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DIRECTORATE-GENERAL FOR ENERGY AND TRANSPORT
DIRECTORATE C - Conventional Energies
The Director

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CORRIGENDUM

COMMISSION COMMUNICATION ON PROGRESS IN CREATING THE INTERNAL GAS AND ELECTRICITY MARKET, COM (2005) 568

AND TECHNICAL ANNEX, SEC(2005) 1445

Following the publication of the above reports, a number of updates and corrections have been provided to the Commission.

There follows a series of revised tables and charts to reflect these modifications. Corrections are shown in red bold type.

[signed]

Helmut Schmitt von Sydow
Director

TSO Unbundling Summary

	Electricity transmission	Gas transmission
Austria	legal	legal
Belgium	legal	legal
Denmark	ownership	ownership
Finland	ownership	
France	legal	legal
Germany	legal	partly legal
Greece	legal	
Ireland	legal	unbundling not implemented
Italy	ownership	legal
Luxembourg	legal	unbundling not implemented
Netherlands	ownership	ownership
Portugal	ownership	
Spain	ownership	legal
Sweden	ownership	ownership
UK	ownership	ownership
Norway	ownership	
Estonia	legal	unbundling not implemented
Latvia	legal	unbundling not implemented
Lithuania	ownership	unbundling not implemented
Poland	legal	legal
Czech Rep.	ownership	unbundling not implemented
Slovakia	legal	unbundling not implemented
Hungary	ownership	legal
Slovenia	ownership	legal
Cyprus		
Malta		

Table 1 Classification of Member States by degree of switching: electricity¹

Cumulative switching since market opening	Large Users	Industrial	Medium industrial/commercial	Small commercial/household
>50%	DK, FI, <u>IE</u> , SE, UK, NO, <u>IT</u>		BE , FI, UK, NO	NO
20-50%	AT, FR, DE, BE, <u>LU</u> , <u>HU</u>		<u>AT</u> , <u>IT</u> , <u>HU</u>	FI, UK, SE,
5-20%	ES, LT, PL, PT, CZ, SI		IE, DK, DE, <u>PT</u> , <u>BE</u>	IE, <u>NL</u> , DE, DK, <u>BE</u>
<5%	GR, EE, LV, SK		all others	all others

Source: regulators' submissions

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Table 2 Classification of Member States by degree of switching: gas²

Cumulative switching since market opening	Large users/plants	Industrial power	Medium industrial/commercial	Small commercial/household
>50%	IE, <u>ES</u> , UK		UK, <u>ES</u>	
20-50%	<u>DK</u> , <u>IT</u> , BE		BE , <u>IE</u> , <u>DK</u>	UK
5-20%	<u>AT</u> , FR, HU		<u>AT</u> , <u>BE</u> , FR, HU,	<u>BE</u> , <u>NL</u> ,
<5%	all others		all others	all others

Source: Regulators' submissions

¹ The estimates may, in some case, including switching between affiliates of the same Group of companies or simply imply a change from a standard regulated contract to an individually negotiated contract.

² The estimates may, in some case, including switching between affiliates of the same Group of companies

Table 2.1 Status of implementation of the labelling provisions

Summary of progress on labelling	
Austria	Implemented in July 2002 Eco-electricity Act
Belgium	FL: Implemented in regional government decisions in March 2002, modified Sept 2003, January 2004 WA: Not yet implemented, BRU: Not yet implemented
Denmark	Implemented in Law 494, June 2004
Finland	Regulation entered into force 1 July 2005
France	Implemented by Ministerial decree, 30 April 2004
Germany	Labelling included in new energy law of July 2005
Greece	No information available
Ireland	Implemented by statutory instrument No. 60 of 2005
Italy	Not yet implemented
Luxembourg	Not yet implemented
Netherlands	Article 95 of Dutch energy law, 20 July 2004
Portugal	Not yet implemented.
Spain	Not yet implemented.
Sweden	Ministerial Ordinance Sept 2005
UK	Implemented in Statutory Instrument no. 391 in force since 19 March 2005
Norway	no information
Estonia	Not yet implemented.
Latvia	Not yet implemented
Lithuania	Not yet implemented
Poland	Not yet implemented.
Czech R	Implemented in Energy Act, March 2005
Slovakia	Dealt with in main energy law.
Hungary	New legislation in preparation, not yet enforced.
Slovenia	Implemented in law of 11 April 2005
Cyprus	Not yet implemented
Malta	Dealt with in law no 511 of 2004

