

Tracking Progress in Sustainable Energy GTF : Arab Regional Report

TRACK IV: Regional Cooperation

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8th International Forum On Energy
for Sustainable Development

Economic And Social Commission For Western Asia



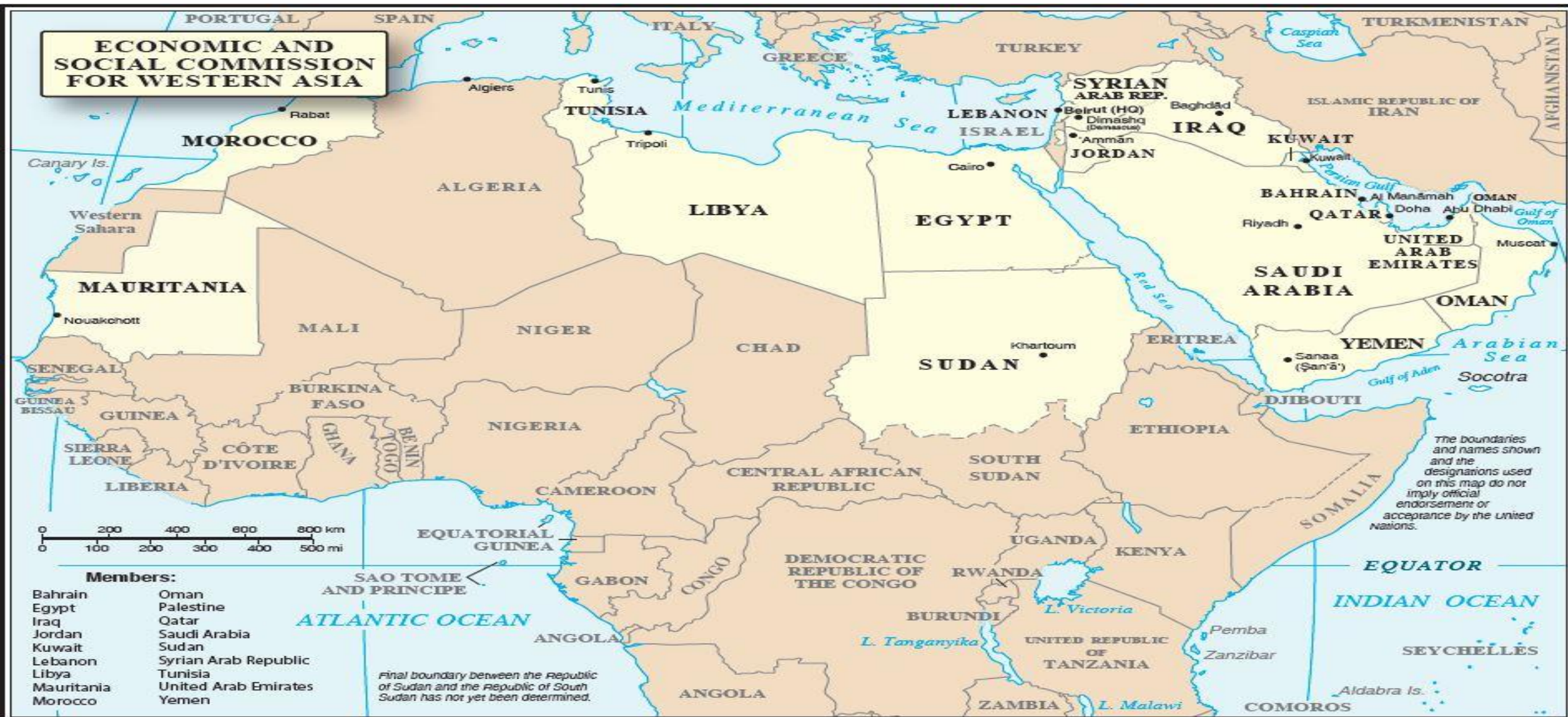
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ESCWA Region overview : 18 Member Countries - Population approx. 380 million



The question: How inclusive is progress in sustainable energy development in the Arab region?

