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GREEN Action Task Force

Aligning short-term recovery measures with longer-term climate and environmental objectives in Eastern Europe, Caucasus and Central Asia

Annual Meeting of the GREEN Action Task Force, 12-13 October 2021, Video Conference

Discussion Paper under agenda item 3. This discussion paper provides new evidence on the environmental impact of COVID-19 spending in the EECCA region in 2020 and 2021. The analysis tracks and assesses more than 100 COVID-19 related spending policies in 11 EECCA economies for potential impacts on the environment. It hopes to bring transparency and provide guidance and inspiration to EECCA governments seeking to 'build back better' economically and sustainably. It is a work-in-progress, being refined over the coming months. Readers are invited to verify information contained within this paper and updates on forthcoming policy developments.

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Aligning short-term recovery measures with longer-term climate and environmental objectives in Eastern Europe, Caucasus and Central Asia

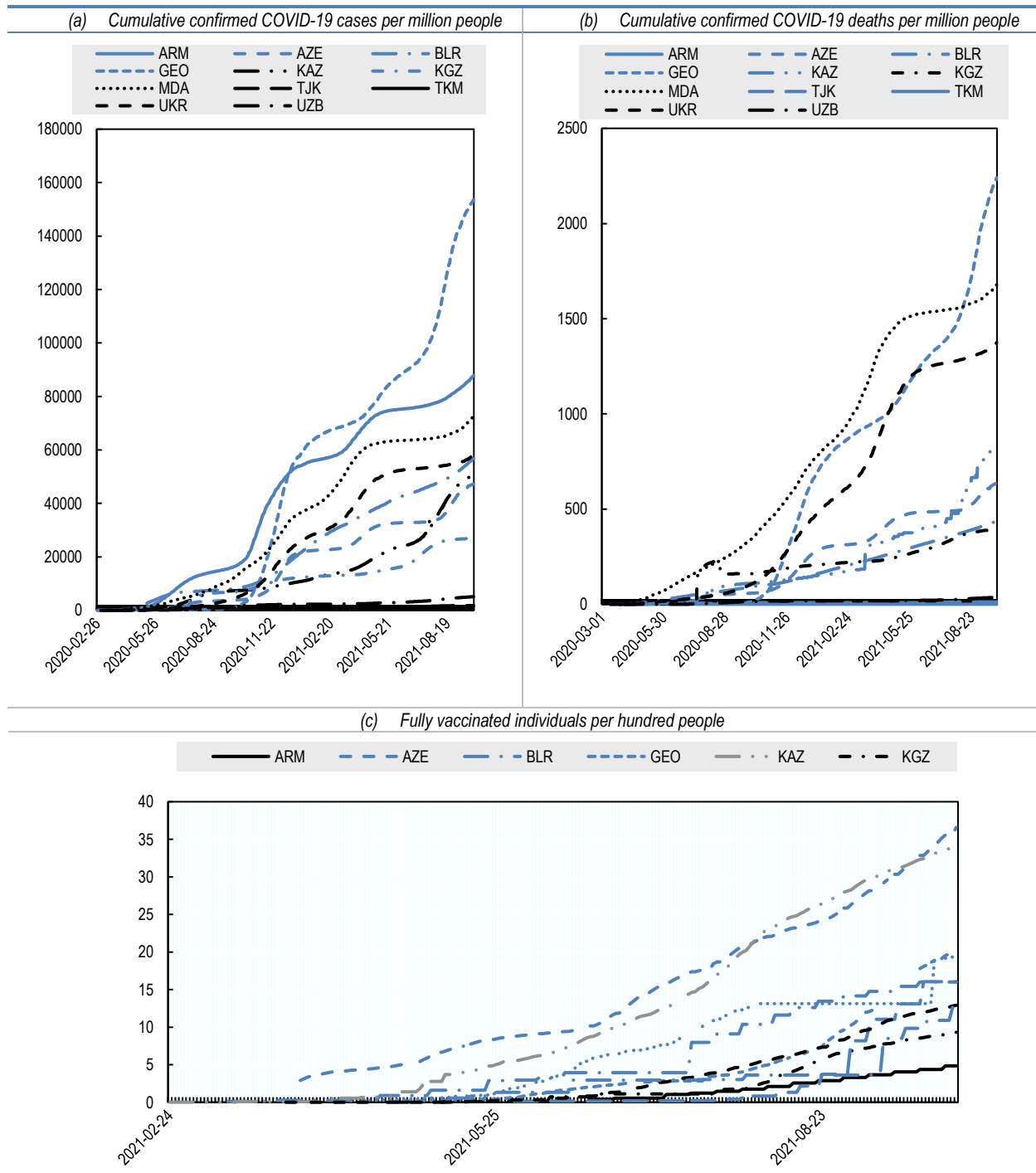
Since the declaration by the World Health Organisation of COVID-19 as a pandemic, the region of Eastern Europe, the Caucasus and Central Asia (EECCA), like the rest of the world, suffered waves of infections and deaths (Figure 1(a) and (b)). In recent months, the epidemiological situation started to improve thanks to vaccination programmes that have accelerated throughout the region, although they have often faced severe limitations due to vaccine supply constraints (Figure 1(c)).

The February 2021 OECD policy brief "[COVID-19 and greening the economies of Eastern Europe, the Caucasus and Central Asia](#)" showed that many EECCA countries acted swiftly during the initial stages of the COVID-19 pandemic with emergency public health measures including stay-at-home orders, limitations on public gatherings and border restrictions and closures. It analysed the environmental impacts of the emergency response (or 'rescue') measures put in place to curb the spread of COVID-19, cushion health measures' impacts on people's livelihoods and prop up employment. While many of these responses had predominantly mixed and negative impacts on environmental objectives, a few "green" response measures emerged as potential good practices in the region.

The latest OECD analysis of recovery measures (excluding emergency rescue measures) in OECD countries, the EU and large emerging economies revealed a similar trend. Only 21% of spending qualified as environmentally positive, while approximately 10% of recovery spending had environmentally negative or mixed impacts. The remaining 69% of funds were not categorised as having a direct environmental impact, but they are unlikely to be entirely benign for the environment. Given the relatively small share of explicitly green measures in recovery packages, the overwhelming majority of spending supports status quo, business-as-usual type activities (OECD, 2021^[1]).

This present discussion paper provides new evidence on the environmental impact of spending on both rescue and recovery measures in the EECCA region in 2020 and 2021. The analysis tracks and assesses more than 100 such measures and projects in 11 EECCA economies for potential impacts on the environment. It also provides an overview of existing policy measures with environmental and climate objectives across the region in Annex A: Country profiles. It aims to bring transparency and provide guidance and inspiration to EECCA governments seeking to 'build back better' towards a greener, more resilient and inclusive economy. It is a work-in-progress, being refined over the coming months. Readers are invited to verify the information contained in the paper and provide updates on forthcoming policy developments.

Figure 1. Evolution of the COVID-19 pandemic in EECCA countries (Q1 2020-Q4 2021)



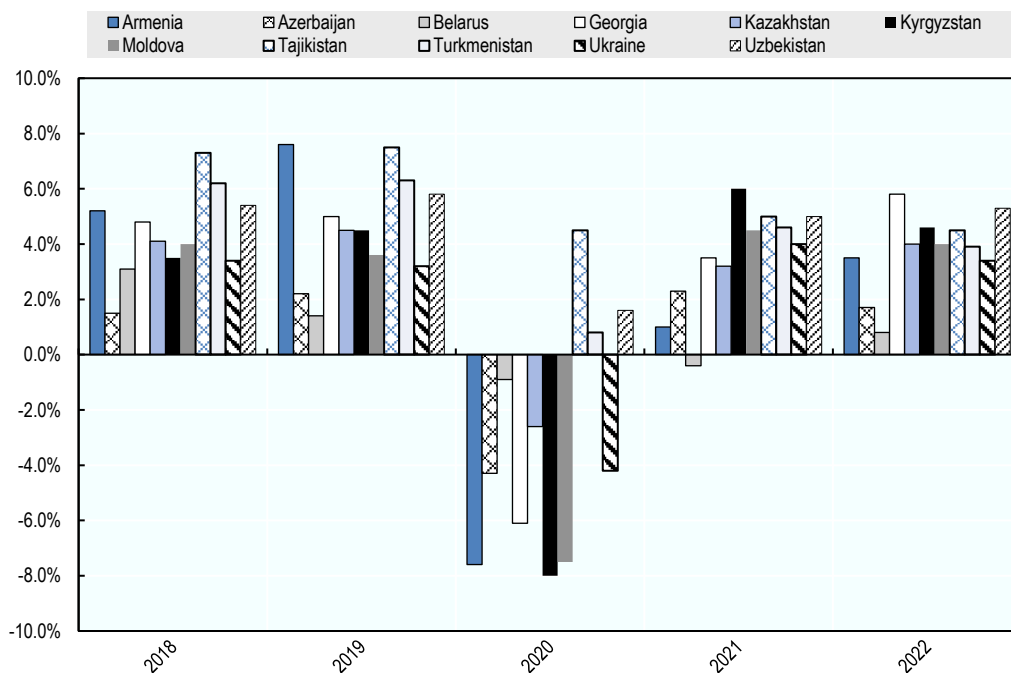
Note: Confirmed case and death figures are underestimates of actual case and death numbers. Methodology and testing rates vary widely, and international comparisons are necessarily flawed.

