



IQTISODIYOT & TARAQQIYOT

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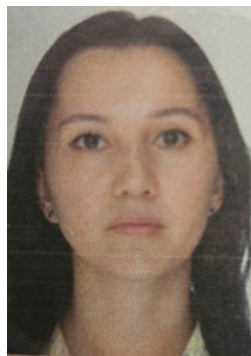
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THE STATE AND SUSTAINABLE DEVELOPMENT PROSPECTS OF THE ELECTRIC POWER SYSTEM IN UZBEKISTAN



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Abstract: The article analyzes recent institutional reforms in Uzbekistan's electric power sector, the current state of power generation and transmission infrastructure, and strategic directions for the development of renewable energy sources. The dynamics of electricity generation volumes and installed capacities of thermal power plants are examined, along with the results of introducing combined cycle gas turbine (CCGT) units and the development maps of solar and wind energy up to 2030, in order to assess the level of diversification of the national energy portfolio. The analysis shows that it is necessary to modernize grid infrastructure, reduce technological losses, and widely implement digital technologies to enhance system efficiency and ensure sustainable development.

Keywords: electric power system, generation, thermal power plants, combined cycle gas turbines, renewable energy, solar power, wind power, transmission networks, sustainable development.

Annotatsiya: Mazkur maqolada O'zbekiston elektr energetikasi sohasida amalga oshirilayotgan so'nggi institutsional islohotlar, elektr energiyasini ishlab chiqarish va uzatish infratuzilmasining joriy holati hamda qayta tiklanuvchi energiya manbalarini rivojlantirishning strategik yo'nalishlari tahlil qilingan. Elektr energiyasi ishlab chiqarish hajmlari va issiqlik elektr stansiyalarining o'rnatilgan quvvatlari dinamikasi, shuningdek, bug'-gaz qurilmalari (CCGT)ni joriy etish natijalari hamda 2030 yilgacha quyosh va shamol energetikasini rivojlantirish xaritalari milliy energetika portfelining diversifikatsiya darajasini baholash maqsadida o'rganilgan. Tahlil natijalari elektr tarmoqlari infratuzilmasini modernizatsiya qilish, texnologik yo'qotishlarni kamaytirish va tizim samaradorligini oshirish hamda barqaror rivojlanishni ta'minlash uchun raqamli texnologiyalarni keng joriy etish zarurligini ko'rsatadi.

Kalit so'zlar: elektr energetikasi tizimi, elektr energiyasi ishlab chiqarish, issiqlik elektr stansiyalari, bug'-gaz qurilmalari, qayta tiklanuvchi energiya, quyosh energetikasi, shamol energetikasi, elektr uzatish tarmoqlari, barqaror rivojlanish.

Аннотация: В статье анализируются последние институциональные реформы в электроэнергетическом секторе Узбекистана, современное состояние инфраструктуры производства и передачи электроэнергии, а также стратегические направления развития возобновляемых источников энергии. Исследуются динамика объемов производства электроэнергии и установленных мощностей тепловых электростанций, результаты внедрения парогазовых установок (ПГУ), а также планы развития солнечной и ветровой энергетики до 2030 года с целью оценки уровня диверсификации национального энергетического портфеля. Результаты анализа показывают необходимость модернизации сетевой инфраструктуры, сокращения технологических потерь и широкого внедрения цифровых технологий для повышения эффективности энергосистемы и обеспечения устойчивого развития.

Ключевые слова: электроэнергетическая система, производство электроэнергии, тепловые электростанции, парогазовые установки, возобновляемая энергия, солнечная энергетика, ветровая энергетика, электрические сети передачи, устойчивое развитие.



INTRODUCTION

The electric power system is one of the key infrastructures ensuring economic growth, industrial production, and social welfare in Uzbekistan. In recent years, a steady increase in electricity demand, the need to modernize regional infrastructure, tightening environmental constraints, and the national strategy for transition to a “green” economy have required profound reforms in the energy sector. From this perspective, it is of both scientific and practical importance to analyze the current state of the national electric power system, assess its institutional structure, and identify prospects for sustainable development.

