

The Geopolitics of Energy in South East Europe

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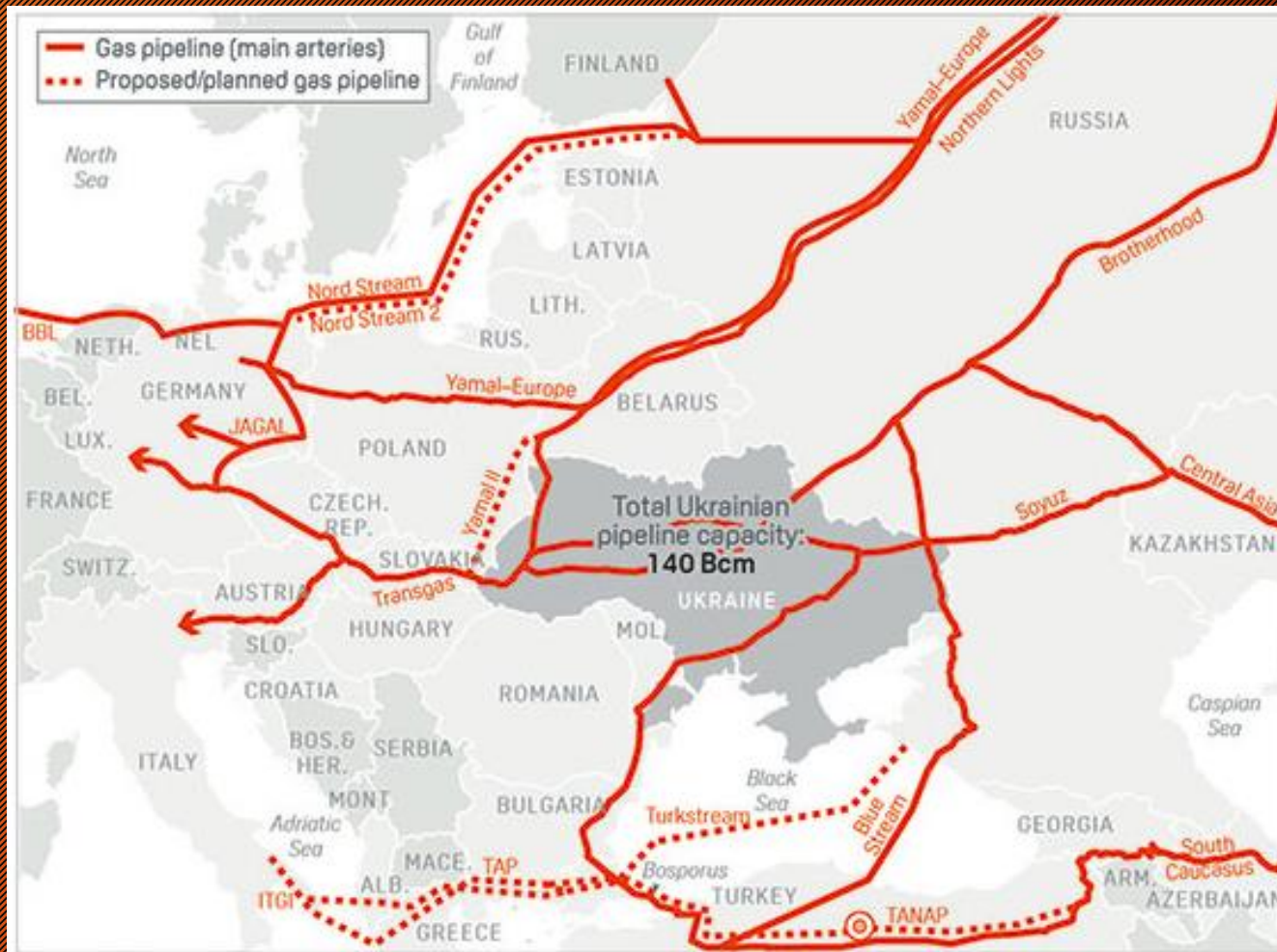
Energy Security Specialist, Methinks Ltd.

IENE Colloquium, Athens

5 March 2019

Russia: Gas Pipelines to Europe

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Source: S & P Platts
24 July 2018

TurkStream: Onwards from Ipsala/Kipoi?

