

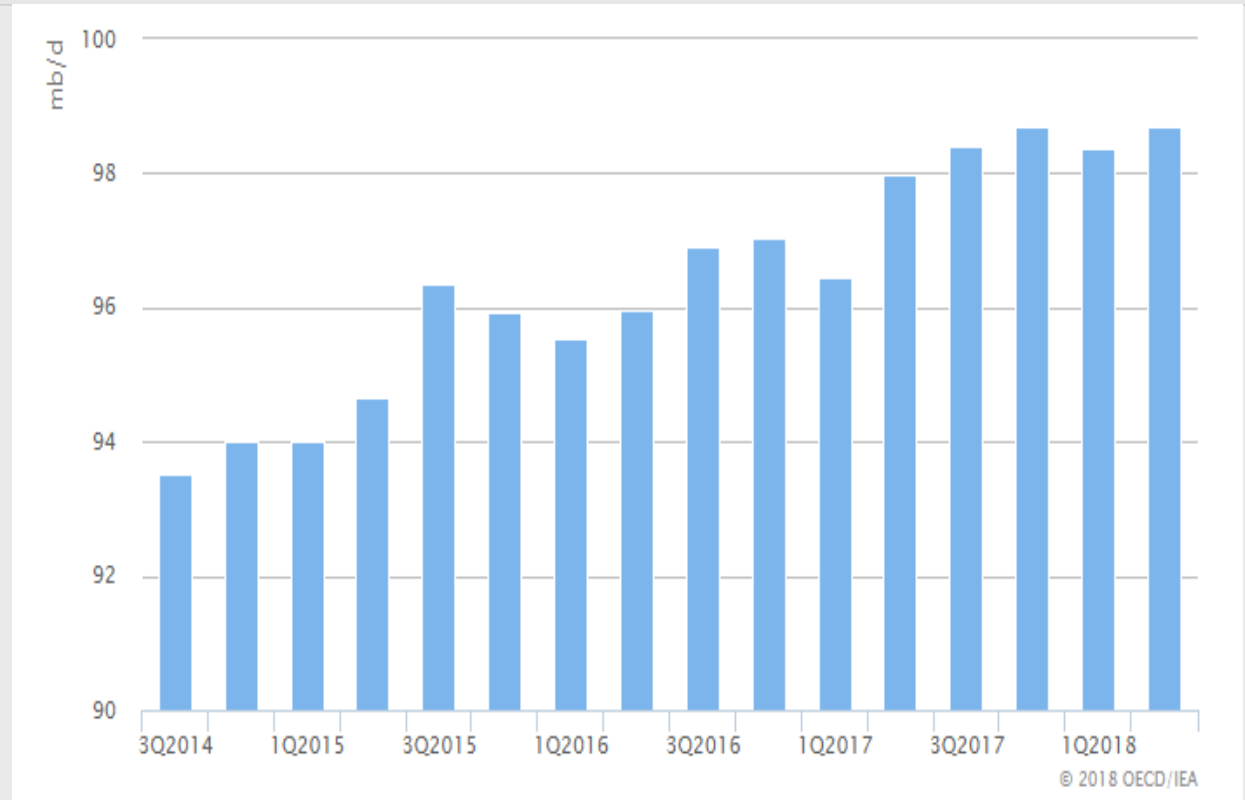


*Energy Community developments
Oil Forum 2018*

Gas Forum

World Oil Consumption and Demand

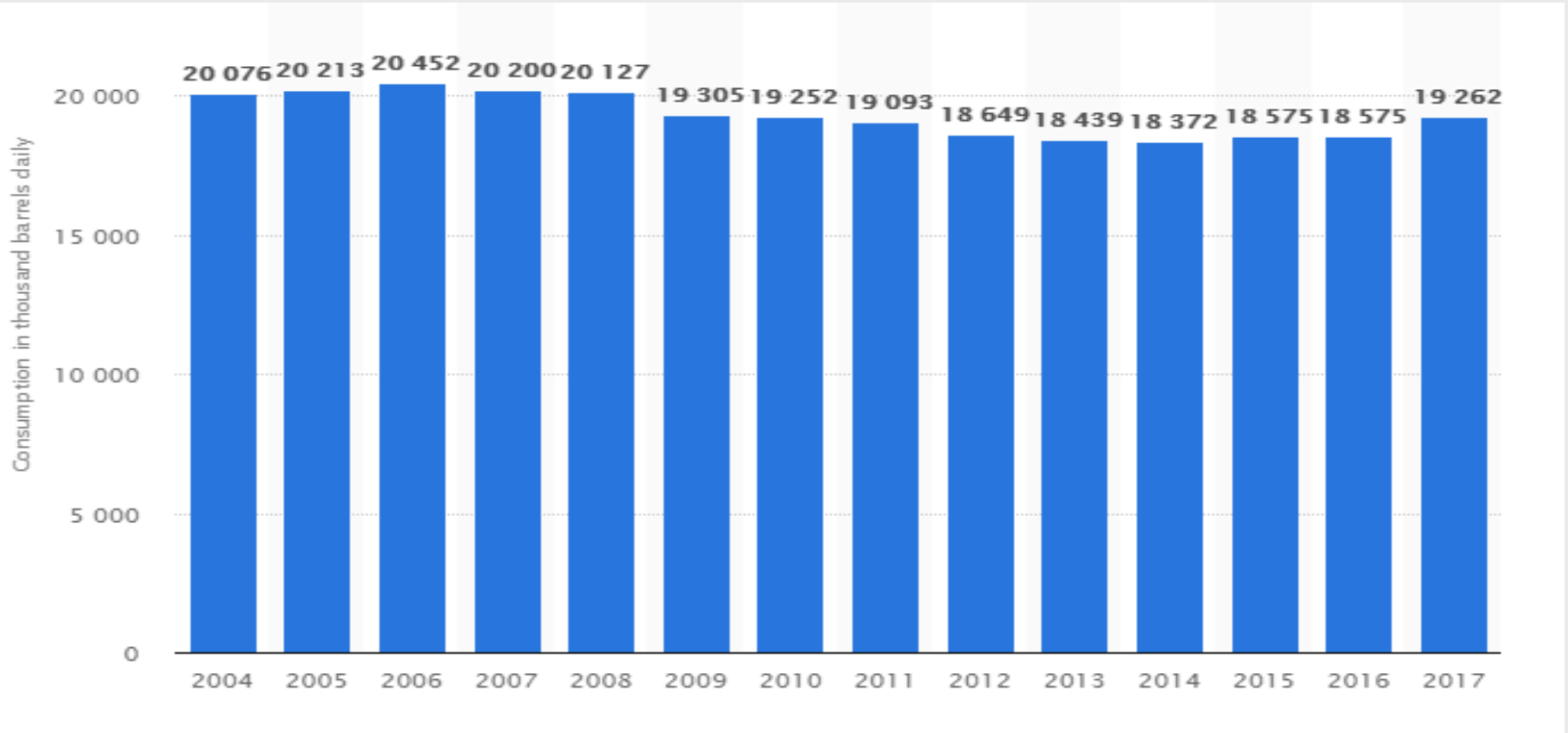
No	Top Ten Countries	Million bbl/day
1	United States	20.3
2	China	12.1
3	Russia	6.4
4	India	5.4
5	Japan	3.4
6	S. Korea	3.3
7	S. Arabia	2.9
8	Germany	2.1
9	Canada	2.1
10	Brazil	1.8



