

External dimension of the European Energy Policy

-

I. part

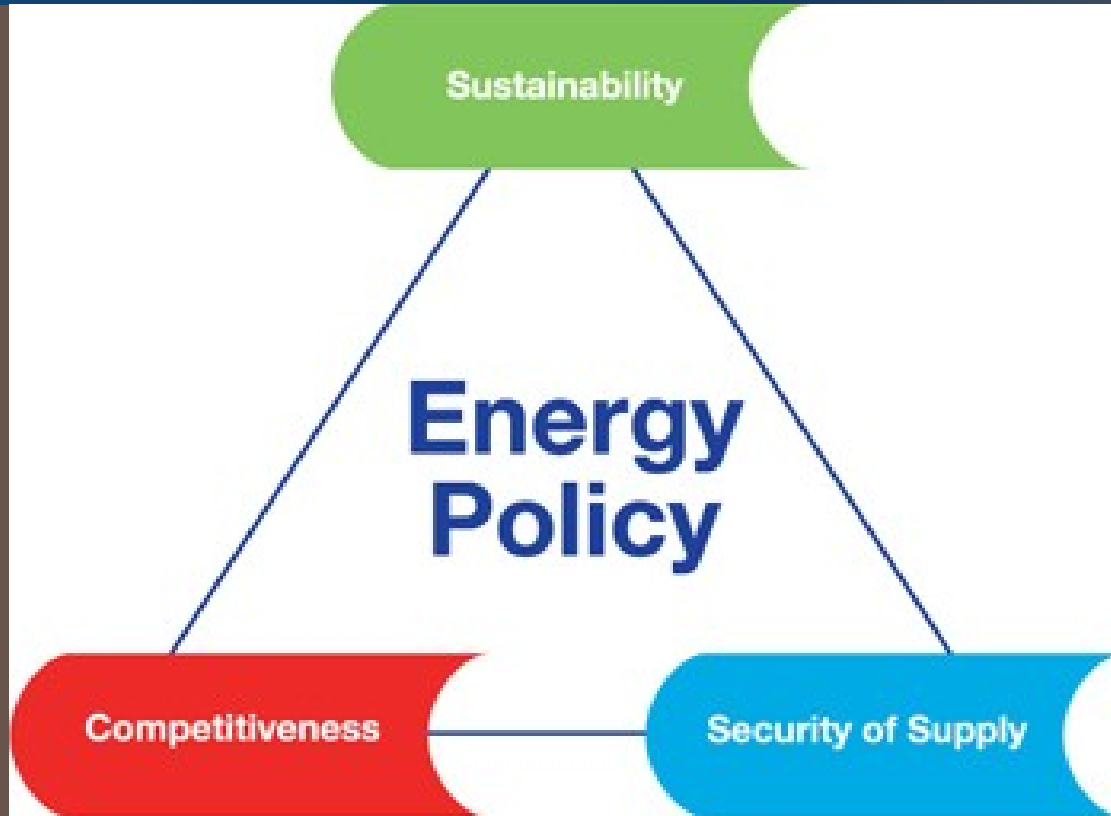
2. 4. 2014

EXTERNAL DIMENSION OF THE EEP – I. PART

Summary of the lecture

- Introduction
- External dimension of the EU Energy Policy ...what does it mean?
- Aims, characteristics, main strategies of the ED EEP
- Instruments of the ED EEP

External dimension of the EU Energy Policy ...what does it mean?



