

# MERCADOS DE ENERGIA : UMA VISÃO EUROPEIA

Jorge Vasconcelos

NEWES, New Energy Solutions

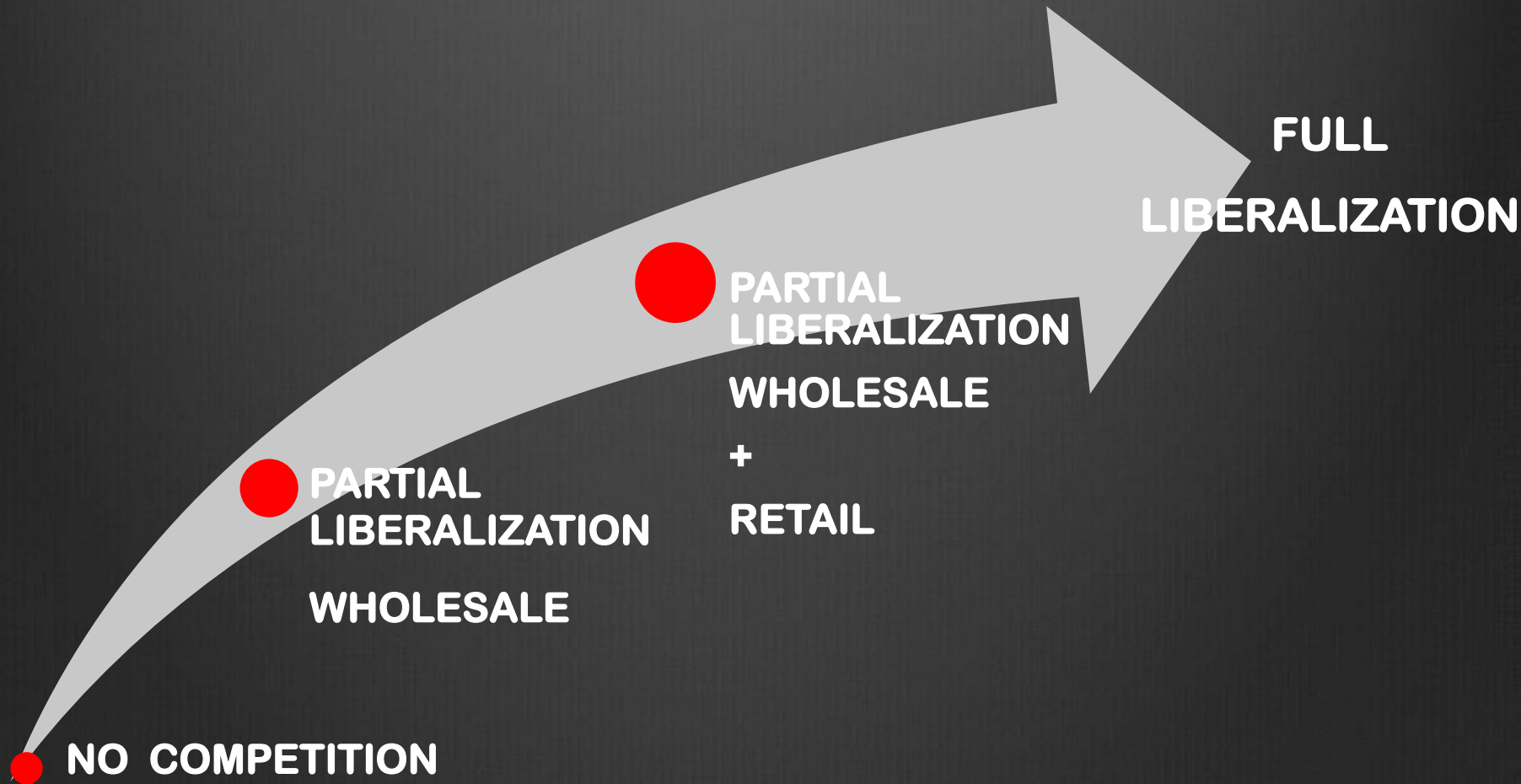
FENAREG

Lisboa, 23 Novembro 2016

# **MERCADOS DE ENERGIA : UMA VISÃO EUROPEIA**

- 1. DOS MONOPÓLIOS AOS MERCADOS DE ENERGIA**
- 2. ENERGIA E ALTERAÇÕES CLIMÁTICAS**
- 3. A TRANSIÇÃO ENERGÉTICA**

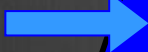
# DIFFERENT DEGREES OF ELECTRICITY MARKET LIBERALIZATION



