



# ENERGY SECURITY IN SOUTHEASTERN EUROPE

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# OUTLINE

- What is energy security?
- Energy in Southeastern Europe – present and future
- Renewables
- Russia and Europe's energy transition
- Southern Gas Corridor
- Further questions/Discussion

# ENERGY SECURITY

- “The uninterrupted availability of energy sources at an affordable price.”  
– International Energy Agency
- “In the long run, EU energy security will be achieved by replacing imported fossil fuels with domestically produced renewable energy and improving energy efficiency (...) However, (...) natural gas still represents about a quarter of EU energy consumption. And the EU is still heavily reliant on external suppliers for this fuel. This is why the **diversification of gas supplies** and **working with reliable partners** have a vital role to play in **ensuring security of supply(...).**” – Directorate-General for Energy (European Commission) 2024

# ENERGY IN SEE- PRESENT DAY AND FUTURE

- The Problems
  - Growing population = Growing energy demand
    - Expected growth in natural gas consumption
      - 26 billion cubic meters in 2012 → 50 billion cubic meters by 2050
      - Domestic production has never been sufficient and must be supplemented through imports
        - Bulgaria, Macedonia, Bosnia and Herzegovina have no domestic natural gas production
  - Single fuel supplier – need for diversification
    - Serbia almost entirely reliant on Russian gas
  - Deficits in natural gas infrastructure – Seen as the future for clean energy production
  - Heavy dependence on carbon intensive fuels (mostly coal)
  - Low energy efficiency
  - Lack of renewables



# ALTERNATIVE ENERGY OPTIONS

- The region is lacking in the use of alternative energy
- Renewables in SEE very under-utilized
  - Albania could run almost exclusively on hydropower
  - Several countries could make up for deficits in domestic fuel production
- Few nuclear power plants
  - Long construction periods
  - High upfront cost
- There is an opportunity to drastically reduce reliance on energy imports but there is a lack of funds and interest in investment

# RUSSIA AND EUROPE

- Major supplier of natural gas and other fossil fuels to SEE
- Poor relations with neighbors
  - 2008 war with Georgia
  - Annexation of Crimea
  - Invasion of Ukraine
- Reduced supply of natural gas to European customers
- Lack of competition and stability in SEE
- Recurrent energy crises involving Russia have forced the European Union to search for alternative sources of natural gas
  - December 2023 EU proposal to allow member states to individually restrict Russian fuel imports
  - Russian gas imports limited to Austria, Hungary, Slovakia



# TURKSTREAM

- Pipeline which transports Russian gas to Europe via Turkey
  - Facilitated the importation of natural gas to Bulgaria and other Balkan states
- In operation since 2020
- The newest addition to the vast network natural gas lines which travel via Turkey



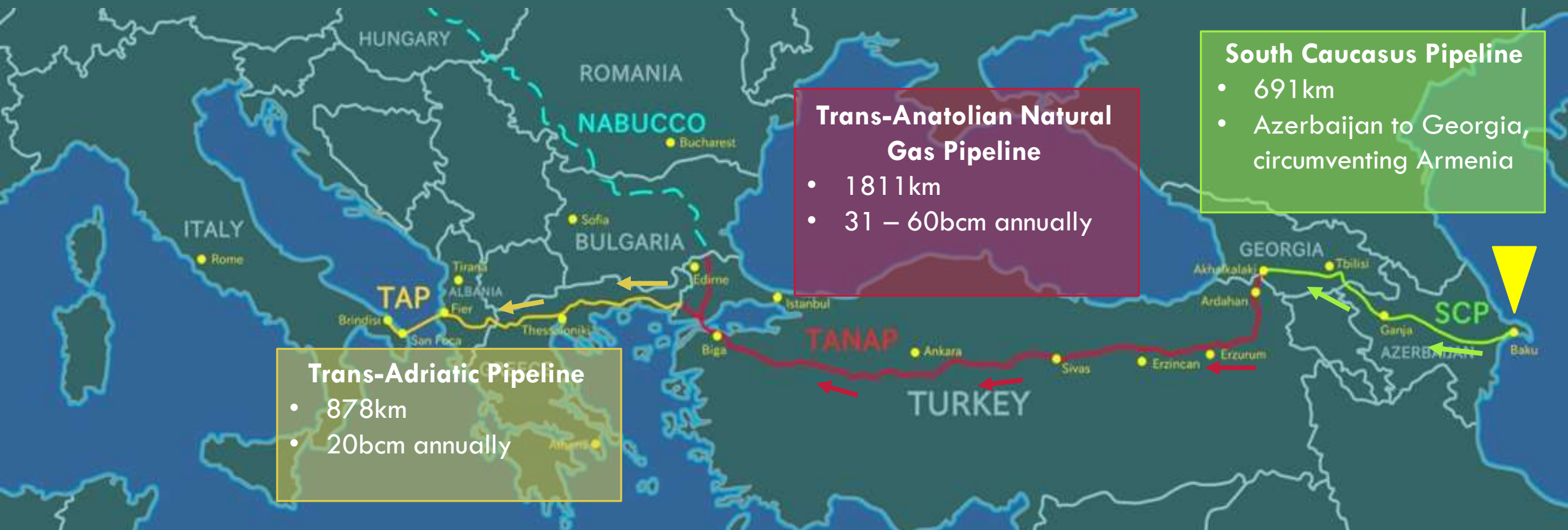
# SHAH DENIZ NATURAL GAS FIELDS

- Located off the coast of Azerbaijan in the Caspian sea
- Proven 1.4 trillion cubic meters of natural gas
- First project 'Shah Deniz I' became operational in 2006
  - Produces 9 billion cubic meters of natural gas per year
    - 6.6bcm to Turkey
- Work on expansion project 'Shah Deniz II' begins in 2008 and finishes in 2020
  - Annual delivery of 31bcm to a potential maximum of 60bcm





# SOUTHERN GAS CORRIDOR



**Trans-Anatolian Natural Gas Pipeline**

- 1811km
- 31 – 60bcm annually

**South Caucasus Pipeline**

- 691 km
- Azerbaijan to Georgia, circumventing Armenia

**Trans-Adriatic Pipeline**

- 878km
- 20bcm annually

# DISCUSSION

- Balance between mitigating climate change, increasing energy efficiency, and developing infrastructure to withstand the region's growing energy demands
- What is Turkey's role? Is it a mediator between the EU and Russia? Is Turkey attempting to become the middleman in a new SEE natural gas market?
- Are we not just shifting our dependency in the region from one country to the next?
- Is the Southern Gas Corridor able to supply the growing demands of Southeastern Europe?

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