



2011 In-depth Energy Policy Review of the Slovak Republic

22-26 November 2010, Bratislava

The Common EU Energy Policy and the Energy Security of Slovakia

5th annual energy conference, November 21st 2011, Bratislava

Roman Portuzak

Team Leader

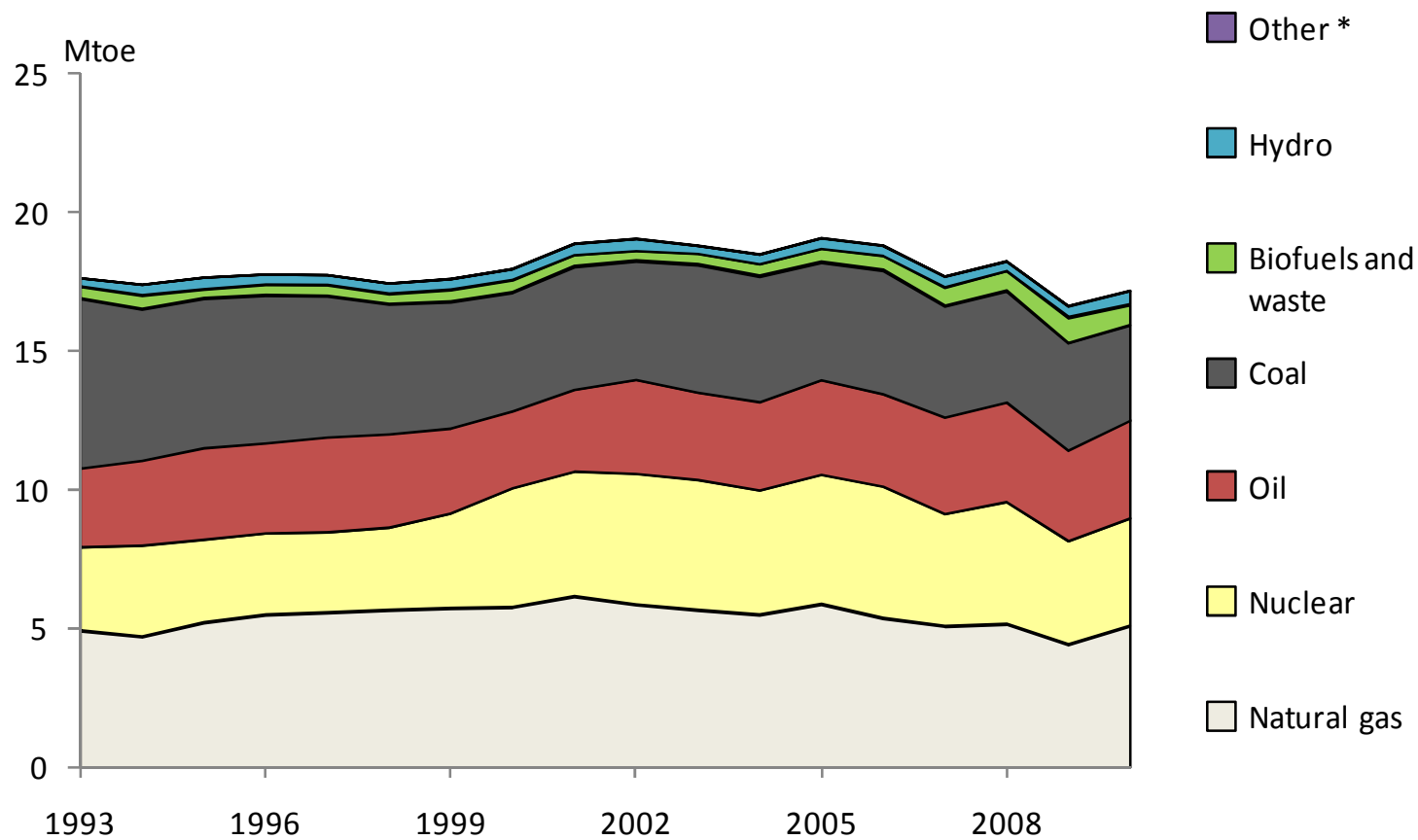
The review team

Roman Portuzak	Czech Republic
Romain Cailleton	France
Horst Schumacher	Germany
Mette Gravdahl Agerup	Norway
Kristina Holmgren	Sweden
Öztürk Selvitop	Turkey
Livia Vasakova	European Commission
Martin Taylor	NEA
Robert Arnot	IEA
Shinji Fujino	IEA
Aurelien Saussay	IEA
Elena Merle-Beral	IEA