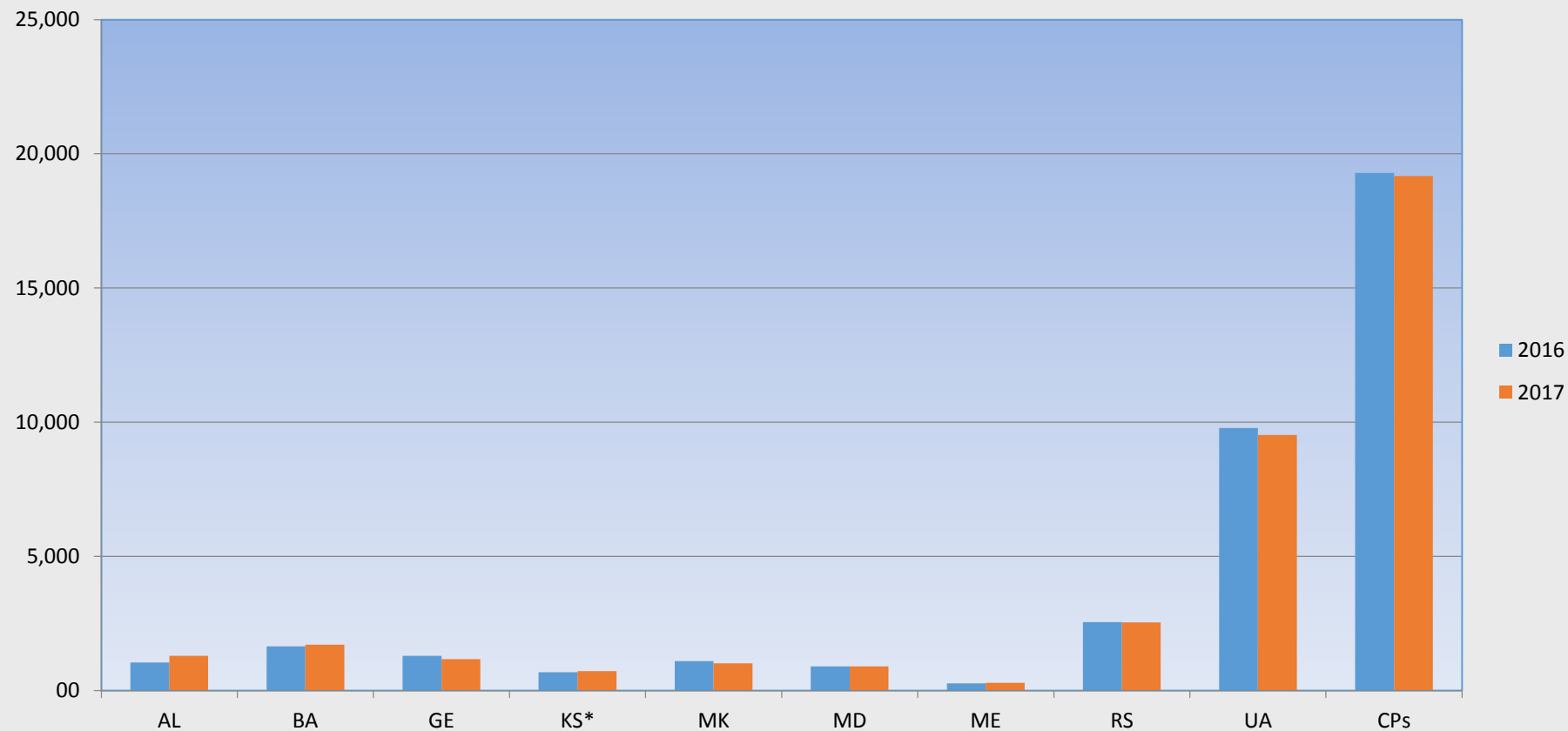
Consumption 2017

Demand 2014 - 2017

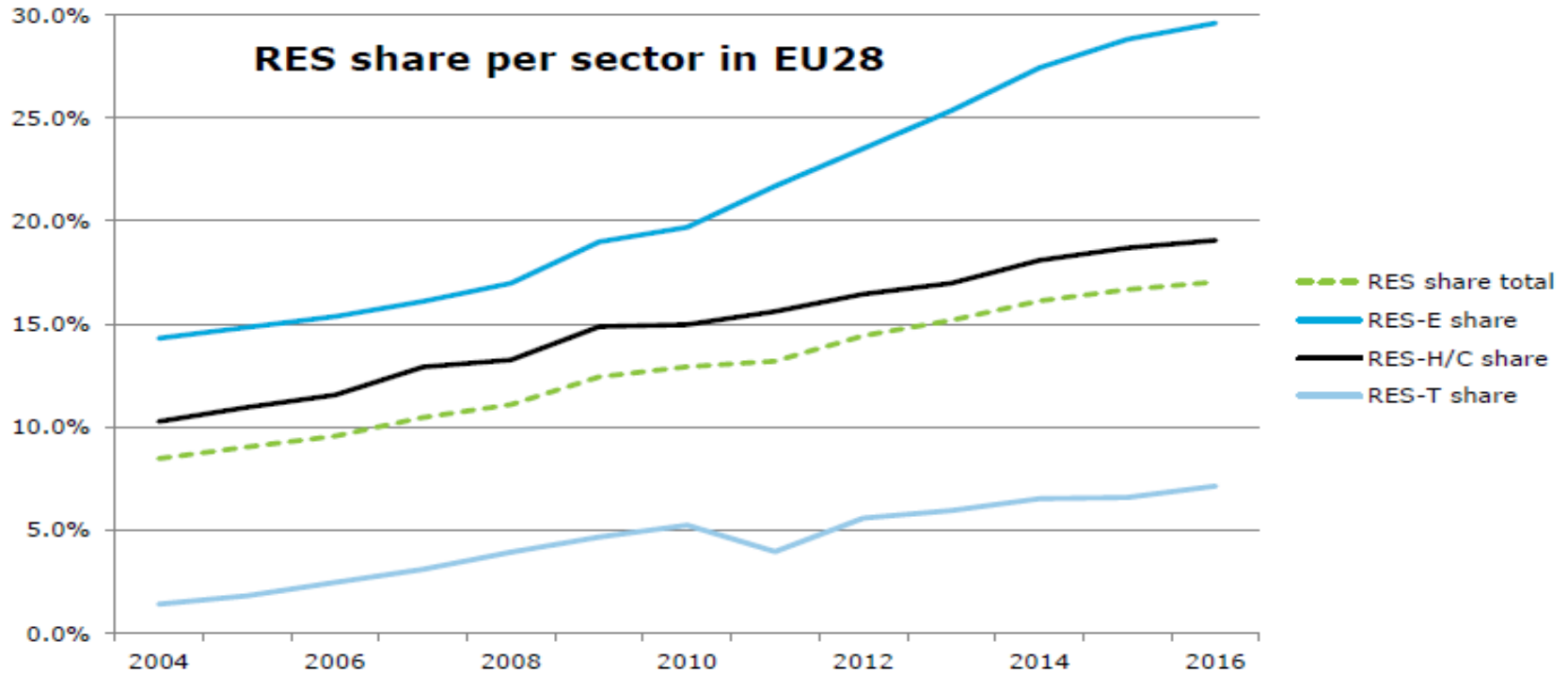
Oil Consumption in Europe



Oil Consumption in the Energy Community