Source: Authors' elaboration based on Roser, M. et al. (2021^[2]), Coronavirus Pandemic (COVID-19), OurWorldInData.Org, <https://ourworldindata.org/coronavirus>

Economic impacts of the pandemic

Following sharp drops in real GDP across most EECCA countries in 2020, the region is expected to return to positive year-on-year GDP growth in 2021 and 2022 (Figure 2). Although the COVID-19 pandemic is ongoing, EECCA countries have turned their attention to longer-term economic recovery packages. The design and implementation of these recovery measures will impact EECCA countries' ability to meet their environmental objectives, including climate change mitigation and adaptation goals under the Paris Agreement. For instance, governments could have taken advantage of the opportunity presented by low fossil fuel prices in 2020 to accelerate the phase-out of fossil fuel subsidies. Lower prices could have made it easier to reduce consumption subsidies, especially if the government reallocates funds to health care and economic stimulus (OECD, 2021^[3]). Preliminary data suggest governments have missed this opportunity. In Ukraine, coal extraction volumes have decreased consistently over the past decade, but fiscal support-type subsidies per tonne have increased fivefold since 2015, including a rise from UAH 9 in 2019 to UAH 10 in 2020 (Zachmann, 2021^[4]).

Figure 2. Annual real GDP growth rates (2018-2022)



Note: Values for 2021 and 2022 are forecasts made in April 2021.

Source: Authors' elaboration based on IMF (2021^[5]), "Real GDP growth: Annual percentage change", *World Economic Outlook (April 2021)*, https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEO_WORLD

Why a green recovery?

The COVID-19 pandemic severely impacted not only the global economy in terms of GDP, but has accelerated a re-evaluation of how economic activities are carried out. The pandemic profoundly disrupted economic activities and forced companies and governments to revisit assumptions about which tasks must be performed in person and which could potentially take place virtually. As countries chart their course out of the economic downturn, they should ensure that the development of policy measures to stimulate the economy are aligned well with other important environmental and social objectives. Delayed action on

climate change, for instance, would be more costly in the long term compared to swifter, multidimensional action due to the lock-in of greenhouse gas-intensive infrastructure systems and modes of production. To the extent possible, measures should take advantage of synergies between environmental, social and economic goals, driving progress on economic recovery and essential global commitments (e.g. the Paris Agreement, the Sustainable Development Goals) simultaneously (Buckle et al., 2020^[6]).

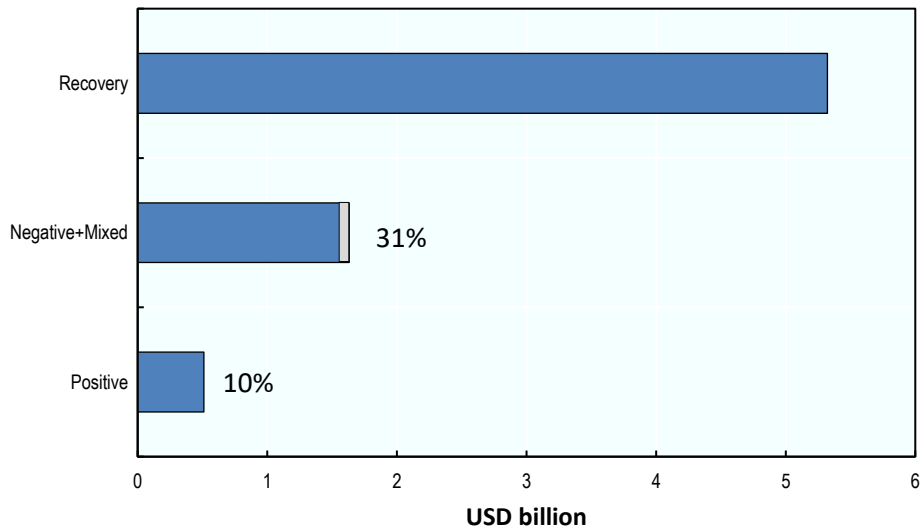
A recovery driven by green investments, natural capital preservation and employment measures focused on sustainable job creation would have important co-benefits. Growing evidence suggests that green recovery projects (e.g. support for renewable energy infrastructure projects) outperform traditional stimulus measures in terms of job creation and their fiscal multiplier. Moreover, investment in certain greener technologies such as wind and solar power generation leads to lower upfront capital and installation costs, which in turn facilitates their further development and integration as they outcompete carbon-intensive alternatives (Coalition of Finance Ministers for Climate Action, 2020^[7]). Cleaner infrastructure systems and less emissions-intensive economies also improve health outcomes by reducing ambient air pollution and the incidence of respiratory and cardiovascular disease. A green and just recovery could reduce global urban air pollution by as much as 29% over the next 10 years compared to the business-as-usual scenario, preventing in excess of 270 000 premature deaths across over 100 urban areas and saving USD 1.4 billion in health care costs (C40 Cities Climate Leadership Group, 2020^[8]). Reducing ecosystem destruction and rehabilitating depleted ecosystems through, for instance, forest management can create jobs (500-1 000 jobs per USD 1 million in developing countries; 20-100 in developed and middle-income countries), limit biodiversity loss, preserve and strengthen forests' carbon absorption properties and reduce risks of future zoonotic disease transmission (UNEP, 2021^[9]; UNEP, 2021^[10]).

How green is the recovery so far in the EECCA region?

The COVID-19 pandemic triggered enormous fiscal spending from governments around the world and financial resources from international development partners in 2020 and 2021. Despite significant evidence that suggests fiscal policies with an environmental focus are effective tools for economic recovery, very little green spending of this kind was announced in 2020 and 2021.

This paper records USD 15.6 billion in spending on rescue and recovery measures across 11 EECCA countries in 2020 and 2021. The tracking exercise distinguished between 'rescue' measures and 'recovery' measures to ascertain the share of those projects that were implemented as more immediate emergency response (rescue) versus those with a longer-term impact (recovery) (see Box 1 for further information on methodology). USD 5.3 billion (34%) was directed to medium- and long-term recovery measures and of that, USD 511 million (10%) to green recovery initiatives (Figure 3). Considering total spending (i.e. recovery plus rescue measures), only USD 513 million (3%) was announced for green initiatives (Figure 5). This finding is in line with other tracking tools that use similar methodologies (e.g. (O'Callaghan et al., 2020^[11]; OECD, 2021^[1])). Measures driven by international development partners account for the majority of green investments.