- Internal vs. external dimension

Aims, characteristics of the ED EEP

□ Energy supply- production

Mtoe	1995	2000	2005	2009	2010	2011
EU-27	957.7	942.9	899.5	819.3	837.5	807.2
Index 1995	100%	98%	94%	86%	87%	84%
BE	11.83	13.61	13.71	15.64	16.41	18.31
BG	10.27	9.87	10.62	9.78	10.54	12.30
CZ	32.41	30.64	32.87	31.17	31.56	32.01
DK	15.63	27.72	31.31	23.99	23.35	21.20
DE	145.08	135.46	136.58	127.95	131.98	124.90
EE	3.73	3.43	4.24	4.65	5.46	5.61
IE	4.10	2.16	1.64	1.53	1.95	1.81
EL	9.36	10.01	10.32	10.10	9.47	9.62
ES	31.43	31.49	30.09	30.14	34.14	31.90
FR	126.98	129.81	135.86	128.22	134.75	135.40
IT	29.80	28.31	28.12	27.86	30.88	32.54
CY	0.04	0.04	0.05	0.09	0.09	0.10
LV	1.43	1.41	1.86	2.10	2.12	2.08
LT	3.76	3.25	3.87	4.17	1.32	1.30
LU	0.04	0.06	0.11	0.11	0.12	0.12
HU	13.92	11.60	10.33	11.04	11.09	10.81
MT					0.00	0.00
NL	66.70	57.58	62.23	63.44	70.10	64.69
AT	8.78	9.78	9.97	11.59	12.23	11.57
PL	99.38	79.79	78.90	67.90	67.83	68.87
PT	3.38	3.89	3.61	4.97	5.63	5.35
RO	32.67	28.55	28.24	28.64	27.77	27.86
SI	2.96	3.09	3.49	3.65	3.72	3.75
SK	5.06	6.39	6.68	6.06	6.32	6.55
FI	13.12	14.82	16.59	16.68	17.51	17.23
SE	31.38	30.05	34.26	30.02	33.17	32.17
UK	254.51	270.14	203.95	157.80	147.98	129.16

Aims, characteristics of the ED EEP

□ Net imports - By Fuels

Mtoe	2011					
	Net Imports	Petroleum and Products	Gases	Solid Fuels	Renewables	Electricity
EU-27	939.7	548.5	266.3	118.1	6.7	0.0
Share (%)	100 %	58 %	28 %	13 %	1 %	0 %
BE	48.43	29.67	15.21	2.95	0.39	0.22
BG	7.09	3.84	2.26	1.98	-0.08	-0.92
CZ	12.07	8.64	7.51	-2.57	-0.04	-1.47
DK	-1.67	-3.95	-2.47	3.59	1.04	0.11
DE	194.86	106.85	56.70	31.71	-0.07	-0.32
EE	0.74	0.70	0.50	-0.02	-0.14	-0.31
IE	12.40	7.04	3.83	1.40	0.08	0.04
EL	20.00	15.36	3.97	0.23	0.16	0.28
ES	104.77	66.28	29.40	8.74	0.87	-0.52
FR	127.91	83.93	38.27	10.18	0.37	-4.85
IT	142.61	63.79	57.53	15.29	2.07	3.93
CY	2.65	2.62		0.00	0.03	
LV	2.63	1.51	1.41	0.12	-0.56	0.11
LT	5.90	2.39	2.73	0.26	-0.06	0.58
LU	4.46	2.94	1.03	0.06	0.04	0.39
HU	13.13	5.35	6.13	1.04	0.03	0.57
MT	2.50	2.50				
NL	29.18	44.18	-23.54	7.53	0.21	0.78
AT	23.53	11.23	8.00	3.05	0.54	0.70
PL	34.53	25.46	9.64	-0.62	0.51	-0.45
PT	18.94	12.24	4.53	2.15	-0.22	0.24
RO	7.76	4.26	2.46	1.13	0.08	-0.16
SI	3.53	2.61	0.74	0.26	0.03	-0.11
SK	11.18	3.24	4.86	3.02	-0.01	0.06
FI	19.32	10.21	3.36	4.60	-0.04	1.19
SE	18.77	15.89	1.15	2.35		-0.62
UK	72.44	19.73	31.01	19.66	1.51	0.53

Aims, characteristics of the ED EEP

Imports (by country of origin) EU-27 – Hard Coal

kton	1995	2000	2005	2009	2010	2011
Russia	8 794	14 953	48 452	54 939	47 639	52 013
Colombia	11 161	22 586	24 236	32 059	35 568	47 617
United States	41 058	20 599	15 736	24 878	30 432	36 064
Australia	19 533	28 608	27 119	13 865	19 251	17 714
South Africa	32 091	41 573	51 631	29 144	17 553	15 902
Indonesia	3 403	9 102	13 131	12 260	9 887	10 281
Not Specified	6 680	5 229	3 358	4 647	6 846	8 066
Canada	4 237	6 378	6 642	2 624	3 637	4 461
Ukraine	348	2 045	4 156	2 914	3 094	4 348
Norway	329	928	1 124	1 502	1 385	1 152
Venezuela	2 821	3 621	2 003	1 313	685	1 083
Kazakhstan	262	0	932	338	332	588
China (except Hong Kong)	2 443	1 853	526	640	61	119
Mozambique	0	107	0	0	0	99
Bosnia and Herzegovina	0	0	0	8	24	35
Other	344	606	1 958	825	745	48

kton						
Total Extra-EU	133 504	158 188	201 004	181 956	177 139	199 590
Intra-EU	30 068	31 119	26 478	19 973	22 356	18 864
Total with Intra-EU	163 572	189 307	227 482	201 929	199 495	218 454