STATE OF PLAY - PROGRESS BY SECTORS



Source: EUROSTAT Shares 2016

Energy Policy subordinated to Climate Policy

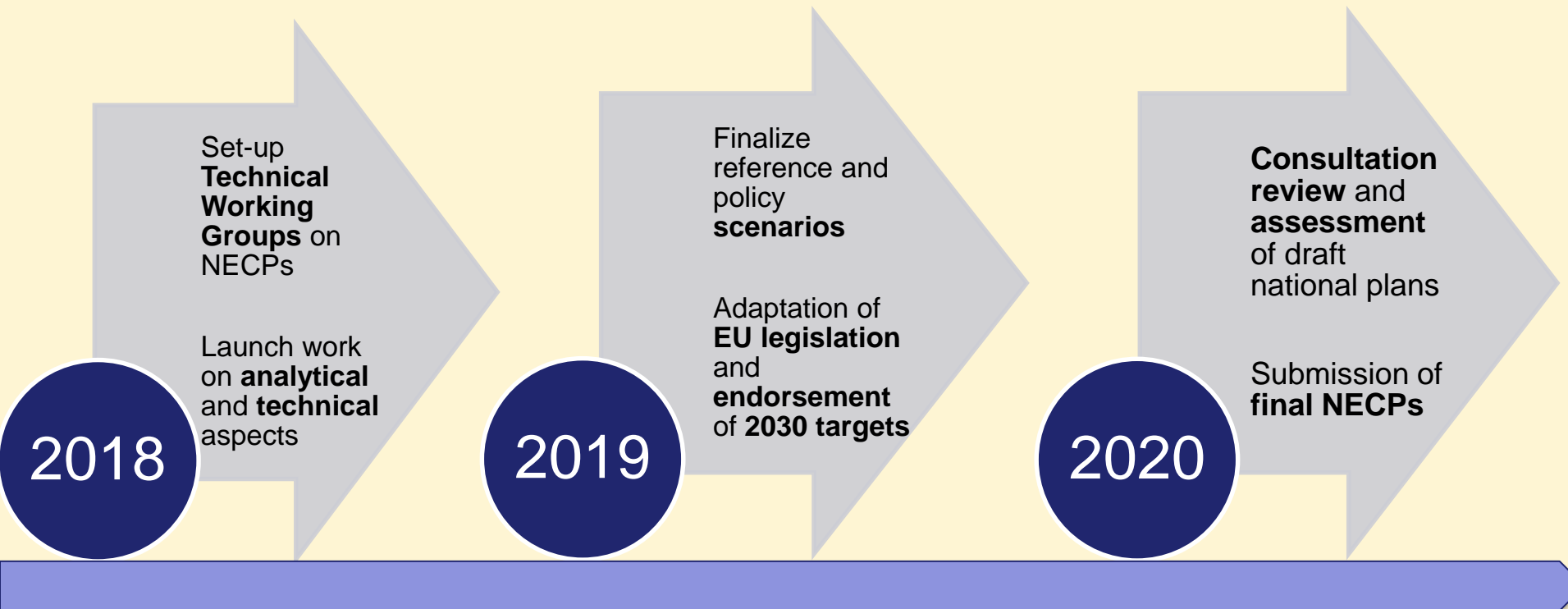


