

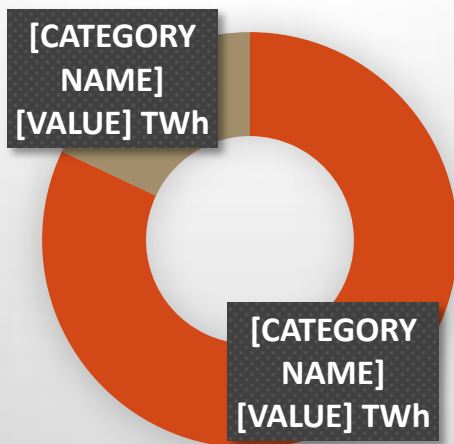
South East Europe Power Market Development

Albanian Power Market

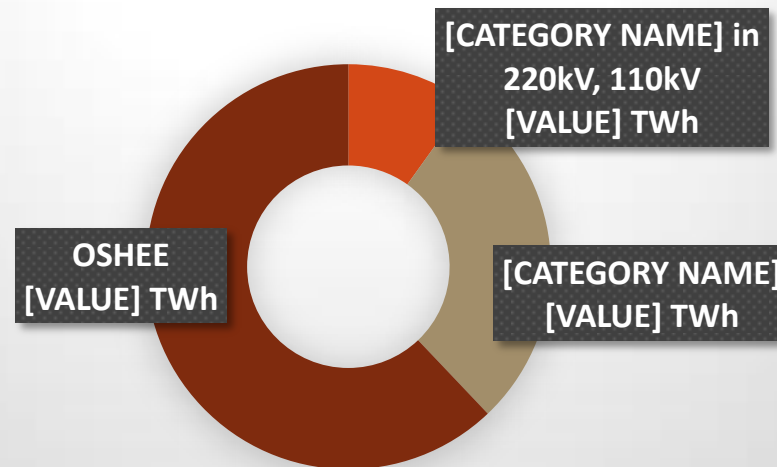
SKOPJE, SEPTEMBER 2019

Albanian Power Market – Key facts for 2018

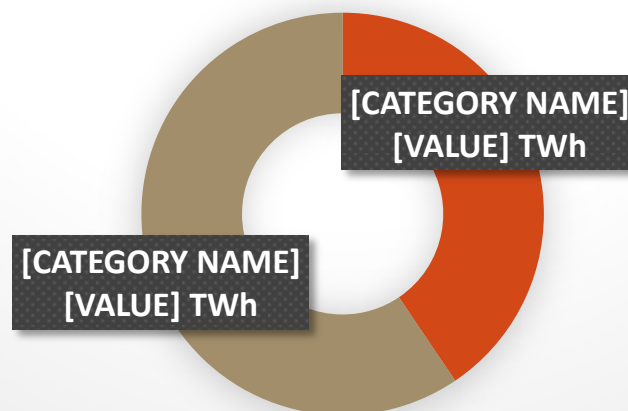
1. Energy in Albanian System in 2018 (TWh)



2. Energy in Transmission System in 2018 (TWh)



3. Energy in Albanian Energy Market in 2018 (TWh)

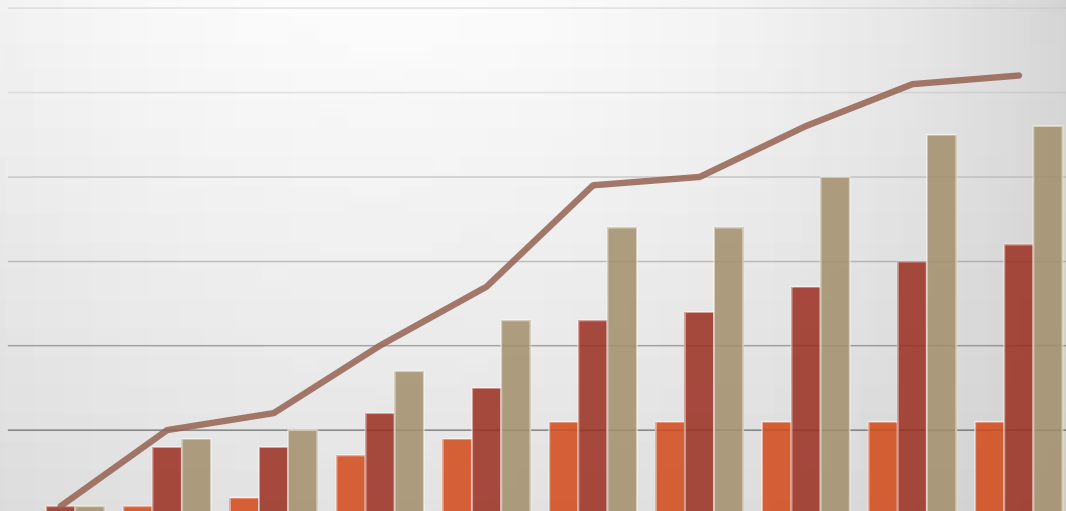


Total energy in Albanian Energy Market in 2018:

