



• Vol.26

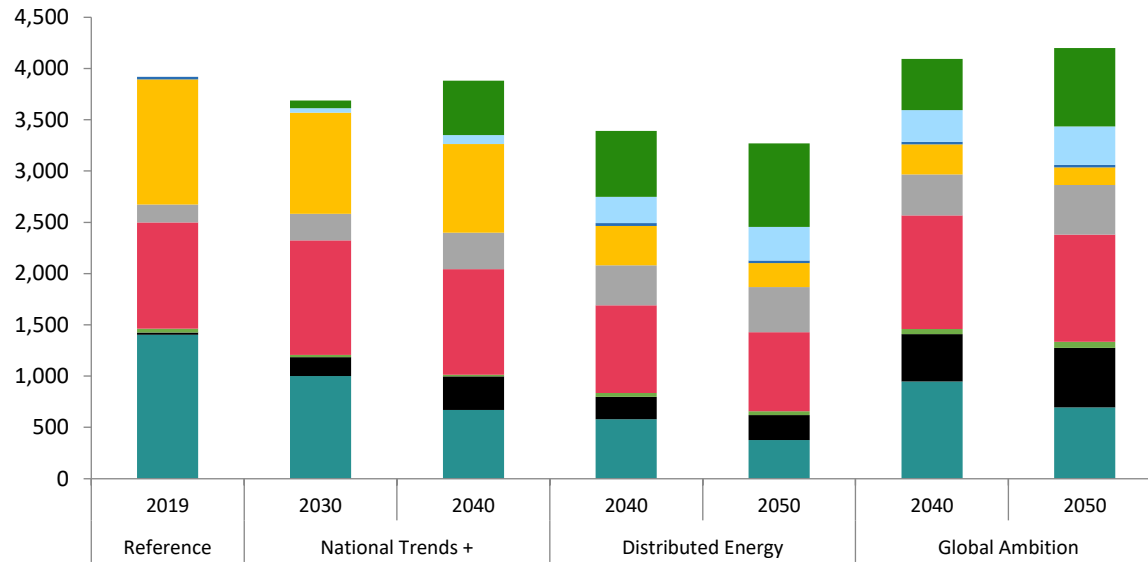
A Glimpse into the Future Landscape of Gas and Hydrogen



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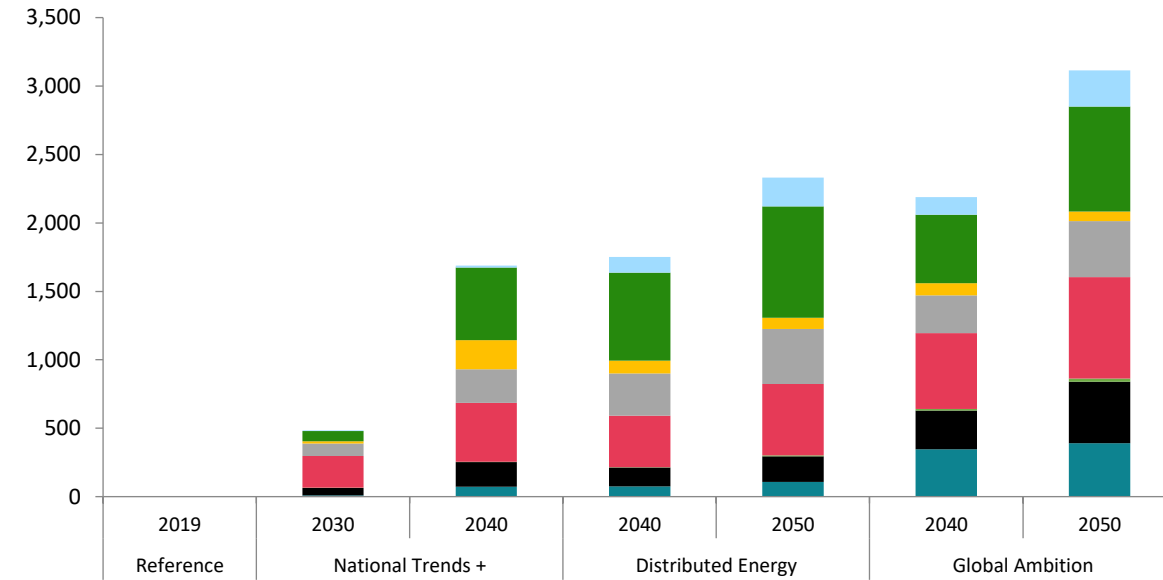
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Gas demand (methane and hydrogen) per sector, EU27 (TWh)



- Residential&Tertiary
- Industry
- Transport
- Non-energy use
- Agriculture
- Power Generation
- International maritime bunkers
- e-fuels

Hydrogen demand per sector, EU27 (TWh)

