Partner Countries’ State of Play - Results of Benchmarking Report

Area of cooperation 2: Energy security

INOGATE Working Group Meeting
Brussels, 18-19 May 2011
State of play

**Process**

Step 1 – Country profiles by ITS – Desk research
Step 2 – Validation with CCs and WGMs – Visitation programme
Step 3 – Allocation of progress categories based on the findings on ‘indicators’

**Categories**

- Basic
- Developing
- Mature
Indicators

- Maintenance
- Rehabilitation/Upgrading
- New energy infrastructures
- Metering and billing

- Indicators agreed at the Meeting 20 October 2010 in Tbilisi
- Mostly derive directly from the Energy Road Map
- Few indicators are defined using EU principles
## Benchmarking criteria (1)

<table>
<thead>
<tr>
<th>Basic</th>
<th>Developing</th>
<th>Mature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies exist on maintenance but no implementation measures taken</td>
<td>Budgets are allocated for maintenance</td>
<td>Maintenance programmes are being implemented up to full needs</td>
</tr>
<tr>
<td>Policies exist on rehabilitation and upgrading but no implementation measures taken</td>
<td>Budgets are allocated for rehabilitation and upgrading</td>
<td>Rehabilitation/Upgrading programmes are being implemented up to full needs</td>
</tr>
</tbody>
</table>
## Benchmarking criteria (2)

<table>
<thead>
<tr>
<th>Basic</th>
<th>Developing</th>
<th>Mature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies exist for new infrastructure but no implementation measures taken</td>
<td>Some investment measures are taken but still serious limitations hindering investment</td>
<td>Infrastructure needs fully fulfilled without limitations</td>
</tr>
<tr>
<td>Policy to introduce metering for industry and households but no implementation measures taken</td>
<td>Some metering introduced in industry and households</td>
<td>Metering is done in all industry and households</td>
</tr>
</tbody>
</table>
Results

Maintenance
1. All partner countries interested in maintenance
2. Development of this sector in some countries is small due to:
   - Lack of investment
   - Limited knowledge or Know-how

Rehabilitation/Upgrading
1. All partner countries are interested in rehabilitating and modernising infrastructures
2. Rehabilitation is still underdeveloped; main reason: lack of sufficient funds
3. All partner countries are taking care to limit energy losses
4. In many countries losses still high
Results

New energy infrastructures
1. All PCs are seeking investment
2. In some countries underdeveloped due to the lack of investment
3. Energy producing and transit countries are interested in erecting new transit lines (electricity & gas)

Metering and billing
1. Almost all countries take measures (electricity)
2. In some countries no gas metering at the end users
3. Underdeveloped tariff collection: In some countries energy tariffs are used as social measures.
### Results of state of play

#### Pillar #2 Energy security

<table>
<thead>
<tr>
<th>Country</th>
<th>Maintenance</th>
<th>Rehabilitation</th>
<th>New infrastructure</th>
<th>Metering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Armenia</td>
<td>Developing</td>
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</tr>
<tr>
<td>Azerbaijan</td>
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<td>Developing</td>
<td>Developing</td>
<td>Basic</td>
</tr>
<tr>
<td>Belarus</td>
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<td>Georgia</td>
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<td>Kazakhstan</td>
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<td>Kyrgyzstan</td>
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<td>Moldova</td>
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<td>Tajikistan</td>
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<tr>
<td>Turkmenistan</td>
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<td>Ukraine</td>
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<tr>
<td>Uzbekistan</td>
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</tr>
</tbody>
</table>

This table is based on the analysis of the INOGATE Technical Secretariat and does not necessarily reflect the view of the European Commission.
Best practices/examples

Maintenance
1. Best cases: Belarus, Georgia, Ukraine

Rehabilitation/Upgrading
1. Most developed: Turkmenistan and Ukraine
2. Prepared projects awaiting investment: Armenia, Kyrgyzstan, Moldova

New energy infrastructures
1. Most developed: Turkmenistan and Ukraine
2. Prepared projects awaiting investment: Armenia, Kyrgyzstan, Moldova

Metering and billing
1. Most developed: Armenia, Belarus, Georgia, Moldova, Ukraine