EU is adopting Governance Regulation;

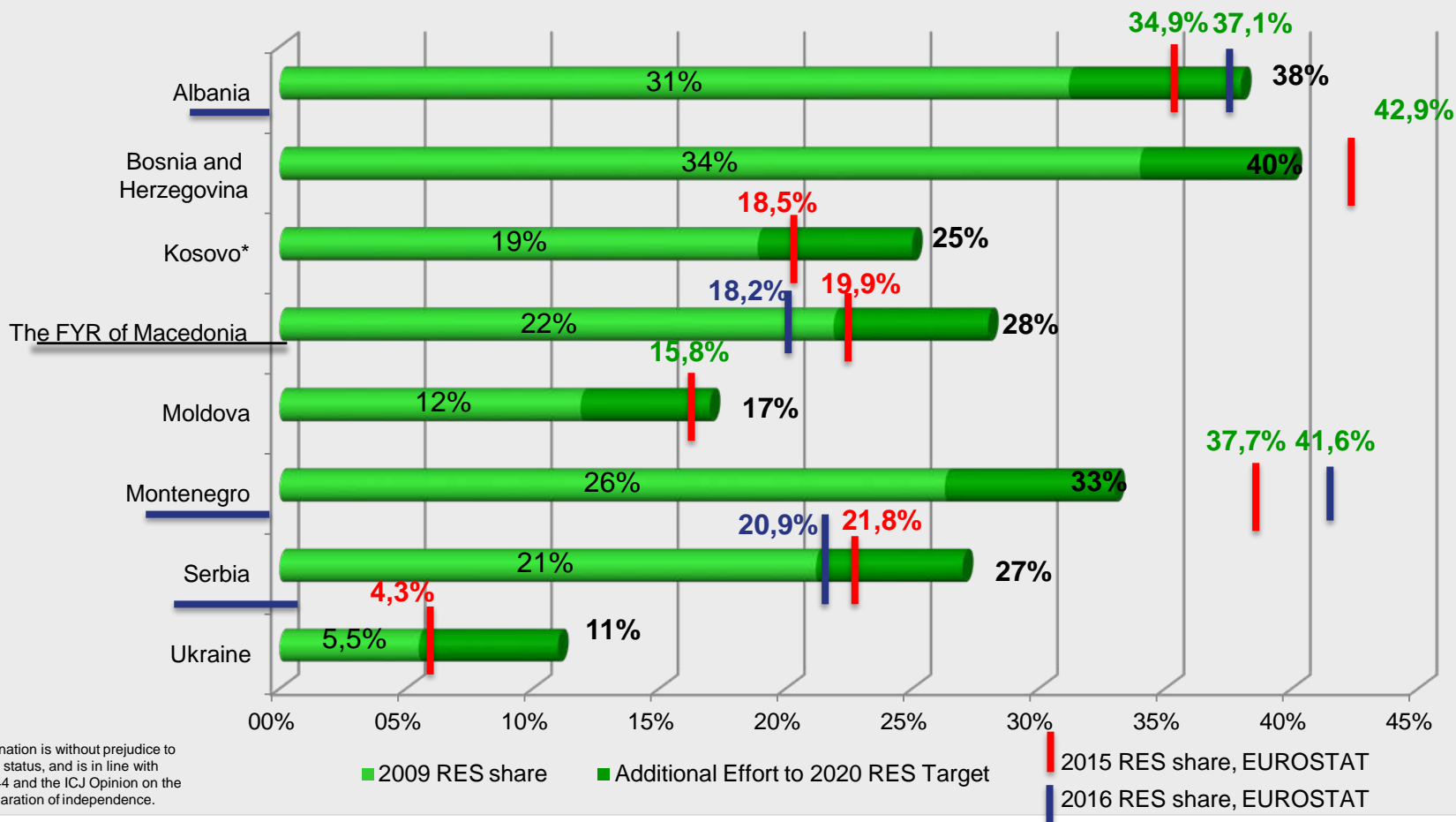
*Energy Community Ministerial Council in January 2018 adopted
Recommendation to adopt*