# MAJOR MILESTONES



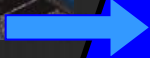
# THE EUROPEAN MODEL



**FREEDOM OF  
INVESTMENT**

**REGULATED  
ACCESS T,D,LNG**

**FREEDOM OF  
CHOICE**



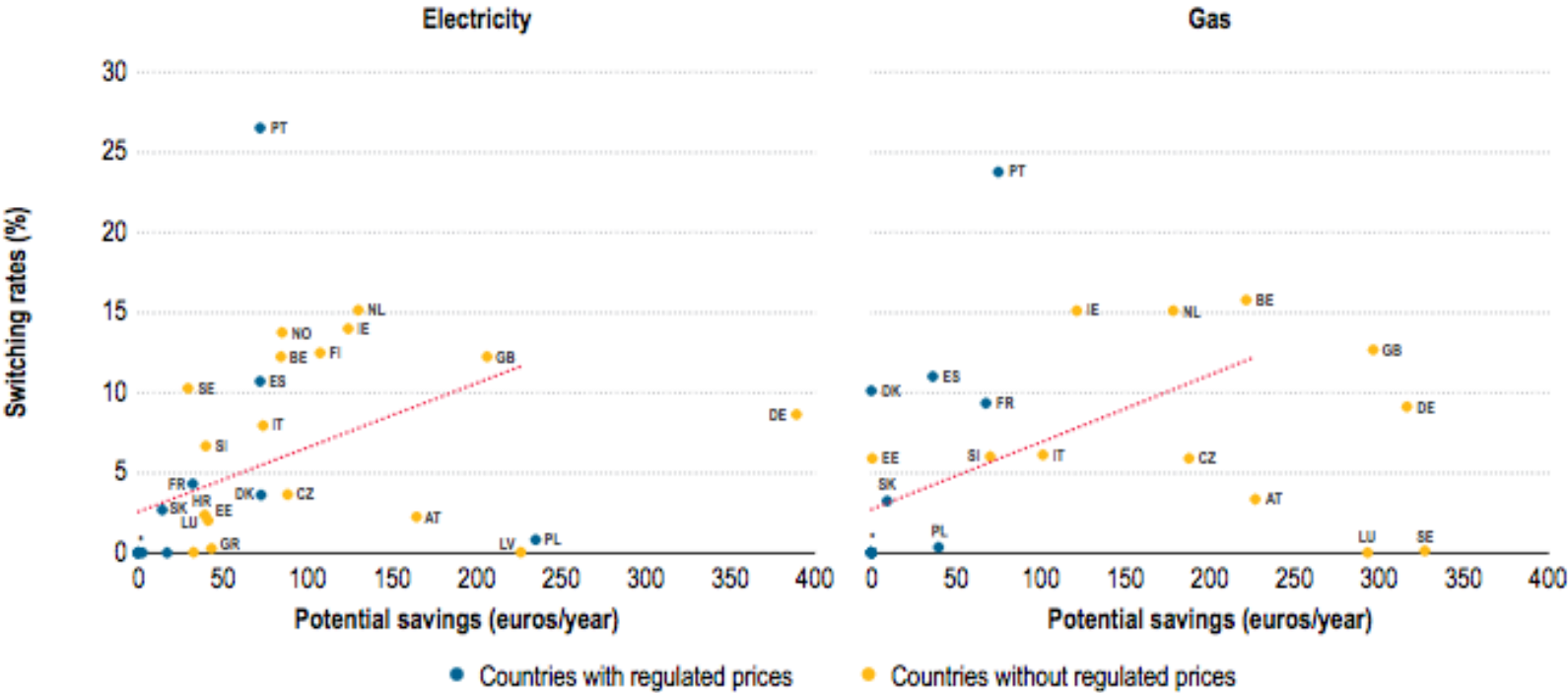
**SINCE THE 1st  
OF JULY 2007  
ALL  
ELECTRICITY  
AND  
GAS  
CONSUMERS  
ARE FREE TO  
CHOOSE  
SUPPLIER  
FROM ANY  
MEMBER STATE**





# **THE** ELECTRICITY MARKET DOESN'T EXIST

Figure 19: Relationship between 'external' switching rates and annual savings available in capital cities of EU MSs and Norway – 2015 (% , euros)

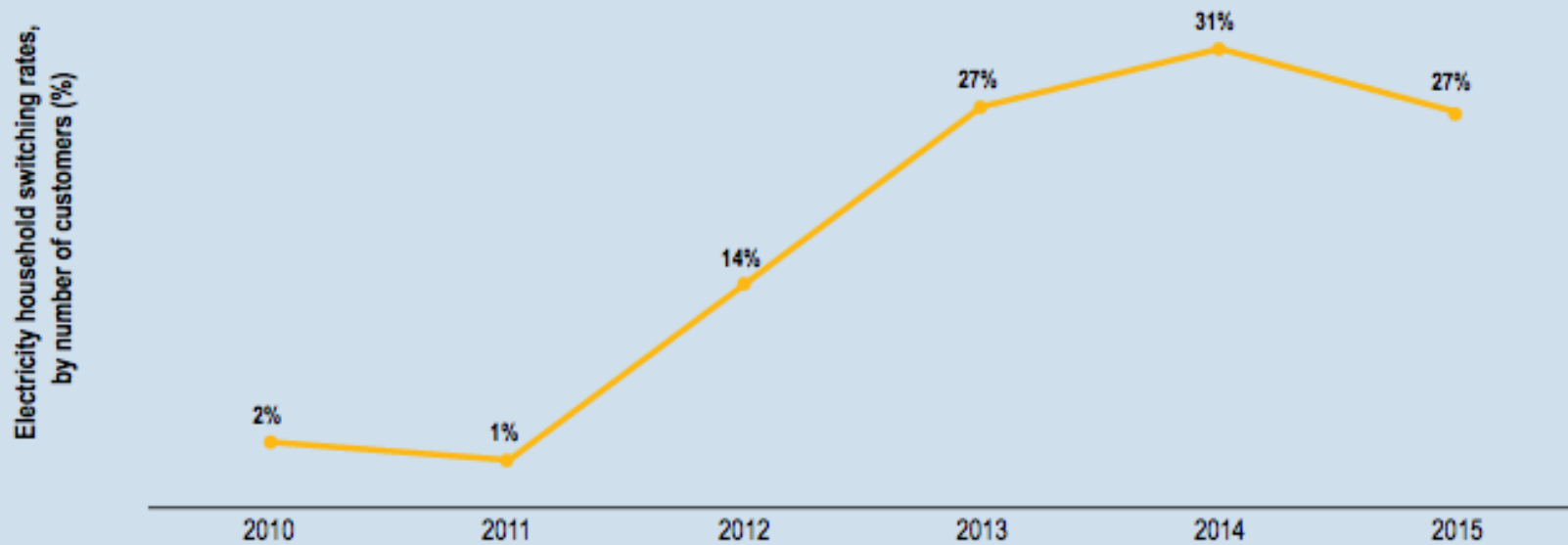


Source: ACER Retail Database (2016) and CEER National Indicators Database (2016).