Table 3.3 Existence of Price Controls

	ELECTRICITY			GAS		
	Regulated tariffs - industrial users	Regulated tariffs - small commercial users	Regulated tariffs - households	Regulated tariffs - industrial users	Regulated tariffs - small commercial users	Regulated tariffs - households
Austria	N	N	N	N	N	N
Belgium	N	N	Y	N	N	Y
Denmark	Y	Y	Y	Y	Y	Y
Finland	N	N	Y*			
France	Y	Y	Y	Y	Y	Y
Germany	N	Y	Y	N	N	N
Greece	Y	Y	Y			
Ireland	Y	Y	Y	Y	Y	Y
Italy	Y	Y	Y	N	N	Y
Luxembourg	N	N	Y	N	N	N
Netherlands	N	N	N	N	N	N
Portugal	Y	Y	Y			
Spain	Y	Y	Y	Y	Y	Y
Sweden	N	N	N	N	N	N
UK	N	N	N	N	N	N
Norway	N	N	N			
Estonia	Y	Y	Y	N	N	Y
Latvia	Y	Y	Y	Y	Y	Y
Lithuania	Y	Y	Y	N	Y	Y
Poland	Y	Y	Y	Y	Y	Y
Czech Rep.	N	N	Y	N	Y	Y
Slovakia	N	N	Y	N	N	Y
Hungary	Y	Y	Y	Y	Y	Y
Slovenia	N	N	Y	N	Y	Y
Cyprus	Y	Y	Y			
Malta	Y	Y	Y			

Table 4.1 Wholesale Market Position – end 2004

	Number of companies with 5% share of production capacity	Share of largest 3 producers	Liquidity multiple spot trading/ total consumption	Liquidity multiple term trading/ total consumption
Austria	5	54%	3%	-
Belgium	2	95%	-	-
Denmark	10	40%	42%	450%
Finland	10	40%	42%	450%
France	1	96%	3%	-
Germany	5	72%	11%	64%
Greece	1	97%	-	-
Ireland	2	93%	-	-
Italy	5	65%	21%	-
Luxembourg	1	88%	4%	43%
Netherlands	4	69%	12%	37%
Portugal	3	76%	-	16%
Spain	3	74%	92%	-
Sweden	10	40%	42%	450%
UK	8	39%	6%	210%
Norway	10	40%	42%	450%
Estonia	1	95%	-	-
Latvia	1	95%	-	-
Lithuania	3	92%	-	-
Poland	7	45%	1%	44%
Czech Rep.	1	76%	1%	206%
Slovakia	1	86%	-	-
Hungary	7	66%	-	-
Slovenia	3	87%	2%	-

source: Regulators data

Notes:

1. Data for Sweden, Norway, Denmark, Finland relate to entire Nordic market

Table 4.2 Retail Market position – end 2004

	Companies with market share over 5%	Number of fully independent suppliers (no network affiliates)	Market share of largest 3 companies large industrial users	Market share of largest 3 companies small/medium businesses	Market share of largest 3 companies very small commercial/household
Austria	5	4	60%		
Belgium	3 / 2	14 / 6	100% / 92%	100% / 99%	94% / 100%
Denmark	-	3	-	-	-
Finland	5	< 5	-	35-40 %	
France	1	20	91%	97%	96%
Germany	4	13	-	-	-
Greece	1	10	97%	97%	100%
Ireland	3	7	99%	99%	99%
Italy	6	119	33%	12%	93%
Luxembourg	4	4	94%		95%
Netherlands	3	18	-	-	83%
Portugal	2	4	98%		
Spain	5	20	82%	86%	85%
Sweden	3	-	50%		
UK	6	3	65%	66%	59%
Norway	4	5	95%	33%	31%
Estonia	1	0	95%	95%	95%
Latvia	1	0			
Lithuania	3	5	100%	100%	100%
Poland	6	20	50%	48%	47%
Czech Rep.	3	0	95%		
Slovakia	1	1	86%	100%	100%
Hungary	7	0	7%	43%	51%
Slovenia	6	6	67%	75%	77%
Cyprus	1	0	100%	100%	100%
Malta	1	0	100%	100%	100%

source: Regulators data

Notes:

1. Belgium data Flanders\Wallonia. No data for Brussels region
2. Norway data from 2003
3. Germany: source for "fully independent suppliers" from the new entrant group "BNE".

