# NECP = National Energy and Climate Plan

# Ukraine's energy and climate roadmap by 2030: what it means for foreign investors

The government's single plan aligning energy and climate policy — required under Regulation (EU) 2018/1999, same as for the EU Member States, and an indicator under the Ukraine Facility. Updated version approved by CMU Order No. 562-r of 10 June 2026.

## Five problems investors raise — and how the NECP addresses them

in place · law · planned · pilot

| INVESTOR PROBLEM | WHAT THE NECP PROVIDES | WHAT TO TRACK |
|---|---|---|
| **01 War risk**<br>Assets at risk; insurance and finance scarce | planned — RAMP-UP price stabilisation and de-risking initiative by the EBRD and World Bank Group (launch expected by end-2026)<br>pilot — Donor-funded de-risking for winners of Ukrenergo's long-term ancillary-services auctions | First auction under the mechanism |
| **02 Getting paid**<br>Legacy arrears to RES producers under FiT | in place — 2026 transmission tariff raised 29.8% y-o-y to fund FiT payments; settlements by the Guaranteed Buyer have improved | Guaranteed Buyer payment rates |
| **03 Price caps**<br>Administrative caps blunt price signals | law — Wholesale electricity price caps to be lifted from 1 May 2027 (Law No. 4834-IX)<br>planned — Day-ahead and intraday market coupling with the EU (2024–2029); balancing market integration | Cap lifting on 1 May 2027; coupling timetable |
| **04 Bankable revenue**<br>Long-term offtake beyond merchant risk | in place — Ancillary-services auctions with euro-indexed prices (contracts to 2030–31); RES auctions with market premium; corporate PPAs<br>planned — RAMP UP: contracts-for-difference tenders, 1–1.5 GW first, 10 GW by 2040<br>planned — EU recognition of Ukrainian guarantees of origin (Energy Community decision expected end-2026) | First CfD tender; GoO decision at end-2026 |
| **05 Cross-border access**<br>Moving power and gas in and out | in place — Allowed commercial exports from Continental Europe to the UA/MD block up to 2,450 MW, imports up to 900 MW<br>in place — Gas storage under customs-warehouse regime, short-haul and bundled capacity (Vertical Corridor)<br>planned — Gas exports: restricted, limited volumes allowed since 2026; full opening scheduled post-war or subject to SoS assessment | Further ENTSO-E capacity increases; gas exports liberalisation |

## Who should care?

| | relevance |
|---|---|
| Renewables, storage and flexibility developers | ■■■ |
| Traders and utilities in neighbouring EU markets | ■■■ |
| Equipment, EPC and grid-technology suppliers | ■■■ |
| Gas traders using Ukrainian storage | ■■□ |
| EU buyers of Ukrainian steel, fertiliser and other CBAM goods | ■■□ |

## Reading the plan

- **A plan, not a law.** Guarantees and obligations come from separate laws and regulations.
- **Price guarantees:** RES support-quota auctions (340–400 MW/yr to 2029) and new-generation tenders (~1.3 GW planned for 2026).
- **Status varies by measure:** check the monitoring before you price it in (next page).

The market, monitoring and milestones — next page →

# The market in 2030 — and how to track delivery

## Renewables: capacity to grow ~2.6×

RES capacity 2026 — ~9.3 GW

RES capacity 2030 — ~24 GW

wind 42% | solar 28% | other 30%

RES generation mix in 2030. Over €12bn already invested in Ukrainian renewables; up to €20bn of private investment expected by 2030.

## Price guarantees: auctions & tenders, MW

| | |
|---|---|
| RES support quota · 2026 | 340 |
| RES support quota · 2029 (indicative) | 400 |
| New flexible generation · awarded 2025 | 316 |
| New generation tender · planned 2026 | ~1,300 |

July 2025 wind auction: 120 MW at €0.0796/kWh. Tender winners get capacity payments for 10+ years.

**27%** minimum RES share in final energy consumption

**33%** max. imports in total primary energy supply

**30%** max. share of any single supplier (except nuclear)

**+€160bn** extra investment needs under additional policies scenario

## NEW Delivery can now be tracked

### OFFICIAL MONITORING

The Ministry of Economy runs an online NECP monitoring platform, updated monthly; part of the data is public.

**For investors:** tells you which measures are moving and which remain on paper.

dashboard

### INDEPENDENT CIVIL-SOCIETY MONITORING

| | |
|---|---|
| at start | 48% |
| after 2 years | 59% |

Integrated implementation score (DiXi Group, September 2026). Only ~7% of measures are blocked by the war; almost half can be delivered regardless of the war developments.

## Openings beyond onshore power

**Offshore wind** — planned
~50 GW potential (World Bank / DTU); legal framework in preparation

**Biomethane** — in place
Target up to 1 bcm/yr by 2030; EU exports enabled by law (2024)

**Joint projects** — planned
Statistical transfers and joint RES projects with EU states (draft law)

**Hydrogen & CCUS** — planned
Potential studies; EU hydrogen and gas decarbonisation package to be transposed

## Milestones to follow

● done ○ scheduled / target

| Jun 2026 | End 2026 | 1 May 2027 | 2028 | End 2029 | 2030 | 2035 |
|---|---|---|---|---|---|---|
| Updated NECP approved | GoO recognition decision | Wholesale price caps lifted | Pilot emissions trading* | EU-UA electricity market coupling | NECP targets | Coal power phase-out |

* Full emissions trading starts no earlier than three years after martial law is lifted.

UK International Development — Partnership | Progress | Prosperity
dixigroup

Prepared by NGO DiXi Group under the project "Implementation of the Ukraine National Energy and Climate Plan and establishment of the Green Transition Office", funded by UK International Development. Views are the authors' own and do not necessarily reflect UK government policy.



Sources: Ukraine NECP to 2030 (CMU Order No. 562-r, 10 June 2026); DiXi Group independent NECP monitoring (2026)