



# Energy Market Integration and Transition in South-East Europe

Brussels

9 March 2018



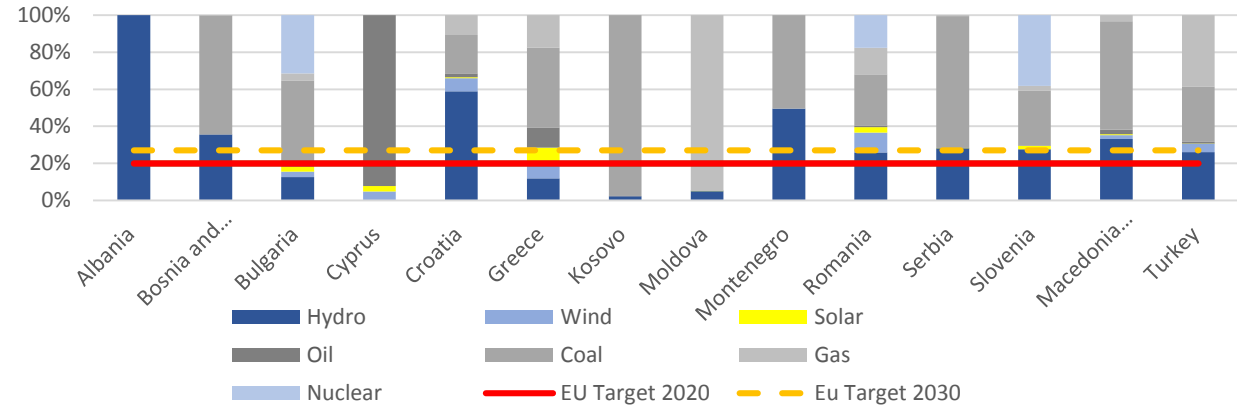
# Energy Mix



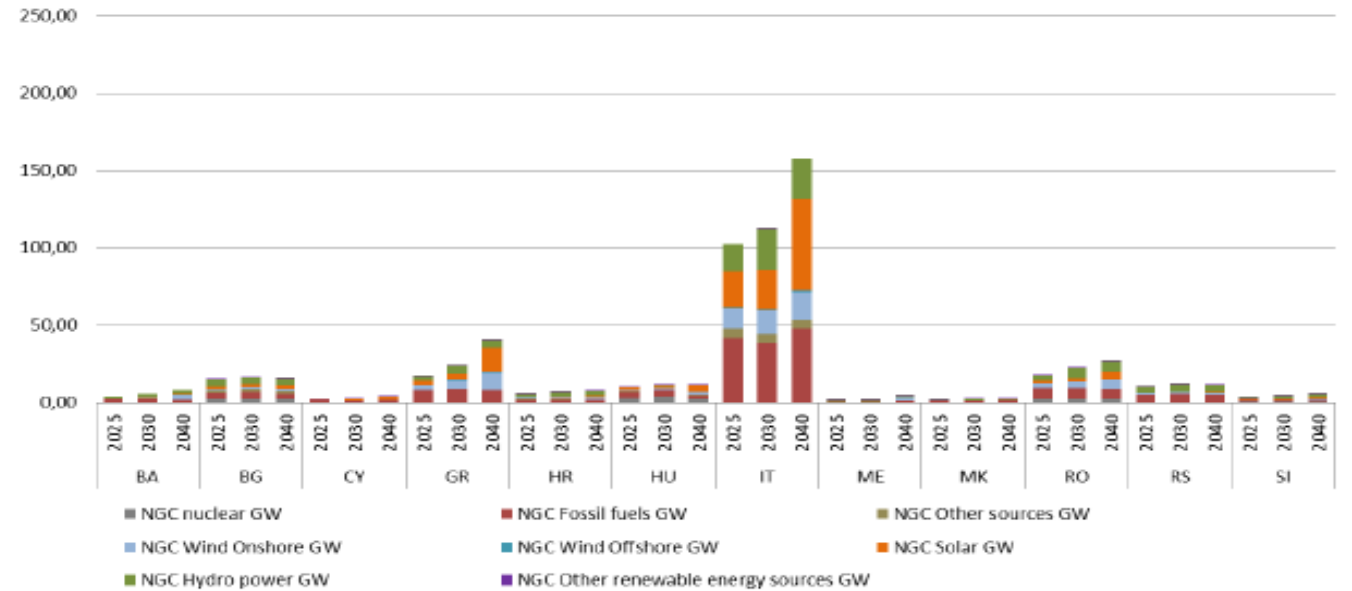
30% or more ELT generation from RES

Electricity generation still dependent on fossil fuels, need to invest more in Renewables

