
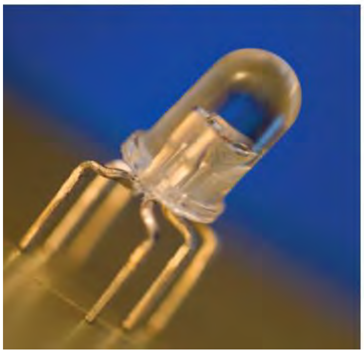


Assessment of climate change policies as part of the European Semester

Country Report Greece

26 January 2015

A report submitted by ICF Consulting Services
in association with

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1 Short Summary

Greece is characterised by a downwards trend as far as GHG emissions are concerned, mainly due to the slow rates of growth caused by the economic recession. No new policy developments as far as climate policy is concerned can be observed and GHG reductions are caused by the minimisation of economic activity.

The Greek non-ETS target under the Effort Sharing Decision (ESD) is -4% (compared to 2005) and non-ETS emissions were reduced by 20 % between 2005 and 2013, exceeding the interim target. According to the latest national projections submitted to the Commission and taking into account existing measures, the 2020 target is expected to be met by a margin of 1% points.

The key policy developments in the last year include radical changes in energy taxation with the introduction of a "security of supply" on natural gas and with the reduction of excise duty on heating oil. As far as renewable energy is concerned, the so- called "New Deal on RES" was put into force, resolving the uncertainty that has plagued the renewable energy sector in the previous years along with the introduction of a net metering support scheme. In relation to energy efficiency, there have been efforts for the continuation of successful energy upgrading programmes ("Exsoikonomo" and Exsoikonomo kat' oikon"). As far as the transport sector is concerned, the biofuel quota scheme has followed for the first time the process described in the amendment of Law No.3054/2012 along with a public consultation on the deployment of electric vehicles. Other policy developments concern the continuation of energy networks with the acceleration of projects concerning the interconnection of non-interconnected islands to the continental grid.

2 Climate and energy policy priorities

As far as GHG emissions are concerned, these increased by 3.7% (111 Mt CO_2) in 2012 compared to the base year (1990) (European Commission, 2014). There has been a downwards trend in GHG emissions trajectory since in 2011 as a result of the economic recession and the Eurozone crisis, which has had grave effects on Greece's economy., More specifically, Greece emitted 118.5 Mt CO_2eq (EEA 2012c), 13% more than in 1990, while this upwards trend was higher until 2010. .

Concerning climate policies there has been no climate action plan in place and it is not yet known if published specific action will be developed.

In Greece, primary energy production in 2012 amounted to 10,437 ktoe and mainly comes from fossil fuels, mainly lignite (8,136 ktoe- nearly 77%). Net imports amounted to 19,979 ktoe in 2012, mainly due to the import of crude oil and other hydrocarbons (23,023 ktoe) and consequently energy dependence is 66.6% (Eurostat, 2014; Eurostat, tsdcc310).Natural gas shows a steady increase (EEA, 2014a) in the primary energy production (3,662 ktoe) with renewable energy following (2,462 ktoe) (Eurostat, 2014). The share of renewable energy in gross final energy consumption is constantly increasing reaching 13.8% mainly due to wind and solar power (EEA, 2014a).

In April 2012, the Ministry of Energy, Environment and Climate Change proposed a renewable energy roadmap for 2050 (ΥΠΕΚΑ, 2012c). The different scenarios outlined in the draft suggest that more ambitious policies are necessary to reduce emissions by 80% in 2050, as agreed at EU level. However, this roadmap can be seen as outdated as the latest developments on the Greek energy sector, mainly due to the reforms of the renewable energy sector ("New Deal on RES") require an update of that roadmap.

3 GHG trends and projections

Greece reduced its total GHG emissions by 20% between 2005 and 2013. The share of GHG emissions not covered by the European Emission Trading Scheme (EU ETS) is around 46%, which is below the EU28 average (see Table 1).[1]

Table 1 Key data on GHG emissions

		National data				*EU28*
		2005	**2011**	**2012**	**2013**	***2013***
Total GHG emissions	Mt CO_2eq	135.3	114.7	111.0	107.8	4 539
Non-ETS emissions	Share in total emissions	47%	49%	45%	46%	*58%*

Source: EEA 2014a; EEA 2014c

By 2020, Greece needs to reduce its emissions not covered by the EU ETS by 4% compared to 2005, according to the ESD. The latest data for 2013 show that Greece not only met but exceeded its annual allocation interim target under the ESD for the year 2013 by a wide margin of 12.4 percentage points (see figures in Table 2). National projections indicate that the country will still exceed its 2020 target by about 1.0 percentage points with existing measures (WEM) and by about 4.2 percentage points with additional measures (WAM) (EEA 2014a).