[http://www.acer.europa.eu/Official\\_documents/Acts\\_of\\_the\\_Agency/Publication/ACER%20Market%20Monitoring%20Report%202015%20-%20ELECTRICITY%20AND%20GAS%20RETAIL%20MARKETS.pdf](http://www.acer.europa.eu/Official_documents/Acts_of_the_Agency/Publication/ACER%20Market%20Monitoring%20Report%202015%20-%20ELECTRICITY%20AND%20GAS%20RETAIL%20MARKETS.pdf)



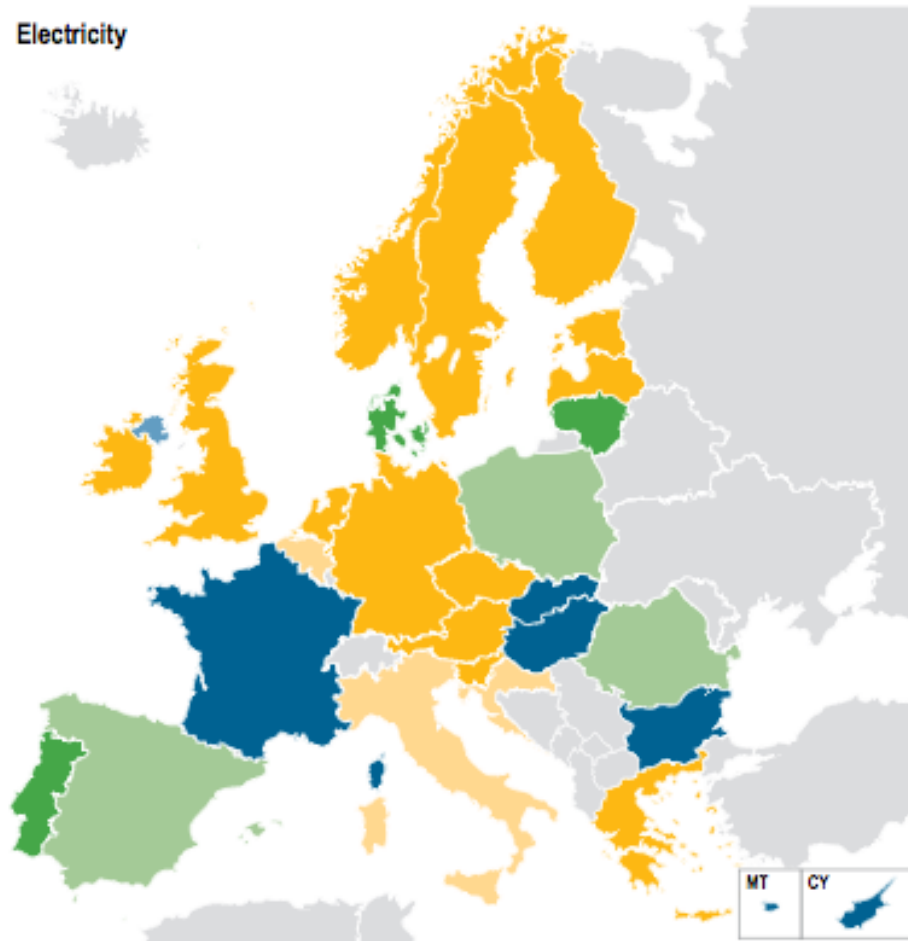
Figure (ii): Electricity household switching rates, Portugal, 2010–2015 (%)



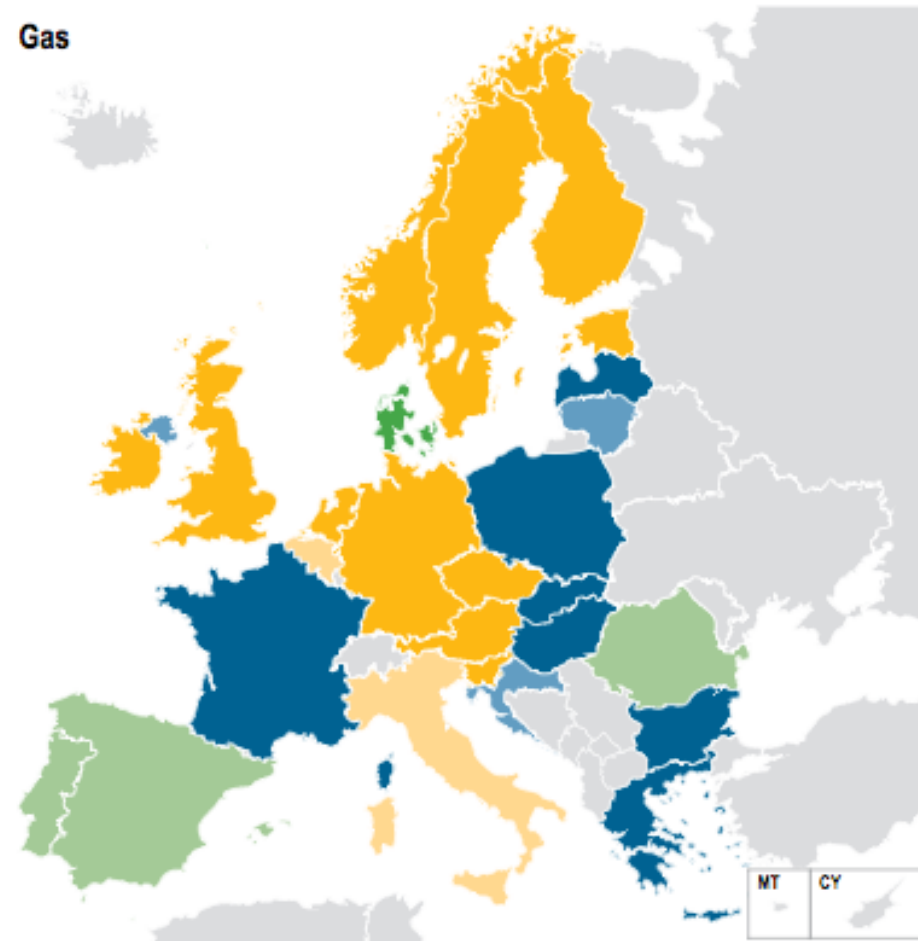
Source: ERSE.

