

ENERGY EFFICIENCY IN LATIN AMERICA AND THE CARIBBEAN: PROGRESS AND CHALLENGES OF THE PAST FIVE YEARS

Executive Summary



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Energy efficiency in Latin America and the Caribbean: Progress and challenges of the past five years

Executive Summary



This document is a translation of the executive summary of “Eficiencia energética en América Latina y el Caribe: avances y desafíos en el último quinquenio” (LC/W.562), which was prepared by Claudio Carpio, consultant in the Natural Resources and Infrastructure Division of the Economic Commission for Latin America and the Caribbean (ECLAC), with the help and supervision of Manlio F. Coviello, Chief of the Division’s Natural Resources and Energy Unit.

The contributions to the study made by Hugo Altomonte, Chief of the Natural Resources and Infrastructure Division of ECLAC, as well as those of regional governmental officials and international consultants who supported the research, are gratefully acknowledged.

The document was supported by the German Federal Ministry for Economic Cooperation and Development (BMZ) and the German Technical Cooperation agency (GTZ).

The views expressed in this document, which has not undergone formal editing, are the sole responsibility of the author and may not necessarily reflect those of the Organization.

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Introduction

The present document analyses the progress of national programmes and activities associated with the promotion and development of energy efficiency between the years 2008 and 2013 in the 27 Latin American and the Caribbean member countries of the Latin American Energy Organization (OLADE).

The new study is based on the original report —prepared by ECLAC and OLADE between July 2008 and July 2009¹— taking into consideration any progress made over the past four to five years, an interval long enough to justify an update both of the current status of energy efficiency and its prospects, developments and challenges in the Region of Latin America and the Caribbean.

The country updates were focused on the following aspects of national Energy Efficiency programmes and activities carried out by each country:

- Progress in the political, regulatory and institutional framework during the review period
- Key new actors in energy efficiency and their impact
- The resources and financing mechanisms of the energy efficiency programmes
- The programmes and their outcomes (once known and assessed) from 2008 to the present
- The remaining barriers, both general and specific to each country, where relevant
- The lessons learned, both prior and subsequent to the period under analysis

In general, there have been clear improvements in the focus on and diligence about the issues surrounding energy efficiency in most countries. This has been due mainly to the conviction that climate change is a reality and that one of the most efficient ways of mitigating its impacts is by implementing cost-effective energy efficiency policies.

¹ ECLAC Document # LC/W 280: '*Situación y Perspectiva de la Eficiencia Energética en América Latina y el Caribe*', (Energy Efficiency Status and Outlook in Latin America and the Caribbean), October 2009.

A. The political, regulatory and institutional framework during the period 2008-2013

Evaluation of progress made shows that there have been clear improvements in most countries, albeit to varying degrees.

Some examples include: the official publication of legislation on energy efficiency in Uruguay (2009), which included a law establishing a Trust Fund to finance energy efficiency projects; Venezuela (2011), Panama (2012), Supreme Decrees regulating the Energy Efficiency Law (Peru, 2007), and the preparation of Bills of Law in several other countries (Guatemala, El Salvador, Nicaragua, the Dominican Republic and Grenada).

These new laws and/or bills of law can be added to the list which includes a Law on the Rational Use of Energy (URE Law) in Costa Rica which is one of the oldest in force (1994), an Energy Efficiency Law in Brazil (2001, product of a severe energy supply crisis) and another in Colombia (URE Law 697 of 2001).

The study was thus able to verify the consolidation of institutional actors involved in energy efficiency and the creation, in some cases, of new institutional frameworks: Vice-Ministry of Energy Development responsible for Energy Efficiency (Bolivia, 2007), the Bolivian Energy Efficiency Network (April 2013), the Ministry of People's Power for Energy Efficiency (Venezuela, 2009), the Chilean Agency for Energy Efficiency (2010), the National Office for the Rational Use of Energy of Cuba, the Colombian Energy Efficiency Council (private sector, Colombia, 2010), the Ministry of the Environment, Energy and Seas (Costa Rica, 2012), the National Energy Efficiency and Renewable Energy Institute (Ecuador, 2012), and finally, the resurgence of the National Commission for the Efficient Use of Energy, CONUEE (Mexico, 2012).