Table 5.1 Market Structure in Import and Production of Gas – Position end 2004

	Total consumption (bcm/year)	Number of companies with 5% share of production/import capacity	Number of companies with 5% share of available gas	Share of 3 largest gas shippers in wholesale market	Liquidity multiple spot trading/ total consumption	Liquidity multiple term trading/ total consumption
Austria	9	2	4	80%	3%	-
Belgium	17	2	2	-	229%	-
Denmark	4	2	2	97%	-	-
France	45	2	2	98%	-	-
Germany	102	5	10	ca. 80%	-	-
Ireland	4	5	5	84%	-	-
Italy	80	3	3	62%	-	7%
Luxembourg	1	1	-	-	-	-
Netherlands	48	1	1	85%	5%	175%
Spain	27	4	4	73%	-	-
Sweden	1	1	5	78%	-	-
UK	105	7	7	36%	10%	540%
Estonia	1	1	-	100%	-	-
Latvia	2	1	1	100%	-	-
Lithuania	3	4	-	92%	-	-
Poland	8	1	1	100%	-	-
Czech Rep.	10	-	-	-	-	-
Slovakia	6,5	1	1	-	-	-
Hungary	14	2	1	100%	-	-
Slovenia	1	1	1	100%	-	-

source:
Regulators
data

Table 5.2 Structure of Gas supply market – position end 2004

	Companies with market share over 5%	Number of fully independent suppliers (no network affiliates)	Market share of largest 3 companies power plants	Market share of largest 3 companies large industrial users	Market share of largest 3 companies small/medium businesses	Market share of largest 3 companies very small commercial/house hold
Austria	4	6	-	-	-	-
Belgium	3/5	12 / 8	-	100% / 90%	100% / 99%	99% / 100%
Denmark	3	2	100%	92%	100%	100%
France	3	6	-	-	-	-
Germany	1	9	-	-	-	-
Ireland	3	8	91%	100%	100%	100%
Italy	5	110	80%	54%	-	33%
Luxembourg	4	1	99%	95%	93%	93%
Netherlands	3	5	-	-	-	83%
Spain	5	4	-	72%	77%	90%
Sweden	-	-	-	-	-	-
UK	6	8	56%	53%	61%	77%
Estonia	1	1	85%	100%	100%	100%
Latvia	1	0	-	100%	100%	100%
Lithuania	2	0	-	100%	100%	100%
Poland	7	0	100%	-	-	-
Czech Rep.	7	0	-	54%	51%	57%
Slovakia	1	0	100%	100%	100%	100%
Hungary	7	0	95%	77%	76%	79%
Slovenia	6	0	-	-	-	-

source:

Regulators data

Notes:

1. Belgium data Flanders\Wallonia. No data for Brussels region

Table 6.1 Regulated companies and access charges

	Number of regulated transmission companies	Number of regulated distribution companies	Approx network tariff large users €/MWh	Approx network tariff low voltage commercial €/MWh	Approx network tariff low voltage household €/MWh
Austria	3	133	10	51	53
Belgium	1	26	11	-	51
Denmark	10	120	19	25	48
Finland	1	91	10	26	37
France	1	161	12	40	48
Germany	4	950	9	53	62
Greece	1	1	8	-	-
Ireland	1	1	-	48	50
Italy	1	173	9	41	67
Luxembourg	2	10	7	62	72
Netherlands	1	12	-	-	40
Portugal	3	13	4	39	37
Spain	1	313	69	34	33
Sweden	1	184	10	17	40
UK	3	17	5-12	11-23	17-34
Norway	1	170	11	25	-
Estonia	1	42	11	31	40
Latvia	1	8	-	-	-
Lithuania	1	2	6	23	42
Poland	1	14	13-26	48-88	37-50
Czech Rep.	1	327	3	-	36
Slovakia	1	3	6	17	37
Hungary	1	6	2	48	30
Slovenia	1	5	8	38	31
Cyprus	0	1	-	-	-
Malta	0	1	-	-	-

source: Regulators data

1. General: data excludes levies related to, for example PSOs and renewables or CHP promotion.
2. Germany: the category Ib is not typical of commercial customers of this size (annual load 1000 hours)
3. In Italy there are 10 companies owning a share of the national transmission network.