[http://www.acer.europa.eu/Official\\_documents/Acts\\_of\\_the\\_Agency/Publication/ACER%20Market%20Monitoring%20Report%202015%20-%20ELECTRICITY%20AND%20GAS%20RETAIL%20MARKETS.pdf](http://www.acer.europa.eu/Official_documents/Acts_of_the_Agency/Publication/ACER%20Market%20Monitoring%20Report%202015%20-%20ELECTRICITY%20AND%20GAS%20RETAIL%20MARKETS.pdf)

## Electricity



## Gas

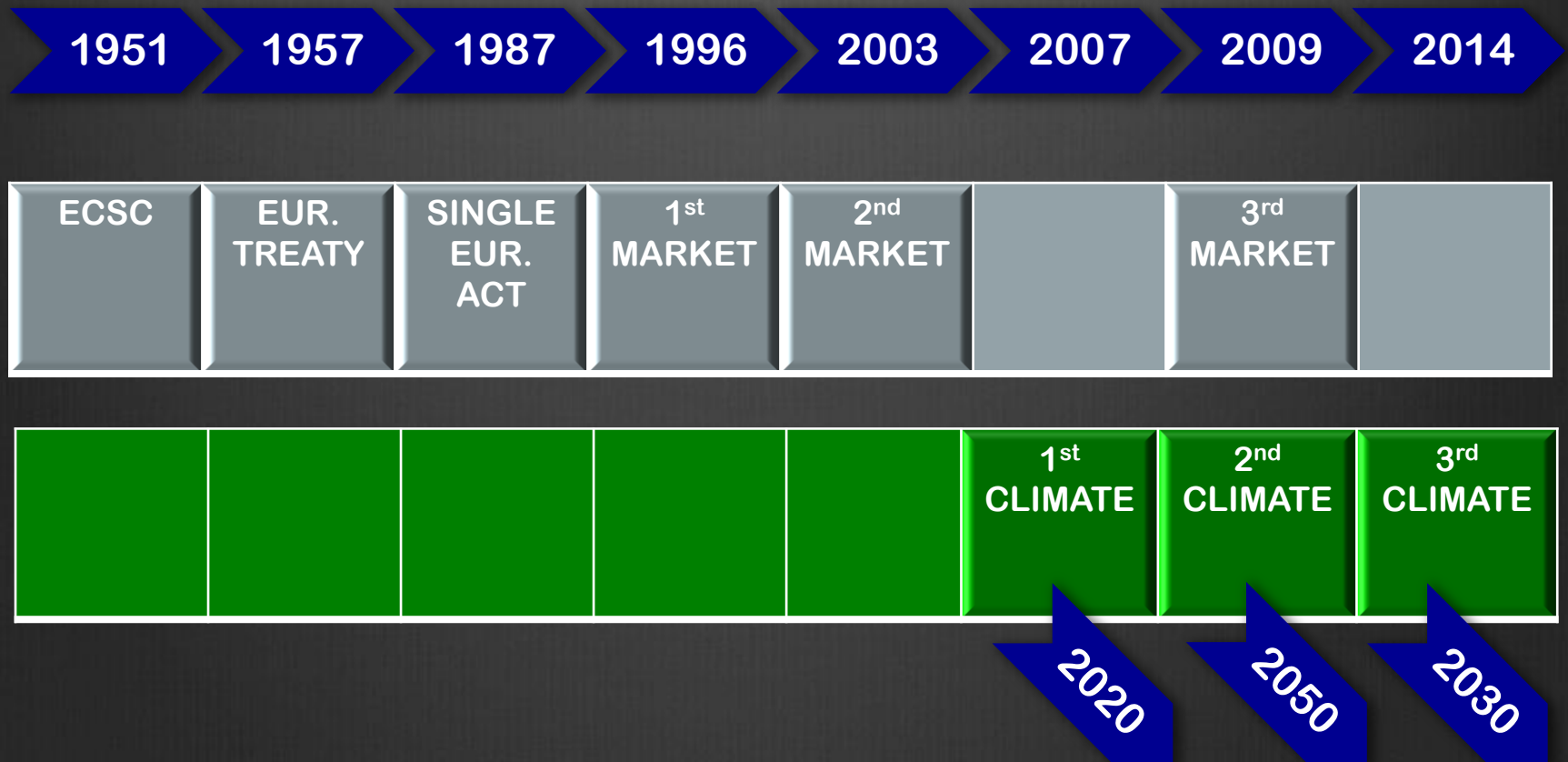


- Regulated prices for the entire retail market
- Regulated prices for the household segment
- Regulated prices for the entire retail market with roadmap for their removal

- Regulated prices for the household segment with roadmap for their removal
- Non-regulated prices with (a potential) ex-ante intervention in price setting
- Non-regulated prices

