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On behalf of:



Federal Ministry for the  
Environment, Nature Conservation,  
Building and Nuclear Safety

of the Federal Republic of Germany

# Fostering renewable energy expansion in UNECE Region.

Main trends and project presentation.

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Oliver Frank, Head of Division Renewable Energy and Energy-Efficient Mobility

Deutsche Energie-Agentur GmbH (dena) - German Energy Agency

This project is part of the International Climate Initiative (IKI). The German 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.



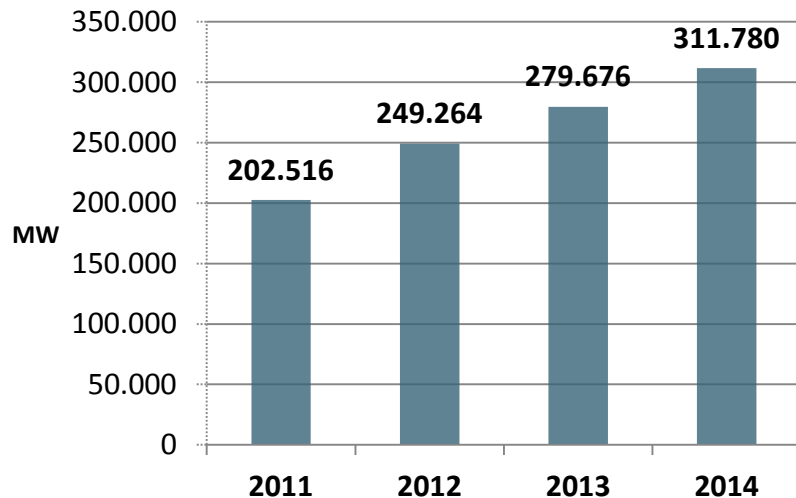
## Agenda.

- Where we stand today.
  - Present status in UNECE countries: Different levels of renewable energy expansion.
  - Important key drivers and their impact on international market development.
- Outlook.
  - Significance for further integration of renewable energies in UNECE region.
- Project presentation.
  - Short term consultancy for UNECE.

