



# *Second Progress Report in the Promotion of Energy from Renewable Sources in the Energy Community*

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*4th RECG meeting  
Vienna, 20-21 November 2017*



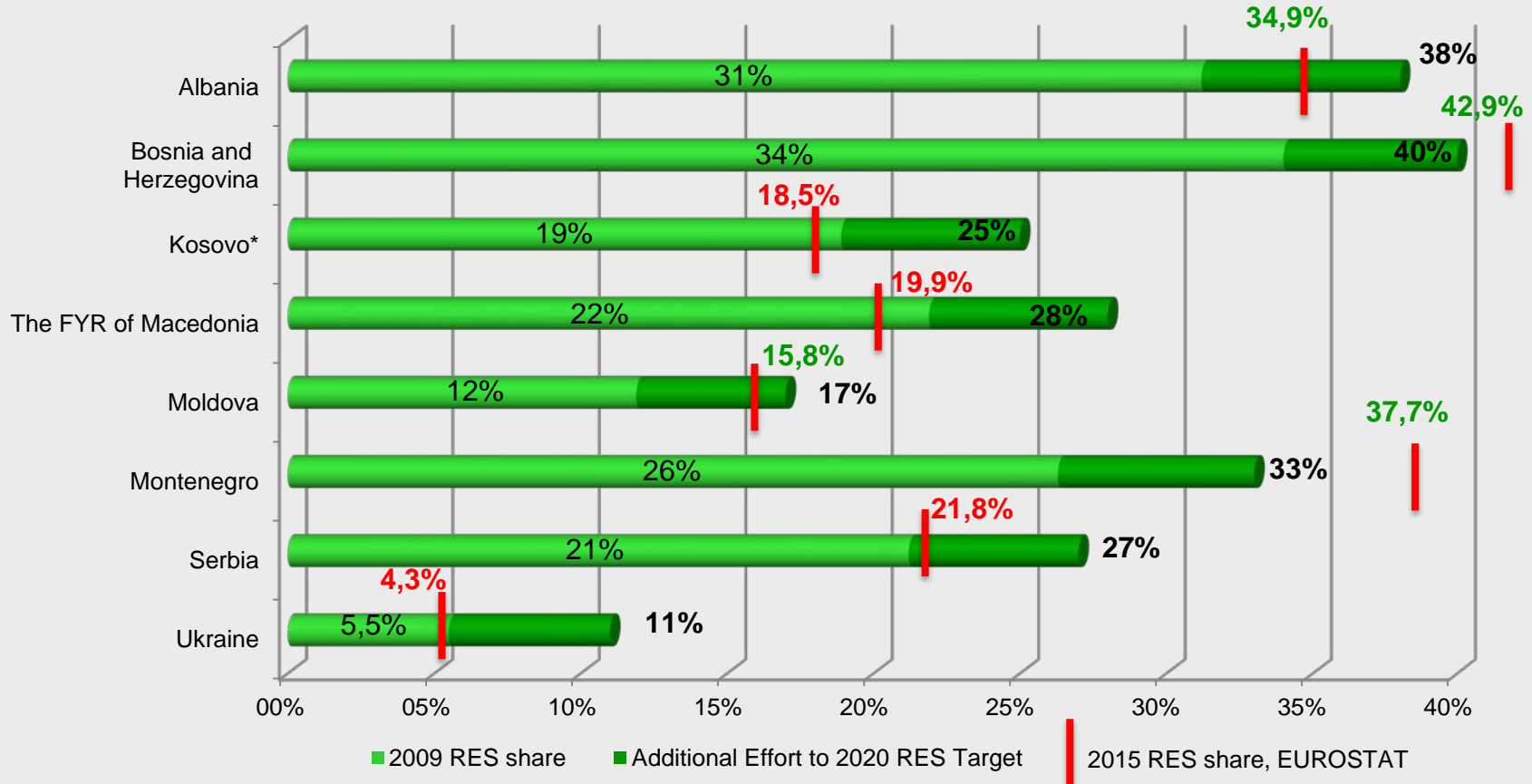
- *Adapted and adopted by Ministerial Council in October 2012 – Decision 2012/04/MC-EnC*
- *Implementation deadline - 1 January 2014*
- *Adoption of NREAP by 30 June 2013*
- *Submission of Progress Report by Contracting Parties by 31 December 2014 and every two years thereafter*
- *Secretariat monitor, review and submit an overall report to the Ministerial Council for the first time by 30 June 2015 and thereafter every two years*

Contracting Party	NREAP adopted	Second Progress Report 2014-2015
Albania	✓	✓
Bosnia and Herzegovina	✓	✓*
Kosovo*	✓	✓
Former Yugoslav Republic of Macedonia	✓*	✓
Moldova	✓	✓
Montenegro	✓	✓
Serbia	✓	✓
Ukraine	✓	✓

\* NREAP not designed to meet 28% target in 2020, \* NREAP of Bosnia and Herzegovina submitted on 17 November 2017

\* 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.

# Monitoring the progress in the promotion of the use of energy from renewable sources – Second Progress Report



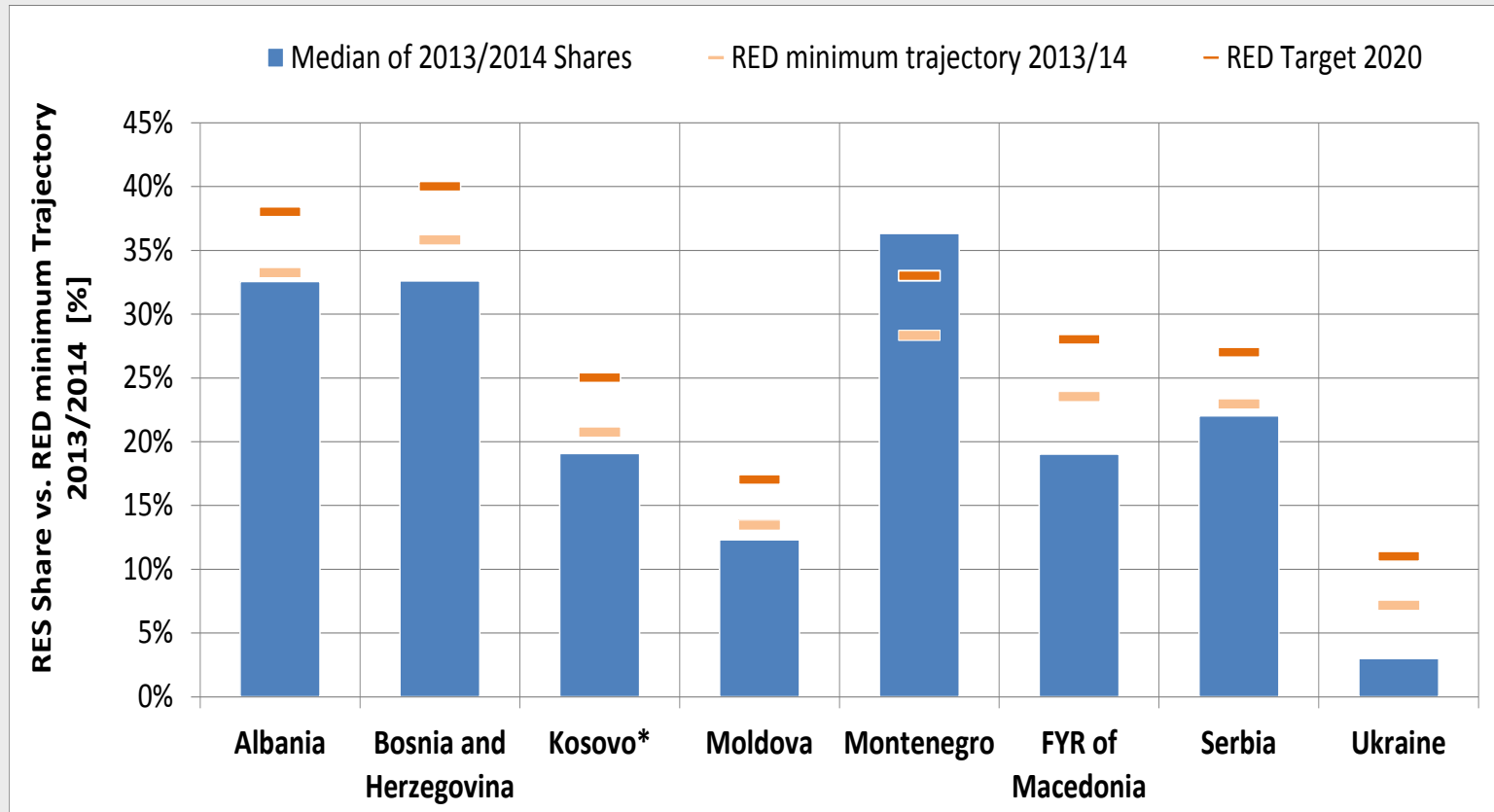


## **Significant progress made in the implementation of acquis on energy statistics and EUROSTAT methodology since 2013**