Aims, characteristics of the ED EEP

- Imports (by country of origin) EU-27 – Crude Oil and NGL

kton	1995	2000	2005	2009	2010	2011
Russia	76 319	118 229	188 079	173 519	180 654	177 085
Norway	102 203	115 904	97 610	80 042	73 078	65 254
Saudi Arabia	82 419	65 143	60 748	29 809	30 774	41 108
Nigeria	28 597	22 407	18 618	23 554	21 918	31 221
Kazakhstan	78	9 915	26 386	28 522	29 705	29 878
Iran	52 467	35 475	35 611	26 234	29 679	29 495
Azerbaijan	0	3 712	7 255	20 656	21 673	24 615
Iraq	0	31 250	12 290	19 828	16 952	18 197
Algeria	17 031	21 417	22 776	11 406	8 256	14 967
Libya	47 978	45 542	50 601	48 108	53 754	14 614
Angola	4 756	3 862	7 065	14 083	8 483	10 926
Other African countries	143	3 035	5 299	7 186	5 314	7 718
Mexico	7 246	9 770	10 647	5 996	6 783	7 192
Egypt	6 950	5 579	1 716	5 141	4 654	5 866
Syria	14 984	13 259	9 027	6 842	7 738	4 808
Other	64 418	35 642	26 817	29 969	28 080	33 051

kton						
Total Extra-EU	505 589	540 141	580 545	530 895	527 495	515 995
Intra-EU	50 291	61 651	48 270	36 287	39 637	33 508
Total with Intra-EU	555 880	601 792	628 815	567 182	567 132	549 503

Mio barrels						
Total Extra-EU	3 707	3 960	4 256	3 892	3 867	3 783
Intra-EU	369	452	354	266	291	246
Total with Intra-EU	4 075	4 412	4 610	4 158	4 158	4 029

Aims, characteristics of the ED EEP

Imports (by country of origin) EU-27 – Natural Gas

TJ (GCV)	1995	2000	2005	2009	2010	2011
Russia	4 234 713	4 539 709	5 099 721	4 528 271	3 992 749	4 101 546
Norway	1 159 830	1 921 081	3 063 749	4 058 381	3 911 661	3 715 398
Algeria	1 362 649	2 203 075	2 256 826	1 867 044	1 986 351	1 767 006
Qatar	0	12 443	195 713	723 595	1 374 583	1 485 596
Not Specified	58 588	332 289	782 285	723 359	1 252 442	1 392 231
Nigeria	0	172 020	436 319	316 251	576 077	589 290
Egypt	0	0	202 419	277 799	186 284	158 134
Trinidad and Tobago	0	36 334	29 673	294 610	205 267	140 996
Other	101 764	82 524	482 797	546 397	447 432	172 136
Total Extra-EU	6 917 544	9 299 475	12 549 502	13 335 707	13 932 846	13 522 333
Intra-EU	1 451 229	1 933 316	2 218 105	2 530 713	2 824 223	2 844 273
Total with Intra-EU	8 368 773	11 232 791	14 767 607	15 866 420	16 757 069	16 366 606

Mio m ³	1995	2000	2005	2009	2010	2011
Russia	111 860	119 638	134 973	120 048	104 941	107 018
Norway	28 929	47 813	78 217	103 896	100 952	96 228
Algeria	33 698	55 607	57 075	47 072	50 340	44 678
Qatar	0	309	4 859	18 185	34 636	37 595
Not Specified	1 473	8 126	19 724	17 900	31 923	35 850
Nigeria	0	4 385	10 586	7 745	14 015	14 372
Egypt	0	0	4 929	6 804	4 616	3 893
Trinidad and Tobago	0	902	751	7 314	5 111	3 503
Other	2 537	2 102	12 479	14 102	11 665	4 457
Total Extra-EU	178 497	238 882	323 593	343 066	358 199	347 594
Intra-EU	41 164	54 116	61 479	69 725	74 120	74 568
Total with Intra-EU	219 661	292 998	385 072	412 791	432 319	422 162

