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signed by Mr Jordi AYET PUIGARNAU, Director

date of receipt: 11 March 2009

to: Mr Javier SOLANA, Secretary-General/High Representative

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- Report on Progress in Creating the Internal Gas and Electricity Market
Technical Annex to the Communication from the Commission to the Council
and the European Parliament

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DG TREN STAFF WORKING DOCUMENT

Report on Progress in Creating the Internal Gas and Electricity Market

**Technical Annex to the
Communication from the Commission to the Council and the European Parliament**

{COM(2009)115}

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COMMISSION STAFF WORKINGPAPER

REPORT ON PROGRESS IN CREATING THE INTERNAL GAS AND ELECTRICITY MARKET: TECHNICAL ANNEX

BACKGROUND TO THIS REPORT

This summary technical report contains important background information relevant to the main 2008 Communication on the implementation of the electricity and gas Directives¹. The bulk of the information is based on the reports made by national regulators, which were submitted in the second half of 2007. These individual reports have been published and can be found on the website of the European Regulators' Group for Electricity and Gas (www.ergeg.org).

This report consists of comparative tables and graphs which, as in previous benchmarking exercises, draw together key indicators submitted by regulators. In addition, the Commission has this year conducted separate country reviews of Member States which are more forward looking assessments of the prospects for competition.² Since these comprise the main evaluation work of the Commission, no commentary has been provided for the tables in this document.

Most of the data used was submitted at the end of July 2008 and generally reflected the position at that date. However, some data items, referring to the information in a particular calendar year, will refer to the year 2007 as a whole. Where data is currently unavailable, this appears in tables as follows: "NA" (not available) or in the case the data is not applicable for the abbreviation: "NAP".

¹ 2003/54/EC and 2003/55/EC

² see http://ec.europa.eu/energy/energy_policy/annexes_en.htm

TABLE OF CONTENTS

1.	LEGAL IMPLEMENTATION.....	5
	Table 1.1 Market opening gas & electricity: Proportion of market open to competition .	5
2.	CUSTOMER DIMENSION	6
	Table 2.1 Increase in Annual Switching Rate Electricity 2006/2007 (by volume).....	6
	Table 2.2 Increase in Annual Switching Rate Electricity 2006/2007 (by eligible point)	7
	Table 2.3 Annual Switching Rate Gas 2006/2007 (by volume).....	8
	Table 2.4 Switching rate Gas 2006/2007 (by metering point).....	9
	Table 2.5 Existence of price controls	10
	Figure 2.6 Eurobarometer survey FL243 on consumer perception on switching	11
	Figure 2.7 Eurobarometer survey FL243 on consumer perception on change of electricity prices	11
	Figure 2.8 Eurobarometer survey FL243 on consumer perception on change of gas prices	12
3.	ELECTRICITY MARKET INDICIATORS.....	13
	Table 3.1 Degree of concentration.....	13
	Table 3.2 Wholesale Market Position Electricity – 2006/2007	14
	Table 3.3 Spot traded volumes as percentage of national electricity consumption.....	15
	Table 3.4 Retail Market position Electricity – 2006/2007	16
4.	GAS MARKET INDICIATORS.....	17
	Table 4.1 Market Structure in Import and Production of Gas	17
	Table 4.2 Structure of Gas retail market	18
5.	PRICE DEVELOPMENTS	19
	Figure 5.1 Electricity prices for household consumers (2008 s01) in €/100kWh	19
	Figure 5.2 Electricity prices for household consumers (2008 s01) in PPP	19
	Figure 5.3 Electricity prices for industrial consumers (2008 s01).....	20
	Figure 5.4 Gas prices for household consumers (2008 s01) in €/GJ.....	20
	Figure 5.5 Gas prices for household consumers (2008 s01) in PPP	21
	Table 5.7 Increase electricity price household consumers 2007 s02 – 2008 s1	22

Table 5.8 Increase in electricity prices for industrial consumers 2007 s02 – 2008 s1	24
Table 5.9 Increase gas prices household consumers 2007 s02 – 2008 s1.....	27
Figure 5.10 % increase gas household consumers.....	28
Table 5.11 Increase in gas prices for industrial consumers 2007 s02 – 2008 s1.....	29
Figure 5.12 Increase in gas prices for industrial consumers 2007 s02 – 2008 s01	31
Table 5.13 Overview % increases of end prices 2007 s02 – 2008 s01 per Member State.	32
6. NETWORK ACCESS	33
Table 6.1 Network Access: Electricity 2007	33
Table 6.2 Composition of electricity prices 2007	35
Table 6.3 Access Conditions to Gas Transmission networks.....	36
Table 6.4 Regulated companies and access charges: Gas	38
7. UNBUNDLING.....	39
Table 7.1 Unbundling of Network Operators: Electricity Transmission	39
Table 7.2 Unbundling of DSO in Electricity	40
Table 7.3 Unbundling of Network Operators: Gas Transmission	41
Table 7.4 Unbundling of Network Operators: Gas Distribution	42
8. SUPPLY – DEMAND BALANCE	43
Table 8.1 Electricity generation 2007	43
Table 8.2 Gas Security of Supply	44
Table 8.3 Production of natural gas in EU and Norway (2007)	45
Table 8.4 LNG 2007	46

1. LEGAL IMPLEMENTATION

Table 1.1 Market opening gas & electricity: Proportion of market open to competition

Eligible consumption ThW/ GWh by annual consumption in the country

	% Market opening			
	Electricity		Gas	
	2006	2007	2006	2007
Austria	100	100	100	100
Belgium	87,4	100	90,3	100
Bulgaria	60	100		
Cyprus³	30,8	31,8	NAP	NAP
Czech Republic	100	100	69,2	100
Denmark	100	100	100	100
Estonia	13	13	95	100
Finland	100	100	0	0
France	69	100	73	100
Germany	100	100	100	100
Greece	70	90,1	70	73,5
Hungary	37,09	22,29	10,35	24,96
Ireland	100	100	100	100
Italy	73	100	100	100
Latvia	76	100	NAP ⁴	NAP
Lithuania⁵	74	74	81	100
Luxembourg	84	100	79	100
Malta⁶	NAP	NAP	NAP	NAP
Netherlands	100	100	100	100
Poland	80	100	71	100
Portugal	100	100	0	42,9 ⁷
Slovakia	80	100	72	100
Slovenia	75	100	90	100
Spain	100	100	100	100
Sweden	100	100	100	100
United Kingdom	100	100	100	100

³ No developed gas market.

⁴ Derogation until 2010.

⁵ Derogation until 2010.

⁶ No developed gas market.

⁷ Derogation until 2010.

2. CUSTOMER DIMENSION

Table 2.1 Increase in Annual Switching Rate Electricity 2006/2007 (by volume)

	whole retail market			large industry			medium sized industry			small industry and households		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	NA	NA		5,60%	7,30%	1,70%	1,80%	2,10%	0,30%	1,00%	1,50%	0,50%
Belgium	NA	NA		NA	NA		NA	NA		NA	NA	
Bulgaria				NA	48,60%		NA	1,08%		NA	0%	
Cyprus	0%	0%		0%	0%		0%	0%		0%	0%	
Czech Republic	NA	0,80%		4%	6%		2%	3%	1,00%	0,10%	0,10%	
Denmark	9,00%	13,70%	4,70%	NA	NA		15,20%	20,80%	5,60%	2,70%	6,40%	3,70%
Estonia	0%	0%		NA	0%		0%	0%	0,00%	0%	0%	
Finland	NA	NA		NA	NA		NA	NA		NA	NA	
France	NA	NA		NA	NA		NA	NA		NA	NA	
Germany	9,41%	10,03%	0,62%	14,15%	13,19%	-0,96%	9,33%	9,71%	0,38%	2,55%	4,23%	1,68%
Greece	NA	0%		0%	0%	0,00%	0%	0%	0,00%	0%	0%	0,00%
Hungary	NA	NA		NA	NA		NA	NA		NA	NA	
Ireland	NA	NA		NA	NA		NA	NA		NA	NA	
Italy	NA	4,60%		NA	1,20%		NA	7,00%		NA	4,00%	
Latvia	0%	1%		0%	0%	0,00%	0%	2%	2,00%	0%	0%	0,00%
Lithuania	0%	0%		0%	0%	0,00%	0%	0%	0,00%	0%	0%	0,00%
Luxembourg	NA	15%		10,90%	29,10%	18,20%	0,70%	0,40%	-0,30%	0%	0,18%	0,18%
Malta												
Norway	NA	NA		NA	NA		NA	NA		NA	NA	
Poland	7,60%	7,80%	0,20%	15,84%	16,95%	1,11%	0,01%	0,13%	0,12%	0%	0,00%	0,00%
Portugal	NA	7,20%		5,50%	0,00%	-5,50%	55,70%	14,10%	-41,60%	4,10%	5,20%	1,10%
Romania	NA	NA		NA	6,22%		NA	7,13%		NAP %	0,93%	
Slovak Republic	NA	2%		NA	NA		NA	0%		0%	0%	
Slovenia	0,10%	3,60%	3,50%	0%	0%	0,00%	1,18%	6,50%	5,32%	1,46%	4,50%	3,04%
Spain	10%	10%	0,00%	9%	10%	1,00%	20%	22%	2,00%	5%	3%	-2,00%
Sweden	9,20%	9,10%	-0,10%	9,60%	8,70%	-0,90%	9,60%	8,70%	-0,90%	9,80%	10,40%	0,60%
The Netherlands	NA	NA		NA	NA		NA	NA		NA	NA	
United Kingdom	NA	NA		NA	NA		NA	NA		NA	NA	

Source: Regulators data

Table 2.2 Increase in Annual Switching Rate Electricity 2006/2007 (by eligible point)

	whole retail market			large industry			medium sized industry			small industry and households		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	NA	NA		7,60%	9,50%	1,90%	1,60%	2,10%	0,50%	1,00%	1,50%	0,50%
Belgium	NA	10,10%		0%	1%	1,00%	NA	NA		NA	NA	
Bulgaria	NA	0,00%		NA	35%		NA	0,01%		NA	0%	
Cyprus	0%	0%		0%	0%	0,00%	0%	0%	0,00%	0%	0%	0,00%
Czech Republic	NA	0,80%		4%	6%	2,00%	2%	3%	1,00%	0,20%	0,80%	0,60%
Denmark	1,40%	3,00%	1,60%	NA	%		11,50%	20,70%	9,20%	1,20%	2,80%	1,60%
Estonia	0%	0%	0,00%	10%	0%	-10,00%	0%	0%	0,00%	0%	0%	0,00%
Finland	4,20%	4,00%	-0,20%	NA	NA		NA	NA		NA	NA	
France	NA	0,40%		NA	1,20%		NA	0,03%		NA	2,20%	
Germany	NA	3,36%		NA	5,49%		NA	4,65%		NA	3,18%	
Greece	0%	0%	0,00%	NA	NA		NA	NA		NA	NA	
Hungary	NA	NA		NA	NA		NA	NA		NA	NA	
Ireland	NA	NA		NA	NA		NA	NA		NA	0,40%	
Italy	NA	1,90%		NA	28,20%		NA	22,60%		NA	1,90%	
Latvia	0%	1%	1,00%	0%	0%	0,00%	0%	3%	3,00%	0%	0%	0,00%
Lithuania	0%	0%	0,00%	0%	0%	0,00%	0%	0%	0,00%	0%	0%	0,00%
Luxembourg	NA	0,20%		3,14%	11,44%	8,30%	0,10%	0,19%	0,09%	0%	0,19%	0,19%
Malta												
Norway	11,80%	8,52%	-3,28%	NA	NA		8,20%	7,57%	-0,63%	11,90%	8,63%	-3,27%
Poland	NA	NA		1,89%	NA		0,24%	NA		0,00%	NA	
Portugal	0,40%	2,20%	1,80%	13,20%	0%	-13,20%	16,50%	3,90%	-12,60%	0,40%	2,20%	1,80%
Romania	NA	NA		NA	4,42%		NA	3,15%		NA	0,07%	
Slovak Republic	NA	2%		2%	2%	0,00%	0%	0%	0,00%	0%	0%	0,00%
Slovenia	2,20%	0,40%	-1,80%	0%	0%	0,00%	4,70%	10,40%	5,70%	0,20%	0,40%	0,20%
Spain	3%	2%	-1,00%	17%	18%	1,00%	8%	7%	-1,00%	3%	2%	-1,00%
Sweden	7,70%	10%	2,30%	8%	10,30%	2,30%	8%	10,30%	2,30%	7,80%	9,50%	1,70%
The Netherlands	NA	NA		NA	NA		NA	NA		5,60%	8,50%	2,90%
United Kingdom	NA	NA		NA	NA		NA	NA		18,00%	19,10%	1,10%