[http://www.acer.europa.eu/Official\\_documents/Acts\\_of\\_the\\_Agency/Publication/ACER%20Market%20Monitoring%20Report%202015%20-%20ELECTRICITY%20AND%20GAS%20RETAIL%20MARKETS.pdf](http://www.acer.europa.eu/Official_documents/Acts_of_the_Agency/Publication/ACER%20Market%20Monitoring%20Report%202015%20-%20ELECTRICITY%20AND%20GAS%20RETAIL%20MARKETS.pdf)

# MAJOR MILESTONES

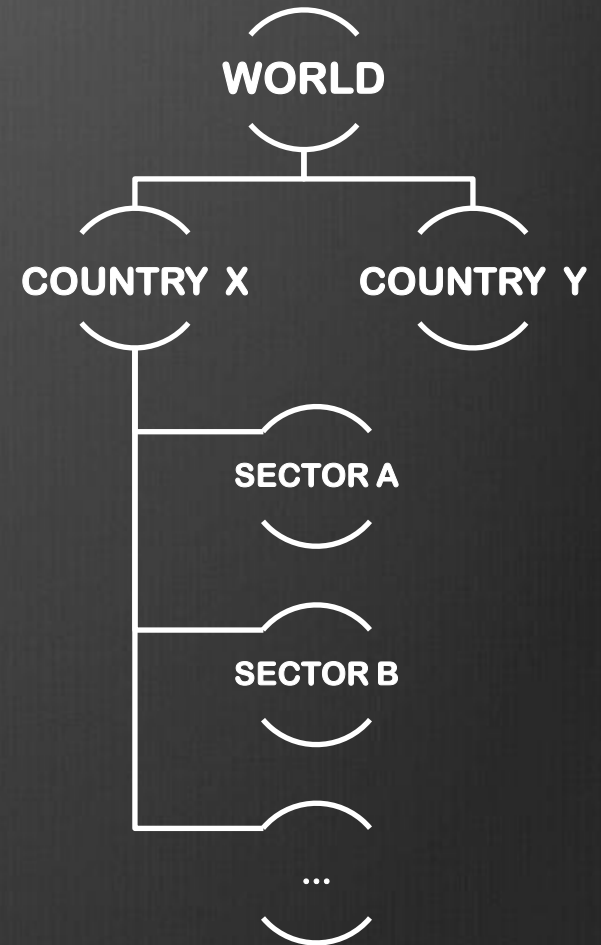


*“reducing greenhouse gas emissions by 80-95% by 2050  
compared to 1990 as agreed in October 2009 will require a  
revolution in energy systems , which must start now”*

