



# **MEDITERRANEO**

## **GEOPOLITICA, MIGRAZIONI, ENERGIA**

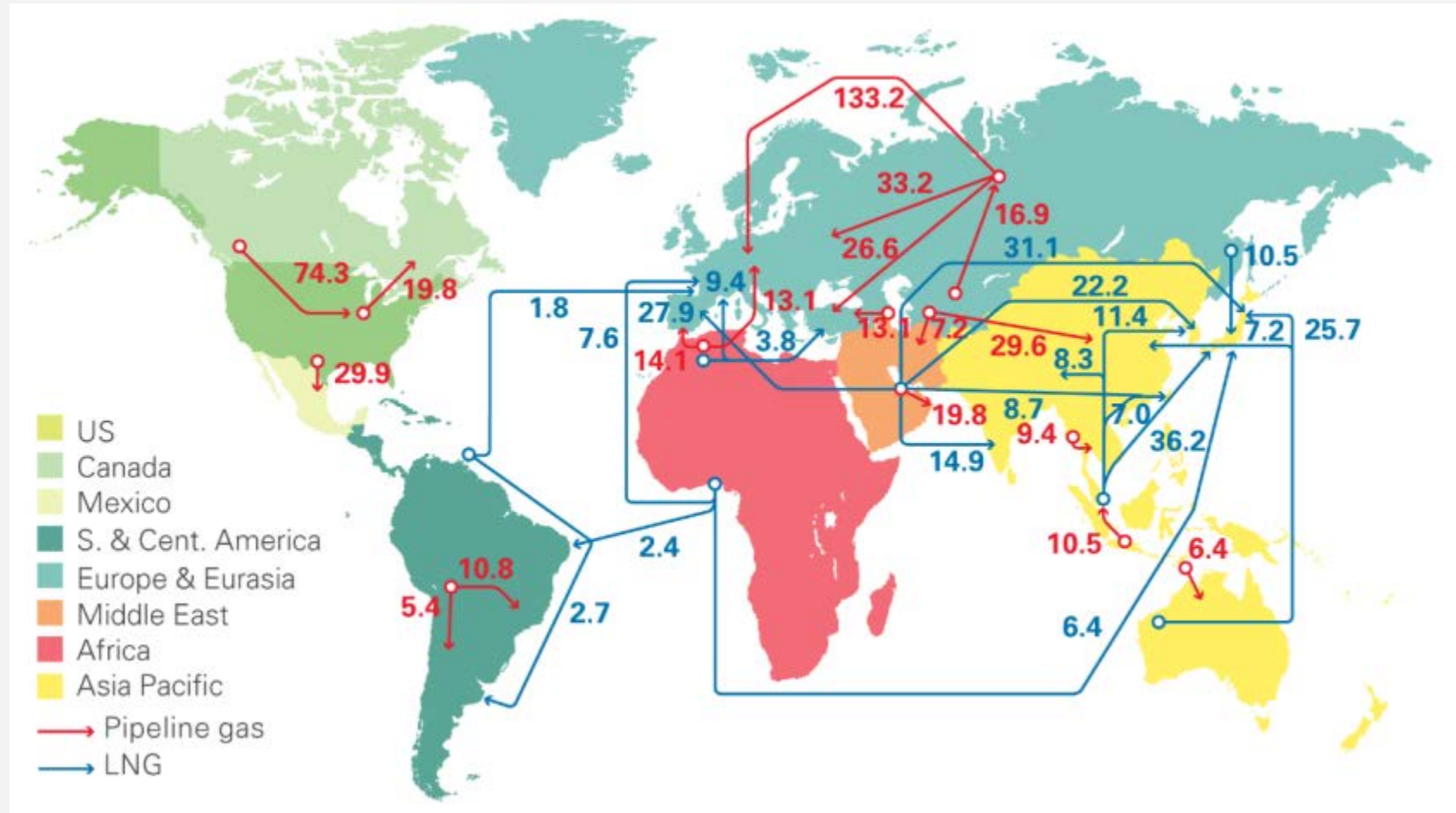
**ROMA - 6 LUGLIO 2017 - ORE 18**  
**VIA DEL QUIRINALE, 26**

