

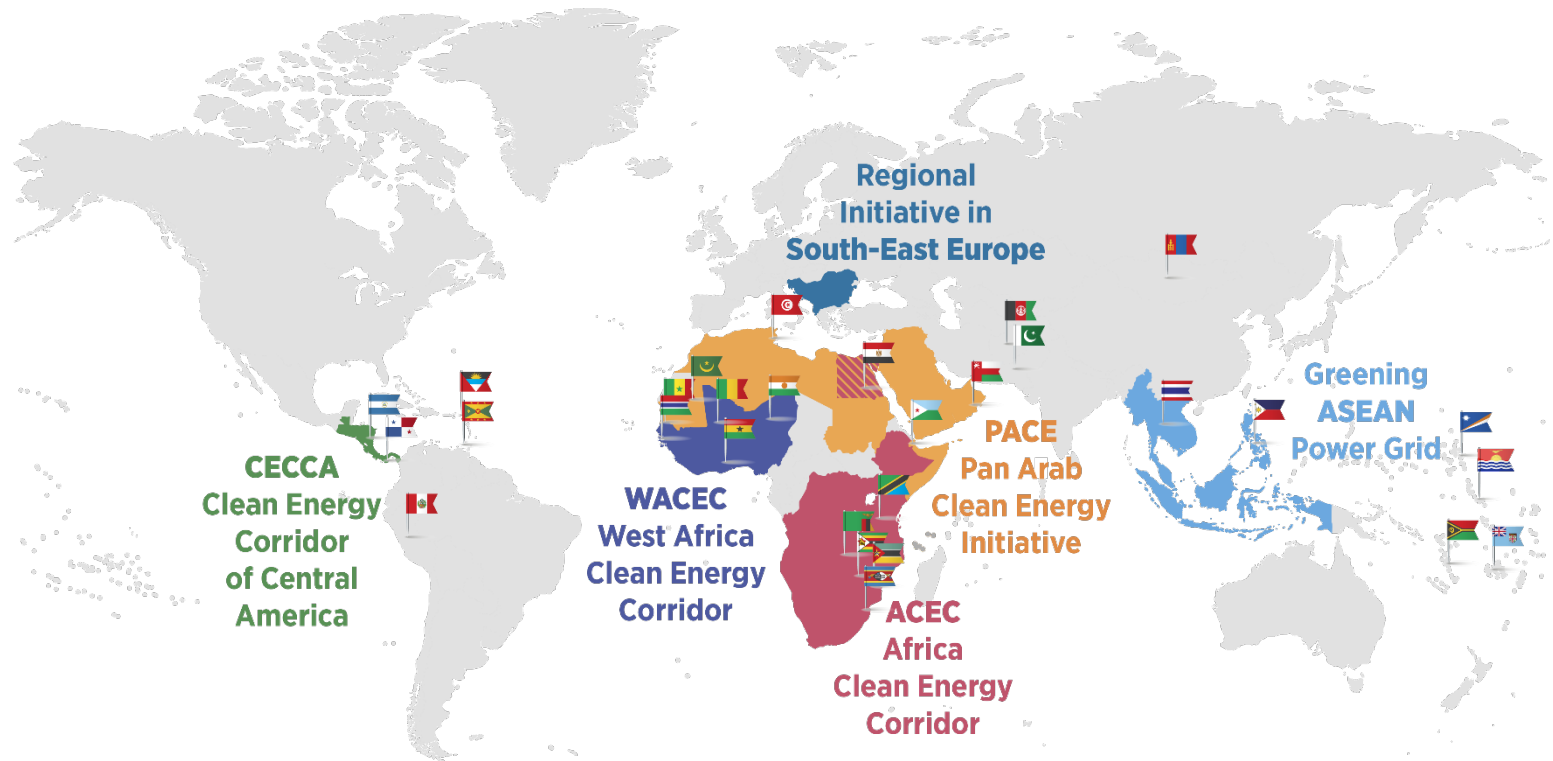
# The Outcomes of the High-Level Meeting on Renewable Energy in South East Europe