Known, and largely untackled vulnerabilities for the Arab Region

1

Universal access to modern energy



2

Energy efficiency



3

Renewable energy

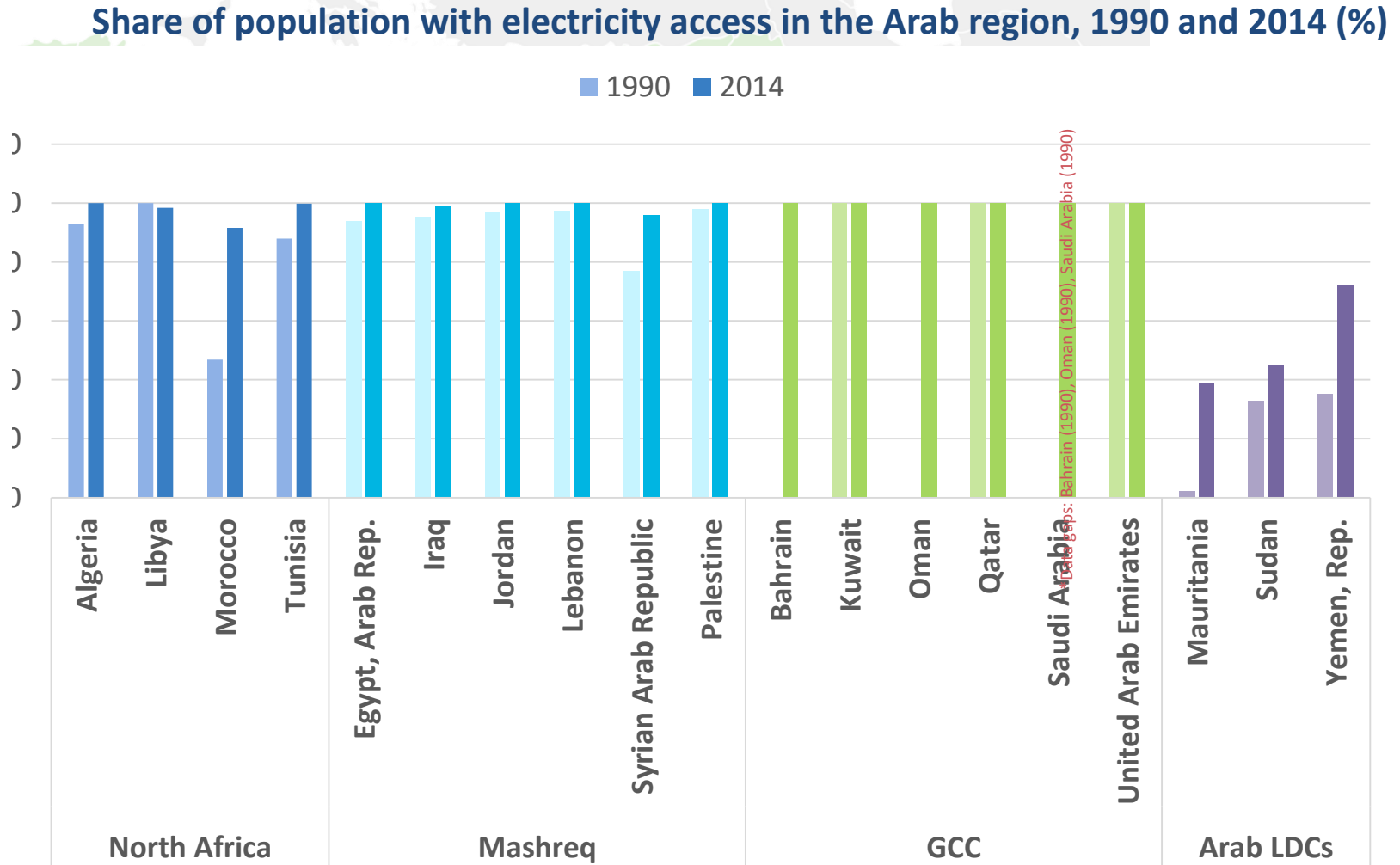


- Inter-linked water and food security concerns, likely to be intensified by lacking energy and wider natural resource management
- Growing energy demand – to continue over coming decade
- Rising urbanisation
- Costs of imports and deadweight losses to the economy
- Climate change vulnerabilities: drought, extreme weather, flooding
- Inclusive national development
- Conflict potential of unequal access to energy and natural resources

Universal access to modern energy

Significant progress in modern energy access, with important remaining sub-regional gaps in the Arab LDCs