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“We have installed available capacity ready to produce more than 100 bcm of gas today, so we don’t need any additional investment to produce more than 100 bcm. But in order to bring this gas to Europe we need additional infrastructure which we are working on with our European partners - NordStream 2 and Turkish Stream. This capacity will not be sufficient to bring all this to Europe. So this is why we are talking to use available capacity on Poseidon project, (the studies for which) that will be ready soon -- or maybe TAP.”
Alexander Medvedev, Gazprom Deputy Chairman, Vienna 24 January 2017.

Russia: Tough Practices Putative Black Sea Boundaries in the Wake of Russia's Annexation of Crimea

- Officially recognised EEZs

- Source: Defence24.pl



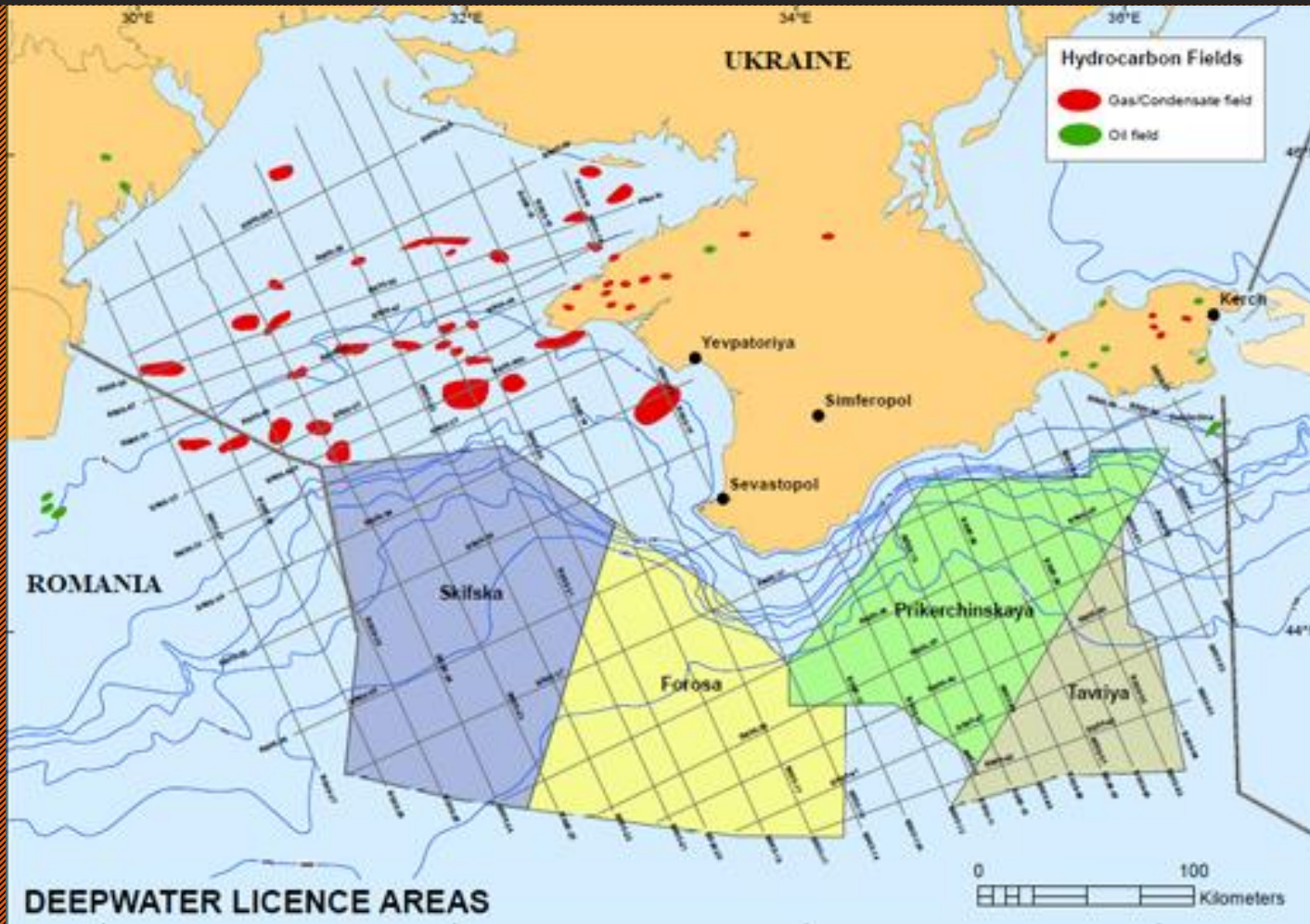
If the Annexation were to be recognised

Source: Defence24.pl



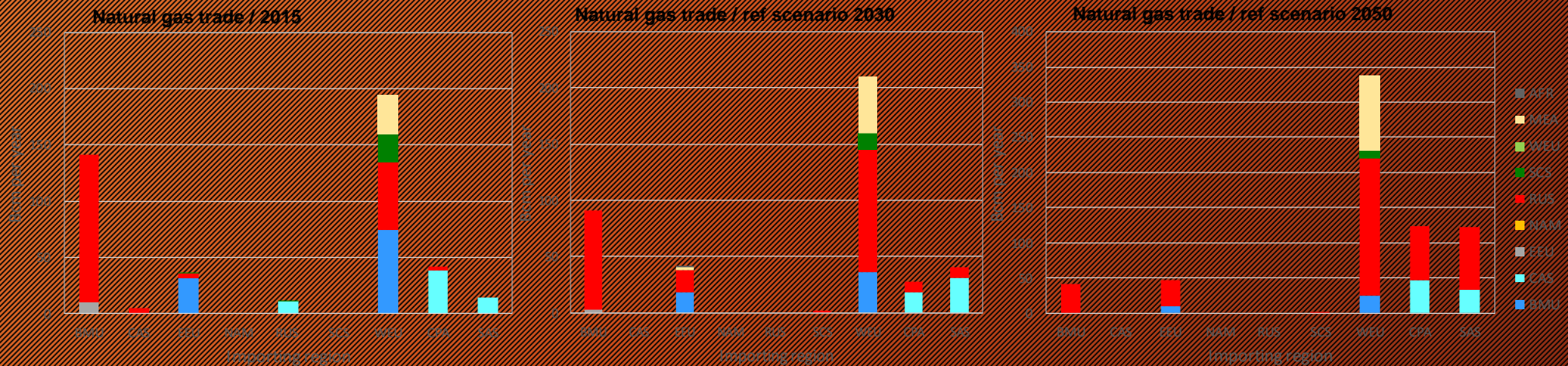
Offshore Ukraine: Consequences of the Crimean takeover

5



Four blocks impacted:
Skifska: Shell signs agreement to develop PSA in 2012. Abandoned March 2014.
Prykerchenska: Vanco signs agreements in 2006 and 2013.
Forinska: No bidding interest.
Tavriya: No bidding interest.

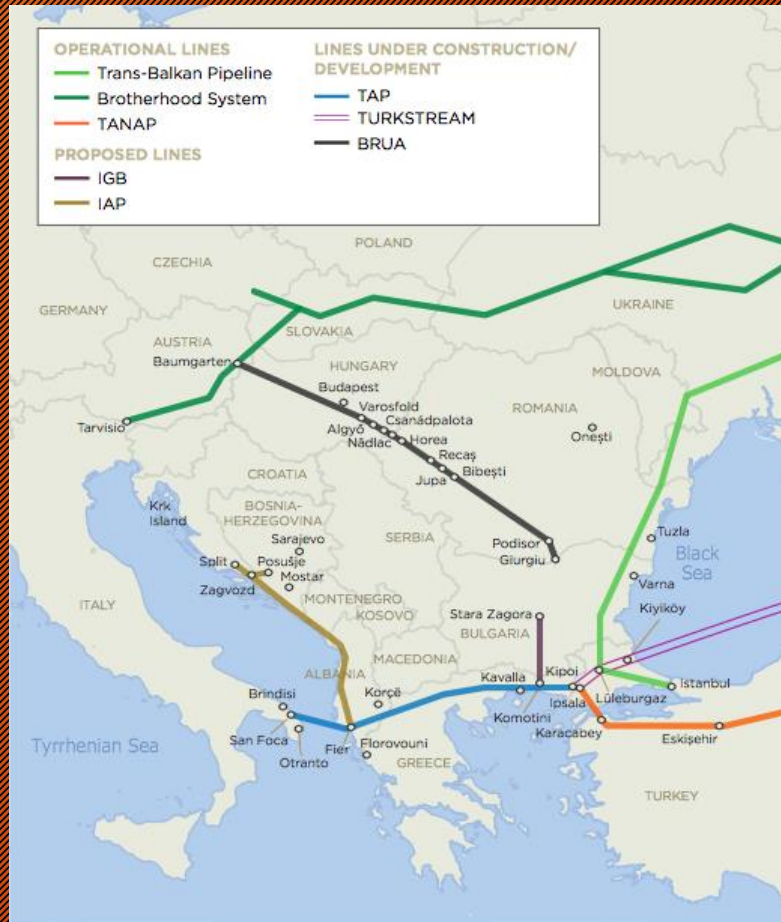
Russian Gas supplies to Europe to 2020



In reference case, it is anticipated that Western Europe will continue to heavily depend on Russian natural gas through to 2050.