Table 6.4 Regulated companies and access charges

	Number of regulated transmission companies	Number of regulated distribution companies	Approx network tariff large users €/MWh	Approx network tariff medium commercial €/MWh	Approx network tariff small commercial/household €/MWh
Austria	5	19	n.a.	8	12
Belgium	1	19	2	6	12
Denmark	1	4	4	13	13
France	2	22	2	9	14
Germany	23	686	-	-	-
Ireland	1	1	3	14	17
Italy	2	480	2	9	12
Luxembourg	1	4	1	6	7
Netherlands	1	12	-	-	5
Spain	9	25	3	12	23
Sweden	2	7	-	-	-
UK	1	8	2	5	6
Estonia	1	20	1	5	5
Latvia	1	1	-	-	-
Lithuania	1	6	4	6	6
Poland	2	62	5	11	11
Czech Rep.	1	134	-	-	-
Slovakia	1	1	-	-	-
Hungary	1	11	3	4	7
Slovenia	1	17	2	-	-

source:
Regulators
data

P79 Table 7.1 Unbundling of Network Operators: Electricity Transmission

	Legal unbundling implemented?	Separate Headquarters (Y/N)	Separate corporate presentation (Y/N)	Unbundled regulatory accounts with guidelines (Y/N)	Audit of unbundled accounts (Y/N)	Publication of unbundled accounts (Y/N)	Separate board of Directors without Directors from other group companies? (Y/N)	Total rating out of 6
Austria	yes	partly	Y	N	Y	Y	Y	5
Belgium	yes	Y	Y	Y	Y	Y	N	5
Denmark	yes and ownership	Y	Y	Y	Y	Y	Y	6
Finland	yes: state overlap	Y	Y	Y	Y	Y	Y	6
France	yes: state overlap	Y	Y	Y	Y	Y	N	5
Germany	yes	N	N	Y	Y	N	Y	3
Greece	yes: state overlap	Y	Y	N	Y	N	N	3
Ireland	yes: state overlap	Y	Y	Y	Y	Y	Y	6
Italy	yes and ownership	Y	Y	Y	Y	Y	Y	6
Luxembourg	yes	N	partly	N	Y	Y	N	3
Netherlands	yes and ownership	Y	Y	Y	Y	Y	Y	6
Portugal	yes and ownership	Y	Y	Y	Y	Y	Y	6
Spain	yes and ownership	N	Y	Y	Y	N	N	3
Sweden	yes: state overlap	Y	Y	Y	Y	Y	Y	6
UK	yes and ownership	Y	Y	Y	Y	Y	Y	6
Norway	yes: state overlap	Y	Y	Y	Y	Y	Y	6
Estonia	yes	Y	Y	Y	Y	Y	Y	6
Latvia	yes	Y	Y	Y	Y	Y	N	5
Lithuania	yes: state overlap	Y	Y	Y	Y	Y	Y	6
Poland	yes: state overlap	Y	Y	N	Y	Y	Y	5
Czech Rep.	yes: state overlap	Y	Y	Y	N	N	Y	4
Slovakia	yes: state overlap	Y	Y	N	N	N	N	2
Hungary	yes: state overlap	N	N	N	Y	Y	N	2
Slovenia	yes: state overlap	Y	Y	Y	Y	Y	Y	6
Cyprus	no	Y	N	Y	N	N	N	2
Malta	-	-	-	-	-	-	-	-
Total Compliance / 26	24	21	22	19	22	19	16	

