

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







Regional Consultation Process



SEE Regional SEE Regional Consultation Workshop Meeting March 2016 October 2016 **SEE High Level SEE Regional** Meeting **Gap Analysis** January 2017 July-August 2016

SEE High-Level Meeting

Abu Dhabi, 13 January 2017



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

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.



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"(...) 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



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ABU DHABI COMMUNIQUÉ ON ACCELERATING THE UPTAKE OF RENEWABLES IN SOUTH EAST EUROPE

Heads of Delegation to the High-Level Meeting on Renewable Energy in South East Guraps, from Albania, Bosnia and Hersegovina, Crastia, Montenegro, the Republic sanges, such neutral surrice and semilar recognition under the members of mediana, floreanta and Serbia mel in Abu Dhabi, United Arab Grabates, on 13 January 2017, to discuss the challenges in South Earl Europe's transition to a suifainable energy future and to identify collaboration opportunities between the International Senseable Sheigr Agency (ISSNA) and the region for accelerated deployment of renewable energy:

The Heads of Delegation sheesed that the South Sost Europe region is consmitted to acoling up renewable energy; as energiged in the adoption of targets for 2000 and the development of National Benevable Energy Action Flore (NEGATE) to achieve higher levels of investment. They confirmed their governments' intention to further occelerate renewable energy development, in line with the 2000 Climate and Energy Policy Florestork for the European Union, adapted by the European Council in October 2014.

The Heads of Delegation emphasized angoing efforts across the segion to tracite the region challenges hindering renewable energy uptake and to create mass conductive

They noted that increasing deployment and continued technological innovation have led to sharp cost reductions and improved cost-effectiveness, particularly for solar photosolitic and wind energy. They also recognised the broader incorresconding impact of renewable energy deployment, dong with notable social-economic benefits. such as awaiting employment, developing local manufacturing capacity, avaiding health and environmental costs, and addressing climate change.

The Heads of Delegation took note of the results of ISBNA's publication, Cost-Compatitive Renewable Power Generation: Polential across South East Europe, which undersoone necessaries come was recovery of the control occurs and a surspense to the control occurs and the region's cost resource potential for hydroposes, who, so for PV and bloraces that can be deployed in a cost effective manner already today.

The Heads of Dalegation also commended ISSNA for scaling up its engagement to support afforts of occasioning deployment of renewobles in the region and, in this confeet, velocised the regional consultative process undertaken by IRBNA.

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



DRAFT ACTION PLAN TO SUPPORT RENEWABLE ENERGY DEVELOPMENT IN SOUTH EAST EUROPE

Despite a significant resource endowment, renewable energy development in South urages a agreeour resource encomment, retranded enlarge consequents in solution Gast Europe (SES)1 is still in its intoricy, accept for the large hydropower copocity mostly halolied several decodes ago, Out of the region's ourself installed power generation established streets concurse ages and or are engineers because enables onestate 30 GW, of which exceeds 62 piggments (CM), renewables constitute 30 GW, of which hydropower to be the Bon's share (close to 75%).

The South Sort Surope region has correntled to further deployment of renewables through the introduction of recessable energy targets for 2020 and the development of Notional Renewable Energy Action Flans (NEGATA). While some counties have already achieved their targets, others face challenges in meeting their obligations unless ourself renewable energy investment homeworks are alrengthened. The 2000 Clinicia and Energy Policy Promeson's for the European Union, adopted in October 2014, is expected to entral new commitments for the period to 2030.

The Internal land Renewable Energy Apency (RENA) 2017 publication, Cost-Compatitive Renewable Power Generatory Patental across South East Europe, underscores the region's high potential for further uptate of renewables, which could be deployed in a regions may powers or runner uprace or nemerations, which coust an experient and code-effective manuser bleady foday. The expert draws particular distribution to the voal unicopped polential for wind and solar photovoletics (PV), which can be taken high onederation by policy moters in the design of new long-term energy stategies and the revision of renewable energy action plans.

ISBNA concluded its regional analysis in order to identify the main barriers hindering further deployment and determine creas of action to support governments in efforts to overcome these borriers. To this end, needs and priorities have been identified for governments to strengthen the technical, policy, regulatory, shancial and institutional horsesorts and build institutional and human capacities resided to scale up renewables. This analysis was collated with the cunent and planned activities of the regional stateholders engaged in the tensevable energy sector, in order to ensure efficient use of resources and complementarily of actions on the ground.

An illustration are of the Latinovines, parts abbored in circles of above, provinces and extractive property of course accessed an inchessor and in force regardless and are referred as a course of the discourse of the discourse

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 <u>assessing the</u> renewable energy potential that can be deployed in a cost-competitive manner across South East Europe;





By SANDER + PARTNER Who else?