9.84 TWh

Albanian Power Market Participants

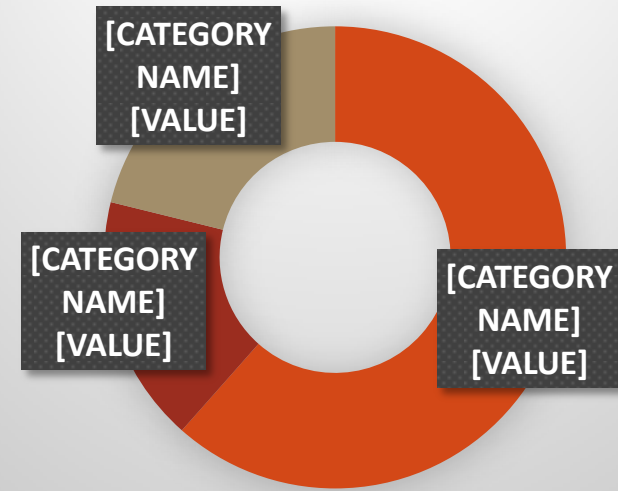
1. Market Participants in Albanian Power Market



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Producers	0	1	2	7	9	11	11	11	11	11
Suppliers	1	8	8	12	15	23	24	27	30	32
Traders	1	9	10	17	23	34	34	40	45	46
Total Participants	1	10	12	20	27	39	40	46	51	52