*However inconsistencies persists:*

- *Bosnia and Herzegovina have not integrated revised biomass data in the energy balance 2009-2013*
- *Energy balance of Moldova not consistent*
- *Ukraine has not conducted yet biomass consumption surveys*
- *Calorific value of firewood is an contentious issue*
  - *Montenegro reported different data compared with energy balance in EUROSTAT*
  - *Biomass consumption surveys in Former Yugoslav Republic of Macedonia revealed lower baseline share in 2009 >>> NREAP reviewed but not meeting the 28% RES target in 2020*

# Progress towards the trajectory



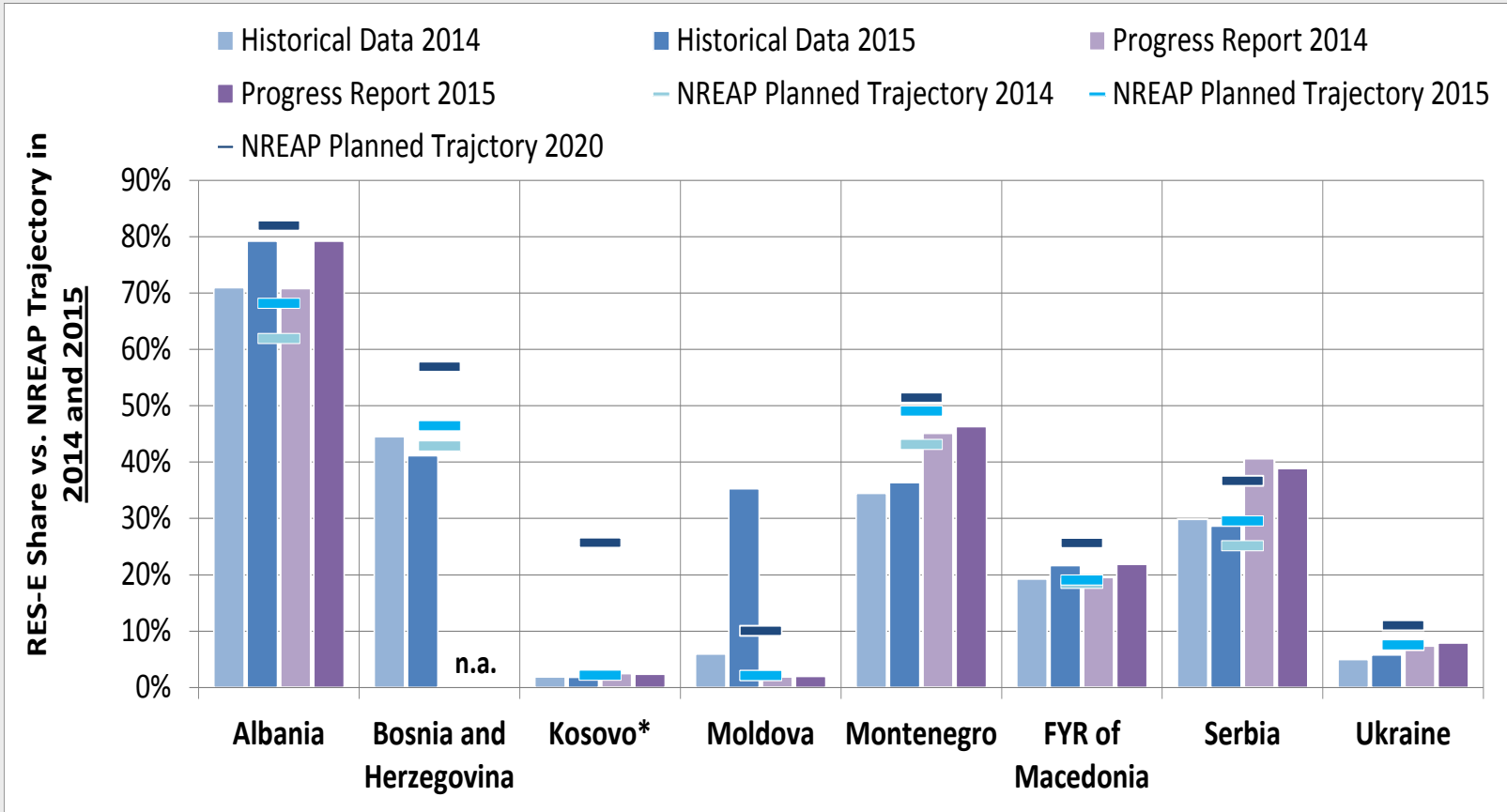
Source: kmbdg

# Progress in the promotion of the use of energy from renewable sources – Second Progress Reports



The median RES share in gross final energy demand by 2013/2014	RES share as of EUROSTAT data provided by the ECS	RED indicative trajectory (RED)		Percentage points deviation of indicative trajectory (RED)	
		Median 2013/2014	2020 Target	Median 2013/2014	2020 Target
<i>Contracting Party</i>	[%]	[%]	[%]	[pp]	[pp]
Albania	32.6%	33.2%	38%	-0.7%	-5.4%
Bosnia and Herzegovina	32.6%	35.8%	40%	-3.2%	-7.4%
Kosovo*	19.1%	20.7%	25%	-1.6%	-5.9%
Moldova	12.3%	13.4%	17%	-1.1%	-4.7%
Montenegro	36.3%	28.3%	33%	8.0%	3.3%
FYR of Macedonia	19.0%	23.5%	28%	-4.5%	-9.0%
Serbia	22.0%	22.9%	27%	-0.9%	-5.0%
Ukraine	3.0%	7.2%	11%	-4.1%	-8.0%