Aims, characteristics of the ED EEP

Import Dependency – All Fuels

%	1995	2000	2005	2009	2010	2011
EU-27	43.2	46.7	52.4	53.8	52.6	53.8
Index 1995	100	108	121	124	122	125
BE	80.9	78.1	80.1	74.3	76.8	72.9
BG	57.2	46.5	47.5	45.3	40.1	36.6
CZ	20.6	23.0	28.3	27.1	25.6	27.9
DK	33.3	-35.3	-50.9	-20.4	-16.9	-8.5
DE	56.8	59.5	61.2	61.5	59.8	61.1
EE	32.4	32.0	25.4	21.4	13.1	11.7
IE	69.2	84.6	89.3	88.2	85.6	88.9
EL	66.7	69.5	68.6	67.8	69.1	65.3
ES	71.7	76.7	81.4	79.2	76.8	76.4
FR	48.0	51.6	51.7	51.0	49.1	48.9
IT	82.0	86.5	84.4	82.8	83.8	81.3
CY	100.4	98.6	100.7	96.3	100.7	92.4
LV	70.4	59.7	63.0	58.8	41.6	59.0
LT	63.4	59.8	57.0	50.3	82.0	81.8
LU	97.7	99.6	97.3	97.4	97.0	97.2
HU	48.0	55.2	63.2	58.7	58.3	52.0
MT	104.8	100.3	100.0	101.1	99.1	100.6
NL	18.3	38.7	38.4	36.5	30.7	30.4
AT	66.6	65.6	71.4	65.0	62.1	69.3
PL	0.0	10.6	17.6	31.7	31.6	33.7
PT	85.4	84.9	88.5	81.0	75.4	77.4
RO	30.8	22.0	27.6	20.2	21.7	21.3
SI	50.8	52.6	52.3	48.1	49.4	48.4
SK	68.9	65.0	65.4	66.4	63.0	64.2
FI	53.9	55.3	54.2	54.0	48.3	53.8
SE	37.6	39.2	37.7	37.1	36.7	36.8
UK	-16.2	-17.0	13.4	26.2	28.1	36.0

Aims, characteristics of the ED EEP

Import Dependency – Hard Coal

%	1995	2000	2005	2009	2010	2011
EU-27	29.7	42.4	55.6	62.5	58.2	62.1
Index 1995	100	143	187	210	196	209
BE	108.5	90.4	100.9	83.7	100.2	103.0
BG	73.0	100.5	94.8	93.6	88.2	102.9
CZ	-34.2	-56.1	-49.4	-79.1	-58.0	-47.8
DK	118.0	94.8	94.3	98.1	69.3	111.1
DE	17.1	39.2	57.3	72.4	77.3	80.6
EE	102.4	116.1	96.4	34.5	118.3	95.7
IE	105.9	93.2	100.8	111.7	79.3	111.1
EL	95.2	105.8	112.4	78.6	100.5	102.1
ES	48.5	66.8	74.4	85.0	85.9	70.3
FR	58.0	87.3	92.9	94.0	100.6	98.8
IT	105.6	105.7	99.7	97.5	101.5	96.0
CY	100.0	102.0	121.2	123.8	65.4	
LV	92.9	82.5	96.7	93.8	106.6	102.1
LT	69.1	100.0	102.5	82.6	95.2	111.5
LU	100.0	100.0	100.0	100.0	100.0	100.0
HU	103.5	99.0	105.1	96.8	99.5	95.7
MT						
NL	97.4	101.5	100.3	126.1	122.3	101.4
AT	88.3	91.6	106.9	95.3	97.5	82.3
PL	-31.7	-29.9	-21.3	1.9	3.7	8.6
PT	105.9	103.4	96.3	106.8	98.3	97.3
RO	81.7	96.0	102.2	86.2	100.8	96.7
SI	100.0	100.6	93.7	86.5	101.4	93.3
SK	92.9	103.8	105.2	100.7	91.9	98.0
FI	89.0	97.7	102.6	109.8	85.5	126.2
SE	101.5	107.7	104.3	77.6	115.2	101.0
UK	21.8	39.4	71.5	77.7	51.4	63.7