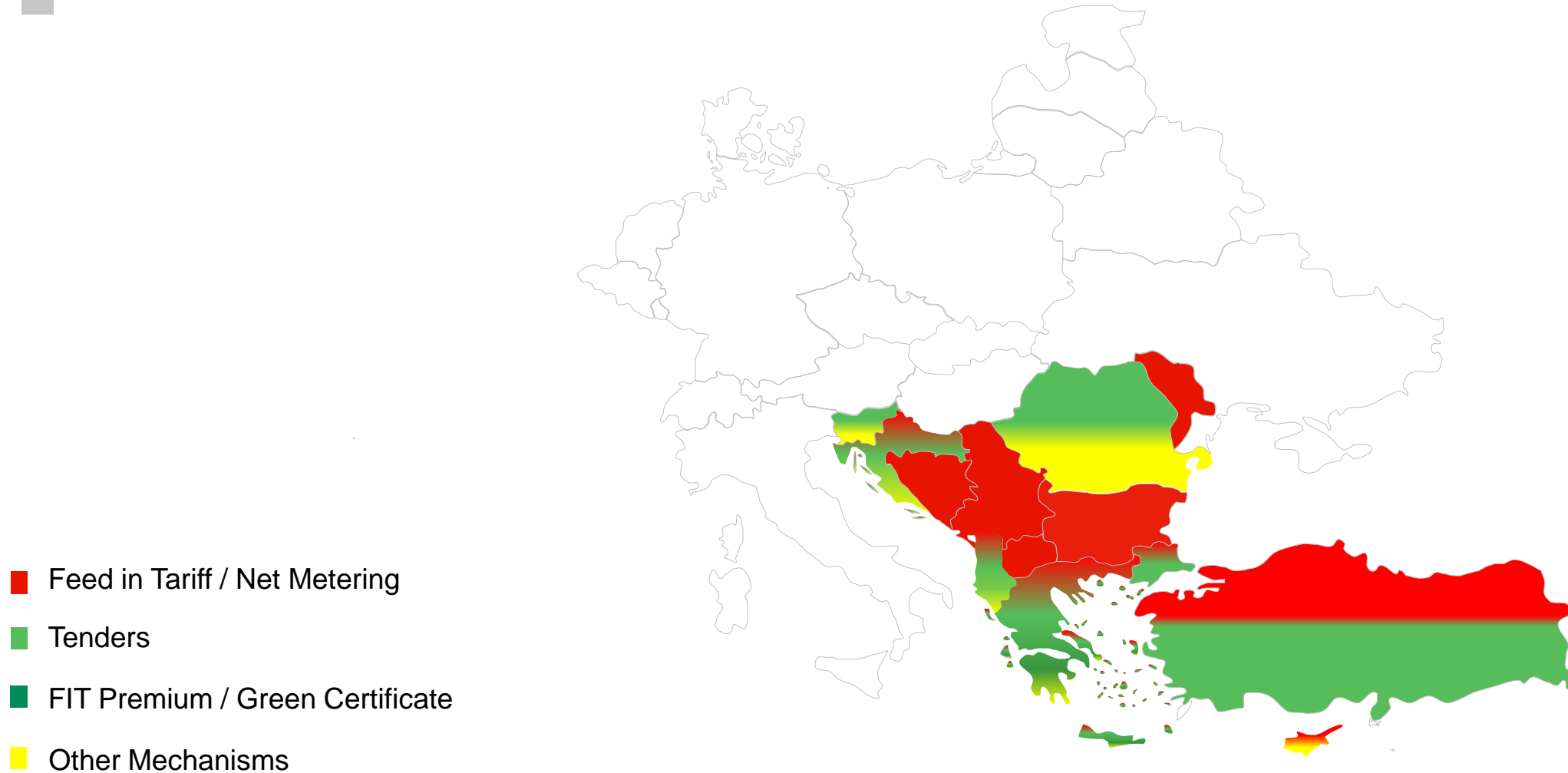
Energy mix in Selected Countries



2025 and Sustainable Transition (30/40)

