Retail Market

INFORMATION ABOUT THE RESPONDENTS	
Are you responding to this questionnaire on behalf of/as: -single choice reply-(compulsory)	Organisation
Please enter your name or the name of your company/organisation -open reply-(compulsory)	Aiget (www.aiget.org)
Please indicate your principal country or countries of residence or activity -multiple choices reply-(compulsory)	Italy
What is your role in the energy market? -single choice reply-(optional)	Other
Please specify your role -open reply-(optional)	Association of energy traders and retailers
How would you prefer your contribution to be published on the Commission website, if at all? -single choice reply-(compulsory)	Anonymously (I consent to publication of all information in my contribution and I declare that none of it is under copyright restrictions that prevent publication)
I. GENERAL FUNCTIONING OF THE RETAIL MARKET AND CONSUMER PARTICIPATION	
a) Well-functioning wholesale market -single choice reply-(optional)	Very important
b) Customer choice between competing offers -single choice reply-(optional)	Important
c) Easy access to technology such as smart meters or appliances -single choice reply-(optional)	Important
d) Secure access to more detailed energy consumption data -single choice reply-(optional)	Very important
e) Easy access to demand response services -single choice reply-(optional)	Important
f) Easy access to energy efficiency services -single choice reply-(optional)	Important
g) Strong consumer protection -single choice reply-(optional)	Important
h) Market-based consumer prices -single choice reply-(optional)	Unimportant
i) Regulated consumer prices -single choice reply-(optional)	Unimportant
j) Transparent contracts and bills -single choice reply-(optional)	Important
k) Bill reflecting real instead of estimated consumption -single choice reply-(optional)	Very important

l) Light permitting and grid connection procedures for self-production -single choice reply-(optional)	Unimportant
m) Right to sell excess energy -single choice reply-(optional)	Unimportant
n) Protection against misleading selling methods and practices -single choice reply-(optional)	Important
o) Protection of vulnerable consumers -single choice reply-(optional)	Important
p) Independent and competent National Regulatory Authority -single choice reply-(optional)	Very important
2. Are there other factors which would enable residential consumers and SMEs to better control their energy consumption and costs? -open reply-(optional)	
Less charges not directly related to energy consumption and more liberalization regarding bills schemes and models	
3. ACER/CEER Annual Report concludes that consumers are dissatisfied with the information they receive in their contract and in their billing information. The report also shows the frequency with which consumers switch from one energy supplier to another. This varies between 0% to 14,8% in the EU Member States. In your opinion, what are the key factors that influence switching rates? -multiple choices reply-(optional)	Prices and tariffs are too difficult to compare due to a lack of tools and/or due to contractual conditions - Switching offers insufficient benefits - Unfair commercial practices such as misleading branding and communication strategies applied by integrated DSO/retail suppliers
a) Include standardised minimum information in commercial offers for easier comparison -single choice reply-(optional)	Neutral
b) Ensure the availability of web-based price comparison tools -single choice reply-(optional)	Neutral
c) Ensure consumers are aware of their rights -single choice reply-(optional)	Agree
d) Develop further rights for consumers -single choice reply-(optional)	Disagree
e) There is no need to encourage switching -single choice reply-(optional)	Disagree
4.1. Please feel free to develop further your choices about consumers and energy supplier -open reply-(optional)	
Consumers should gradually be able to compare offers and tariffs. The comparison is possibile if bills are simple and this is not always the case with minum standard requirements	
5. With the implementation of related provisions in the Energy Efficiency Directive by December 2014, consumers can be billed on the basis of their actual energy consumption and have the	Yes