REVIEW OF LITERATURE ON THE SUBJECT

Foreign and domestic literature on Uzbekistan’s energy sector primarily considers institutional reforms, the gradual increase of electricity generation capacities, the introduction of market mechanisms, and the development of renewable energy sources from various angles [1; 2; 3]. Some studies focus on the liberalization of the electricity market and provide analytical assessments based on official data on the capacities and generation indicators of large thermal power plants, while other works examine in detail the experience of introducing combined cycle gas technologies at the Talimarjan, Navoi, Tashkent and Syrdarya thermal power plants [4; 5; 6; 7]. Concepts and regional maps for the phased development of solar and wind energy up to 2030 are evaluated in terms of increasing the share of renewable energy, diversifying the energy portfolio, and reducing emissions [11; 12; 13]. However, many of these works remain limited to describing individual plants, projects or fuel types; as a result, issues related to a comprehensive assessment of the electric power system as a single whole — including its institutional structure, generation dynamics, renewable energy projects, and grid infrastructure — are insufficiently covered [8; 9; 10]. The originality of this article lies in the fact that it examines the current state of Uzbekistan’s electric power system from the standpoint of sustainable development using an integrated approach. Relying on official data from the Ministry of Energy, Thermal Power Plants JSC, Uzbekistan National Power Grid JSC and renewable energy statistics, the study analyzes the institutional structure, dynamics of thermal generation, solar and wind projects, and existing issues in grid infrastructure in an interconnected manner. On this basis, longterm priority directions aimed at ensuring sustainable and competitive development of the sector are identified [1–13].

RESEARCH METHODOLOGY

To assess the state of Uzbekistan’s electric power system, statistical analysis and comparative methods were employed. Based on official data from the Ministry of Energy, Thermal Power Plants JSC, Uzbekistan National Power Grid JSC and the Statistics Agency, time series were constructed for 2010–2025 covering electricity generation volumes, installed capacities, fuel structure of thermal plants, and the share of renewable energy in the national energy balance. Key capacity and generation indicators of major thermal power plants, as well as the results of introducing CCGT units at the Talimarjan, Navoi, Tashkent and Syrdarya plants, were analyzed using comparative techniques. At the regional level, development maps of solar and wind energy projects up to 2030 were used to assess the spatial distribution and planned capacities of renewable generation, the state of transmission infrastructure, and the level of technological losses. By comparing these indicators within a single framework, short, medium and longterm priorities for diversifying the energy portfolio and modernizing grid infrastructure were determined.

ANALYSIS AND RESULTS

Institutional reforms carried out in Uzbekistan’s electric power sector have led to the formation of a management system differentiated by functional segments. Separate entities now operate at the stages of generation, transmission, distribution and electricity trade, which is aimed at reducing vertical integration, improving management efficiency and creating a competitive environment. Electricity generation is mainly carried out by Thermal Power Plants JSC and modern solar, wind and gasturbine power plants built under publicprivate partnership arrangements. Transmission of electricity via highvoltage backbone networks and maintaining the stability of the unified power system are the responsibility of Uzbekistan National Power Grid JSC, which operates as the national system operator managing 35–110–220–500 kV lines and substations. The main hydroelectric infrastructure is managed by Uzbekhydroenergo JSC, which operates existing hydropower plants and implements new projects. To organize centralized purchasing and wholesale trading of electricity, Uzenergosotish JSC has been established as a wholesale market operator, coordinating economic



relations between generators and distribution companies. Such functional differentiation serves to increase the efficiency of electricity generation, support modernization of the energy infrastructure, attract private investment and ensure longterm sustainable development. The bulk of Uzbekistan's electricity generation is provided by thermal power plants. Thermal Power Plants JSC operates major plants such as Syrdarya, Navoi, Talimarjan, Tashkent, Angren, New Angren, Takhiatash and Turakurgan, which form the backbone of the country's generation capacity. During 2010–2025, the total installed capacity of thermal plants and heating centers increased from about 10.7 GW to around 15.6 GW, while electricity generation rose from 51 billion kWh to more than 86 billion kWh. This growth is associated with largescale modernization, commissioning of new units and introduction of CCGT technologies.

Projects implemented at Talimarjan, Navoi, Turakurgan, Tashkent and Syrdarya using CCGT technology have significantly improved fuel efficiency and provided additional generation volumes. For example, commissioning of 900 MW CCGT units at Talimarjan raised the plant's capacity to 1,700 MW and increased fuel efficiency to about 55–60%; CCGT units at Navoi and Takhiatash have reduced fuel consumption and enabled the production of several billion additional kWh per year.