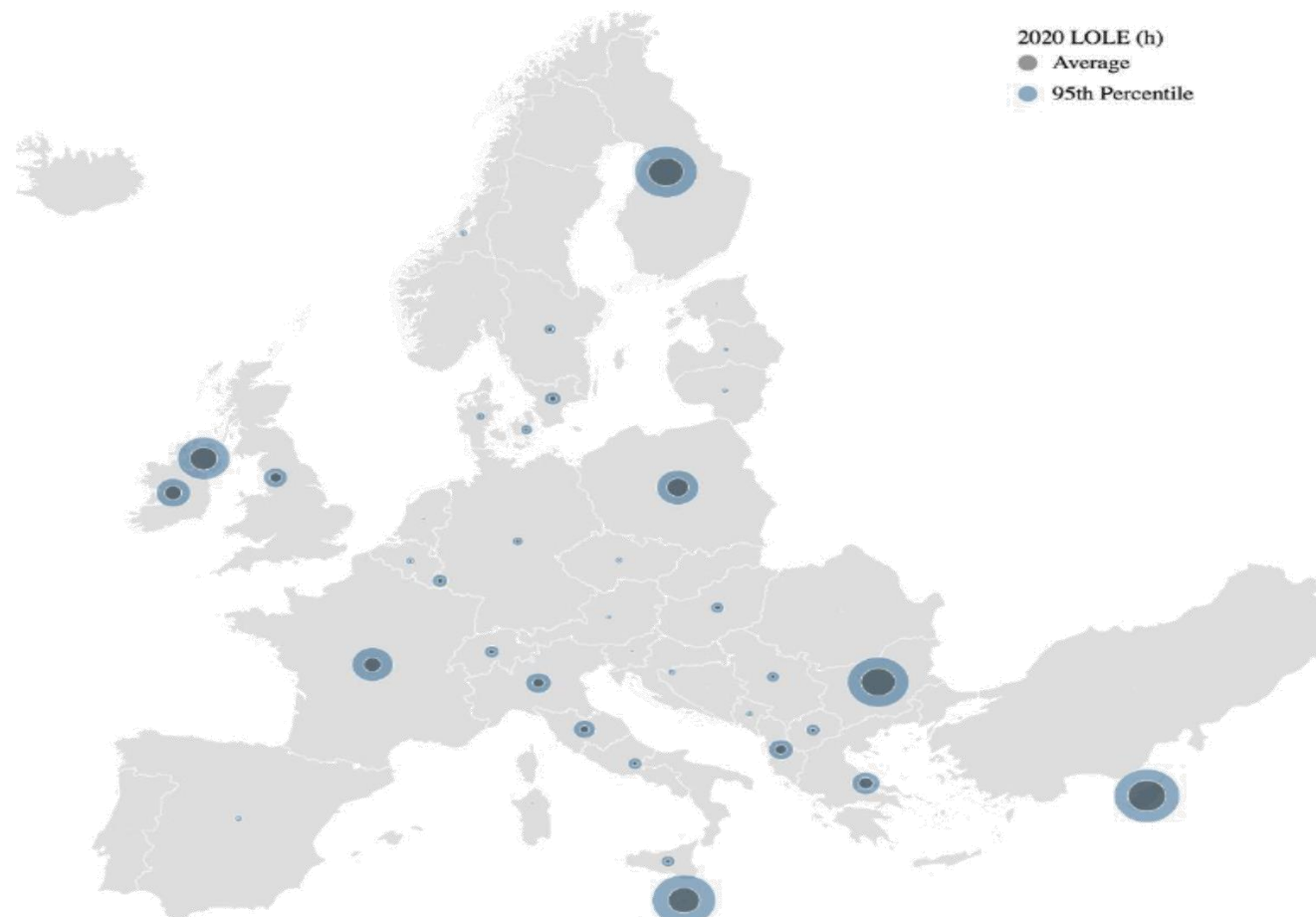
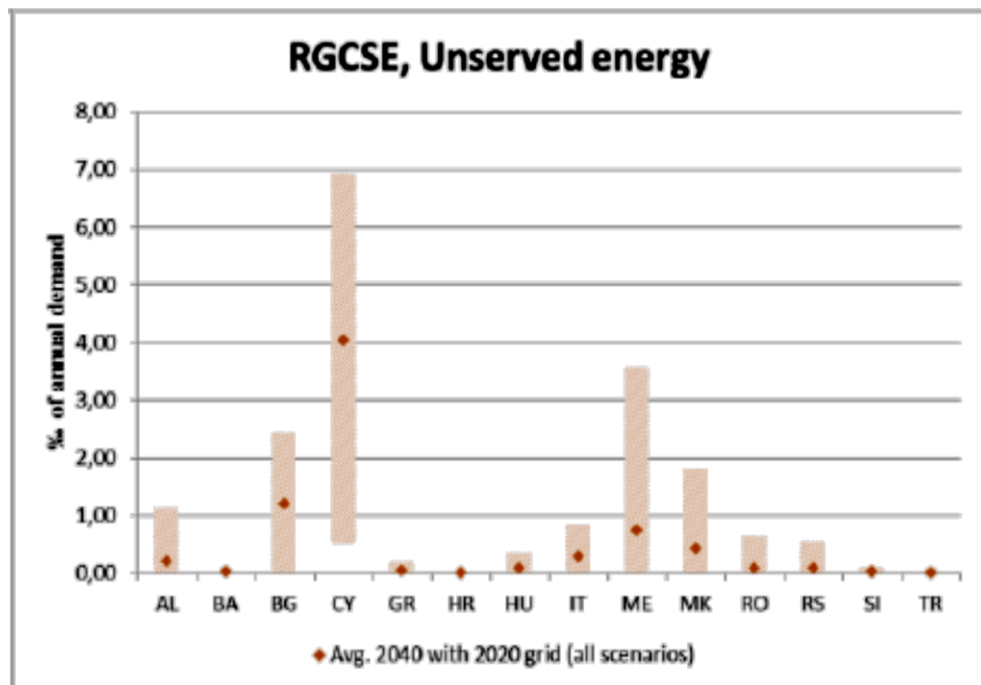