Source: Regulators data

Table 2.3 Annual Switching Rate Gas 2006/2007 (by volume)

	whole retail market			large industry			medium sized industry			small industry and households		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	NA	NA		3,40%	4,40%	1,00%	1,10%	1,30%	0,20%	0,50%	0,50%	0,00%
Belgium	NA	NA		NA	NA		NA	NA		NA	NA	
Bulgaria												
Cyprus	NA	NA		NA	NA		NA	NA		NA	NA	
Czech Republic	NA	NA		NA	NA		NA	NA		NA	NA	
Denmark	22%	29%	7,00%	NA	NA		NA	35%		NA	4,00%	
Estonia	NA	NA		0%	0%		0%	0%		0%	NA	
Finland	NA	NA		NA	NA		NA	NA		NA	NA	
France	NA	NA		NA	NA		NA	NA		NA	NA	
Germany	1,25%	3,79%	2,54%	2,82%	4,76%	1,94%	0,41%	3,88%	3,47%	0,04%	1,23%	1,19%
Greece	0%	0%		0%	0%		0%	0%		0%	0%	
Hungary	3%	8,10%	5,10%	86%	88%	2,00%	40%	46%	6,00%	1%	4,80%	3,80%
Ireland	NA	NA		NA	NA		NA	NA		NA	NA	
Italy	NA	NA		7%	NA		4%	4,70%	0,70%	1%	1%	
Latvia	0%	0%		0%	0%		0%	0%		0%	0%	
Lithuania	0%	0%		0%	0%		0%	0%		0%	0%	
Luxembourg	NA	NA		0%	0%		0%	0%		0%	0,00%	
Malta												
Norway												
Poland	0%	0%		0%	0%		0%	0%		0%	0%	
Portugal	NA	0%		NA	NA		NA	NA		NA	NA	
Romania	NA	NA		NA	NA		NA	NA		NA	NA	
Slovak Republic	NA	NA		0%	%		0%	0%		0%	NA	
Slovenia	0%	0%	0,00	0%	0%		0%	0%		0%	0%	
Spain	25%	20%	-5,00%	25%	20%	-5,00%	25%	20%	-5,00%	14%	15%	1,00%
Sweden	NA	NA		NA	NA		NA	NA		NA	NA	
The Netherlands	NA	NA		NA	NA		NA	NA		NA	NA	
United Kingdom	NA	NA		NA	NA		NA	NA		NA	NA	

Source: Regulators data

Table 2.4 Switching rate Gas 2006/2007 (by metering point)

	whole retail market			large industry			medium sized industry			small households	industry	and
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	0,50%	0,60%	0,10%	7,40%	3,80%	-3,60%	0,50%	0,90%	0,40%	0,60%	0,50%	-0,10%
Belgium	NA	9,66%		NA	NA		5,50%	NA		5,44%	NA	
Bulgaria												
Cyprus	NA	NA		NA	NA		NA	NA		NA	NA	
Czech Republic	NA	NA		0,10%	5,28%	5,18%	0,30%	0,11%	-0,19%	0%	0%	
Denmark	1,50%	0,90%	-0,60%	NA	NA		NA	14,00%		NA	0,90%	
Estonia	NA	NA		0%	0%	0,00%	0%	0%		0%	NA	
Finland	NA	NA		NA	NA		NA	NA		NA	NA	
France	NA	NA		NA	NA		NA	NA		NA	0,50%	
Germany	NA	1,01%		NA	4,20%		NA	0,85%		NA	1,01%	
Greece	0%	0%		0%	0%		0%	0%		0%	0%	
Hungary	NA	NA		NA	NA		NA	NA		NA	NA	
Ireland	NA	NA		NA	NA		NA	NA		NA	NA	
Italy	1,60%	0,80%	-0,80%	3,50%	5,40%	1,90%	3,30%	4,20%	0,90%	0,70%	0,70%	0,00%
Latvia	0%	0%		0%	0%		0%	0%		0%	0%	
Lithuania	0%	0%		0%	0%		0%	0%		0%	0%	
Luxembourg	NA	NA		0%	0%		0%	0%		0%	0,00%	
Malta												
Norway												
Poland	0%	0%		0%	0%		0%	0%		0%	0%	
Portugal	NA	0,00%		NA	NA		NA	NA		NA	NA	
Romania	NA	NA		NA	NA		NA	NA		NA	NA	
Slovak Republic	NA	0%		0%	0%		0%	NA		0%	NA	
Slovenia	0%	0%		0%	%		0%	0%	0,00%	0%	0%	0,00%
Spain	4%	5%	1,00%	25%	20%	-5,00%	25%	20%	-5,00%	7%	5%	-2,00%
Sweden	NA	NA		NA	NA		NA	NA		NA	NA	
The Netherlands	NA	NA		NA	NA		NA	NA		5,10%	8,30%	3,20%
United Kingdom	NA	NA		NA	NA		NA	NA		18,20%	18,40%	0,20%

Source: Regulators data

Table 2.5 Existence of price controls

	Electricity			Gas		
	Regulated tariffs - industrial users	Regulated tariffs - small commercial users	Regulated tariffs - households	Regulated tariffs - industrial users	Regulated tariffs - small commercial users	Regulated tariffs - households
Austria	N	N	N	N	N	N
Belgium	N	N	Y	N	N	Y
Bulgaria	Y	Y	Y	Y	Y	Y
Cyprus	Y	Y	Y			
Czech Rep.	N	N	Y	N	Y	Y
Denmark	Y	Y	Y	Y	Y	Y
Estonia	Y	Y	Y	N	N	Y
Finland	N	N	Y			
France	Y	Y	Y	Y	Y	Y
Germany	N	N	N	N	N	N
Greece	Y	Y	Y			
Hungary	Y	Y	Y	Y	Y	Y
Ireland	Y	Y	Y	Y	Y	Y
Italy	Y	Y	Y	N	N	Y
Latvia	Y	Y	Y	Y	Y	Y
Lithuania	Y	Y	Y	N	Y	Y
Luxembourg	N	N	Y	N	N	N
Malta	Y	Y	Y			
Netherlands	N	N	N	N	N	N
Norway	N	N	N			
Poland	Y	Y	Y	Y	Y	Y
Portugal	Y	Y	Y	Y	Y	Y
Romania	Y	Y	Y	Y	Y	Y
Slovakia	N	N	Y	N	N	Y
Slovenia	N	N	Y	N	Y	Y
Spain	Y	Y	Y	Y	Y	Y
Sweden	N	N	N	N	N	N
UK	N	N	N	N	N	N

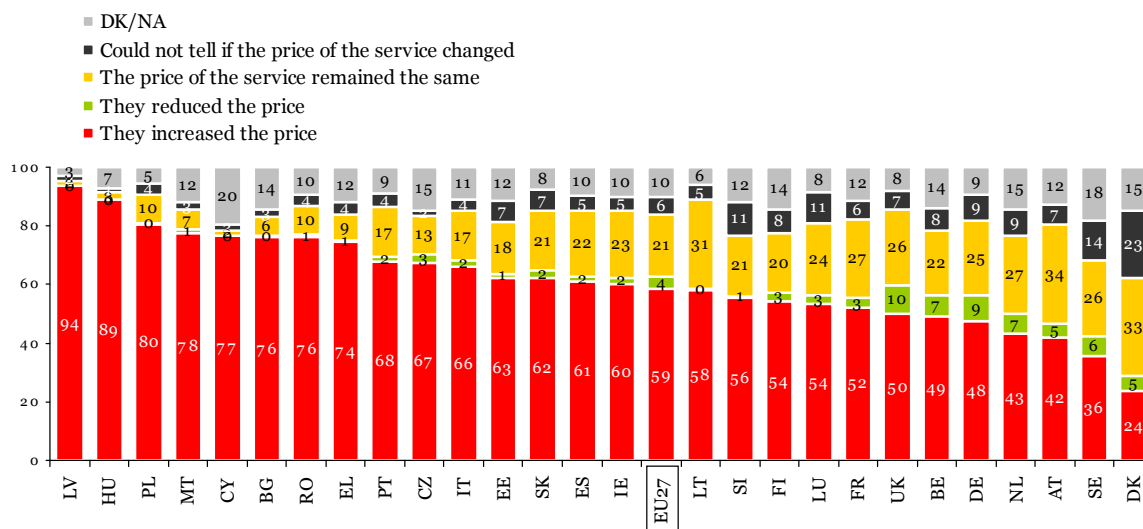
Figure 2.6 Eurobarometer survey FL243 on consumer perception on switching⁸

	Electricity	Gas (total)
Usage	100%	69%
Comparison of offers: very & fairly difficult	29%	28%
Consumers who switched	9%	7%
Consumers who got a cheaper price after switching (low sample size!)	69%	69%
Did not switch (because): "current provider offers the best value for money"	26%	27%
Did not switch (because): "no alternative local provider"	19%	19%
Switching facilitators: cost free switching	27%	27%
Switching facilitators: "standardized comparable offers from providers"	27%	26%
Switching facilitators: "a website that tells which provider is the cheapest for you"	24%	24%
Recent changes in prices: increases	59%	64%

Figure 2.7 Eurobarometer survey FL243 on consumer perception on change of electricity prices

Change in the price of the services in the last 12 months

Electricity supply provider



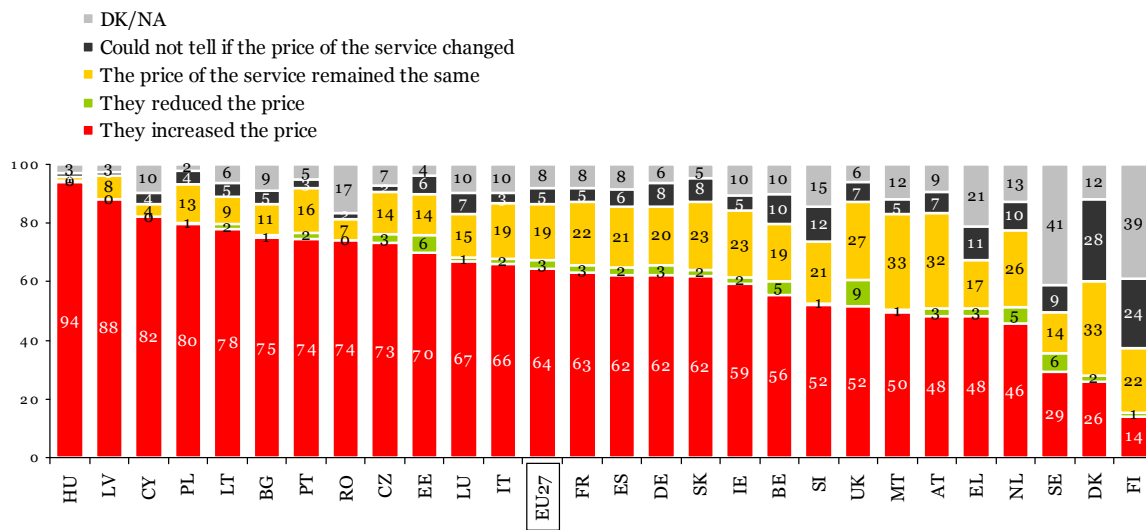
Q6. Which of the following has your present electricity supply provider done in the last 12 months?
Base: who use this service provider, % by country

⁸ Consumers' views on switching service providers.

Figure 2.8 Eurobarometer survey FL243 on consumer perception on change of gas prices

Change in the price of the services in the last 12 months

Gas supply provider



Q6. Which of the following has your present gas supply provider done in the last 12 months?
Base: who use this service provider, % by country

3. ELECTRICITY MARKET INDICIATORS

Table 3.1 Degree of concentration

	Electricity (generation)
Very highly concentrated [HHI above 5000]	BE, DK, EE, FR, GR, IE, LV, LX, ML, PT, SK, SL
Highly concentrated [HHI 1800-5000]	CZ, DE, ES, IT, LT
Moderately concentrated [HHI 750-1800]	AT, CY, FI, HU, PL, UK, NL, SW

Source: regulators' submissions, DG TREN calculations

(HHI by capacity – sum of squared shares of individual companies)

Table 3.2 Wholesale Market Position Electricity – 2006/2007

	Number of companies with more than 5 % share of generation capacity (%)			Share of 3 biggest companies (%)			HHI		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	5	5	0	52,2	52	-0,2	1575	NA	
Belgium	2	2	0	93	99,9	6,9	6500	8390	1890
Bulgaria	6	6	0	56,4	56,4	0	NA	NA	
Cyprus	1	1	0	100	100	0			0
Czech Republic	1	1	0	73,54	76,85	3,31	NA	NA	
Denmark	2	2	0	75	75	0	NA	NA	
Estonia	1	1	0	99	99	0	NAP		
Finland	4	4	0	67	68	1	NA	NA	
France	1	1	0	93	93	0	7589	6960	-629
Germany	5	4	-1	68,52	85,4	16,88	NA	NA	
Greece	1	1	0	99	NA		NA	1000	
Hungary	6	5	-1	67	67	0	1825	2119	294
Ireland	4			72			4773		
Italy	5	5	0	66,3	61,2	-5,1	2265	2126	-139
Latvia	1	1	0	95	93	-2	8110	8110	0
Lithuania	3	3	0	84	84	0	3285	3160	-125
Luxembourg	3	3	0	74,8	80	5,2	4020	5843	1823
Malta									
Norway	5	6	1	43,7	40	-3,7	1997	NA	
Poland	6	5	-1	62,8	50,9	-11,9	1789	1312,7	-476,3
Portugal	3	2	-1	75	72,5	-2,5	4612	4472	-140
Romania	5	5	0	65,1	63,7	-1,4	1890	1813	-77
Slovak Republic	1	1	0	84,8	85,2	0,4	7207	NA	
Slovenia	3	3	0	89,8	92,7	2,9	5224	7208	1984
Spain	4	5	1	60,3	76	15,7	1843	2269	426
Sweden	3	3	0	79	78	-1	880	NA	
The Netherlands	4	6	2	62	61	-1	1604	1592	-12
United Kingdom	6	8	2	37,5	41	3,5	938	986	48

