

Introduction on benchmarks and key indicators of energy efficiency in the Partner Countries

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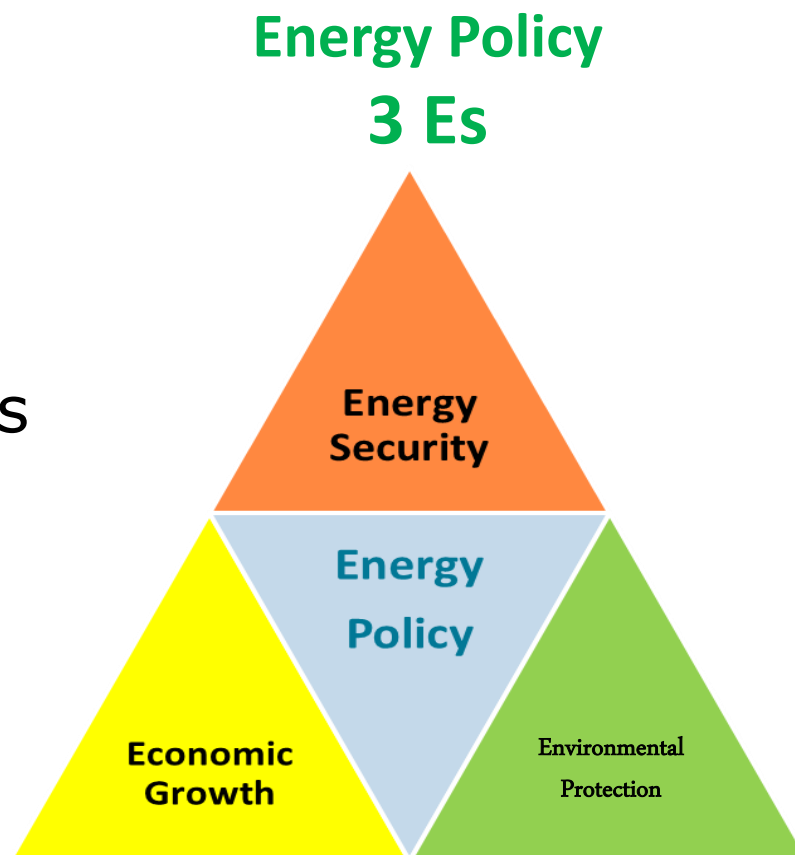
Office of Global Energy Policy

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- Astana Road Map
 - 2011 Status Report by ITS
 - 2012 and 2013 review cycles; IEA led peer reviews
- Peer Review teams
 - IEA experts, INOGATE Technical Secretariat, peer-reviewers from the Partner Countries, the local INOGATE experts
- Review objectives
 - 4 pillars: energy security, sustainable development, investment attraction, market convergence
 - General energy policy and energy balances
- Upcoming Publications
 - Short Summary Report in August 2014
 - Compendium publication in QI 2015

- **Energy security**
 - Energy infrastructure - maintenance, upgrade and rehabilitation; New infrastructure; System reliability
- **Energy market convergence**
 - Third-party access; Unbundling; Independence of energy regulators; Technical rules; Integrated regional markets
- **Sustainable development**
 - Policy commitments; Energy Efficiency & Renewable Energy framework development; EE/RES action plans and measures; EE/RES sector governance; Environmental standards; Climate Policies
- **Investment attraction**
 - Investment framework; Investment climate; Investment planning; major energy investments

- Policy frameworks
- Regional similarities
- Common challenges
- National contexts
- Areas of energy policy focus
 - Political consensus
 - Clear long-term vision
 - Stable institutions
 - Leadership
 - Stakeholder engagement
- Regional integration