Fuel type capacity distribution as of 2025 shows that approximately 78–79% of thermal capacity relies on natural gas, while 21–22% depends on coal. This structure reflects a stable natural gas-based generation system and highlights opportunities for further diversification of the energy portfolio, with the existing share of coal providing an additional source to support long-term energy security. (Table 1).

Table 1.
Main thermal power plants in Uzbekistan¹

No.	Power plant	Location	Installed capacity (MW)	Fuel type
1	Syrdarya TPP	Syrdarya region	3,000	Natural gas
2	Navoi TPP	Navoi region	1,250	Natural gas
3	Talimarjan TPP	Kashkadarya region	1,700	Natural gas
4	Tashkent TPP	Tashkent city	1,860	Natural gas
5	Angren TPP	Tashkent region	480	Coal
6	New Angren TPP	Tashkent region	2,100	Coal
7	Takhiatash TPP	Republic of Karakalpakstan	730	Natural gas
8	Turakurgan TPP	Namangan region	900	Natural gas

The total installed capacity of major thermal power plants exceeds 12 GW. These plants operate mainly on natural gas, with a smaller share of coal. In the context of modernization and global environmental challenges, Uzbekistan has identified diversification of the energy portfolio and expansion of investment in renewable energy sources as strategic priorities. Development maps for solar and wind energy up to 2030 at the regional level represent the practical implementation of this strategy. Large solar photovoltaic plants are planned primarily in regions with high solar radiation, such as Navoi, Bukhara, Samarkand, Kashkadarya and Surkhandarya. Gradual expansion of capacities is envisaged in Karakalpakstan and Khorezm, while mediumcapacity plants are planned in Tashkent region and the Fergana Valley. In the field of wind energy, Karakalpakstan, Bukhara, Navoi and Jizzakh regions have been identified as priority sites. Establishing large wind farms in these areas is expected to diversify energy sources, reduce dependence on conventional fuels and lower emissions, thereby accelerating the transition to a “green” economy. These development maps create opportunities to increase electricity generation, expand the share of renewables in the national energy balance and reduce carbon emissions. Successful implementation of these projects will be supported by the continued development of transmission and distribution networks, enhanced dispatch control, and the wider introduction of digital monitoring systems.

The rapid growth of electricity generation and expansion of thermal and renewable capacities have significantly increased the role of transmission and distribution networks in supporting reliable system operation. Alongside the substantial growth in installed capacities and electricity output in recent years, ongoing modernization of grid infrastructure, gradual reduction of technological losses and continued expansion of digitalization are creating favorable conditions for further improving overall system efficiency. Under these conditions, the following tasks are particularly important:

¹ Source: author's elaboration.



- Modernizing high voltage transmission lines and replacing outdated equipment with energy efficient technologies.
- Developing dispatch control based on digital platforms and implementing real time monitoring and forecasting systems.
- Implementing comprehensive programs to reduce technological losses in networks.
- Creating the necessary technical and institutional conditions for integrating renewable energy plants into existing grids.

These measures are key components for strengthening national energy security, improving reliability of electricity supply and supporting the sustainable development of the energy system.

Conclusions and suggestions

Uzbekistan's electric power system is undergoing a phase of deep institutional and technological transformation. Functional separation of generation, transmission, distribution and trade stages contributes to improved management efficiency and the introduction of market principles. Significant growth in installed capacity and electricity generation at thermal power plants, together with the deployment of CCGT technologies, increases fuel efficiency and reduces production costs. At the same time, implementation of strategic plans for diversifying the energy portfolio and expanding investment in renewable sources is gradually shifting the national energy balance toward a more environmentally sustainable trajectory. Continued modernization of transmission infrastructure, ongoing reduction of technological losses and the steady expansion of digital technologies provide a strong foundation for further improving the overall efficiency of the energy system. In the future, modernization of transmission networks, wide deployment of digital technologies, and systematic integration of renewable energy projects with transmission and distribution infrastructure will be the main directions for ensuring sustainable and competitive development of Uzbekistan's electric power system.

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