**Marcin Ścigan – Associate Programme Officer**

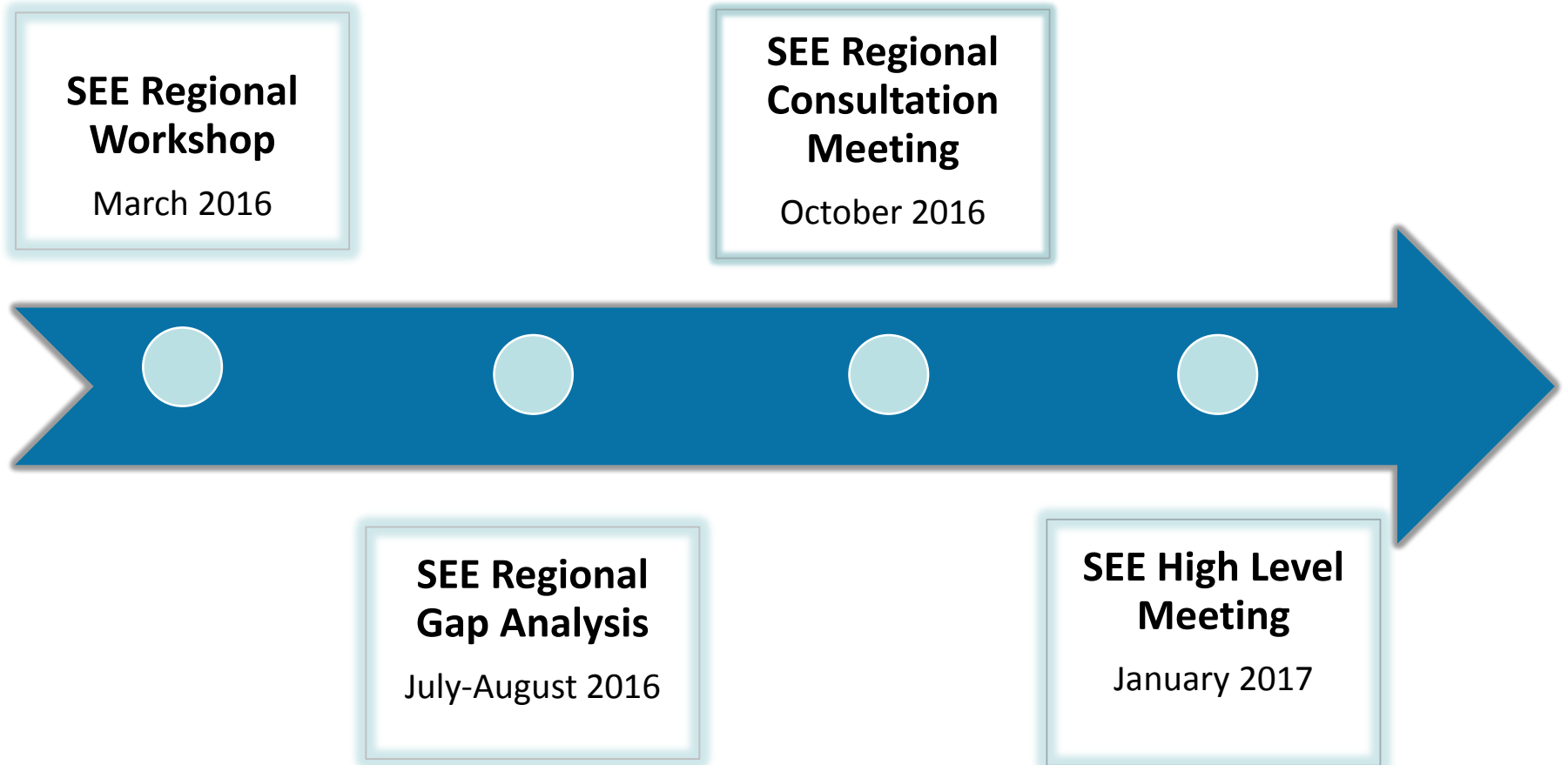
Renewable Energy Coordination Group

7 March 2017, Vienna, Austria

# IRENA's regional initiatives



# Regional Consultation Process



# SEE High-Level Meeting

## Abu Dhabi, 13 January 2017

- Discussion on the **opportunities and challenges** in expanding the share of renewable energy in the region's energy mix.
- Guidance on the potential areas where **IRENA could offer most added value** to its Members.
- Launch of the publication **Cost-Competitive Renewable Power Generation: Potential across South East Europe**

**Mr. Adnan Z. Amin**, Director-General, International Renewable Energy Agency

**H.E. Mirko Šarović**, Minister of Foreign Trade and Economic Relations, Bosnia and Herzegovina

**Mr. Dominique Ristori**, Director General for Energy, European Commission

Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, Republic of Moldova, Romania, Serbia, Ukraine.

Austria, Germany, Italy, Poland.

European Commission, Energy Charter, European Investment Bank, European Climate Foundation, GIZ, KfW.



# SEE High-Level Meeting

## Abu Dhabi, 13 January 2017

“(…) South East Europe region is **committed to scaling up renewable energy**, as envisaged in the adoption of targets for 2020 and the development of National Renewable Energy Action Plans (…)”

“(…) governments’ intention to **further accelerate renewable energy development, in line with the 2030 Climate and Energy Policy Framework for the European Union** (…)”

“(…) Therefore, mindful of respective policies and priorities, the Heads of Delegation identified the following **opportunities for collaboration with IRENA** (…)”

“(…) underscored the **importance of collaboration with IRENA and other regional and international partners** in a co-ordinated and collaborative manner (…)”

### Abu Dhabi **Communiqué** on Accelerating the Uptake of Renewables in South East Europe



### Draft **Action Plan** to Support Renewable Energy Development in South East Europe



# Abu Dhabi Communiqué on Accelerating the Uptake of Renewables in South East Europe (1)

Mapping the most suitable locations for wind and solar PV development on the Global Atlas online platform and **assessing the renewable energy potential** that can be deployed in a cost-competitive manner across South East Europe;

## Global Atlas FOR RENEWABLE ENERGY

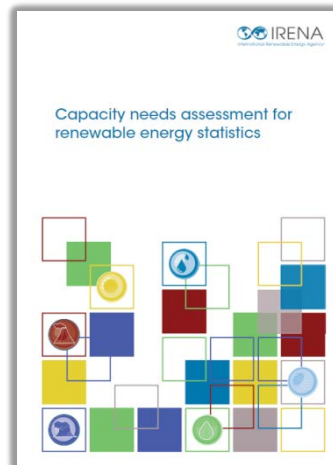
**Wind Atlas Balkan**  
By SANDER + PARTNER Who else?