Aims, characteristics of the ED EEP

Import Dependency – petroleum and products

%	1995	2000	2005	2009	2010	2011
EU-27	74.3	75.7	82.2	83.2	84.1	84.9
Index 1995	100	102	111	112	113	114
BE	99.6	100.2	100.8	95.4	98.0	98.7
BG	99.6	95.6	101.9	101.3	100.8	97.7
CZ	97.9	95.3	97.5	96.6	96.3	95.0
DK	11.0	-81.1	-103.9	-60.4	-45.7	-48.7
DE	95.8	94.5	97.0	95.2	95.8	94.2
EE	80.4	77.2	69.4	64.7	56.3	55.6
IE	100.2	98.8	99.7	99.2	97.5	101.7
EL	98.4	100.2	97.7	96.7	98.5	94.5
ES	101.5	101.0	101.2	98.9	99.9	99.8
FR	96.9	99.5	99.4	97.6	97.7	98.0
IT	93.3	96.0	91.7	91.2	92.7	90.2
CY	102.6	100.3	102.3	98.9	104.2	95.8
LV	102.6	94.3	102.4	99.4	93.6	103.2
LT	114.1	100.1	92.0	90.1	98.7	91.6
LU	98.3	102.1	99.4	100.1	99.4	99.6
HU	71.1	76.0	81.3	77.6	84.2	82.3
MT	104.8	100.3	100.0	101.1	99.3	100.6
NL	84.8	99.8	97.1	97.1	93.4	91.5
AT	89.3	89.1	91.6	90.4	88.6	90.4
PL	96.0	98.7	97.4	98.3	96.7	95.5
PT	100.6	99.3	102.3	99.0	98.0	99.9
RO	49.2	34.6	38.1	51.1	51.7	46.6
SI	97.8	101.5	101.3	98.3	100.5	99.5
SK	100.7	89.7	88.4	88.0	88.9	90.2
FI	94.7	101.9	96.4	96.5	89.3	97.2
SE	95.3	100.8	103.8	101.8	93.7	98.6
UK	-57.1	-54.6	-3.1	7.6	14.5	26.8

Aims, characteristics of the ED EEP

Import Dependency – Crude and NGL

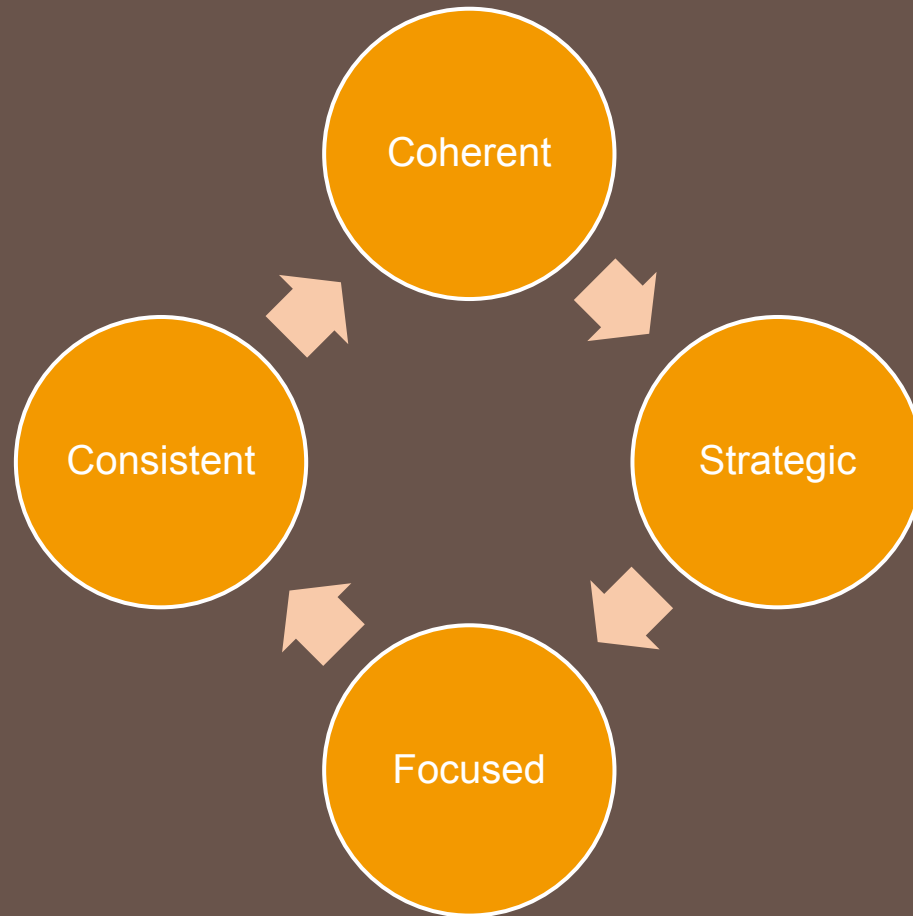
%	1995	2000	2005	2009	2010	2011
EU-27	73.2	74.4	81.4	83.5	84.7	85.6
Index 1995	100	102	111	114	116	117
BE	99.8	100.2	99.5	99.7	99.9	100.3
BG	99.7	98.7	97.7	98.6	99.1	98.2
CZ	100.2	95.3	99.3	97.2	97.5	97.3
DK	6.3	-120.5	-141.3	-65.0	-68.8	-62.8
DE	96.9	93.8	97.3	96.9	97.0	96.3
EE						
IE	100.2	89.8	98.9	95.7	101.6	100.7
EL	98.8	99.5	95.2	98.0	99.5	96.5
ES	99.1	100.6	100.1	99.3	99.3	99.7
FR	95.8	98.5	98.2	98.2	98.2	97.9
IT	92.8	95.1	94.0	94.6	94.5	91.8
CY	96.3	98.5				
LV						
LT	99.5	94.5	95.3	98.4	99.0	98.3
LU						
HU	72.0	78.6	81.2	80.8	85.3	85.6
MT						
NL	93.8	97.7	96.7	97.9	97.6	95.9
AT	87.6	87.0	88.5	88.0	86.2	88.1
PL	97.1	99.1	97.3	98.0	98.4	97.2
PT	100.0	99.0	100.2	98.7	98.9	100.7
RO	54.9	43.5	61.3	61.0	56.5	55.0
SI	95.9	86.9				
SK	101.5	97.6	97.7	99.8	99.9	100.2
FI	94.1	101.5	97.5	98.2	101.1	98.9
SE	99.3	100.6	100.4	98.3	99.0	100.5
UK	-47.7	-48.0	-0.2	7.7	12.7	28.6

