

# The East Mediterranean's Energy Transition

From Competition to Collaboration

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# The Natural Gas Wave

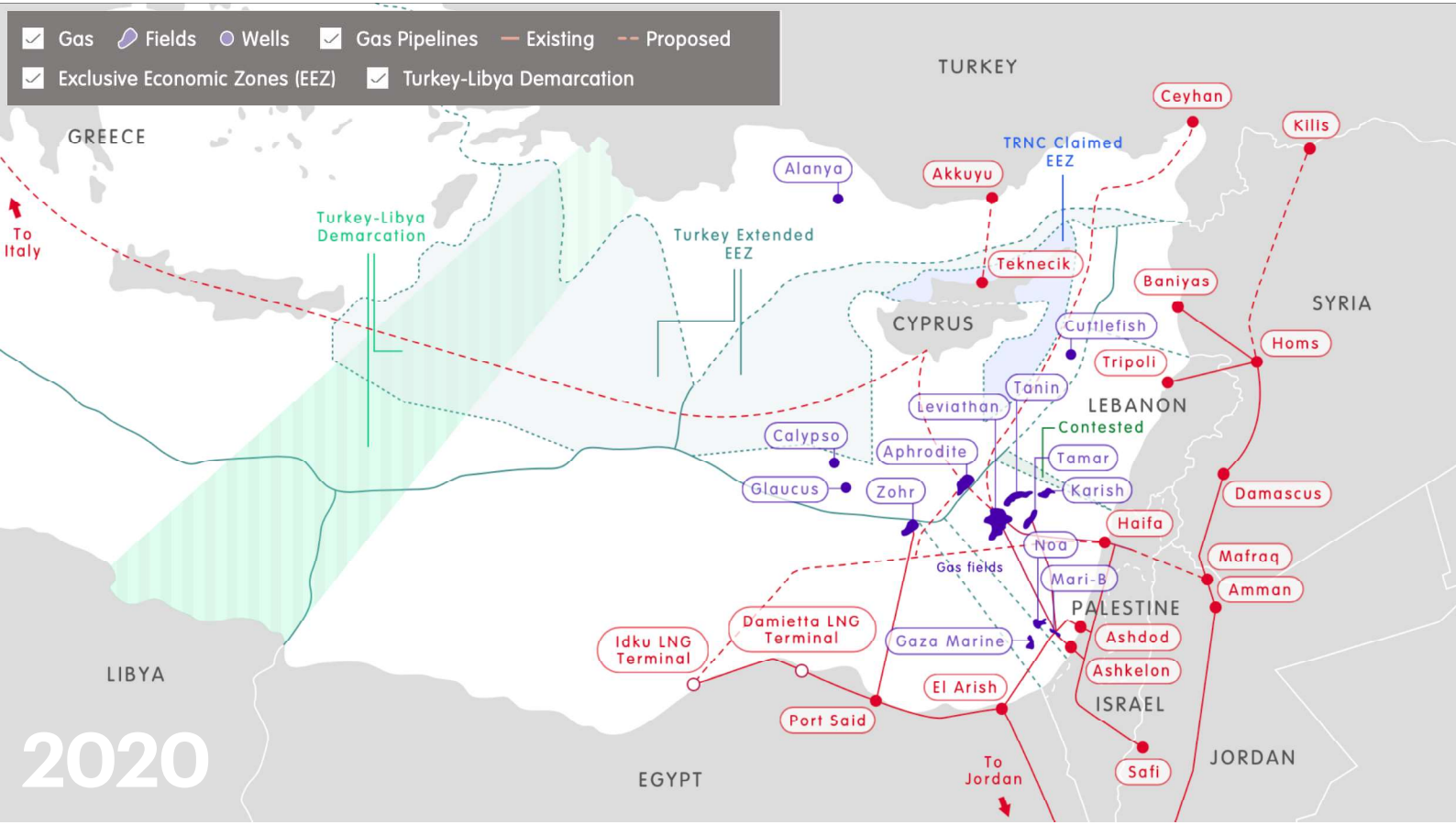


**In 20 years, the region transformed from an energy importer into a natural gas producer seeking to become an exporter to European and Asian markets**

**Since 1999 approximately 80 TCF of offshore natural gas fields have been discovered in the EEZs of Israel, Egypt, and Cyprus**

☒ Gas
 ☒ Fields
 ☒ Wells
 ☒ Gas Pipelines
 ☒ Exclusive Economic Zones (EEZ)
 ☒ Turkey-Libya Demarcation

— Existing
 - - - Proposed



2020





# **The Return of Energy Security**



# Does the EU need the Eastern Mediterranean gas?

European gas demand has declined by 20% since Russia's invasion of Ukraine.