Implemented by:  
**KFW**



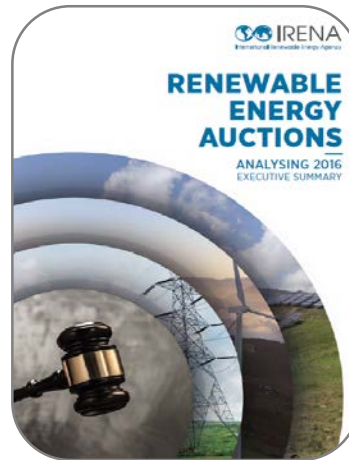
Supporting governments in the intended process of undertaking expected new commitments and developing long-term strategies for renewables, through the comprehensive **analysis of renewable energy markets and the identification of feasible options for scaling up technology deployment** in power generation and end-use sectors;



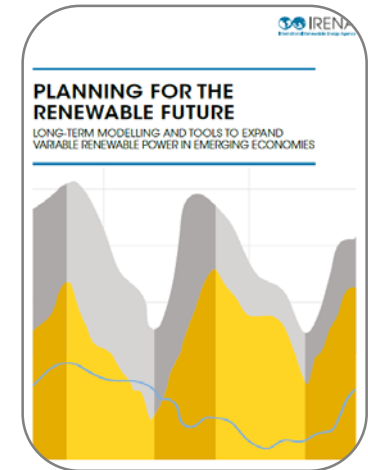
Raising awareness about **socio-economic benefits** and the impact of renewable energy development on end-user prices and affordability, as well as enhancing capacities for the **collection of reliable renewable energy data**, particularly for bioenergy;

# Abu Dhabi Communiqué on Accelerating the Uptake of Renewables in South East Europe (2)

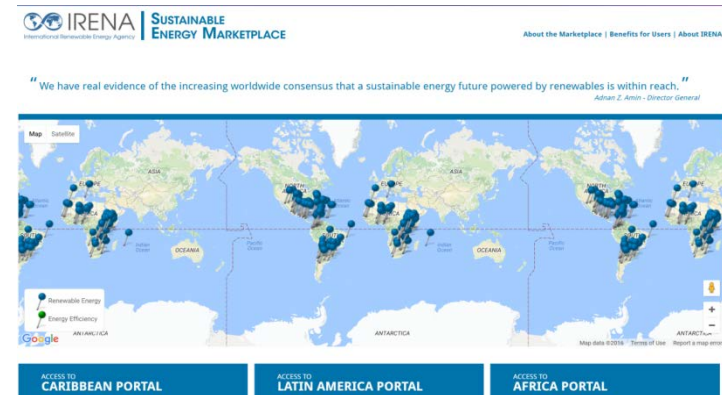
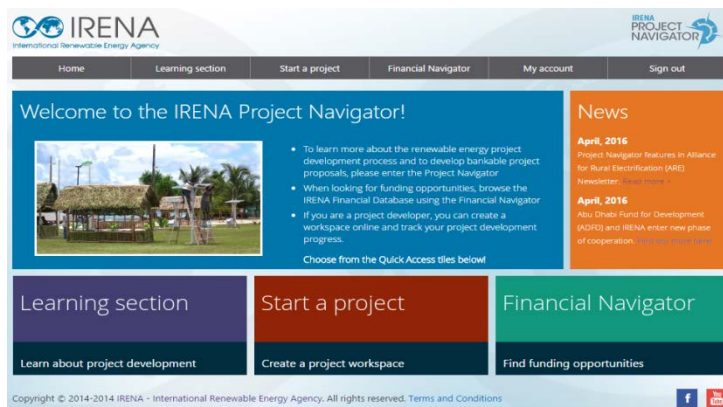
Strengthening the enabling frameworks to promote renewable energy investments, including by supporting the ongoing **transition process towards more market-based support schemes** and the streamlining and simplification of administrative procedures;



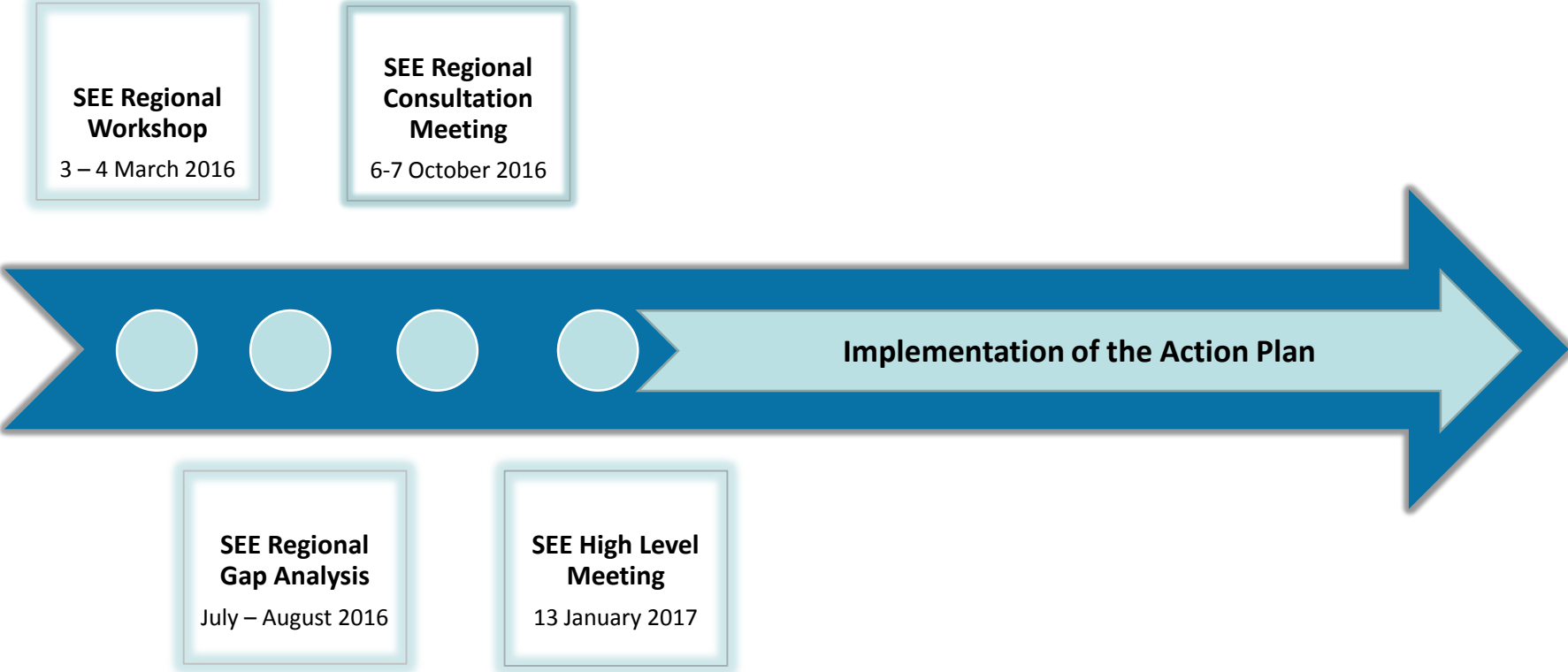
Supporting the development of capacities at the technical, regulatory and operational level for the **integration of variable renewable energy** to power systems;