Table 2 Non-ETS emission targets, trend and projections

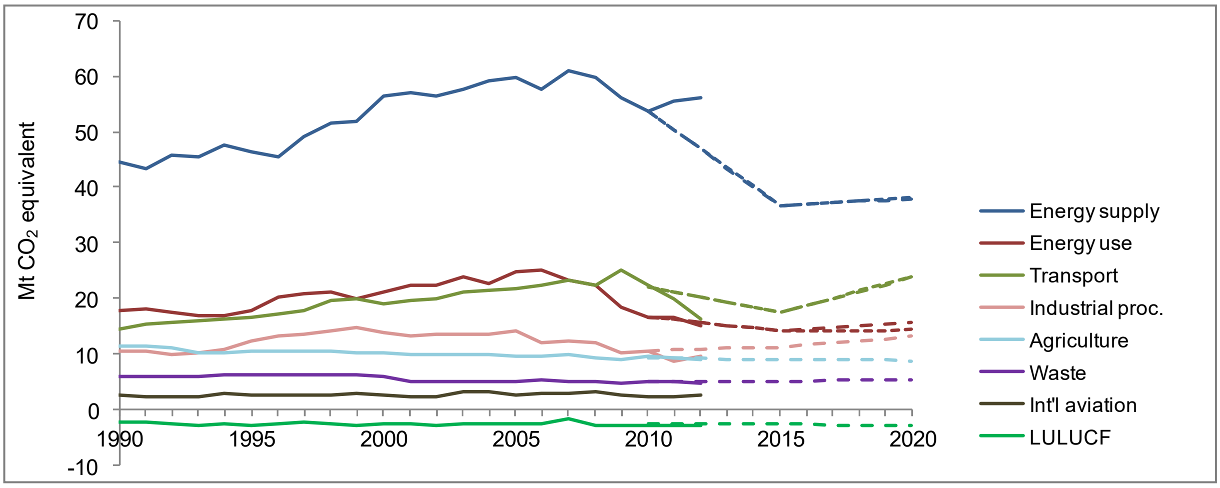
		Compared to base year
2013	ESD interim target	- 7.6%
	ESD emissions	- 20.0%
2020	ESD target	- 4.0%
	ESD projections WEM	- 5.0%
	ESD projections WAM	- 8.2%

Source: EEA 2014a. Green indicates target met or exceeded, orange indicates a value below.

GHG emissions are mainly created by the energy industries, followed by direct fuel consumption (e.g. households for heat generation) and the transport sector (see figure below for historic and estimated emissions by sector). Projections indicate that by 2020 emissions from energy use will be relatively constant. Emissions from the energy industry are projected to continue to decrease sharply until 2015 after which they appear to stabilise. Emissions from transport are projected to decrease until 2015, but increase until 2020 to a level comparable to emissions from 2009.

[1] The European Environment Agency has developed a complex methodology to measure progress on the Non-ETS/ESD targets of all EU Member States. This report uses the figures derived on this basis. A detailed explanation and the underlying absolute amounts are contained in Annexes 1-3 of the EEA report No 6/2014 "Trends and projections in Europe 2014. Tracking progress towards Europe's climate and energy targets for 2020" available at http://www.eea.europa.eu/publications/trends-and-projections-in-europe-2014/

Table 3 GHG trends and projections by sector



Source: EEA 2014a. Actual data until 2012 and projections from 2010 onwards. Dashed lines indicate the WEM projection, dotted lines the WAM projection.

4 Policy development

This section covers significant developments made in key policy areas between January and December 2014. It does so through three different perspectives: 1) progress on the policies communicated under the National Reform Programme 2) developments in the identified national priority sectors and policy areas.

4.1 Key policies as outlined in the National Reform Programme

Member States prepare National Reform Programmes (NRPs) each April outlining the country's progress and the key policies and measures to achieve targets under the EU 2020 Strategy.