Source: Regulators data

Table 3.3 Spot traded volumes as percentage of national electricity consumption

	consumption (TWh)		electr traded (PX - spot) TWh		volume % of consumption			Number of traders active at PX		
	2006	2007	2006	2007	2006	2007	Δ	2006	2007	Δ
Greece	54,6	55,25	56,1	58,4	102,75	105,70	2,88	24	27	3
Denmark	35,8	35,7	34,4	35,4	96,09	99,16	3,20	NA	9	NAP
Sweden	157,8	157,4	110,8	134,3	70,22	85,32	21,52	NA	150	NAP
Spain	268	276,3	139,1	221,2	51,90	80,06	54,25	22	25	3
Italy	337,5	339,9	196,5	221,3	58,22	65,11	11,83	80	89	9
Finland	90	90,3	37,8	41,4	42,00	45,85	9,16	NAP	NAP	NAP
Portugal	49,2	50,05	0	21,839	0,00	43,63	NAP	NA	2	NAP
Lithuania	8,9	9,1	1,68	2	18,88	21,98	16,43	5	5	0
Germany	567	569,2	88,46	122,26	15,60	21,48	37,68	161	192	31
The Netherlands	112	112	19,2	20,7	17,14	18,48	7,81	NA	NA	NAP
Romania	53,02	54,126	4,106	5,043	7,74	9,32	20,31	NA	99	NAP
France	478,4	480,3	29,6	44,2	6,19	9,20	48,73	74	68	-6
Belgium	89,9	90,109	0,532	7,6	0,59	8,43	1325,26	NA	24	NAP
UK	352,82	350,08	15,26	16,5	4,33	4,71	8,97	51	60	9
Austria	61,952	61,744	1,67	2,3	2,70	3,73	38,19	37	40	3
Poland	149,8	154,2	1,67	2,46	1,11	1,60	43,10	NA	NA	NAP
Slovenia	13,687	13,864	0,001	0,002	0,01	0,01	97,45	14	15	1

Sorted by 2007 % volume of consumption

Source: Regulators data

Δ Calculation by DG TREN

Notes:

BE: In 2007, 7,6 TWh was traded on Belpex DAM (which is about 8,5% of the Belgian consumption). The bought volume amounts to 6,8 TWh, whereas the sold volume is 4,9 TWh. These figures differ because Belpex DAM is coupled with Powernext and APX.

BG: There is no power exchange - spot in Bulgaria.

DK: Total trade on Nord Pool in physical spot market in 2004: 167 TWh. Denmark contributes with 19,2 TWh corresponding to 11,5% of the total. Total trade on Nord Pool in physical spot market in 2005: 176 TWh. Denmark contributes with 25,7 TWh corresponding to 14,6% of the total. Total trade on Nord Pool in physical spot market in 2006: 250 TWh. Denmark contributes with 34,4 TWh corresponding to 13,8% of the total. Total trade on Nord Pool in physical spot market in 2007: 291 TWh. Denmark contributes with 35,4 TWh corresponding to 12,2% of the total.

FI: Not relevant due to Nordic markets.

FR: Source: Powernext Day-ahead.

DE: 2006: Day-ahead spot market for the market area of Germany/Austria; 2007: Day-ahead spot market for the market area of Germany/ Austria 117,93 TWh; market area Switzerland 4,33 TWh; source: EEX.

GR: Calculated as the sum of generated energy plus imports.

HU: There is no power exchange in Hungary.

IE: The Single Electricity Market for the island of Ireland is a gross mandatory pool, therefore all energy goes through the pool. The market started on the 1st November 2007 and the above figure represents energy for 2 months.

LU: No power exchange in Luxembourg.

PT: Only the period 2008/07/01-2008/12/31; Includes day-ahead and intraday demand.

ES: Besides, in 2006, 104 TWh were negotiated in bilateral contracts out of the PX spot market, and 59 TWh were cleared at the PX over the counter. The amount of bilateral contracts negotiated out of the PX (104 TWh) was a temporary consequence of the (already revoked) Royal Decree Law 3/2006 (see National Report 2007).

SE: The values show the total purchased volume in the Swedish Elspot Bid Area.

Table 3.4 Retail Market position Electricity – 2006/2007

	Number of independent suppliers (%)			Companies with market share over 5% (%)			Market share of three largest companies in whole retail market (%)		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	3	3	0	7	7	0	80	80	0
Belgium	18	18	0	3	4	1	NA	NA	
Bulgaria	4	4	0	3	3	0	97,5	97,5	0
Cyprus	0	0	0	1	1	0	100	100	0
Czech Republic	285	282	-3	3	3	0	NA	99	
Denmark	5	9	4	8	7	-1	NA	NA	
Estonia	3	3	0	1	1	0	99	99	0
Finland	5	5	0	4	4	0	40	40	0
France	17	18	1	1	1	0	NA	94	
Germany	NA	NA		3	3	0	45,7	46,1	0,4
Greece	24	25	1	1	1	0	100	100	0
Hungary	11	12	1	4	4	0	85,57	87,18	1,61
Ireland	7	7	0	4	4	0	85	85	0
Italy	213	NA		4	3	-1	26,9	60	33,1
Latvia	8	8	0	1	1	0	100	97	-3
Lithuania	17	18	1	1	1	0	100	100	0
Luxembourg	2	3	1	4	3	-1	NA	93	
Malta									
Norway	5	5	0	5	5	0	35,7	31,2	-4,5
Poland	21	27	6	6	6	0	NA	44,9	
Portugal	3	3	0	3	2	-1	98,5	99,6	1,1
Romania	140	117	-23	5	5	0	43	44	1
Slovak Republic	140	151	11	3	3	0	NA	35	
Slovenia	8	14	6	6	7	1	71	68	-3
Spain	12	24	12	5	4	-1	67,5	83,9	16,4
Sweden	10	10	0	3	3	0	49,8	NA	
The Netherlands	20	22	2	4	4	0	NA	NA	
United Kingdom	16	21	5	6	6	0	NA	NA	

Source: Regulators data

4. GAS MARKET INDICIATORS

Table 4.1 Market Structure in Import and Production of Gas

	Number of companies with over 5 % share of production/import capacity (%)			Share of 3 biggest companies (by available gas) (%)			Share of 3 largest wholesalers in wholesale market (%)		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	4	4	0	80	80	0	80	80	0
Belgium	3	3	0	100	99,4	-0,6	100	99,4	-0,6
Bulgaria	1		-1	32,47	100	67,53	98	0	-98
Cyprus	NAP	NAP		NAP	NAP		NAP	NAP	
Czech Republic	1	1	0	NA	NA		100	NAP	
Denmark	7	7	0	NA	NA		90	90	0
Estonia	2	2	0	99	99	0	100	100	0
Finland	1	1	0	100	100	0	100	100	0
France	2	1	-1	94,51	88,97	-5,54	NA	NA	
Germany	NA	6		NA	58,65		NA	NA	
Greece	1	1	0	100	100	0	100	100	0
Hungary	2	2	0	96,2	92,8	-3,4	89,9	92,3	2,4
Ireland	NA			NA	NA		NA		
Italy	3	3	0	87,5	86,7	-0,8	66,5	63,8	-2,7
Latvia	1	1	0	100	100	0	0	0	0
Lithuania	2	2	0	100	100	0	100	100	0
Luxembourg	1	1	0	100	100	0	100	100	0
Malta									
Norway									
Poland	1	1	0	100	100	0	99,3	97,42	-1,88
Portugal	NA	0		0		0	NAP	0	
Romania	4	4	0	NA	74		90,6	83	-7,6
Slovak Republic	1	1	0	100	100	0	100	100	0
Slovenia	1	1	0	100	100	0	100	100	0
Spain	6	6	0	NA	75		75	75	0
Sweden	2	2	0	NA	NA		100	100	0
The Netherlands	4	NA		NA	NA		NA	NA	
United Kingdom	NA	NA		NA	NA		NA	NA	

Source: Regulators data

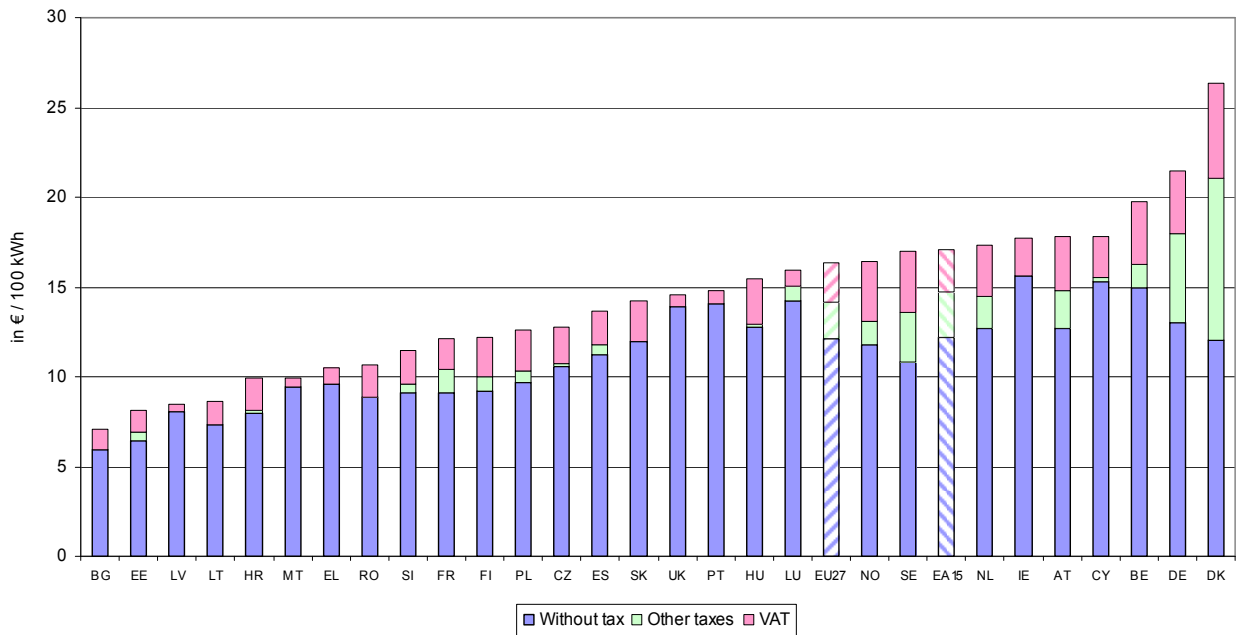
Table 4.2 Structure of Gas retail market

	Number of independent suppliers (%)			Companies with market share over 5% (%)			Market share of three largest companies in whole retail market (%)		
	2006	2007	Δ	2006	2007	Δ	2006	2007	Δ
Austria	5	5	0	5	5	0	NA	NA	
Belgium	6	28	22	3	4	1	NA	92,3	
Bulgaria			0			0			
Cyprus	NAP	NAP		NAP	NAP		NAP	NAP	
Czech Republic	3	7	4	7	8	1	NA	NA	
Denmark	3	7	4	3	4	1	NA	NA	
Estonia	0	0	0	1	1	0	99	99	0
Finland	0	0	0	6	6	0	NA	NA	
France	15	13	-2	3	3	0	90	98,5	8,5
Germany	NA	NA		4	4	0	30,87	26,3	-4,57
Greece	0	0	0	1	1	0	100	100	0
Hungary	0	5	5	7	7	0	73	75	2
Ireland	7	7	0	3	3	0	100	100	0
Italy	182	178	-4	3	3	0	66,5	66,5	0
Latvia	0	0	0	1	1	0	100	100	0
Lithuania	2	2	0	2	2	0	100	100	0
Luxembourg	2	3	1	3	4	1	NA	NA	
Malta									0
Norway									0
Poland	71	76	5	7	1	-6	100	100	0
Portugal	0	4	4	0	0	0	0	0	0
Romania	11	16	5	4	4	0	90,6	83	-7,6
Slovak Republic	0	NA		1	1	0	100	100	0
Slovenia	0	0	0	3	2	-1	86	86	0
Spain	19	19	0	5	5	0	75	74	-1
Sweden	0	0	0	5	5	0	88	NA	
The Netherlands	18	16	-2	3	4	1	NA	NA	
United Kingdom	27	23	-4	6	6	0	NA	NA	

