INOGATE Status Reports

Presentation of the Preliminary Findings

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Background

- **Annual Status Reports; IEA review for 2013-2014**
  - 11 Caspian and Black Sea country reviews; funded by the EU
  - Uzbekistan review took place in December 2013
  - Draft report under government's consideration

- **Review team**
  - IEA experts, INOGATE Technical Secretariat, peer-reviewers from the participating countries, the local INOGATE experts

- **Major objectives**
  - 4 pillars: energy security, sustainable development, investment attraction, market convergence
  - General energy policy and energy balances

- **Compendium publication in Q4 2014**
  - Uzbekistan review scheduled for 28-30 May 2014
  - Draft publication to be completed by July 2014
Regional energy mix – Total Primary Energy Supply

- Resource reach regions
- Manageable import dependency/feasible self sufficiency
- Need for smart solutions and justified investments
- Increase export potential to energy hungry markets
Energy intensity

- Positive trends, yet lack of long-term sustainability
- More robust policy actions required
- Impact on all sectors of economy

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Electricity generation

- Dominant share of coal in Kazakhstan and Ukraine
- The role of natural gas across the region
- Vast hydro potential in Georgia, Kyrgyzstan and Tajikistan
- Nuclear power and the role of renewables energy
Uzbekistan 2012 review findings

- Self sufficient in energy resources
- Sturdy demand growth; 8% GDP growth to 2020
- High energy intensity
- Aging energy infrastructure
- Energy subsidies; lack of EE policies & measures
- Recent developments in alternative energy field

TPES 1990-2011

TFC 1995-2011
Energy security

- Aging infrastructure causing losses and outages
- Inefficient electricity generation
- Diversification of energy export options and growing demand

Market convergence

- Financial and legal unbundling of electricity TSO and DSOs and partial privatisation under way
- Need to develop an effective market model which will enable market driven investments
Sustainable development

- Focus on sustainability of energy systems, particularly aged and inefficient energy infrastructure
- Encourage deployment of renewables
- Need for EE and RE funding and incentive mechanisms

Investment attraction

- Investment climate improved
- Maintain clear, predictable and transparent investment framework
- Promote energy efficient technologies
Preliminary findings and recommendations

- Developing overall energy strategy
- Improving statistics data exchange
- Upgrading or replace aging energy infrastructure
  - district heating and gas distribution networks
- Reducing energy intensity in all sectors of economy
- Considering staged phasing out of energy subsidies
- Promoting EE and RE development at larger scale
  - Continuing with energy efficiency in transport sector
  - Elaborating on a building code (new and retrofit)
- Continuing maximising vast solar potential
- In upstream oil and gas developments
  - Encourage latest technologies for enhanced oil & gas recovery
  - Continue exploring for alternative (shale) oil and gas reserves
- Promoting research and development activities
Thank you