■ Producers
 ■ Suppliers
 ■ Traders
 — Total Participants

2. Market Participants Status (2019)

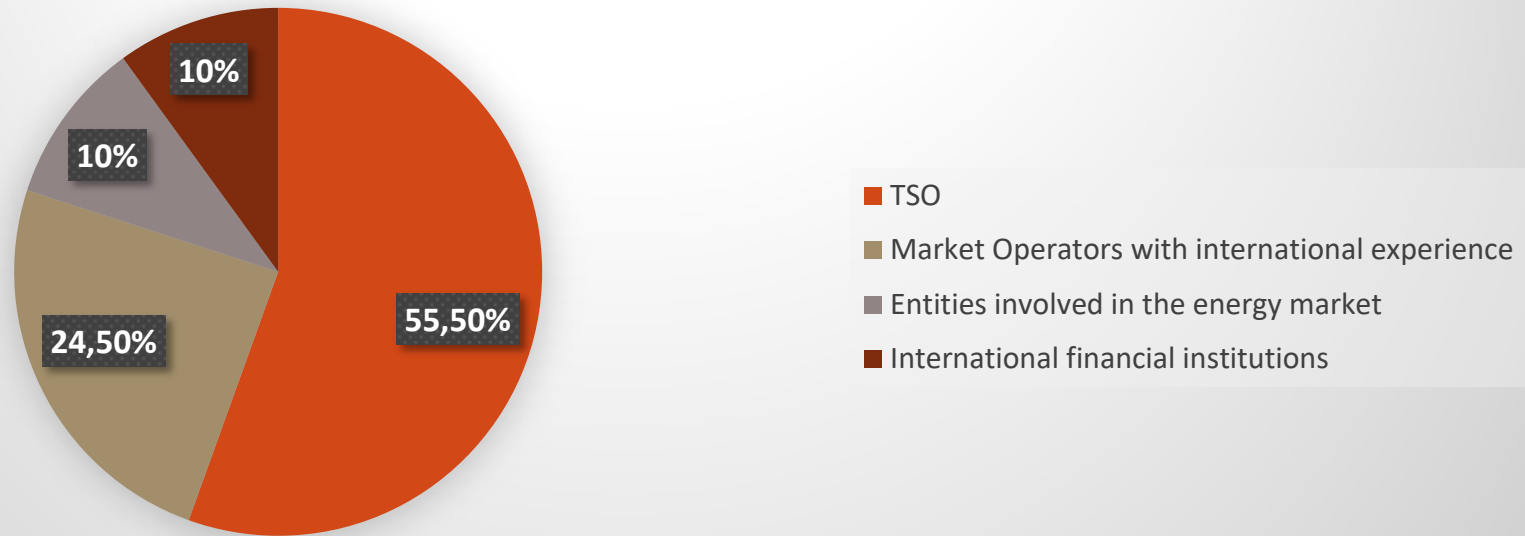


Total Market Participants:
52 participants

Albanian Power Market Establishment

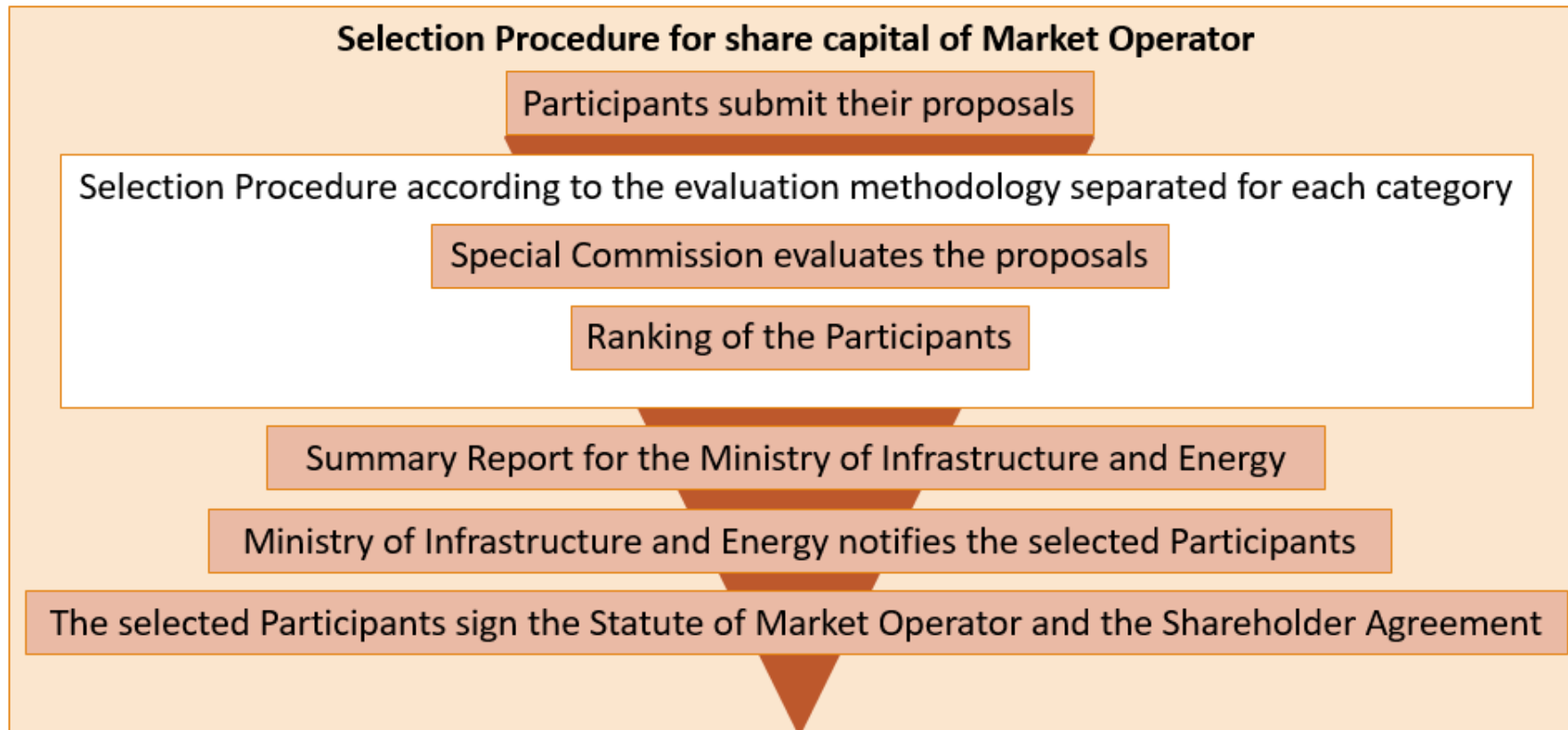
- DCM No. 322, 15.5.2019 defines the minimum initial capital of Market Operator, (financed by the TSO)

The structure of the shareholders that own the capital



Albanian Power Market Establishment

- DCM No. 609, 11.9.2019 defines the criteria and the procedures for participant selection in the Market Operator Capital.



Regional Market Coupling challenges

Albania-Kosovo (OST-KOSTT)

- The 400kV line energizing and operating remains a challenge for the Market Coupling initiative, under the non implementation of the Connectivity Agreement between EMS and KOSTT.