Promoting the use of the Project Navigator and Sustainable Energy Marketplace platforms to **improve the bankability of renewable energy projects and facilitate access to financial products** in the region, as well as sharing best practices and global experience on renewable energy finance and risk mitigation.



# Draft Action Plan to Support RE Development in SEE

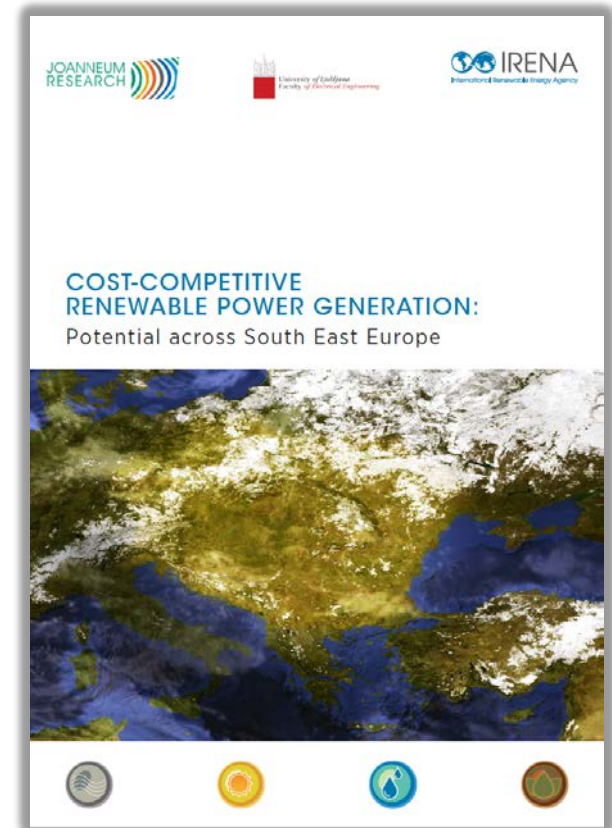






# Cost-Competitive Renewable Power Generation: Potential across South East Europe

## A Snapshot of Findings





# Geographic scope

## Contracting Parties of the Energy Community

- Albania
- Bosnia and Herzegovina
- FYR of Macedonia
- Kosovo\*
- Moldova
- Montenegro
- Serbia
- Ukraine