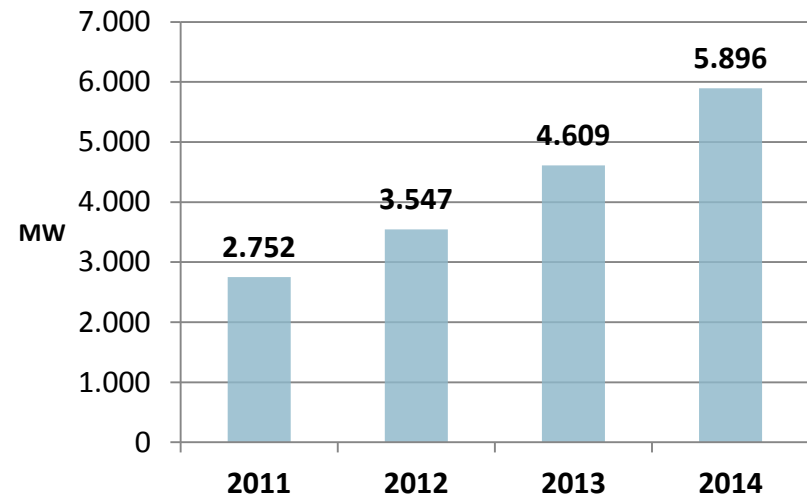


# UNECE region: Recent PV- and wind energy development.

**West EU & USA/ Canada/ Norway/ Switzerland  
(Wind and PV capacities cumulated)**



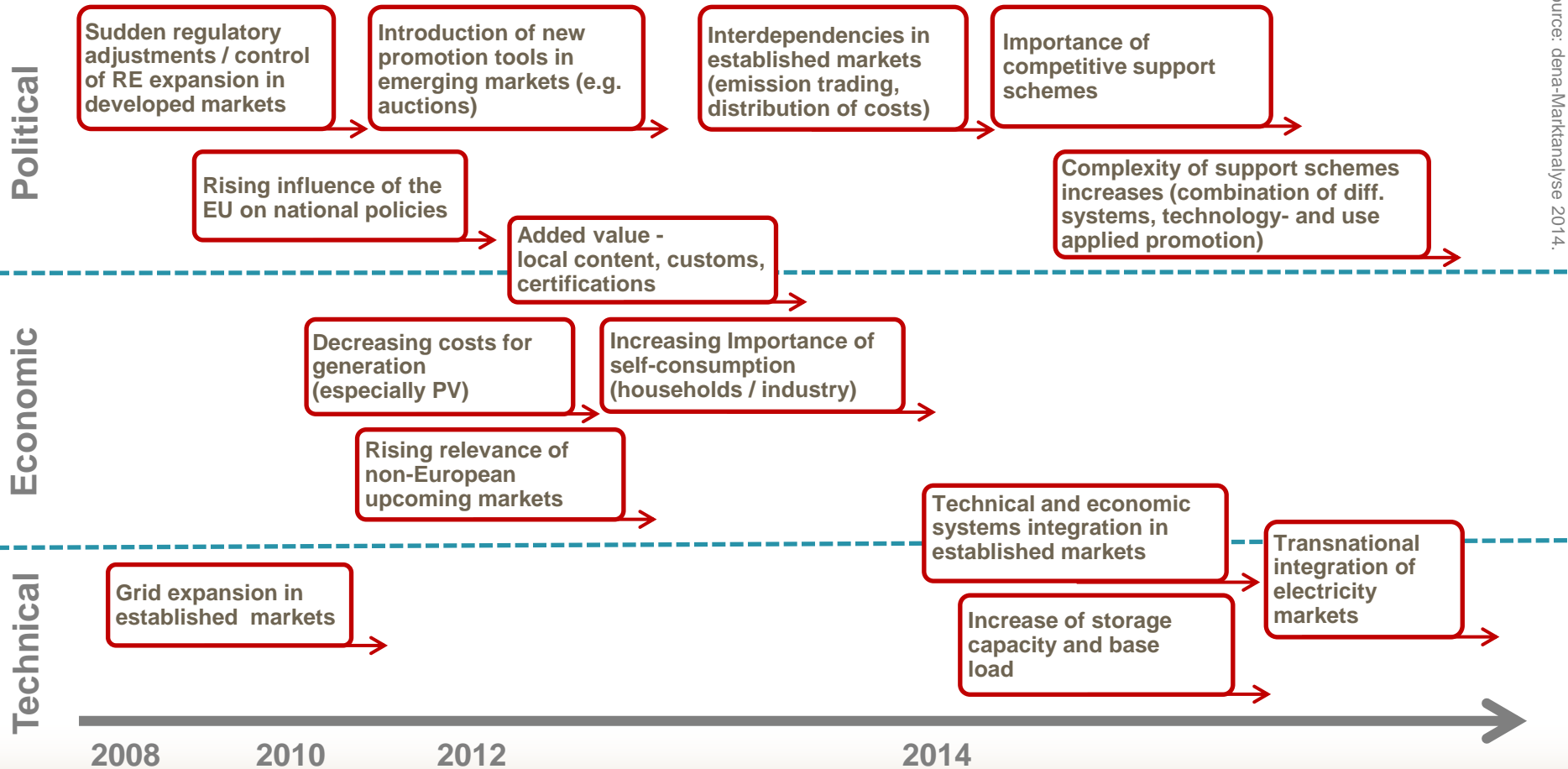
**East EU & Central Asia\*  
(Wind and PV capacities cumulated)**



\*Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Georgia, Israel, Kazakhstan, Kyrgyzstan, FYR Macedonia, Republic of Moldova, Montenegro, Russian Federation, Serbia, Slovakia, Tajikistan, Turkey, Turkmenistan, Ukraine, Uzbekistan



# Emergence of important key drivers in the past years.



Source: dena-Marktanalyse 2014.



## Trends.



- Increasing control and partial limitation of renewable energy expansion.
- Competitive promotion schemes introduced in non-European markets gain importance also in European countries.
- Combination of technology- and applied promotion lead to a higher complexity for market actors as well as for policy makers.
- In established markets with a high share of renewable energies: Systems integration and new business models gain importance. Demand and flexibility as relevant topics.
- Countries with high natural potential and relatively high electricity prices: Regulation for general market access as well as for self-consumption (households and industry) are getting more important.



## Significance for further market development in the UNECE region.

- Situation of renewable energy development vary considerably between member countries (especially with new renewable energies).
- Member states are facing a diverse set of significant challenges for the expansion of renewable energies in national markets e.g.:
  - Level of market liberalisation / no market access for IPPs.
  - Low or subsidised energy prices.
  - Missing or inadequate promotion policies: Need to define efficient promotion policies depending on own macro-economic situation and technical potential for each technology and field of application.
  - In markets with high share of renewables: Need to foster technical and economic integration.
  - Expansion of renewable energies in heat markets as an important task for almost every country (subject to climate conditions).



## Short-term consultancy.

- **Aim:**
  - Increase the uptake of renewable energy by exchanging relevant information and best practices.
  - Using examples of particular cases, a catalogue of different funding and implementation instruments will be developed.
- **Elements:**
  - Five best-practice country case studies to show different approaches to promote renewable energies (e.g. Germany, Turkey, USA, France, Kazakhstan, The Netherlands, United Kingdom).
  - Summary of policy-options to develop framework conditions for renewable energies.
  - “Lessons learned“: Presentation of successful drivers for renewable energy uptake.
  - Proposals: Mechanisms to exchange best practices, such as task force creation and follow-up activities (also GERE workplan 2016-17).



# Thank you for your attention!

## **Oliver Frank**

Head of Division Renewable Energy and Energy-Efficient Mobility

Deutsche Energie-Agentur GmbH (dena) - German Energy Agency  
Chausseestraße 128 a, 10115 Berlin, Germany

Tel: +49(0)30 72 61 65-680

Fax: +49(0)30 72 61 65-699

E-Mail: [o.frank@dena.de](mailto:o.frank@dena.de)

Internet: [www.dena.de](http://www.dena.de)