



# Regional Review

Will upcoming  
bid rounds lead  
recovery?



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CEEC Executive Committee

# Energy Consumption, Demand and Renewables

A few thoughts



**In 2012, nearly 25 percent of the population of 105 developing countries had no electricity**

LATIN  
AMERICA  
**5%**


AFRICA  
**57%**

MIDDLE  
EAST  
**8%**

ASIA  
**17%**

Percentage of population  
without electricity

# 930 Million People Live In the DARK



**One third of the world's population  
2.5 billion people  
use firewood to cook. Another 120  
millions use kerosene and  
170 millions use charcoal**

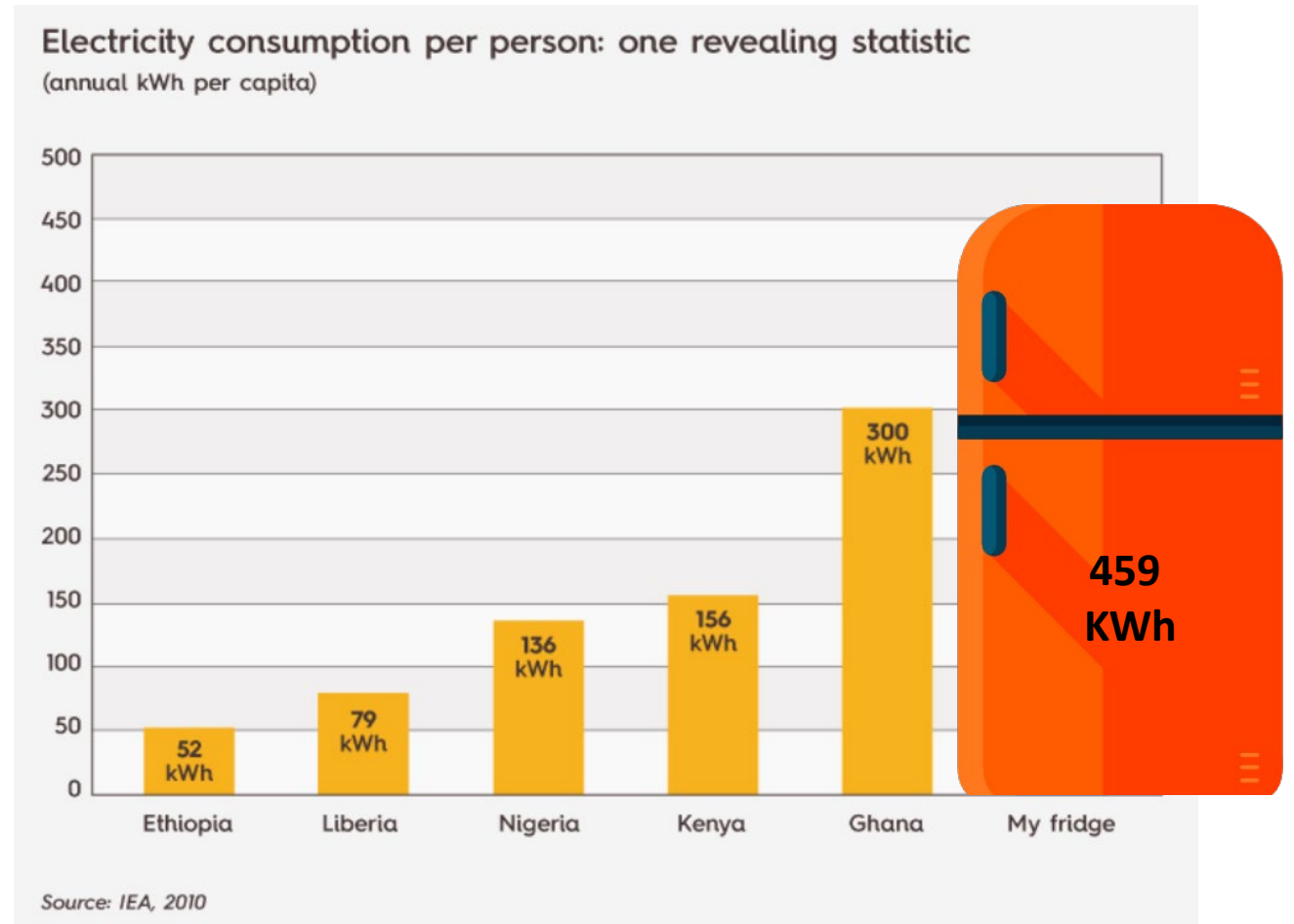


# My fridge uses 9X the energy as an average Ethiopian

3 Billion people subsist on the energy equivalent of **2 liters** of gasoline a day

In Europe we consume between **7 and 12 liters** per person per day

In the US, the per capita consumption is **20 liters** per day