## Members of the European Union

- Bulgaria
- Croatia
- Romania
- Slovenia

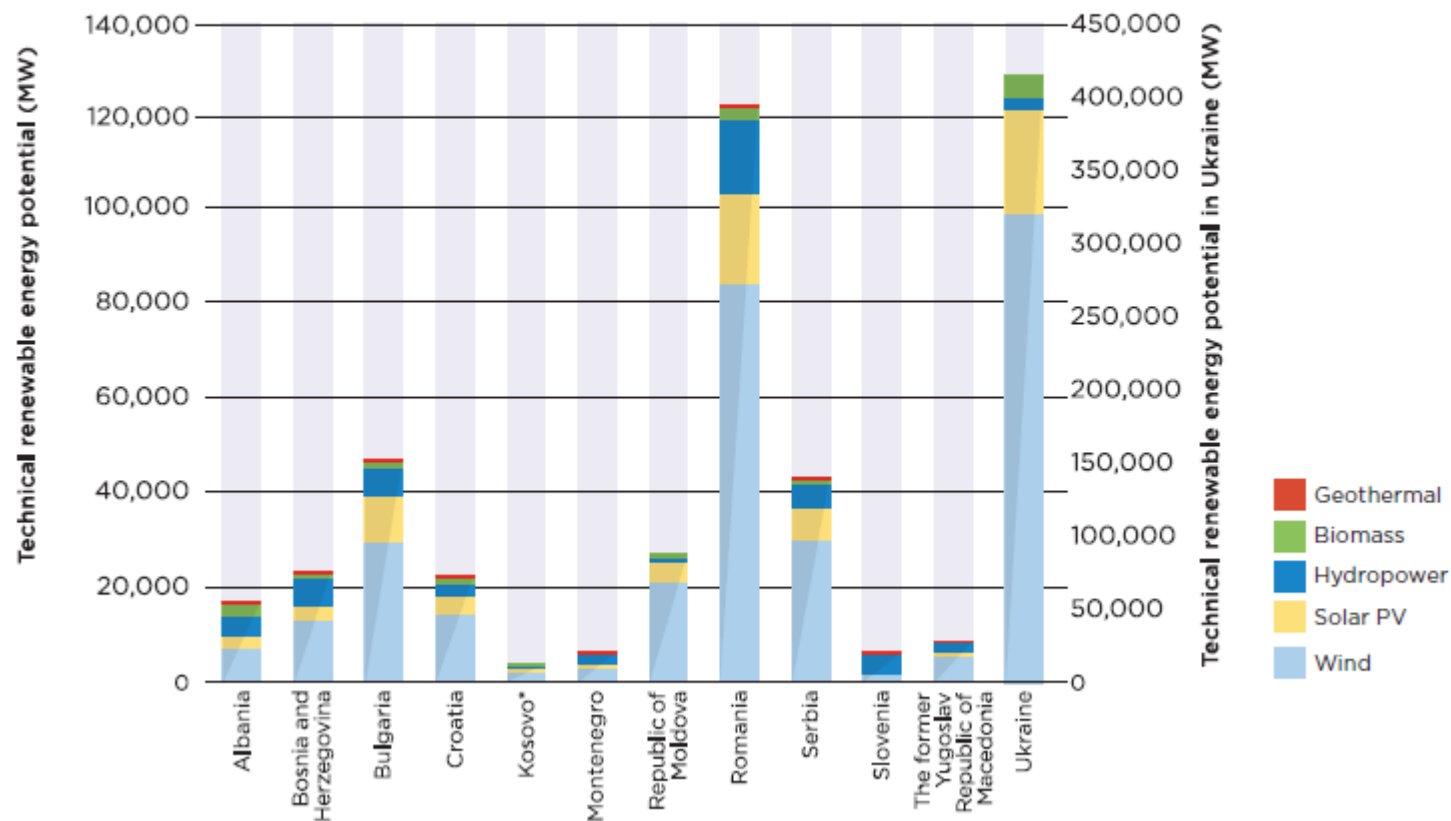


# Technical potential

**740 GW** Technical Renewable Energy Potential

Figure 3.1 Technical renewable energy potential in South East Europe

(Due to its magnitude, the potential for Ukraine is shown in the secondary axis).

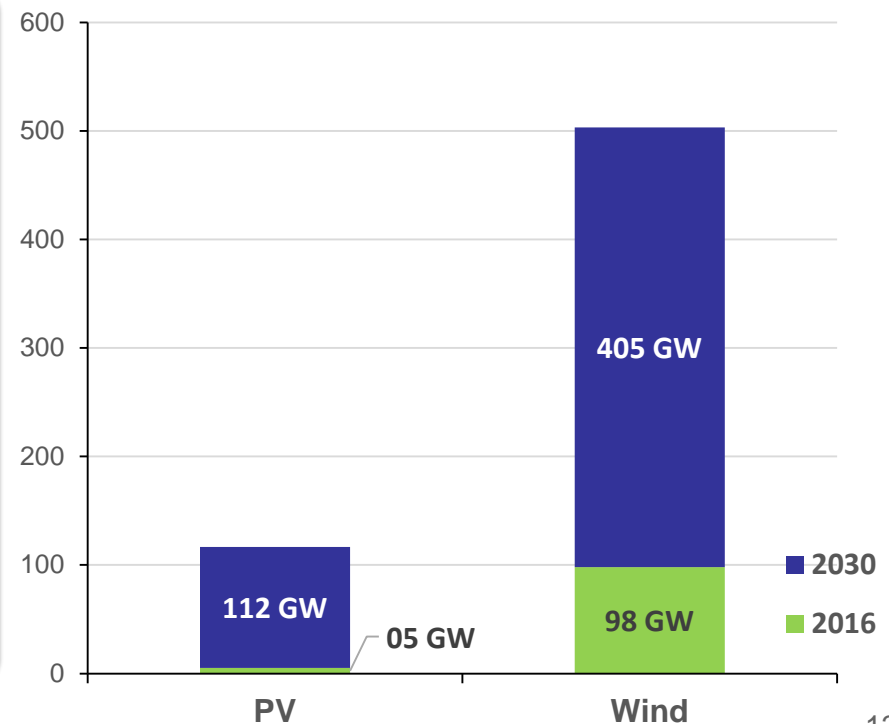
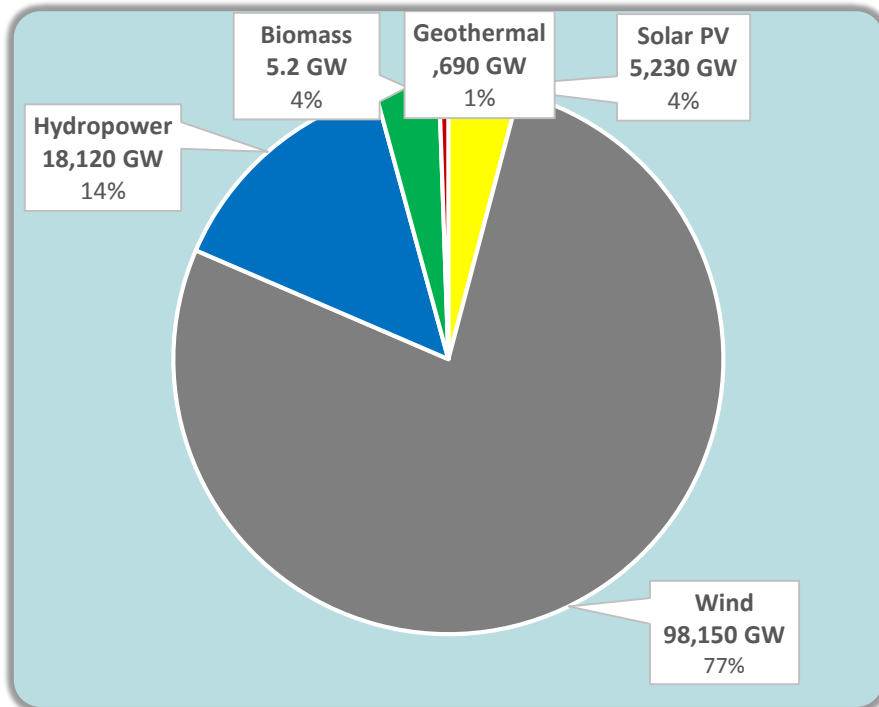