Source: Regulators data

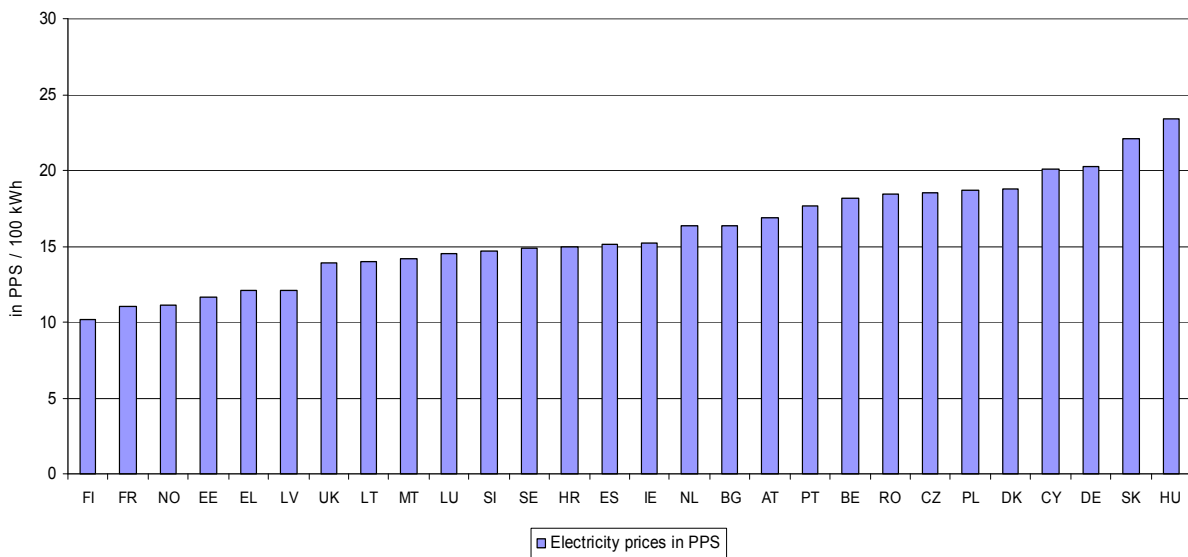
5. PRICE DEVELOPMENTS

Figure 5.1 Electricity prices for household consumers (2008 s01) in €/100kWh⁹



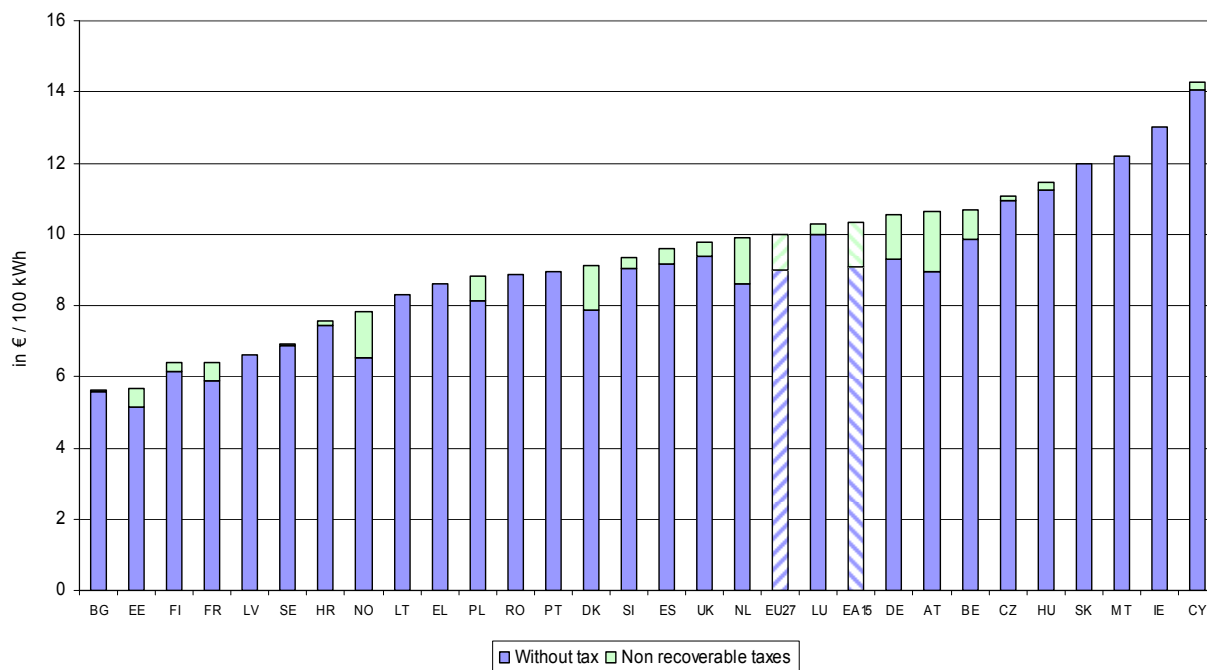
Source: Eurostat

Figure 5.2 Electricity prices for household consumers (2008 s01) in PPP



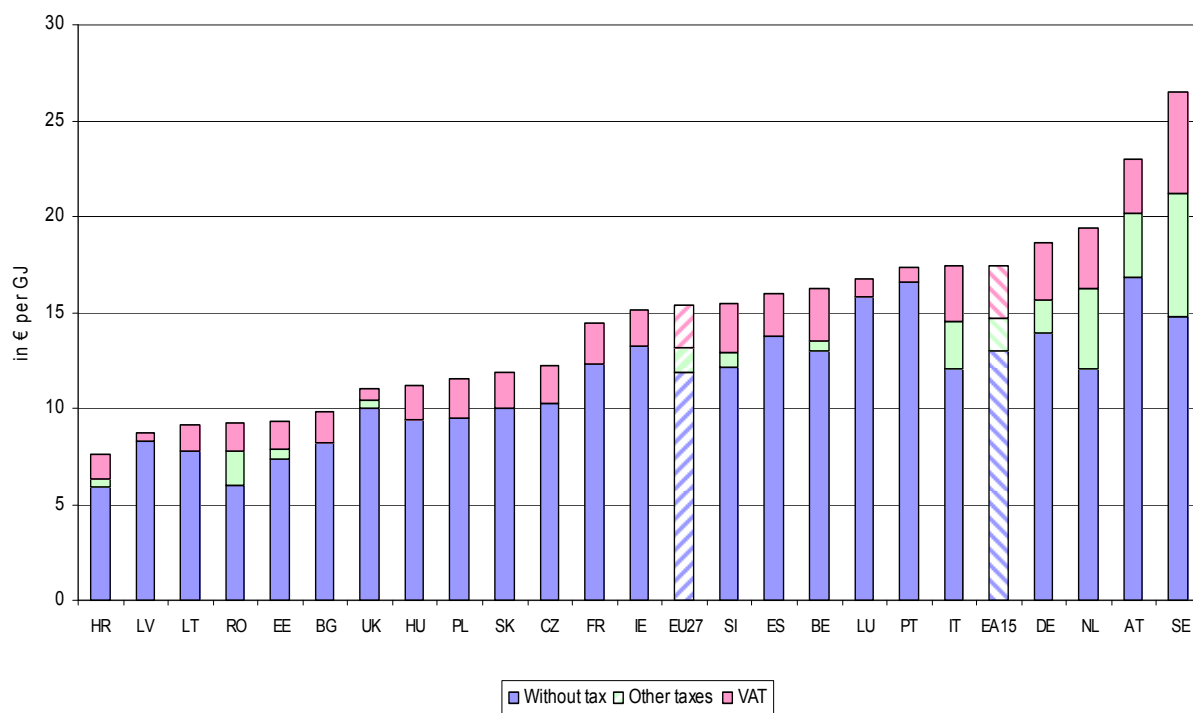
⁹ 'Household consumers' refer to consumer band Dc (annual consumption between 2500 and 5000 kWh).

Figure 5.3 Electricity prices for industrial consumers (2008 s01) ¹⁰



Source: Eurostat

Figure 5.4 Gas prices for household consumers (2008 s01) in €/GJ ¹¹



¹⁰ 'Industrial consumers' refer to consumer band Ic (annual consumption between 500 and 2000 MWh).

¹¹ 'Household consumers' refer to consumer band D2 (annual consumption between 20 and 200 GJ).

Source: Eurostat

Figure 5.5 Gas prices for household consumers (2008 s01) in PPP

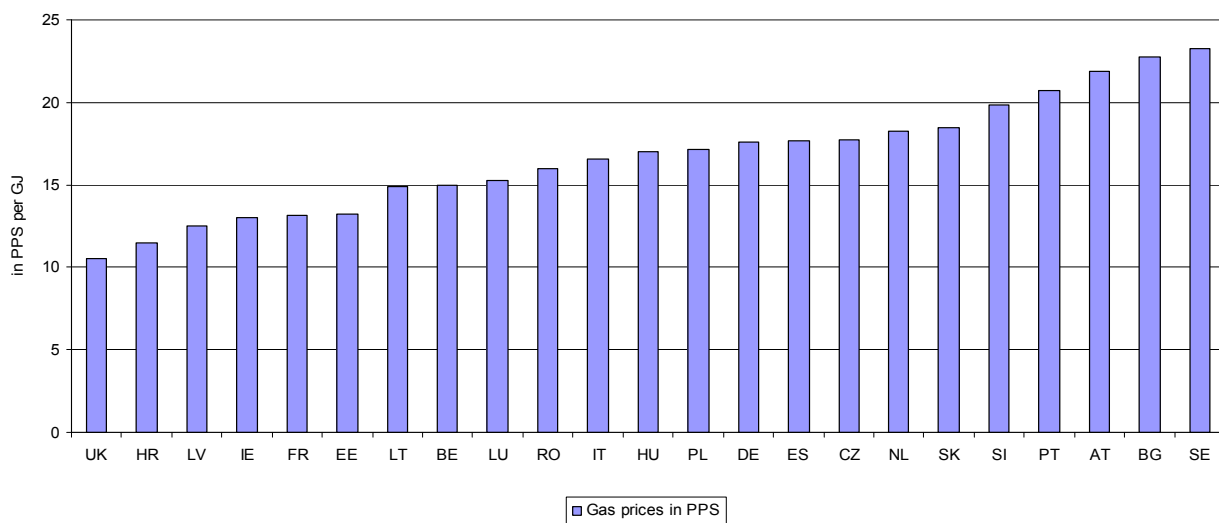
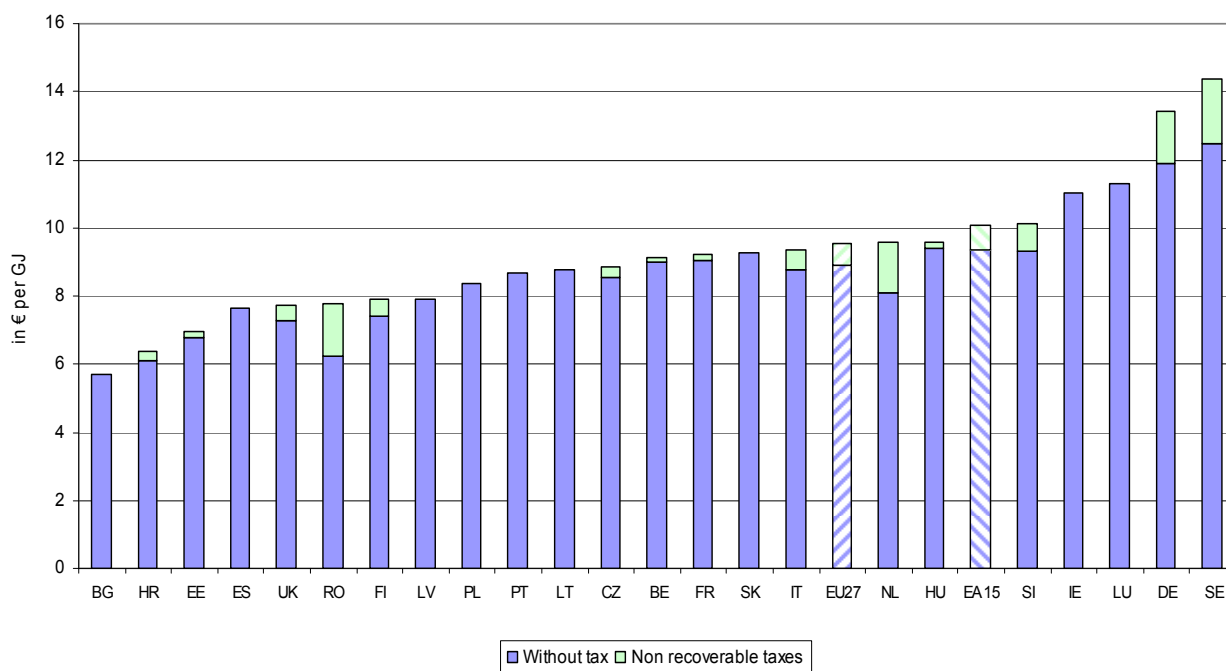


Figure 5.6 Gas prices for industrial consumers (2008 s01) ¹²



Source: Eurostat

¹² 'Industrial consumers' refer to consumer band I3 (annual consumption between 10 000 and 100 000 GJ).

