent, competitive and efficient energy markets. Transparency and access to information are indeed essential to provide a level playing field in the market. This requires regulation which sets clear rules and obligations on all parties, as well as a regulatory framework which guarantees the ability and powers for regulators to supervise the performance of these actors.

To this aim, regulators may implement different tools to engage stakeholders in different stages of the regulatory decision making process, supporting a fact based regulation which gathers opinions, data and technical expertise on the performance and behavior of the market actors as well as monitoring them regularly. Much of this information is held by the actors themselves, thus necessitating legislation and the granting of authority to the regulatory bodies to request information on a range of indicators, including factors linked to generation, networks, wholesale market, retail markets and consumer protection.

Finally, stakeholders and other public bodies too may have the possibility to monitor regulators activities, considering the impact regulation may
GASREG and MEDREG have established a strong and valuable relationship that started in 2016 with Egypt’s initiative to adopt a regulation for its gas market. The effective cooperation and extensive engagement of GASREG in MEDREG’s activities have been significantly contributing to the progress of setting up of GASREG.

The exchange of knowledge and sharing of experiences facilitated by MEDREG’s study visits to fellow Mediterranean regulators have been revealed to be extremely valuable in equipping GASREG with the practical know-how to sustain its role in the newly established gas market in Egypt.

Eng. Karem Mahmoud
Gas Working Group Chair
Executive Chairman
(GASREG, Egypt)

have in the energy sector. Therefore, regulators may be invited to refer about their main activities and results, not only if required by legislation but even in front of stakeholders thus enhancing their accountability.

**LOOKING FORWARD**

1. **Good Practice on Gas Transparency in MEDREG countries**: It will develop monitoring compliance with the Guidelines of Good Practice (GGP) on transparency for gas in MEDREG countries.

2. **Workshop for the Jordanian regulator EMRC**: The workshop will be built on the results of the 2018 peer review to provide concrete roadmap to Jordan on how to improve its electricity licensing procedures, namely obtaining correct data from licensed operators and sanctioning powers and revision of licenses.

3. **Workshop for the Algerian regulator CREG**: The workshop will be based on the establishment of a methodology for setting the terms and conditions for financing, definition and identification of public service obligations for electricity and gas.

4. **Seminar for the Israeli regulator PUA**: The seminar will be designed on market rules, market structures and legal and regulatory institutions that are necessary to establish a competitive wholesale market.

5. **Training for the Egyptian Gas Regulator**: The training will be programmed on the regulatory tools necessary to monitor the Egyptian gas market, particularly the transmission and distribution sector, based on the competences given to the newly established regulator.

**APPLICATION OF THIRD PARTY ACCESS (TPA) IN MEDREG COUNTRIES**

- Countries which implemented TPA rules on access to gas transmission, distribution and LNG import terminals: 57%
- Countries with functional unbundling of the regulator and with the power to set a regulatory framework for TPA: 76%
- Countries with transparent TPA rules: 57%
- Countries with a timetable for gradual market opening and national rules to facilitate the entrance of new suppliers: 51%
The development of renewable energy sources and the objective of reducing CO2 emissions are the two factors driving important evolutions in the energy sector. Technological improvements have supported a strong improvement in renewable energies’ competitiveness and new options for demand side management have also emerged. At the same time, the deployment of the Internet and information technology offers new potentials for developing smart solutions to energy supply problems; digitalization is expected to bring great benefits in the future. Regulation can accelerate the emergence of innovative low-carbon technologies and act as a spur for greater competitiveness, facilitating the development and integration of renewable energy sources in Mediterranean energy markets.

In this regard, MEDREG assisted the Palestinian regulator PERC in evaluating the possibility to establish a net metering system in the country through a report that describes the role of net metering in electricity grids, presents several international experiences and analyses the legal and technical situation of Palestine in relation to net metering application. The technical and economic impact that net metering could have on the national grid is envisaged. Finally, it provides recommendations on the regulatory, economic procedural, technical and capacity development steps to be taken in order to implement net metering in Palestine. Furthermore, the integration of variable renewable energy into the electricity grids has led to the adoption of renewable incentive public policies. Among these policies, auction schemes have become increasingly popular in the Mediterranean region.