# NREAP targets vs. Cost-competitive additional potential

**8.2 GW** Gap to achieve cumulative RE deployment target for 2020 (based on NREAPs)

**127 GW** of Renewable Energy today

**620 GW** of Wind and Solar PV by 2030

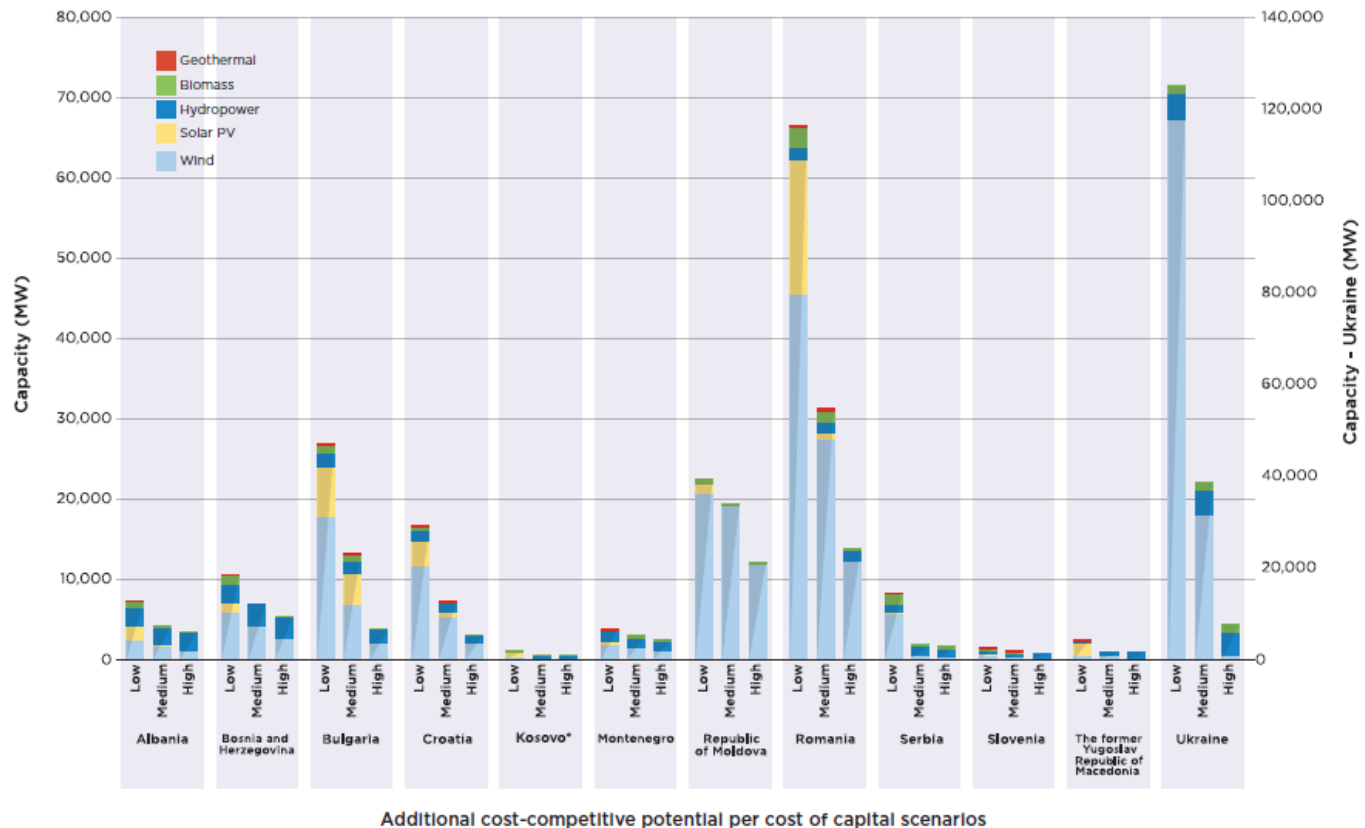


Based on: Medium cost of capital scenario

# Additional cost-competitive RE potential

**74 GW** Additional cost-effective RE potential already available today in the Energy Community

*Figure 3.5 Additional cost-competitive potential in 2016: Overview of SEE*  
 (Due to its magnitude, the potential for Ukraine is shown in the secondary axis).