INTEGRATED ENERGY AND CLIMATE PLANS

PROCESS AND TIMELINE - EnC

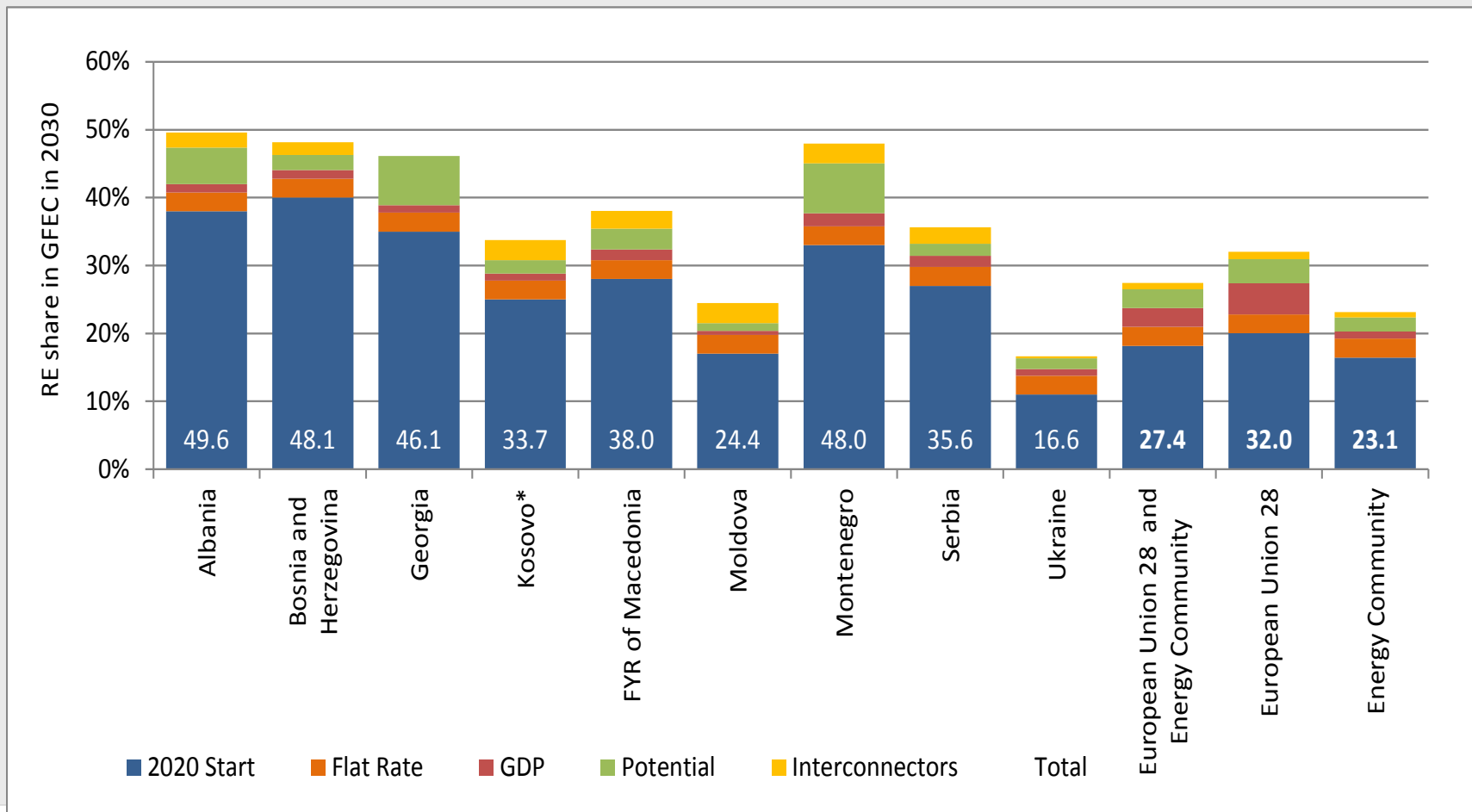


RES Target Progress I

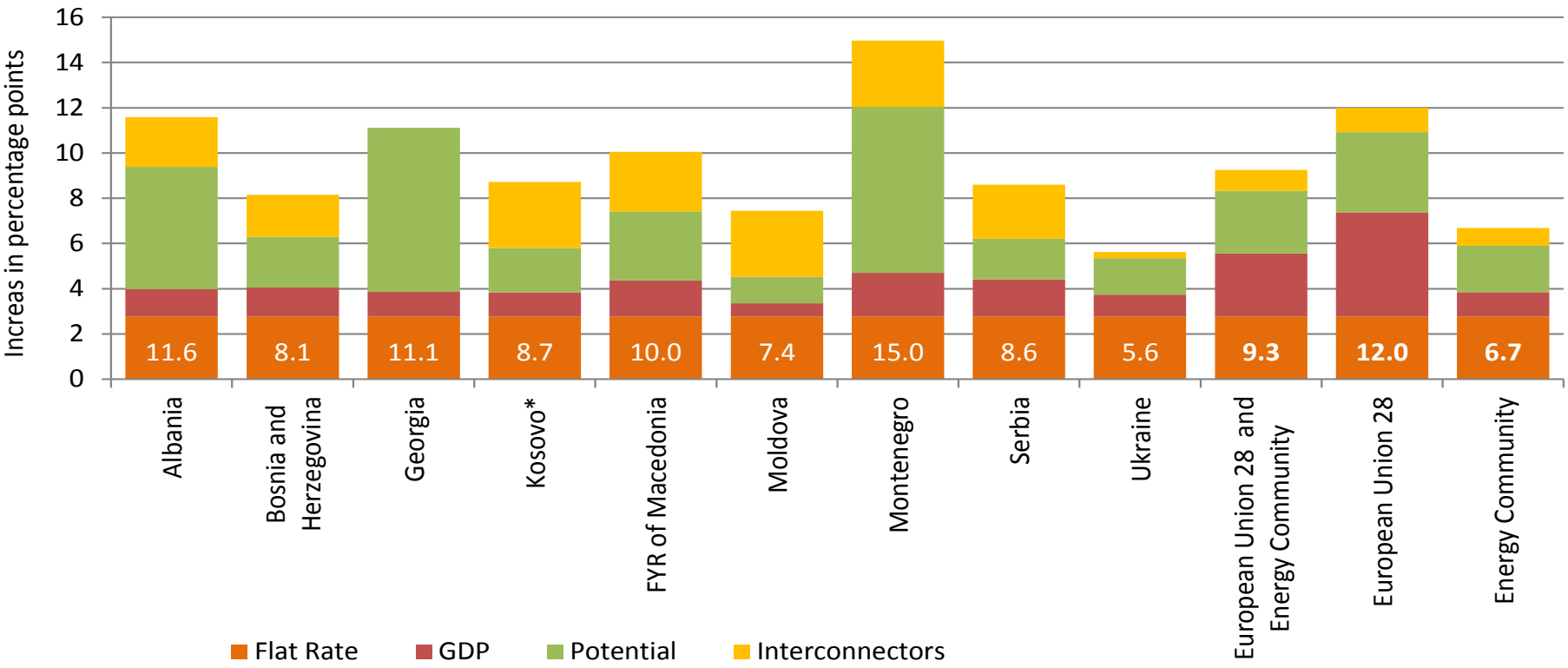


* This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

2030 RE Targets for all CPs and the EnC region according to the proposed target setting approach

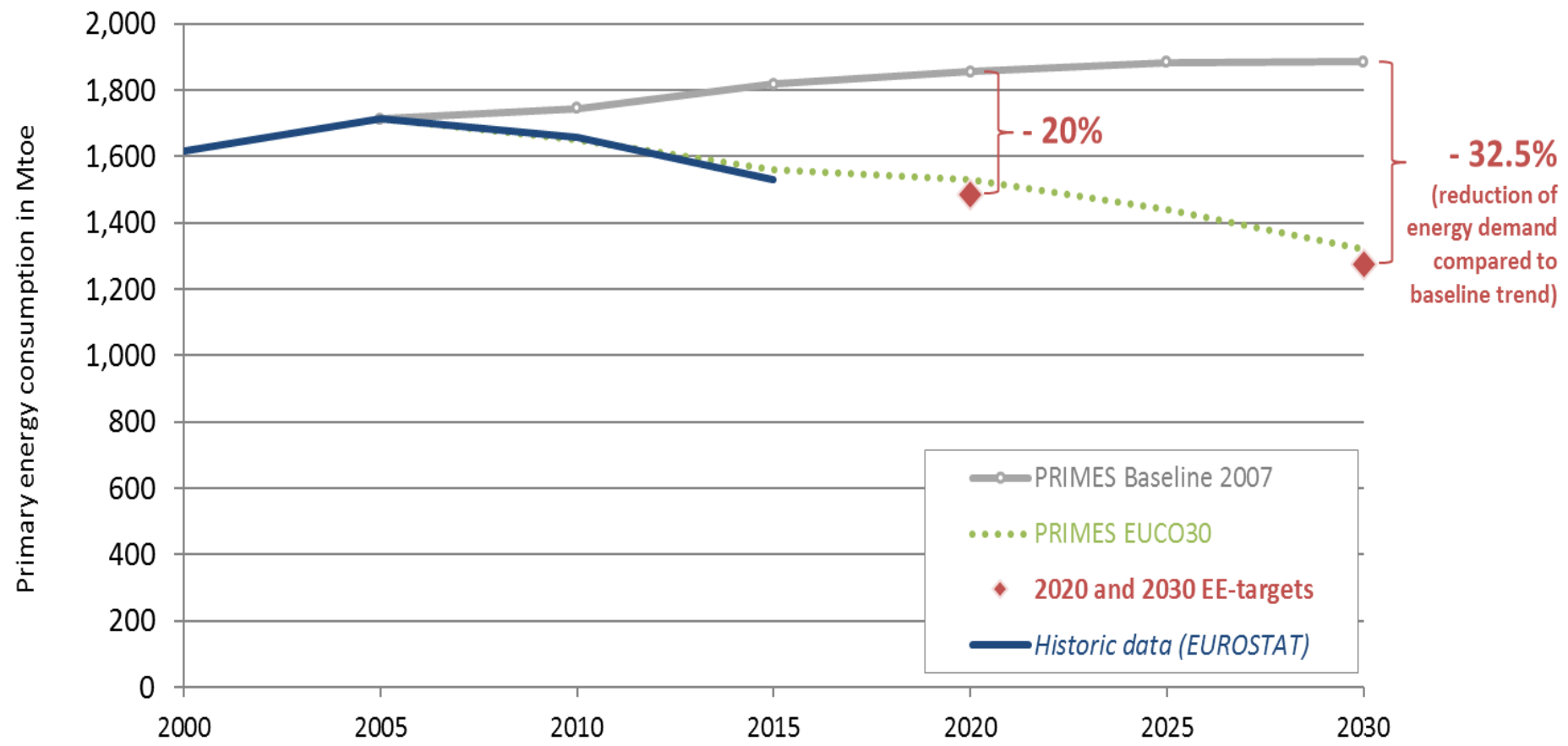