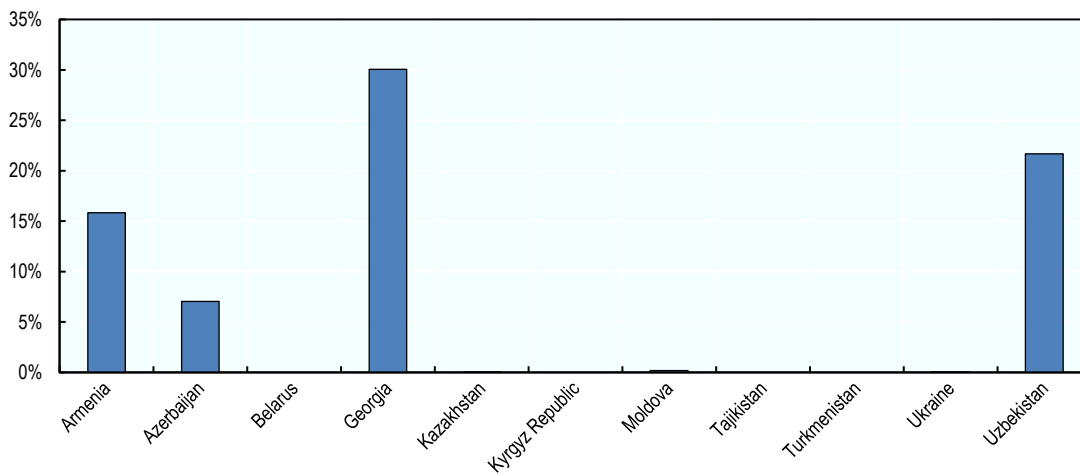
Figure 3. Funding allocated to ‘recovery’ measures by environmental impact



Source: Authors' elaboration based on database of measures compiled by the OECD, which includes projects from (O'Callaghan et al., 2020^[11]) and (Energy Policy Tracker, 2021^[12])

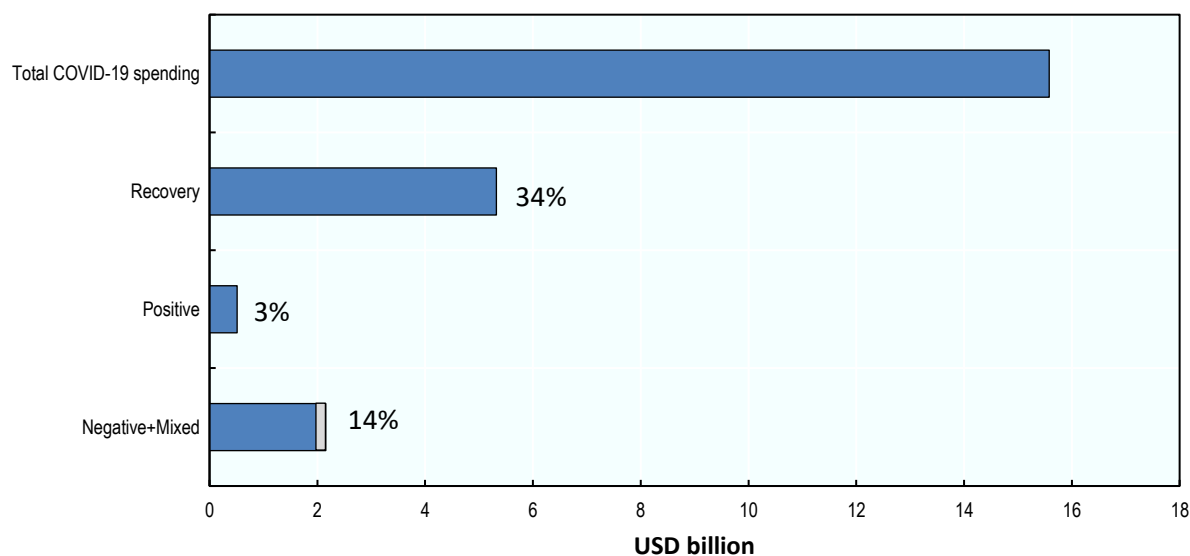
The small percentage of measures tagged as “positive” implies that total stimulus packages overall still lean heavily towards investments in business-as-usual type activities, rather than the transformational investments required. The larger percentage tagged as “negative” implies the same. As shown in Figure 4, the large majority of measures (66%) was directed towards short-term rescue rather than medium- to long-term recovery. The share of recovery projects in total COVID-19-related spending is still larger than that identified in other similar tracking exercises. Unless this is due to an underrepresentation of rescue measures in the data (see Box 1), it could mean that EECCA countries are looking ahead and want to emerge stronger from the crisis.

Figure 4. Percentage of green spending out of total recovery spending by country



Source: Authors' elaboration based on database of measures compiled by the OECD, which includes projects from (O'Callaghan et al., 2020^[11]) and (Energy Policy Tracker, 2021^[12])

Figure 5. Assessment of total COVID-19 related spending policies in EECCA countries



Source: Authors' elaboration based on database of measures compiled by the OECD, which includes projects from (O'Callaghan et al., 2020^[11]) and (Energy Policy Tracker, 2021^[12])

Some key findings emerge from the analysis:

- **USD 0.5 billion or 10% of recovery spending is green.** This is unevenly distributed across the region with 30% of the green recovery spending in Georgia, almost 22% in Uzbekistan, almost 16% in Armenia and 7% in Azerbaijan. Very little or zero green recovery spending could be identified in Belarus, Kazakhstan, Kyrgyz Republic, Moldova, Tajikistan, Turkmenistan and Ukraine.
- **USD 350 million¹ is planned for low-carbon energy,** largely thanks to the European Investment Bank supporting large-scale renewable energy generation projects in Uzbekistan.
- **USD 60 million is used to improve urban infrastructure.**
- **USD 20 million is used to support sustainable agriculture.**
- **USD 16 million is used for greening SMEs.**
- **USD 10 million is used for green lending.**
- **USD 3.5 million is used to build resilience.** Adaptation has a key role to play to adapt to the negative consequences of climate change on the region. It saves lives. Recovery spending has so far missed the opportunity to increase resilience to climate-related disasters.
- **USD 2 million is invested to protect ecosystems.** Ecosystem services improve quality of life, increase resilience and are difficult to rebuild once they are lost.
- **Only one of the green projects had a gender component.**
- **No investment into green R&D could be identified,** except a capacity-building project for green hydrogen in Ukraine. Without progress in green R&D and green innovation meeting the Paris Agreement targets will require far-reaching pricing and lifestyle changes.
- **Investments in green transport and to increase energy efficiency present further opportunities to accelerate a green recovery.**

¹ This number is awaiting confirmation by the European Investment Bank.

Box 1. Notes on methodology

The present analysis tracks and assesses more than 100 COVID-19-related spending policies in 11 EECCA economies for potential impacts on the environment. It includes both fiscal measures by the countries and financial resources provided by international cooperation partners such as international financial institutions, bilateral cooperation agencies and UN organisations. Particular efforts were made to include expenditure, i.e. those measures where monetary values could be found. Less than 3% of the projects in the analysis do not have USD values. The data was compiled through desk research using government websites, press releases, government databases, project-level information from international financial institutions (IFI), bilateral development cooperation partners and UN agencies. In-country advisors provided or verified some of the information. The analysis also used existing data from the [Global Recovery Observatory](#) and the [Energy Policy Tracker](#), which was then checked and verified. Although care has been taken to avoid double-counting IFI spending, bilateral spending and national allocations, it is still possible that some overlap exists at this stage.

Measures were assessed for their potential environmental impact (e.g. greenhouse gas emissions, air pollution, natural capital). The assessments considered the environmental impact of the policy versus a scenario in which no intervention is made following the assessment methodology developed by the Oxford University Economic Recovery Project. Measures were categorised as “positive” if the national rate of emissions or air pollution is likely to reduce compared to a scenario where the investment is not made (e.g. investments in new renewable energy capacity). They were categorised as “negative” if the national rate of emissions or air pollution is likely to increase in comparison to a scenario where the investment is not made (e.g. investments in existing fossil fuel infrastructure). The measure was marked “0” in both categories if it will have little or no change on national emissions or air pollution. For policy impacts on natural capital², the policy measures was marked “positive” if it is expected to increase the quantity or quality of natural capital. Examples could be tree planting or sustainable tourism. It was marked “negative” if the policy measure is expected to lead to a decline in the quantity or quality of natural capital. ‘Little net change’ (0) was used for an expected overall negligible or net zero effect on natural capital. The measures were marked as “mixed” if they are likely to have both positive and negative environmental impact.

Due to the present study’s focus on the recovery, it only captures measures with a direct COVID-19 angle. Other projects were launched during this time, e.g. the Tutly Solar Plant in Uzbekistan, a 100 MW solar photovoltaic plant located in the Samarkand region (EIB, 2021_[13]). Since this and other green projects were not implemented specifically in response to the pandemic, they are excluded.