# European Energy Poverty

EDEPI scores show the majority of EU countries have 'moderately high' to 'extreme' levels of energy poverty among low-income households

Country	EDEPI Score
1 Sweden	95.4
2 Finland	85.6
3 Denmark	81.9
4 Austria	81.2
5 Luxembourg	80.9
6 United Kingdom	80.5
7 Ireland	79.3
8 Netherlands	78.1
9 Germany	75.8
10 France	73.3
11 Belgium	67.6
12 Spain	64.7
13 Romania	64.2
14 Poland	61.0
15 Czech Republic	60.2
16 Croatia	58.8
17 Malta	58.6
18 Estonia	58.0
19 Italy	52.1
20 Slovenia	51.3
21 Cyprus	46.2
22 Greece	43.7
23 Lithuania	42.4
24 Latvia	40.0
25 Portugal	36.7
26 Slovakia	8.4
27 Hungary	6.2
28 Bulgaria	0.7

Level of energy poverty:

Low Moderate Moderately high High Very high Extreme

EDEPI scores show a divide reflecting GDP per capita levels in the EU.

Source: OpenExp, 2019.

In some countries, up to 22% of households were returning to heating systems based on firewood (20.4%) or coal (1.6%).

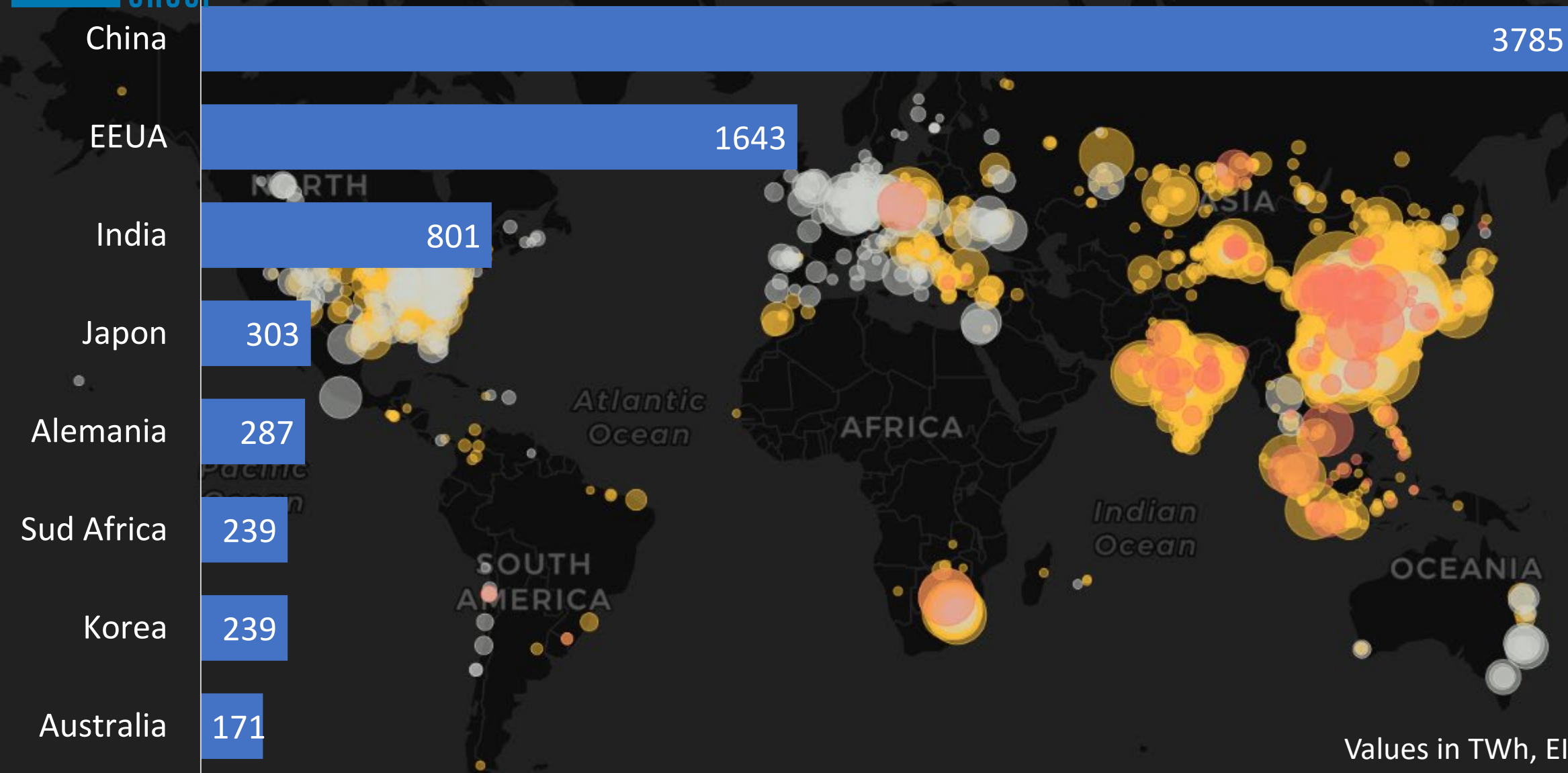
400 000 households, primarily in rural areas, are not yet connected to the electricity grid in one country