Table 7.2 Unbundling of Network Operators: Electricity Distribution

	Legal unbundling implemented?	Separate Headquarters (Y/N)	Separate corporate presentation (Y/N)	Unbundled regulatory accounts with guidelines (Y/N)	Audit of unbundled accounts (Y/N)	Publication of unbundled accounts (Y/N)	Separate board of Directors without Directors from other group companies? (Y/N)	Total rating out of 6
Austria	no	N	partly	N	Y	Y	partly	3
Belgium	yes	Y	Y	Y	Y	Y	N	5
Denmark	yes	partly	partly	Y	Y	Y	partly	4
Finland	yes	N	N	Y	Y	Y	N	3
France	no	N	N	Y	Y	Y	N	3
Germany	no	N	N	Y	Y	N	Y	3
Greece	no	N	N	N	Y	N	N	1
Ireland	no	N	Y	Y	Y	Y	N	4
Italy	see note	N	N	Y	Y	N	N	2
Luxembourg	no	N	N	N	partly	partly	N	1
Netherlands	yes	N	Y	Y	Y	Y	N	4
Portugal	see note	Y	N	Y	Y	Y	N	3
Spain	see note	N	Y	Y	Y	Y	N	4
Sweden	yes	N	N	Y	Y	Y	N	3
UK	yes	partly	partly	Y	Y	Y	partly	5
Norway	yes	N	partly	Y	Y	Y	N	4
Estonia	yes	Y	Y	Y	Y	Y	Y	6
Latvia	no	N	N	Y	Y	N	N	2
Lithuania	yes	Y	Y	Y	Y	Y	Y	6
Poland	no	N	N	N	N	N	N	0
Czech Rep.	no	N	N	Y	N	N	N	1
Slovakia	no	Y	Y	N	N	N	N	2
Hungary	see note	N	N	N	Y	Y	N	2
Slovenia	no	N	N	Y	Y	Y	N	3
Cyprus	no	N	N	Y	N	N	N	1
Malta	no	N	N	in progress	N	N	N	1
Total Compliant	9	7	11	19	21	17	6	

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Table 7.3 Unbundling of gas transmission system operators

	Legal unbundling implemented?	Separate Headquarters (Y/N)	Separate corporate presentation (Y/N)	Unbundled regulatory accounts with guidelines (Y/N)	Audit of unbundled accounts (Y/N)	Publication of unbundled accounts (Y/N)	Separate board of Directors without other group companies? (Y/N)	Total rating out of 6
Austria	yes	Y	Y	N	N	N	Y	3
Belgium	yes	Y	Y	Y	Y	Y	N	5
Denmark	yes and ownership	Y	Y	Y	Y	Y	Y	6
France	yes: state overlap	Y	Y	Y	Y	Y	Y	6
Germany	partly	N	N	Y	Y	N	Y	3
Ireland	no	N	N	N	N	Y	N	1
Italy	yes and ownership	Y	Y	Y	Y	N	Y	5
Luxembourg	no	N	N	Y	Y	N	N	2
Netherlands	yes and ownership	Y	Y	Y	Y	Y	Y	6
Spain	yes	N	Y	N	Y	Y	N	3
Sweden	yes and ownership	Y	Y	Y	Y	Y	Y	6
UK	yes and ownership	Y	Y	Y	Y	Y	Y	6
Estonia	no	N	N	Y	N	N	N	1
Latvia	no	N	N	N	Y	N	N	1
Lithuania	no	N	N	Y	Y	N	N	2
Poland	yes	Y	Y	N	Y	Y	N	4
Czech Rep.	no	N	N	Y	N	N	N	1
Slovakia	no	N	Y	N	N	N	N	1
Hungary	yes	Y	partly	N	Y	Y	Y	5
Slovenia	yes	Y	Y	Y	Y	Y	Y	6

Total Compliance / 20	12	11	13	13	15	11	10	
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Table 7.3 Unbundling of gas distribution system operators