Country indicators

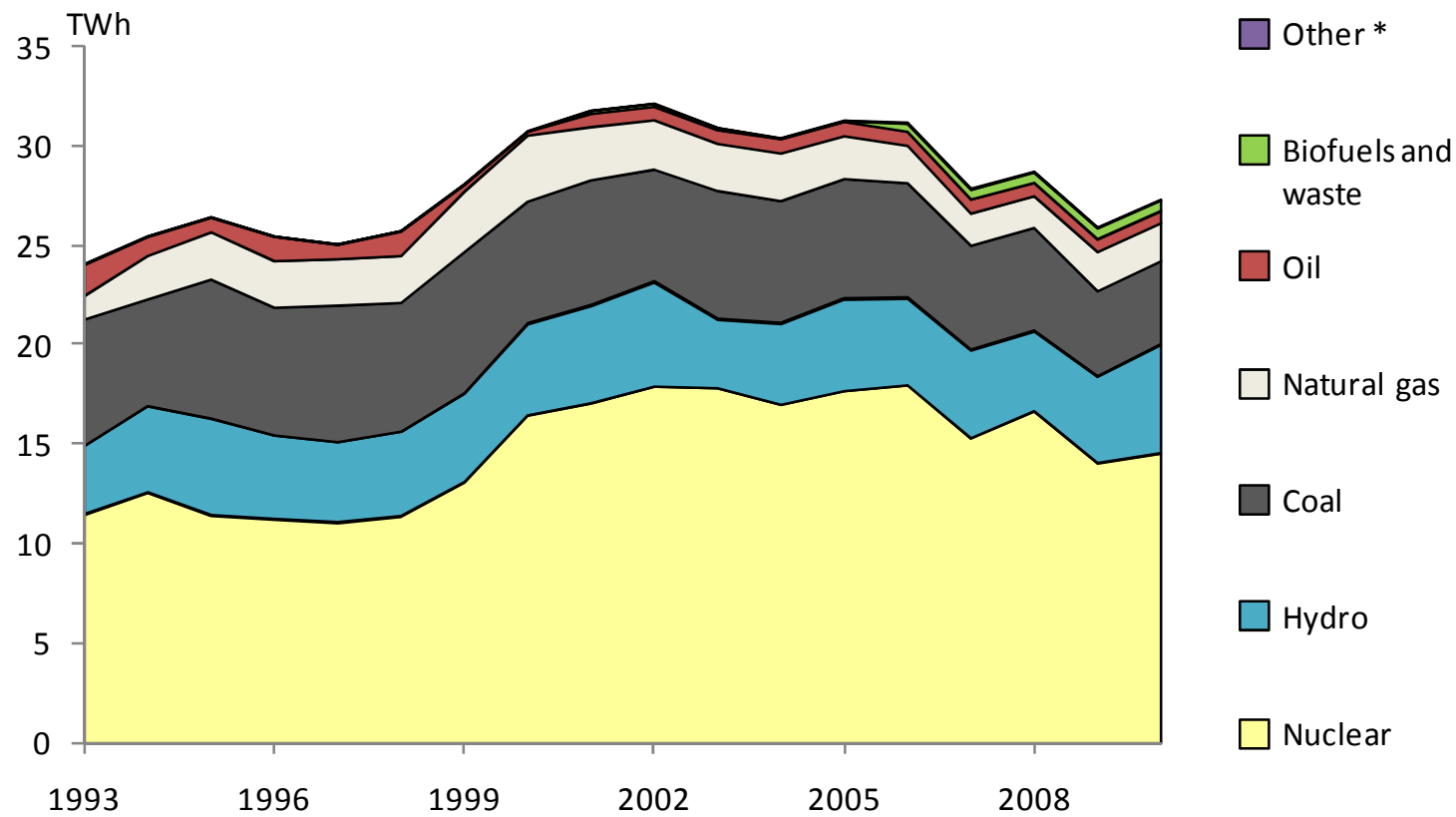
- Energy use per capita – 3.2 toe/year
 - Fifth lowest among IEA members (IEA average 4.7 toe)
- Share of nuclear in electricity generation – 53%
 - second highest among IEA members, after France
- Carbon intensity (kg CO₂ per \$2000 PPP) – 0.36
 - seventh highest among IEA members
- Large share of industry in final consumption – 40% (IEA *average*: 31%)
and low share of transport – 21% (IEA *average*: 32%)

Primary energy supply is well diversified...