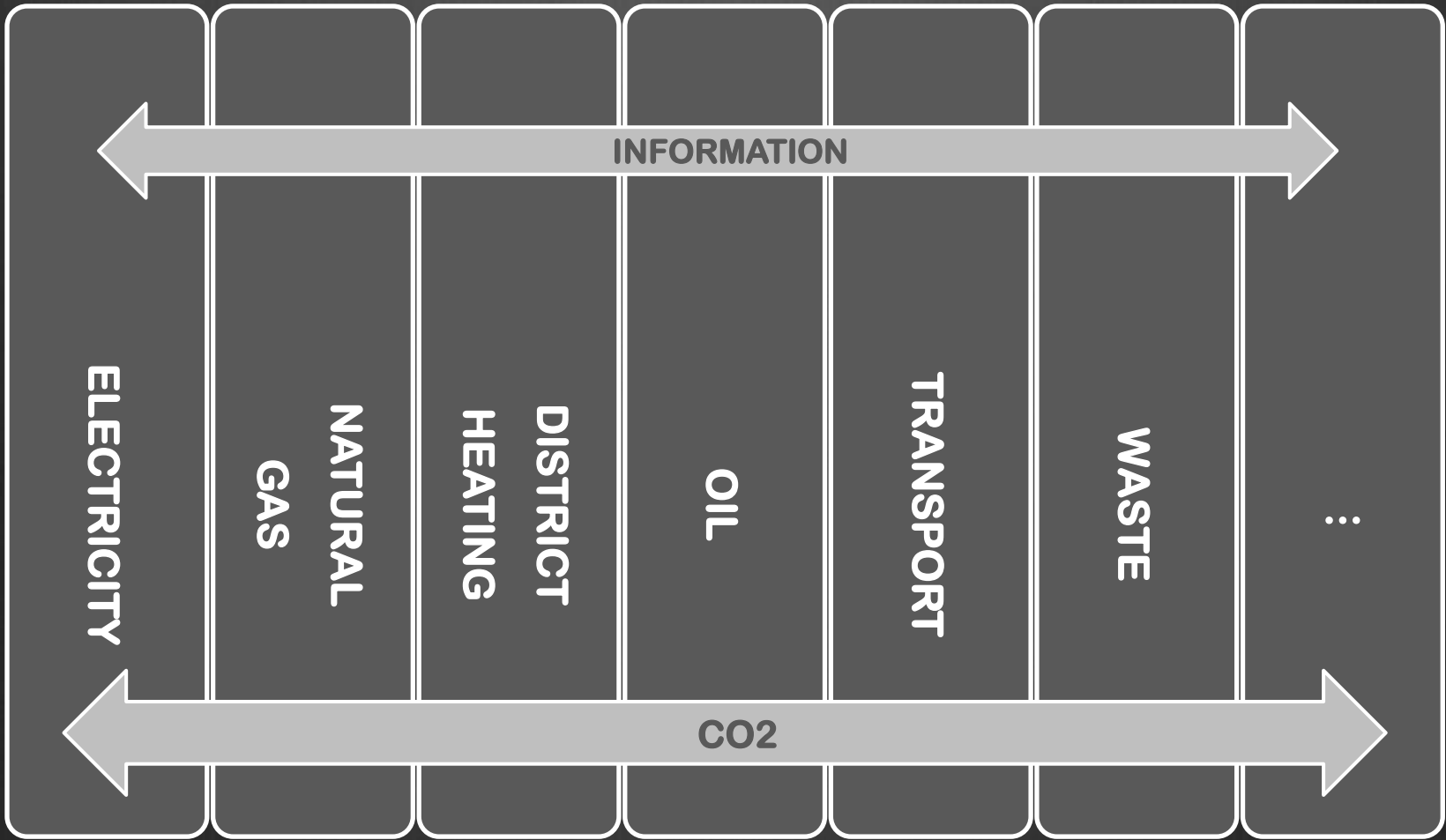
European Council, February 2011



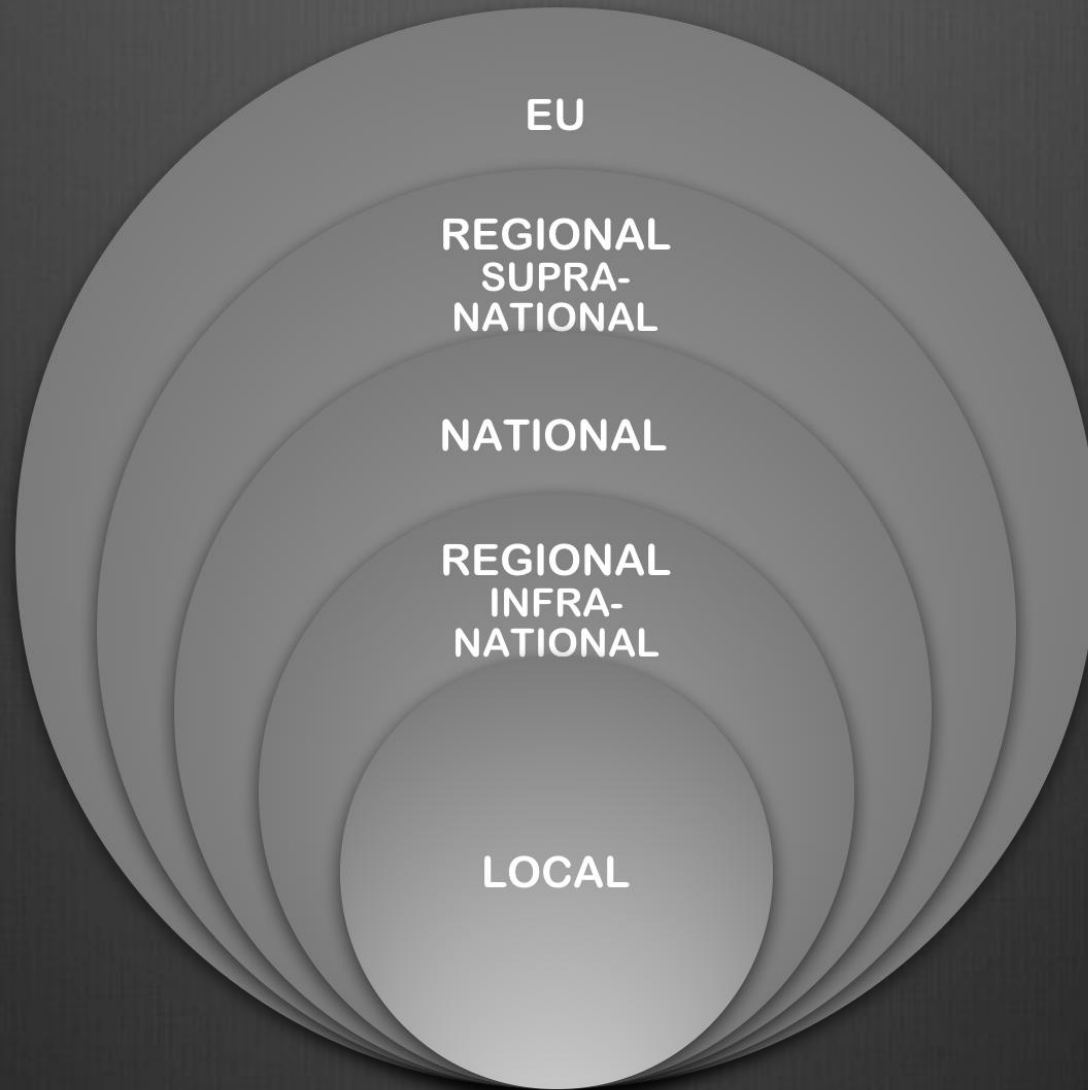