# Support Schemes in South-East Europe\*



\*Source: RES Legal

# Loss of Load Expectations



Investments in Security of Supply are necessary in order to keep the system safe.

# Loss of Load Expectations: also a Political Challenge



Since mid-January 2018 European Power System is facing continuous frequency deviations. Power deviations affected electric clocks, which are now delayed by close to six minutes. The missing energy amounts currently to 113 GWh

entsoe

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## [Press Release] Continuing frequency deviation in the Continental European Power System originating in Serbia/Kosovo: Political solution urgently needed in addition to technical.

Mar 6, 2018 -

ce ops

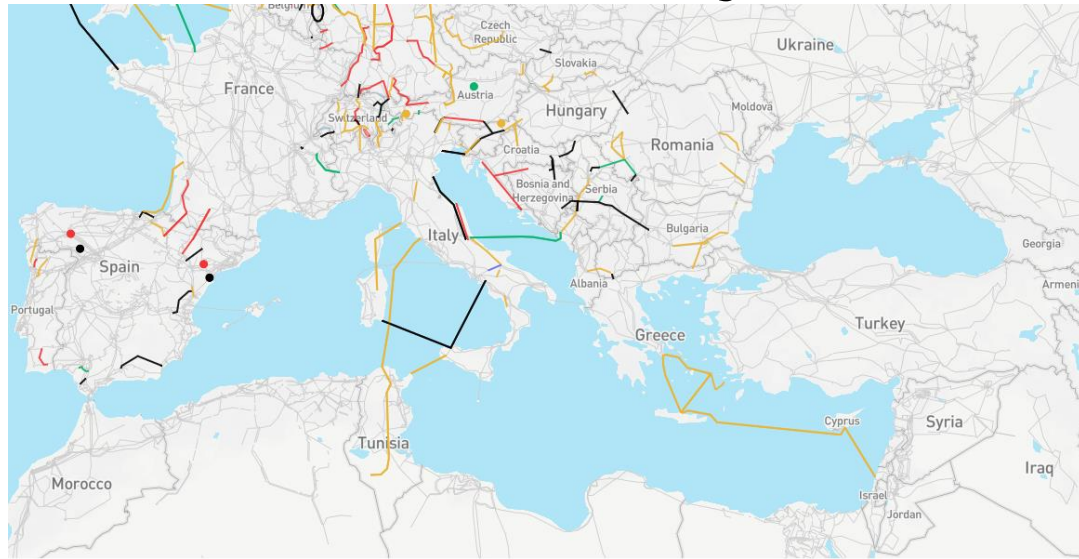
The Continental European (CE) Power System -a large synchronized area stretching from Spain to Turkey and from Poland to Netherlands; encompassing 25 countries- is experiencing a continuous system frequency deviation from the mean value of 50 Hz, and this since mid of January 2018.