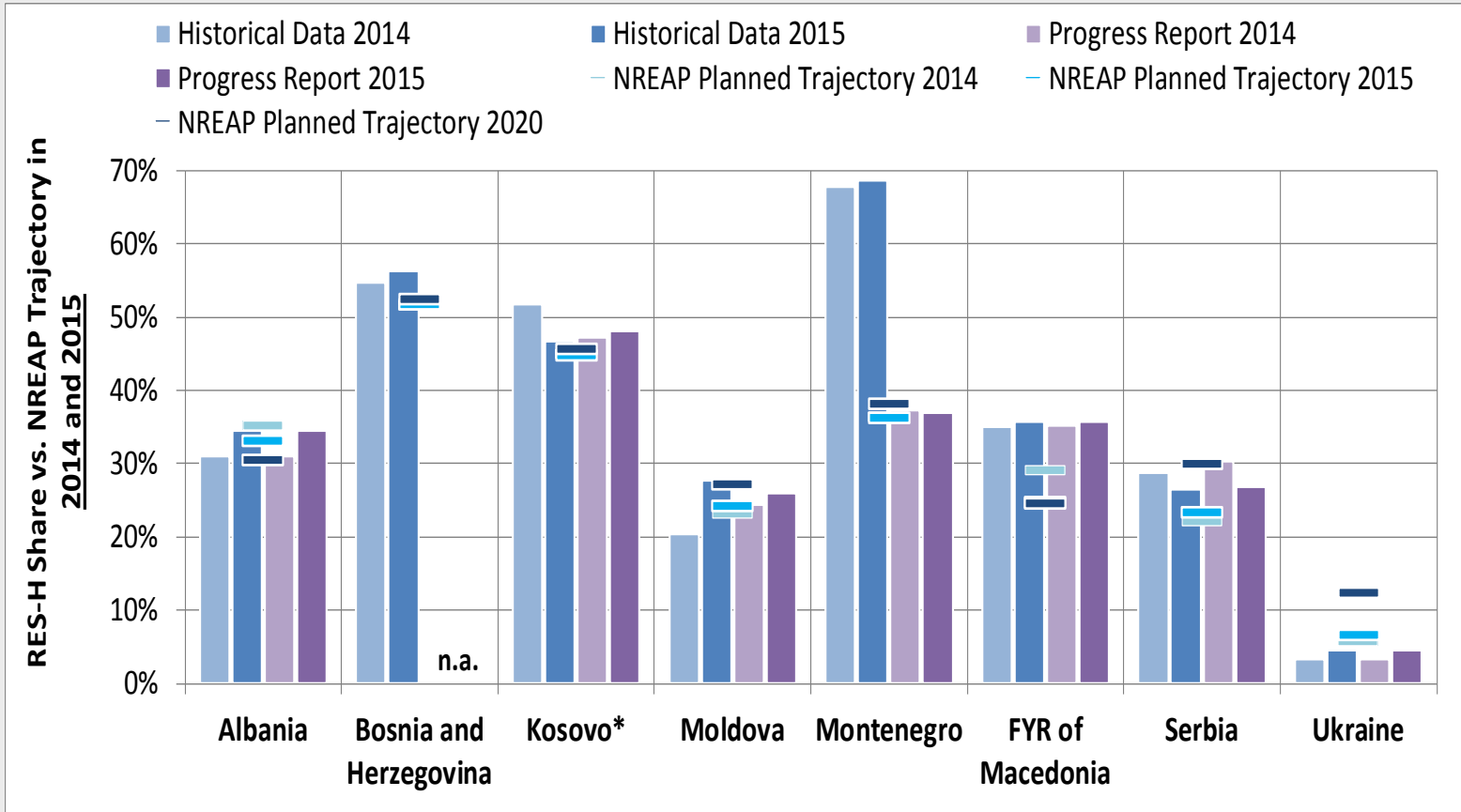
# RES-E shares in 2014 and 2015



Source: kmbdg

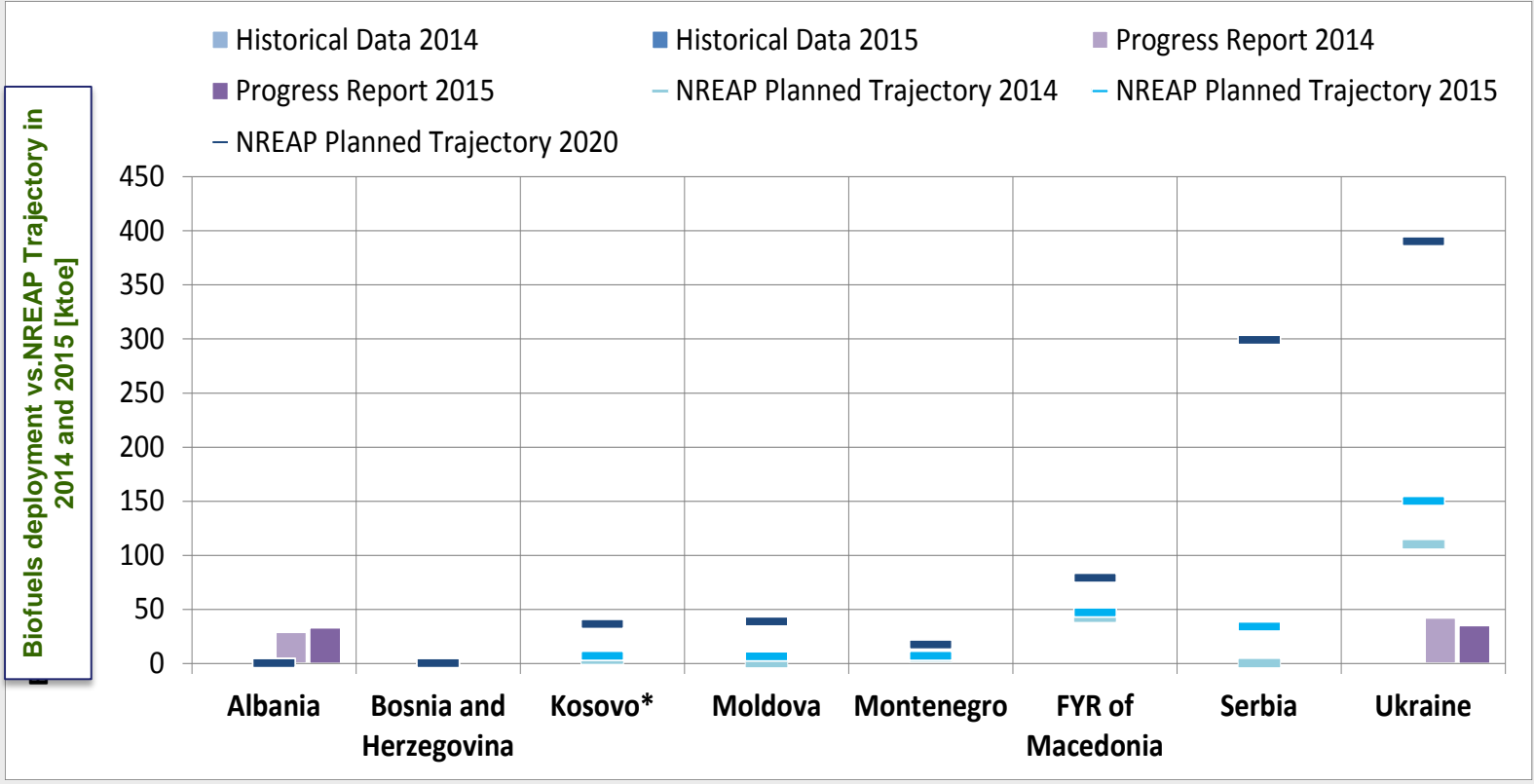


# RES-H shares in 2014 and 2015



Source: kmbdg

# Biofuels deployment in 2014 and 2015



Source: kmbdg



**Albania** – new law or amendments to existing (never) enforced?

**Bosnia and Herzegovina** – entity or state level?

**fYR of Macedonia** – RES-T package prepared by consultant 2 years ago

**Georgia** – to worm up and start

**Kosovo\*** - waiting to fossil sector law to be approved

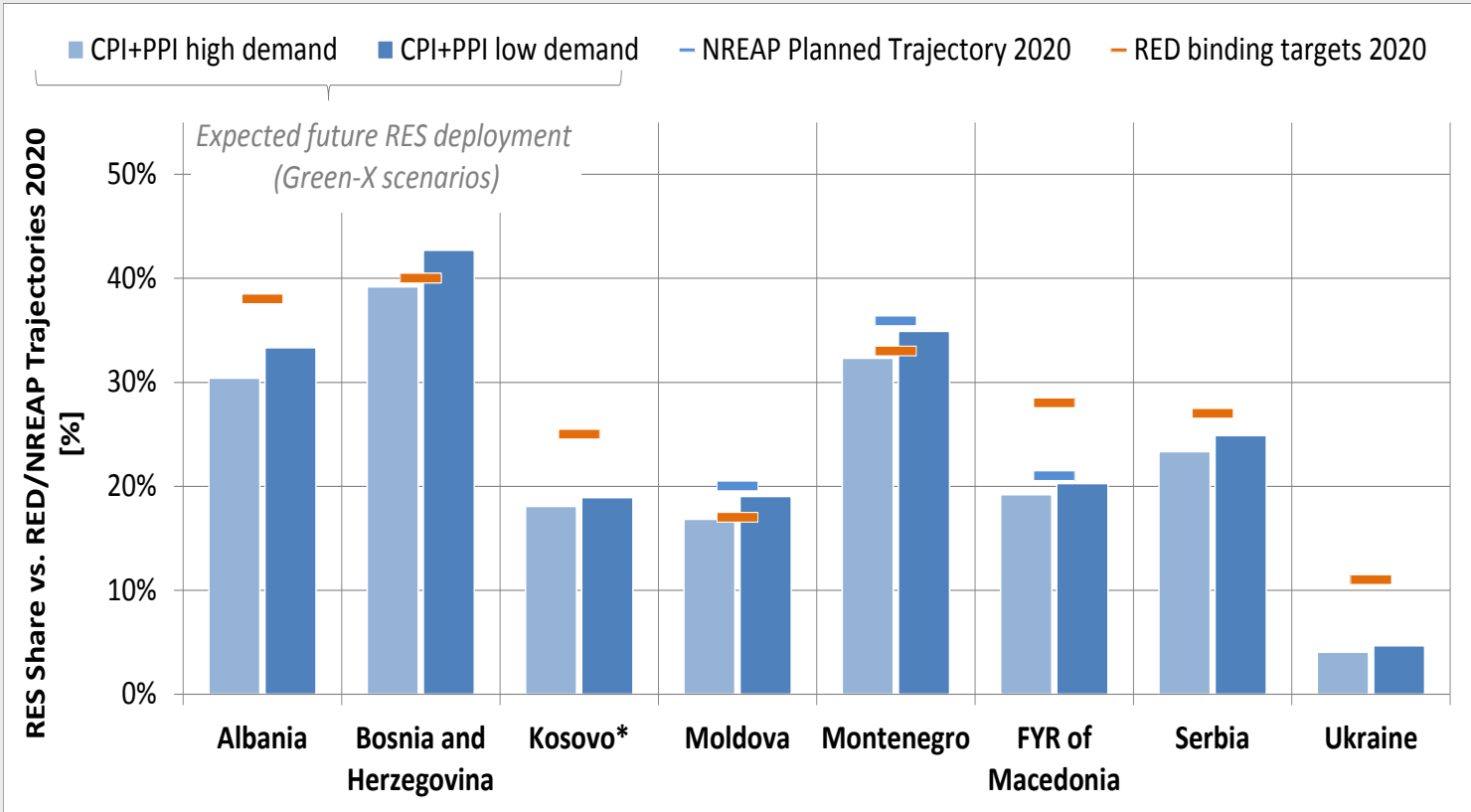
**Moldova** - ?

**Montenegro** – consultancy ongoing

**Serbia** - ?

**Ukraine** – different (competitive) drafts around....

# Expected RES share in 2020



Current Policy Initiatives (CPI)  
 Planned Policy Initiatives (PPI)

Source: kmboq

*Bosnia and Herzegovina, Moldova and Montenegro are expected to reach the binding 2020 target with currently implemented and planned policy measures*

- *Albania, Kosovo\*, FYR of Macedonia, Serbia and Ukraine would fail to achieve their 2020 RES targets*
- *revised NREAPs would be required to be submitted by Kosovo\*, Serbia, and Ukraine*
