



PROGRAMME FUNDED BY THE EU



“Security of supply: Current outlook and future development in the Republic of Armenia”

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BUILDING PARTNERSHIPS FOR ENERGY SECURITY

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Agenda



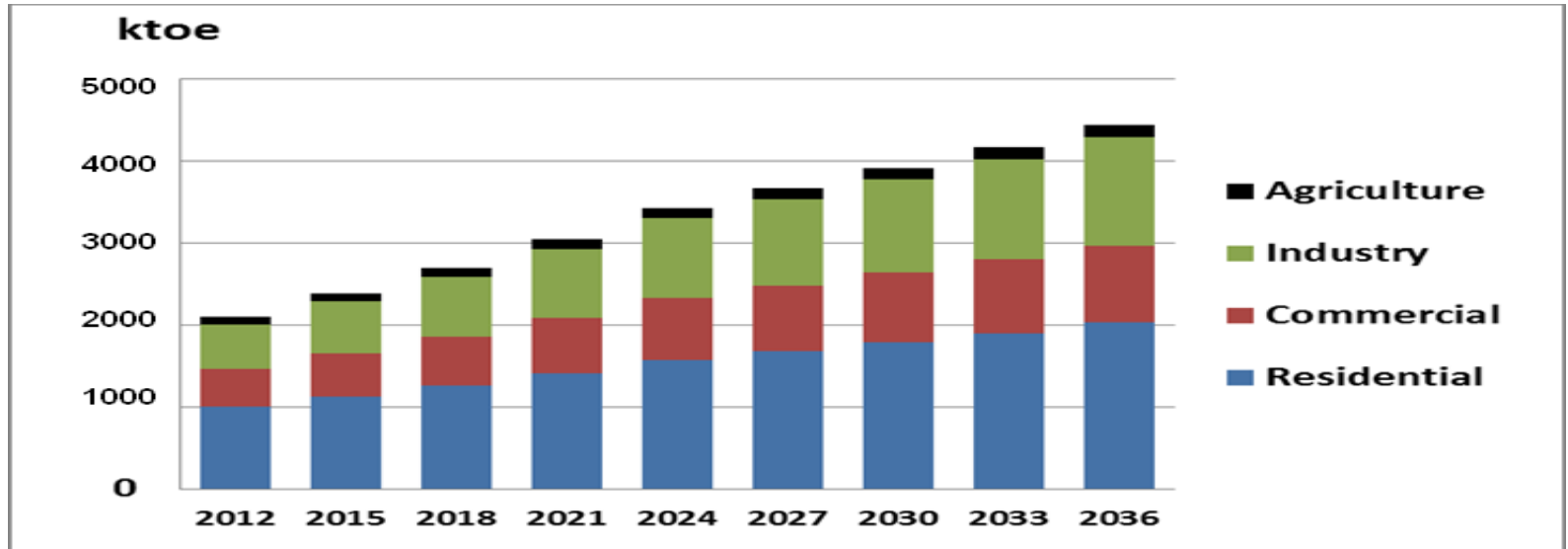
1. Evolution of Supply/Demand Balance
2. Energy Policy, Legal or institutional framework for Security of Supply
3. Main challenges in implementing the policy and or legal/regulatory framework
4. Identification of strategic investments/projects at national level
5. Regional coordination for Security of Supply (plans and/or projects)
6. International cooperation

