

Achieving private-sector led reconstruction of energy sector

94th East Jour Fixe on “Ukraine: War-time economic resilience and reconstruction with a focus on the energy sector”.

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European-Ukrainian Energy Agency



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Our Role in Reconstruction



Bridging the gap between the **private sector**, policymakers and financial institutions.



Advocacy for sustainable energy policies during the war.













Facilitating foreign investment in Ukraine's green recovery & advocating for **de-risking mechanisms**.



Platform for **major RES investors** and energy efficiency experts.

The Roadmap to 9.5 GW by 2030

WHAT NEW GENERATION CAPACITY NEEDS TO BE BUILT BY 2030

Type of generation	 Gas-fired power plants	 New biofuel TPPs	 Energy storages	 WPPs	 PVs
Current installed capacity, GW	0,3	0,3	0,3	0,6	7,9
Installed capacity to be built	+1,4	+0,4	+1,2	+3,4	+3,1
Resulting installed capacity	1,7	0,7	1,5	4,0	11,0*
~ 8,3 Investments (€ billion)	 1,5	 1,6	 0,9	 3,1	 1,2
Expected non-discounted payback period (years)	3-4	5-6	3	4	4

Investment Need: Over **€8 Billion** required by 2030.

Decentralization: Each region requires a specific mix based on local geography.

*power on the DC side

Core Technology Priorities



Wind Energy

Massive development potential providing the cheapest electricity to the system.



BESS

Standalone and co-located storage to provide essential system flexibility.



Only for export

Biomethane

Utilizing Ukraine's vast agricultural potential for production of green gas.



Gas Peakers

Highly maneuverable gas-fired plants to balance prosumer volatility.

The Rise of the Prosumers

A massive trend is emerging: businesses and households are building distributed generation (primarily solar + storage) **behind the meter**.

This decreases grid consumption, requiring the system to adapt with enhanced **flexibility**.



Policy drivers for reconstruction: Storage

Special auctions for ancillary services

788 MW of balancing capacities procured

Opened the market for BESS

New storage regulations

Opened the business case for hybrid power plants

Baseline Scenario: Up to **1.5 GW** of BESS capacity by 2034

Policy drivers for reconstruction: Generating capacities

New rules for RES auctions

Feed-in Premium: Market-based support model replaces two-sided CFD.

Extended Terms: Support is extended to **2034**.

Hybrid Quotas: At least 10% of annual support reserved for **solar + BESS**.

Policy drivers for reconstruction: Grid connections

Capacity reservation for new wind

Investors in wind (>20 MW) can carry out project development for an **additional two years** without the risk of losing the approved technical conditions for grid connection

Unblocking grid access for real projects

Mandatory advance payment for grid connection has cleared the connection queue of dubious (dormant) applications

Cable pooling

shared use of a single grid connection point by multiple power producers to maximize infrastructure efficiency and reduce costs.

Policy drivers for reconstruction: Market coupling with the EU

Market coupling is a key step towards Ukraine's full integration into the European energy market. To implement it, Ukraine needs to adapt its legal framework and operational processes in the electricity market and its interaction with European counterparties in legal, organizational, and technical terms.

Market coupling law is approved

Price Caps Phase-Out

- **Minimum Caps:** Abolished **immediately**.
- **Maximum Caps:** Full removal by **May 1, 2027**.
- **Transition Period:** Ends **January 1, 2029**.

**Preliminary decision on market coupling:
January 1, 2028.**

De-risking mechanisms

Offtake guarantee – RAMP UP

Implemented by EBRD & World Bank

Mechanism: minimum price guarantee for new RES projects (two-sided CFD)

Backing: 300 mln EUR of donor fund (Ukraine Facility, Dutch Government and others)

War insurance

State insurance: Germany

Export-credit agencies: EIFO (Denmark), KUKE (Poland)

MIGA: No projects in energy yet

Private insurers

Thank you for attention!

Let's connect and work together.



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