Energy Community developments

Oil Forum 2018
### Word Oil Consumption and Demand

#### Top Ten Countries

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

**Consumption 2017**

**Demand 2014 - 2017**
Oil Consumption in Europe

![Bar chart showing oil consumption in Europe from 2004 to 2017. The chart displays the consumption in thousand barrels daily, with peaks in 2006 and 2007, and a decline in 2008. The consumption remained relatively stable from 2009 to 2011, with slight fluctuations. There was a notable decrease in 2012, followed by a slight increase in 2013 and a steady pattern from 2014 to 2017.](chart.png)
Oil Consumption in the Energy Community

The chart above illustrates the oil consumption figures for various countries within the Energy Community for the years 2016 and 2017. The y-axis represents the oil consumption in units, ranging from 0 to 25,000. The x-axis lists the countries: AL, BA, GE, KS*, MK, MD, ME, RS, UA, and CPS. The bars for each country show the oil consumption for 2016 (blue) and 2017 (orange).
RES share per sector in EU

STATE OF PLAY - PROGRESS BY SECTORS

RES share per sector in EU28

Source: EUROSTAT Shares 2016
EU is adopting Governance Regulation;

Energy Community Ministerial Council in January 2018 adopted Recommendation to adopt

INTEGRATED ENERGY AND CLIMATE PLANS
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)

**2018**
- Set-up Technical Working Groups on NECPs
- Launch work on analytical and technical aspects

**2019**
- Finalize reference and policy scenarios
- Adaptation of EU legislation and endorsement of 2030 targets

**2020**
- Consultation review and assessment of draft national plans
- Submission of final NECPs
RES Target Progress 1

Energy Community Secretariat

* 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

- Albania: 49.6%
- Bosnia and Herzegovina: 48.1%
- Georgia: 46.1%
- Kosovo*: 33.7%
- FYR of Macedonia: 38.0%
- Moldova: 24.4%
- Montenegro: 48.0%
- Serbia: 35.6%
- Ukraine: 16.6%
- European Union 28: 27.4%
- European Union 28 and Energy Community: 32.0%
- Energy Community: 23.1%

Legend:
- 2020 Start
- Flat Rate
- GDP
- Potential
- Interconnectors
- Total

RE share in GFEC in 2030
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

- 32.5% (reduction of energy demand compared to baseline trend)

Primary energy consumption in Mtoe

PRIMES Baseline 2007
PRIMES EUCO30
2020 and 2030 EE-targets
Historic data (EUROSTAT)
EnC 2020 and 2030 EE TARGETS

- Primary energy consumption according to Baseline III
- Final energy consumption according to Baseline III
- Primary energy consumption to comply with -32.5% EE target
- Final energy consumption to comply with -32.5% EE target

PEC and FEC in ktoe
PROPOSED METHODOLOGY: GHG

GDP based non-ETS target differentiation among CPs
3rd Package implementation

- 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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