

How dangerous is Ukraine's energy infrastructure in 2024?

With the escalation of attacks against Ukraine's energy infrastructure in 2024, the risks are significantly higher this winter. Temperatures can routinely drop below -10 °C between December and March, posing a serious humanitarian risk if heating is not available.

Does decentralisation drive energy security in Ukraine?

Despite the high investment risks, the construction of a more decentralised system has begun, increasing resilience to attack and laying the groundwork for a distinctive longer-term transition pathway. In contrast with other countries, where decentralisation has been driven by sustainability concerns, the clear driver in Ukraine is energy security.

Is Russia targeting Ukraine's energy system?

Ukraine's energy system has been regularly targeted by Russia since its full-scale invasion in 2022, with attacks intensifying since the spring of 2024. The targeting of energy infrastructure has had wide-ranging consequences for the provision of energy to Ukrainian households and other consumers.

Can European companies use Ukraine's large storage sites?

Ukraine can offer the bulk of its large storage sites (30 bcm, mainly in Western Ukraine) for use by European companies, but security risks mean that European traders have so far made limited use of this option. Lower storage utilisation weighs on the revenue and profitability of Ukraine's system operator.

How important is interconnection to Ukraine's electricity security?

Interconnection with the main European system has made a crucial contribution to Ukraine's electricity security, with the limit on cross-border trade increasing to 1.7 GW in November 2023. Before the 2022 invasion, Ukraine's power system was interconnected with the Russian and Belarussian grids.

How important is Ukraine's energy sector?

Ukraine's air defences provided some protection, but the scale of the attack and the resulting disruption highlighted once again the vital strategic importance of Ukraine's energy sector, as well as the ever-present risks to the country's energy supply.

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