- *a decision on triggering Article 16 of Decision 2012/04/MC-EnC should be made by the Ministerial Council in case of former Yugoslav Republic of Macedonia.*

# Integration of renewable energy in the market



- **State Aid Guidelines on Environmental Protection and Energy 2014-2020** – to ensure a cost-effective development of RES
  - *support granted based on competitive process, feed-in premium*
  - *RES integration in the market*
    - *electricity sold at market price + contract for difference*
    - *standard balance responsibility unless intraday market exists*
- **A market fit for renewable energy**
  - *DAM, ID, Futures, Balancing*
  - *Access to and connection to the grids*
- **Renewable Energy Self-consumption**

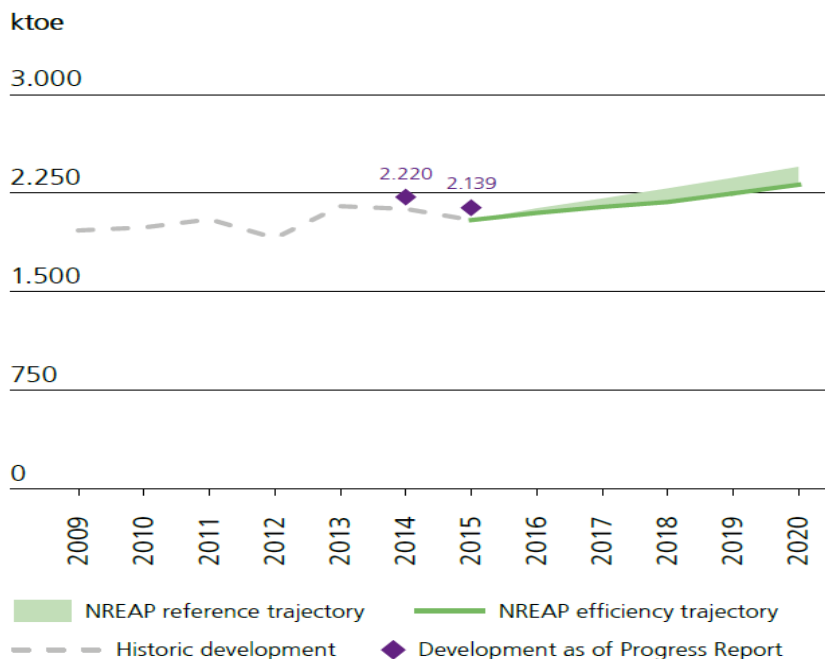
# The way forward



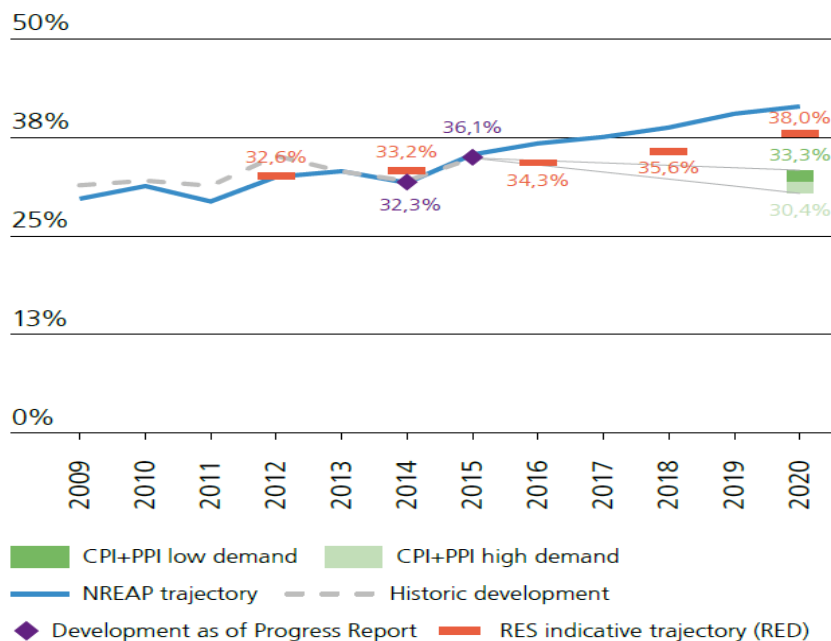
- *The Secretariat and EBRD will publish Policy Guidelines on Introduction Renewable Energy Auctions in the Energy Community;*
- *Assist the Contracting Parties with tailor-made auctions documents;*
- *Assist with the selection of winning bids and publish the results, if required;*
- *Analyse the auction process and lessons learnt;*
- *Identify the RES demand and publish an auction calendar for the next 2-3 years;*