# PARIS AND BEYOND



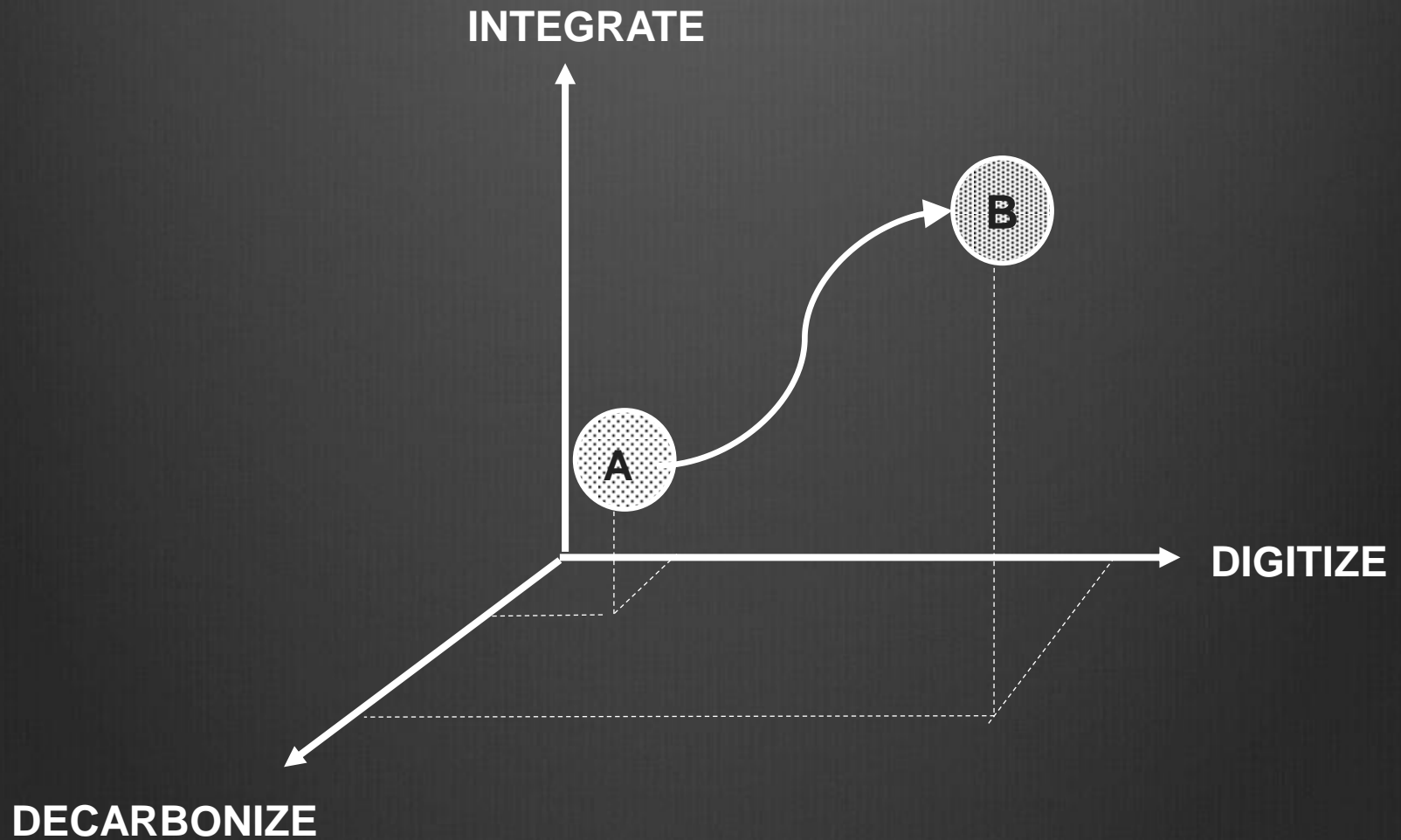
increasing connectedness of local energy related sectors