In particular, Algeria has started implementing its new strategy for renewable energy development, including introducing tenders as a method to determine their renewable energy selling price. In this framework, the Algerian regulator CREG is contributing to the process of validating renewable energy selling prices resulting from investors’ response to tenders and from auctions, launching an auction with 150 MW of PV. To support the Algerian regulator in this process, MEDREG organised a technical workshop involving experts from organisations at the forefront of the analysis of renewable energy auctions. Taking into account the Algerian legislative framework, the workshop looked at how to include stakeholders’ view in the design of auctions, define appropriate requirements to participate in the auction and select a winner that effectively implements the project.
WHY IT MATTERS

The growing variety of different applications of renewable energy in the Mediterranean requires regulators and policy-makers to further develop their dialogue and exchange to ensure that green national plans are compatible with market rules and sustainable in the long run. In addition, the penetration of renewable energy sources and the promotion of energy efficiency can contribute to the security of energy supply and the overall efforts to combat climate change. To this aim, regulators must implement regulatory frameworks that provide solutions enabling the development of innovative technologies capable of facilitating the deployment of renewable energy sources. With this in mind, MEDREG developed a report on “Smart Grids in the Mediterranean region” which provided a first overview of the implementation of smart grid technologies in the region.

The future of renewable energy sources will indeed depend on the capacity of regulators to shape their national regulatory frameworks in friendly and stable environments where market players can operate with the certainty of rules, improving favourable conditions for investments in green technologies.

“Thanks to experiences of RES auction systems implemented in various developing regions of the world, shared in the MEDREG support framework, we gained a clear idea on the priorities to take into consideration in order to evaluate and endorse the fairest and most economical viable RES electricity prices in Algeria.”

Mr. Hichem Rimouche, Tariff Director (CREG, Algeria)

LOOKING FORWARD

1 MEDREG-ECRB joint workshop on RES auctions mechanisms: It will analyse the regulatory options to promote the development of renewable energy sources in the national energy mix, discussing the different auction mechanisms currently used in MEDREG countries.

2 Forum on Mediterranean Energy Regulation: It will assess the role MEDREG can play in the region, taking into account the rapid changes taking place in Mediterranean gas and electricity markets and the impact these have on new regulations. In particular, it will zoom in the current regulatory evolutions following the Eastern Mediterranean gas discoveries and the potentialities of RES deployment in the Southern shore countries, identifying main regulatory challenges as well as potential solutions to be taken at the regional and sub-regional level.

3 Analysis of auction mechanisms to promote RES in the Mediterranean region: It will analyse different auction mechanisms currently applied in the Mediterranean region.
WHAT IT IS ABOUT

Safeguarding consumer rights and designing consumer protection standards lie at the heart of the tasks of Mediterranean energy regulators, as informed and active consumers are an essential condition for efficient and sustainable energy markets. Despite many attempts for improvement, energy consumers are not yet able to access affordable energy and do not have the possibility of being actual prosumers all across the Mediterranean region. Therefore, MEDREG is working to put the interests of Mediterranean energy consumers at the centre of its activities, promoting customer empowerment and spreading best practices and awareness on the important role that consumers play, as beneficiaries and contributors to the energy market.

WHAT WE DID

In 2018, the Association focused on the promotion of consumer empowerment and best regulatory practices to protect consumers in the region. Along with the Energy Community Regulatory Board (ECRB), MEDREG issued a report mapping out the current status and nature of complaint handling, dispute settlement and consumer awareness in Eastern Europe and Mediterranean countries. The survey revealed the following facts:

- Billing and metering issues are the most common areas in which complaints are received.
- Energy consumer protection policies are in place.
- Regulators are usually responsible for reviewing complaints and resolving disputes.
- Regulators have access to complaint-related data.
- The energy service provider informs the customers about the price connection, disconnection rules and bill payments dispute rules.
- Regulators must address complaints within specific periods, ensuring that customers receive redress or treatment for their complaint within an appropriate timeframe.
- Consumers are informed about their right to complain via contracts, websites and leaflets.
- Various communication means are available, such as messaging apps and social media.
- Consumers raise complaints through the supplier before turning to the regulator.
- The final settlement determined by the regulator or reached by the parties is binding and, in the case of a regulatory decision, is subject to fines and enforcement if the service provider does not comply with the decision.
Beyond that, in 2018, MEDREG also targeted specific country needs on consumer issues. For instance, it organised a study visit for the Israeli Gas Regulator (NGA) to the Spanish regulator CNMC and the Turkish regulator EMRA to exchange views and knowledge, particularly on household gas consumer rights and connection procedures in view of the Israeli ongoing distribution tenders. The Spanish regulator CNMC addressed the concrete management of household gas consumers and presented the procedures currently applied in Spain concerning switching suppliers, bills, collection of data consumption, contracts and other consumer’s tools to identify the best gas supplier option as a way to inspire its Israeli fellow. In addition, the Turkish regulator EMRA presented its new natural gas market structure as well as its liberalisation process to NGA, describing the new distribution tenders and each step of the procedures, starting from formation of the tender commission to licensing.

