Eastern Europe, Caucasus and Central Asia

Energy Policies Beyond IEA countries
Countries with a shared history
Regional trends

Significant Energy Resources

Varied Trends in Market Designs

Lack of Well-elaborated Policies and Regulations

Implementation Challenges
Considerable potential

Energy efficiency

- Vague policy
- Energy pricing

Renewable Energy

- Secondary legislation elaborating on rules for grid integration

Potential for an energy transition
Challenges and opportunities

- Strategies based on data
- Emergency preparedness
- Strong demand
- Aging infrastructure
- Energy efficiency potential
- Renewable energy potential
- Energy markets
Planning for the future

NEED FOR POLICY BASED ON ENERGY STATISTICS

AMBITIOUS TARGETS ALIGNED WITH GOALS
Kazakhstan
Moldova

REQUIRE NEW STRATEGIES
Azerbaijan
Georgia
Tajikistan

PLANNED DEVELOPMENTS AIMED AT RELIABILITY
Belarus
Turkmenistan
Uzbekistan

REQUIRE ELABORATION
Armenia
Kyrgyzstan

REQUIRE REVISION
Ukraine
Energy Planning

Medium- to long-term energy policy developments

Harmonised sector strategies and regularity framework

Statistics strategies

Energy data management and use

Improved data, coherent with international standards

Means for developing comprehensive demand side & RE data

Incorporating energy technology related R&D data

Focus on sustainability
Armenia

Policy highlights
• Heavy oil and gas import dependence (75% of TPES)
• Untapped Energy Efficiency gains potential
• High RES potential, focus on small hydros

Data Management and Use
• National Statistical Service - ITS MOU July 2013
  • Improving methodology for energy data collection and use
• Law on State Statistics from 2000
• Three year plan, current 2013-2015
• International data reporting undertakings
• Regular national data dissemination and publications
• Luck of evidence based energy policies
Policy highlights
• Net exporter of oil and gas
• Government focus on sustainable development
• Considerable scale of RES technology deployment
• Insufficient demand side management

Data Management and Use
• The State Statistical Committee
• The State Program on data enhancement 2013-2017
• Energy balance in international format since 2011
• International data reporting undertakings
• Joint Organisation Data Initiative (JODI)
• Insufficient use of data in setting policy directions
• Declared targets, yet need for comprehensive policy
Belarus

Policy highlights
• has a fully state-owned energy sector
• Launched plans for energy sector restructuring
• Aim for gradually phase out of energy subsidies
• Enhanced predictability of investment climate
• Push for RE and EE technology deployment

Data Management and Use
• National Statistical Committee and MoE cooperation
• Data use for energy strategies and industry planning
• International data reporting
• Need for accurate demand side and off grid RE data
• Potential for developing energy efficiency indicators
Georgia

Policy highlights
• Stable transit country and regional interconnections
• Potential for gradual opening of the electricity market
• Focus on large hydropower development
• Luck of energy efficiency policy and governance
• Declared energy policy directions; strategy in making

Data Management and Use
• National Statistics Office and MoE
• 2013 Energy Balance under international standards
• Enhanced data; further need for reliable EE & RES data
• Encourage energy RD&D data collection and use
• International data reporting obligations
• Need for evidence based policy design
Kazakhstan

Policy highlights
• is the world’s leading oil producer
• has clear economic and energy policy directions and ambitious goals for a low-carbon economy
• Progress in designing functional energy markets

Data Management and Use
• The Committee on Statistics and Ministry of Energy
• 2010 law on State Statistics and Strategic Plans
• international data reporting undertakings
• Energy data use discrepancies
• Need for accurate demand side data
• Potential for developing EE indicators
• Need for enhance energy data management and use
Policy highlights

• Vast hydro resources and sizable coal deposits
• High EE gains potential, lack of demand side policies
• Need for public awareness on energy savings, energy efficiency gains and the real cost of electricity
• Urgent need for cost recovery tariffs for enabling investment in aging infrastructure

Data Management and Use

• The National Statistic Committee (energy department)
• National data laws, methodologies
• Household energy survey developments in 2014 (ITS)
• International reporting obligations
• Need for evidence based policy planning
Moldova

Policy highlights
• Heavy dependence on fossil fuels & electricity imports
• Focus on energy security and sustainability
• High energy efficiency gains potential in DH sector
• High renewable energy potential

Data Management and Use
• National Bureau of Statistics and Ministry of Economy
• NBS and ME MoU with ITS in April 2013
• International reporting obligations
• Need for accurate demand side data
• Enhance reliability of RES (off grid) data collection
• Enhance evidence based policy design
Tajikistan

Policy highlights
• Endowed with abundant hydro potential
• Focus on increase of hydro generation for export
• Need for removing subsidies and gradually moving to cost recovery tariffs
• High energy efficiency gains and RE potential

Data Management and Use
• Statistics Agency and Ministry of Energy and Water
• Law on State Statistics (2010) and NES Action Plan
• International reporting obligations
• Requires demand side and RE (off grid) data
• Need for evidence based policy planning
Turkmenistan

Policy highlights
• largest gas resources holder in the Caspian region and holds significant volumes of recoverable oil
• Focus on export marker diversification and downstream petroleum sector developments

Data Management and Use
• The State Statistical Committee
• Law on State Statistics in 2012
• No international data reporting
• Data used internationally not verified by government
• No clarity on level of data use in policy settings
Ukraine

Policy highlights
• Launched widespread energy market reform (2015)
• Aims at enhance domestic gas production
• Needs maximising EE gains potential
• Supports renewable energy technology deployment
• develop emergency response mechanisms
• rethink short, medium, and long-term energy strategies to account for new realities

Data Management and Use
• The State Statistical Service of Ukraine develop
• Energy Balances in international format since 2010
• required for streamlining demand-side data
• No evidence based policy planning
Uzbekistan

Policy highlights
• is rich in natural gas resources and has an economy that has grown without recession since the 1990’s
• take aggressive action on removing energy subsidies
• encourage the deployment of advanced energy efficiency and renewable energy technologies
• encourage smart investments in the country’s conventional and alternative energy developments

Data Management and Use
• State Statistics Committee and Government relations
• Limited data in public domain
• Energy Statistics Action Plan (ESAP) for 2012-14
• No clarity on level of data use in policy settings
Thank you for your attention