Table 4 Key policies and measures as outlined by the NRP 2014

Financing of energy saving interventions in public buildings and residences	
Status in the NRP	With the introduction of Law No.4122/2013 (Buildings' energy efficiency) along with other programmes (Exsoikono and Exsoikonomisi kat' oikon) the energy upgrading of approximately 30,000 households and public sector buildings in 150 municipalities have been realised
Status as per Dec 2014	Expected
Description of policy	See Chapter 4.2.2

Reform of RES support account	
Status in the NRP	A number of amendments to the RES Law (Law No.3468/2006) has been put into force so as stabilise and contain the deficit account of RES
Status as per Dec 2014	Implemented
Description of policy	See Chapter 4.2.3

Upgrade of electricity distribution network incorporating digital technology	
Status in the NRP	The specific is expected to be realised through the replacement of the 80% of old meters with smart meters by 2020. The process has been described the FEK B/297/2013
Status as per Dec 2014	Expected
Description of policy	HEDNO (the Hellenic Distribution Network Operator) is currently carrying out an investment plan worth over 1.5 billion euros to upgrade the country's electricity distribution infrastructure. This includes the installation of new digital electricity meters, starting with the pilot installation of 200,000 meters (total budget 86.5 million EUR). The operator has announced an international tender for supply and installation of the meters and the deadline for proposal submission is 30 Jan 2015 (Ekathimerini, 2014; HEDNO, 2014)

Expansion of electricity transmission system on islands	
Status in the NRP	Included in the Ten Year Development Plan, a first tender on the expansion of electricity transmission system on islands has been issued. The main objective is the interconnection of non- interconnected islands with the continental grid.
Status as per Dec 2014	In force
Description of policy	See Chapter 4.2.5

4.2 National policy priorities

The below sub-sections provide updates on key existing and new policies in priority sectors and policy areas of relevance to the energy and climate targets under the Europe 2020 strategy[2]. Each sector or policy area contains information on the most important policy instruments in operation or development.

4.2.1 Environmental Taxation

In Greece the implicit tax rate on energy is the sixth highest in the EU with EUR 186 per ton of oil equivalent in 2012 (Eurostat, tsdcc360). Furthermore, the share of environmental tax revenues in overall tax revenue was 8.5% in 2012 and therefore above the EU average of 6.1% (Eurostat, ten00064). The same holds true for a comparison of environmental tax revenues with GDP, which amounted to 2.9% in 2012 (with the average at 2.4%) (Eurostat, ten00065).

In October 2014, a 30% reduction of the excise duty on heating oil was imposed[3]. More specifically, the 30% reduction, applicable from 15 Oct 2014 until 30 Apr 2015, will decrease the excise duty from 330 EUR/1,000 l to 230 EUR/1,000 l (Naftemporiki, 2014). According to the Report of the Greek General Accounting Office the reduction will cause a revenue loss of 133.58 million EUR (108.6 million EUR) from the excise duty and 24.98 million EUR from the VAT). However, the tax reduction will possibly result in the increase of heating oil consumption. An increase of 43.5% of heating oil consumption would balance the estimated revenue loss (Avgi, 2014).

Additionally, in June 2014, the Regulatory Authority on Energy (RAE) decided to introduce a "security supply levy" on natural gas for end-consumers which was implemented in October 2014. The levy was foreseen by Law No.4001/2011 (Operation of Electricity and Gas Energy Markets, for Exploration, Production and Transmission networks of Hydrocarbons). RAE's decision defines the cost per unit for

[2] The Consortium jointly with DG Clima identified these based on identified challenges in Country Profiles (EEA, 2014), share of sectors in total GHG emissions, and Country Specific Recommendations (2014). DG Clima has identified additional relevant issues to be reviewed for some or all Member States, including country specific energy challenges.

[3] In 2012, a uniform tax on diesel and heating oil was imposed (330 EUR/1,000 l) thus raising the tax on heating oil by around 450% at that time. This has led to a 70% decrease in sales of heating oil.

each category (electricity producers, industry and domestic users), varying between 0.16 EUR/ MWh for electricity producers to 0.46 EUR/ MWh for domestic consumers, as well as the aggregate sum needed (RAE, 2014a).

With the approval of the “New Deal on RES” (see Chapter 4.2.3) a drastic increase of the Special Levy for the Reduction of GHGs (ETMEAP)[4] that was foreseen by the RAE was prevented. RAE had initially decided (Decision No.663/2013) that the ETMEAP should increase an average of 97%, from 14.96 EUR/MWh to 29.5 EUR /MWh. For domestic consumers the increase would have been approximately 90%, from 20.8 EUR/MWh to 38.61 EUR/MWh. However, after the approval of the “New Deal” the increase will be significantly lower (Decision No.175/2014) and will amount on average to 19.73 EUR /MWh. For domestic consumers the ETMEAP will be increased to 26.3 EUR /MWh (RAE, 2014b).