- Electricity access has been historically high in the Arab region as far back as the 1990s
- Rapid progress has been made in universalizing electricity access in North Africa and the Mashreq, although small rural-urban divides remain
- Arab LDCs remain the only sub-region in the Arab world with significant access deficits, in particular in non-urban areas
- Unexpected service disruptions due to insufficient capacity & network quality

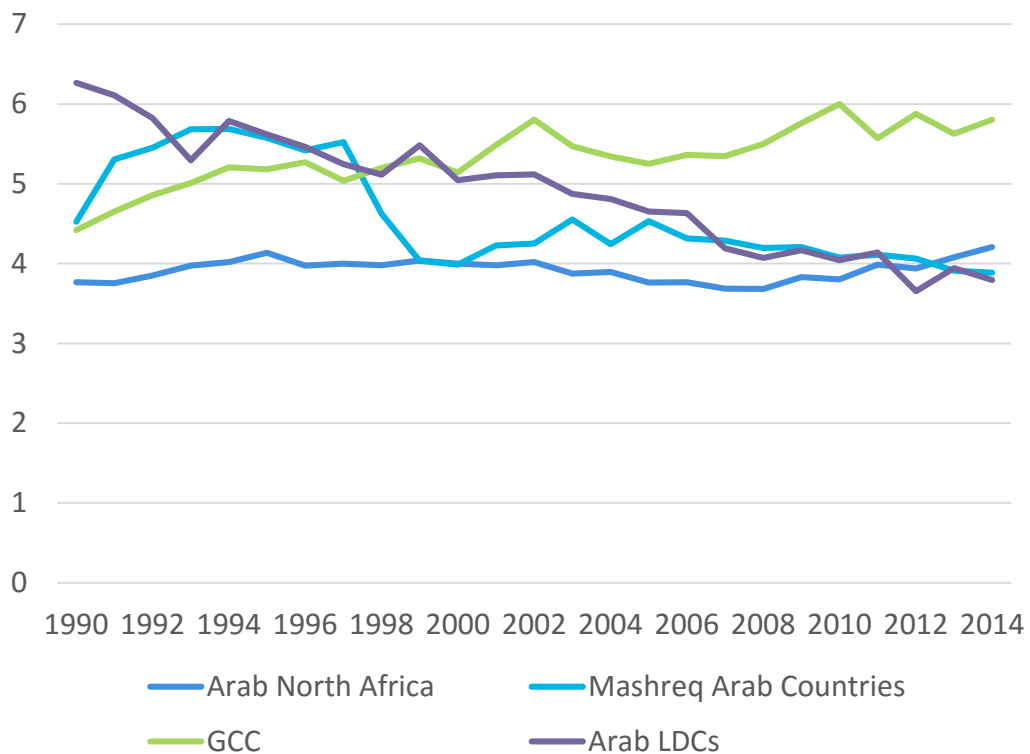


Energy efficiency