*Prof. Valeria Termini*

*Commissario AEEGSI, Vice Presidente del  
CEER e Vice Presidente di MEDREG*



## Global gas trade – shipping vs pipeline

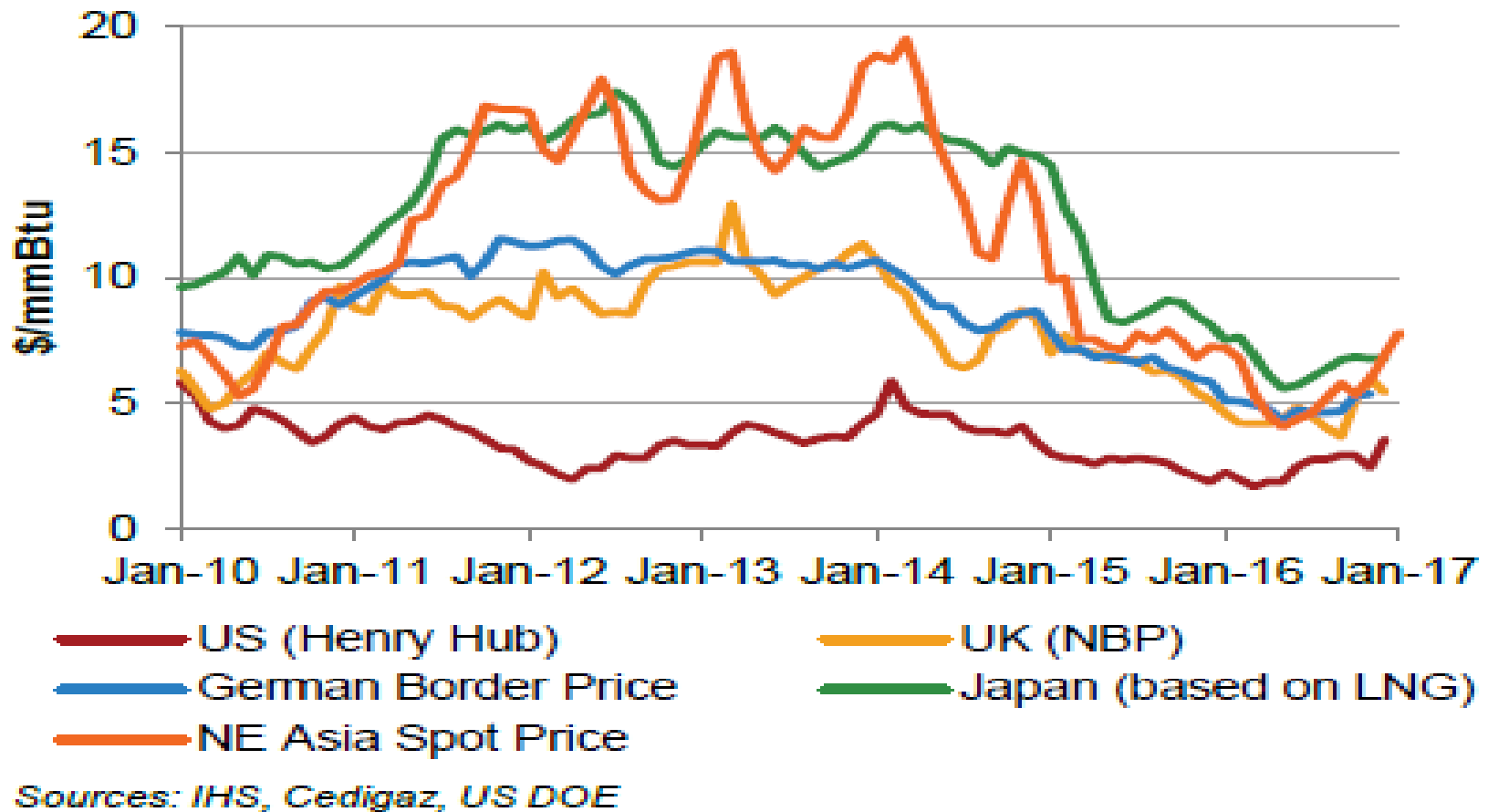


Fonte: BP Statistics 2016