To capture the full breadth of COVID-19 related measures, the assessment distinguishes between rescue-type (short-term measures designed for emergency support to keep people and businesses alive) and recovery-type (long-term measures to boost economic growth) spending, following the typology developed by the Global Recovery Observatory. When policy packages included components of both types and it was not possible to determine how much was spent under each type, they were included as recovery spending. This was the case for 13% of measures with monetary values and might therefore skew results slightly in favour of recovery spending. Inherent in any such tracking exercise is

² Natural capital is defined as the stock of the world’s natural assets, both renewable and non-renewable. This includes water, soil, forests, green spaces, and ecological systems.

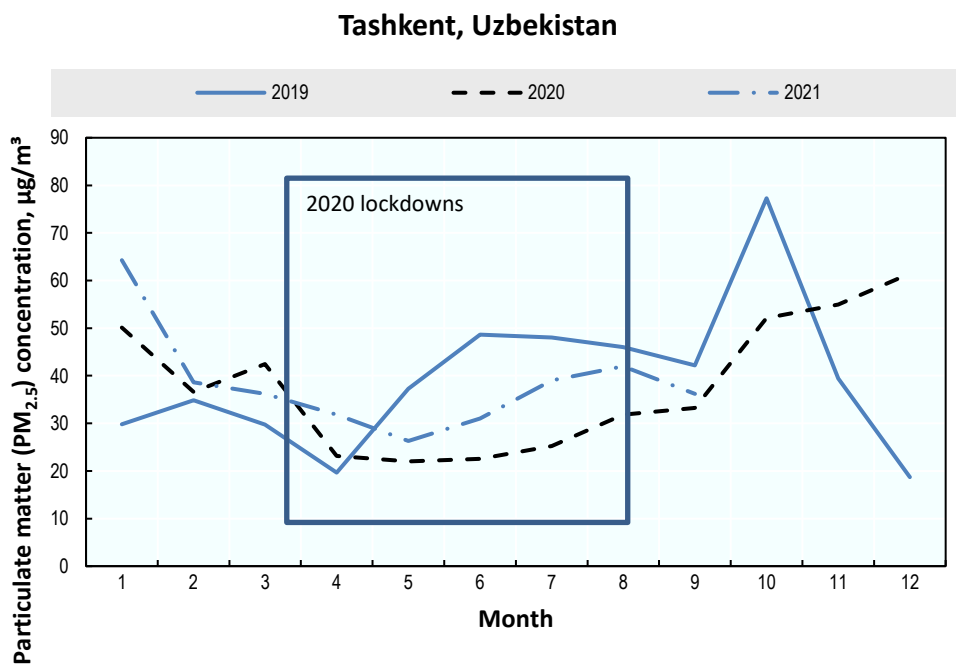
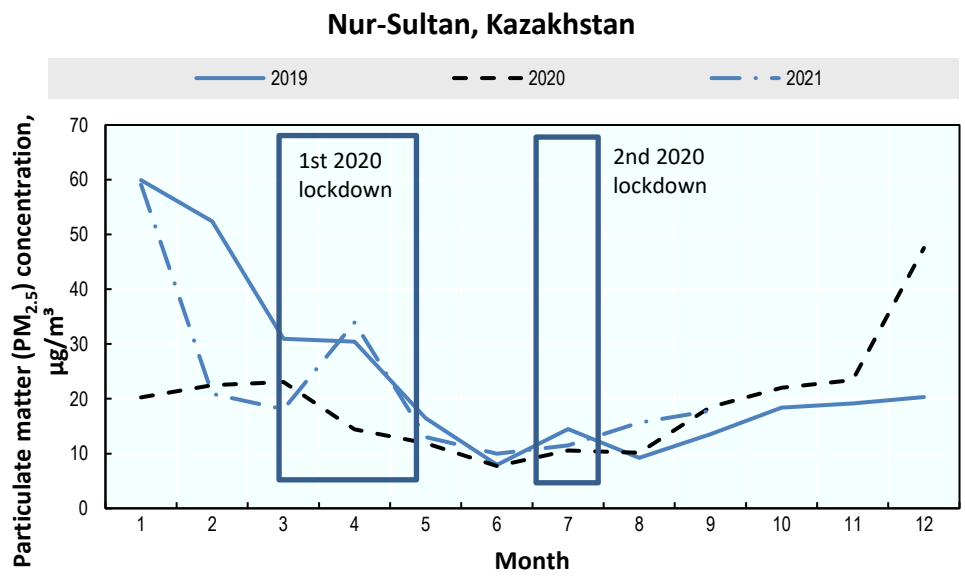
the difficulty of identifying actual expenditure versus planned spending. Where available, the data records expenditure progress against spending.

While research for this paper spent best efforts to track projects to help countries respond to or recover from the crisis, it was not possible to capture all measures that were put in place. It is likely that the paper captured the majority of COVID-19 specific projects with development partners. When it comes to the national budgetary response, however, the database could underrepresent the wide range of measures that countries have put in place to tackle the socio-economic consequences of the pandemic. Often this was because monetary values allocated for these measures were missing. The data does capture, however, the large budgetary envelopes of immediate rescue plans in early 2020 in Georgia and Uzbekistan, for example. Since the data collection strategy also included an emphasis on COVID-19 related measures with a possible impact on the environment, clean, dirty or mixed projects might be overrepresented.

Short-term positive impacts on the environment from the economic slowdown reversed quickly as the economic situation improved

In 2020, during the first few waves of the pandemic, many urban areas in EECCA countries experienced a temporary improvement in air quality. The reduction resulted from decreased traffic caused by restrictions on mobility (including transport of goods and people) and reduced activity of polluting industries (e.g. coal-fired power plants, industrial processes). During national and subnational lockdowns in the first and second quarters of 2020, the concentrations of particulate matter (PM_{2.5}) detected in some major EECCA urban areas decreased dramatically (-18% in Nur-Sultan, Kazakhstan; -28% in Tashkent, Uzbekistan), while the effect was more muted in other major EECCA cities (e.g. Kyiv, Ukraine) (Rodríguez-Urrego and Rodrigo-Urrego, 2020^[14]). These positive effects were short-lived, however, since the trends in PM_{2.5} concentrations have already returned to or nearly returned to their pre-pandemic levels in these cities (Figure 6).

Figure 6. Air pollution in selected major cities in Central Asia (2019-2021)

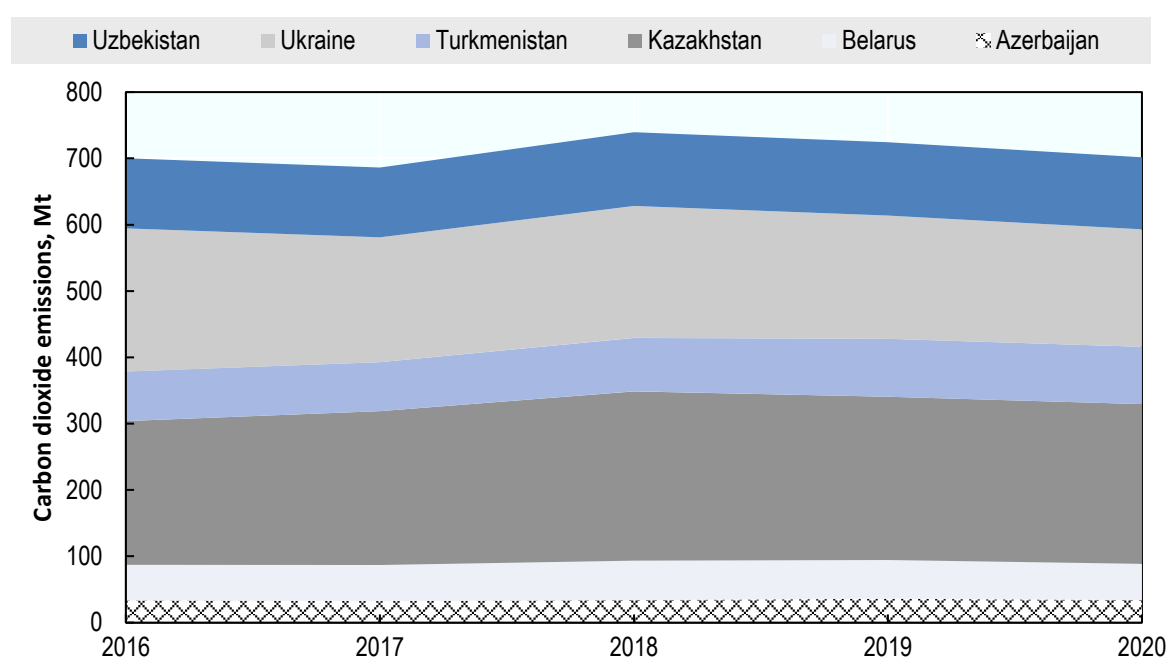


Note: Values are average NowCast concentrations based on hourly measurements.
 Source: Authors' elaboration based on AirNow US Department of State (2021^[15]), US Embassies and Consulates: Air Quality Monitoring, <https://www.airnow.gov/international/us-embassies-and-consulates/>