4.2.2 Energy Efficiency

Within the EU28, Greece lies in the middle range (14th place) but has an above average energy-intensive economy. Energy intensity increased by 2% from 2005 to 2012. Greece is therefore the only EU MS that did not improve its energy efficiency (Eurostat, tsdec360). In contrast, the final energy consumption dropped by 18% between 2005 and 2012 with the reductions coming from all sectors, except the service sector (Eurostat, tsdpc320). Greece is currently on track towards its indicative EU energy efficiency target, mainly due to the economic recession (EEA 2014a).

Two successful programmes concerning energy efficiency upgrading of buildings have been further implemented in 2014. The first one is Exsoikonomo II which is a programme co-funded by the European Structural Funds and aims to support local authorities in their efforts to upgrade the energy performance of their buildings and infrastructure, including schools and public administration buildings. By Nov 2014, 63 projects had been approved, with an estimated budget of 51.7 million EUR (Energypress, 2014a). Energy upgrading of public buildings has been foreseen for the new Programming Period 2014-2020 with an estimated budget of 220 million EUR (MEEC, 2014b).

The second programme is “Exsoikonomo kat’ oikon”. The Programme aims at improving the energy performance and efficiency of residential buildings through the provision of interest-free loans and subsidies for the installation of RES and energy-saving measures and has a budget of €396 million. Already at the beginning of 2014, the Ministry of Energy, Environment and Climate Change (MEEC) requested the support of DG Energy so that the Programme can be added to the new Operational Programmes for the Programming Period 2014-2020 that will be submitted to DG Regio. More specifically, the estimated budget was not sufficient to finance all submitted applications (187,000 in total) (MEEC, 2014a). In Apr 2014, the continuation of the “Exsoikonomo kat’ oikon” was announced with the budget of 700 million EUR while further 200 million EUR will be distributed for energy savings in commercial buildings and 250 EUR million in public buildings (Econews, 2014a). However, an additional 8 million EUR will be given for the finalisation of the “Exsoikonomo kat’ oikon” of the previous Programming Period (approval of the already submitted applications) (Econews, 2014b)

All in all, energy efficiency programmes for the next Programmatic Period 2014- 2020 are estimated to create 15,000 new jobs on the building sector and realising energy savings between 35% to 40% (YPEKA, 2014b).

Apart from that, in Sep 2014, the Ministry of Environment, Energy and Climate Change (MEEC) has initiated the public consultation on the Energy Efficiency Bill, transposing the Energy Efficiency Directive (Directive 2012/27/EU). The bill includes the adoption of national indicative targets for energy efficiency and sets out measures, included in the National Energy Efficiency Action Plan, for their achievement (MEEC, 2014c).

4.2.3 Renewable Energy

The share of renewables in gross final energy consumption was 13.8% in 2012, which is above the indicative 2012 target of 9.1% set out by the Renewable Energy Directive (RED). The average annual

[4] ETMEAP is a special levy imposed on all electricity consumers and is paid as part of customers’ electricity bills. The revenues from the levy go to the Special Account for RES, which is then used to finance RES support schemes.

growth rate was 6.5% between 2005 and 2012. Thus, an annual growth rate of 9.5% is needed between 2013 and 2020 to reach the 2020 target of 18% (EEA 2014a). The share of renewable electricity generation in final electricity consumption almost doubled from 8.3% to 16.5% between 2005 and 2012, mainly due to wind and solar power after 2010. In addition, the share of renewable heating also almost doubled from 12.8% to 24.4% (Eurostat, SHARES 2014).

After lengthy discussions the so- called “New Deal on RES” was finally approved in Apr 2014. Law No. 4254/2013 contains amendment of the RES Law (Law No. 3468/2006). More specifically the provisions foresaw a review of the feed-in tariffs in place, a retroactive reduction of the feed-in tariffs of 2013 along with a 5 year extension of the purchase agreement for all renewable energy plans plants operating for less than 12 years.

A further amendment of the RES Law entered into force in Sep 2014 and it concerned the following provisions concerning the imposition of a maximum installed capacity on PV installations, priority concerning the connection offer to biomass and biogas plants, operated by certain public administration authorities as well as the extension of the obligation of renewable energy producers to submit a letter of guarantee

In addition, Law No. 4254/2013 foresaw the introduction of a “net metering scheme” by the end of Jun 2014 with the issues of Ministerial Decree. However, RAE finally announced the results of the second public consultation on net metering and its opinion on the introduction of net metering scheme in Oct 2014 (RAE, 2014c). The opinion describes the structure of the Ministerial Decree and specifies the technical provisions concerning the operation of the net metering scheme. Finally, the Ministerial Decree was finally signed on 31 Dec 2014 (Econews, 2014c).