The study visit saw constructive exchanges between the three MEDREG regulators, and NGA highlighted the invaluable support provided by the activity for implementing their ongoing tenders. The Israeli gas regulator also expressed its interest in benefiting from further capacity building activities of this kind in the future, building on this first successful activity.

**WHY IT MATTERS**

The increasing digitalisation and innovation in the energy sector is placing consumers at the centre of the energy transition. The process of digitalisation increases the complexity and quantity of data that should be collected from the electricity chain, questioning the current protocols for consumer protection as well as the tools to prevent market manipulation. If on one hand, final consumers can be more aware of their consumption paths, on the other, the growing availability of data tests the capacity of regulators to ensure data protection and prevent market abuse by market players. The latter collect consumer data and could easily understand consumer behaviours and try to use them to gain market shares.

As a matter of fact, energy transition raises numerous questions about the true potential to deliver real benefits to consumers as well as the risks related to privacy and cost increases. Strong actions by legislators and regulators are therefore required so that consumers can finally reap the benefits of opening up the market. These benefits could translate into downward pressure on prices and better services due to competing suppliers as well as guaranteeing actual consumer protection, especially for more vulnerable consumers.

**LOOKING FORWARD**

1. **Trilateral workshop CEER-ECRB-MEDREG:** It will present the most recent and relevant reports delivered by the MEDREG Consumer Working Group, notably the joint MEDREG-ECRB report on “Complaint handling and dispute settlement procedures available to household customers”.

2. **Regulatory Practices on Handling Technical and Non-Technical Losses of Electricity:** The study will provide a comprehensive understanding on how power losses and their management (or lack thereof) are faced in the Mediterranean countries as electricity networks are subject to power losses stemming from a range of technical or commercial situations.

“Thanks to MEDREG’s support, we exposed ourselves to both the mature market of Spain and the newly established and flourishing market of Turkey. It has been a very important experience for the Israeli natural gas industry, which is now entering into the stage of natural gas penetration to the residential sector. There are very few countries that possess a developed natural gas regulation and similar climatic conditions to those of Israel, so the chance MEDREG provided us to have long and fruitful workshops with the regulators of Spain and Turkey was extremely valuable.”

Mr. Constantine Blyuz,
Chief Economist (NGA, Israel)
Training activities are one of MEDREG’s main tools to promote the exchange of know-how and expertise among Mediterranean regulators. These courses constitute key elements to create and share a common approach towards energy regulation in the region.

To this aim, MEDREG applies a holistic approach to training activities: it addresses the needs of the diverse functions and expertise levels of Mediterranean regulators’ staff and offers references to practical decision-making cases that can provide insights into the successes and challenges of fellow regulators. The exchange of good regulatory practices among countries retains regulators’ experiences at the centre of MEDREG’s training sessions, ensuring a cooperative atmosphere of peer-learning as well as a concrete transfer of knowledge between members. In addition, MEDREG also involves academic experts, international institutions and energy industry professionals that can enrich and question regulators’ perspectives.

In 2018, MEDREG organised two training sessions, namely on “Setting of Tariffs” and “Electricity Market Monitoring Tools”. The first one focused on the fundamentals of gas and electricity tariff design and its relation with the overall functioning of the energy markets, introducing participants to several issues surrounding ratemaking both under liberalised and traditional markets. The second one, jointly organised with the Energy Regulation Regional Association (ERRA), was designed for experts familiar with wholesale and retail markets monitoring in the electricity sector. The course provided the relevant tools to better understand market power and the role that regulators can play in contrasting it.