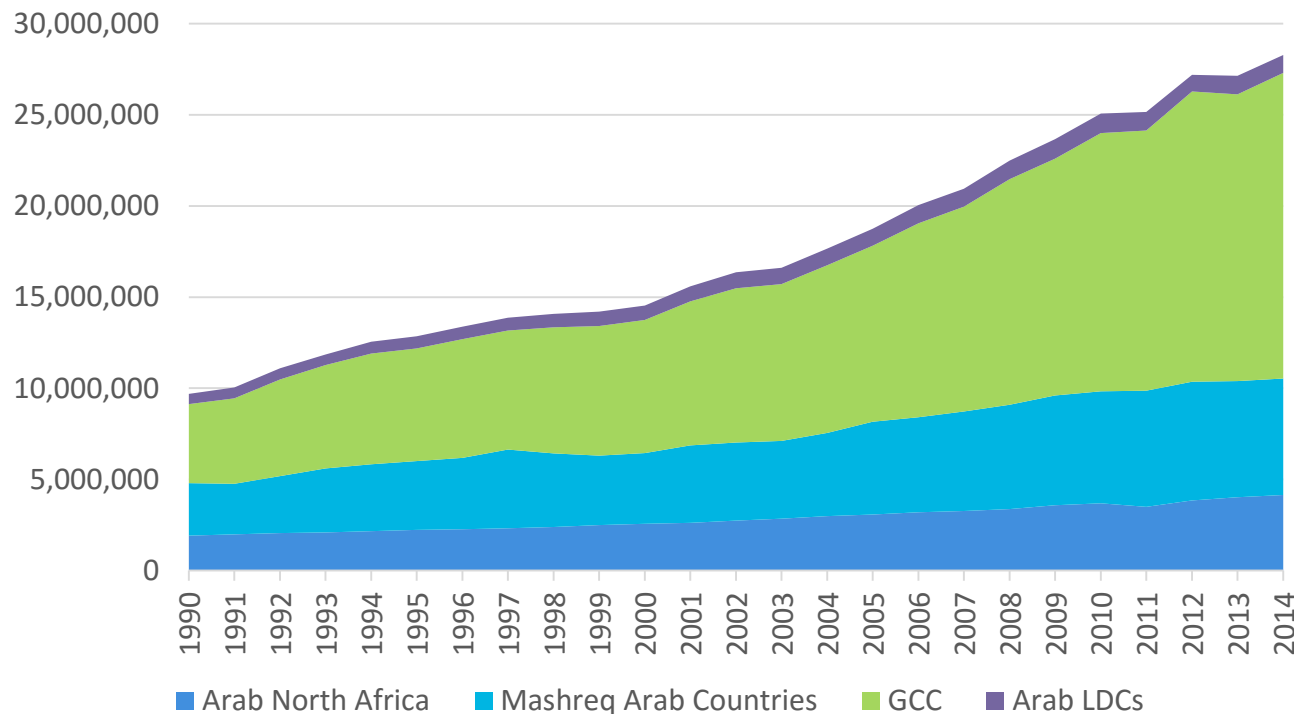
The Arab region is the only world region where energy intensity has been increasing, not declining since 1990

Progress in energy efficiency needs to accelerate much more

Energy Intensity in the Arab region by sub-region, 1990 – 2014
(MJ / GDP PPP 2011 \$)



Final energy consumption in the Arab region by sub-region, 1990-2014



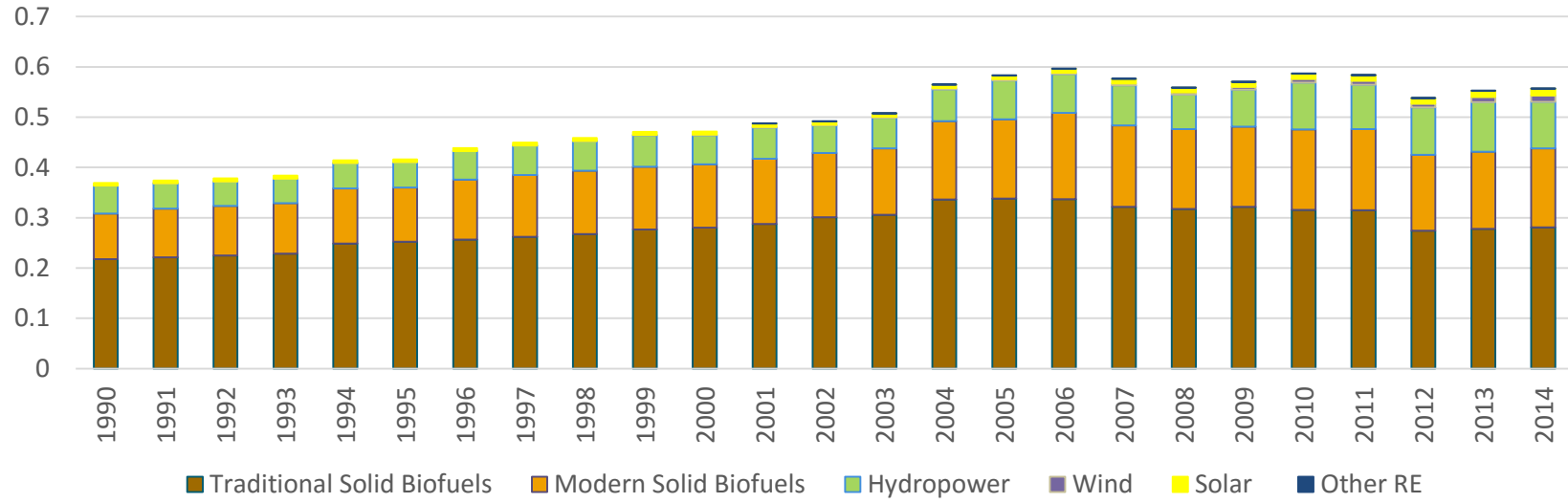
Much of the region's aggregate growth in energy intensity since 1990 comes from the GCC