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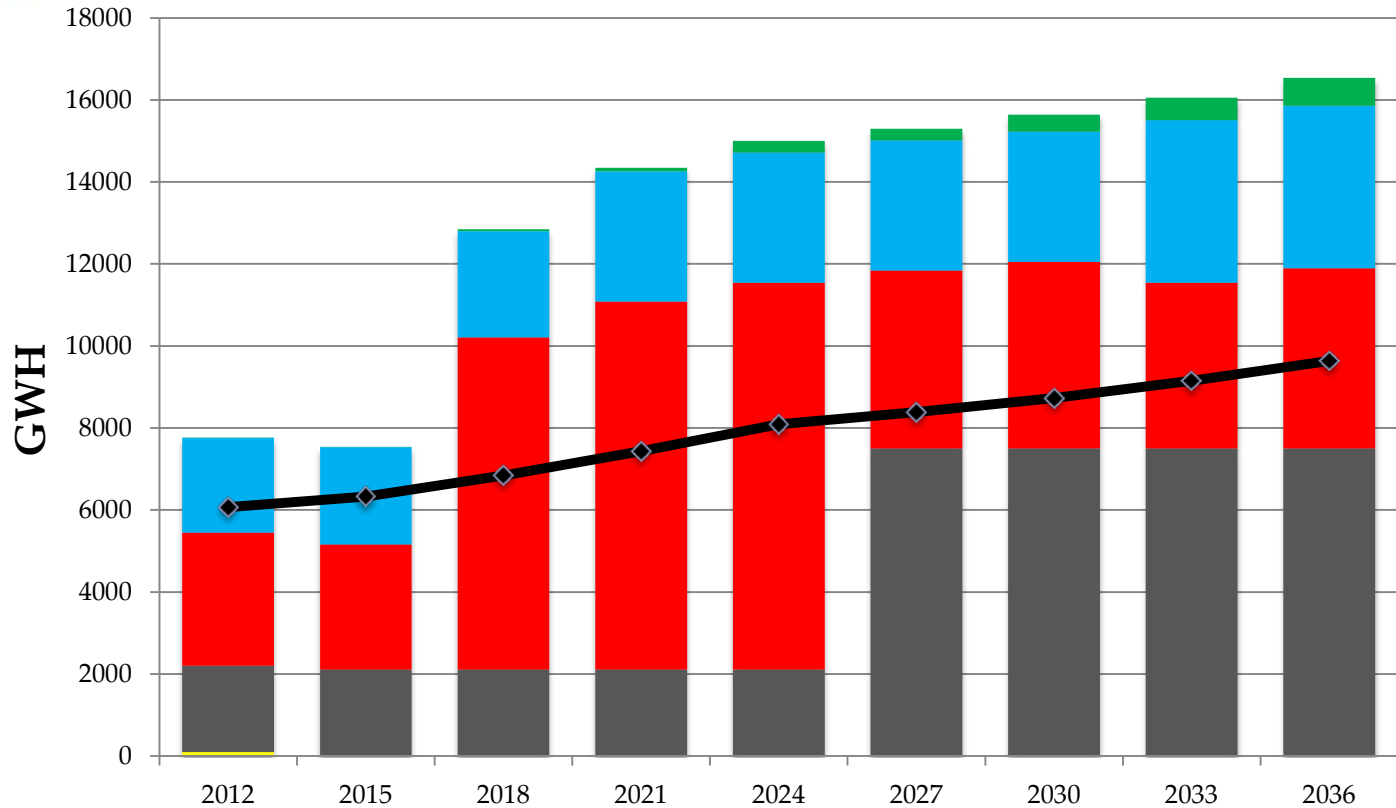
1. Evolution of Supply/Demand Balance

Annual growth of Energy demand



- Residential 3.0%
- Services 2.9%
- Industry 3.8%
- Agriculture 2.3%
- Vehicles
 - Motor 2.0%
 - Trucks 4.0%

1. Evolution of Supply/Demand Balance Electricity production by type



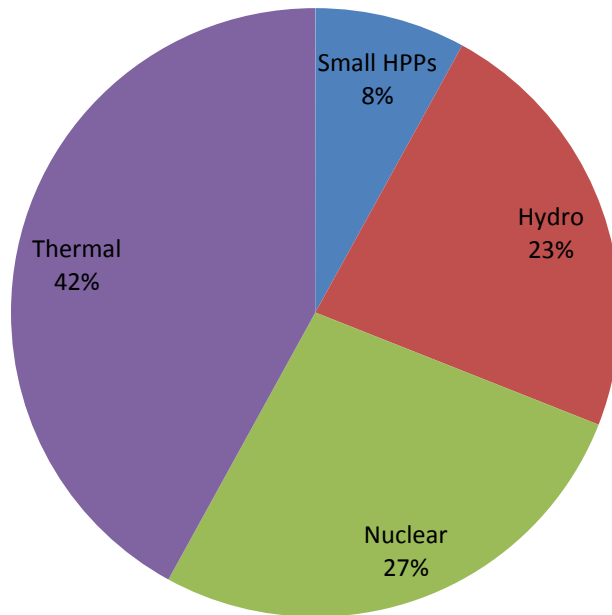
Import,
 Nuclear,
 Thermal,
 Hydro,
 Renewable



