

South East Europe Energy Outlook **2021/2022**



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A comprehensive study which deals
with the current **Energy situation**
in the SE European region from now until 2040



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South East Europe Energy Outlook 2021/2022

The «SEE Energy Outlook 2021/2022» is a comprehensive study which deals with the current energy situation in the SE European region but also covers the “Outlook” from now until 2040.

The study covers all 15 countries in the region: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Greece, Hungary, Israel, Kosovo, Montenegro, North Macedonia, Romania, Serbia, Slovenia, Turkey.

In addition, the present “Outlook” provides energy information on a number of peripheral countries including Egypt, Syria, Lebanon, Moldova, Ukraine, Slovakia, Austria, Azerbaijan and Italy which are economically and geographically related SE European core countries.

This is the third time that such a major study has been undertaken by IENE with the first one published in 2011. The study contains substantial comparative data, detailed sectorial analysis, and energy demand and production estimates and projections. Through a series of introductory chapters, where the economic and political background together with the key energy policy issues of South East Europe are presented, the study examines the impact of the regional integration process and energy competition issues on SE Europe’s energy prospects. EU’s decarbonization policy and the Green Deal are also discussed at length in relation to needed investment but also in terms of energy security. The study comprises the following parts: energy policy, energy security, country energy surveys, legal framework, regional economic issues, sectorial analysis, energy demand and supply projections for 2040 (oil and gas, electricity, renewables, energy efficiency), energy technologies and energy investment outlook.

The energy sector analysis focuses on the region’s main energy drivers such as petroleum (upstream, midstream, downstream), natural gas, power generation, renewables, energy efficiency, co-generation, and environmental protection. A major part of the study concerns the individual countries of the region and contains an energy profile of each one of the core 15 countries. A set of original energy maps for the region has been created, together with comparative data tables and economic analysis.

Another important part of the study covers the energy interconnections in South East Europe, the Black Sea and the Caspian region for oil, gas and electricity. The major energy projects of the region (oil and gas pipelines, gas storage, nuclear plants, hydrocarbon exploration projects, refineries, RES installations and energy efficiency projects) are described and fully analysed.

The study also covers latest developments in the energy market liberalization process both for electricity and gas, market competition, and also examines the broader aspects of environmental and energy security situation in South East Europe.

This year’s “Outlook” for the first time includes an analysis of the energy technologies which are appropriate for application in SEE. The study concludes with an in-depth analysis and projections of the investment potential per energy fuel and per country but also assesses the business opportunities of the region’s entire energy sector. The structure of the study is presented in the Table of Contents which follows.

Energy Outlook 2021-2022 Study Contents

- Introduction
- Regional Economic Outlook
- EU Energy and Environmental Policies and Regional Priorities
- Regional Economic Outlook
- Country Profiles
- The Peripheral Countries: Azerbaijan, Austria, Moldova, Ukraine, Italy, Slovakia, Syria, Lebanon and Egypt
- Review of Legal Framework in SE Europe
- Hydrocarbon Exploration and Production in SE Europe
- The Oil and Gas Sector
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- Energy Efficiency and Cogeneration of Heat and Power
- Energy Technology Perspectives in SE Europe
- Energy Demand and Supply Projections for SE Europe
- Investment Potential in the Energy Sector of SE Europe
- Key Messages
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Who will benefit from IENE's Study

South East Europe Energy Outlook 2021/2022

- Governments and governmental agencies
- Energy Regulators
- Electricity and gas transmission operators
- Electricity and gas utilities
- Independent power producers
- Integrated petroleum companies
- Oil marketing companies
- Hydrocarbon exploration and production companies
- Electricity and Gas distribution companies
- Electricity and gas trading companies
- Hydrogen development companies
- ESG Advisory Services
- Renewable energy companies
- ENSCO's
- Industry and trade associations
- Banks and financial institutions
- Law firms
- Consulting companies
- Independent research groups
- International accounting firms
- Investors and hedge funds
- Market analysts
- Academic researchers
- University and Polytechnic libraries

Given the current state of affairs in SE Europe and the constant flux which characterizes energy markets and the fact that certain key cross border projects, such as upstream exploration, major oil and gas pipelines, electricity transmission lines etc., have suffered serious setbacks over the last two years, mostly due to the coronavirus pandemic, with final investment decisions being constantly differed, the study provides useful insight on the latest situation, at both government and company level.

Furthermore, with the publication of the present "SEE Energy Outlook", IENE is actively contributing towards a better understanding of energy market operation at national and regional level but also in appreciating the investment prospects and business opportunities involved. One of the key observations of the study is the need for a much better organized and continuous market surveillance and analysis. This is necessary if we are to understand fully and interpret correctly the energy sector's progress and trends in the region.

The, until recently, poor statistics and lack of reliable information on projects and energy flows in particular make such a task an absolute necessity. IENE is already addressing this challenge in close co-operation with its network of partners in the region. In this respect IENE has over the years built a comprehensive energy data base for the region which is constantly being updated and could be of immense help to governments, companies and individual researchers.

The **Institute of Energy for South-East Europe (IENE)** is an independent and non-profit organization headquartered in Athens. IENE's efforts to open up and promote the discussion on energy and environmental issues is backed by an infrastructure designed develop and exemplify its positions and to foster an exchange of views through the regular publication of newsletters, research reports, briefing notes, studies, surveys, working papers etc, but also through the organisation of public events such as debates, workshops, seminars, conferences and educational visits. IENE covers the whole of SE Europe with activities and contacts in all core counties of the region.

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