Table 5.7 Increase electricity price household consumers 2007 s02 – 2008 s1

(Prices in €/kWh, end prices without taxes) – sorted by Δ %

Band DC : 2 500 kWh < Consumption < 5 000 kWh				Band DD : 5 000 kWh < Consumption < 15 000 kWh			
	2007s02	2008s01	Δ %		2007s02	2008s01	Δ %
Poland	0,1069	0,0965	-9,73	Portugal	0,1422	0,1264	-11,11
Ireland	0,169	0,1559	-7,75	Romania	0,0961	0,087	-9,47
Romania	0,0954	0,0885	-7,23	Ireland	0,1527	0,1385	-9,30
Portugal	0,1486	0,141	-5,11	Spain	0,1058	0,1021	-3,50
Spain	0,1152	0,1124	-2,43	Estonia	0,0626	0,0607	-3,04
Estonia	0,0652	0,0639	-1,99	Lithuania	0,0701	0,0685	-2,28
Bulgaria	0,0603	0,0593	-1,66	Germany	0,1187	0,1176	-0,93
Netherlands	0,129	0,127	-1,55	Bulgaria	0,0593	0,0588	-0,84
United Kingdom	0,1411	0,1394	-1,20	France	0,0792	0,0792	0,00
Lithuania	0,0737	0,0729	-1,09	Luxembourg	0,1306	0,1306	0,00
France	0,0914	0,0914	0,00	Malta	0,1246	0,1246	0,00
Luxembourg	0,1421	0,1421	0,00	Austria	0,1175	0,118	0,43
Malta	0,0945	0,0945	0,00	Netherlands	0,119	0,12	0,84
Austria	0,1255	0,1271	1,27	Euro area	0,1097	0,1108	1,00
Germany	0,1279	0,1299	1,56	United Kingdom	0,1277	0,129	1,02
European Union	0,1189	0,1211	1,85	Sweden	0,0899	0,0913	1,56
Euro area	0,1196	0,1219	1,92	European Union	0,108	0,1101	1,94
Slovakia	0,1152	0,1194	3,65	Greece	0,11	0,1139	3,55
Finland	0,0868	0,0915	5,41	Finland	0,0739	0,0779	5,41
Slovenia	0,0861	0,0911	5,81	Slovenia	0,0798	0,0849	6,39
Greece	0,09	0,0957	6,33	Poland	0,0793	0,0852	7,44
Sweden	0,1013	0,1085	7,11	Slovakia	0,0922	0,1002	8,68
Cyprus	0,1348	0,1528	13,35	Cyprus	0,1352	0,1533	13,39
Latvia	0,0694	0,0802	15,56	Latvia	0,0686	0,0782	13,99
Belgium	0,1286	0,15	16,64	Belgium	0,1129	0,133	17,80
Denmark	0,1027	0,1203	17,14	Denmark	0,087	0,1036	19,08
Czech Republic	0,0895	0,106	18,44	Czech Republic	0,0719	0,0869	20,86
Hungary	0,0957	0,1277	33,44	Hungary	0,0987	0,1271	28,77

Source: Eurostat; Δ calculation by DG TREN

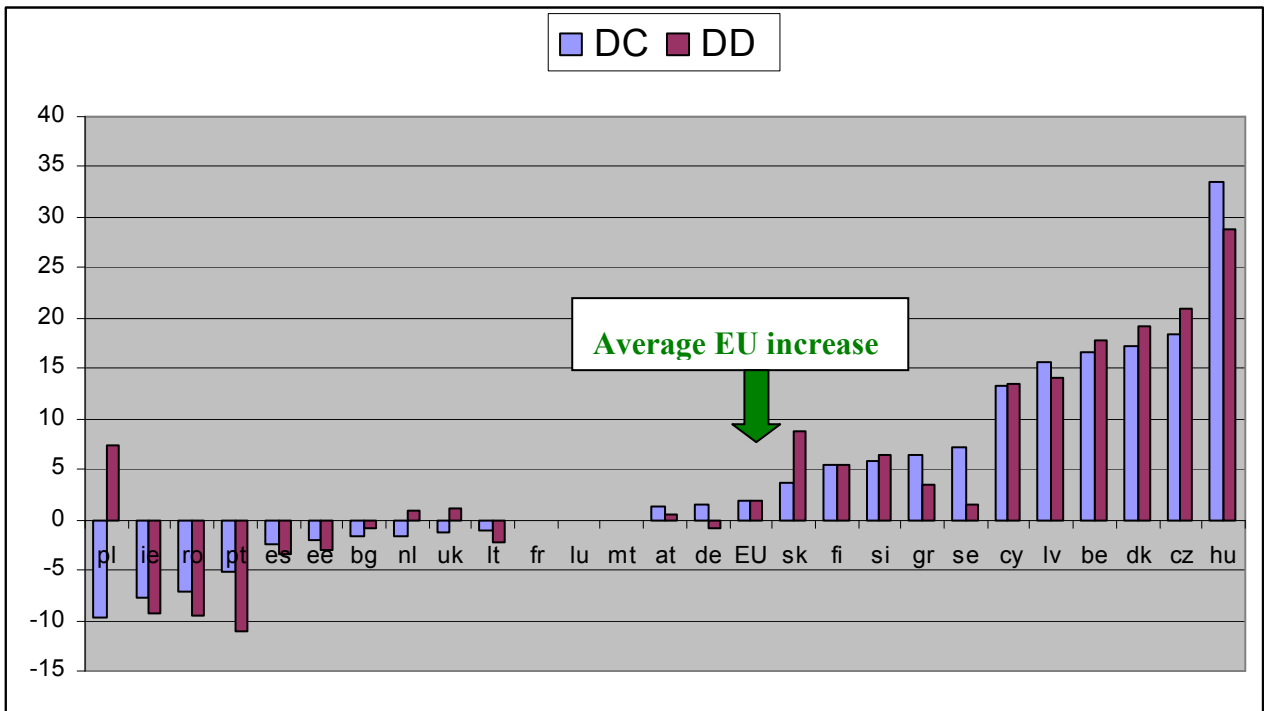


Table 5.8 Increase in electricity prices for industrial consumers 2007 s02 – 2008 s1

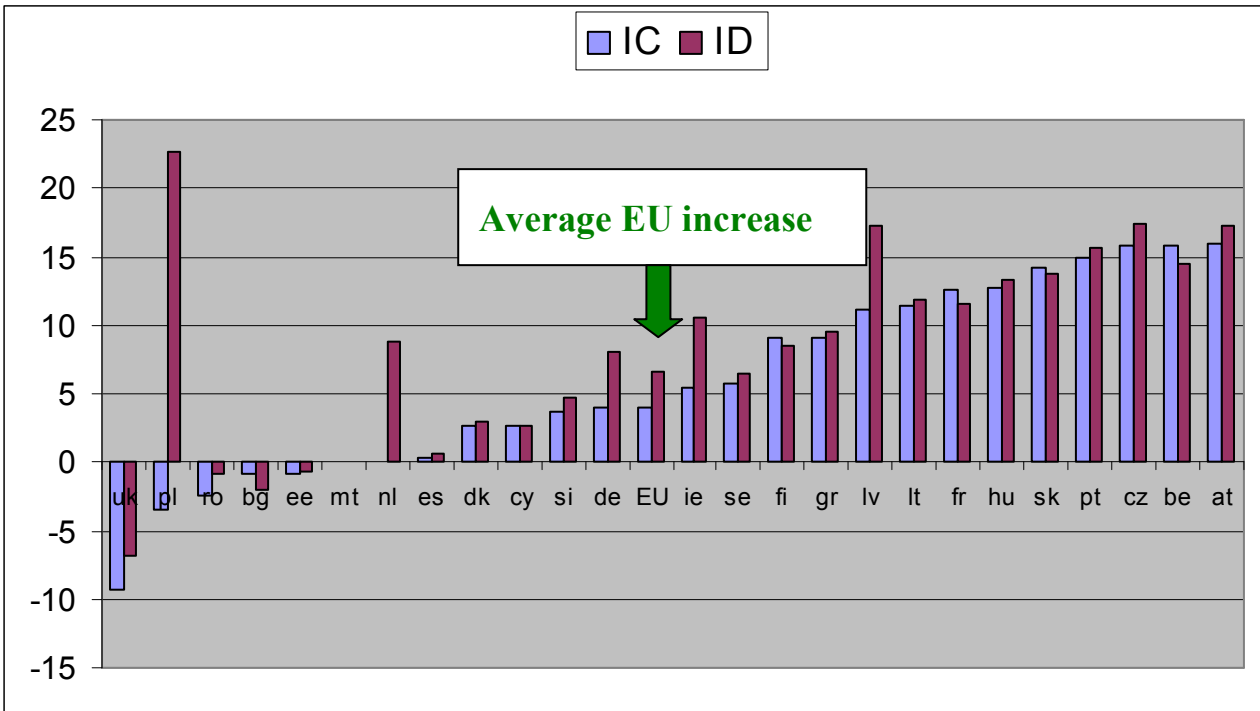
(Prices in €/kWh, end prices without taxes) – sorted by Δ %

Band IC : 500 MWh < Consumption < 2 000 MWh			
	2007s02	2008s01	Δ %
United Kingdom	0,1033	0,0937	-9,29
Poland	0,0843	0,0814	-3,44
Romania	0,0908	0,0886	-2,42
Bulgaria	0,0562	0,0557	-0,89
Estonia	0,0518	0,0514	-0,77
Luxembourg	0,0999	0,0999	0,00
Malta	0,1221	0,1221	0,00
Netherlands	0,086	0,086	0,00
Spain	0,0912	0,0915	0,33
Denmark	0,0765	0,0785	2,61
Cyprus	0,1369	0,1405	2,63
Slovenia	0,0872	0,0904	3,67
Germany	0,0894	0,0929	3,91
European Union	0,0865	0,0900	4,05
Ireland	0,1235	0,1302	5,43
Sweden	0,0651	0,0688	5,68
Euro area	0,0856	0,0909	6,19
Finland	0,0563	0,0614	9,06
Greece	0,0789	0,0861	9,13
Latvia	0,0594	0,066	11,11
Lithuania	0,0744	0,0829	11,42
France	0,0524	0,059	12,60
Hungary	0,0997	0,1124	12,74
Slovakia	0,1048	0,1197	14,22
Portugal	0,0779	0,0895	14,89
Czech Republic	0,0946	0,1095	15,75
Belgium	0,0853	0,0988	15,83
Austria	0,0774	0,0897	15,89

Band ID : 2 000 MWh < Consumption < 20 000 MWh			
	2007s02	2008s01	Δ %
United Kingdom	0,0906	0,0844	-6,84
Bulgaria	0,0501	0,0491	-2,00
Romania	0,079	0,0783	-0,89
Estonia	0,0435	0,0432	-0,69
Malta	0,0917	0,0918	0,11
Spain	0,0794	0,0799	0,63
Cyprus	0,1261	0,1295	2,70
Denmark	0,0761	0,0783	2,89
Slovenia	0,0709	0,0742	4,65
Sweden	0,0577	0,0614	6,41
European Union	0,0759	0,0809	6,59
Euro area	0,0758	0,0818	7,92
Germany	0,0776	0,0839	8,12
Finland	0,0538	0,0584	8,55
Netherlands	0,079	0,086	8,86
Greece	0,0673	0,0737	9,51
Ireland	0,1086	0,1201	10,59
France	0,0468	0,0522	11,54
Lithuania	0,0627	0,0701	11,80
Hungary	0,0862	0,0977	13,34
Slovakia	0,0952	0,1083	13,76
Belgium	0,0748	0,0856	14,44
Portugal	0,0698	0,0807	15,62
Latvia	0,0499	0,0585	17,23
Austria	0,0655	0,0768	17,25
Czech Republic	0,0778	0,0913	17,35
Poland	0,0626	0,0768	22,68

Source: Eurostat: Δ calculation by DG TREN

Δ % sorted on IC



Band IE : 20 000 MWh < Consumption < 70 000 MWh			
	2007s02	2008s01	Δ %
Netherlands	0,08	0,075	-6,25
Bulgaria	0,0424	0,0404	-4,72
United Kingdom	0,086	0,083	-3,49
Malta	0,0581	0,0581	0,00
Slovenia	0,0616	0,0619	0,49
Spain	0,0662	0,0682	3,02
Denmark	0,0708	0,0734	3,67
Sweden	0,0521	0,0549	5,37
Austria	0,0653	0,0691	5,82
Estonia	0,0332	0,0353	6,33
Greece	0,0606	0,0654	7,92
European Union	0,0659	0,0711	7,89
Euro area	0,065	0,0704	8,31
Cyprus	0,1099	0,1196	8,83
Ireland	0,1094	0,1191	8,87
Germany	0,0724	0,0791	9,25
Romania	0,0638	0,0699	9,56
Belgium	0,0662	0,0727	9,82
Slovakia	0,0848	0,0968	14,15
France	0,0468	0,0536	14,53
Latvia	0,0447	0,052	16,33
Hungary	0,0723	0,0871	20,47
Portugal	0,0562	0,0681	21,17
Czech Republic	0,0668	0,081	21,26
Lithuania	0,0548	0,0668	21,90
Finland	0,0405	0,0502	23,95
Poland	0,047	0,0669	42,34

Band IF : 70 000 MWh < Consumption < 150 000 MWh			
	2007s02	2008s01	Δ %
Bulgaria	0,0383	0,0348	-9,14
Slovenia	0,0645	0,0624	-3,26
Estonia	0,0332	0,0336	1,20
Austria	0,0599	0,0612	2,17
Denmark	0,0708	0,0734	3,67
United Kingdom	0,0824	0,0857	4,00
Cyprus	0,1129	0,1201	6,38
Germany	0,0722	0,0776	7,48
Spain	0,0528	0,0568	7,58
Romania	0,0572	0,0617	7,87
Greece	0,0599	0,0649	8,35
Euro area	0,0617	0,0672	8,91
Sweden	0,0508	0,0555	9,25
European Union	0,0625	0,0685	9,60
Netherlands	0,076	0,085	11,84
Lithuania	0,0556	0,063	13,31
France	0,0433	0,0502	15,94
Finland	0,0417	0,0486	16,55
Belgium	0,0569	0,0666	17,05
Slovakia	0,0734	0,0881	20,03
Latvia	0,043	0,0519	20,70
Portugal	0,0497	0,0605	21,73
Czech Republic	0,0668	0,0825	23,50
Hungary	0,059	0,0758	28,47
Poland	0,0435	0,0611	40,46