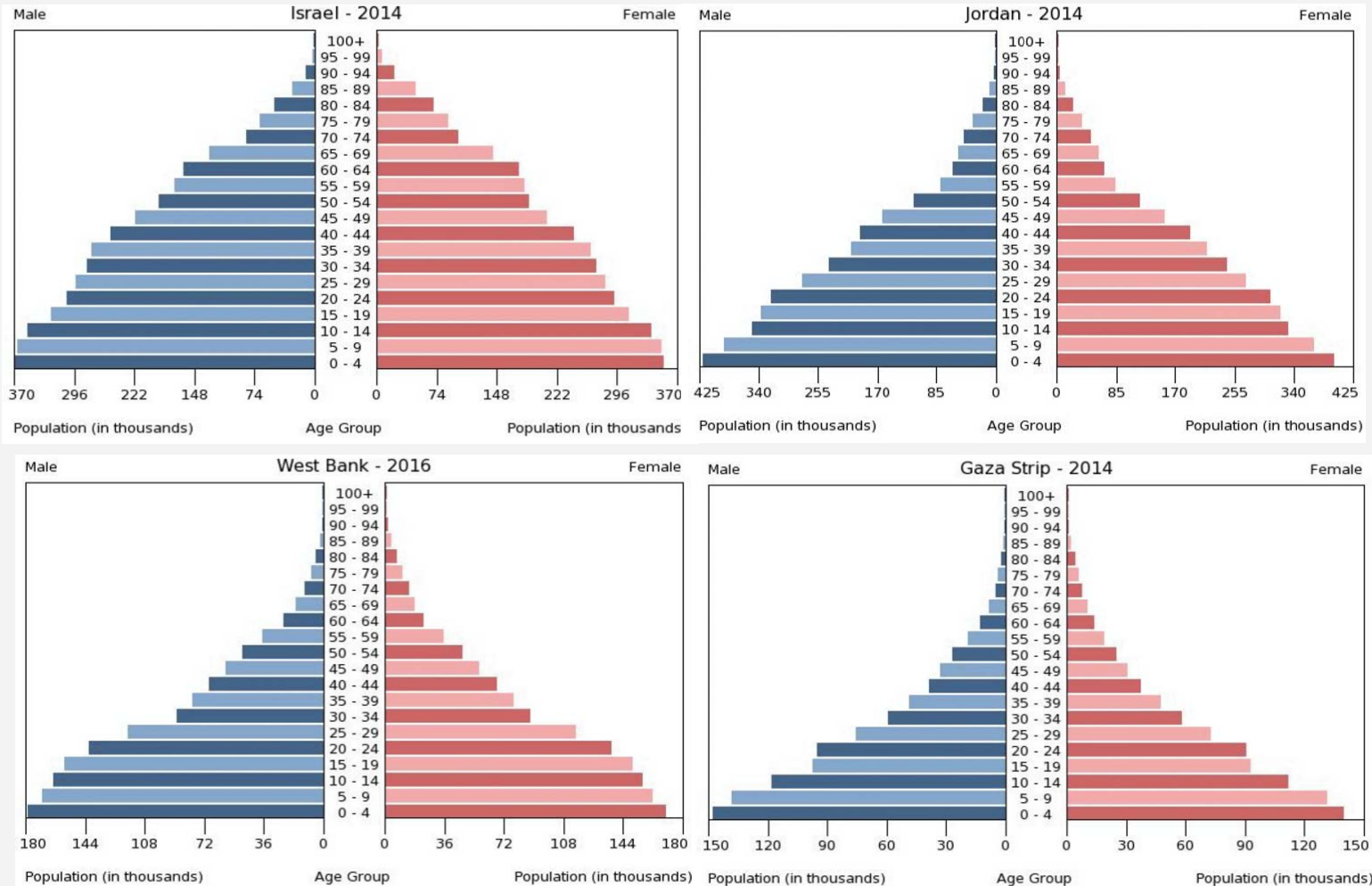
## LNG GAME CHANGERS

- FLEXIBILITY OF SUPPLY (shipping):
  - portfolio traders
  - flexibility of destination
  - shorter terms
- EVOLUTION of PRICE FORMATION