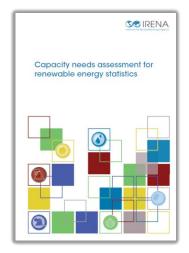




Supporting governments in the intended process of undertaking expected new commitments and developing long-term strategies for renewables, through the comprehensive <u>analysis of renewable energy markets</u> and the identification of feasible options for scaling up technology deployment in power generation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







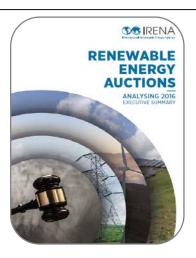
Raising awareness about <u>socio-economic benefits</u> and the impact of renewable energy development on end-user prices and affordability, as well as enhancing capacities for the <u>collection of reliable</u> <u>renewable energy data</u>, particularly for bioenergy;

Abu Dhabi Communiqué

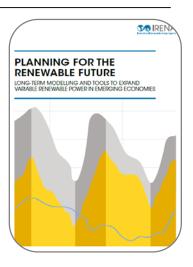
on Accelerating the Uptake of Renewables in South East Europe (2)



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 <u>integration of variable</u> renewable energy to power systems;



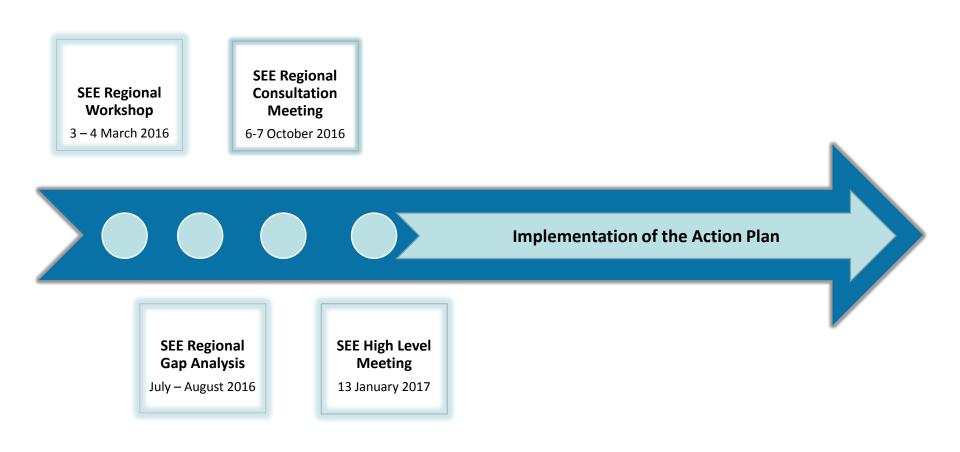
Promoting the use of the Project Navigator and Sustainable Energy Marketplace platforms to **improve the bankability of renewable energy projects and facilitate access to financial products** in the region, as well as sharing best practices and global experience on renewable energy finance and risk mitigation.





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



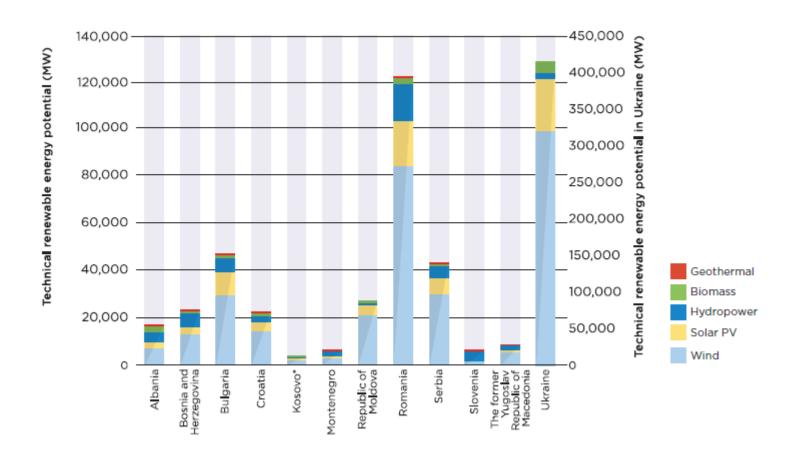
Technical potential



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).





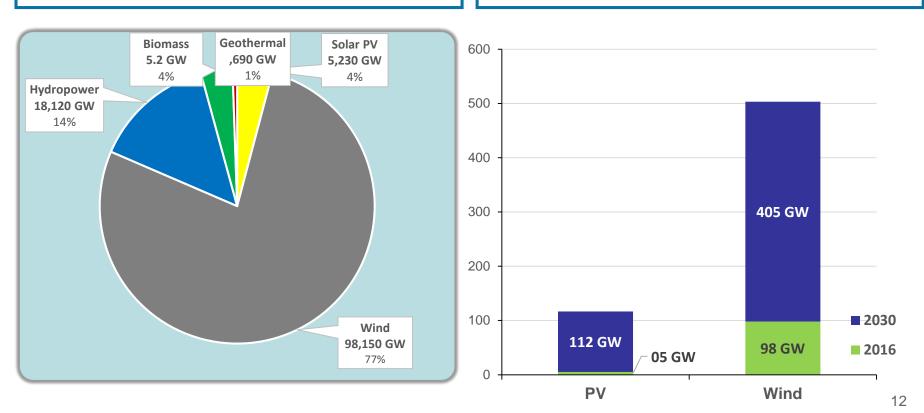
NREAP targets vs. Cost-competitive additional potential