Aims, characteristics of the ED EEP

Import Dependency – Natural gas

%	1995	2000	2005	2009	2010	2011
EU-27	43.5	48.9	57.7	64.3	62.4	67.0
Index 1995	100	112	133	148	143	154
BE	98.2	99.3	100.6	99.0	99.0	100.1
BG	99.5	93.5	87.7	98.6	92.6	86.1
CZ	98.0	99.8	97.8	104.6	85.2	110.8
DK	-47.2	-64.8	-113.9	-91.9	-68.3	-66.3
DE	78.6	79.1	81.3	87.9	81.9	86.1
EE	100.0	100.0	100.0	100.0	100.0	100.0
IE	3.6	72.1	86.7	92.5	93.4	93.1
EL		99.1	99.1	99.7	99.9	100.0
ES	97.4	101.6	101.4	98.9	99.4	101.4
FR	93.0	100.0	99.3	100.9	93.0	103.3
IT	63.9	81.1	84.7	88.6	90.5	90.2
CY						
LV	99.0	101.9	105.6	114.1	61.8	109.4
LT	100.0	100.0	100.6	100.4	99.7	100.3
LU	100.0	100.0	100.0	100.0	100.0	99.9
HU	60.3	75.4	81.1	85.6	78.7	65.6
MT						
NL	-76.4	-49.1	-59.3	-61.2	-61.6	-68.6
AT	84.8	80.6	87.7	85.8	74.4	103.2
PL	64.6	66.3	69.7	67.3	69.3	75.1
PT		100.3	103.8	101.2	100.4	101.6
RO	24.9	19.8	30.1	15.1	16.8	22.2
SI	100.6	99.3	99.6	99.7	99.3	99.8
SK	86.8	98.8	97.5	108.6	99.9	104.8
FI	100.0	100.0	100.0	100.0	100.0	100.0
SE	100.0	100.0	100.0	100.0	100.0	100.0
UK	1.0	-10.7	7.0	31.6	37.7	44.2

Aims, characteristics of the ED EEP





Strategies of the ED EEP

- Widening the regulatory net of the European energy market
- Dialogue with third parties – compensating for the EU „hard power“ deficit with cultivating „soft power“?
- Promotion of new infrastructure for supply diversification

Thank you for your attention

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