Renewable energy

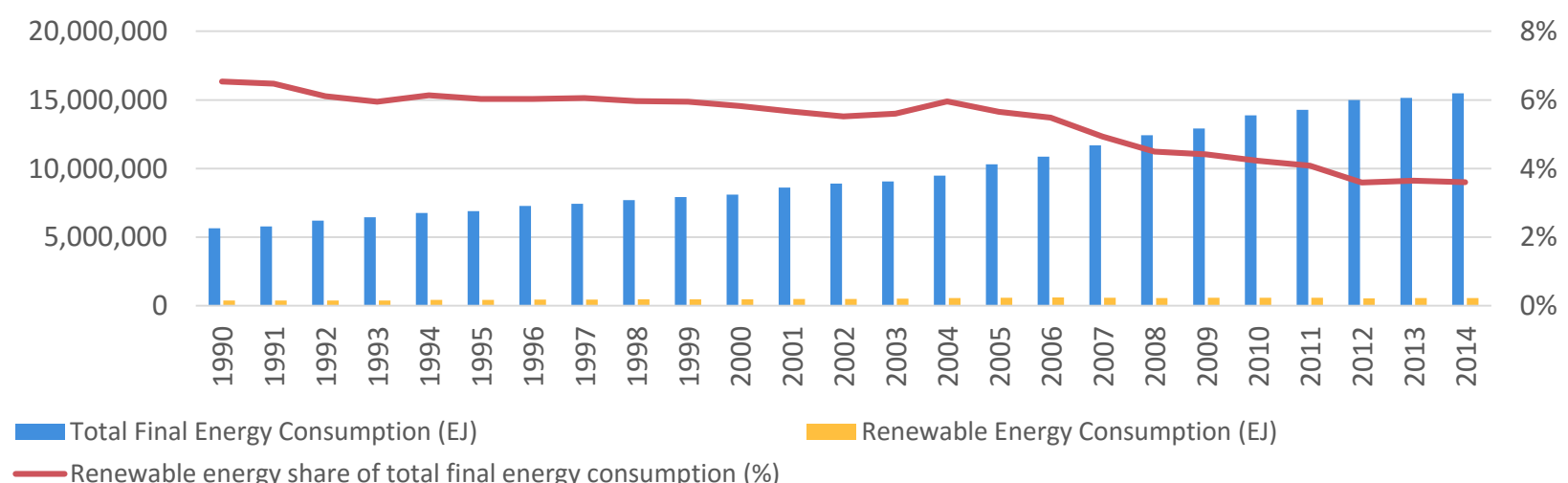
RE in the Arab region remains a rather untapped resource despite significant potential (solar, wind, bioenergy)

- Biomass dominates the Arab region's RE consumption
- In many cases, biomass is an inferior choice – particularly traditional solid biofuel (fuelwood, crop residues, animal dung)
- As people climb up the energy ladder, they moved from biomass to liquid fuels and electricity
- As modern RE projects – wind, solar – have only been slowly forthcoming, net-RE consumption in the Arab region has gone down along with increasing access rates to modern energy

RE consumption by source in the Arab region, 1990-2014 (EJ)



The share of RE in aggregate Arab energy consumption has actually been declining over the years



Policy Challenges in Sustainable Energy Development in the Arab Region

Non-existent market incentives

- State-centred energy supply model
- Long-established practice of underpricing energy

Political will versus popular expectations

- Sustainable energy policy takes time to show benefits to the larger economy, but people want tangible benefits now

Information deficits

- Industrial users, final consumers and sometimes governments equally lack access to data and information

Weak civil societies

- Support from civil society organizations for sustainable energy policies is almost non-existent

Political and social conservatism on energy matters

- “We have always done it like this”; Path-dependency and the value of “doing nothing” versus the risk of doing something

Conflict and long-term planning

- Conflict and political instability necessitate priorities to be set on short-term horizons in policymaking

Policymakers are key to accelerating progress in sustainable energy over the coming years.

THANK YOU

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