The EU's LNG consumption is forecasted to peak in 2025

EU has plans to reduce its demand for natural gas, could fall by 80% by 2050

EU has plans to double the share of renewables from 23% to 45% by 2030

EU has plans to reach net zero emissions by 2050

A satellite night-time photograph of the Eastern Mediterranean region. The image shows the coastlines of Europe, North Africa, and the Middle East, with numerous city lights glowing against the dark land and sea. The text 'A way forward for the Eastern Mediterranean' is overlaid on the right side of the image.

# A way forward for the Eastern Mediterranean



# **An integrated interconnected Mediterranean Energy System**

Regional sharing of natural gas resources

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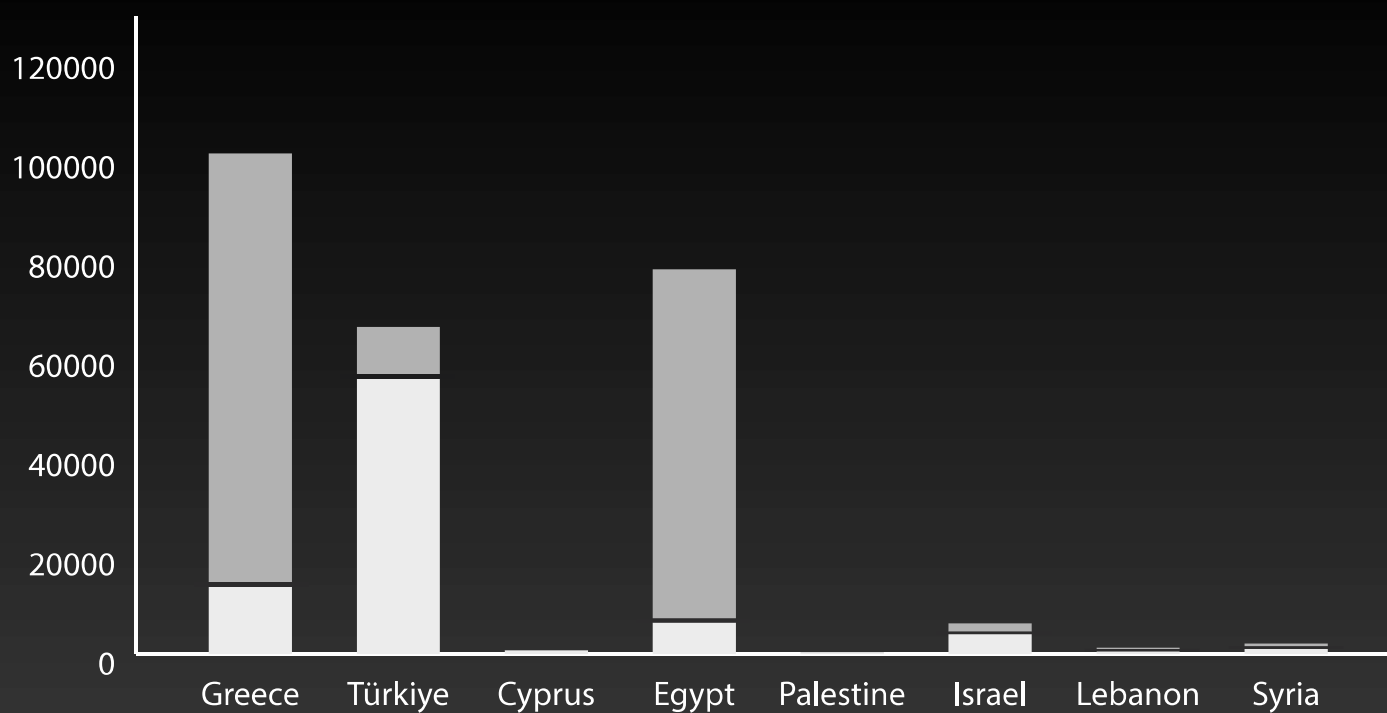
Most regional countries lack energy security, integration could alleviate this

Israeli and Cypriot gas to Egypt  
Lebanese gas to Syria (?)