The evaluation and satisfactory surveys administered at the end of each course revealed that the trainings represented a fundamental instrument to upgrade the knowledge of MEDREG members regarding their daily tasks in the regulator.

In the first, of 19 participants, 35% evaluated the training class as excellent, 6% as good/excellent while 59% assessed it as good. In addition, 76% of participants stated that they would be “very likely” to attend another MEDREG training in the future. Furthermore, 89% of participants confirmed that they received sufficient information about the course’s aims and contents. Finally, 94% were satisfied with the logistical information and the related arrangements that were provided before the training sessions started.

In the second training, of 26 participants, 52% evaluated the training class as excellent while 48% assessed it as good. In addition, 76% of participants stated that they would be “very likely” to attend another joint MEDREG-ERRA training in the future. Furthermore, 89% of participants confirmed that they received sufficient information about the course’s aims and contents. Finally, 94% were satisfied with the logistical information and the related arrangements that were provided before the training sessions started.

MEDREG aims to create a Mediterranean regulatory culture. In this context, appropriate training is a crucial component for empowering MEDREG regulators and supporting them to better perform their daily work, building a common understanding and implementation of the main regulatory principles in the Mediterranean region.

Training of national energy regulators serves at least three purposes:

• imparting new knowledge;
• developing and enhancing regulatory skills; and
• networking among participants and building a specific collective identity and professional contacts between technical counterparts.

MEDREG training on the Setting of Tariffs over-met my expectations. I have gained lots of valuable knowledge that I will use to implement our current tariff reform in Egypt in the coming 3 years. I am very satisfied with the course.

Sherif El Sayed, (EgyptERA, Egypt)
Three main internal factors stimulate the demand for more training in Mediterranean energy regulatory issues:

1. For several MEDREG members, the relevant national energy reforms taking place has extended the regulators’ competences in handling relations between electricity producers, transmission operators, distribution companies and end-users. True independence from political and industrial influence is increasingly relevant to ensure a balanced regulatory framework that can attract sufficient investments and protect consumers.

2. The recent relevant gas discoveries, the potentiality of RES integration in the region and the growing complexity of regional energy connections have implications for energy regulators, particularly in the context of the selection of projects of common interest (PCIs), assessment of sustainability of infrastructure, development of cost benefit analyses (CBAs), cross-border cost allocation (CBCA) and rules for access to new infrastructure.

3. The development of energy relations in the Mediterranean generates a spillover effect on the activities of MEDREG itself. The Association’s studies and position papers must account for ongoing changes and be up-to-date in terms of recommendations and indications. Therefore, having more knowledgeable members also reinforces the outputs and reputation of MEDREG.

LOOKING FORWARD

1. Training on the role and scope of regulation: It will consider and explain the main questions and possible answers that characterise the debate on regulatory institutional framework and competences, dealing with the different existing alternatives to regulate the electricity and gas sectors. In addition, it will provide a comprehensive view on the regulatory designs that can govern electricity and gas markets and illustrate the pros and cons of each.

2. Training on regulating infrastructure investment: It will examine how to determine allowed revenues as well as the inclusion of assets in the regulated asset base (RAB), addressing also cost allocation and revenue recovery issues.

3. High level workshop on Mediterranean market designs – How to tackle market power and increase regulatory compatibility: It will be organised for commissioners of regulatory authorities and will focus on regional issues that have an impact on the various countries of the Mediterranean Basin at the policy and technical level, also addressing country-specific challenges.
Regional cooperation is an essential step towards the development of a Mediterranean regulatory culture and constitutes the basis for the progressive integration of energy systems in the Mediterranean region. In this context, institutional cooperation is pursued in all of MEDREG’s actions and activities and it relies on contributions from our members through a combination of approaches: bottom-up, which focuses on the priorities of individual members to inform the priorities of work of the regulators’ network and top-down, which considers the energy priorities of the Mediterranean region to evaluate the necessary changes at the national level. Based on these approaches, MEDREG provides general orientations to members and stakeholders towards a better functioning of energy systems through improved governance and regional cooperation. At the same time, MEDREG introduces a diagnosis and early exchanges on actual problems and needs when designing projects in the Mediterranean Basin.