The power deviations are originating from the control area called Serbia, Macedonia, Montenegro (SMM block) and specifically Kosovo and Serbia.

The power deviations have led to a slight decrease in the electric frequency average.

This average frequency deviation, that has never happened in any similar way in

# Interconnection Projects



Legend for Interconnection Projects:  
 Under Construction (Green) | In Permitting (Yellow) | Planned but not yet permitting (Red) | Under Consideration (Black) | Commissioned (Blue)

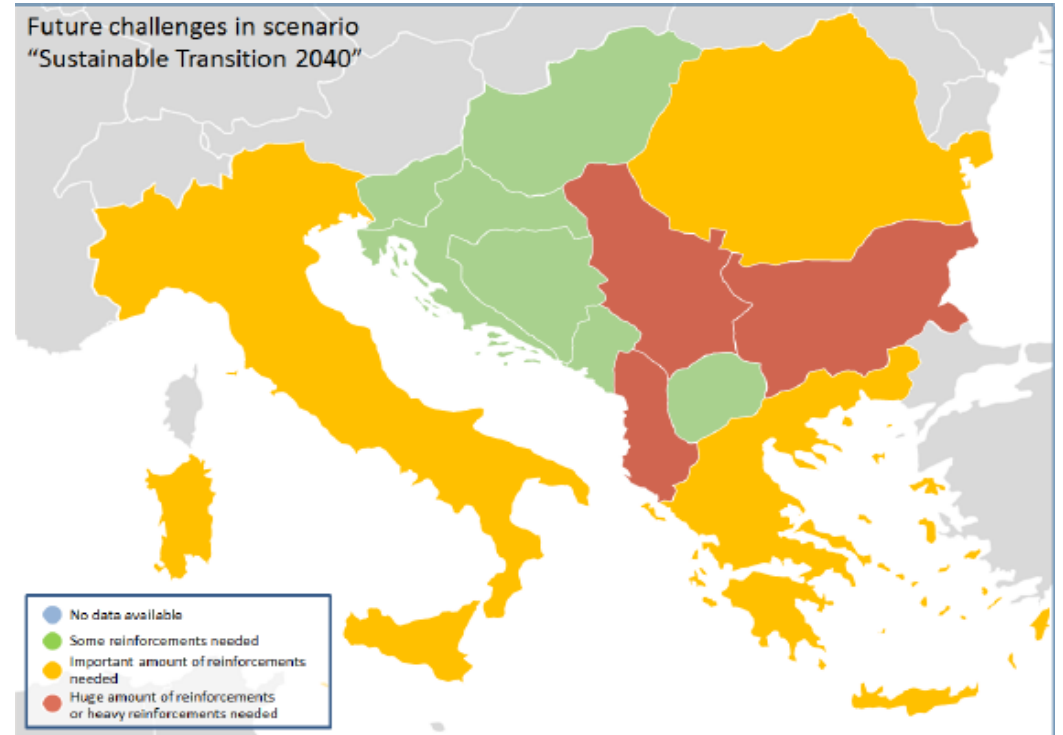
Future Challenges on borders CSE region



Legend for Future Challenges on borders CSE region:  
 No overload or occasional bottlenecks (Blue) | Structural bottlenecks in M-T (Yellow) | Bottlenecks in N (Red)



Future challenges in scenario "Sustainable Transition 2040"



Legend for Future Challenges in scenario "Sustainable Transition 2040":  
 No data available (Blue) | Some reinforcements needed (Green) | Important amount of reinforcements needed (Yellow) | Huge amount of reinforcements or heavy reinforcements needed (Red)

Investment in grids still needed