■ Common challenges

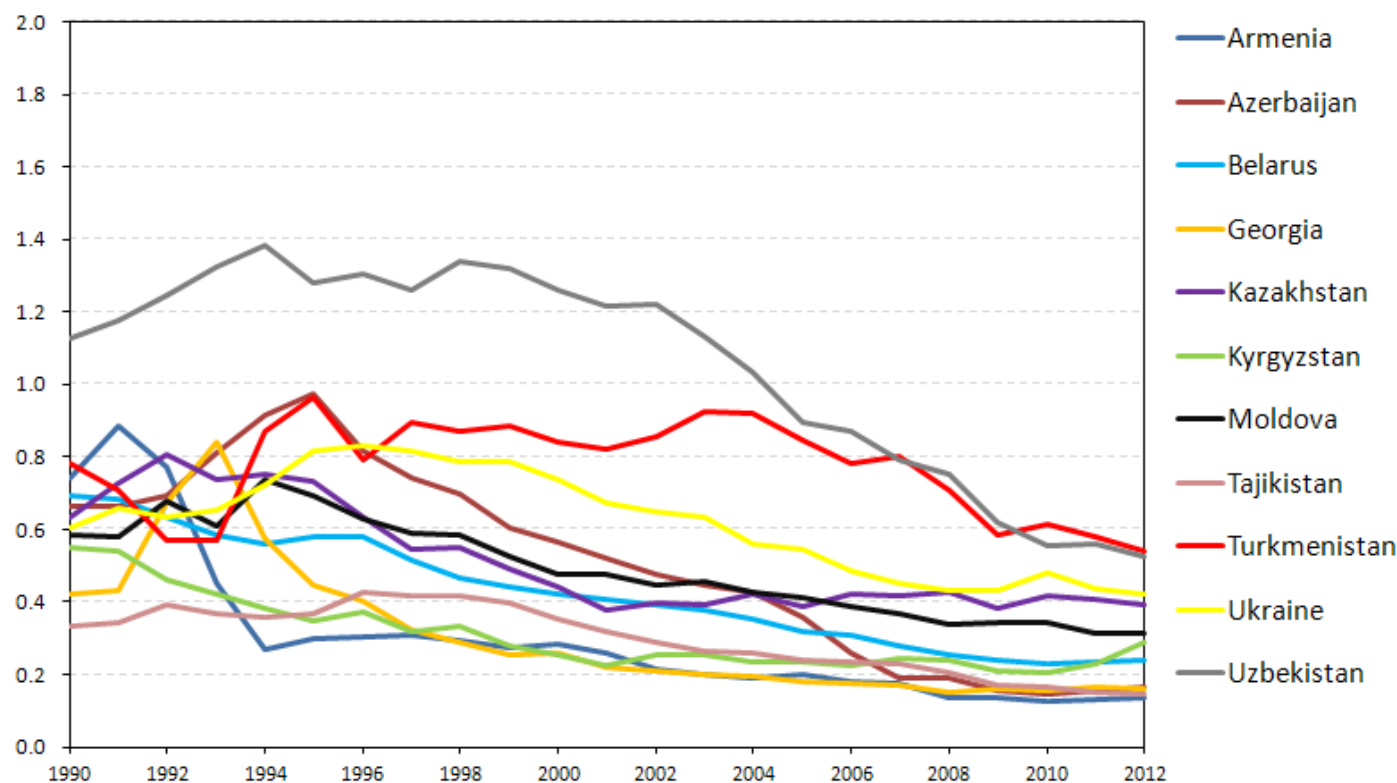
- Robust energy demand
- Focus on short term economic priorities
- Weak regulatory frameworks
- Aged energy infrastructure; need for smart investments
- Supply side focused policies and measures; lack of demand side management; need for improved end use data and EE indicators; and poorly integrated transport policy

■ Key opportunities

- Medium and long term energy policy scenarios with different fuel mix options; use of energy data for policy planning
- Maximising energy efficiency gains
- Utilisation of renewable energy potential
- Phasing out import dependency or maximizing export potential

Energy Intensity

- Positive trends, yet lack of long-term sustainability
- Need for robust policy actions
- Measures to impact all sectors of economy



■ Armenia

- National Programme on Energy Savings and Renewable Energy
 - 40% energy saving potential in residential and building sector
 - Heating sector potential estimated at up to 30% energy use
 - Industrial energy savings potential ranges from 14-23%
- Need for developing legislation and improving EE governance

■ Azerbaijan

- Declared 20/20/20 goals
 - Energy intensity declined by 65% since 2002
 - 20% increase in energy efficiency by 2020
- Need for developing legislation and improving EE governance

■ Belarus

- National Programme on Energy Savings for 2011-2015
- Socio-economic Development Plan for 2011-2015
 - Energy intensity decrease by 44.4% from 2000 levels in 2011
 - Energy intensity reduction target is set at 50% (from 2005 levels) and 29-32% for the period 2011-2015

■ Georgia

- Energy strategy in making
 - Current power sector policy dates back to 2006
- Active non-government sector; Large scope of EE projects
- Need for developing legislation and improving EE governance

■ Moldova

- National Energy Efficiency Action Plan 2013-2015
 - Annual reduction of final energy consumption by 1,8% (from 2009 levels)
 - Developed regulatory framework; adopted standards
 - Large body of secondary legislation

■ Ukraine

- Energy Strategy of Ukraine to 2030
 - Decrease energy intensity by 54% by 2030 (from 2009)
- Draft National Energy Efficiency Action Plan (trough 2020)
 - Assessed energy savings potential in all sectors of economy

- 'Hidden Fuel'
 - Untapped potential for energy Efficiency gains
- Need for enhanced demand side management
 - Establish robust energy efficiency policies and measures
 - Introduce/implement primary and secondary legislation
 - Improve energy efficiency governance
 - Promote funding and incentive mechanisms
 - Ensure timely implementation of set policies and measures
- Data management
 - Collect reliable end use data
 - Develop energy efficiency indicators to monitor progress

Thank you

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IEA Energy Policy Analysis

In-depth Energy Policy Reviews

- IEA Members
- Energy Policies Beyond IEA Countries