Based on: Medium cost of capital scenario

# SEE cost-competitive Wind potential

Figure 3.7 Cost-competitive wind potential in SEE in 2016

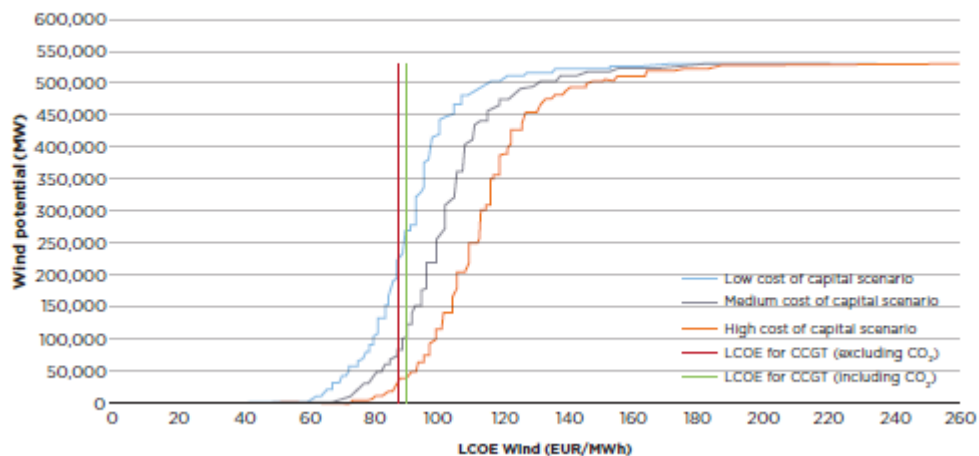
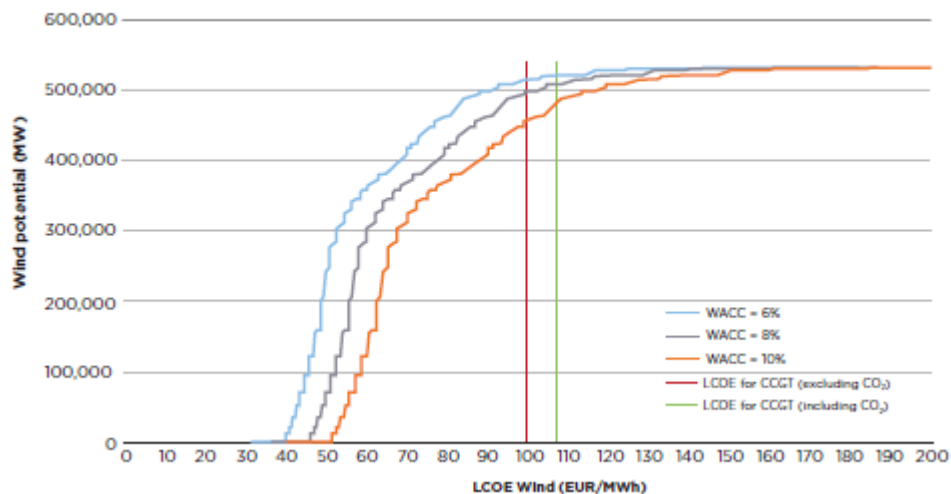


