

The development of the Gas market in SEE

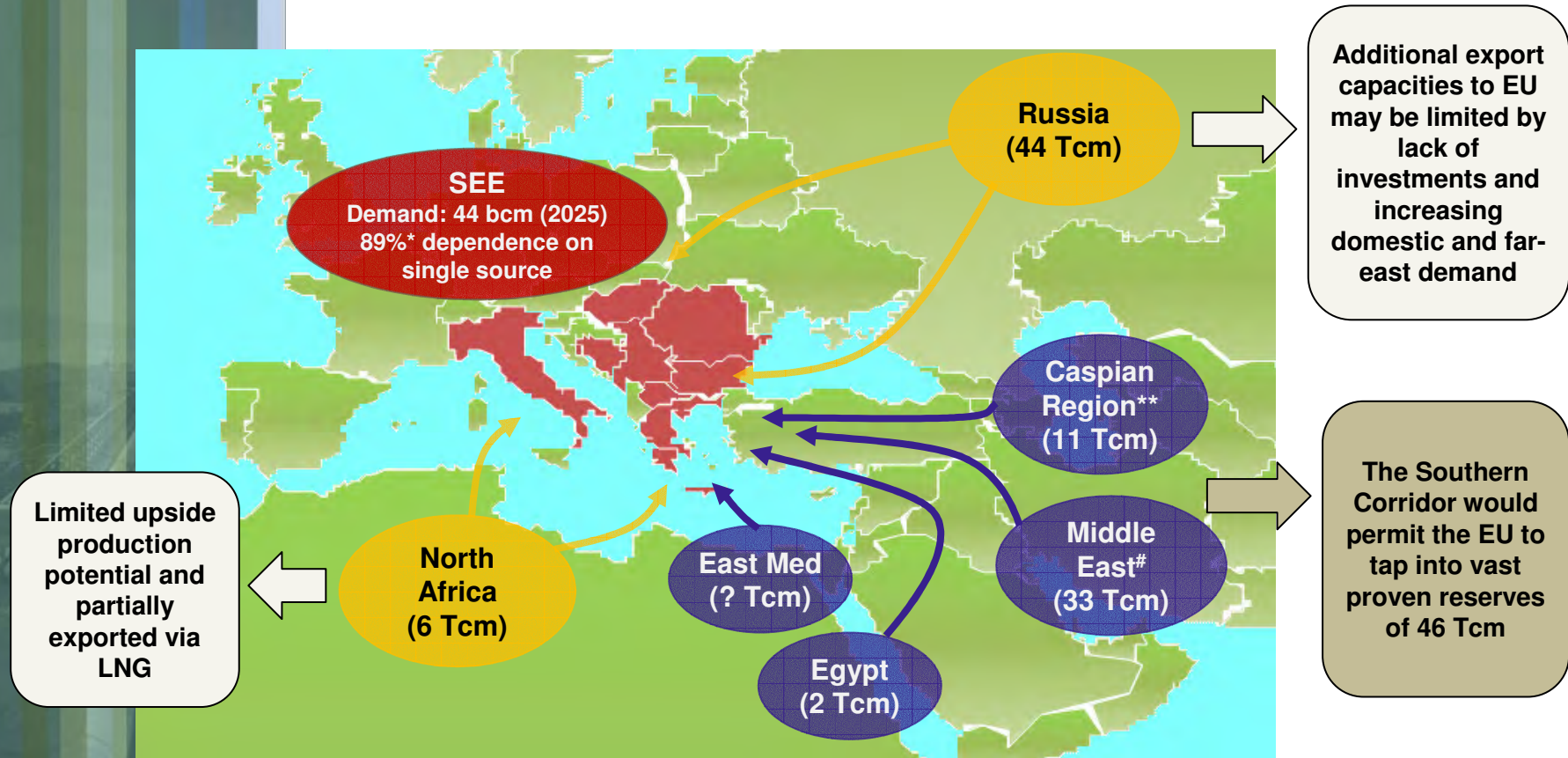
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A Southern Corridor would significantly strengthen SEE's security and diversification of supply



Source: BP Statistical Review of World Energy 2010

*Excludes Italy

● Traditional external supply sources

** Azerbaijan, Kazakhstan, Turkmenistan

● Potential new supply sources

Iran, Iraq



Forecasted Demand in Italy, Greece and SE Europe



SEE countries include: Albania, Serbia, Romania, Bulgaria, FYROM, Greece, Hungary, B&H
 13/12/2011 Tirana

Energy Demand in Albania





The ITGI System can spur the development of the Southern Corridor because...

It is the most mature and advanced project of the Corridor





The ITGI System can spur the development of the Southern Corridor because...

Its volumes are commensurate with the SD-2 volumes and timing





The ITGI System can spur the development of the Southern Corridor because...

It is scalable, allowing progressive expansion to meet supply and demand growth





The ITGI System can spur the development of the Southern Corridor because...

It provides for reverse flows, thereby facilitating greater flexibility and security for SEE





The ITGI System can spur the development of the Southern Corridor because...

It reinforces the prospects for developing new interconnections, enabling supply to the whole SEE region





The ITGI System can create synergies with future gas infrastructure in the Western Balkans





IGB, An aggregator of various sources, delivering gas in South Eastern Europe

IGB's Commercial Company will operate as an **aggregator** of a multitude of natural gas sources and it will:

Further enhance the diversification of supply sources in the SEE

Address the need and facilitate the gasification of the Western Balkans





DEPA, together with its strategic partners, is at the forefront of gas market developments in Greece and the SEE region