Source: Eurostat

Δ calculation by DG TREN

Table 5.9 Increase gas prices household consumers 2007 s02 – 2008 s1

(Prices in €/Gigajoules, end prices without taxes) – sorted by Δ %

Band D1 : Consumption < 20 GJ				Band D2 : 20 GJ < Consumption < 200 GJ				Band D3 : Consumption > 200 GJ			
	2007s02	2008s01	Δ %		2007s02	2008s01	Δ %		2007s02	2008s01	Δ %
Ireland	26,5500	16,7600	-36,87	Ireland	14,8400	13,2900	-10,44	Romania	6,3162	5,9542	-5,73
Romania	6,3416	5,9454	-6,25	Romania	6,3128	5,9497	-5,75	Slovakia	9,5449	9,3427	-2,12
France	22,7400	22,1000	-2,81	Portugal	17,2663	16,5390	-4,21	Ireland	12,7800	12,6800	-0,78
Portugal	22,0424	21,4470	-2,70	Spain	13,9210	13,7770	-1,03	Sweden	14,1642	14,0684	-0,68
Sweden	18,5946	18,1747	-2,26	France	12,1800	12,2900	0,90	Spain	11,3850	11,4740	0,78
Italy	14,2640	13,9480	-2,22	Netherlands	11,7300	12,0090	2,38	Germany	11,9000	12,0900	1,60
Estonia	9,0856	8,9441	-1,56	Sweden	14,3798	14,7723	2,73	Netherlands	11,1810	11,4300	2,23
Netherlands	18,0770	18,2720	1,08	Slovakia	9,6748	9,9898	3,26	Euro area	11,1000	11,5439	4,00
Spain	16,6520	16,9400	1,73	Poland	9,1348	9,4774	3,75	France	10,6800	11,1200	4,12
European Union	15,3500	16,1292	5,08	European Union	11,1100	11,7139	5	Italy	10,1920	10,6650	4,64
Euro area	17,9200	18,5646	3,60	Germany	12,6800	13,3200	5,05	Portugal	14,1428	14,8560	5,04
Bulgaria	7,0968	7,4957	5,62	Euro area	12,1400	12,7896	5,35	Hungary	8,7367	9,2439	5,81
Poland	11,7421	12,6079	7,37	United Kingdom	9,4392	9,9662	5,58	Poland	8,3776	8,9132	6,39
Hungary	8,7996	9,5277	8,27	Hungary	8,8488	9,3641	5,82	European Union	10,1000	10,8458	7,38
United Kingdom	10,2289	11,1702	9,20	Italy	11,1380	12,0310	8,02	Slovenia	10,4400	11,2800	8,05
Slovenia	13,6700	14,9700	9,51	Bulgaria	7,4803	8,2012	9,64	Bulgaria	7,5979	8,3188	9,49
Germany	17,7200	19,6300	10,78	Slovenia	10,9900	12,1400	10,46	Latvia	7,2894	8,2462	13,13
Belgium	17,4400	19,4000	11,24	Latvia	7,3322	8,2749	12,86	Luxembourg	9,7800	11,5800	18,40
Latvia	7,8182	8,7616	12,07	Belgium	11,1400	13,0100	16,79	United Kingdom	8,1667	9,8036	20,04
Slovakia	18,9651	21,7052	14,45	Estonia	6,1748	7,3897	19,68	Estonia	6,1417	7,4274	20,93
Luxembourg	13,4900	15,8100	17,20	Czech Republic	8,4540	10,2536	21,29	Belgium	9,9700	12,2300	22,67
Czech Republic	12,6985	15,3379	20,79	Austria	12,3800	16,8100	35,78	Czech Republic	8,2922	10,2627	23,76
Austria	15,6700	20,1800	28,78	Lithuania	5,5245	7,7517	40,31	Austria	10,6800	13,6700	28,00
Lithuania	8,4740	11,9980	41,59	Luxembourg	9,7800	15,8100	61,66	Lithuania	4,8674	7,5519	55,15

Source: Eurostat

Δ calculation by DG TREN

Figure 5.10 % increase gas household consumers

Sorted on D1

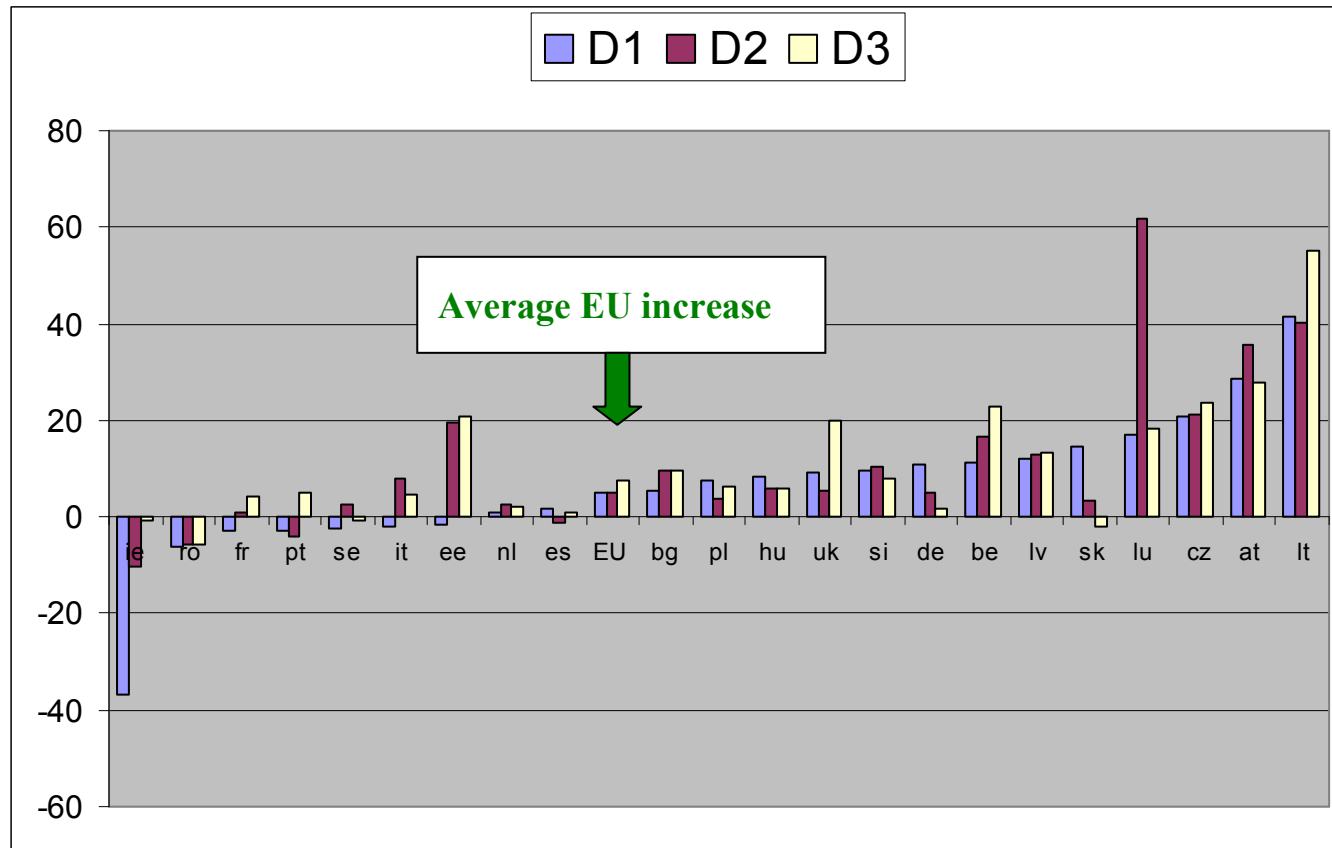


Table 5.11 Increase in gas prices for industrial consumers 2007 s02 – 2008 s1

(Prices in €/Gigajoules, end prices without taxes) – sorted by Δ %

Band I1 : Consumption < 1 000 GJ			
	2007s02	2008s01	Δ %
Romania	6,2820	5,9252	-5,68
France	11,4300	10,9000	-4,64
Ireland	12,5700	12,4400	-1,03
United Kingdom	10,5420	10,5172	-0,24
Slovenia	11,2900	11,3900	0,89
Netherlands	10,9980	11,1850	1,70
Spain	8,8440	9,1980	4,00
Poland	9,2210	9,6145	4,27
European Union	10,2300	10,8027	5,60
Euro area	10,5300	11,1460	5,85
Italy	9,3780	10,1390	8,11
Slovakia	9,6829	10,5218	8,66
Germany	11,8200	12,9200	9,31
Latvia	7,2751	8,2033	12,76
Bulgaria	5,5220	6,2430	13,06
Sweden	14,0456	15,9776	13,76
Portugal	12,7432	14,5860	14,46
Belgium	10,7600	12,6500	17,57
Luxembourg	9,7800	11,5800	18,40
Czech Republic	8,0114	9,8667	23,16
Hungary	9,6427	11,9263	23,68
Lithuania	7,0953	8,8922	25,33
Estonia	5,8367	7,3969	26,73

Band I2 : 1 000 GJ < Consumption < 10 000 GJ			
	2007s02	2008s01	Δ %
Netherlands	9,8980	9,3760	-5,27
Romania	6,2656	5,9383	-5,22
United Kingdom	8,5010	8,4525	-0,57
Ireland	10,8300	10,8800	0,46
Latvia	8,1041	8,1603	0,69
Portugal	10,7838	11,0790	2,74
Slovenia	10,4500	10,7900	3,25
France	9,6100	9,9700	3,75
European Union	9	9,8392	8,12
Poland	8,4125	9,1280	8,51
Italy	9,3780	10,1920	8,68
Euro area	9,46	10,3018	8,90
Spain	7,3090	8,0340	9,92
Belgium	9,5000	10,6700	12,32
Sweden	12,3856	14,1004	13,85
Bulgaria	5,2817	6,0333	14,23
Luxembourg	9,7800	11,3000	15,54
Slovakia	8,1519	9,4388	15,79
Germany	10,5400	12,2700	16,41
Hungary	8,9082	10,6429	19,47
Czech Republic	7,3497	9,0054	22,53
Lithuania	6,7894	8,7971	29,57
Estonia	5,3766	7,3785	37,23

Band I3 : 10 000 GJ < Consumption < 100 000 GJ			
	2007s02	2008s01	Δ %
Netherlands	8,5130	8,1240	-4,57
Romania	6,4765	6,2327	-3,76
Latvia	7,7039	7,9026	2,58
Portugal	8,1989	8,6900	5,99
United Kingdom	6,8078	7,2911	7,10
Spain	7,0740	7,6410	8,02
France	8,3400	9,0300	8,27
European Union	7,9600	8,7919	10,45
Euro area	8,3500	9,2270	10,50
Italy	7,8540	8,7740	11,71
Hungary	8,3506	9,3808	12,34
Ireland	9,7200	11,0500	13,68
Bulgaria	5,0159	5,7163	13,96
Germany	9,8600	11,2800	14,40
Slovenia	8,0500	9,3300	15,90
Poland	7,2150	8,3633	15,92
Belgium	7,7000	8,9800	16,62
Sweden	10,6932	12,4898	16,80
Slovakia	7,9429	9,2788	16,82
Finland	6,3000	7,4000	17,46
Luxembourg	9,2400	11,3000	22,29
Czech Republic	6,8169	8,5375	25,24
Lithuania	6,7598	8,7871	29,99
Estonia	5,0359	6,7774	34,58

Source: Eurostat
 Δ calculation by DG TREN

Band 14 : 100 000 GJ < Consumption < 1 000 000 GJ			
	2007s02	2008s01	Δ %
Romania	6,2618	5,7951	-7,45
Netherlands	7,6370	7,8580	2,89
Latvia	7,4037	7,7881	5,19
Hungary	6,8995	7,2884	5,64
Spain	6,6970	7,1370	6,57
France	7,2900	7,9200	8,64
Portugal	5,8430	6,5940	12,85
Finland	6,2000	7,0000	12,90
European Union	6,9600	7,9091	13,64
Euro area	7,2600	8,2324	13,39
Italy	7,2240	8,2740	14,53
Ireland	6,9100	8,0500	16,50
Slovakia	7,3624	8,5997	16,81
Bulgaria	4,5710	5,4044	18,23
Poland	6,2805	7,4267	18,25
United Kingdom	5,8912	6,9814	18,51
Germany	7,7600	9,2700	19,46
Sweden	9,3566	11,1992	19,69
Belgium	7,1100	8,6500	21,66
Czech Republic	6,3746	7,8922	23,81
Slovenia	6,7900	8,4100	23,86
Estonia	4,8171	6,1716	28,12
Lithuania	5,8836	8,0839	37,40