# Albania – Forecast of 2020 target achievement

### Evolution and Forecast of Gross Final Energy Consumption in Albania (2009-2020)



### Evolution and Forecast of Renewable Energy Share in Gross Final Energy Consumption of Albania (2009-2020)

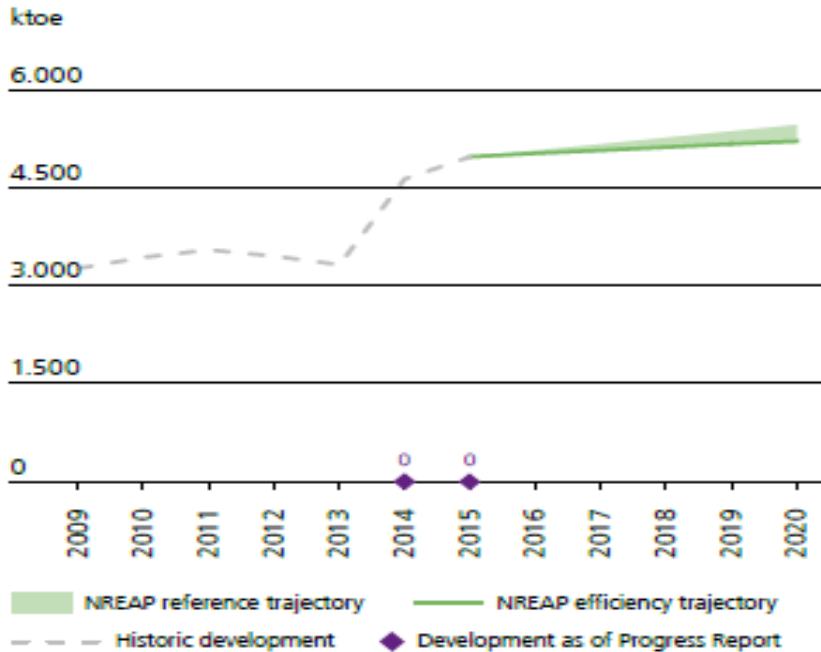


Source: Technical University Vienna, Assessment of the Progress in the Promotion and Use of Renewable Energy in the Energy Community, July 2017

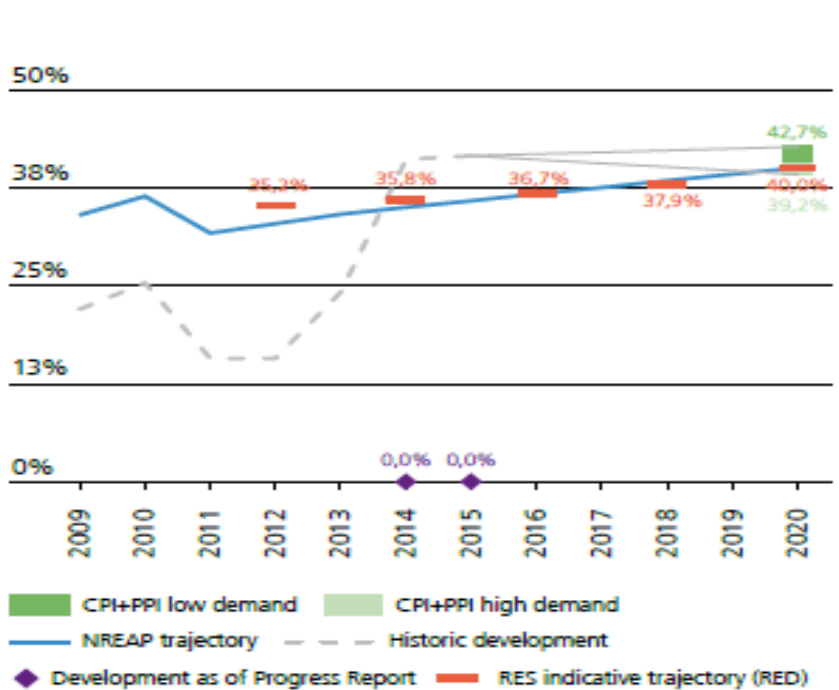


# BiH – Forecast of 2020 target achievement

**Evolution and Forecast of Gross Final Energy Consumption in Bosnia and Herzegovina (2009-2020)**

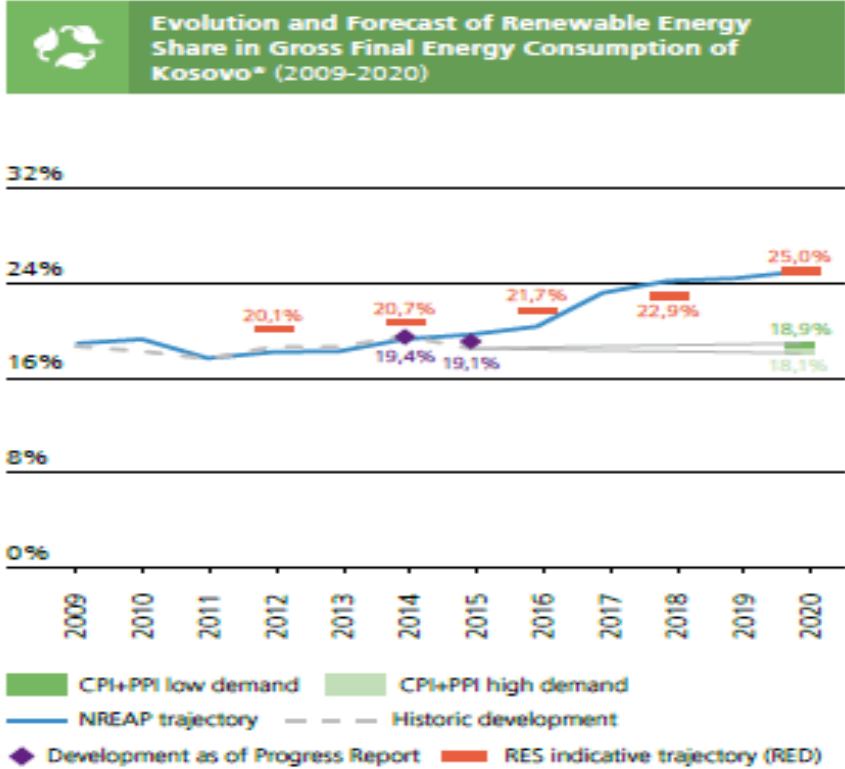
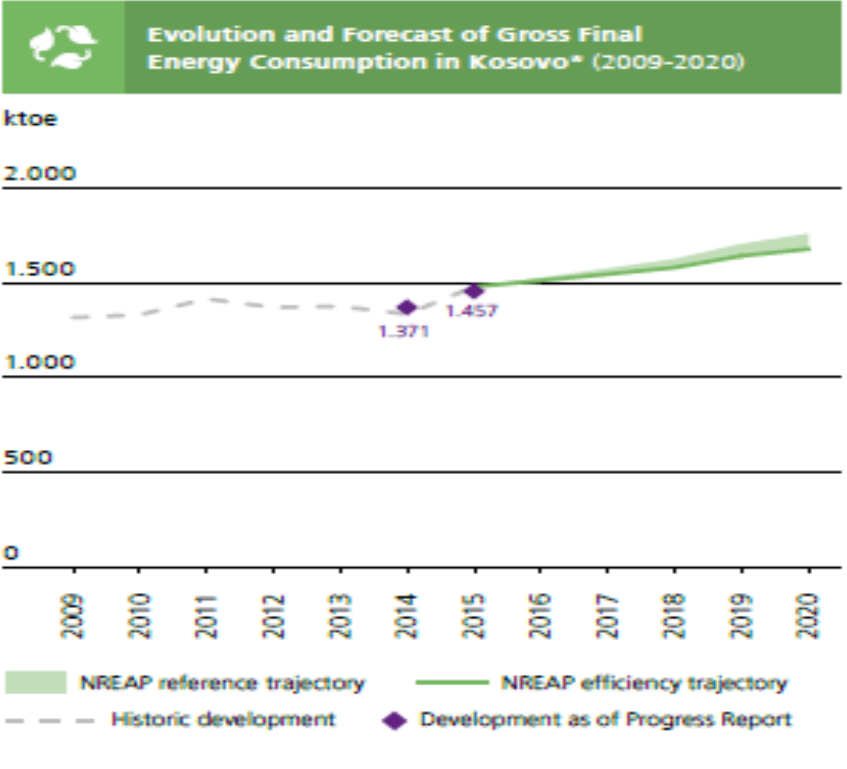