Figure 3.11: Cost-competitive wind potential in SEE in 2030



# SEE cost-competitive solar PV potential

Figure 3.8 Cost-competitive solar PV potential in SEE in 2016

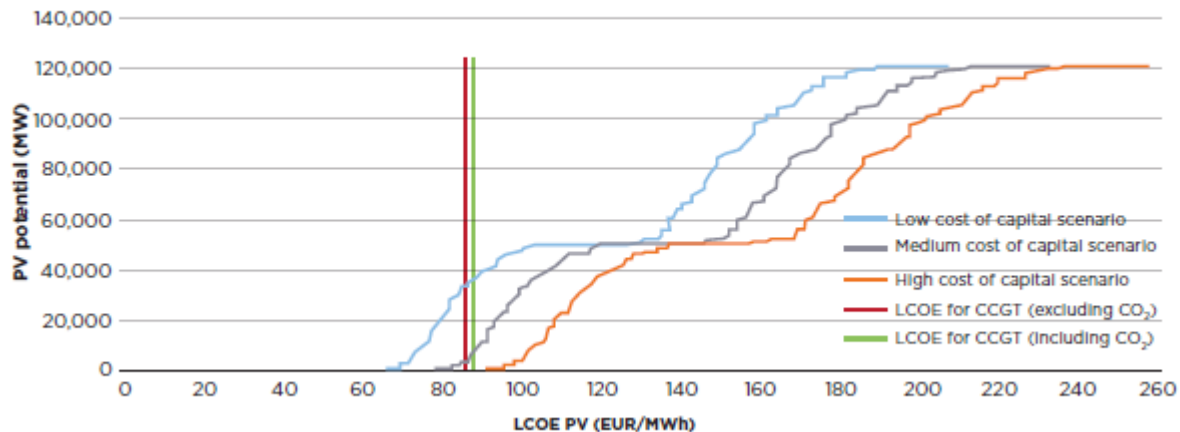
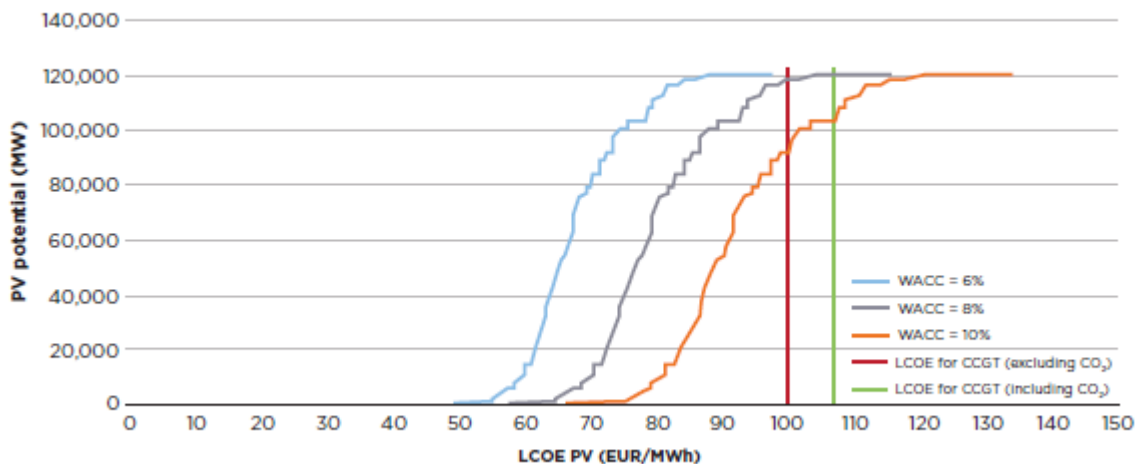
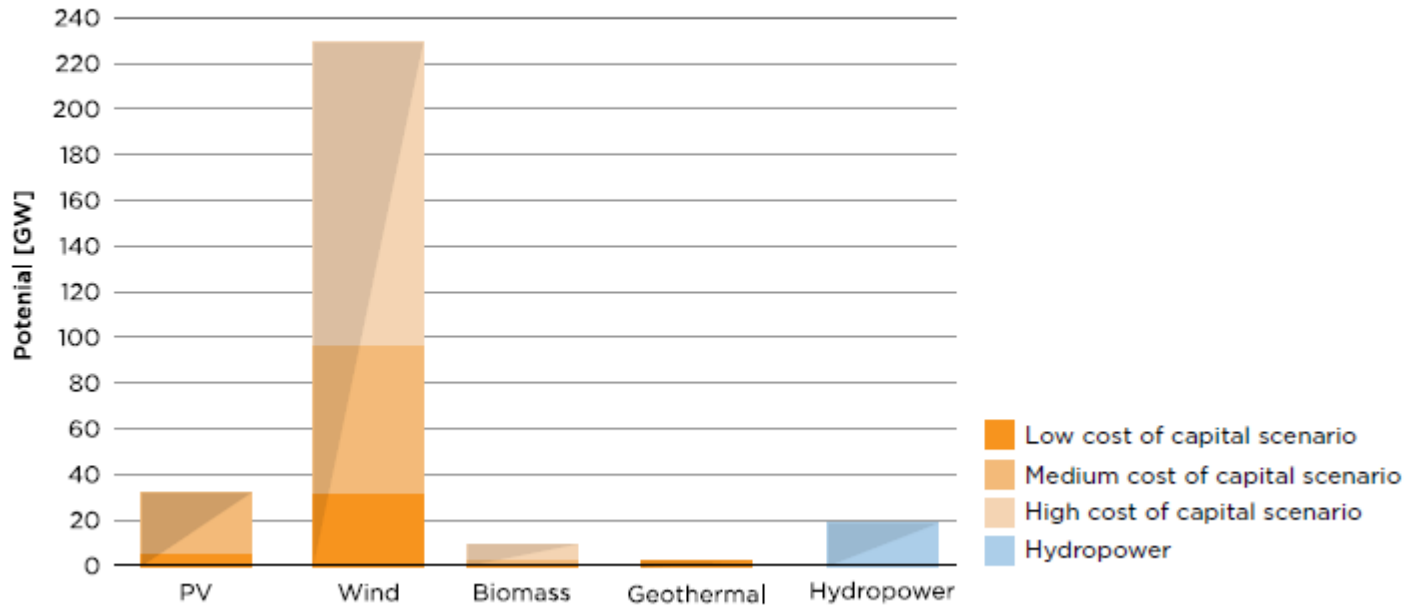


Figure 3.10: Cost-competitive solar PV potential in SEE in 2030



# Impact of cost of capital

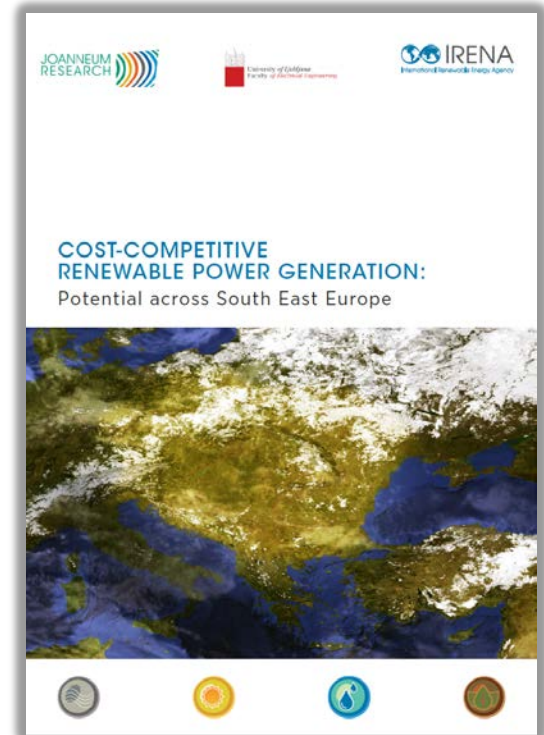
Figure 3.4: Cumulative additional cost-competitive renewable power potential for SEE In 2016 (292.7 GW)



- Eliminate administrative barriers and improve market access
- Create attractive and consistent RE support schemes
- Improve PPA structure
- Address grid integration challenges
- Enhance skills and capacities
- Facilitate access to finance



Thank you



**giz** Deutsche Gesellschaft  
für Internationale  
Zusammenarbeit (GIZ) GmbH

On behalf of:

 Federal Ministry for the  
Environment, Nature Conservation,  
Building and Nuclear Safety

of the Federal Republic of Germany

This project is part of the International Climate Initiative (IKI). The Federal Ministry for the Environment, Nature Conservation, Building and Nuclear Safety (BMUB) supports this initiative on the basis of a decision adopted by the German Bundestag.