	Legal unbundling implemented?	Separate Headquarters (Y/N)	Separate corporate presentation (Y/N)	Unbundled regulatory accounts with guidelines (Y/N)	Audit of unbundled accounts (Y/N)	Publication of unbundled accounts (Y/N)	Separate board of Directors without Directors from other group companies? (Y/N)	Total rating out of 6
Austria	yes	partly	partly	N	N	N	partly	2
Belgium	yes	Y	Y	Y	Y	Y	N	5
Denmark	yes	N	partly	Y	Y	Y	Y	5
France	no	Y	N	Y	Y	N	Y	4
Germany	no	N	N	Y	Y	N	Y	3
Ireland	no	N	N	N	N	Y	N	1
Italy	yes	N	N	Y	Y	N	N	2
Luxembourg	no	N	N	N	partly	N	N	1
Netherlands	yes	N	Y	N	N	Y	N	2
Spain	see note	N	Y	N	N	N	N	1
Sweden	no	N	N	Y	Y	Y	N	3
UK	yes and ownership	Y	Y	Y	Y	Y	Y	6
Estonia	no	N	N	Y	N	N	N	1
Latvia	no	N	N	N	Y	N	N	1
Lithuania	no	N	N	Y	Y	N	N	2
Poland	no	N	N	N	N	N	N	0
Czech Rep.	no	N	N	Y	N	N	N	1
Slovakia	no	N	Y	N	N	N	N	1
Hungary	no	N	N	N	Y	Y	N	2
Slovenia	no	N	N	Y	Y	N	N	2
Total Compliance	6	4	7	11	12	7	5	

Table 9.1 Member States with low levels of interconnection

	Installed generation capacity (GW) ³	Import capacity <u>NTC</u> ⁴ (GW)	Import capacity as % of installed capacity	Projects to improve interconnection	Current Status
Italy	80	6.0	8%	San Fierano- Robbia	complete
Portugal	12	1.1	9%	Balboa-Sines Duroro internacional Minho Algarve	complete in progress proposed proposed
Spain	56	2.2	4%	Balboa-Sines Baixas-Bescano	complete delayed
UK	80	2.3	3%	UK-NL DC link	proposed
Ireland	5	0.3	6%	second ROI-NI GB-ROI DC link	agreed proposed
Poland	34	3.4	10%	Poland - Lithuania	no progress
Baltic States (collectively)		0.0	0%	Estlink Poland - Lithuania	in progress no progress

³ UCTE July 2003 forecast, Nordel winter 2003-4 forecast, NGCand ESBNG 7 year statement.

⁴ Based on ETSO Winter 2004-05 NTC data, includes capacity from Switzerland and South East Europe, excludes Morocco Ukraine and Russia

Table 10.1 Electricity Security of Supply

MW	Peak demand recorded (date)	winter/summer peak	Total generation capacity	“Remaining capacity” UCTE definition 2006 forecast	“Remaining capacity” UCTE definition 2007 forecast
	A	b	c		
Austria ⁵	8 962 (16/12/04)	W	18 300	55%	
Belgium	13 708 (20/12/04)	W	14 600	-5%	
Denmark	6 480(?)	W	12 710	-	
Finland	14 040 (02/01/03)	W	16 488	-	
France	86 000 (21/02/05)	W	112 900	13%	
Germany	77 200 (16/12/05)	W	114 800	10%	
Greece	9 510 (02/08/05)	S	11 000	-3%	
Ireland	4 528 (20/12/04)	W	6 400	-	3%
Italy	54 100 (28/06/05)	S	90 800	13%	6%
Luxembourg	994 (18/11/04)	W	1 700	75%	
Netherlands	15 601 (21/12/04)	W	21 100	5%	
Portugal	8 261 (09/12/05)	W	11 800	17%	
Spain	43 708 (27/01/05)	S	64 800	18%	
Sweden	27 000 (22/01/04)	W	33 551	-	
UK	54 100 (13/12/04)	W	75 700	-	3%
Norway	23 050 (05/02/01)	W	28 327	-	
Estonia	1 475 (?)	W	2 200		
Latvia	1 234 (?)	W	2 164		
Lithuania	2 000 (?)	W	5 000		
Poland	21 146 (23/12/04)	W	32400	30%	
Czech R	10 157 (16/12/04)	W	16 300	29%	
Slovakia	4 319 (16/12/04)	W	7 700	2%	
Hungary	6 012 (15/12/04)	W	7 800	6%	
Slovenia	2 006 (25/11/04)	W	2 900	6%	
Cyprus	-	S			
Malta	-	S			
NB: REGIONAL DATA					
UCTE main					10%
Spain+Port					10%
Centrel					16%
Nordel					2%

Source: ETSO, UCTE and Nordel Power Balance forecasts

⁵ High levels of reserve capacity reported result from inclusion of storage plant capacity of some 6,4 GW.