right to access their actual and historical consumption data. Do you think that bills provide consumers with sufficient information about their consumption patterns? -single choice reply-(optional)	
6. If you were able to receive more detailed information on your energy consumption, do you think this would affect your consumption patterns? -single choice reply-(optional)	Yes
7. In your opinion, which of the following factors will be the main drivers of future developments in the retail market? -multiple choices reply-(optional)	Smart meters and smart grids - Data management - Local autonomy due to decentralised generation
8. My reply to the previous question concerns the following Member State(s) -multiple choices reply-(optional)	Italy
II. MARKET DESIGN	
9. In your opinion, is the level of competition in retail energy markets appropriate? -single choice reply-(optional)	No, there is too little
Why do you think there is too little competition? -multiple choices reply-(optional)	Market dominance by a few market actors - Regulation of consumer prices
10. My reply to the previous question (9) concerns the following Member State(s) -multiple choices reply-(optional)	Italy
11. Market functioning and the degree of competition are also determined by impartial operation of the networks and therefore by the independence of network operators from commercial retailers of energy. DSOs have a specific role in their key task of distributing energy. Some DSOs belong to vertically integrated companies that have departments selling energy and/or providing other types of commercial services in the retail market. In your view should: -single choice reply-(optional)	The role of DSO be limited to balancing and distribution of energy through the grid?
12. In your opinion, which of the following task(s) should DSOs carry out? -multiple choices reply-(optional)	Data management - Balancing of the local grid, including distributed generation and demand response - Connection of new generation/capacity (e.g. solar panels) - Curtailment on the basis of a contract and against reward
13. In your opinion, what are the requirements for DSOs to efficiently fulfil their tasks that you identified above? -multiple choices reply-(optional)	Good regulatory oversight - Independence from supply activities - Clear definition of the DSO's relationship with suppliers - Clear definition of the DSO's relationship with consumers

14. The provisions in existing EU legislation aimed at achieving network operators' independence include the requirement of a clear separation of the visual identities (distinct branding) of the opearators of distribution networks (DSO) and commercial retailers in order to avoid any consumer confusion. This is particularly relevant in cases where the network operators are owned by businesses that also offer retail supply services on a commercial basis. How clearly are the distribution and retail branches of vertically integrated companies in your country separated in visual branding terms? -single choice reply-(optional)	Not clearly
a) Billing -single choice reply-(optional)	
b) Data management -single choice reply-(optional)	Yes
c) Balancing of the local grid -single choice reply-(optional)	Yes
d) Distributed generation -single choice reply-(optional)	Yes
e) Demand response -single choice reply-(optional)	Yes
f) Connection of new generation/capacity (e.g. solar panels) -single choice reply-(optional)	
g) Curtailment on the basis of a contract and against reward -single choice reply-(optional)	
h) Other -single choice reply-(optional)	Yes
Please specify which other roles -open reply-(optional)	
We think brand unbundling, regulated tariffs scope, social tariffs may have a common logic at EU level	
16. In line with the spirit of existing legislation, the principle of the consumer owning his or her energy consumption data is promoted. Allowing other parties to have access to such consumption data in an appropriate and secure manner, subject to the consumer's explicit agreement, is a key enabler for the development of new energy services for consumers. The manager of energy consumption data must share the data with the market actors in a non-discriminatory and safe fashion. -single choice reply-(optional)	Agree

17. In your view, which of the following entities should manage the consumption data flows? -multiple choices reply-(optional)	Consumer or a market actor designated by the consumer - Entity independent from DSOs, ESCOs, suppliers and other market actors - DSO
a) The tariffs should be time-differentiated to enable demand response -single choice reply-(optional)	Agree
b) The tariffs should be measurable -single choice reply-(optional)	Agree
c) The cost breakdown of tariffs should be transparent -single choice reply-(optional)	Agree
d) The methodology to calculate the tariffs should be transparent -single choice reply-(optional)	Agree
e) The tariffs should be favourable for distributed generation -single choice reply-(optional)	Agree
f) The principles to determine network tariffs should be the same for both distribution and transmission to avoid distortion -single choice reply-(optional)	Neutral
g) European wide principles for setting distribution network tariffs are needed -single choice reply-(optional)	Agree
19. Internal Energy Market legislation foresees that Member States designate DSOs for a period of time to be determined by them and having regard to efficiency and economic balance. In this context the operation of distribution networks may be measured against cost efficiency, long-term sustainability and consumer interest. In Member States where the DSOs do not own the network; the awarding of concession to operate distribution networks varies but must be governed by the principle of non–discrimination and public procurement legislation. If applicable, do you view the procedure for awarding concessions for gas and electricity distribution in your country as adequate? -single choice reply-(optional)	Yes
20. In your opinion, a suitable period of time for a concession contract would be: -single choice reply-(optional)	20 years
a) Taking autonomous decisions in its regulatory duties concerning retail energy markets and	Good