Energy Action Project, 2019



CEEC SCOUT GROUP

# Coal is still covering the world in soot



Values in TWh, EIA 2012

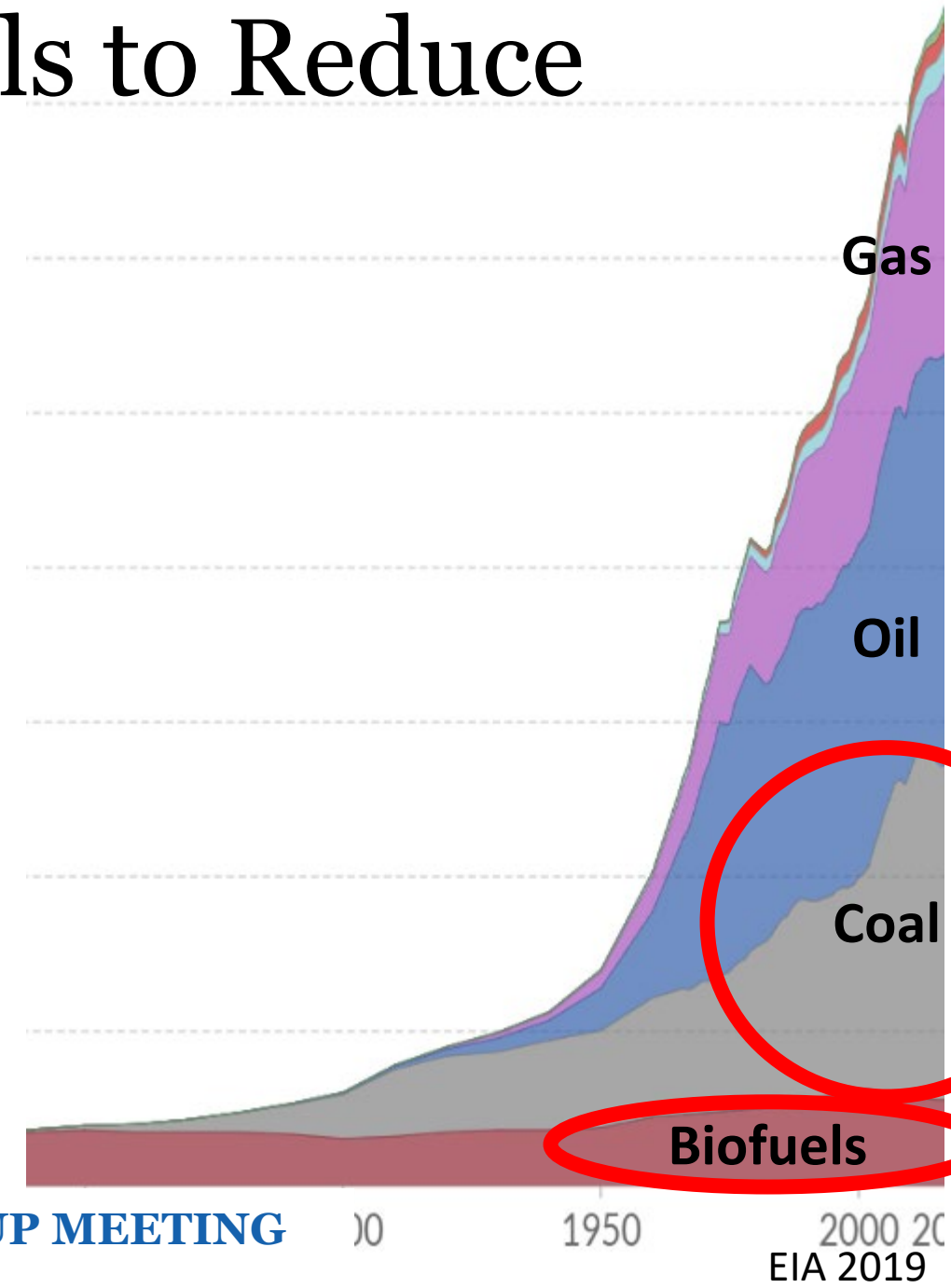


# Eliminating Solid Fuels to Reduce Carbon

Governments and Companies are committing to Carbon Neutrality Goals for 2050

Today the increase in thermal electricity generation capacity world wide using coal and oil is growing 9% faster than renewables

