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Italy – Gas destination or gas conduit?

As the decline of the Italian gas market continues without abatement there is a growing, and seemingly incongruous political pressure to invest in new gas infrastructure. Over-supply is likely to continue to visual_editor0visual_editor0, by which time several long-term supply contracts will begin to expire. And while governments seek to diversify away from Russian supply, paradoxically the share of gas from Gazprom increased markedly in visual_editor013. The situation is full of contradictions – in some measure a result of constantly changing governments, but also muddled thinking and discord between central and regional governments. Major investment in ‘strategic’ gas infrastructure is being called for not only by the EU but also by the US, and – a little reluctantly at first but now with enthusiasm – the new government headed up by Prime Minister Matteo Renzi. At least one new LNG import terminal, along with the TAP pipeline, which will bring gas from the Caspian, are on the cards. But where will the gas go? Can it stay in Italy, or will the ‘hub’ concept become a reality? Gas Strategies investigates the future Italian supply picture.

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