On a global scale, a similarly rapid rebound effect is expected to take place with greenhouse gas emissions. The IEA estimates that energy-related CO₂ emissions fell by 5.8% in 2020, from 33.4 Gt to 31.5 Gt, which is the largest ever single-year decline. Over the course of 2021, energy-related emissions are expected to bounce back to near their pre-pandemic levels (33.0 Gt) (IEA, 2021^[16]). Energy-related CO₂ emissions in most EECCA countries declined more modestly; the combined emissions of the top six largest

emitters declined by -3% between 2019 and 2020, with Turkmenistan's emissions falling by -1%; Kazakhstan's and Uzbekistan's both falling by -2%; Ukraine's by -4%; Azerbaijan's by -5% and Belarus's by -7% (Figure 7). It is likely that emissions in EECCA countries will bounce back quickly as economic activity returns to pre-pandemic levels. The swift return of elevated greenhouse gas emissions and air pollution concerns after the pandemic's temporary reprieve highlights the importance of continuing to raise ambition on environmental objectives and prepare for slower-moving but potentially more destructive shocks like climate change.

Figure 7. Energy-related carbon emissions in selected EECCA countries (2016-2020)



Note: Only emissions from the combustion of oil, gas and coal for combustion-related activities and natural gas flaring.

Source: Authors' elaboration based on BP (2021^[17]), Statistical Review of World Energy 2021, <https://www.bp.com/content/dam/bp/business-sites/en/global/corporate/pdfs/energy-economics/statistical-review/bp-stats-review-2021-full-report.pdf>

Several EECCA countries are ratcheting up their ambition on climate change and other environmental policy questions

Despite competing priorities, many EECCA countries have continued advancing the green economy agenda, including through updates to their Nationally Determined Contributions (NDCs) under the Paris Agreement in 2020 and 2021. Most countries with fully developed updates have raised the level of ambition of their mitigation and adaptation targets. A third of EECCA countries, including three of the largest economies in the region, have also committed to net-zero targets and have developed or begun developing long-term low-emission development strategies (LT-LEDS), and most have begun the process of formulating National Adaptation Plans (NAPs) (Table 1).

Table 1. Status of NDC updates, net-zero targets and NAPs in EECCA countries

Country	Updated NDC status	Increased ambition in updated NDC?	Net-zero target? (sectors, year)	LT-LEDS?	Measures to formulate and implement NAP?

Armenia	Update drafted, approved and submitted to the UNFCCC	Yes (set 2030 target, maintained 2050 target)	Yes (economy-wide, 2050)	No	12
Azerbaijan	Under development	Unclear	No	No	3
Belarus	Second NDC under discussion	Unclear	No	No	0
Georgia	Update drafted, approved and submitted to the UNFCCC	Yes	No	Nearing finalisation	1
Kazakhstan	Update drafted and under review	No	Yes (economy-wide, 2060)	Under development	1
Kyrgyzstan	Update drafted and approved by the government	Yes	No	No	3
Moldova	Update drafted, approved and submitted to the UNFCCC	Yes	No	No	9
Tajikistan	Update under development	Unclear	No	No	3
Turkmenistan	Update under development	Unclear	No	No	2
Ukraine	Update drafted, approved and submitted to the UNFCCC	Yes	Yes (economy-wide, 2060)	Yes (2018)	0
Uzbekistan	Under development	Unclear	Yes (energy, 2050)	Under discussion	3

Note: The UNFCCC's annual summary of progress on NAPs tracks 23 measures in the process of formulating and implementing a NAP.
Source: Compiled by the authors based on material below.

In the context of the COVID-19 pandemic and ensuing economic downturn, EECCA countries have also revised or replaced strategic planning documents, although the links to the COVID-19 pandemic are less explicit than in the measures analysed above (see How green is the recovery so far in the EECCA region?). The short profiles in Annex A: Country profiles summarise national processes under the UNFCCC and changes, both enacted and proposed, to existing strategies as well as new strategies aimed at supporting the economic recovery. Where possible, the focus of these profiles is on the plausible environmental impacts of these changes.

How to ensure a green recovery with limited resources

The COVID-19 pandemic has posed huge challenges for developed countries. For developing countries, the challenges are far greater and risk lasting longer into the future. The pandemic has exposed gaps in social security and social policies, health infrastructure and digital access in many EECCA countries. It has also shone a light on the differences in fiscal space that impact how countries can react to shocks. Faced with the urgency and unpredictability of the COVID-19 crisis, policy makers may have insufficient time and resources to identify all synergies and evaluate rescue measures. Even in such circumstances, adherence to a set of simple principles can help minimise long-term environmental damage of short-term rescue measures. Figure 8 below provides a schematic to conceptualise the phases of the COVID-19 crisis and helps identify opportunities for greening policy responses.

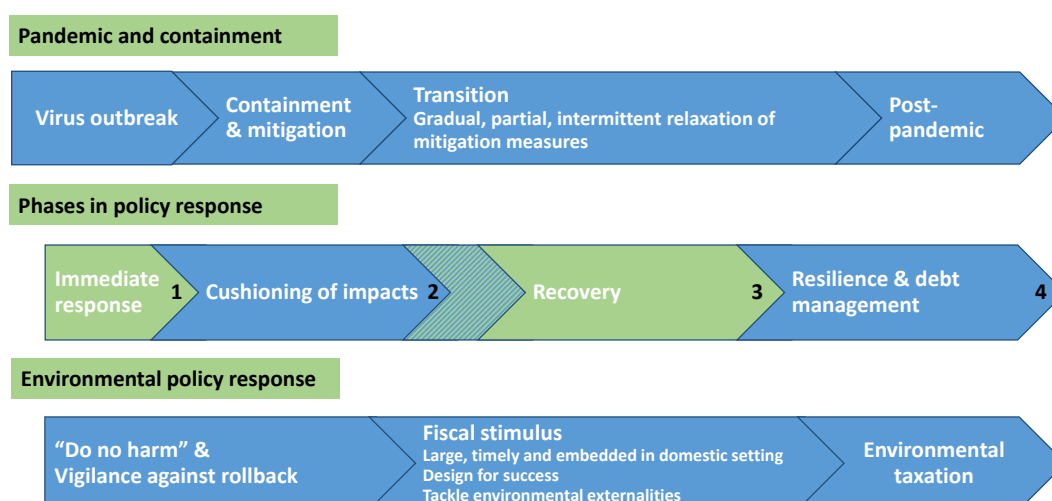
Although green measures tend to become more relevant as part of stimulus measures in Phase 3 (Recovery), and public health and social considerations justifiably dominate Phases 1 and 2, one environmental priority during these two phases could be to “do no harm” (Agrawala, Dussaux and Monti, 2020_[18]). This could include: (i) vigilance with regard to any rollback of environmental standards; (ii) ensuring that any scale-back or suspension of environmental management activities that has resulted from confinement measures is temporary (Agrawala, Dussaux and Monti, 2020_[18]). For example, in the case of moratoria on environmental inspections by state regulatory authorities, ensuring that any suspension is time-bound, that affected entities are better informed about environmental and technical safety and

handling hazardous materials, and that these activities are included among the priority sectors that are re-opened when containment measures ease.

