

Global Gas Deregulation

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What's in this report and analysis?

- Overview of the state of the gas sector
- World Survey of Gas Privatisation and Deregulation
- Coverage of Gas privatisation and deregulation at the country and regional-level

NRG Expert Market Intelligence Report Highlights:

Natural gas deregulation – onwards and upwards

Carbon reduction commitments and low gas prices relative to other fossil fuels have made natural gas more attractive for power generation and transportation. Overall consumption of natural gas has been growing worldwide. In emerging economies such as China and India domestic supply has not been able to meet growth in demand.

Private sector involvement and deregulation

To meet the growing demand for natural gas and increase coverage, private sector involvement is expected to increase.

Europe and the CIS

Full market opening in the EU has taken place in all of the original 15 EU member states, except Greece and Portugal, which reported 86% and 94% market opening respectively. Of the new ascension countries, most markets are open, except Hungary, which reported gas market opening of 48%.

The natural gas sector is largely state-owned in the CIS, with indications of gradual market opening. In December 2010, the Russian government adopted Regulation 1205 which plans for a step-by-step liberalisation of the market through a transitional period from 2011 to 2014.

Americas

The North American gas markets are partially deregulated. In South America the market is less deregulated. Recently the Argentinian government expropriated YPF SA, a subsidiary of the Spanish oil and gas company, Repsol YPF SA.

Asia and Australasia

There has been gradual reform of the natural gas market in some countries, but remains largely in the hands of the state. The use of natural gas has been increasing in the region, especially in China and India, where domestic production has not kept pace with demand, and in South Korea and Japan, which are highly reliant on energy imports.

Middle East

In the Middle East, the natural gas industry is largely state-owned.

Africa

The natural gas industry is largely state-owned in Africa, and is mainly concentrated in the North African countries.

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Table of Contents

1. Executive Summary	8
Overview	8
2. The gas sector	19
Overview	19
3. World survey of gas privatisation and deregulation.....	24
4. Europe	29
Overview	29
Western Europe.....	41
Austria.....	41
Belgium.....	47
Cyprus	52
France.....	53
Germany.....	62
Greece	68
Ireland.....	71
Italy	75
Luxembourg.....	83
Malta	84
Netherlands	85
Portugal	91
Spain.....	96
Switzerland	103
Turkey.....	106
United Kingdom	107
Nordic Countries.....	117
Denmark	117
Finland	122
Norway.....	128
Sweden.....	131
Central Europe	134
Bosnia Herzegovina	134
Bulgaria.....	134
Croatia	135
Czech Republic	136
Hungary	141
Macedonia	146
Poland.....	146
Romania	151
Serbia	156
Slovak Republic.....	156
Slovenia	159
The Baltic States	163
Overview.....	163
Estonia.....	165
Latvia	168
Lithuania	171
5. CIS.....	174

Armenia	174
Azerbaijan.....	174
Belarus.....	177
Georgia	178
Kazakhstan	179
Kyrgyzstan	182
Moldova	182
Russia.....	183
Tajikistan.....	194
Turkmenistan.....	195
Ukraine	197
Uzbekistan.....	202
6. Southeast Asia (ASEAN)	203
Developed Economies.....	203
Japan	203
Korea, South.....	208
Taiwan	212
Developing Economies.....	215
China	216
Brunei	224
Indonesia	225
Malaysia.....	228
Myanmar.....	230
Philippines	231
Singapore	233
Thailand.....	237
Vietnam.....	239
7. Indian Sub-Continent	241
Bangladesh.....	241
India	244
Pakistan	253
8. Asia Pacific	256
Australia.....	257
New Zealand.....	268
Papua New Guinea	275
9. North America	276
Overview.....	276
United States	278
Canada	295
Mexico	304
10. South America and the Caribbean	307
Overview.....	307
Argentina	308
Bolivia	311
Brazil.....	314
Chile.....	319
Colombia.....	321
Dominican Republic.....	323
Ecuador	323

Peru	324
Puerto Rico	325
Trinidad and Tobago	325
Uruguay	326
Venezuela.....	327
11. Middle East	329
Bahrain	329
Iran.....	330
Iraq.....	332
Israel	332
Jordan.....	332
Kuwait	332
Lebanon.....	332
Oman	333
Qatar.....	334
Saudi Arabia	336
Syria.....	337
United Arab Emirates	338
Yemen	338
12. Africa.....	339
Overview	339
Algeria.....	339
Angola.....	340
Egypt.....	341
Equatorial Guinea.....	343
Ghana	343
Libya	343
Morocco	344
Nigeria	345
South Africa	346
Tunisia	347
13. Glossary.....	348
14. Sources.....	355

