

**SG E 1**

# SCALE AND SCOPE

## Scope and Purpose:

- Analyse marketing & promotion campaigns for the use of natural gas
- Provide special attention to relevant market differences such as growing and mature markets, cold and warm weather markets, regulatory schemes, etc
- Analysis of market-applied innovation and new technologies, including hybrids.
- Profitability analysis of technologies relative to the level of usage covered

## TO DO

- In our private meetings we will decide how we want to structure the research going forward
- Set a plan for delivery data and gathering of best practices
- Find members from outside of Europe to take part in the group

# RESEARCH

Country / Region	Gas Demand (total and by use)	Indigenous Supply (conventional and UNC)	Imported Supply (source)	Environmental Drivers (regulations, etc.)	Possible Uses (and drivers for use)
<b>Portugal</b>	59.880 GWh	0%	100%	Kyoto Protocol SO <sub>2</sub> and NO <sub>x</sub> emissions (2001/81/CE Directive) National Program for Climatic Change	Electricity Gen, Industrial, Residential, transport
<b>Germany</b>	950 kWh	12 %	88 %	legal framework, technical guidelines, unbundling of companies	heating, technology (chemical, glass, concrete industries), power stations, transport
<b>Switzerland</b>	Total: 34 TWh	0%	100%	Federal laws, environmental CO <sub>2</sub> , construction; increasing opening of the Swiss gas market; increasing price awareness of (industrial) customers	Electricity production exit from nuclear, electricity import restrictions; Cogeneration, transport
<b>US</b>	Total: 22.1 Tcf; Industrial: 30%; Residential: 21%; Commercial: 15%; Electricity Generation: 34% (2011)	2,170 Tcf (2010) (Reserves plus resources)	3,123 Bcf (Canada, Mexico) (2013)	Environmental, energy and safety legislation, regulation and Executive Office policy, Supply and demand, Pricing (including anticipated volatility), Gas Infrastructure, Electricity Market Rules, Weather Conditions	Power Generation, Thermal Uses (Industry, Households, Commercial), Transportation Cooking, Hot Water (Households, Commercial), Industrial (chemical, manufacturing) Potentially future LNG exporting

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<b>Greece</b>	47.000-51.000GWh	0%	100% (80% Pipe, 20%LNG)	Legislation, Pricing, Economic Situation, Regulations, Gas Infrastructure, Electricity Market Rules	Power Generation, Chemical, Thermal (Industry, Households, Commercial), Transportation, Households, Commercial
<b>Spain</b>	362.718 GWh	0%	100% (approximately 40%pipe gas + 60%LNG)	Legislation, Economic Situation (crisis, taxation, GDP), Regulations, Gas Infrastructure, Electricity Market Rules , renewables increase in power generation breakdown	Power Generation CCGT, Industry, Households, Commercial, Transportation, Cooking-Hot Water
<b>France</b>	31.6 Mtep	0%	100%	Regulation/legislation, demand	Heating, industrial, transport