

INVESTMENT PROSPECTS IN THE GREEK ENERGY SECTOR

ΚΕΠΠ – CAPITAL LINK CONFERENCE
ON CHALLENGES & OPPORTUNITIES IN GREECE TODAY

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INSTITUTE OF ENERGY
FOR SOUTH EAST EUROPE





SOME KEY FACTS (a)

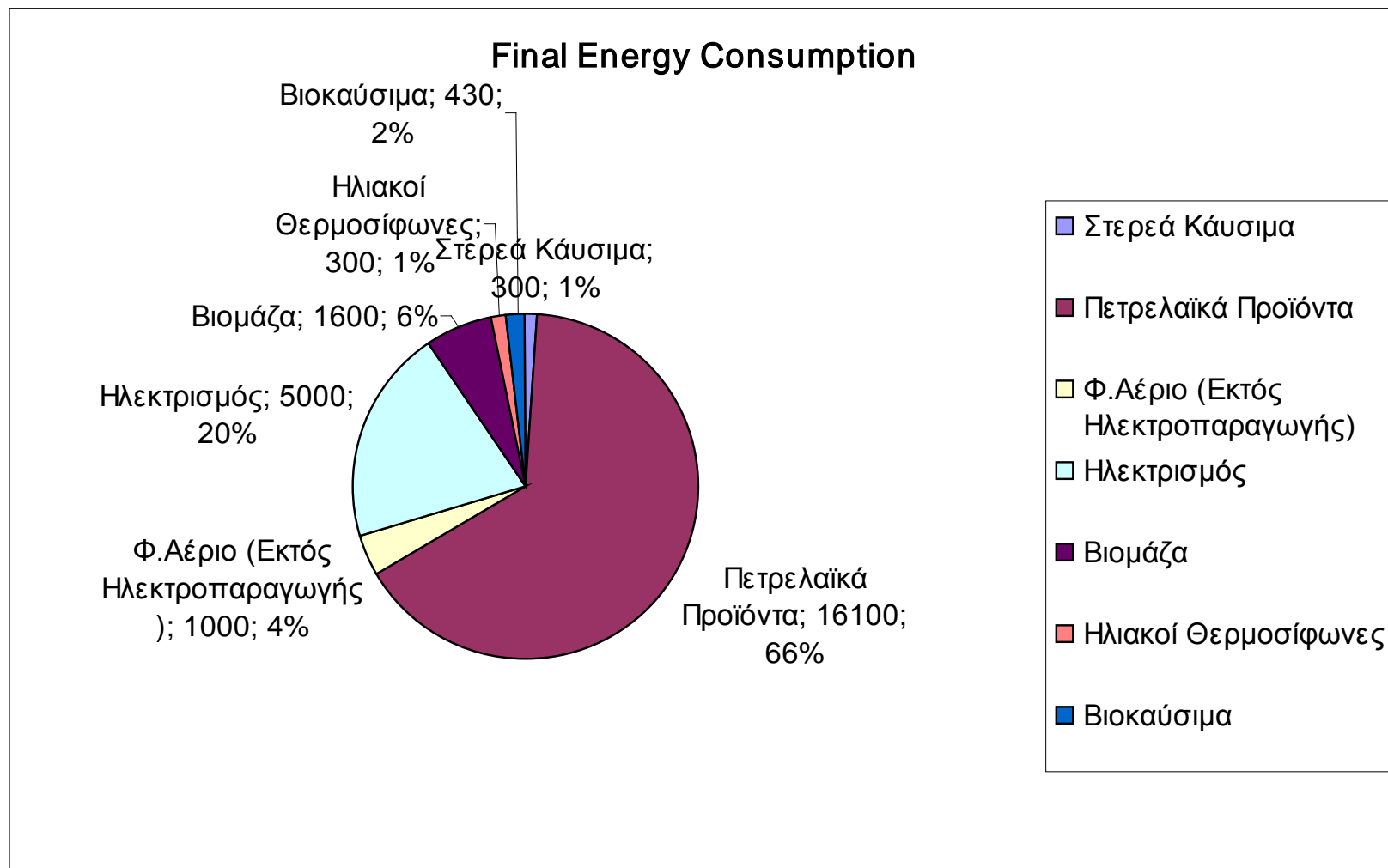
- Greek Energy Sector corresponds to 15% of GNP
- More than 250,000 people employed directly in the sector - oil refining, oil marketing and retail, electricity production and distribution, RES production, related manufacturing
- Oil dominated energy sector (65%) with 420,000 barrels per day oil consumption



