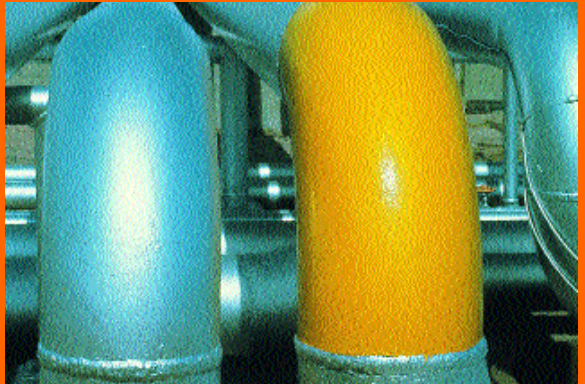




# Natural Gas in Europe



# What impact will deregulation have on the gas industry ?

“As competition arrives and intensifies, inevitably we will lose some customers to competitors, but we do not see this as a threat to our company, we view it rather as an opportunity to develop and grow.”

Dr.M.N.Conlon  
Chairman of Bord Gais Eireann

The issue of liberalisation and subsequent competition is one of the most widely discussed topics in the European gas markets and as this event gathers momentum, more and more questions are arising regarding the future of the European gas markets.

The Business Insights management report *Natural Gas in Europe* has the answer to questions such as, how will prices change? Will the structure of the national gas markets change dramatically once liberalisation is a reality? What lessons can be learnt from a market that has already liberalised?

In this climate of uncertainty you need not only the most up-to-date information, but also reliable data and forecasting. *Natural Gas in Europe*, will provide you with a level of information and analysis that is unsurpassed within the industry.

## Business Insights

Business Insights is a series of management reports which are produced in a joint venture with Datamonitor. They offer an unequalled insight into specialist areas that you will not find in any other report. Every Business Insights report will give you the benefit of:

- Primary research
- Independent, expert opinion
- Long-term predictions and analysis

## Primary research delivers unique and reliable information

Unlike other competitive information sources, Business Insights' reports consist of original primary research backed up by sound analysis and forecasts. When you buy *Natural Gas in Europe*, you will gain access to unique information gathered from:

- Interviews with over [30 key decision-makers](#) involved in the [European gas](#) industry;
- Exclusive surveys with [Marketing Directors](#) and [Strategy Managers](#) in the major utilities of each country;
- Interviews with [Energy Ministries across Europe](#) on each country's gas market;
- Data taken from over [50 in-depth executive surveys](#);
- Detailed [utility and customer research](#) taken from the UK and Nordic markets.

## You will benefit from:

- The most up-to-date information available;
- Quantitative and qualitative information;
- Information on major issues, threats and opportunities;
- Predictions and long-term strategic recommendations that you can act upon.

## Why this report is so valuable for your company

The forces driving liberalisation of the gas markets across Europe are gaining momentum. Do you have all the information necessary to make informed decisions?

*Natural Gas in Europe* is the study you need to plan ahead for the changing market. With this report you will be able to:

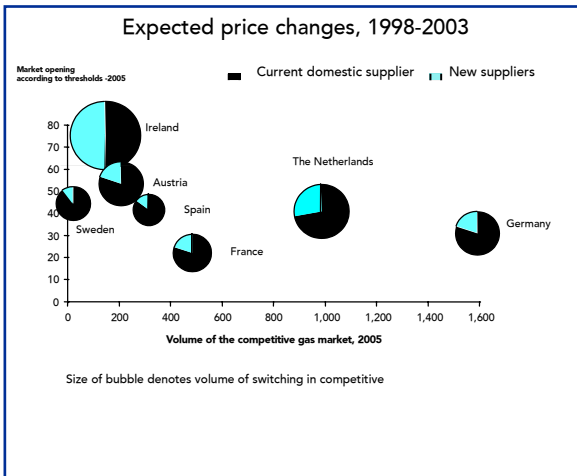
- Assess the short, medium and long-term impact of liberalisation across Europe's gas markets.
- Learn from strategies in the UK - how to maintain and gain market share.
- Forecast gas demand across Europe and identify the markets that will drive future growth.