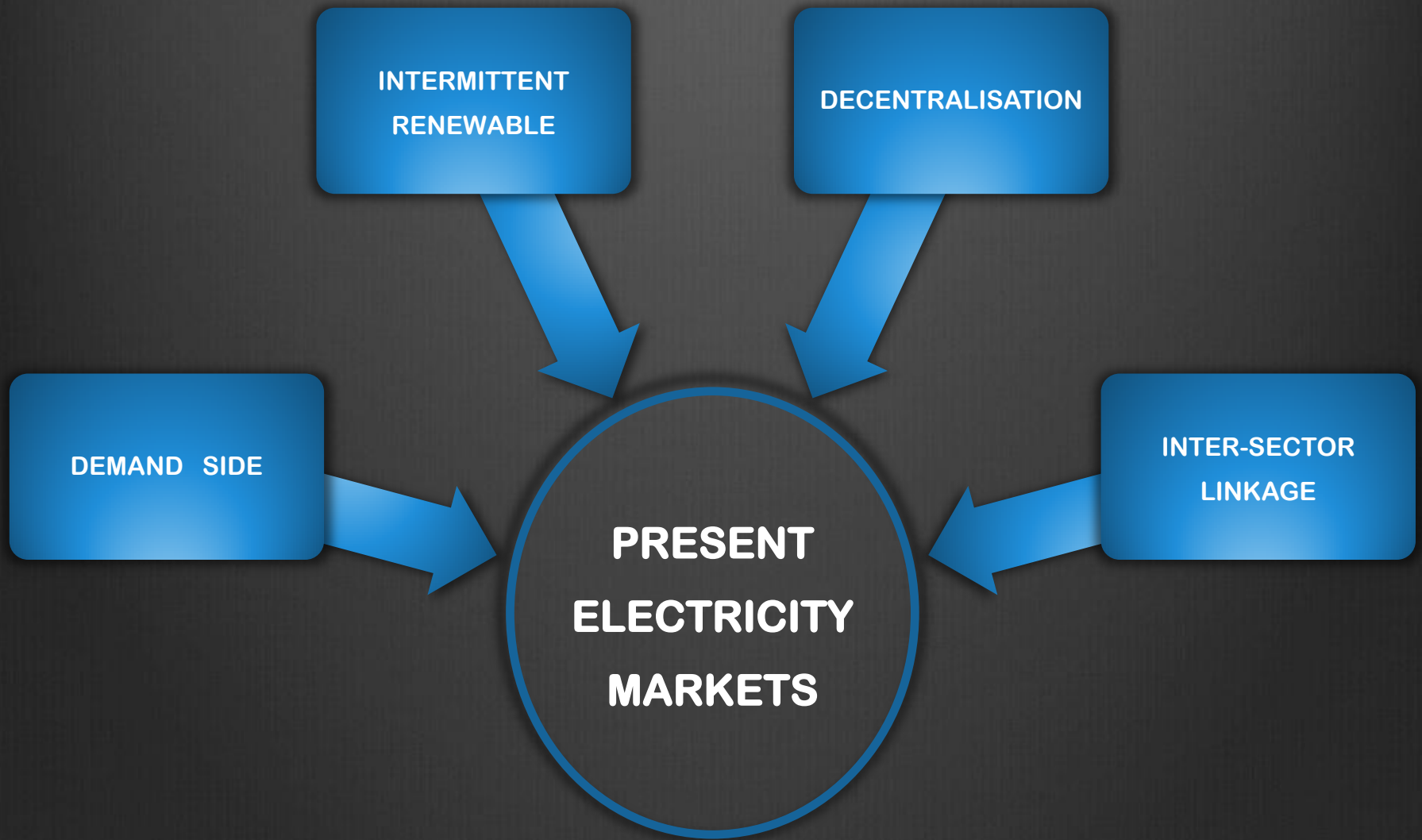






# THE 3 DIMENSIONAL EU ENERGY TRANSITION





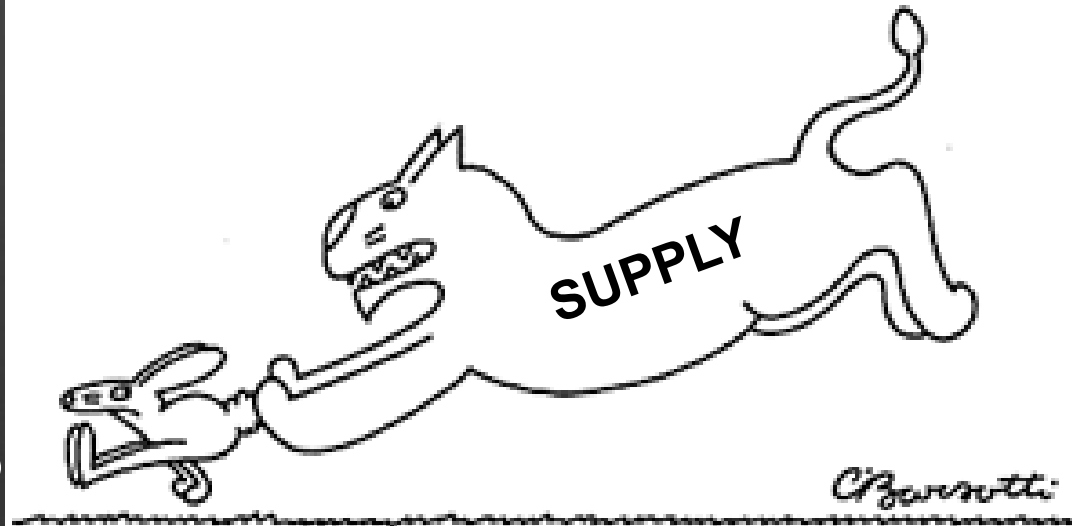




The image shows two old, weathered electrical meters mounted on a wall. The meters are light-colored, possibly yellow or beige, and show significant signs of age and wear, including peeling paint and rust. The meter on the left has a digital display showing '45999.4 kWh'. The meter on the right has a digital display showing 'K 49883.2 kWh' and 'M 00001.9'. Both meters have a small window with a needle and scale, and some text in Greek is visible on the right meter. A black text box with white text is overlaid on the bottom left of the image.

# TECHNOLOGICAL BARRIER

© Cartoonbank.com



**DEMAND**

*"What are you complaining about?  
It's a level playing field."*

**EPISTEMOLOGICAL  
BARRIER**



**CEER**

**Council of European  
Energy Regulators**



Fostering energy markets, empowering **consumers**.

## **CEER Benchmarking report on removing barriers to entry for energy suppliers in EU retail energy markets**

**Ref: C15-RMF-70-03  
1 April 2016**

Council of European Energy Regulators asbl  
Cours Saint-Michel 30a, Box F – 1040 Brussels, Belgium  
Arrondissement judiciaire de Bruxelles – RPM 0861.035.445

[http://www.ceer.eu/portal/page/portal/EER\\_HOME/EER\\_PUBLICATIONS/CEER\\_PAPERS/Customers/Tab6/C15-RMF-70-03\\_BR\\_barriers\\_to\\_entry\\_for\\_suppliers\\_1-Apr-2016.pdf](http://www.ceer.eu/portal/page/portal/EER_HOME/EER_PUBLICATIONS/CEER_PAPERS/Customers/Tab6/C15-RMF-70-03_BR_barriers_to_entry_for_suppliers_1-Apr-2016.pdf)

**CEER**

**Council of European  
Energy Regulators**



Fostering energy markets, empowering **consumers**.

## **Position paper on well-functioning retail energy markets**

**Ref: C15-SC-36-03  
14 October 2015**

Council of European Energy Regulators asbl  
Cours Saint-Michel 30a, Box F – 1040 Brussels, Belgium  
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[http://www.ceer.eu/portal/page/portal/EER\\_HOME/EER\\_PUBLICATIONS/CEER\\_PAPERS/Customers/Tab5/C15-SC-36-03\\_V19\\_Well-functioning\\_retail\\_markets.pdf](http://www.ceer.eu/portal/page/portal/EER_HOME/EER_PUBLICATIONS/CEER_PAPERS/Customers/Tab5/C15-SC-36-03_V19_Well-functioning_retail_markets.pdf)