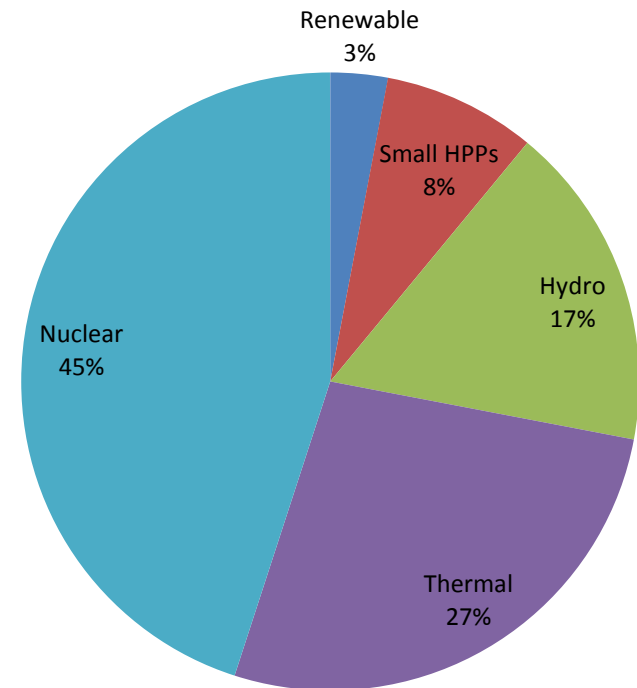
1. Evolution of Supply/Demand Balance Production structure