**Evolution and Forecast of Renewable Energy Share in Gross Final Energy Consumption of Bosnia and Herzegovina (2009-2020)**



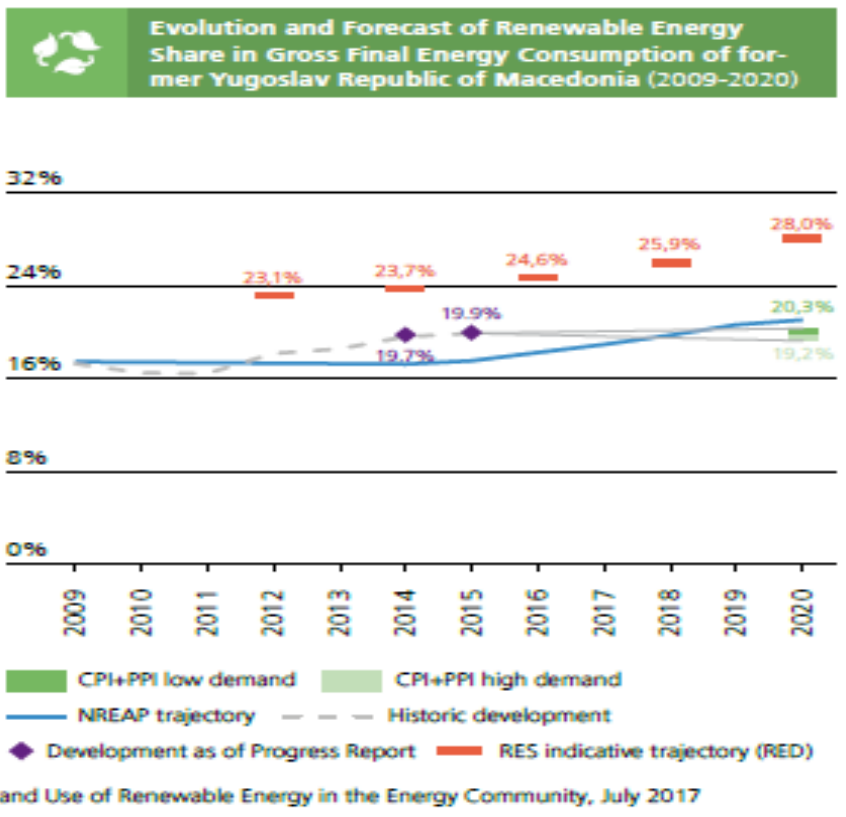
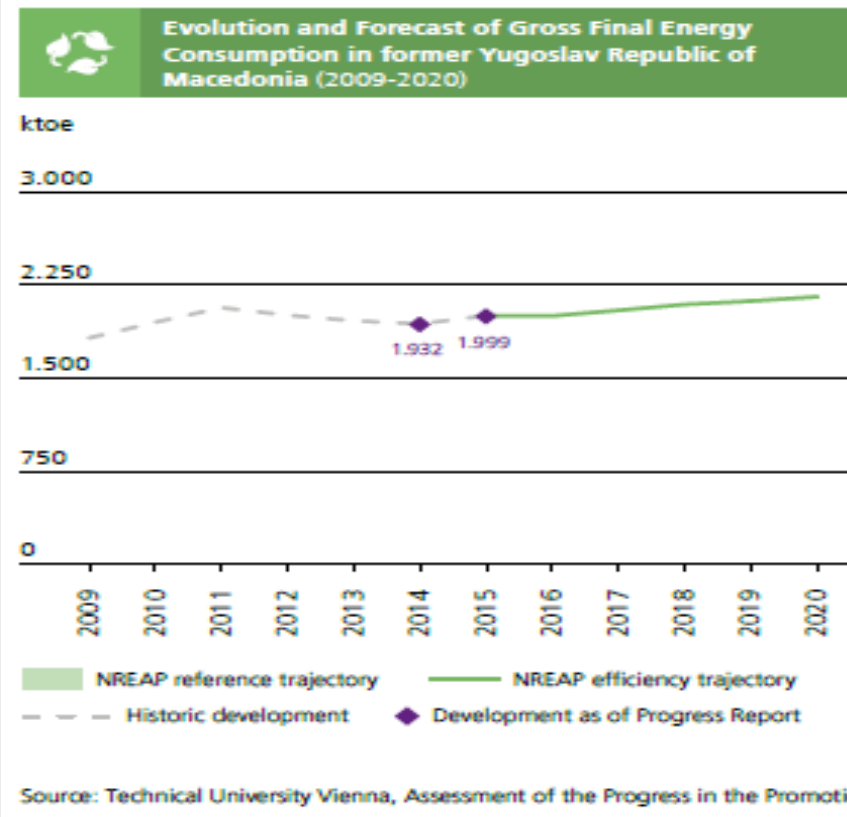
Source: Technical University Vienna, Assessment of the Progress in the Promotion and Use of Renewable Energy in the Energy Community, July 2017

# Kosovo\* – Forecast of 2020 target achievement

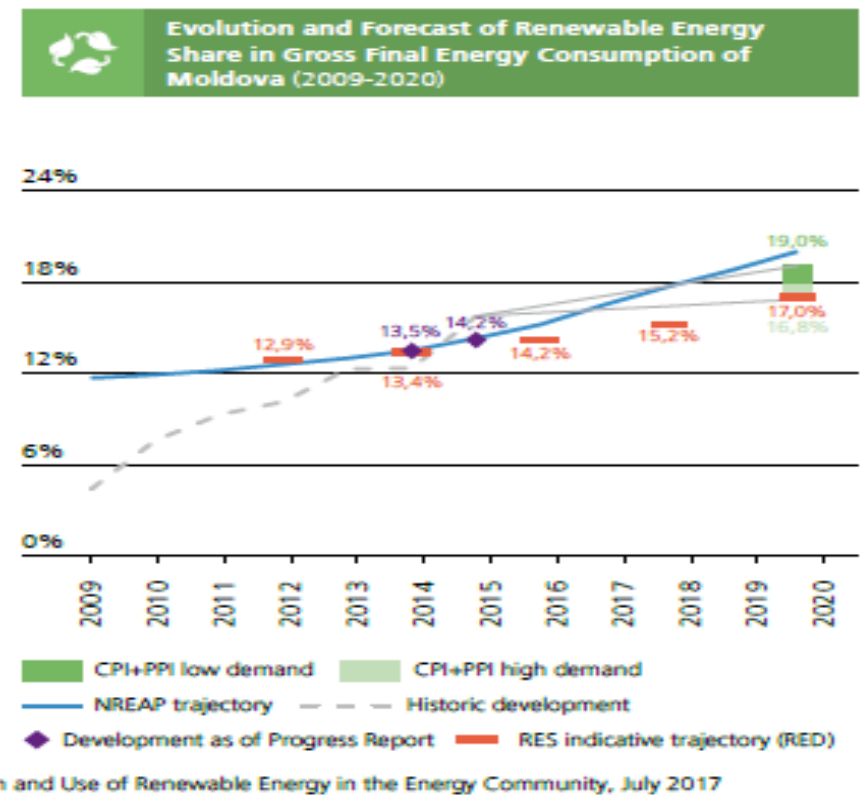
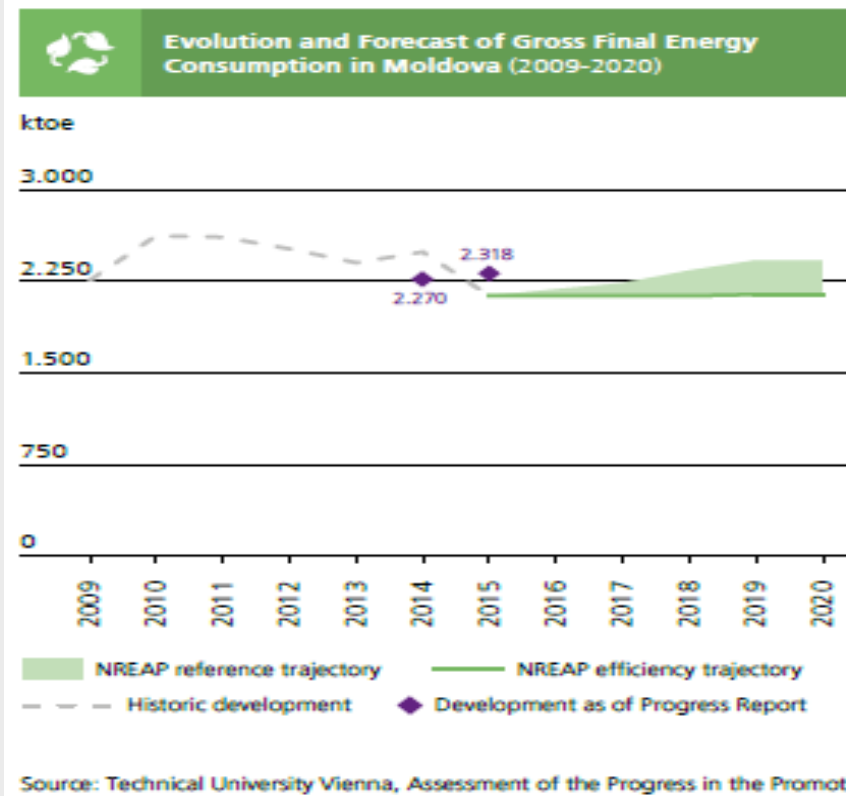