Albania-Bulgaria-North Macedonia (OST-ESO-MEPSO) (MoU for development of electricity market is signed)

- The 400kV line construction is a strong barrier for the market coupling implementation.

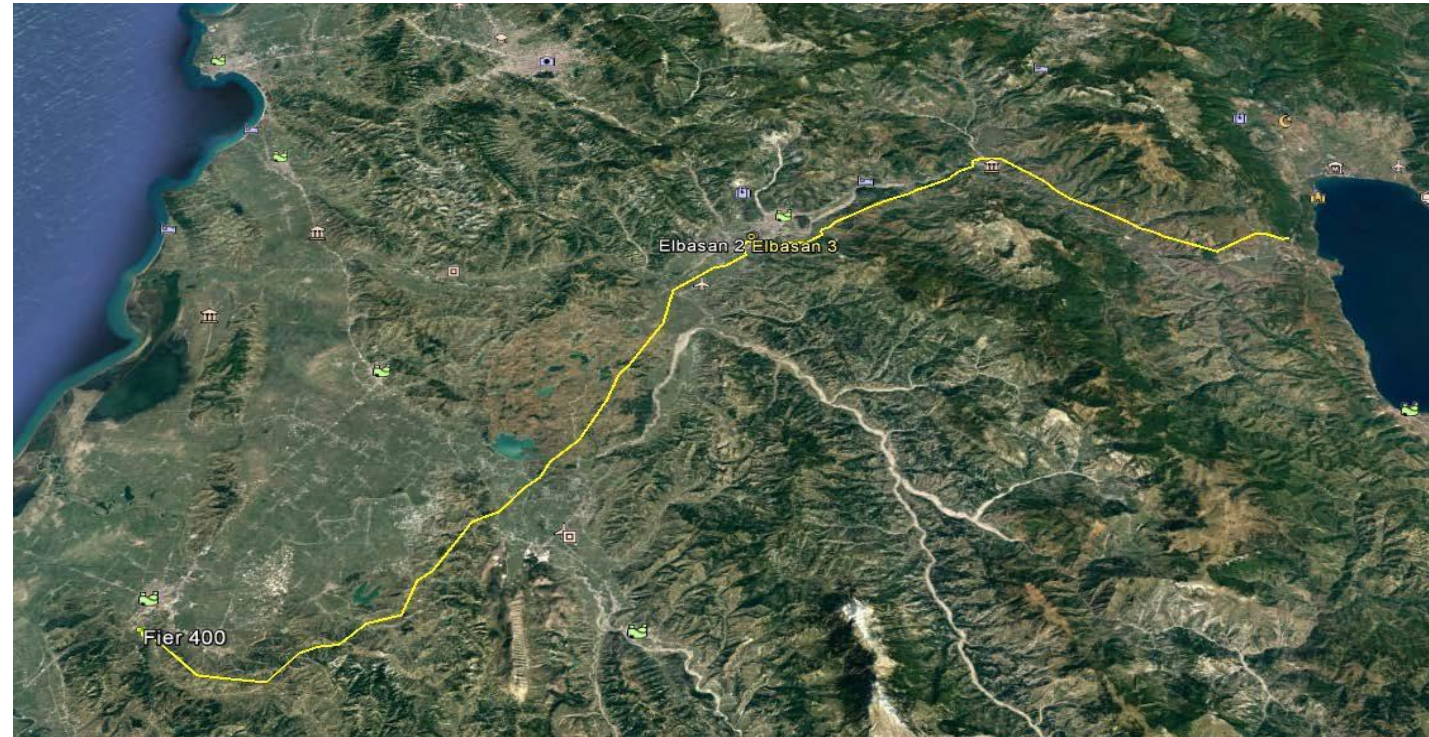
Albania-Italy-Montenegro-Serbia – AIMS (OST-TERNA-CGES-EMS)

- The legal framework differences between EU and non-EU countries as well as the situation between KOSTT and EMS brings up the challenge of how to deal with the allocations at IT-ME and SR/KS-AL borders.

400 kV Interconnection Elbasan-Ohrid-Bitola (AL-MK) Project

The project includes:

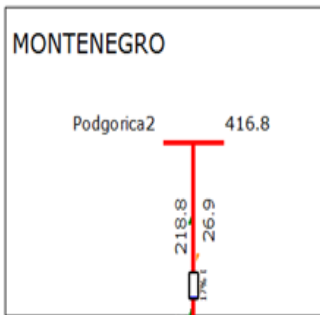
- A new 400 kV Interconnection line construction (Elbasan 2 - Ohrid - Bitola), 151km (56 km in Albanian territory).
- Elbasan 2 S/s extension and a new 120 MVar shunt reactor installation.
- A new 400kV transmission line construction (Elbasan 2- Fier), 74 km. Extension of Fier S/s, with a new AT-400 MVA(400/220kV).



