For the past 18 years, leading industry players have relied on Global Insight’s EUROPEAN GAS SUPPLY AND DEMAND SERVICE to assess the key factors influencing current and future gas supply and demand across Europe. The service’s annual study provides in-depth analytical profiles for 31 Western and Central European countries. In addition, the macroeconomic context and analysis of the aggregate European market are included in a European Overview section.
KEY ISSUES THIS YEAR
Energy supply security tops the European policy agenda. If a nationalistic, self-sufficiency argument wins, gas has much to lose. An EU-wide approach, focused on greater upstream-downstream integration with the EU’s neighbours, could improve security and provide a bigger role for gas. Other key issues facing the industry and covered in the Country Profiles and Overview report include:

- **Market Concentration**: This remains an issue with the European markets that are dominated by a few large players
- **Gas-to-Gas-Pricing**: These could emerge in the medium-to-long term as market hubs and liquid spot markets develop
- **Gas to Power**: The majority of growth is still expected to come from the power sector, but concerns are growing about competition from coal
- **Gas Imports**: Expected to grow from about 45% of supplies currently to 75% by 2030
- **Russian Supplies**: Heavy investments will be needed to replace the two super-giant fields currently underpinning supplies

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More than an annual report, the European Gas Supply and Demand Service provides subscribers with ongoing analysis throughout the year of the economic, policy, and environmental issues impacting the industry. Annual subscription membership includes:

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KEY ISSUES THIS YEAR

Energy security of supply tops the European policy agenda. If a nationalistic, self-sufficiency argument wins out, gas has much to lose. An EU-wide approach, focussed on greater upstream-downstream integration with the EU’s near neighbours, could improve security and provide a bigger role for gas. Other key issues facing the industry and covered in the Country Profiles and Overview report include:

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2006 STUDY DETAILS

**Country Profiles**

31 country profiles are covered in the service. Each country profile includes an in-depth, historical review of demand, supply, and price across residential, commercial, industrial, industrial feedstock, and power sectors. This contextual background provides gas industry executives and managers with a solid basis for interpreting Global Insight's valuable market analysis and forecasts. The 31 individual country profiles highlight:

- Recent trends in demand and supply
- New contracts, infrastructure developments, and new power station projects
- Historical gas sector pricing
- Environmental topics and policy issues
- Demand forecasts
- Existing gas contracted: the supply gap and how it is likely to be filled
- Power generation: growth in electricity demand and changes in the fuel mix

**European Overview**

This 90 page supplemental report provides analysis and summaries of issues impacting the overall European market. Key issues examined include:

- Security of supply
- European liberalisation and the gas directive
- Overall supply and demand trends
- The emerging supply gap and its implications for the region
- The Atlantic market for LNG trade

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Global Insight, Inc., formerly DRI-WEFA, provides the most comprehensive economic coverage of countries, regions and industries available from any source. The company has over 3,800 clients in industry, finance and government around the world with 23 offices in 12 countries covering North and South America, Europe, Africa, the Middle East and Asia.

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A PROVEN TRACK RECORD
Global Insight’s focus on quantitative analysis, combined with the company’s core resources and strengths in economic forecasting, has made its European Gas Supply and Demand Service the recognised industry standard by many leading gas market players. Gas industry executives, managers, and planners rely on Global Insight for the comprehensive, timely, and objective analysis they need to:

- Identify market opportunities and risks
- Anticipate the impact of policy and institutional changes across Europe and within individual countries
- Determine immediate and long-term goals for business development initiatives

ABOUT GLOBAL INSIGHT’S ENERGY GROUP
Global Insight’s Energy Group, based in London and Boston, is a premier multi-fuel consultancy. A group of over 40 full-time consultants, analysts, and business development staff provides a wide range of subscription and consultancy services on the markets, prices, and costs for the oil, gas, coal, and power sectors. Our authoritative energy sector forecasts and integrated multi-fuel approach ensure a solid and independent basis for our client’s marketing, planning, and business development decisions. Industry experience, a continual program of research visits, and Global Insight’s economic expertise form the foundation of our expert forecasting and detailed understanding of industry fundamentals.

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For more information, including a sample chapter, go to www.globalinsight.com/gas-sd.