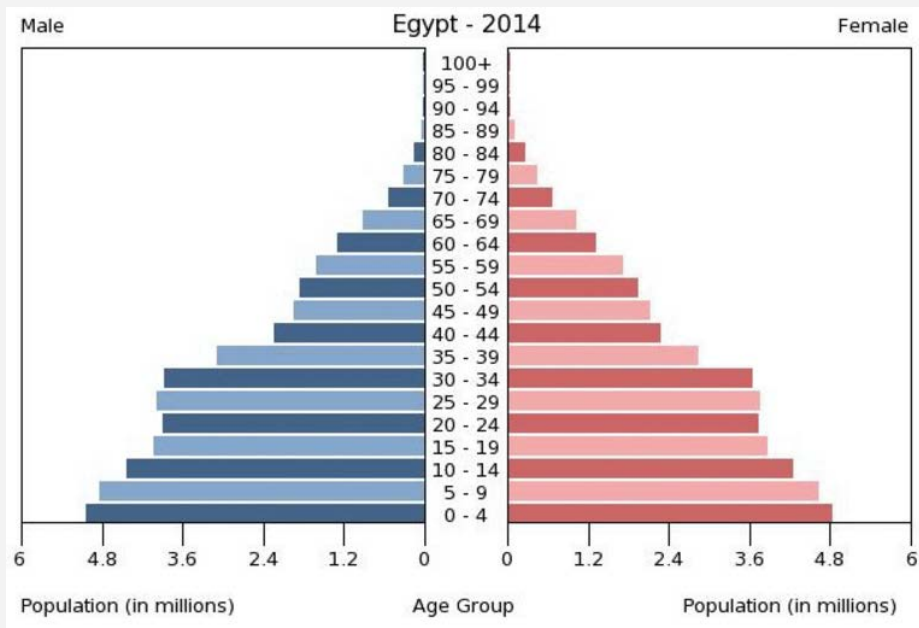
## Average Regional Gas Prices



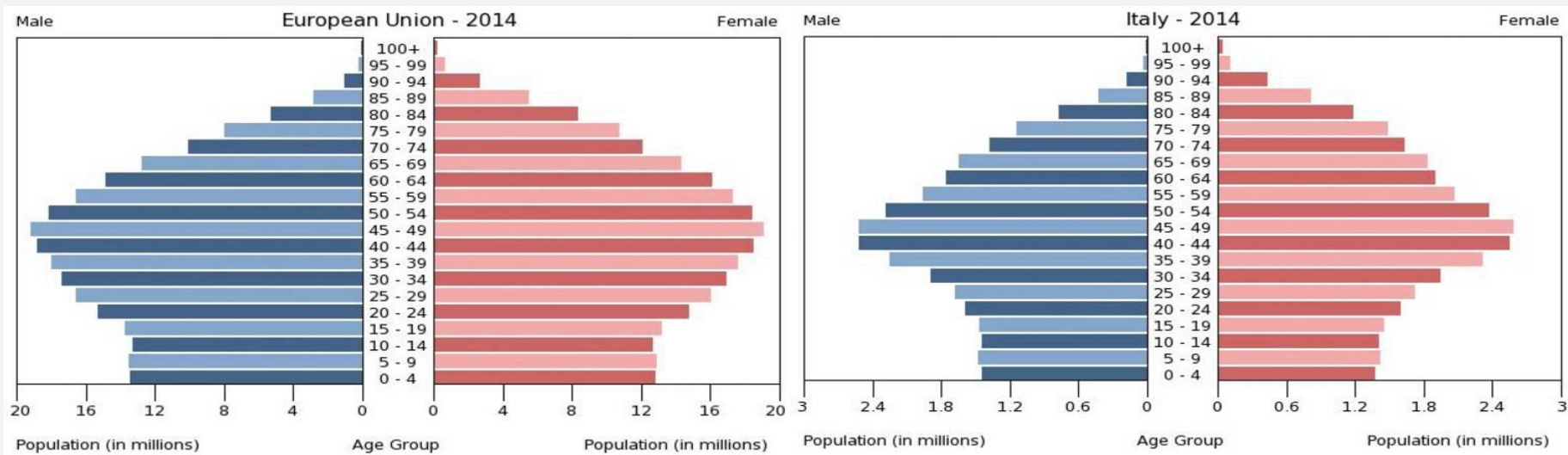
# Population - Age structure



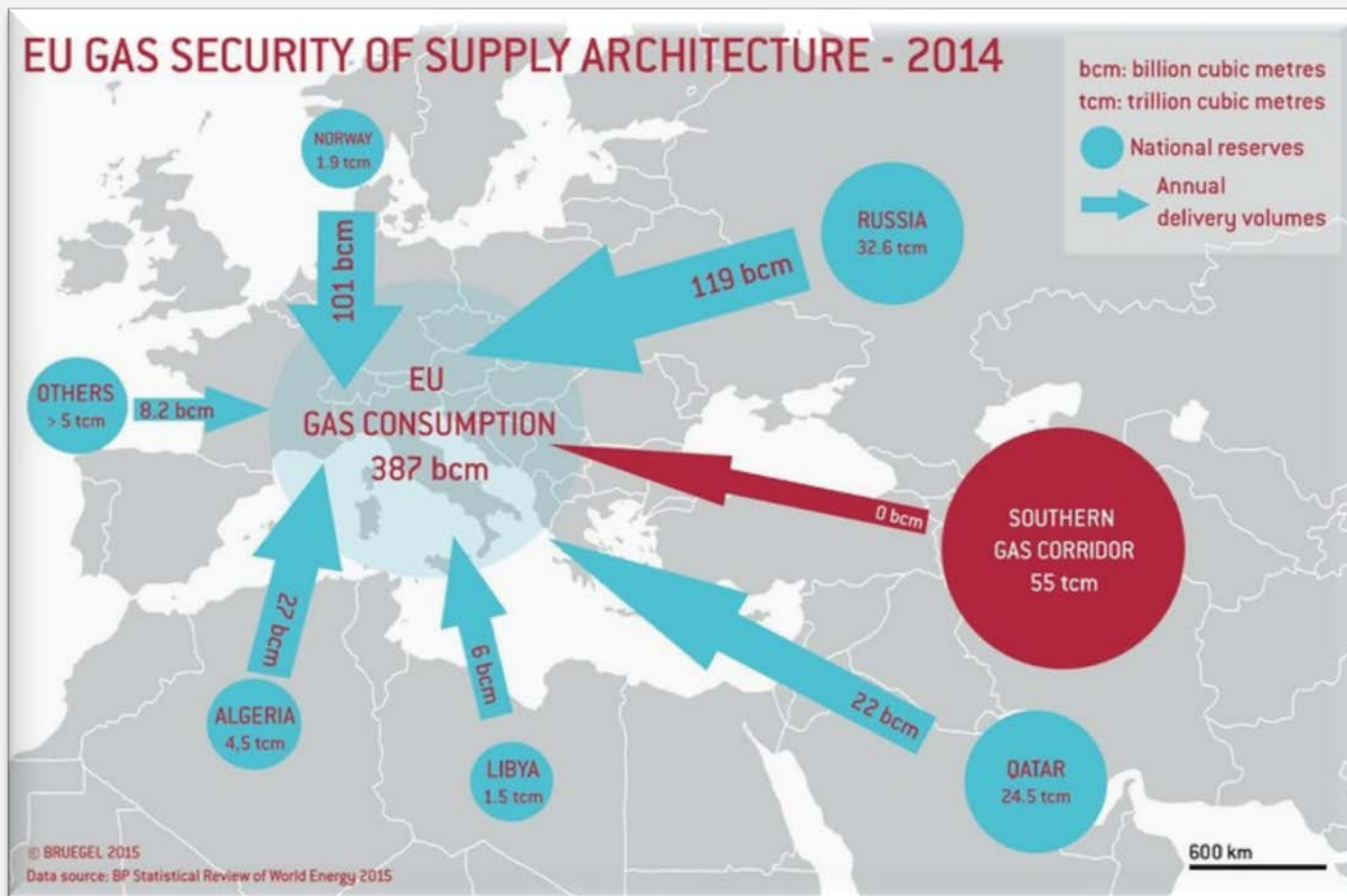
## Population - Age structure



# Population - Age structure



## The Context: Gas connexions and flows





## Mediterranean Energy Context

### European Union

- Energy Demand Growth  $\approx 1\%$
- RES Integration
- Energy Market Integration

### Turkey

- Energy Demand Growth  $\approx 5,4\%/y$  (2004-2014)
- RES objectives 30% (al 2023)
- Relevant Infrastructural Projects