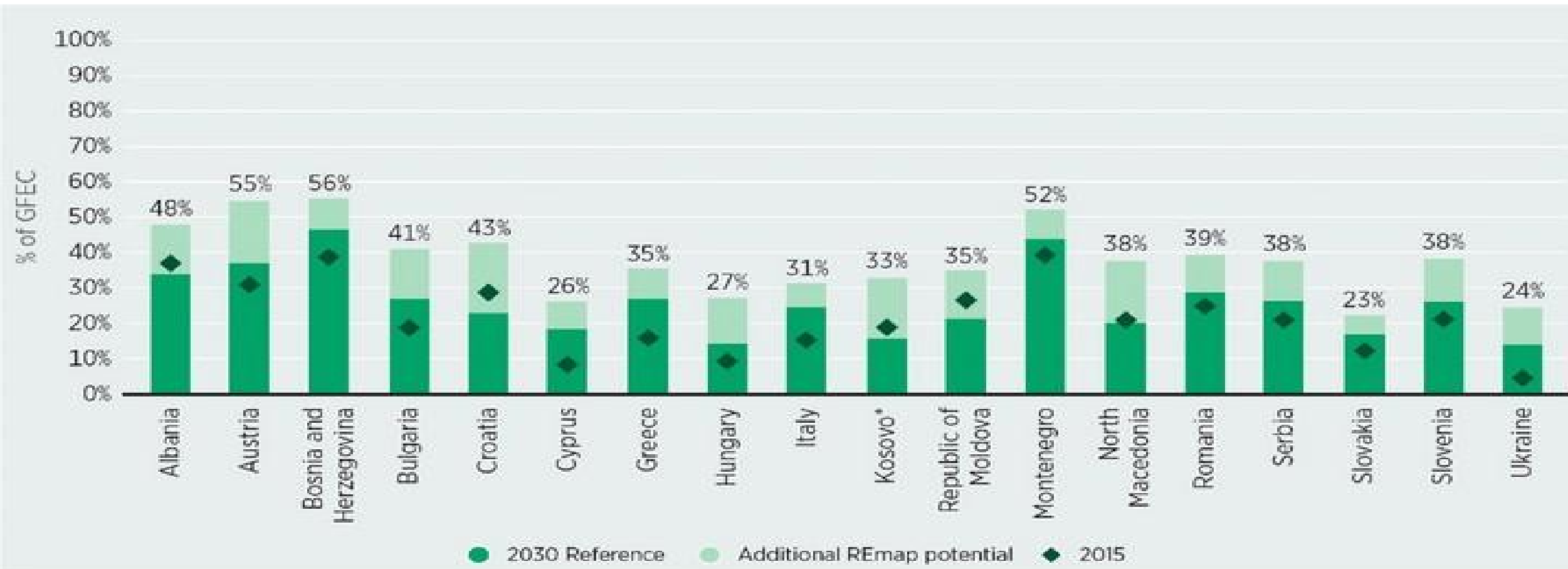
Can we replace 65% of the fuel sources





# Renewables Growth Across CEEC

Share of renewables in gross final energy consumption by CEEC member



# Looking at bid rounds in CEEC in 2021



# CEECSG Bid Rounds – Lot's going on



The Albania government has rewritten the petroleum fiscal regime. Awards from 2019 bid round made soon with better terms

Bosnian Federation had open bid round. Bid date extended

Republica Srpska awarded licenses to NIS

Croatia recently licensed blocks for previous bid rounds

- Upcoming geothermal bid round

Georgia offered offshore blocks in bid round

Greece very busy - recently licensed blocks & upcoming bid round

Hungary ongoing with regular bid rounds

Poland ongoing with regular offers