The “New Deal on RES” was welcomed from all RES-related stakeholders, despite the fact some of them were more affected by provisions of the new regulations (Keep on Track, 2014). In addition, the uncertainty before the “New Deal on RES” had further grave consequences on the economic sustainability of RES investments, as revenue risk under the existing support scheme was apparent, with the Greek Electricity Market Operator (LAGIE) remunerating RES investors with a six month delay (Keep on Track, 2014). Surely, the situation was further aggravated by the existing financial situation in Greece that could not finance RES projects (Keep on Track, 2014).

4.2.4 Transport

GHG emissions, as well as energy consumption from transport, have increased between 1990 and 2012 but decreased since 2009. Also, the proportion of transport emissions among Greece’s total emissions increased through 2010 but decreased afterwards to reach 14% in 2012. Average emissions for newly registered cars are very low in Greece with a level of 111.9 g CO_2/km. This value is the second lowest in the EU and decreased by 33% between 2005 and 2013, at a greater rate than the average EU reduction of 22% (Eurostat, tsdtr450). Fuel taxation in Greece differs greatly between fuels. While the road fuel excise duties on petrol are the fourth highest among EU MS, the excise duties on diesel are the second lowest (EEA 2014b).

Greece’s vehicle taxes are only partly based on CO_2 emissions. The ownership tax is based on CO_2 emissions if registered after 2011 (ACEA 2014). A rather low road toll exists for certain parts of Greece’s road network (CE Delft 2012).

The Ministry of Energy, Environment and Climate Change has issued Ministerial Decree in Aug 2014 on the distribution of 133,000 kiloliters of biofuels for 2014 (MEEC, 2014d). Interestingly, the Ministry has already announced an invitation to interested legal persons to apply for the distribution of 140,000 kiloliters of biofuels for 2015 (MEEC, 2014e). This is the first time that the process of biofuel quota distribution follows the timeline stipulated by the amendment of Law No. 3054/2002 (RES Legal, 2014).

Apart from that, the Regulatory Authority on Energy (RAE) initiated in 5 Feb 2014 a public consultation on the definition of the institutional and operational framework for the integration of electric vehicle charging infrastructure in the Greek market with 13 natural persons and legal entities participating in the process (RAE, 2014d).

4.2.5 Energy Networks

On 10 Sep 2014, the Greek TSO (Independent Power Transmission Operator- IPTO/ADMIE) signed with the contractors the agreements for the first phase of the Interconnection of the Cyclades islands with the continental grid. The first phase foresees the interconnection of the biggest islands i.e. Syros, Tinos, Mykonos and Paros with the continental electricity grid. The first phase is expected to last approximately 22 months and has a budget of € 240 million. It should be noted that the budget is € 160 million less than the first tender, which was cancelled (IPTO/ADMIE, 2014a).

In addition, in July 2014, 12 interconnection projects have been characterised as “fast-track” projects. Under the current legislative framework i.e. Law No.3894/2010 and Law No.4146/2013, these strategic investments benefit from a favourable legal framework that enables the rapid realisation of such projects. All 12 interconnection projects have already been classified as Projects of Common Interest (PCIs). The projects include interconnections of Greek islands with the main electricity grid, as well as electricity and gas interconnections with other countries, such as an interconnection with the Transadriatic Pipeline (TAP) or an interconnection with Cyprus. It is estimated that these investments could create up to 17,000 new jobs (Energypress, 2014b).

Finally, on 9 May 2014, the first tender for the privatization of 66 % of the capital stock of the Greek TSO (Independent Power Transmission Operator- IPTO/ADMIE) has been completed. Five non-binding offers have been submitted to the Hellenic Republic Asset Development Fund (ΤΑΙΠΕΔ), coming from the European companies Elia and Terna, from the China State Grid, the India Power Corporation and a Canadian Investment Fund (PSP Investments). After evaluation, the successful bidders of the first round – being announced end of May 2014 - will be invited to submit a final and binding offer in a second phase (Energypress, 2014c) that is still on hold.

5 Policy progress against Country Specific Recommendations (CSRs) issued 2013

The EU Commission provides Country Specific Recommendations (CSRs) for each MS for consideration and endorsement by the European Council. The recommendations are designed to address the major challenges in relation to the targets of the EU 2020 Strategy. In the following table, the CSRs relevant for climate change and energy are listed, and their progress towards their implementation is assessed.

For Greece no CSRs have been issued in the climate and energy area.

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