EECCA countries responded strongly to protect lives and livelihoods, and development partners mobilised financial packages quickly in Phases 1 and 2. Nevertheless, countries will continue to feel the fallout from the pandemic. At the same time, governments need to maintain support to people and businesses hit hard by the pandemic and target in particular young people, low-skilled workers and other vulnerable groups with support, education and training to get jobs (OECD, 2021^[19]). A strong recovery also depends on more public investment for the future: in health, digital and energy infrastructure (OECD, 2021^[19]). This raises questions on the sustainability of existing and accumulating debt, especially in the Republic of Moldova, Kyrgyz Republic, Tajikistan and to some extent Ukraine.

Once countries enter the ‘recovery’ phase, they should consider whether and how environmental taxes and pricing of externalities can help create appropriate price signals as well as contribute to the reinvigorated public finances (Agrawala, Dussaux and Monti, 2020^[18]).

Figure 8 Phases of policy response during and after the COVID-19 pandemic



Source: OECD (2020^[20]), *Tax and Fiscal Policy Response to the Coronavirus Crisis: Strengthening Confidence and Resilience*, OECD Policy Responses to Coronavirus (COVID-19), <https://www.oecd.org/ctp/tax-policy/tax-and-fiscal-policy-in-response-to-the-coronavirus-crisis-strengthening-confidence-and-resilience.htm>

The best way to target green recovery spending will become a question for general green fiscal policy and budgeting. Moreover, the need to build a more resilient and inclusive economy while also addressing climate and environmental goals calls for fundamental structural reforms and better policy coherence. Further work under the GREEN Action Task Force could address some of these reform priorities, such as carbon pricing, environmental tax and expenditure reviews, measures to support a just transition for workers and regions, development of institutional capacity for policy coherence, etc. More ambitious action on climate change may necessitate specialised support, retraining or relocation programmes for workers in industries that are incompatible with the green transition; the ‘just transition’ should be a key component of any holistic recovery plan aligned with the Paris Agreement (OECD, 2021^[11]).

The analysis in this paper has shown that EECCA countries are continuing to develop their national green growth strategies and associated policies. It has also shown that opportunities from green innovation,

reskilling and retraining to address both unemployment from COVID-19 and structural shifts from decarbonisation, and investments into energy efficiency are currently underutilised.

Countries can build on concrete results from green response and recovery measures that are already in place and scale these up. Short-term gains can unlock bigger opportunities. As economic growth returns, countries can put in place measures that will achieve longer-term impact for people, businesses and the environment. A green and inclusive recovery has the potential to create opportunities for income, growth and quality jobs, and at the same time accelerate action on medium and longer term environmental goals, both national and global (OECD, 2021^[21]). Such a recovery will also enhance the resilience of economies and societies in the face of accelerating environmental challenges that may come on top of existing stressors.

Box 2. Questions for discussion and suggestions for review

1. What have been the main barriers to including more green measures in recovery packages?
2. What role could international partners such as the OECD play in overcoming these barriers?
3. What are the priority areas for further reform in your country to 'build back better' towards a greener, more resilient and inclusive economy? How could further analysis from the GREEN Action Task Force support these reforms?
4. Economic, environmental and social policy objectives are often perceived as in competition with one another. What barriers are preventing efforts to tackle objectives holistically? What support would be most helpful to countries in this regards? How can unavoidable trade-offs between different objectives be mitigated?

Country delegates are invited to review the country information in Annex A: Country profiles to verify and update the collected information.

Annex A: Country profiles

Armenia

Armenia's updated NDC (submitted in May 2021) sets a new mitigation target of reducing greenhouse gas emissions by 40% compared to 1990 levels by 2030 and aims to double the share of renewables in energy generation by 2030. The updated NDC maintains the 2050 net-zero greenhouse gas emissions objective from the country's first NDC. Armenia receives support from the NDC Partnership under the Climate Action Enhancement Package. The development of a long-term low-emission development strategy is envisioned under the EU4Climate initiative.

Both versions included an adaptation component. To advance on the adaptation agenda, Armenia has undertaken 12 of the 23 measures in the process of formulating and implementing a National Adaptation Plan (NAP) (UNFCCC, 2020^[22]). During the pandemic, Armenia approved its NAP and a list of measures for 2021-2025.

As part of its 21 state support programmes adopted as a response to the COVID-19 pandemic, Armenia launched an afforestation project to plant willow seedlings in riparian areas, improving climate change resilience and boosting employment with seasonal tree-planting jobs. Through the NDC Partnership, an advisor on greening COVID-19 recovery measures will be stationed in the country's Ministry of Economy for a 12 month period (EU4Environment, 2021^[23]).

In August 2021, Armenia unveiled its new Government Programme for 2021-2026, developed in the context of the COVID-19 pandemic. The Program lays out priorities on six policy areas, including infrastructure development and the economy. Many of the proposed infrastructure projects, including highways and other roads, are in line with a business-as-usual mode of development, whereas the economic component focused primarily on raising the minimum wage, reducing poverty and eliminating extreme poverty.

Azerbaijan

Azerbaijan's first NDC sets an emissions reduction target of 35% below 1990 levels by 2030. With support from UNDP under the EU4Climate initiative, an updated NDC is currently under discussion. Azerbaijan has also undertaken 3 out of 23 measures in the process of formulating and implementing a National Adaptation Plan (NAP) (UNFCCC, 2020^[22]).

Azerbaijan's Action Plan for the post-COVID period includes a few green measures, including a short-term employment programme dedicated to creating urban green spaces and improvements to solid waste management (EU4Environment, 2021^[24]). Azerbaijan has continued to advance the green agenda in parallel. It published an in-depth review of energy efficiency policy, and draft national action plans are under development to improve energy efficiency and renewable energy uptake.

In the context of the pandemic, Azerbaijan also adopted a new top-level economic development strategy in early 2021, Azerbaijan 2030: National Priorities for Socio-Economic Development, and is preparing a draft medium-term strategy covering 2021-2025 (Government of Azerbaijan, 2021^[25]). Azerbaijan 2030 sets out economic diversification away from hydrocarbons as its first priority. It also calls for the expansion of green spaces across the country and accelerated integration of renewable energy sources into the national energy mix. UNIDO, under the EU4Environment initiative, plans to ramp up engagement with Azerbaijan on resource efficient and cleaner production (RECP) as a response to Azerbaijan 2030 (EU4Environment, 2021^[26]).

Belarus

Being the only country in the EaP region that did not embrace strict lockdown measures, Belarus adopted several measures to mitigate socio-economic ramifications of the pandemic. Some of these measures seek to support environmental objectives; in the course of 2020, together with the World Bank, the government of Belarus decided to revamp forestry projects in reaction to COVID-19 in order to create more green jobs. In December 2020, the country's National Assembly discussed the Sustainable Development Strategy to 2035, which will align with and foster implementation of the 2030 Agenda for Sustainable Development. Belarus's first NDC aims to reduce greenhouse gas emissions by at least 28 percent from the level in 1990 by 2030; its second NDC is under development. The country does not have a net-zero target, nor has it begun to develop a National Adaptation Plan.

Given the relative lack of local energy sources and reliance on imports, Belarus might be able to expand its domestic energy supply and boost energy security through increased deployment of renewable energy technologies. Apart from directly reducing emissions, higher renewable energy deployment could help local value creation including employment opportunities and contribute to the green transition. With the considerable share of investment having been facilitated via international capital, the local financing sector is not very experienced in green financing. According to the International Renewable Energy Agency the equity and debt financing for renewable energy projects in Belarus is scant (IRENA, 2021^[27]). Therefore, clear financial sector policies including fostering small-scale financing should be developed and green financing within the sector prioritised.

Since the energy productivity of Belarus stands well below the EU levels, there is a scope for improvement in terms of reduction of emissions, energy efficiency and energy processes. This will be essential for the industrial sector that accounts for 36% of the final energy consumption (IRENA, 2021^[27]) which accounts for a significantly higher share than in the EU (25.5%) (European Environment Agency, 2021^[28]). The well-developed nature of Belarusian industrial sector places a substantial pressure on the environment. Thus, the key environmental priorities of the country are to reduce industrial and municipal waste as well as decrease water and air pollution especially from industrial sources. With the country's industry accounting for 37% of GDP and about one third of employment, more resource-efficient attitude would make the economy of Belarus more competitive (EU4Environment, 2020^[29]).