Another illustration of enhanced institutional cooperation is the Trilateral Cooperation Agreement between MEDREG, the Energy Community Regulatory Board (ECRB) and the Council of European Energy Regulators (CEER), signed in December 2018. Given the geographical proximity of the three organisations as well as some common members, the agreement represented a step forward to foster a compatible and transparent regulation in view of a greater Pan-European energy integration. In particular, the agreement focuses on exchanging best practices in the field of energy market regulation, promoting capacity building activities on regulatory topics and developing joint reports where feasible and beneficial for all three organisations. In this context, two common activities were carried out with the partner organisations, namely a trilateral CEER-ECRB-MEDREG Workshop on “consumer involvement and retail market opening” and a joint report with ECRB on “complaint handling and dispute settlement procedures available to household customers”.

Last but not the least, MEDREG continued to play an active and increasing role in the Union for the Mediterranean (UfM) and in the Regional Electricity Market Platform (UfM REM Platform), enabling MEDREG to reach beyond the sphere of regulators though participation in a multi-stakeholder process involving energy sector participants from across the region. MEDREG’s contributions to the UfM REM Platform are combined with the inputs of Med-TSO and aim at promoting the progressive integration of the power systems and markets in the Euro-Mediterranean region by gradually removing financial, technical, physical and regulatory barriers so that electricity can be traded and freely flow across borders.
demonstrate MEDREG’s key role in the gradual integration of energy systems in the Mediterranean region and promoted the voice, vision and role of the energy regulators in pursuing it. The signature of the Trilateral Cooperation Agreement CEER-ECRB-MEDREG and the Framework Document on Cooperation between MEDREG and other Energy Regulatory Associations from developing countries in 2018 further strengthened our international status.

### LOOKING FORWARD

1. **Cooperation with Med-TSO under the UfM REM Platform**: MEDREG, together with Med-TSO, will formulate some suggestions on the identification and implementation of possible sub-regional pilot projects for electricity market, proposing them to the UfM member states.

2. **Trilateral workshop CEER-ECRB-MEDREG**: It will present the most recent and relevant reports delivered by the MEDREG Consumer Working Group, notably the joint MEDREG-ECRB report on “Complaint handling and dispute settlement procedures available to household customers”.

3. **Cooperation Agreement with RES4MED**: MEDREG has been in regular contact with RES4MED throughout the years, participating to each other’s events. The objective is now to establish a formalised cooperation between the two organisations, focusing on exchange of information, production of joint outputs (trainings or publications) and participation to reciprocal events.

### Quotations

“...The Trilateral Cooperation Agreement between CEER, ECRB and MEDREG reaffirms the values that we all share and puts our cooperation on a firmer basis.”

Giorgi Pangani, ECRB President

“...The arrangement is a logical next step forward for our organisations for greater Pan-European integration.”

Garrett Blaney, CEER President

“We are moving from individual initiatives for cooperation to an integrated approach.”

Gülefan Demirkapı, MEDREG President
MEDREG’s website attracted 10% more visitors than the previous year, while its LinkedIn and Twitter profiles reached a growing number of nearly 1,000 followers. MEDERE has also become active on Instagram.

PROMOTING THE REPORTS AND EVENTS THROUGH APPEALING VIDEOS

Seventeen recorded interviews and three professional videos were produced to promote MEDREG’s technical work as well as its major trainings and events, generating 2,000 views on its YouTube channel. By unveiling the people behind the elaboration and drafting of reports, these short interviews and films not only increased the visibility and recognition of our members but also amplified the stakeholders’ messages on the important role that MEDREG plays in establishing a Euro-Mediterranean energy market.

TRANSLATING TECHNICAL WORK INTO ENGAGING LEAFLETS IN MULTIPLE LANGUAGES

Four of the Association’s major technical reports were converted into pedagogical leaflets that summarise and highlight their main findings and conclusions. These reader-friendly and accessible publications were promoted online and at events, enabling MEDREG’s members and wider audiences to grasp the essence of its technical work as well as its key recommendations.

In addition, seven key reports were translated into Arabic and French, reaching a larger number of regulatory staff within our members and of energy stakeholders.

Furthermore, the elaboration of a case study based on the EgyptERA peer review conducted in 2017 demonstrated how MEDREG empowered the Egyptian energy regulator to protect consumers in a liberalised electricity market.