Band 15 : 1 000 000 GJ < Consumption < 4 000 000 GJ			
	2007s02	2008s01	Δ %
Romania	5,8633	5,3363	-8,99
Latvia	7,2179	7,1152	-1,42
Hungary	7,0790	7,1677	1,25
Netherlands	7,1530	7,8090	9,17
Finland	5,7000	6,5000	14,04
France	6,8400	7,8600	14,91
Portugal	5,4540	6,3230	15,93
Italy	6,9610	8,1690	17,35
Slovakia	7,0468	8,2814	17,52
Poland	5,7945	6,8424	18,08
Bulgaria	4,4994	5,3226	18,30
Spain	5,5350	6,6030	19,30
Belgium	7,1200	8,8100	23,74
Germany	6,2700	7,7800	24,08
Czech Republic	6,1482	7,7089	25,38
United Kingdom	5,2254	6,7362	28,91
Estonia	4,7103	6,1165	29,85
Lithuania	5,2985	7,2647	37,11

Figure 5.12 Increase in gas prices for industrial consumers 2007 s02 – 2008 s01

Sorted on I3

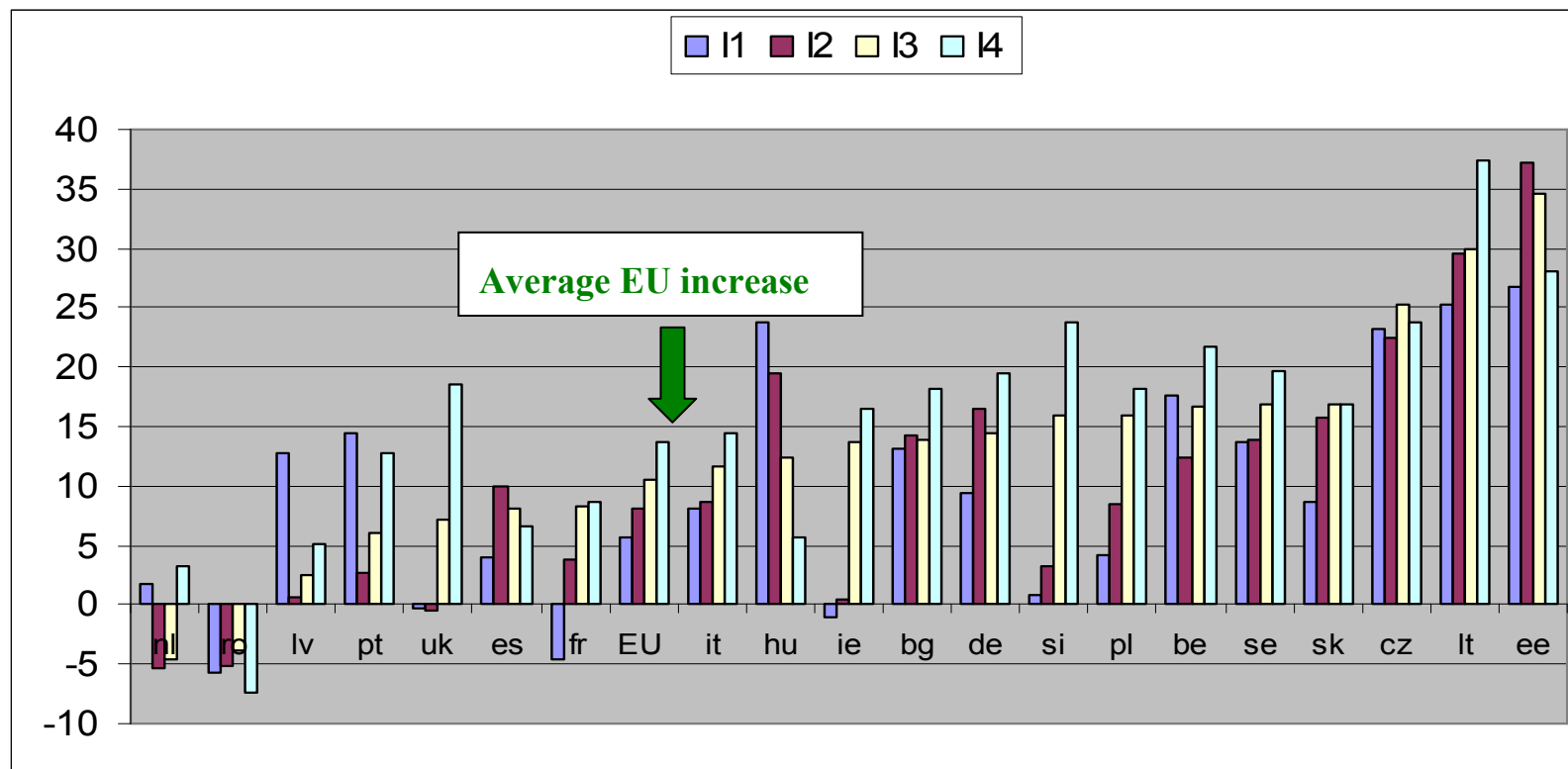


Table 5.13 Overview % increases of end prices 2007 s02 – 2008 s01 per Member State

<i>Household consumers</i>						<i>Industrial consumers</i>						
	<i>electricity</i>		<i>gas</i>				<i>electricity</i>		<i>gas</i>			
	<i>DC</i>	<i>DD</i>	<i>D1</i>	<i>D2</i>	<i>D3</i>		<i>IC</i>	<i>ID</i>	<i>I1</i>	<i>I2</i>	<i>I3</i>	<i>I4</i>
Austria	1,27	0,43	28,78	35,78	28,00	Austria	15,89	17,25	na	na	na	na
Belgium	16,64	17,80	11,24	16,79	22,67	Belgium	15,83	14,44	17,57	12,32	16,62	21,66
Bulgaria	-1,66	-0,84	5,62	9,64	9,49	Bulgaria	-0,89	-2,00	13,06	14,23	13,96	18,23
Czech Republic	18,44	20,86	20,79	21,29	23,76	Czech Republic	15,75	17,35	23,16	22,53	25,24	23,81
Cyprus	13,35	13,39	na	na	na	Cyprus	2,63	2,70	na	na	na	na
Denmark	17,14	19,08	na	na	na	Denmark	2,61	2,89	na	na	na	na
Estonia	-1,99	-3,04	-1,56	19,68	20,93	Estonia	-0,77	-0,69	26,73	37,23	34,58	28,12
Finland	5,41	5,41	na	na	na	Finland	9,06	8,55	na	na	17,46	12,90
France	0,00	0,00	-2,81	0,90	4,12	France	12,60	11,54	-4,64	3,75	8,27	8,64
Germany	1,56	-0,93	10,78	5,05	1,60	Germany	3,91	8,12	9,31	16,41	14,40	19,46
Greece	6,33	3,55	na	na	na	Greece	9,13	9,51	na	na	na	na
Hungary	33,44	28,77	8,27	5,82	5,81	Hungary	12,74	13,34	23,68	19,47	12,34	5,64
Ireland	-7,75	-9,30	-36,87	-10,44	-0,78	Ireland	5,43	10,59	-1,03	0,46	13,68	16,50
Italy	na	na	-2,22	8,02	4,64	Italy	na	na	8,11	8,68	11,71	14,53
Latvia	15,56	13,99	12,07	12,86	13,13	Latvia	11,11	17,23	12,76	0,69	2,58	5,19
Lithuania	-1,09	-2,28	41,59	40,31	55,15	Lithuania	11,42	11,80	25,33	29,57	29,99	37,40
Luxemburg	0,00	0,00	17,20	61,66	18,40	Luxemburg	0,00	na	18,40	15,54	22,29	na
Malta	0,00	0,00	na	na	na	Malta	0,00	0,11	na	na	na	na
Netherlands	-1,55	0,84	1,08	2,38	2,23	Netherlands	0,00	8,86	1,70	-5,27	-4,57	2,89
Poland	-9,73	7,44	7,37	3,75	6,39	Poland	-3,44	22,68	4,27	8,51	15,92	18,25
Portugal	-5,11	-11,11	-2,70	-4,21	5,04	Portugal	14,89	15,62	14,46	2,74	5,99	12,85
Romania	-7,23	-9,47	-6,25	-5,75	-5,73	Romania	-2,42	-0,89	-5,68	-5,22	-3,76	-7,45
Slovakia	3,65	8,68	14,45	3,26	-2,12	Slovakia	14,22	13,76	8,66	15,79	16,82	16,81
Slovenia	5,81	6,39	9,51	10,46	8,05	Slovenia	3,67	4,65	0,89	3,25	15,90	23,86
Spain	-2,43	-3,50	1,73	-1,03	0,78	Spain	0,33	0,63	4,00	9,92	8,02	6,57
Sweden	7,11	1,56	-2,26	2,73	-0,68	Sweden	5,68	6,41	13,76	13,85	16,80	19,69
UK	-1,20	1,02	9,20	5,58	20,04	UK	-9,29	-6,84	-0,24	-0,57	7,10	18,51
EU average	1,85	1,94	5,08	5,00	7,38	EU average	4,05	6,59	5,60	8,12	10,45	13,64

Based on Δ % calculations in previous tables. Legend: No fill + white = increase in line with EU-average; fill + white = increase well below EU-average; fill + black = increase well above EU average.

6. NETWORK ACCESS

Table 6.1 Network Access: Electricity 2007

	Number of regulated transmission companies	Number of regulated distribution companies	Approx network tariff large users €/MWh	Approx network tariff low voltage commercial €/MWh	Approx network tariff low voltage household €/MWh
Austria	3	130	10,2	48,4	50,7
Belgium	1	26	9	62	49
Bulgaria		4			
Cyprus	1	1	34,94	34,94	49,39
Czech Rep.	1	3	1,576	44,85	40,86
Denmark	2	101	12,1	27,2	47,2
Estonia	1	40	12,99	28,27	39,21
Finland	1	89	4,1	23,2	39,2
France	1	148	12,6	40,2	41,9
Germany	4	855	15,1	54	62,8
Greece	1	1	3,75	22,5	4,21
Hungary	1	6	9,23	54,56	38,89
Ireland	1	1	NA	NAP	NAP
Italy	11	163	13,95	50,85	84,45
Latvia	1	10	3	20	40
Lithuania	1	2	25,98	56,62	56,62
Luxembourg	1	9	7,68	28,96	73,76
Malta	NA	NA	NA	NA	NA
Netherlands	1	8	NA	NA	44,44
Norway	1	159	13,7	24,1	72,3
Poland	1	18	17,69	70,66	48,43
Portugal	3	13	4,08	38,71	39,47
Romania		30	NA	48,04	59,06
Slovakia	1	3	42,4	42,4	42,4
Slovenia	1	1	8,98	55,82	44,04
Spain	1	329	3,8	28,2	31,6
Sweden	1	175	7,64	28,54	48,81
UK	1	18	NA	NA	32,94

Source: Regulators data

Note:

1. Regulated transmission companies regulated: Charges are estimated excluding all taxes and levies. Both transmission and distribution charges are included,

2. Large users:

Denmark: TSO owned by network companies were handed over to the state as part of a broader mutual agreement and merged into a national TSO-Energinet.dk also covering gas

German: as of 12 June 2008

Hungary: Legally there are 6 DSO, but considering the DSO ownership structure, there are just 3 proprietary groups

Italy: Owner companies

Luxembourg: Based on the law, the TSO "Sotel reseau et Cie S.e.s.c." is considered being an "industrial system operator"

Portugal: Mainland of Portugal and Islands of Azores and Madeira

3. Low voltage commercial:

CZ: costumers on VHV level

Germany: As of 1 of April

Portugal: from September to December the value was 1,99 €/MWh

Romania: data for the second semester

4. Low voltage households: Overage

Table 6.2 Composition of electricity prices 2007

HOUSEHOLDS						
Composition of the household prices in € per 100 kWh					Share in price <u>without tax</u> (%)	
	Total price	Energy&supply	Network costs	Taxes&levies	Energy&supply	Network costs
Poland	13,80	3,59	7,10	3,10	33,6	66,4
Romania	11,41	3,46	6,08	1,87	36,3	63,7
Denmark	24,01	4,16	6,16	13,69	40,3	59,7
Lithuania	8,70	3,13	4,16	1,41	43,0	57,0
Luxemburg	15,91	6,15	8,06	1,70	43,3	56,7
Estonia	7,86	2,88	3,64	1,34	44,1	55,9
Slovakia	13,70	5,55	5,97	2,18	48,2	51,8
Sweden	16,13	5,11	5,03	5,99	50,4	49,6
Germany	21,05	6,61	6,18	8,26	51,7	48,3
Latvia	7,29	3,59	3,34	0,35	51,8	48,2
Belgium	16,83	7,01	5,85	3,97	54,5	45,5
Finland	11,49	4,75	3,92	2,82	54,8	45,2
Czech Republic	10,63	5,00	3,95	1,68	55,9	44,1
Bulgaria	7,21	3,37	2,66	1,18	55,9	44,1
Hungary	12,96	5,69	3,87	3,40	59,5	40,5
Malta	9,93	7,23	2,20	0,50	76,7	23,3