Georgia

Released in February 2021, the Georgian government's "Programme for 2021 – 2024 Towards Building a European State" identifies environmental protection, sustainability and rational use of natural resources as priorities to be addressed. Concrete actions laid out in the Programme include a separate waste collection system nationwide along with furthering waste recycling, expansion of water and ambient air quality monitoring, extension of the protected areas and creation of ecotourism infrastructure. It also aims to continuing approximation of environmental standards with EU requirements as well as to raise environmental awareness, including through the promotion of environmental education. Within the scope of the Unified Rural Development Policy, the governmental program also foresees perpetuation and boost of greenhouse co-financing measures along with the promotion of the sustainable development of aquaculture in inland and marine waters.

In 2021, Georgia updated its NDC and committed itself to an unconditional target of reducing emissions by 35 % below their 1990 level by 2030 as well as a conditional target of 50-57%. Given that 43.5% of the country's territory is covered by forests, the updated NDC also targets maintaining and increasing the GHG absorption capacities of the forests by 10% compared to 2015. The updated NDC also sets a target of reducing emissions from the transport sector by 15% (Government of Georgia, 2021^[30]). Georgia receives support from the NDC Partnership under the Climate Action Enhancement Package.

Georgia's 2030 Climate Strategy, developed over the course of 2020 and adopted in 2021, also aims to reduce demand for fossil fuels in the transport sector through the promotion of environmentally friendly fuels, including biofuels. It aims to increase the proportion of fuels from renewable sources in total fuel consumption in the transport sector to 10% by 2030. To support the Climate Strategy's goal of increasing the share of renewables in Georgia's power generation mix, 130 Memoranda of Understanding have been signed. The Strategy also foresees the development of data-based waste management system along with the improvement in the systematic methodology of the existing waste management database.

The Ministry of Environment and Natural Resources released its vision for Environmental Protection and Rural Development 2030, which emphasises the importance of decreasing the water, air and soil pollution, coupled with the expansion and management of protected territories.

Kazakhstan

In late 2020, Kazakhstan pledged to achieve carbon neutrality by 2060. The development of a long-term low-emission development strategy in line with this objective and a new 'Doctrine' is nearly completed with support from GIZ and UNDP (International Climate Initiative, 2021^[31]). Kazakhstan has also drafted an update to its first NDC, which is currently under review and awaiting approval. In the current draft, Kazakhstan's emissions reduction targets remain identical to those in its original 2016 NDC: an unconditional target to decrease emissions by 15% below 1990 levels by 2030, or by 25% conditional on international support (Government of Kazakhstan, 2021^[32]). Kazakhstan has also undertaken 1 of the 23 measures in the process of formulating and implementing a National Adaptation Plan (NAP) (UNFCCC, 2020^[22]).

In May 2020, Kazakhstan adopted a Comprehensive Plan for Revitalising Growth by the end of 2020, later revised to the end of 2021. The Plan contains no identifiably 'green' measures, focusing predominantly on shoring up macroeconomic stability and supporting small businesses and the agricultural sector, but a handful of measures could potentially have negative environmental consequences. For instance, fossil fuel producers have been given temporary rights to flare gas in cases where oil wells are not sufficiently equipped with infrastructure to extract the gas for future use, provided that cuts are not made to jobs or social benefits. While this social conditionality is desirable and gas flaring (releasing CO₂) is preferable to venting (releasing methane), without additional environmental safeguards the measure's impact could be negative. Another measure, which recognises cryptocurrency mining as an entrepreneurial activity and aims to make Kazakhstan a hub for the industry, could also be potentially harmful given the energy-intensive nature of cryptocurrency mining and the predominance of fossil fuels in Kazakhstan's current energy mix (Government of Kazakhstan, 2021^[33]).

Implementation of pre-pandemic green economy and economic development strategies (Concept for the Transition to a Green Economy, Kazakhstan-2030 and Kazakhstan-2050) has continued at pace during the pandemic. For instance, in July 2020, a new action plan covering 2021-2030 was adopted to guide the implementation of the Concept for the Transition to a Green Economy. It includes measures supporting energy efficiency, uptake of gas- and electric-powered vehicles, the transition from coal to gas in the power supply of major cities (i.e. Almaty, Nur-Sultan, Shymkent), improved waste management and the preservation of natural capital (Government of Kazakhstan, 2021^[34]).

Kyrgyzstan

Kyrgyzstan submitted its first NDC to the UNFCCC in 2020, and an updated NDC was adopted following interagency consultations in late 2021 for submission to the UNFCCC at COP26. The updated NDC sets accelerated mitigation targets (16.63% unconditional and 36.61% conditional targets by 2025 in the updated NDC compared to 12.67-15.67% unconditional and 35.06-36.75% conditional targets by 2050 in the original). It also highlights the adoption of a low-carbon development strategy and a National Adaptation

Plan (NAP) as key next steps in Kyrgyzstan's climate change efforts (UNDP, 2021^[35]). Kyrgyzstan has undertaken 3 of the 23 measures in the process of formulating and implementing a NAP (UNFCCC, 2020^[22]). Kyrgyzstan receives support from the NDC Partnership under the Climate Action Enhancement Package.

The government is finalising a draft Programme on Combating Coronavirus Infection for 2021-2023, combining emergency response measures and longer-term recovery initiatives. The interdepartmental meetings leading to its development did not include representatives of the government's environmental body, the State Ecology and Climate Committee. Most of the measures under consideration focus on the immediate health impacts of the COVID-19 pandemic and supporting vulnerable populations, small businesses and the agriculture sector. A small number of measures could have positive environmental co-benefits, notably the installation of drip irrigation systems in agricultural areas and a commitment to gradually reduce cross-financing and energy subsidies. The draft Programme also identifies priority infrastructure projects in various sectors: energy (e.g. rehabilitation of existing hydroelectric power plants, constructions of small hydro power plants and transmission infrastructure), transport (e.g. modernisation and expansion of airports, including Bishkek's Manas International Airport, and the construction of several highways) and water supply and sanitation. With the exception of much-needed water supply and sanitation infrastructure and refurbishments of existing assets, these investment projects largely align with business-as-usual development, and the lack of energy diversification could further entrench pre-existing problems with the seasonality of Kyrgyzstan's hydro-dominated energy mix.

Kyrgyzstan is developing its medium-term development strategy for 2021-2026, with recovery from the COVID-19 crisis as one of its primary objectives. One of the country's goals is to reduce reliance on fossil fuels, notably the capital Bishkek's coal-fired combined heat and power plant, by further developing its hydroelectric generation capacity as well as decentralising and electrifying heat generation. Following development of international transmission lines, Kyrgyzstan aims to export electricity to Afghanistan and Pakistan via Tajikistan through the CASA-1000 Power Transmission and Trade project as well as to western regions of China. Kyrgyzstan also plans to ensure that all imported fuel complies with the EURO-5 standard by 2022. Government press releases indicate that the document will incorporate the ideas of the National Development Strategy 2018-2040, adopted under the previous administration. The strategy's relation to and alignment with the Green Economy Strategy (2019-2023), also adopted under the previous administration, remains unclear.

Moldova

Moldova submitted its revised NDC in March 2020, which raised its initial 64-67% unconditional mitigation target to 70% (both compared to 1990 levels by 2030). Its conditional target also increased from 78% to 88%. On the adaptation agenda, Moldova published a Readiness and Preparatory Support report in 2020 with the support of the UNDP as a part of the National Adaptation Planning (NAP) process. The NAP-2 cycle is designed to help the Moldovan government continue to enhance its capacity to address the country's long-term vulnerabilities to climate change in its national priority sectors, with specific focus laid on the agriculture sector. Moldova has undertaken 9 of the 23 measures in the process of formulating and implementing a NAP (UNFCCC, 2020^[22]).

Approved by the government of Moldova in June 2020, the National Development Strategy "Moldova 2030" includes the promotion of environmental objectives. Its environmental objectives include the promotion of green and circular economy, achieving related environmental Sustainable Development Goals and ensuring a fundamental right to health and a safe environment. The strategy was presented to parliament for adoption.