# **An integrated interconnected Mediterranean Energy System**

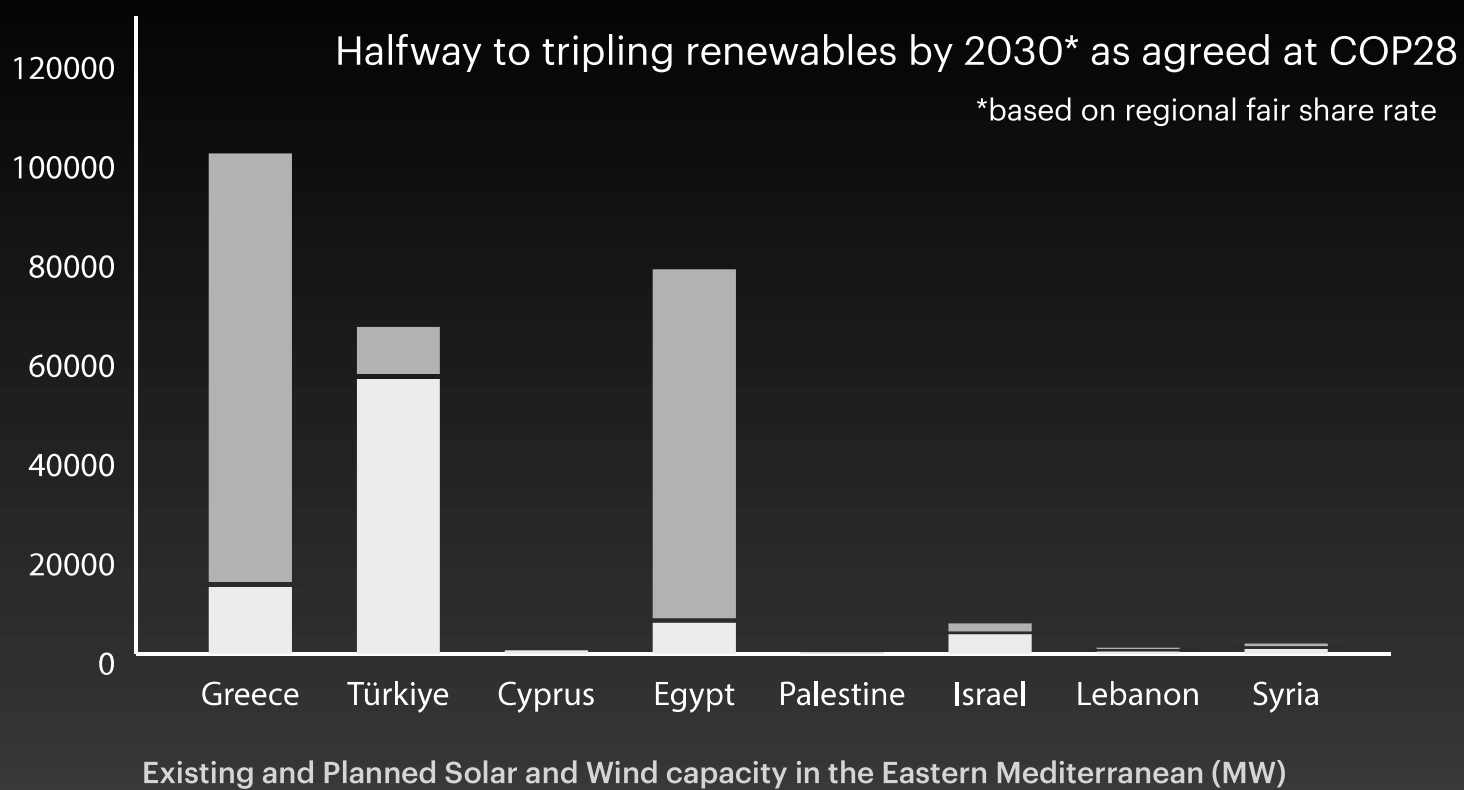
Regional sharing of natural gas resources