SHARING THE NEWS AND SUCCESSES TO A GROWING AUDIENCE

In 2018, twenty news alerts and four quarterly newsletters were sent out to members, external partners and subscribers. MEDREG appeared in fifty EU and Mediterranean press articles in addition to the hundred coverage generated by the Presidency election, mainly in the Turkish press.

RAISING THE PROFILE OF THE ORGANISATION

An institutional leaflet presenting the organisation, its mission, key activities, recent achievements and unique position in the energy sector in the Mediterranean was widely distributed on the occasion of international events. MEDREG’s Annual Report 2017, which emphasised the concrete results of MEDREG’s actions, was disseminated to 500 energy stakeholders all around the Mediterranean and at the EU level. Finally, an inspirational and pedagogical video was produced to explain the importance of the Mediterranean region from a historical, cultural, environmental and economic perspective. The video also raised awareness of MEDREG’s contribution in the establishment of a Euro-Mediterranean energy market through regulatory cooperation.
With the aim to share best practices, advocate its views, share its knowledge and extend partnerships, MEDREG actively took part in high-level energy discussions and fora in the Mediterranean region.

In 2018, MEDREG organised a series of technical trainings, thematic workshops and study visits for its members, which facilitated the exchange of best practices and deepened MEDREG’s members’ regulatory knowledge and expertise.

The organisation also partnered with peer regional regulatory associations at international events and smaller scale workshops to further raise the voice of regulators and exchange perspectives on critical issues, such as consumer protection, energy transition, digitalisation and sustainable infrastructure.

The organisation also participated in key stakeholder events around the Mediterranean, advocating its messages, engaging in dialogue and fostering cooperation with energy players active in the Euro-Mediterranean region, addressing varied topics around sustainable energy, market integration, energy infrastructure, investment and geopolitical issues.

MEDREG’s involvement in the UfM Energy Platforms and cooperation with Med-TSO also translated into frequent meetings throughout the year.
23rd Energy Community Electricity Forum, 7 June 2018, Athens (Greece)

PAM - WTO Joint High-Level Meeting, 12–13 July 2018, Belgrade, (Serbia)

6th Vienna Forum on European Energy Law, 27-28 September 2018, Vienna (Austria)

AEIT International Conference 2018, 3–5 October 2018, Bari (Italy)

5th International Workshop on the Power Grid Models of the Future, 11 October 2018, Milan (Italy)

17th ERRA Energy Investment and Regulation Conference and 9th Turkey Energy Summit, 9–10 October 2018, Antalya (Turkey)

RES4MED Conference on RES in Morocco, 8 November 2018, Rimini (Italy)

6th ERRA Training Course on Natural Gas Market Regulation, 12–16 November 2018, Budapest (Hungary)

MEDREG-MED-TSO coordination meeting, 12 July 2018, Rome (Italy)

UfM Gas Platform Steering Committee Meeting, 26 July 2018, Paris (France)

UfM Energy Platforms Steering Committee Meeting, 26 September 2018, Beirut (Lebanon)

UfM Gas Platforms Meeting, 7 November 2018, Paris (France)

INSTITUTIONAL

Peer Review to the Jordanian Energy Regulator (EMRC) on Electricity Licensing Procedures

Support to the Evaluation of a Net Metering System in Palestine

ELECTRICITY

Regulatory Options for the Stimulation of Infrastructure Investments

Fact finding and Review of Challenges in Investment in Infrastructure

Towards a MEDREG Electricity Market Observatory

GAS

Guidelines of Good Practice on Capacity Allocation

Guidelines of Good Practice on Third Party Access in the Mediterranean Region

MEDREG Good Practices on Tariff Methodologies - Case Studies

RES

Smart Grids in Mediterranean Countries

CONSUMERS

Complaint Handling and Dispute Settlement Procedures Available to Household Customers - Status review

Overview on Disconnection Procedures due to Non-Payment in the Mediterranean Region

PUBLICATIONS

MEDREG’s Informative Leaflet

Booklet on the Mediterranean Energy Regulatory Outlook 2017

Case Study of EgyptERA Peer Review

Leaflet on Gas Markets in the Mediterranean Region

Leaflet on Smart Grids in the Mediterranean Countries

Handbook on the Training on Setting of tariffs

Handbook on the Training on Electricity Market Monitoring Tools

MEDREG’s Annual Report 2017
The General Assembly (GA) is the decision-making body of the Association and meets two times every year. Among other prerogatives, the General Assembly approves MEDREG’s Action Plan, the annual budget of the Association, reports and studies issued by the Working Groups (WGs) and the Secretariat as well as protocols and agreements with external bodies and organisations. The GA elects the President and Vice-Presidents of MEDREG as well as the Chairs and Vice-chairs of the Working Groups.