Pipelines in SE Europe

Source: Atlantic Council



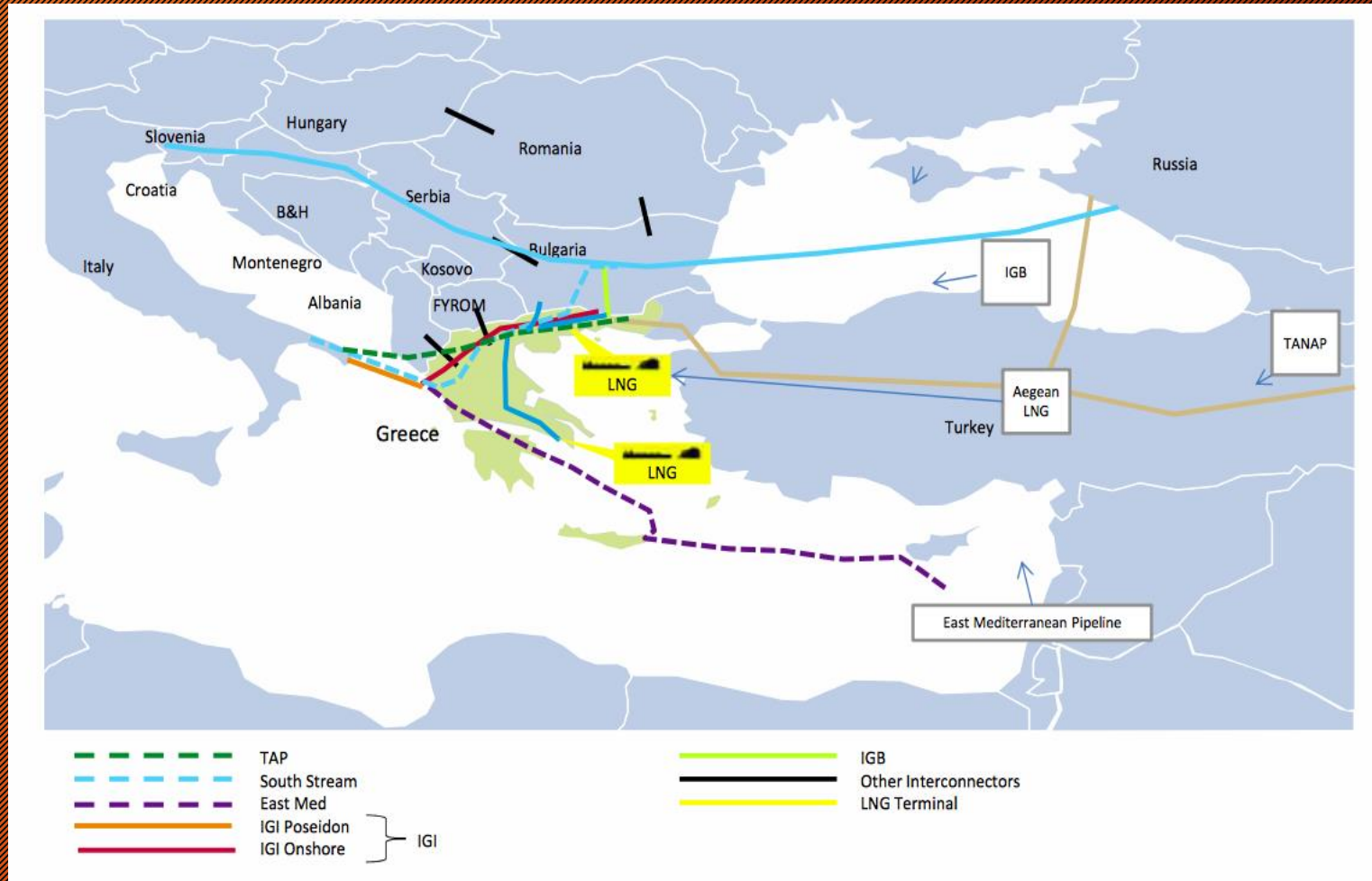
East Med: Assessed Export Options

Sources: DEPA, IENE



East Med & Regional Gas Pipelines

Source: DEPA

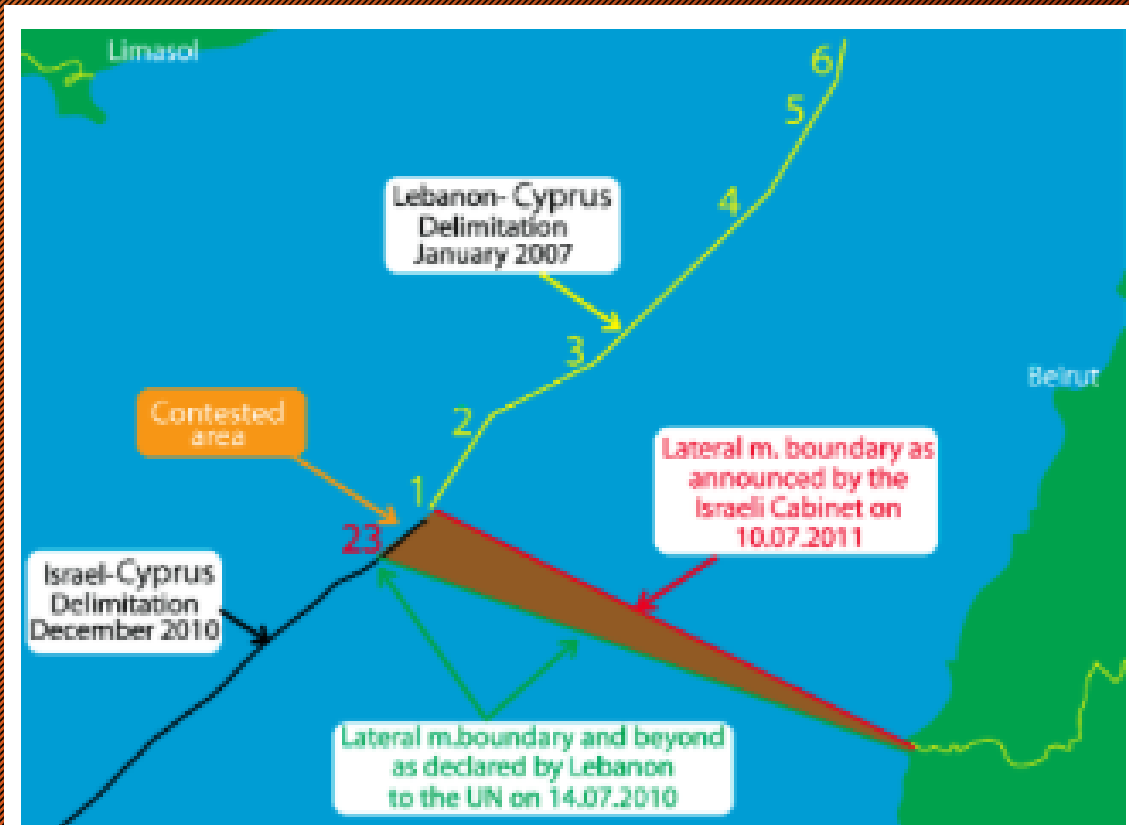


East Med Pipeline (water depths)



- Source: 'Southeastern Mediterranean Hydrocarbons: A new energy corridor for the EU', 25-4-2012, available at <http://www.defencegreece.com/index.php/2012/04/southeastern-mediterranean-hydrocarbons-a-new-energy-corridor-for-the-eu/>

Lebanon: The Maritime Boundary Dispute with Israel



Disputed border area between Israel and Lebanon (Source: PFC Energy, Memo Petroleum Risk Manager (May 2012), reproduced in GMF, Policy Brief, June 2012) (for illustration purposes only)