Romania Bid Round shelved for time being. General opinion is that the bid round will be announced after December elections

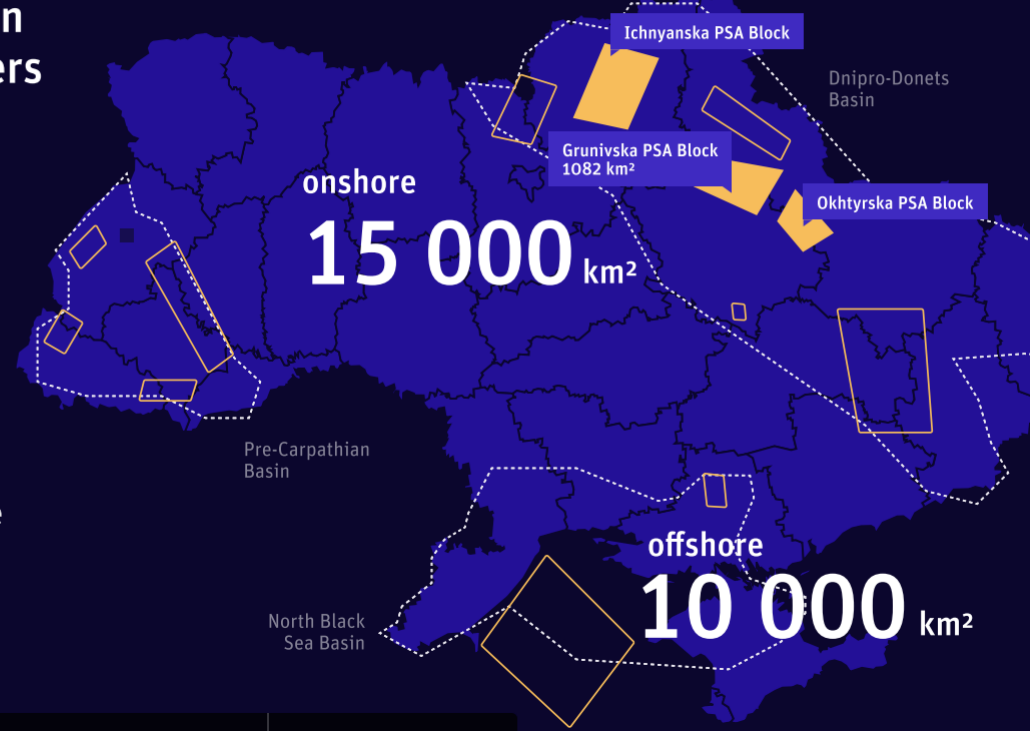
# Ukraine

In 2020, Ukraine is ready to offer more concession auctions and PSA tenders

**3 PSA** blocks will be tendered

**23 concessions** are opened to be nominated for e-auctions

**JV or new risk-service contracts** with national company UGV



Ukraine has an ongoing series of international licensing rounds through online Concession auctions and Production Sharing Agreements tenders. In 2019 Ukraine offered 42 blocks in licensing rounds.





**In 1987 my friends told me**

**To change careers because  
there was no future in the oil  
business**





Thankfully  
there is a lot  
to contribute  
to the future!