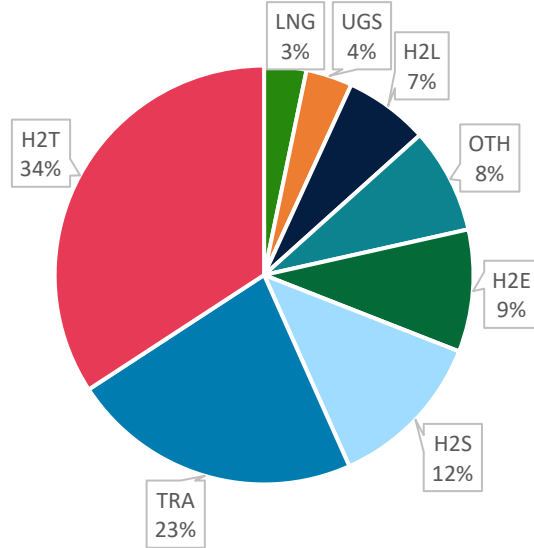


- Residential&Tertiary
- Industry
- Transport
- Non-energy use
- Agriculture
- Power Generation
- International maritime bunkers
- e-fuels
- Total

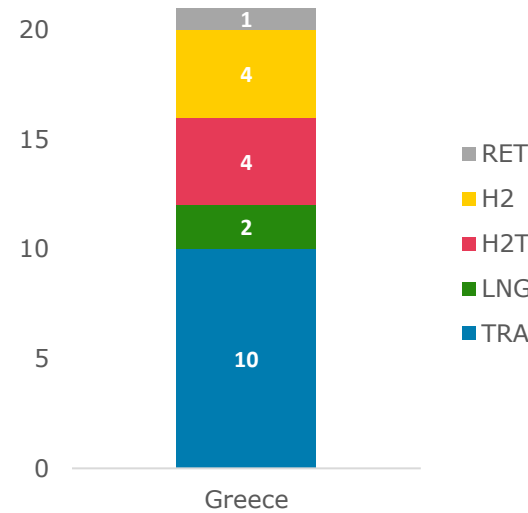
It is evident from all scenarios that **gas demand will continue to exist in the upcoming decades, while hydrogen is expected to play a major role** in the future energy system.

The decarbonization of gas market and the scale up of green hydrogen is crucial for the goals of Net-Zero, to ensure a competitive, resilient, and reliable energy system.

Distribution of Types of Projects included in the TYNDP, EU27



Distribution of Types of Projects included in the TYNDP, Greece



Term	Definition
TRA	Gas transmission pipeline
LNG	Liquefied natural gas (LNG) or compressed natural gas (CNG)
UGS	Underground storage facilities
H2T	Hydrogen transmission pipelines
H2L	Hydrogen reception facilities
H2	Other Hydrogen related projects
H2S	Hydrogen storage facilities
H2E	Electrolysers for hydrogen production
RET	Projects for retrofitting infrastructure to further integrate hydrogen
OTH	Other infrastructure related projects

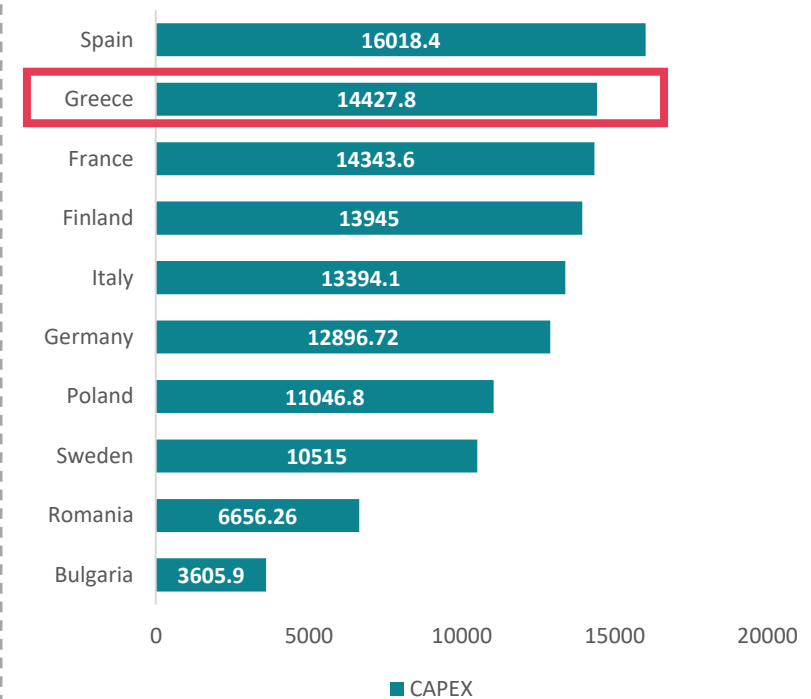
The majority of projects for EU27 are focused on **Gas and Hydrogen transmission pipelines**, with **174 projects**.

The same applies for Greece with **14 out of the 21 projects** focusing on the same categories, thus highlighting the **urging need and importance of infrastructure development** in upcoming years.

Greece, ranks second in under development projects estimated in terms of **CAPEX amounting to 14.43 billion €**, for the upcoming decade.

This highlights the role that **Greece** puts on the goal of **becoming an energy hub** supplying the rest of Europe.

Top 10 Countries by estimated CAPEX (mil. €) in Projects



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