Eastern Mediterranean EEZs: Different Perceptions

East Med EEZs as seen by Cyprus

International Crisis Group
WORKING TO PREVENT
CONFLICT WORLDWIDE

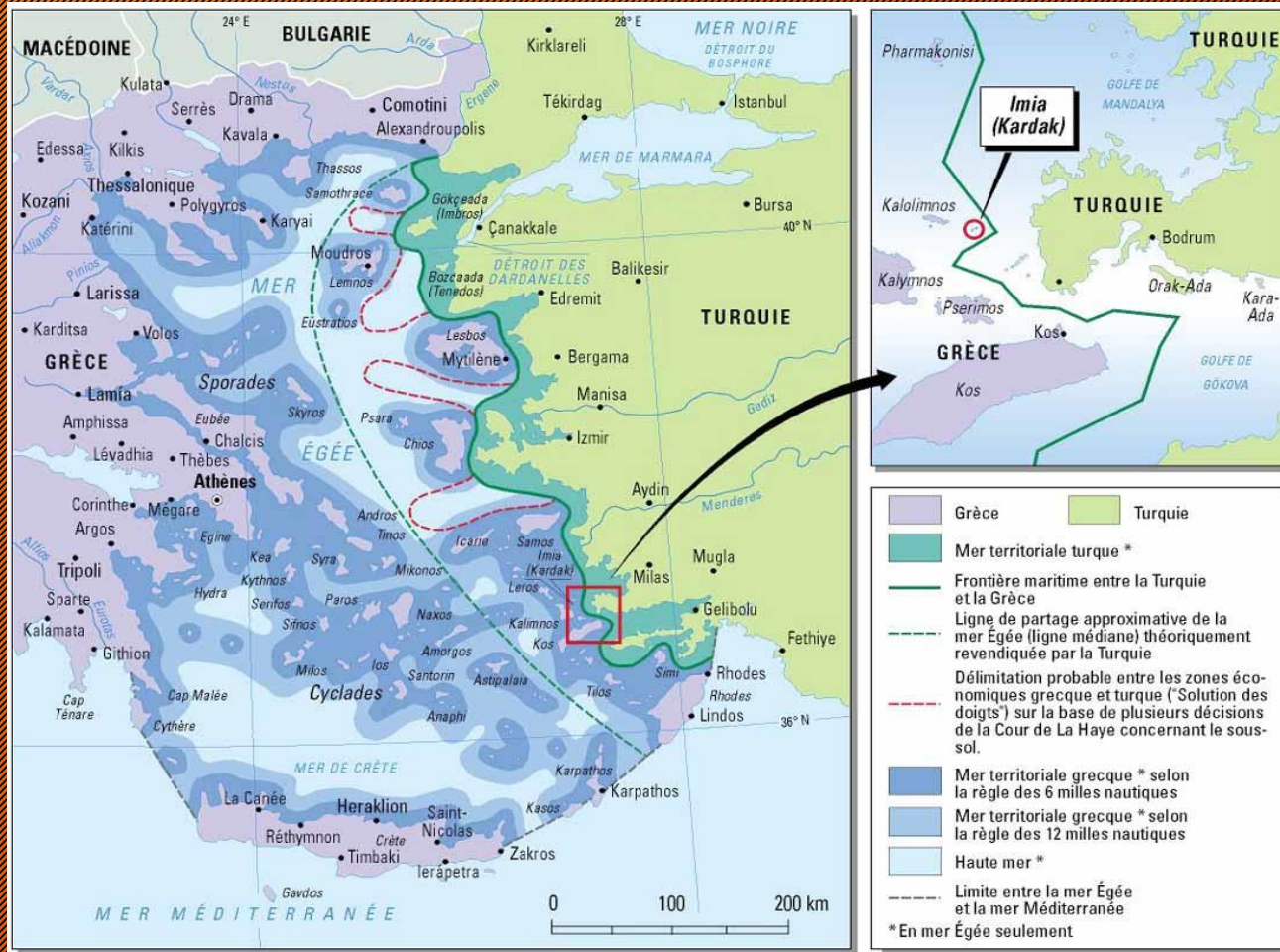


East Med EEZs as seen by Turkey

International Crisis Group
WORKING TO PREVENT
CONFLICT WORLDWIDE



Greek & Turkish Issues in the Aegean



SOURCE: Le Monde diplomatique

Greek and Turkish claims in the Aegean
Philippe Rekacewicz,
January 1997

Sources : Andrew Wilson
, *The Aegean Question*, Adelphi Papers, No. 155, London, 1979. Jean Touscoz
, *Atlas géostratégique*, Larousse, Paris, 1998.

Caspian Boundaries

Source: Verisk Maplecroft