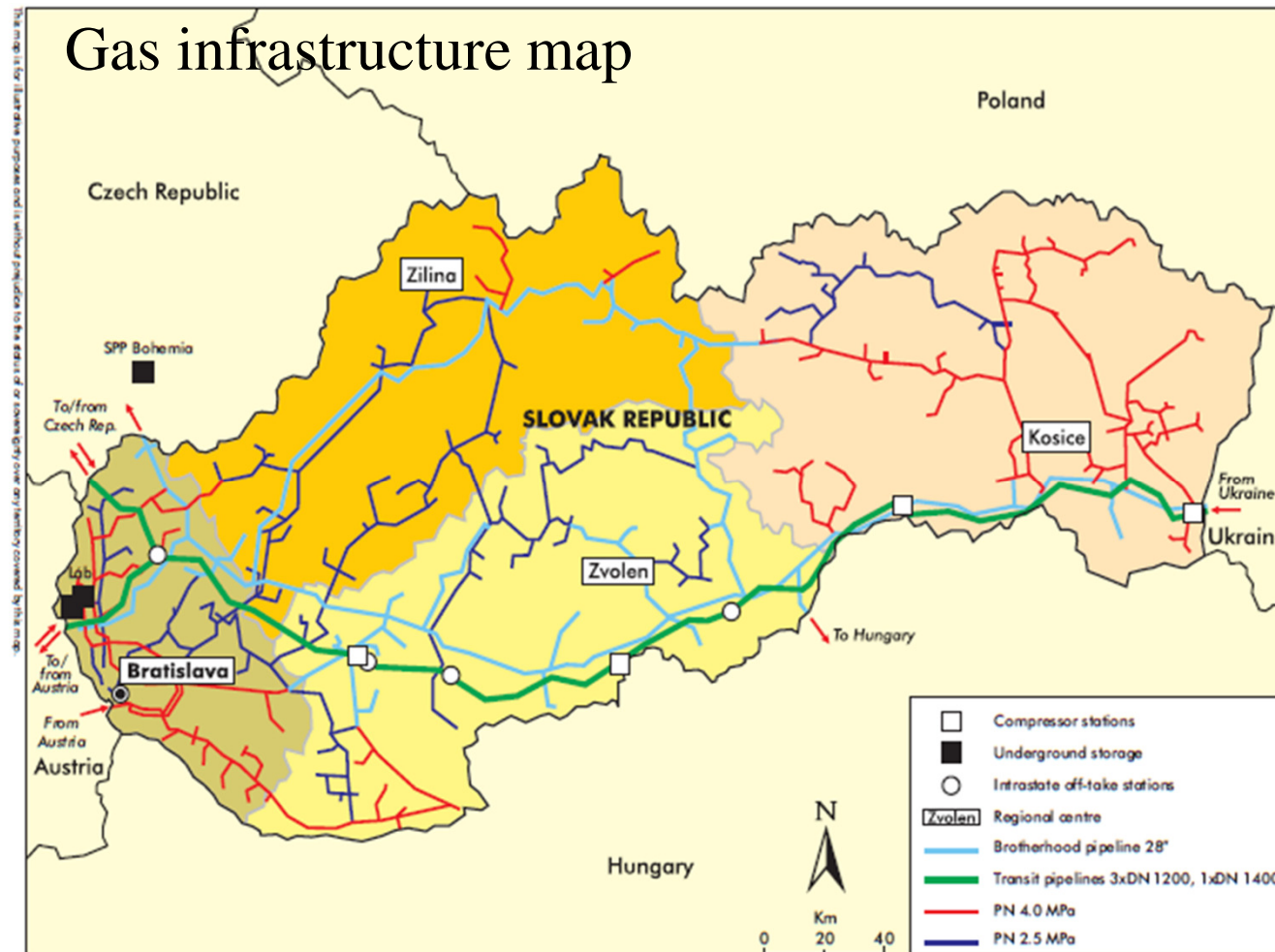
* negligible

...but nuclear powers more than half of electricity generation



* negligible

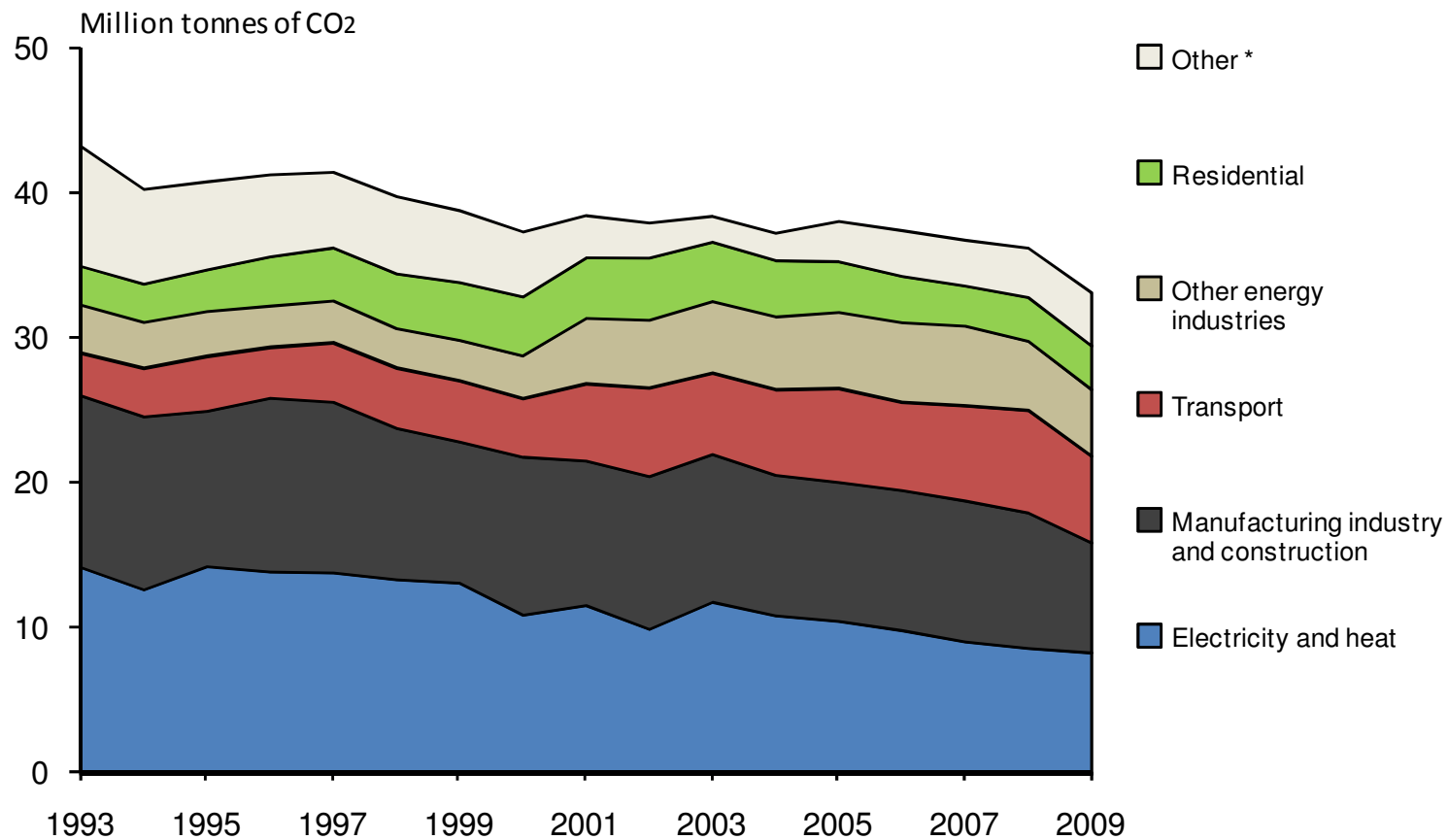
Gas and electricity market integration set to expand



Energy security

- Concerns over energy security are driven by high import dependence – nearly 100% for oil and gas
- Positive steps
 - Expanded storage reversibility of flows following the 2009 gas crisis
 - North-South gas pipeline
 - Regional cooperation

Further cuts needed in energy-related CO₂ emissions



* other includes emissions from commercial and public services, agriculture/forestry and fishing

Energy efficiency: accomplishments but still challenges

- Impressive gains in reducing energy intensity
 - 33% reduction between 2002 and 2008
 - But remains significantly higher than IEA average
- Adoption of the Strategy on Energy Efficiency in 2007 with a robust legal framework
- Challenges include:
 - Low levels of funding
 - Lack of consumer awareness
 - Deficit of trained technicians

Key recommendations (1/3)

The government of the Slovak Republic should

- *Enhance energy security by supporting infrastructure projects which diversify energy supply sources and routes.*
- *Continue to pursue its national energy policy objectives within a regional context, strengthening regional co-operation, integrating regional energy markets and supporting increased interconnections.*

Key recommendations (2/3)

The government of the Slovak Republic should

- Step up CO₂ emissions reduction efforts, notably in the transport and buildings sectors, including through the creation of a detailed plan with specific actions and interim targets and an assessment of the cost-effectiveness of different mitigation measures, to ensure the national target for non-ETS emissions is achieved.
- Ensure timely implementation of energy efficiency policies and measures and raise public awareness of energy efficiency improvement options, given the critical importance of energy efficiency for energy security, climate change mitigation and economic competitiveness.

Key recommendations (3/3)

The government of the Slovak Republic should

- Ensure a stable and predictable legislative framework, with an independent and adequately resourced regulator, to encourage investments in energy projects in accordance with the long-term national energy strategy.