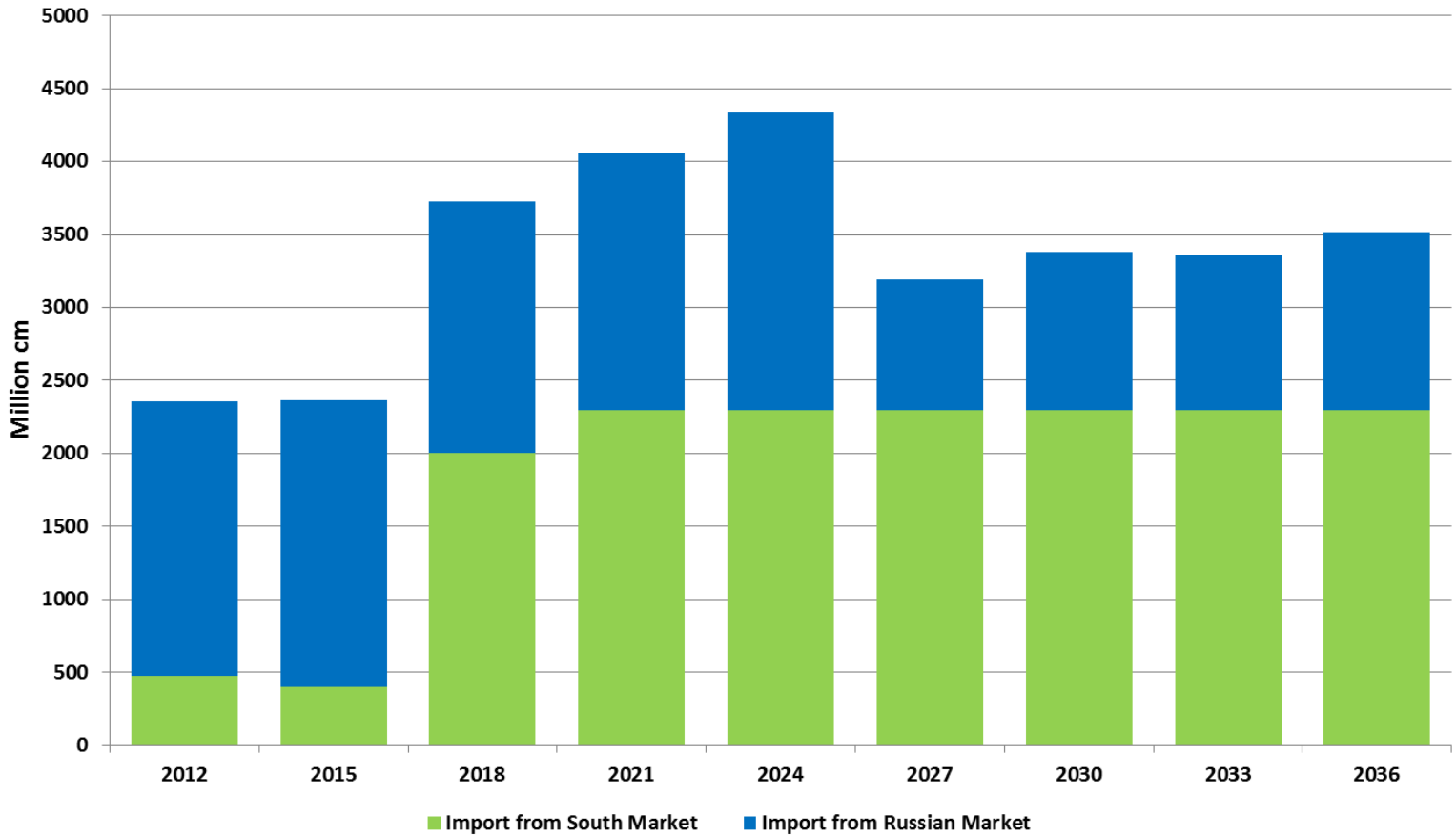
2012



2036



1. Evolution of Supply/Demand Balance gas import



2. Energy Policy, Legal or institutional framework for Security of Supply



- In an effort to ensure an appropriate level of energy security of the RoA we have developed a Concept of the Energy Security of the Republic of Armenia that was approved by the RoA President's decree in October 2013.
- The RoA government was adopted a program-schedule of the events to be held in 2014-2020 providing for the implementation of the concept provisions.
- “RA Energy Sector Long-term (up to 2036) Development Concept” was developed, which is aimed to highlight midterm and long-term implementing measures towards the preservation and continuous enhancement of energy security and reliability.



2. Energy Policy, Legal or institutional framework for Security of Supply: Energy Strategy Pillars

- Development of Nuclear Energy
- Development of Renewable Energy, Energy Efficiency and Energy Saving Programs
- Regional integration
- Diversification by Primary Energy Sources and Supply Routes

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3. Main challenges in implementing the policy and or legal/regulatory framework



- Creation of new capacities, infrastructure renewal projects are implemented by credit measures, which impact on the final consumer tariffs
- We have no other barriers for involving investment, loans, credits of energy sector from international financing institutions except of sovereign guarantee
- The Government of Armenia encourages the private sector participation in the development of energy infrastructure. Realization of projects particularly in the renewable energy sector is foreseen only through private investment.

4. Identification of strategic investments/projects at national level



- Construction 400 kV TL Armenia -Georgia
- Construction 400 kV TL Armenia-Iran
- Construction CCPP 220 MW Yerevan
- Construction Meghri HPP 130 MW
- Construction Shnogh HPP 65 MW
- Construction Lori Berd HPP 65 MW
- Solar PV up to 40 MW
- Wind farm 150 MW
- New NPP 600 MW

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5. Regional coordination for Security of Supply (plans and/or projects)



- Implementation of initiative electricity corridor South-West (Iran-Armenia-Georgia-RF) (Transit of electricity, seasonal exchange)
- Gas-electricity exchange program Iran-Armenia increasing the volume after 2018

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6. International cooperation



- The donor community played an important role in promoting development of energy sector in Armenia through a number of projects, including resource assessments and mapping, which also provided both investment and technical assistance to improve the legal and regulatory framework KFW, ADB, WB, EBRD, EIB, USAID, SREP, E5P, EU NIF

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Thank you!

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INOGATE Technical Secretariat and Integrated Programme in support of the Baku Initiative and the Eastern Partnership energy objectives