Figures

Figure 4-1: Production, imports, exports, consumption of natural gas in Europe, bcm, 2010	30
Figure 4-2: Consumption of natural gas by region, bcm, 1965 to 2010	32
Figure 4-3: Gas and electricity consumption in the EU, 2010	34
Figure 4-4: European gas pipeline network and LNG terminals, 2011	38
Figure 4-5: The extent of market opening in the EU 15, 2004, 2006 and 2010	39
Figure 4-6: The extent of market opening in other European countries, 2004, 2006 and 2007	40
Figure 4-7: The extent of market opening in the EU 15 and other European countries, 2009	40
Figure 9-1: Canadian and US Natural Gas Pipelines	277
Figure 9-2: Over half the states have started residential restructuring programmes	282
Figure 9-3: Natural gas residential choice programmes by state as of December 2009	287
Figure 9-4: Canadian natural gas supply and disposition, bcf per day, 2010	297
Figure 9-5: Natural gas pipelines in Canada as of June 2011	298
Figure 9-6: CEPA member pipeline projects proposed and under construction as of February 2011	298

Tables

Table 2-1: The countries producing and consuming natural gas, bcm, 2010	19
Table 2-2: Uses of natural gas for domestic non-export consumption.....	22
Table 3-1: World survey of gas privatisation and deregulation	24
Table 4-1: Principal Natural Gas Companies of Austria.....	46
Table 4-2: Principal Natural Gas Companies of Belgium	51
Table 4-3: Principal Natural Gas Companies of France.....	60
Table 4-4: Principal Natural Gas Companies of Germany	67
Table 4-5: Principal Natural Gas Companies of Greece	70
Table 4-6: Principal Natural Gas Companies of Ireland	74
Table 4-7: Timetable for Italian deregulation enacted in the Decree of 23 May, 2000	77
Table 4-8: Principal Natural Gas Companies of Italy	82
Table 4-9: Natural gas statistics for Luxembourg.....	83
Table 4-10: Principal Natural Gas Companies of Netherlands	90
Table 4-11: Principal Natural Gas Companies of Portugal	95
Table 4-12: Principal Natural Gas Companies of Spain.....	102
Table 4-13: Natural gas statistics for Switzerland	105
Table 4-14: Natural gas statistics for Turkey.....	106
Table 4-15: The chronology of the privatisation of British Gas	108
Table 4-16: Principal Natural Gas Companies of United Kingdom	116
Table 4-17: Principal Natural Gas Companies of Denmark	121
Table 4-18: Natural gas statistics for Finland	127
Table 4-19: Principal Natural Gas Companies of Sweden	133
Table 4-20: Natural gas statistics for Bulgaria.....	134
Table 4-21: Principal Natural Gas Companies of the Czech Republic.....	140
Table 4-22: Principal Natural Gas Companies of Hungary	145
Table 4-23: Principal Natural Gas Companies of Poland.....	150
Table 4-24: Principal Natural Gas Companies of Romania	155
Table 4-25: Principal Natural Gas Companies of Slovak Republic	158
Table 4-26: Principal Natural Gas Companies of Slovenia	162
Table 4-27: Principal Natural Gas Companies of Estonia	167
Table 4-28: Principal Natural Gas Companies of Latvia	169
Table 4-29: Principal Natural Gas Companies of Lithuania	173
Table 5-1: Principal Natural Gas Companies of Russia	193
Table 5-2: Principal Natural Gas Companies of Ukraine	201
Table 8-1: The major natural gas players in the States and Territories	260
Table 8-2: The major natural gas retailers for small customers in the States and Territories, as of October 2011	261
Table 8-3: Deregulation of electricity and gas timetable in Victoria	262
Table 8-4: Deregulation of electricity and gas timetable in New South Wales.....	263
Table 8-5: Deregulation of electricity and gas timetable in Queensland	264
Table 8-6: Deregulation of electricity and gas timetable in South Australia	264
Table 8-7: Deregulation of gas timetable in Western Australia	265
Table 8-8: Deregulation of electricity and gas timetable in ACT	265
Table 9-1: Natural gas markets in the USA.....	284
Table 9-2: Eligibility and Participation in Residential Retail Choice Programs, December 2009.....	287
Table 9-3: Residential Customers in Customer Choice Programs, percentage eligible, 2004-2009.....	289
Table 9-4: Licensed and Active Marketers Serving Residential Customers, 2009	290
Table 9-5: Eligibility and Participation: State public utility commissions	291
Table 9-6: The Federal Energy Authorities	302
Table 9-7: Provincial and Territorial Departments or Regulatory Boards	302



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