Source: Technical University Vienna, Assessment of the Progress in the Promotion and Use of Renewable Energy in the Energy Community, July 2017

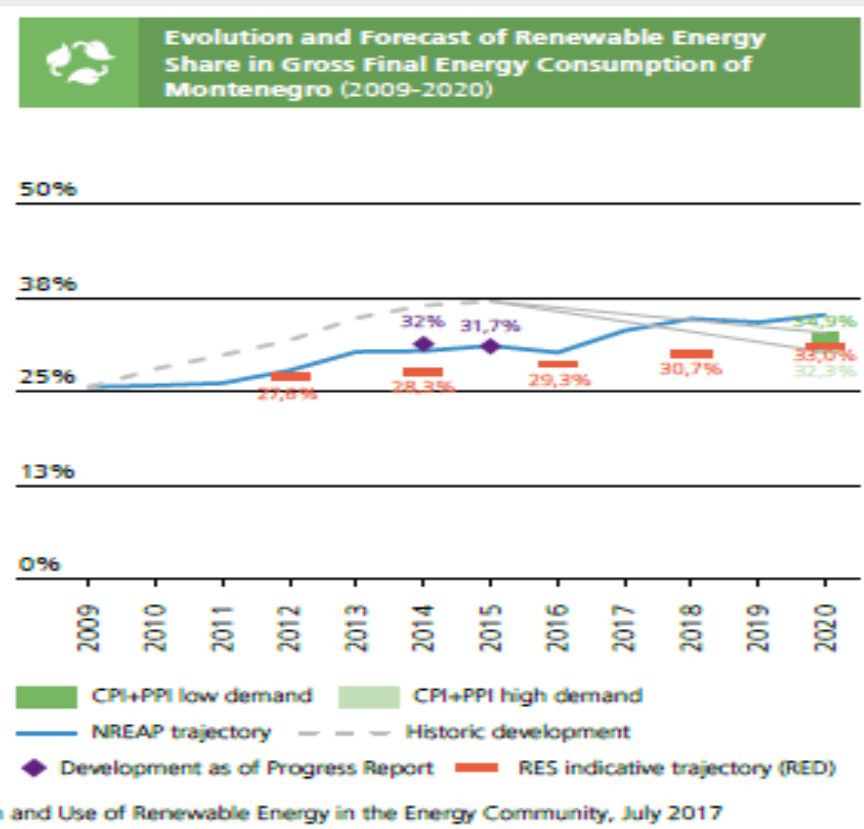
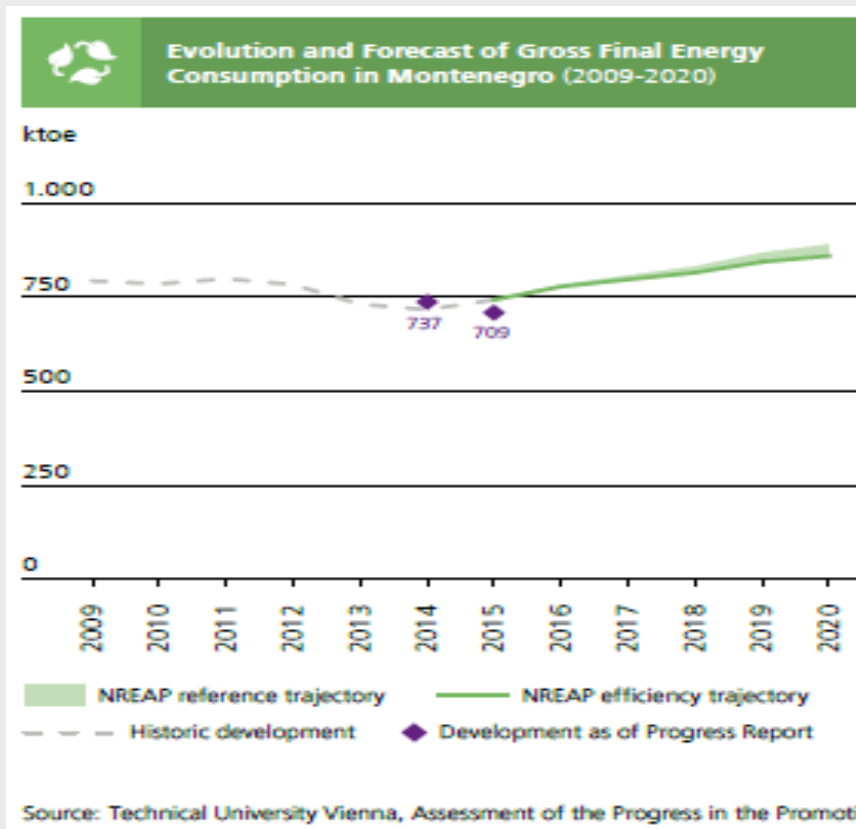
# FYR of Macedonia – Forecast of 2020 target achievement