Accelerate energy transition plans



Existing and Planned Solar and Wind capacity in the Eastern Mediterranean (MW)





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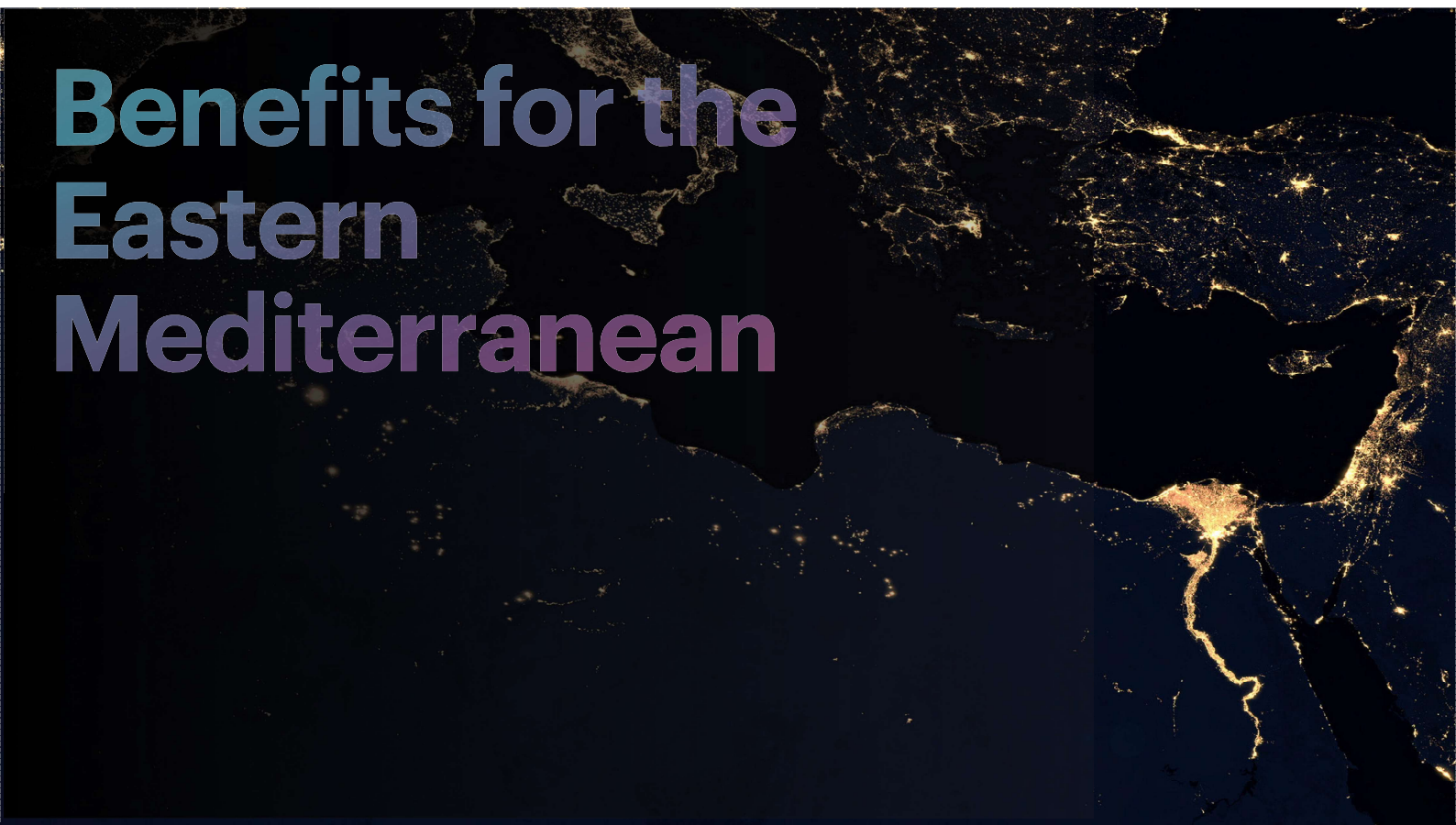
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Expand storage capacity (Pumped hydro, batteries, hydrogen)

Develop Demand Side Management and Smart Grid (including Grid to Vehicles)