PROPOSED METHODOLOGY: RENEWABLES

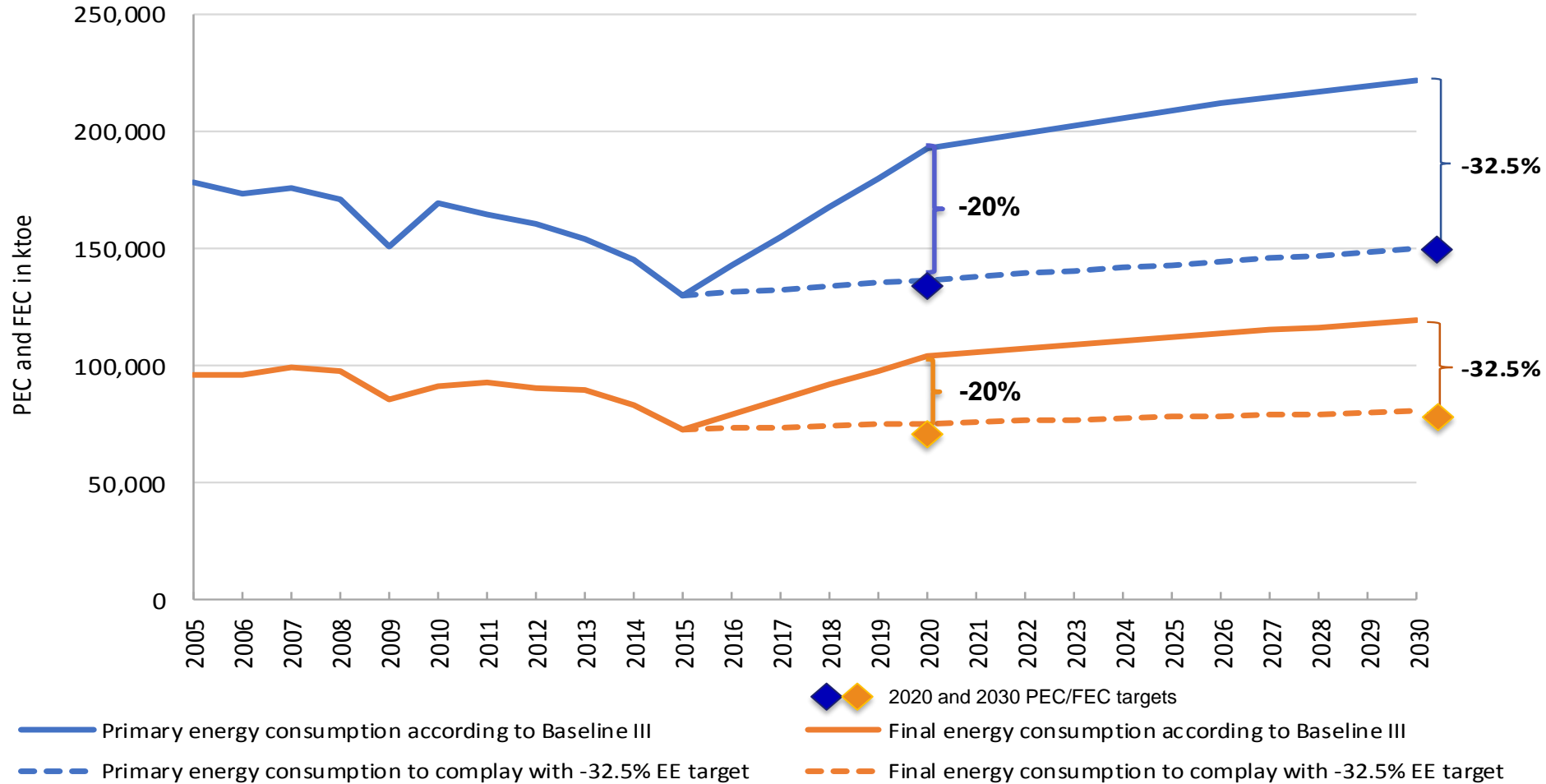


Resulting RE share net increase between 2020 and 2030 for all CPs and the EnC region according to the proposed target setting approach (Source: EUROSTAT, 2018; IEA, 2018; IMF, 2018; NTUA, 2012; study own calculations)

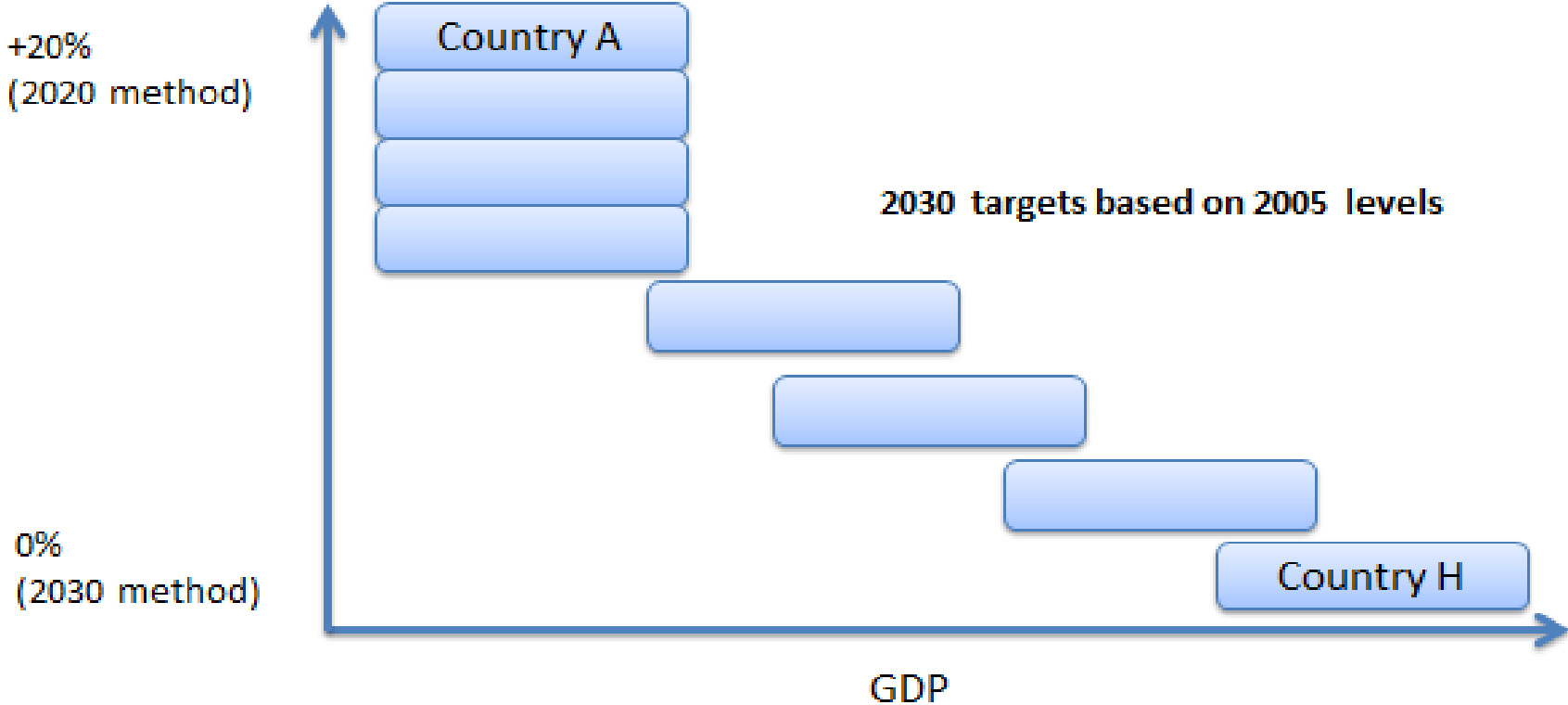
EU 2020 and 2030 EE TARGETS



EnC 2020 and 2030 EE TARGETS






PROPOSED METHODOLOGY: GHG



GDP based non-ETS target differentiation among CPs

- Directive 2009/73/EC & Directive 2009/72/EC
- Implementation deadline 1 January 2015 (31 December 2020 for Georgia)
- Network code on Interoperability and Data Exchange* and Guidelines on Congestion Management Procedures** (1 October 2018)

-  Third Package compliant law adopted
-  Draft law, adoption procedure advanced
-  Draft law exists



Treaty amendments (from 2016)??

*Reciprocity clause; switch off/on clauses;
New network codes direct implementation;
Better enforcement;
Competences in state aid and competition;
Several smaller adaptations.*



*Thank you
for your attention!*

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