# Moldova – Forecast of 2020 target achievement

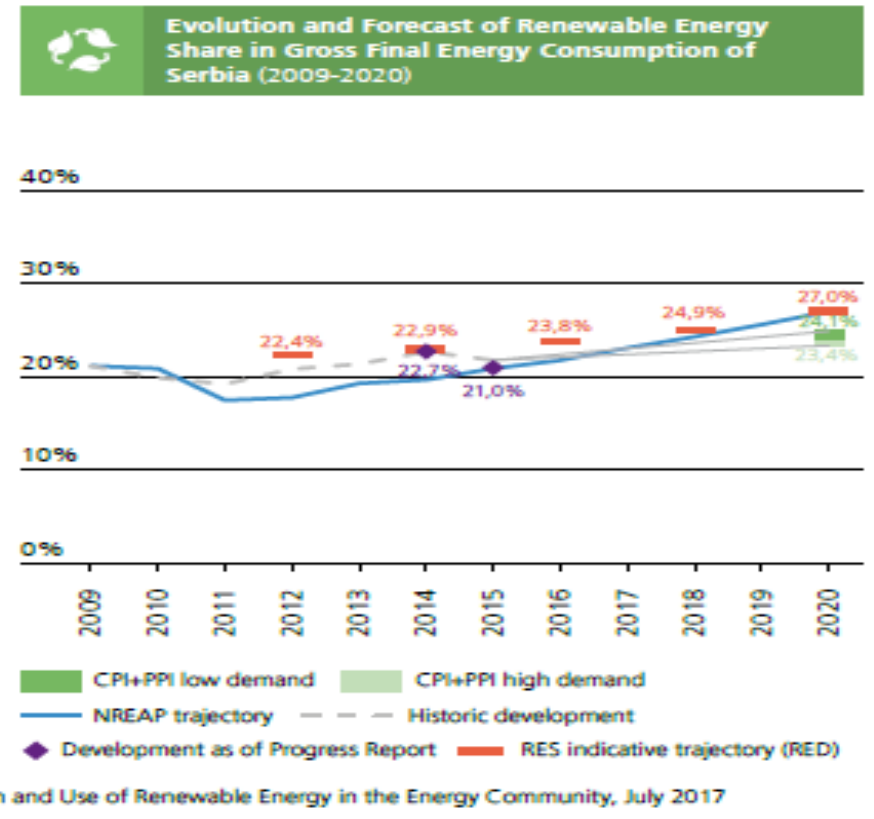
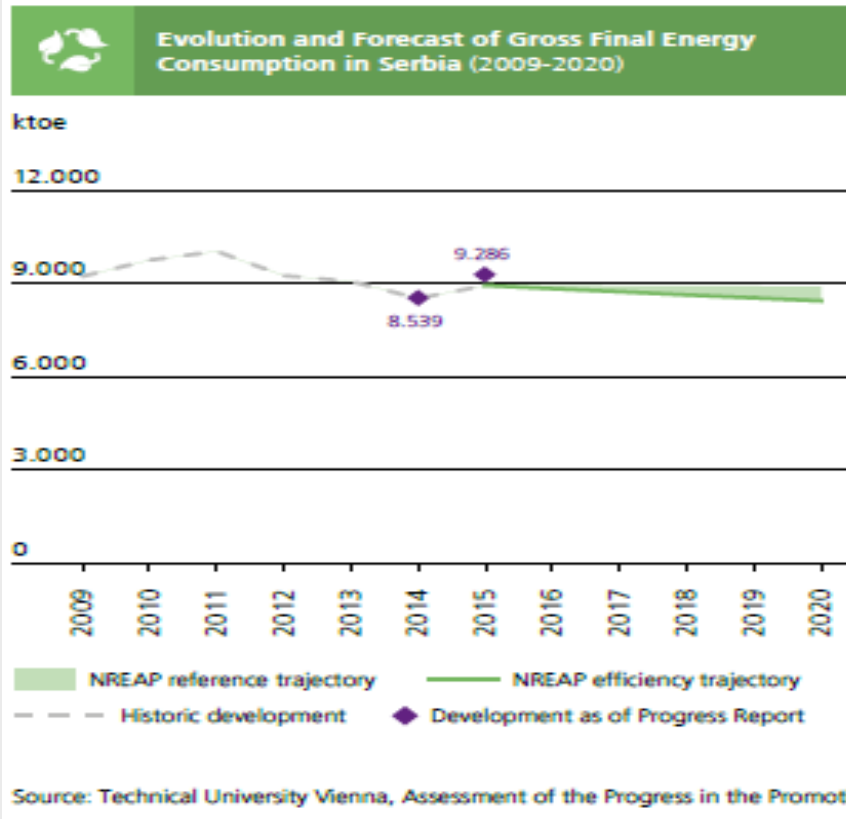


# Montenegro – Forecast of 2020 target achievement

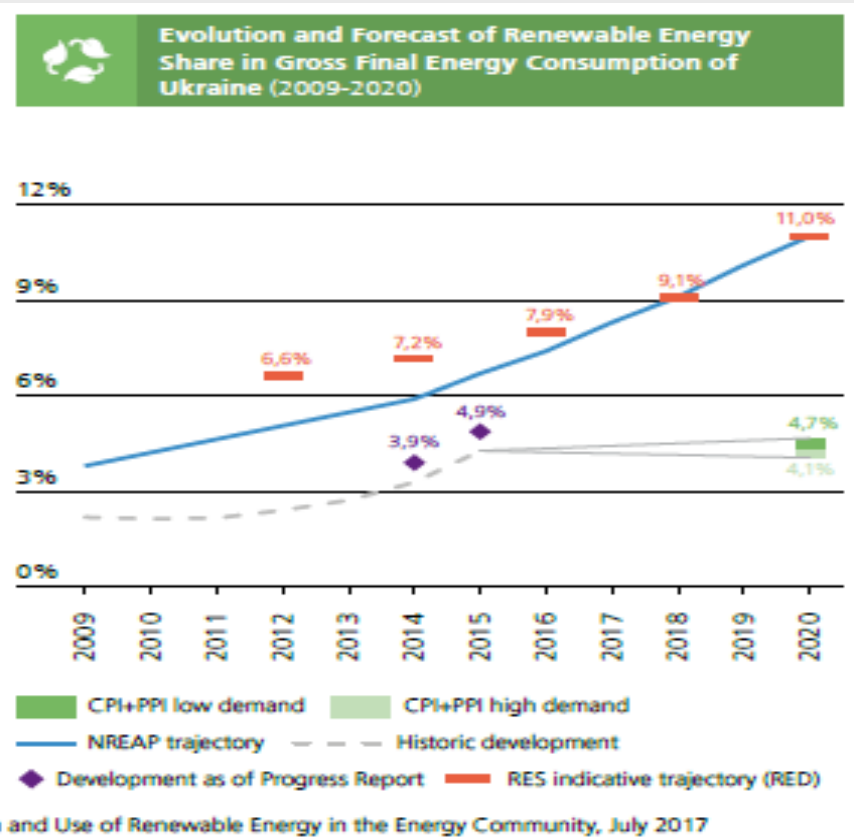
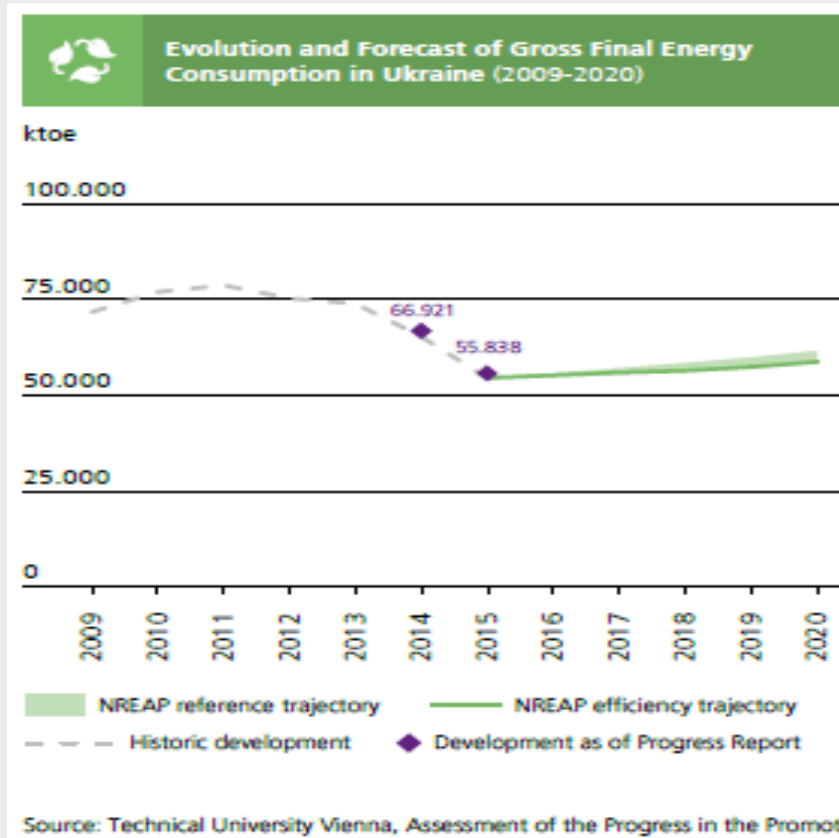


Source: Technical University Vienna, Assessment of the Progress in the Promotion and Use of Renewable Energy in the Energy Community, July 2017

# Serbia – Forecast of 2020 target achievement



# Ukraine – Forecast of 2020 target achievement





*Thank you!*

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