### North Africa

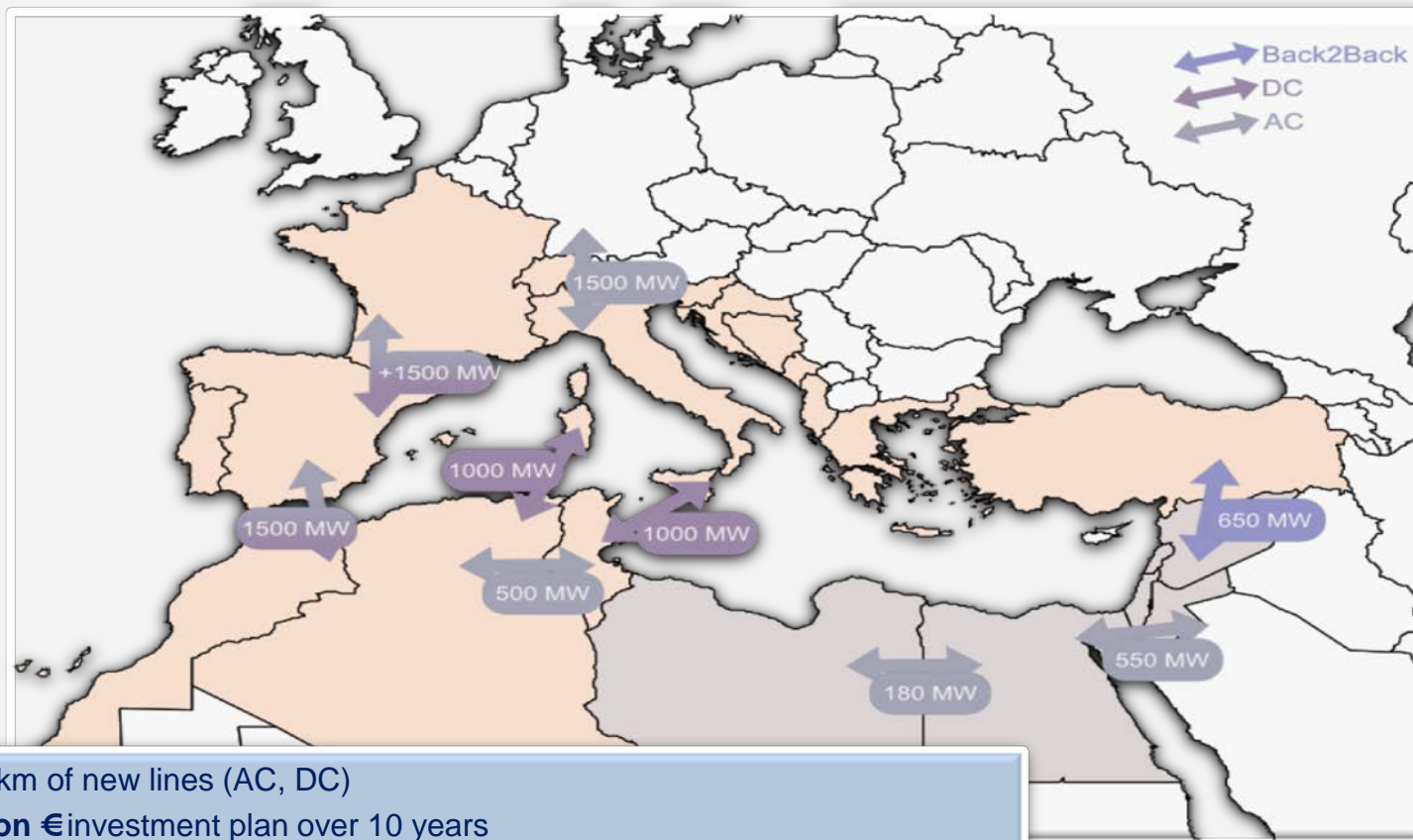
- Energy Demand Growth  $\approx 5,4\%/y$  up to 2030
- RES Objectives 30-50%
- Huge Oil & Gas Resources

### Israel

- Limited Growth
- Huge Gas reserves (1Tmc)