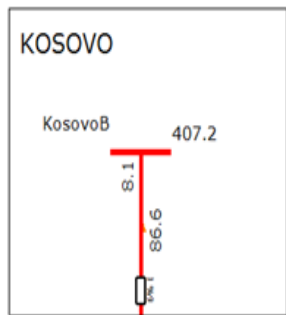
- The construction phase is foreseen to start by the **end of 2019** and is expected to be in operation on **2021**.
- It is financed by **KfW** with a value of loan **70Mil Euro**

Regional Market – Import/Export Capacities

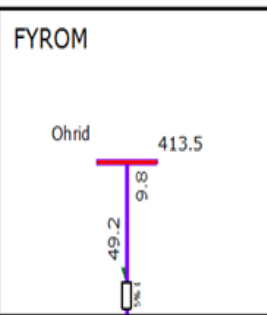
NTCexport=400MW



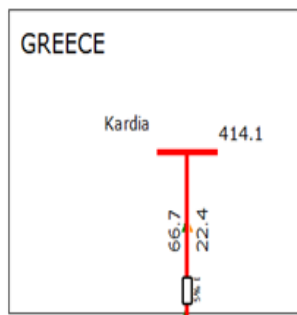
NTCexport=400MW



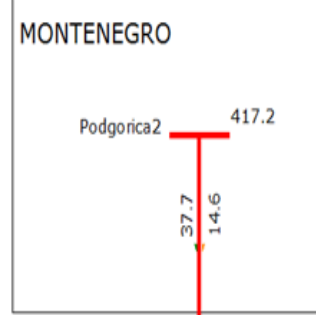
NTCexport=300MW



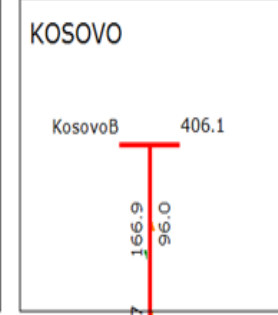
NTCexport=250MW



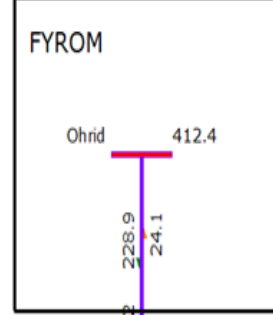
NTCimport=400MW



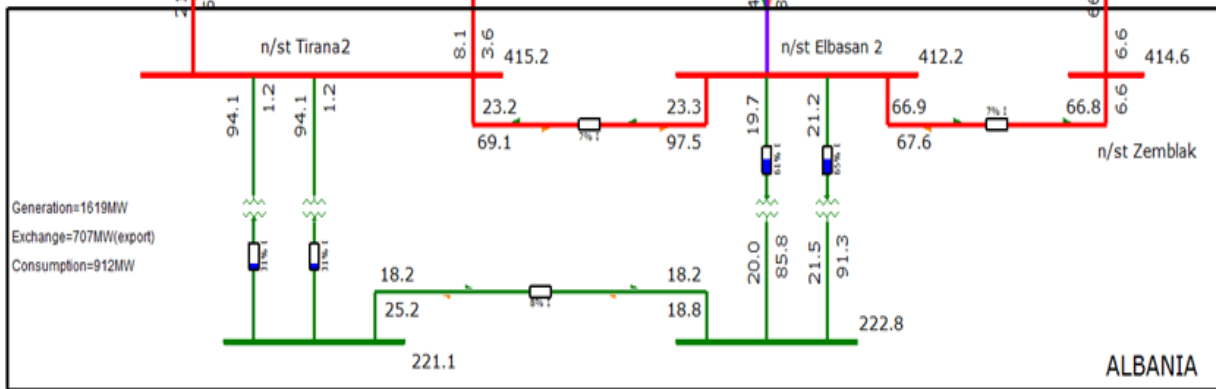
NTCimport=400MW



NTCimport=300MW



NTCimport=250MW



Benefits of Regional Market Coupling for SEE countries

- Increases system operational security and supply security through interconnection lines.
- Increases collaboration between SEE countries surpassing political barriers.
- Decreases the final energy prices because of increased competitiveness.
- Increases foreign investments opportunities in energy in SEE countries.
- Strengthens the national Power Markets.
- Increases the energy source diversification.
- Strengthens the SEE region position toward EU.

Thank you!

SKOPJE, SEPTEMBER 2019