Analysis of the 27 countries demonstrates the existence of natural differences in the regulatory frameworks for energy efficiency unique to each country which, in consequence, prevent the establishment of simple "common denominators" for the Region.

However, there is evidence of a tendency in most countries to establish national energy efficiency programmes (or to strengthen any such programme already in existence), backed by the legal and regulatory support necessary to uphold government policy on energy efficiency.

B. Key energy efficiency actors, their impact and their progress between 2008 and 2013

In most countries, the activities, projects and programmes associated with the promotion and development of energy efficiency have remained in the public domain, under the direction of ministries, national commissions and/or secretariats or energy divisions, having varying degrees of visibility and influence according to country. There have been no 'Energy Efficiency –type Agencies' created during the period, except in Chile, although several concepts are being evaluated in a few countries (Colombia, Grenada, Peru, Trinidad and Tobago, and Jamaica), all of which are intended to create an Energy Efficiency Unit, or suchlike, by law.

Similar to the conclusions of the previous study, there are still very few cases in which the energy distribution enterprises encourage energy efficiency among their clientele and, in such cases, the focus is on reducing peak demand to mitigate specific supply issues; similarly, few of these enterprises actually manage energy demand in a systematic manner.

In synthesis, the scope and efficiency of public and private actors involved in the promotion and development of energy efficiency programmes in countries in the Region is the result of four main factors: (a) the political support of Governments; (b) continuity in the efforts and of the frameworks associated with energy efficiency; (c) ability to access financing; and (d) capacity to report on "what can be done" in each demand sector in order to develop energy efficiency strategies.

C. Resources and financing mechanisms for energy efficiency programmes

In most countries, the funds used to promote and develop energy efficiency are derived mainly from national budgets, which implies —with the exception of those countries with dynamic energy efficiency policies— significant limitations to their implementation.

There still exists a high level of participation of multilateral organizations providing support in the form of loans and/or technical cooperation focused on energy efficiency projects or programmes, as well as smaller ad hoc contributions (mainly of European origin) for specific projects. This proliferation of donors lacks overall supervision and tends to produce duplications in the interventions.

Nonetheless, in updating the document to incorporate the new period into the analysis, the report has found evidence of a substantial increase in the number of ways of boosting the funding available for energy efficiency, arising many times from the need to meet environmental goals related to mitigating the impacts of climate change. For example, Bolivia is setting up a Bolivian Energy Efficiency Fund; Uruguay has established the Uruguay Trust Fund for the Development of Energy Efficiency (FUDAEE); Argentina is designing a Fund for the development of energy efficient projects under a Global Environment Facility (GEF/BM) support framework, and so on.

There has been a proliferation of the number of financial institutions, mostly public and some private, offering various kinds of facility for the evaluation and implementation —once proven feasible— of energy efficiency projects.

D. The degree of evaluation of the results of energy efficiency programmes in each country

The degree of evaluation of the results of energy efficiency programmes in each country was based on the quantity and quality of the information available: this was not entirely satisfactory in terms of its validity for drawing meaningful conclusions about whether a national programme was on the right track, or not achieving goals and needing to be rectified.

Analysis of the data confirms that the quality of the statistics and performance indicators that enable the results of national energy efficiency programmes to be quantified continues to be unsatisfactory.

ECLAC, in a effort to bridge this gap, is working on the issue of energy efficiency indicators through the BIEE (Base Indicators for Energy Efficiency in Latin America and the Caribbean) regional programme, which is based on the technical and political process and the operational logic of the European Commission ODYSSEE programme.² The expectation is that a set of specific indicators would be developed that would enable the progress of national energy efficiency programmes to be determined, the results analysed and —in

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