It consists of the President, the Vice-Presidents, the Chairpersons of the Working Groups, high-level representatives from MEDREG members as well as from the MEDREG Secretariat. The European Commission is invited to the General Assembly meetings as an observer with no voting rights.

**GENERAL ASSEMBLY**

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It consists of the President, the Vice-Presidents, the Chairpersons of the Working Groups, high-level representatives from MEDREG members as well as from the MEDREG Secretariat. The European Commission is invited to the General Assembly meetings as an observer with no voting rights.

**AREAS OF WORK**

Currently, MEDREG has five Working Groups (WGs), composed of representatives from each member regulator. Working Groups are permanent bodies of the Association. They meet physically at least twice a year and are led by two regulators acting as co-chairs, supported by another regulator acting as vice-chair. WGs organise their annual agenda based on the principle of subsidiarity.

**STEERING COMMITTEE**

The Steering Committee coordinates the ordinary activities of the Association in accordance with the General Assembly’s instructions, preparing its work, supervising the implementation of the Action Plan and providing orientations. The Steering committee has no decisional powers. It is composed of the President, the Vice-Presidents, the Chairpersons of the Working Groups as well as the MEDREG Secretariat.

**ELECTRICITY - ELE WG**

The ELE Working Group is in charge of assessing the current status of electricity markets and regulatory frameworks in MEDREG countries and their possible developments. It aims to identify and propose basic requirements that will lead to the compatibility of electricity regulation in the MEDREG region, developing a competitive, strengthened and running regional electricity market in the region.

In recent years, the group has developed and adopted an innovative approach to define its activities and reports based on a bottom-up approach that identifies the specific needs and priorities expressed by the members, particularly the Southern ones, to propose ad hoc solutions to respond to them.
The Secretariat develops and implements the MEDREG strategy in close coordination with all the members, enhancing MEDREG’s accountability and institutional cooperation in the Mediterranean energy sector.

The MEDREG Secretariat is in charge of the management and development of the Association’s activities, guaranteeing continuous support to the President, Vice-Presidents and all members.

NATURAL GAS - GAS WG

The GAS Working Group assesses the current status of natural gas and LNG markets in Mediterranean countries, their relevant regulatory frameworks and possible evolutions. The Group elaborates Guidelines of Good Practice (GGP) and recommendations for the development of an integrated, competitive, secure and effective gas market in the region.

Recently, the group has focused on the analysis of the convergence of regulatory measures among Mediterranean countries, which can foster gas market integration, namely third-party access and capacity allocation mechanisms.

ENVIRONMENT, RENEWABLE ENERGY SOURCES AND ENERGY EFFICIENCY WORKING GROUP (RES WG)

The RES WG focuses on the legislative and regulatory mechanisms used to promote renewable electricity generation, energy efficiency and RES deployment in the Mediterranean area, with attention to off-grid solutions and independent power producers (IPPs).

In the last few years, the RES WG has focused its activities on analysing the state of play of deployment of innovative technologies such as smart meters and smart grids in the Mediterranean region, deepening their impact in reducing electricity prices as well as evaluating potential regulatory measures to overcome limitations to their deployment.

CONSUMER WORKING GROUP (CUS WG)

The Consumer WG works to enhance the protection of household consumers in MEDREG countries. This includes the preparation of surveys and recommendations on energy billing, the developments of standards on consumer protection and information and the study of how the role of consumers in the energy market is evolving. The CUS WG also identifies and promotes best practices in consumer protection, including vulnerable customers and quality of service of electricity and gas, from the point of view of final consumers.

Recently, the CUS WG has been seeking synergy among other organisations to reinforce its capability to support the strengthening of consumer protection in the Mediterranean region and beyond.

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Junior Energy Expert
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