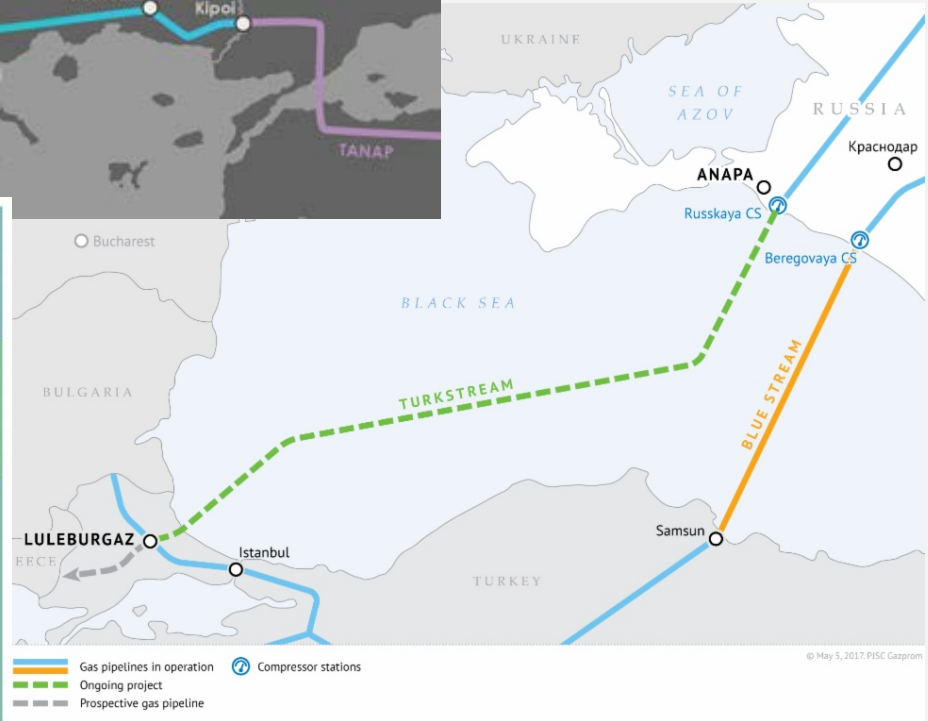
Source: BP Statistical Review

## The Context: Electricity connexions



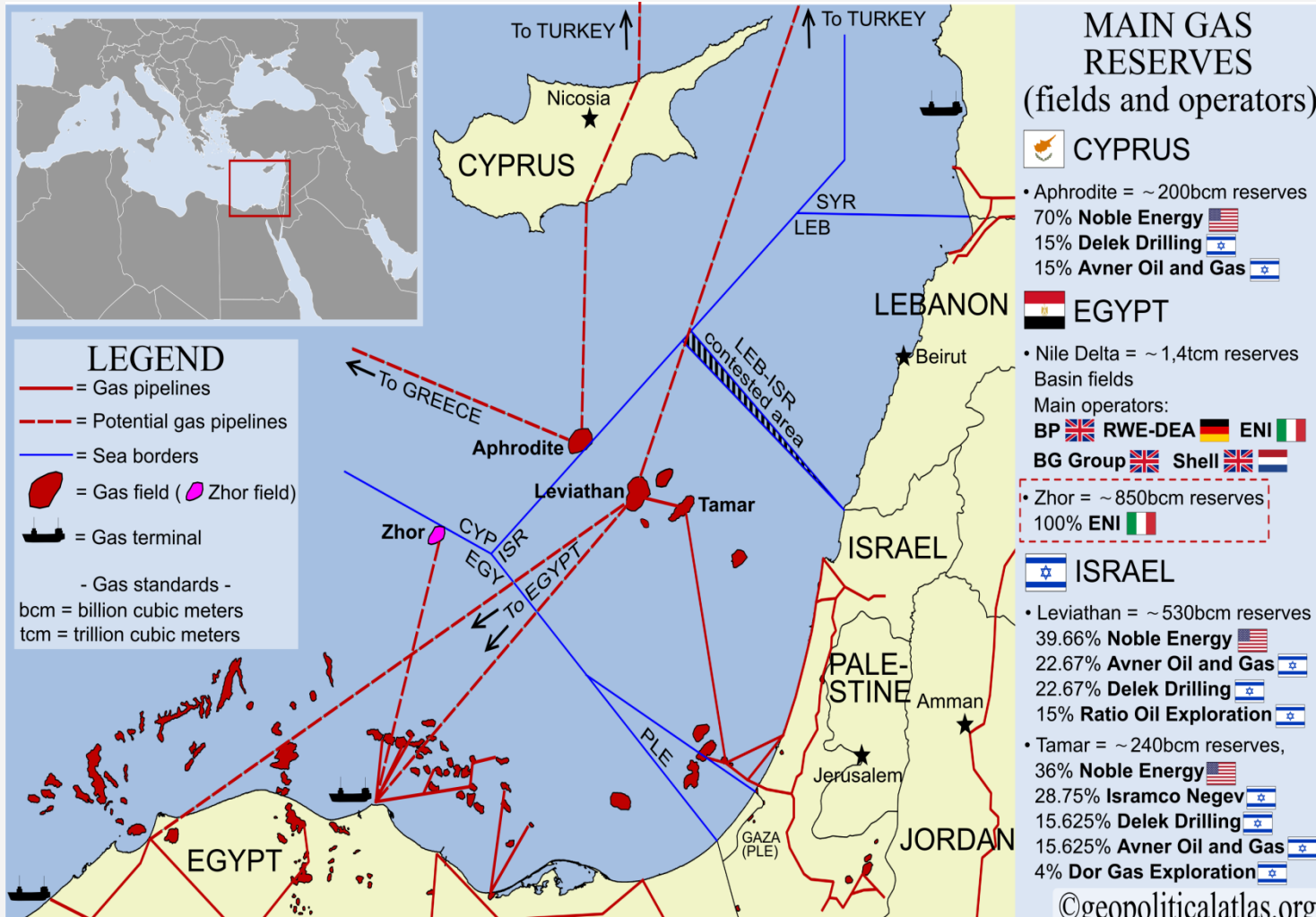
- **33,000** km of new lines (AC, DC)
- **30 Billion €** investment plan over 10 years
- New **generation capacity** of about **150 GW** (15% RES)
- Planned investment of **220-250** Billions € in 10 years
- Priority: developing interconnections South-North & South-South, jointly with reinforcement of internal network