Expected to be approved in the beginning of 2022, the new National Strategy for Agricultural and Rural Development 2021-2030 is being finalised by the Ministry of Agriculture, Regional Development and Environment. The priorities mentioned in the strategy include: ensuring environmental protection through

agri-environmental schemes, conservation of ecosystems and biodiversity, climate change mitigation, food quality protection and health as well as fostering generational renewal. The adaptation of agricultural producers to climate change is also mentioned as an important objective. In June 2020, a National Greening Programme for SMEs was launched in Moldova by ODIMM (Organisation for Small and Medium Enterprises Sector Development) with the support of EU4Environment. This grants economic incentives to boost SMEs to sustain green actions, lends financial and methodological support to businesses to ameliorate their knowledge and skills associated with efficient use of resources.

Tajikistan

Tajikistan submitted its first NDC in 2017, setting an unconditional target of reducing greenhouse gas emissions by 10-20% compared to 1990 levels by 2030, or up to 25-35% conditional on international support. Since 2019, Tajikistan has received support from the NDC Partnership under the Climate Action Enhancement Package and an updated NDC is under development. Tajikistan has undertaken 3 of the 23 measures in the process of formulating and implementing a National Adaptation Plan (NAP) (UNFCCC, 2020^[22]).

As part of its continued implementation of its top-level national development strategy, National Development Strategy 2030, Tajikistan developed and adopted a new Medium-Term Development Strategy (2021-2025), the consultations for which took place during the COVID-19 pandemic.

Tajikistan has not adopted a post-pandemic economic recovery strategy, but a green economy strategy is under development to guide the implementation of green economy principles in Tajikistan.

Turkmenistan

Turkmenistan's first NDC sets an unconditional target of reducing the greenhouse gas emissions intensity of the economy and a conditional target of plateauing emissions at their current levels. Initial discussions about updating the NDC and preparing the country's fourth National Communication to the UNFCCC began in early 2021 (United Nations in Turkmenistan, 2021^[36]). In parallel, Turkmenistan has undertaken 2 of the 23 measures in the process of formulating and implementing a National Adaptation Plan (NAP) (UNFCCC, 2020^[22]).

Turkmenistan has not adopted a post-pandemic economic recovery strategy or adopted green growth-related strategies. In 2020, it adopted the Kigali amendment to the Montreal Protocol and passed a new law on renewable energy. Further legislation on energy efficiency and savings is being drafted.

Ukraine

Ukraine submitted its updated NDC in July 2021 with the goal of reducing greenhouse gas emissions to 35% by 2030 compared to 1990 levels and declaring its ambition to attain climate neutrality by no later than 2060. The key provisions to achieve its 2030 objective include the development of renewable energy sources, energy efficiency measures in all sectors of the economy, introduction of a waste management hierarchy, modernisation of industrial and energy enterprises, improved insulation and heating of buildings and expanded forest cover along with a reformed forest management system.

The Ukrainian government has started the process of developing an Action Plan for the implementation of the updated NDC. The just and green transition of coal-producing regions away from reliance on the coal industry towards a carbon-neutral economy pose a particular challenge for Ukraine. The Initiative for Coal Regions in Transition in the Western Balkans and Ukraine, a joint programme of the European Commission

and several international partners,³ aims to help coal-dependent countries and regions, including the Donetsk, Luhansk, Lviv and Volyn regions of Ukraine, decarbonise their economies. To this end, in July 2021, the government of Ukraine launched a programme of the just transition of coal regions and announced that the Ukrainian Climate Fund would be established under the Ministry of Ecology and Natural Resources to fund the necessary measures. In September 2021, the creation of a Platform on Sustainable Finance for Green Transition was also announced. It aims to act as a forum for expediting and coordinating efforts on green financing in Ukraine between IFIs, government bodies, businesses and donors.

As part of its State Programme on Economic Stimulus Activities planned for 2020-2022 in response to the COVID-19 pandemic Ukraine emphasised the development of waste management and water supply and sanitation systems. In 2020, the Ministry of Environmental Protection and Resources was re-established as a separate ministry, reversing the merger with the Ministry of Energy under the previous administration. The Ministry adopted an ambitious work plan including industrial pollution reduction, waste management, biodiversity preservation, stronger action on climate change and reform of forestry, fisheries and water resource management (EU4Environment, 2021^[37]).

Ukraine adopted a new top-level strategic planning document during the pandemic. In March 2021 the Cabinet of Ministers of Ukraine approved the National Economic Strategy until 2030 with the following expected outcomes: strengthened competitiveness of industrial products produced in Ukraine, the introduction of resource- and energy-efficient technologies and better quality and safety of the environment. The Strategy also highlights a particular need to improve public policy in the field of environmental management and protection, nature management, adaptation to climate change and the transition to the principles of green economy. With the first meeting of the Climate Change Adaptation Working Group having been held in November 2020, Ukraine launched the process of development of the National Adaptation Strategy until 2030 (UNDP, 2020^[38]).

On 24 January 2020, Government of Ukraine set up an inter-institutional group for coordination the climate change effects under the framework of the European Green Deal, chaired by the Prime Minister of Ukraine (Mission of Ukraine to the European Union, 2021^[39]). As a central element of the European Green Deal, the implementation by the EU of the carbon adjustment mechanism (CBAM) is scheduled for 2023. It is recognised that CBAM could limit carbon leakage, but due to the high carbon intensity of Ukraine's steel and iron production and considering that the EU is the key export destination for these commodities, Ukraine may face greater barriers as a result of the CBAM implementation. The country has weak carbon pricing instruments in place at the moment, but is making efforts to strengthen them. The discussions on how the CBAM could be introduced could also be an opportunity for Ukraine to align its climate policy more quickly with that of the EU and could be an incentive for its carbon-intensive sectors to modernise and increase efficiency.

Uzbekistan

Uzbekistan submitted its first NDC in 2017 with a mitigation target to decrease greenhouse gas emissions per unit of GDP by 10% by 2030 compared to 2010 levels and an adaptation focus on the Aral Sea. An updated NDC is under development, but it is unclear how its level of its ambition compares to the 2017 NDC. Uzbekistan has also begun the process of formulating and implementing a National Adaptation Plan (NAP), having undertaken 3 of the 23 measures tracked by the UNFCCC (UNFCCC, 2020^[22]).

In early 2021, Uzbekistan set a target to achieve carbon neutrality in its energy sector by 2050. EBRD together with the Ministry of Energy began developing a National Low-Carbon Energy Strategy to guide the country's decarbonisation. In 2020, the government approved the Concept Note for Ensuring Electricity Supply in Uzbekistan in 2020-2030, envisioning an additional 16.4 GW of generating capacity between

³ The World Bank, the Energy Community Secretariat, the European Investment Bank, the European Bank for Reconstruction and Development, the College of Europe in Natolin and Poland's National Fund for Environment Protection and Water Management.

2019 and 2030. While up to 8 GW of new installed capacity will derive from renewable energy sources (3 GW from wind farms and 5 GW from solar farms), the Concept Note also includes the addition of 150 MW of new coal generation capacity (Phase Two of the Angren Thermal Power Plant). The Concept Note also supports the phased modernisation of existing coal-fired generators at the Novo-Angren Thermal Power Plant to reduce emissions. Uzbekistan adopted laws on renewable energy sources and public-partner partnerships as well as updated regulations regarding power generation companies to prepare the legislative framework for better renewable energy integration. In terms of implementation, two pilot projects – 100 MW solar photovoltaic plants in Samarkand and Navoi regions – are under construction through public-private partnership arrangements. The new plants should be commissioned by the end of 2021 (Ministry of Energy of the Republic of Uzbekistan, 2020^[40]).

Uzbekistan is currently developing several green economy-related strategies and analyses with international partners, including the World Bank (a long-term climate strategy, circular economy assessment of the agrifood sector, new Environmental Code, preliminary work on carbon pricing market development), UNECE (Innovation for Sustainable Development Review, review of energy efficiency) and the French development agency AFD (technical assistance on green economy policy). Uzbekistan has a Strategy for the Transition to a Green Economy (approved in 2019), but it currently lacks a roadmap for the implementation of its green economy programme. As such, the country is seeking technical assistance to measure, monitor and evaluate impact of policy measures. Uzbekistan has also set up an Interdepartmental Council for "Green" Economy Promotion and Implementation.

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