## Expert analysis

This report is written by analysts with specialist knowledge in the field of energy. The analyst team is headed by a team of experts with either industry or consultancy experience from companies such as Mercer Management Consulting and Bain & Co. This combined experience enables Business Insights to apply analytical models to produce unrivalled and independent insight into the European gas industry market.

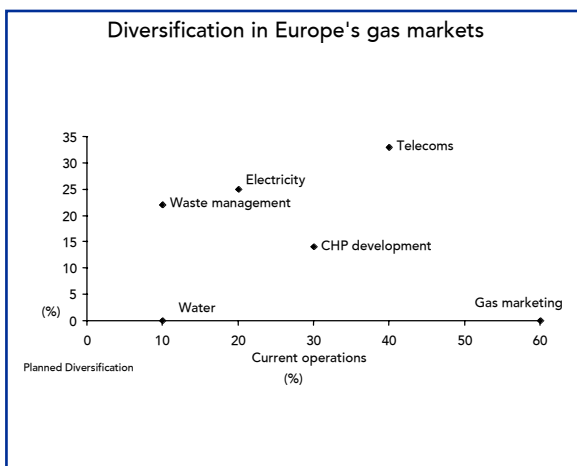
# Natural Gas in Europe addresses key questions, such as:

## What will be the price developments across Europe?



- How are prices forecast to react in a competitive environment ?
- Which consumer group will experience the most significant price changes over the next five years as suppliers vie for market share?
- Which countries will experience the most significant decreases in prices?

## What key lessons can be learnt from a market that is already liberalised?

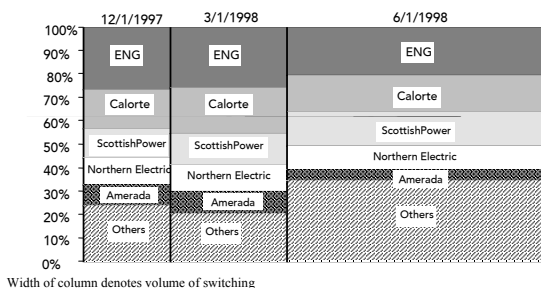


- Anticipate the reasons and rate of switching likely to occur, following the example of the UK.
- Learn which services customers value the most and which are incentives to switch supplier.
- Establish which companies have been most successful in the liberalised UK market and which strategies they have followed.

## What strategies are companies adopting to gain competitive advantage?

- Which areas are gas utilities diversifying into as a way of securing competitive advantage?
- Where are strategic alliances being developed across Europe's gas markets to defend against the anticipated increase in competition?
- Does restructuring always reap guaranteed benefits?

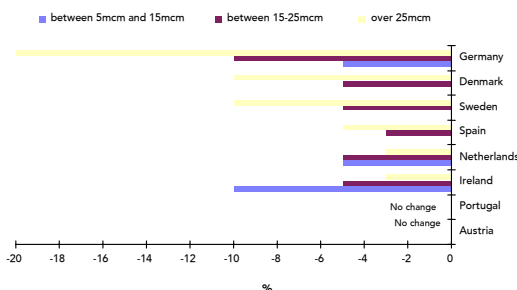
Percentage of switchers held by independents, 1998



## How do you prepare for the future market structure?

- As gas markets open to competition, assess and prepare for the effects of liberalisation on the national gas market structure.
- What level of switching will occur to new suppliers in the liberalised European gas markets?
- Anticipate where opportunities lie for entering new markets.

Customer switching, 2005



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### Liberalisation in European Energy.

- What share of the competitive market will switch to each type of new supplier?
- How many of your customers are forecast to switch?
- Which paths have utilities followed towards deregulation?

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