# Southern corridor: main Projects

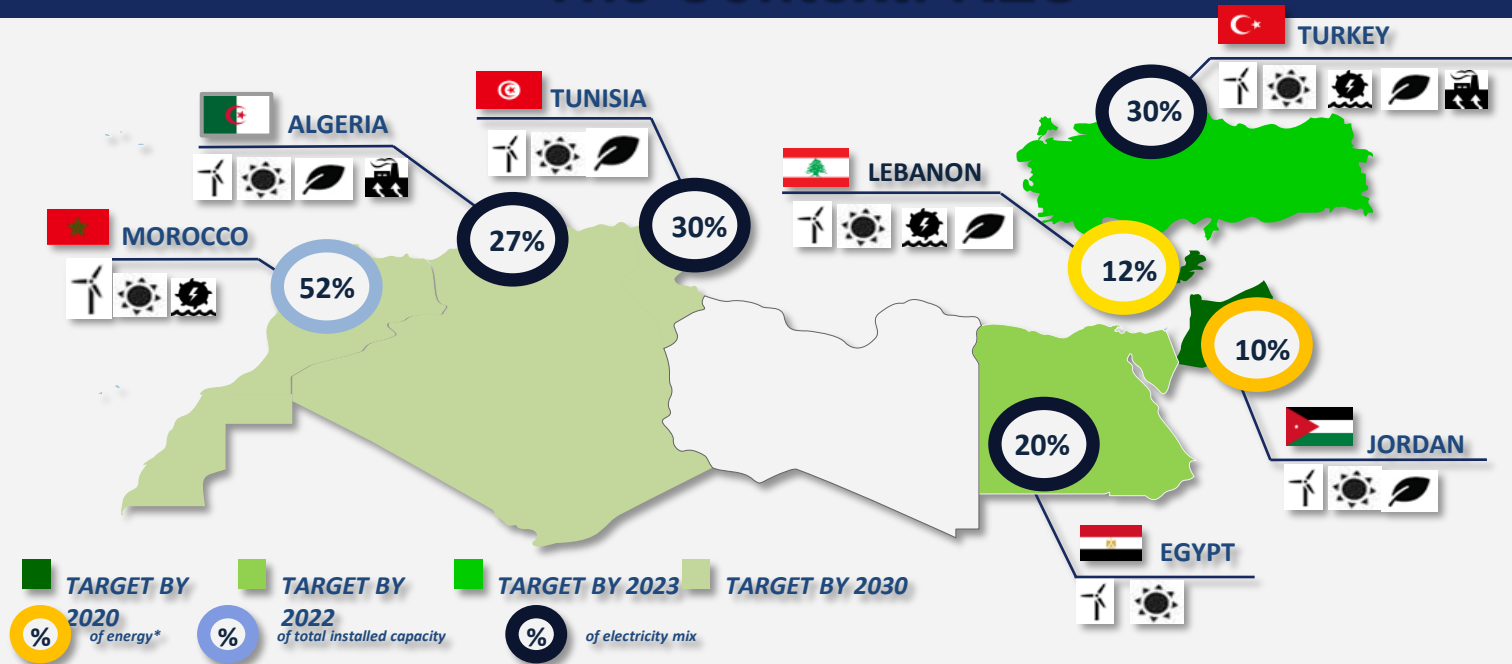


# Back up

# Gas reserves in the Mediterranean



# The Context: RES



## RENEWABLE ENERGY INVESTMENTS\*\*

Cumulative public and private investments in RES power plants to reach country targets



Source: RES4MED