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Uzbekistan outdoor power supply monopoly



Overview

Proceeding from the assumption that the provision of electric power is a natural monopoly, where the single state-owned monopolist can be the most efficient supplier, the Uzbek government has long maintained a model where the single incumbent – JSC Uzbekenergo, has been responsible for the power generation, transmission, distribution, dispatch management, and retail sales, operating through its affiliates in each region of the country. How can Uzbekistan improve its energy supply?

A critical issue is how to increase efficiency, attract investments and new entrants, and diversify energy supply in Uzbekistan's current energy system in which gas, electricity and heat are supplied by financially burdened monopolies at strongly subsidised prices.

Does Uzbekistan have an energy surplus?

Uzbekistan has historically been an energy surplus nation, ranking fifth in Eurasia in 2021. Nevertheless, increasing domestic energy demand has significantly reduced net energy exports. Indeed, net energy exports amounted to just 1% of total energy production in 2021.

How much of Uzbekistan's electricity demand goes unmet?

by 3% or 5% prior to 2017. The Ministry of Energy has reported that an estimated 10% of Uzbekistan's electricity demand goes unmet due to capacity constraints.¹⁶ We assume that, through capacity expansion efforts, Uzbekistan will fully meet this previ.

How will Uzbekistan support supplementary power?

A crucial aspect of this plan is ensuring that regions facing energy deficits can receive supplementary power from other areas. The government plans to invest \$4 billion in the National Electric Grid of Uzbekistan over the next five years to facilitate these projects.

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