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

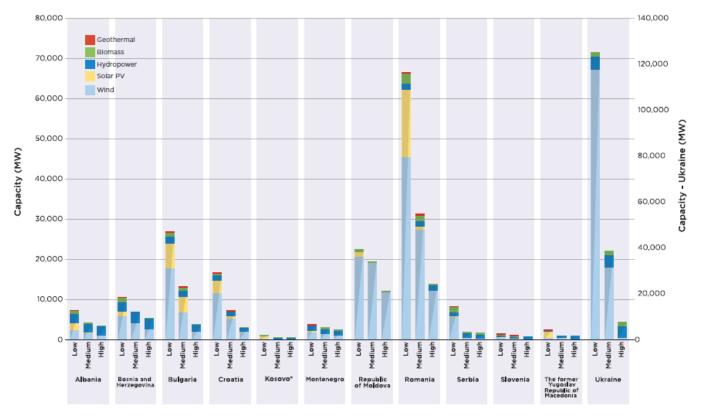
Additional cost-competitive RE potential



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).



SEE cost-competitive Wind potential

Figure 3.7 Cost-competitive wind potential in SEE in 2016

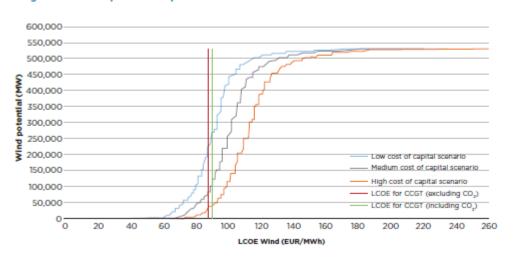
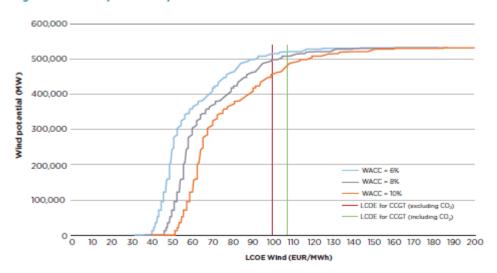


Figure 3.11: Cost-competitive wind potential in SEE in 2030



SEE cost-competitive solar PV potential



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

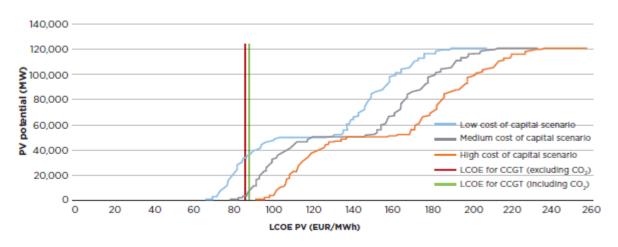
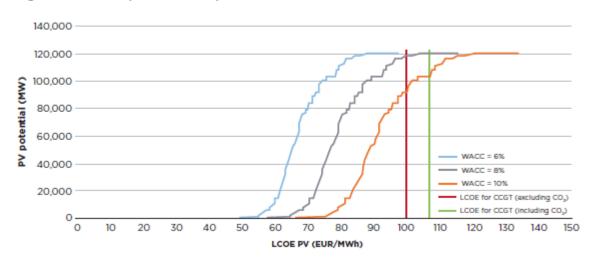


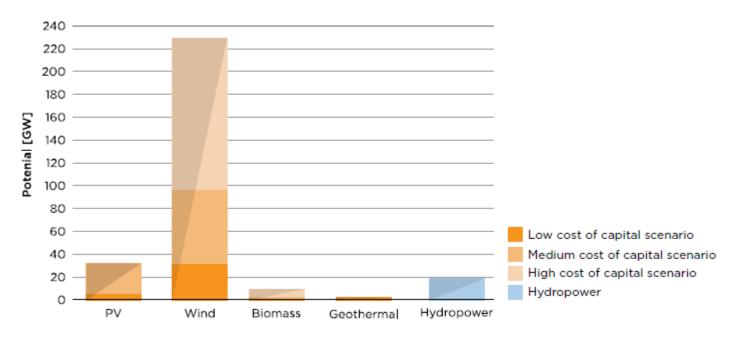
Figure 3.10: Cost-competitive solar PV potential in SEE in 2030



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



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.