SOME KEY FACTS (b)

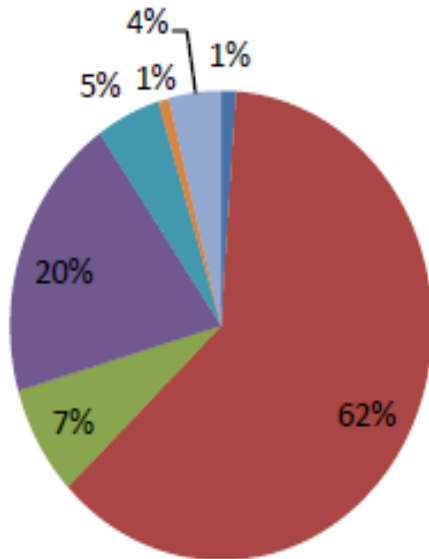
- Hydrocarbon imports exceeded 16.0 billion Euros in 2008 at 12.0 billion in 2009
- RES contributes only 5.0 % of primary energy production
- Total Installed Electricity Capacity ~ 13,000 MW
- RES Installed Capacity ~ 1,200 MW

Final Energy Consumption (ktoe) – 2010

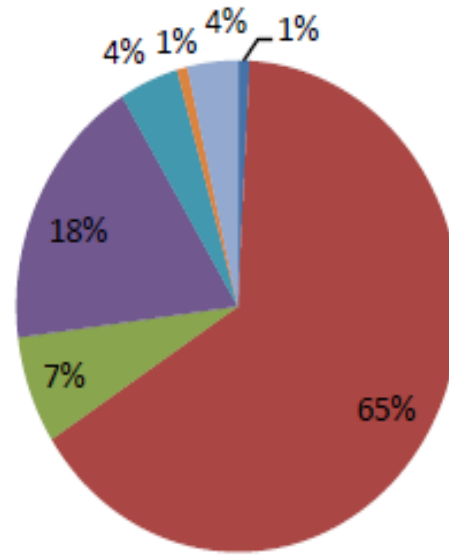


National Energy Balance – Reference Scenario 2020-2030

Ενεργειακό Ισοζύγιο, Σενάριο Αναφοράς 2020



Ενεργειακό Ισοζύγιο, Σενάριο Αναφοράς 2030



- Στερεά Καύσιμα
- Πετρελαϊκά Προϊόντα
- Φ.Αέριο (εκτός ηλεκτροπαραγωγής)
- Ηλεκτρισμός
- Βιομάζα
- Ηλιακοί Θερμοσίφωνες
- βιοκαύσιμα

Anticipated Energy Investments in Greece 2010 - 2020

Sector	Installed Capacity	Investments (in billion Euros)
Electricity Thermal Plants (CCP, Lignite & Lignite field development)	6.000 MW	5.0
RES Wind + Solar	Wind = 6.000 MW Thermal & P/V = 2.000 MW	9.0 5.0
RES Small & Large Hydro Biomass, Waste, Geothermal	Small & Large Hydro = 1.200 MW Other = 800 MW	2.0
Oil & Gas Production – Refining - Transportation	Production 200.000 B/d Refining 120.000 B/d	5.0
Uranium Production	-	0.5
Electricity Networks	-	5.0
Main Gas Pipelines & City Networks	2.000 Kms	3.5
Total Anticipated Investments		35.0