

CASE STUDY

European Gas Market Review Study **20 Country Review**

The Business Challenge

A client was seeking to better understand the European gas industry, real effects of EU Directives and future developments to assist with its forward planning. A detailed comprehension of the supply-demand characteristics, industry structure and infrastructure ownership, all gas players, trading and market status was required together with recommendations regarding for country market access for both new gas supply and M&A targets.

Approach

The client had specified 20 countries in Europe for the study to cover encompassing both Western and Central Eastern. Holmwood Consultant's Principal used a combination of published and unpublished data to supplement personal knowledge and insight from having worked in the European gas markets for over 10 years.

This comprehensive study examined the European gas market as a whole and defined opportunities and risks related to new gas supplies, as well as providing key recommendations. Additionally, the study was conducted on a country by country basis, covering aspects of gas supply-demand characteristics, market overview, key companies and organisations together with their ownership and relationships, natural gas infrastructure and the status of the internal gas market and trading.

A comprehensive 250 page Report was issued, in two deliverable stages, giving strategic content and making recommendations for possible future actions together with comment on risks associated with such actions.

The Benefits

The client was able to use the results of the report and its recommendations as major input to strategic thinking for future developments and access into the European gas industry. Our competence, understanding and experience in the European industry and gas market implementation provided a major capability to assist the client in understanding and strategically approaching future activity in the new and developing European gas markets.