# Benefits for the Eastern Mediterranean



# Energy as a pathway for regional prosperity

Energy Security for the Eastern Mediterranean

<b>Greece</b>	<b>59.2%</b>
<b>Türkiye</b>	<b>53.9%</b>
<b>Cyprus</b>	<b>28.7%</b>
<b>Egypt</b>	<b>10.6%</b>
<b>Israel</b>	<b>20.8%</b>
<b>Lebanon</b>	<b>20.8%</b>
<b>Syria</b>	<b>15.3%</b>

Share of renewables in total electricity generation capacity (2022)

# Energy as a pathway for regional prosperity

Energy Security for the Eastern Mediterranean

Renewable Energy systems and interconnections drive collaboration, not competition




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Economic opportunities in the energy transition and job creation across the value chain





**Clean energy  
accounted for 10% of  
global GDP growth  
(\$320 billion) in 2023**

**The scale-up of  
renewable energy  
deployment  
expected to create  
30 million new clean  
energy jobs by 2030**

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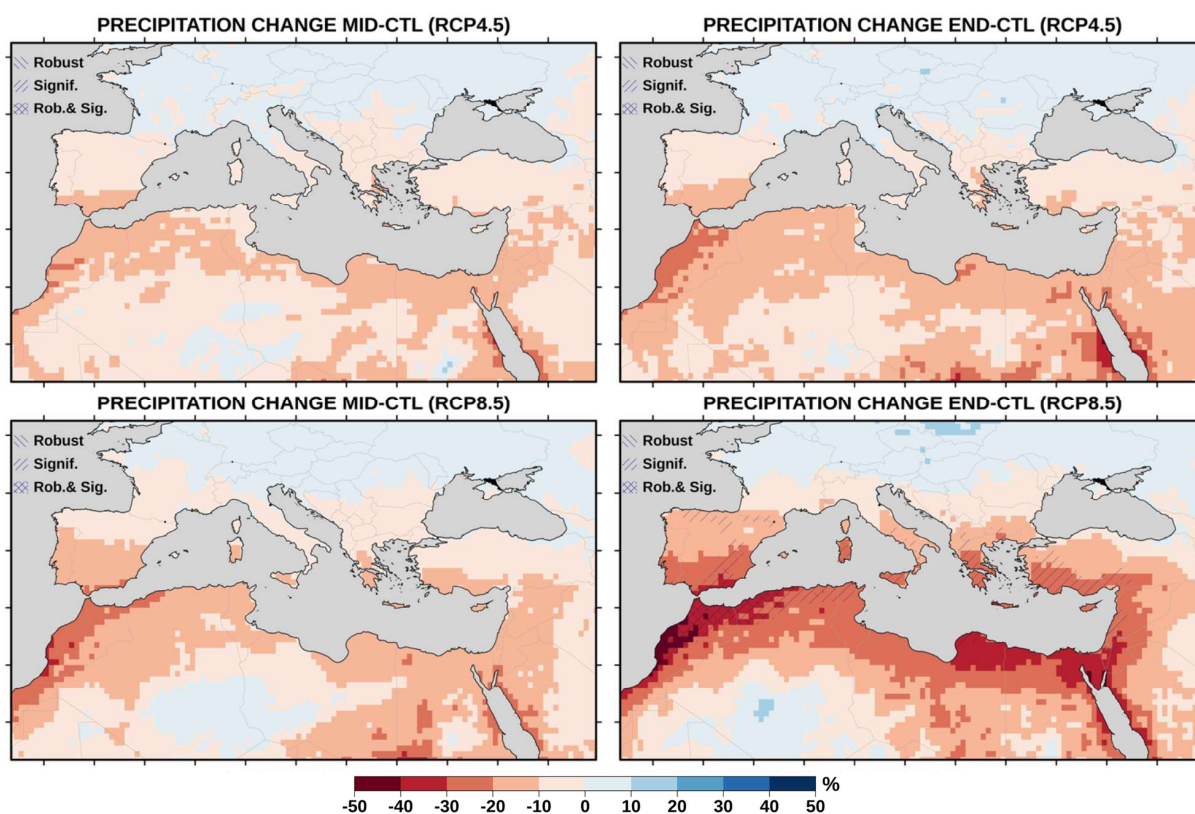
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Reducing regional climate risk by delivering on climate targets





Thank you!

X @NomadandSettler