their actors (DSOs, energy service companies, consumers) independently from any political body or other public or private entity -single choice reply-(optional)	
b) Helping to ensure consumer protection in the energy market -single choice reply-(optional)	Good
c) Fixing or approving distribution tariffs or their methodologies -single choice reply-(optional)	Good
d) Monitoring the level and effectiveness of market opening and competition at retail level -single choice reply-(optional)	Good
e) Reacting to occurrences of contractual practices restricting the freedom of consumers to contract more than one energy supplier -single choice reply-(optional)	Good
f) Bringing cases of distortion of competition before the competent competition authorities -single choice reply-(optional)	Poor
g) Efficiency -single choice reply-(optional)	Good
22. Does the NRA in your country (in your view) have sufficient resources to fulfil its role? -single choice reply-(optional)	Yes
III. DEMAND-SIDE PARTICIPATION AND SMART USE OF ENERGY	
23. Advances in innovation have enabled a broad range of distributed generation and demand response technologies for industrial, commercial (including small businesses) and residential consumers to control their consumption and to help balance the grid while decreasing dependency on energy supply from other sources. Energy efficiency, demand response, self-generation, auto-consumption and local storage go hand-in-hand in this respect. Do you think that consumers have the information they need to use energy more efficiently? -single choice reply-(optional)	No
a) Real-time data through metering equipment -single choice reply-(optional)	A lot
b) Historical data graphics or graphics that compare similar household consumption patterns -single choice reply-(optional)	A little
c) In-home displays visualising metering	A lot

information -single choice reply-(optional)	
d) More frequent and informative billing -single choice reply-(optional)	A lot
24. Are there other information sources that could improve energy efficient behaviour? Please specify. -open reply-(optional)	
25. Energy service companies (ESCOs) are businesses that design and implement integrated energy solutions, including energy supply, energy conservation and financing. They can facilitate favourable contractual arrangements for consumers and provide information that can be used by consumers to achieve better prices (e.g. in demand response programmes). Energy services - specifically in the context of energy efficiency - are services that can deliver measurable energy efficiency improvements on the basis of a contract between energy service providers and consumers. They can also help finance initially high investment costs against the cost benefits over time (e.g. through contracting). Do you think there is sufficient choice of energy efficiency services in your country? -single choice reply-(optional)	Yes
26. Is it easy for energy service companies to start operating in your country? -single choice reply-(optional)	Yes
27. Do you think that more should be done to support the establishment of ESCOs that are active in the field of energy efficiency? -single choice reply-(optional)	Yes
a) Public databases of companies offering energy efficiency services -single choice reply-(optional)	Neutral
b) Central information points and intermediaries to facilitate contracting arrangements -single choice reply-(optional)	Neutral
c) An independent facility (such as an ombudsman) to settle disputes and complaints between consumers and ESCOs -single choice reply-(optional)	Neutral
a) Industrial consumers -single choice reply-(optional)	Yes
b) SMEs and commercial consumers -single choice reply-(optional)	No

c) Residential consumers -single choice reply-(optional)	No
29. In your country, do the following consumer groups have access to dynamic pricing and/or time-differentiated tariffs (e.g. time-of-use tariffs)? -multiple choices reply-(optional)	Suppliers
30. Regarding the participation of end-consumers in demand response, who should offer demand response services to residential consumers and SMEs? -multiple choices reply-(optional)	Suppliers - Aggregators
31. Who should offer dynamic pricing to residential consumers and SMEs? -multiple choices reply-(optional)	Suppliers - Aggregators
32. If there is little or no dynamic pricing in your country, what are the barriers? -multiple choices reply-(optional)	Technical standards - Regulatory barriers
a) The load (demand capacity) that can be adapted by the consumer upon request should be measured at aggregated level -single choice reply-(optional)	Agree
b) Consumers should be able to enter aggregation programmes regardless of the size of their load -single choice reply-(optional)	Agree
c) On-site qualification tests for demand-side units should be carried out at an aggregated level -single choice reply-(optional)	Neutral
d) Consumers should be able to participate in the primary balancing market -single choice reply-(optional)	Agree
e) Network operators should be obliged to offer products, services and contracts which match the characteristics of flexibility that residential and small industrial/commercial consumers can typically provide (i.e. smaller loads for limited time) -single choice reply-(optional)	Neutral
f) The full activation time within which primary reserve capacities must be provided should be sufficiently long for thedemand side to prepare and react -single choice reply-(optional)	Agree
g) The minimum duration of the requested adaptation of the demand should be kept within limits that are acceptable for consumers (for example maximum 15 minutes) -single choice reply-(optional)	Neutral

