

TABLE OF CONTENTS

INTRODUCTION	3
ACKNOWLEDGEMENTS	5
KEY MESSAGES	11
OVERVIEW	13
PART I. REGIONAL PERSPECTIVES	33
I. Energy Co-operation and Trade	35
II. Oil and Gas Transportation in Southeast Europe	69
III. Energy and Poverty	97
PART II. ENERGY POLICY SURVEYS	119
IV. Albania	121
V. Bosnia and Herzegovina	157
VI. Croatia	193
VII. FYR Macedonia	237
VIII. Montenegro	275
IX. Serbia	303
X. Kosovo³	345
ANNEXES	373
I. Energy Balances and Key Statistical Data	375
II. International Energy Agency Shared Goals	397
III. List of Acronyms and Unit Abbreviations	399
IV. References	407

3. At the time of preparation of this Survey, Kosovo was under the administration of the United Nations Interim Administration in Kosovo (UNMIK), according to the terms of UN Security Resolution 1244 of June 1999. This territory is referred to as Kosovo in this Survey.

List of Tables

1	Main economic data across the Western Balkan region, 2005	15
2	Main energy data across the Western Balkan region, 2005	16
3	Main energy and environment indicators across the Western Balkan region, 2005	24
4	Electricity demand and network losses in the Western Balkan region, 2005	37
5	Electricity trade in the Western Balkan region, 2006 (TWh)	37
6	Priority power generation and infrastructure projects in Southeast Europe, 2007	51
7	Major power plant rehabilitation and demand-side projects in the Western Balkans	58
8	Oil ports in the Western Balkans, 2005	74
9	Refineries in the Western Balkans, 2005	75
10	Characteristics of main oil transportation projects in Southeast Europe	81
11	Natural gas consumption and production in Southeast Europe, 2005 (Mcm)	82
12	Possible CNG ports in the Black Sea	90
13	Characteristics of main natural gas transportation project in Southeast Europe	90
14	The multi-dimensional nature of poverty	98
15	Unmet Basic Needs (UBN) in Albania (%)	101
16	Energy snapshot of Albania, 2005	121
17	Energy snapshot of Bosnia and Herzegovina, 2005	157
18	Energy prices in the residential sector of Bosnia and Herzegovina, 2003-07 (in EUR/unit)	168
19	Energy snapshot of Croatia, 2005	193
20	Main energy prices in Croatia by carrier and sector, 2005 (in EUR/unit)	204
21	Planned compulsory oil stocks in Croatia	209
22	Annual emissions of pollutants (in kt) in Croatia, 1990 and 2005	215
23	Energy snapshot of FYR Macedonia, 2005	237
24	Air pollution emissions in FYR Macedonia by sector, 2003 (kt)	252
25	Energy snapshot of Montenegro, 2005	275
26	Energy prices and taxes in Montenegro, 2005 (in EUR/unit)	285
27	Energy snapshot of Serbia, 2005	303
28	Implementation schedule of energy sector reform and priorities in Serbia, 2002-2015	314
29	Main energy prices in Serbia by carrier and sector, 2007 (in EUR/unit)	317
30	Energy snapshot of Kosovo under UN administration, 2005	345

List of Figures

1	Total primary energy supply for the Western Balkan region, 1990-2005 (ktoe)	17
2	Share of electricity output by fuel across the Western Balkan region, 2005 (%)	17
3	Cross-regional comparison of GDP in PPP, TPES, CO ₂ emissions and population, 2005	25
4	Net transfer capacity (MW) for Southeast Europe, 2007 Q1	39
5	Electricity prices across the Western Balkan region, 2005 Q4	42
6	Natural gas prices across the Western Balkan region, 2005 Q4	43
7	Dynamics of energy reform in transition economies	62
8	Albania's total final consumption by sector, 1990-2005	124
9	Albania's total primary energy supply by fuel, 1990-2005	125
10	Electricity consumption by sector in Albania, 1990-2005 (GWh)	144
11	Bosnia and Herzegovina's total final consumption by sector, 1990-2005	161
12	Bosnia and Herzegovina's total primary energy supply by fuel, 1990-2005	162
13	Electricity consumption by sector in Bosnia and Herzegovina, 1990-2005 (GWh)	179
14	Croatia's total final consumption by sector, 1990-2005	196
15	Croatia's total primary energy supply by fuel, 1990-2005	197
16	Electricity consumption by sector in Croatia, 1990-2005 (GWh)	224
17	FYR Macedonia's total final consumption by sector, 1990-2005	240
18	FYR Macedonia's total primary energy supply by fuel, 1990-2005	240
19	Institutional organisation for energy in FYR Macedonia	243
20	Electricity consumption by sector in FYR Macedonia, 1990-2005 (GWh)	261
21	Montenegro's total final consumption by fuel, 2005	278
22	Serbia and Montenegro's total final consumption by sector, 1990-2005	307
23	Serbia and Montenegro's total primary energy supply by fuel, 1990-2005	308
24	Electricity consumption by sector in Serbia and Montenegro, 1990-2005 (GWh)	333
25	Kosovo's total final consumption by fuel, 2005	348
26	Plans for lignite supply from individual lignite mines in Kosovo	359

List of Maps

1	The Western Balkan region	12
2	Electricity infrastructure of the Western Balkan region	45
3	Oil pipelines and pipeline projects in the Western Balkan region	76
4	Natural gas pipelines and main pipeline projects in the Western Balkan region	84
5	Albania's energy infrastructure	120
6	Bosnia and Herzegovina's energy infrastructure	156
7	Croatia's energy infrastructure	192
8	FYR Macedonia's energy infrastructure	236
9	Montenegro's energy infrastructure	274
10	Serbia's energy infrastructure	302
11	Kosovo's energy infrastructure	344

List of Boxes

1	The importance of fuelwood in the Western Balkan region	102
2	Energy poverty recognised by the Energy Community	106
3	Albania's <i>Energy Sector Strategy 2003-2015</i>	128
4	International technical assistance projects on energy policy and statistics in Bosnia and Herzegovina	164
5	Croatia's <i>Energy Sector Development Strategy 2002</i>	200
6	Montenegro's <i>Energy Development Strategy to 2025</i>	281
7	Serbia's energy infrastructure	305
8	Serbia's <i>Energy Sector Development Strategy to 2015</i>	313
9	Kolubara lignite power plants and coal mines	325
10	Kosovo's <i>Energy Strategy 2005-2015</i>	351
11	International and domestic assistance to Kosovo's energy sector, 2000-2006	360