33.1. The time within which primary reserve capacities must be fully activated should be: -single choice reply-(optional)	No opinion
33.2. The minimum duration for which the adaptation of demand is offered at the balancing market should be -single choice reply-(optional)	No opinion
33.3. Further comments -open reply-(optional)	
a) Aggregators have full access to the market -single choice reply-(optional)	Disagree
b) Aggregators appear today as active players in the energy market -single choice reply-(optional)	Disagree
c) Suppliers should be allowed to act as aggregators -single choice reply-(optional)	Agree
d) Member States should incentivise aggregators -single choice reply-(optional)	Agree
a) A large number of consumers would engage in demand response programmes if they were offered simple services and hassle-free technical solutions -single choice reply-(optional)	Agree
b) Only very specific consumer segments (like young people and people without children) would engage in demand response programmes -single choice reply-(optional)	Neutral
c) Overall few consumers would engage in demand response programmes -single choice reply-(optional)	Disagree
a) Have a smart meter installed on his own request and at his expense even if smart meters are not rolled out systematically in his area? -single choice reply-(optional)	Yes
b) Have a smart meter with functionalities of his own choice even if a different type is rolled out in his area? -single choice reply-(optional)	Yes
a) Smart appliances and/or smart energy management systems are a precondition to make the field of demand response accessible to a broad range of consumers -single choice reply-(optional)	Agree
b) Smart appliances and/or smart energy management systems are a facilitator to make the field of demand respons accessible to a broad range of consumers -single choice reply-(optional)	Agree

c) Smart appliances should also display information on consumption and consumption patterns -single choice reply-(optional)	Agree
e) Smart appliances and/or energy management systems, if correctly set up, will not mean a reduction of user comfort -single choice reply-(optional)	Agree
38. The Energy Performance of Buildings Directive lays down that all new buildings will have to be nearly-zero energy buildings by 2020. This means that buildings will have to be very energy-efficient while covering the low remaining energy need for heating and cooling with renewable energy produced on site or nearby. In line with the Renewable Energy Directive, consumers can decide to generate renewable energy without having to face disproportionate permitting and grid connection procedures. When combining energy management systems and smart appliances with self-production, consumers can achieve greater energy autonomy. Do you think that it is sufficiently easy for a consumer to install and connect renewable energy generation or micro-CHP equipment in their house? -single choice reply-(optional)	No
If not, what is the most important obstacle? -single choice reply-(optional)	Getting connected to the distribution grid
a) Their self-produced electricity to the grid? -single choice reply-(optional)	Yes
b) Electricity to different suppliers? -single choice reply-(optional)	No
c) Electricity to their neighbours? -single choice reply-(optional)	No
40. If not, please specify why this is not possible? -open reply-(optional)	
a) Self-generation and auto-consumption reduces the need for generation and network capacity for society as a whole and should therefore be exempt from additional charges -single choice reply-(optional)	Disagree
b) Self-generators/auto-consumers should contribute to the network costs even if they use the network in a limited way -single choice reply-(optional)	Agree

c) The further deployment of self-generation with auto-consumption requires a common approach as far as the contribution to network costs is concerned -single choice reply-(optional)	Neutral
d) The further deployment of self-generation with auto-consumption requires a common approach for the simplification of related administrative procedures -single choice reply-(optional)	Neutral
e) Member States should give more financial incentives for promoting self-generation and auto-consumption of heat from renewable energy sources and micro-CHP -single choice reply-(optional)	Disagree
a) There should be incentives for electrical heating appliances that are demand response-ready -single choice reply-(optional)	Disagree
b) There should only be incentives for electrical heating that is demand response-ready if the underlying technology is very energy efficient (e.g. heat pumps) -single choice reply-(optional)	Neutral
c) Member States should give more financial incentives for the purchase of highly efficient heating technologies, irrespective of the fuel -single choice reply-(optional)	Disagree