Source: Eurostat

Table 6.3 Access Conditions to Gas Transmission networks

Transmission				
	Tariff model	Congestion management	Capacity allocation mechanism	Balancing model applied
Austria	3	NAP	5	2,3
Belgium	1,2,3	1,2,3,4,5,6,7,8	1,2,3,4,5	1,2,3
Bulgaria				
Cyprus	NAP	NAP	NAP	NAP
Czech Rep.	2,3	2,6,7	3	2
Denmark	entry-exit uncoupled	UIOLI; secondary market, Interruptible capacity	First come first served, pro rata	TSO uses storage for balancing-TSO contracts sources of balancing gas
Estonia	1	-	1	NAP
Finland	3	NAP	NAP	2
France	entry-exit uncoupled,2	Auction, pro rata, UIOLI; secondary market, Interruptible capacity	First come first served, auction, pro rata, capacity goes with costumers	TSO buys balancing gas on the regular gas market, TSO uses storage for balancing
Germany	2	6,7	1	NA
Greece	NAP	5	1	2
Hungary	1	1+2+5+6	1+2+3	1+2+3
Ireland	2	6	1	2
Italy	2	2,6,7	3	3
Latvia	1	NAP	NAP	-
Lithuania	NAP	7	1	1
Luxembourg	1	NAP	1	1
Malta				
Netherlands	2	5,7	1	2
Norway				
Poland	3	2,5,6,7,8	1	2,3
Portugal	3	1,8	1,5	3
Romania	1	In order to settle the congestions, the approved but unused capacity may make up the object of a) voluntary return to the TSO b) capacity transfer facility CTF c) mandatory transfer from one network user to another by the TSO	1	3
Slovakia	2	TSO 5,6,7 DSO 2,6,8	1	1,2,3
Slovenia	One tariff	single 2	3	1
Spain	2	5	1	1
Sweden	2	-	5	2

UK	uncoupled	Capacity by back UIOLI Secondary market Interruptible capacity	Auction, first come first based, Capacity goes with the costumer,	2.87
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Source: Regulators' submissions

Note:

Tariff model (1- entry exit coupled, 2- entry exit uncoupled, 3- point-to point);

Congestion management (1- auction, 2-pro rata, 3- lottery 4- capacity by back, 5- UIOLI, 6- secondary market, 7- Interruptible capacity, 8- use it or sale it);

Capacity allocation mechanism (1- first come first served, 2- auction, 3- pro rata, 4- allocation on deadline, 5- capacity goes with the costumer);

Balancing model applied (1- TSO buys balancing gas on the regular market, 2- TSO contracts sources of balancing gas, 3- TSO uses storage for balancing).

Table 6.4 Regulated companies and access charges: Gas

	Number of regulated transmission companies	Number of regulated distribution companies	Approx network tariff large users (standard consumer I4=annual consumption of 418.6 GJ (€kWh))	Approx network tariff medium commercial (standard consumption I1=annual consumption of 0,4186TJ (€kWh))	Approx network tariff small commercial/ household (standard consumer D3= annual consumption of 83,7 GJ)
Austria	7	20	NAP	0,8678	1,2933
Belgium	1	18	0,13	0,95	1,3
Bulgaria	-	-	NAP	NAP	-
Cyprus	NAP	NAP	NA	NAP	NAP
Czech Rep.	1	69	0,236	0,4932	0,5685
Denmark	1	4	0,38	1,39	1,39
Estonia	1	27	0,151	0,151	0,537
Finland	1	32	0,68	NA	NA
France	2	23	0,101	0,938	0,132
Germany	20	697	0,17	0,93	0,118
Greece	1	4	0,41	1,44	1,51
Hungary	1	10	0,348	0,725	0,791
Ireland	1	1	NAP	NAP	NAP
Italy	2	338	0,1673	0,7863	1,0452
Latvia	1	1	0,51	1	1
Lithuania	1	6	0,384	0,659	0659
Luxembourg	1	4	0,117	0,462	0,738
Malta	NAP	NAP	NAP	NAP	NAP
The Netherlands	1	12	NA	NA	0,85
Norway	NAP	NAP	NAP	NAP	NAP
Poland	1	7	0,3878	0,0886	1,0781
Portugal	1	11	NA	NA	NA
Romania	1	36	NA	NA	NA
Slovakia	1	48	0,36	0,0912	2,86
Slovenia	1	17	0,2031	NA	1,4070
Spain	8	22	0,2629	0,132	2,3050
Sweden	3	5	0,36	NA	2,18
UK	1	8	NA	NA	0,76

Source: Regulators data

Note:

1. Categories of users: Large users – prices for standard consumer I4 = annual consumption of 418,6 TJ; medium commercial – prices for standard consumer I1 = annual consumption of 0,4186 TJ; small commercial and households – prices for standard consumer D3 = annual consumption of 83,7 GJ.
2. Italy: number of regulated transmission companies: 3 other companies own small regional network stretches.
3. Sweden: no large users.
4. Network tariffs include metering costs excluding levies and taxes.

7. UNBUNDLING

Table 7.1 Unbundling of Network Operators: Electricity Transmission

	Unbundling implemented?			TSO with network assets	
	Ownership unbundling	Public Ownership	Private ownership	with	without
Austria	0	51	49	1	2
Belgium	0	35,55	64,45	1	0
Bulgaria	0	100	0	0	0
Denmark	1	100	0	1	0
Finland	1	12	88	1	0
France	0	84,8	15,2	1	0
Germany	0	0	100	4	0
Greece	0	51	49	1	1
Ireland	1	100	0	1	0
Italy	1	30	70	11	0
Luxembourg	0	32,8	67,2	0	1
Netherlands	1	100	0	NA	NA
Portugal	1	51	49	1	0
Spain	1	20	80	1	0
Sweden	1	100	0	1	0
UK	1	0	100	1	0
Norway	1	100	0	1	0
Estonia	0	100	0	1	0
Latvia	0	0	100	0	1
Lithuania	1	96,6	3,4	1	0
Poland	1	100	0	0	1
Czech Rep.	1	100	0	1	0
Romania	1	100	0	1	0
Slovakia	1	100	0	1	0
Hungary	0	0,01	99,09	1	NAP
Slovenia	1	100	0	1	0
Cyprus	0	100	0	0	1
Malta	-	-	-	-	-
Total Compliance / 28	16				

Source: Regulators data

Table 7.2 Unbundling of DSO in Electricity

DSO ELECTRICITY				
	NUMBER OF DSOS	NUMBER OF DSOS LEGALLY UNBUNDLED	APPLICATION OF 100.000 CUSTOMER EXEMPTION	NUMBER OF DSOS WITH LESS THAN 100.000 CUSTOMERS
AUSTRIA	130	11	YES	119
BELGIUM	26	26	NO	14
BULGARIA	4	4	NO	1
CYPRUS	1	0	YES	0
CZECH REPUBLIC	280	3	YES	277
DENMARK	101	101	NO	96
ESTONIA	40	1	YES	39
FINLAND	89	50	NO	83
FRANCE	148	0	YES	143
GERMANY	855	150	YES	779
GREECE	1	0	NO	0
HUNGARY	6	6	NO	0
IRELAND	1	0	NO	0
ITALY	163	NAP ¹³	YES	152
LATVIA	10	1	YES	9
LITHUANIA	7	2	YES	5
LUXEMBOURG	9	2	YES	8
NORWAY	159 ¹⁴	55	YES	152
POLAND	18	14	YES	4
PORTUGAL	13	11	YES	10
ROMANIA	30	7	YES	22
SLOVAK REPUBLIC	154	3	YES	151
SLOVENIA	1	1	NO	0
SPAIN	329	329	YES	323
SWEDEN	175	175	YES	158
THE NETHERLANDS	8	8	NO	5
UNITED KINGDOM	18	18	NO	4

Sources: CEER Data base /National reports

¹³ In Italy the obligation of legal unbundling for DSOs entered into force for utilities serving more than 100,000 clients from the 1st January 2008

¹⁴ DSOs are mainly held in public ownership

Table 7.3 Unbundling of Network Operators: Gas Transmission

<i>GAS TSOS</i>		
	<i>NUMBER OF TSOS</i>	<i>NUMBER OF TSOS OWNERSHIP UNBUNDLED</i>
<i>AUSTRIA</i>	7	0
<i>BELGIUM</i>	1	0
<i>BULGARIA</i>	1	0
<i>CYPRUS</i>	<i>NAP</i>	<i>NAP</i>
<i>CZECH REPUBLIC</i>	1	0
<i>DENMARK</i>	1	1
<i>ESTONIA</i>	1	0
<i>FINLAND</i>	1	0
<i>FRANCE</i>	2	0
<i>GERMANY</i>	20	1
<i>GREECE</i>	1	0
<i>HUNGARY</i>	1	1
<i>IRELAND</i>	1	0
<i>ITALY</i>	2 ¹⁵	1
<i>LATVIA</i>	1	0
<i>LITHUANIA</i>	1	0
<i>LUXEMBOURG</i>	1	0
<i>MALTA</i>		
<i>POLAND</i>	1	1
<i>PORTUGAL</i>	1	1
<i>ROMANIA</i>	1	1
<i>SLOVAK REPUBLIC</i>	1	0
<i>SLOVENIA</i>	1	0
<i>SPAIN</i>	8	1
<i>SWEDEN</i>	3	2
<i>THE NETHERLANDS</i>	1	1
<i>UNITED KINGDOM</i>	1	1

Sources: CEER Data base /National reports

¹⁵ The unbundled company Società Gasdotti SpA owns approximately 5% of the national network.

Table 7.4 Unbundling of Network Operators: Gas Distribution

GAS DSOS				
	NUMBER OF DSOS	NUMBER OF DSOS LEGALLY UNBUNDLED	APPLICATION OF 100.000 CUSTOMER EXEMPTION	NUMBER OF DSOS WITH LESS THAN 100.000 CUSTOMERS
AUSTRIA	20	8	YES	14
BELGIUM	18	18	NO	9
BULGARIA	40	0	YES	40
CYPRUS	NAP	NAP	YES	
CZECH REPUBLIC	69	8	YES	61
DENMARK	4	4	NO	2
ESTONIA	27	1	YES	27
FINLAND	32	0	YES	32
FRANCE	23	0	YES	20
GERMANY	697	145	YES	668
GREECE	4	0	NO	1
HUNGARY	10	5	YES	5
IRELAND	1	0	NO	0
ITALY	338	338	YES	264
LATVIA	1	0	NO	0
LITHUANIA	6	0	YES	5
LUXEMBOURG	4	0	YES	4
MALTA				
POLAND	7	6	YES	1
PORTUGAL	11	11	YES	7
ROMANIA	36	36	YES	34
SLOVAK REPUBLIC	48	1	YES	47
SLOVENIA	17	0	YES	17
SPAIN	22	22	NO	16
SWEDEN	5	5	YES	5
THE NETHERLANDS	12	12	NO	7
UNITED KINGDOM	8	5	NO	0

Sources: CEER Data base /National reports

8. SUPPLY – DEMAND BALANCE

Table 8.1 Electricity generation 2007

MW	annual demand including losses without pumped storage	final losses	Peak load	Maximum net generating capacity	Total generation volume	net
Austria	61,744		10,477	19,400	63741	
Belgium	90,109		14,040	16,363	84,792	
Bulgaria						
Cyprus	4,851		1,056	1,129	4,584	
Czech R	72,04		11,056	17,561	81412,7	
Denmark	35,7		6,4	12,7	37400	
Estonia	8,534		1,537	2,057	10954	
Finland	90,3		14,9	13,3	77700	
France	480,3		89	115,5	544700	
Germany	569,2		78,5	143,3	597300	
Greece	55,25		10,610	11,871	56300	
Hungary	37,25		6,602	6,872	37220,11	
Ireland	6,8					
Italy	339,9		56,8	79,4	301299	
Lithuania	9,1		2,5	2,684	12,2	
Luxembourg	6,413		1,086	0,584	3157	
Malta	121,5					
Netherlands	112		NA	21	99349000	
Norway	125,8		21,450	30,303	137400	
Poland	154,2		24,6	26,90	159528	
Portugal	50,05		9,11	14,041	43,102	
Romania				18,4	61390	
Slovakia	29,632		8,681	7,508	27,907	
Slovenia	13,864		2,060	3,006	13636	
Spain	276,3		44,78	90,72	286588	
Sweden	157,4		24,5	34,07	145087	
UK	350,08		606	78,4	354000	

Source: Regulators data

1. Total generation capacity: maximum net generating capacity. IEA definition: the national maximum generating capacity is defined as the sum of all individual plants' maximum net capacity available during a period of at least 15 hours per day. Net capacity is without auxiliary services.

2. Slovak Republic: Total generation capacity includes auxiliary services, which represent ca. 1 GW.

3. Sweden: Total generation capacity figures refer to total installed capacity.

4. Denmark: Sum of Denmark West and Denmark East.

Table 8.2 Gas Security of Supply

	Total consumption in 2007 TWh/yr	National production per year TWh/yr
Austria	88,2	20,3
Belgium	189,3	0,0
Bulgaria		
Czech Republic	91,3	1,0
Denmark	40,0	90,0
Estonia	9,4	0,0
Finland	45,0	0,0
France	498,5	10,9
Germany	991,2	166,5
Greece	42,6	0,0
Hungary	124,3	24,3
Ireland	4858,0	NA
Italy	898,4	102,6
Latvia	1,7	0,0
Lithuania	33,1	0,0
Luxembourg	15,0	0,0
Netherlands	400,0	709,0
Poland	152,3	47,5
Portugal	48,9	0,0
Romania	NAP	NAP
Slovak Republic	59,8	1,3
Slovenia	11,8	0,0
Spain	108,0	1,4
Sweden	11,7	0,0
United Kingdom	100,0	73,0
Cyprus	NAP	NA
Malta	NA	NA
Norway	NA	NA

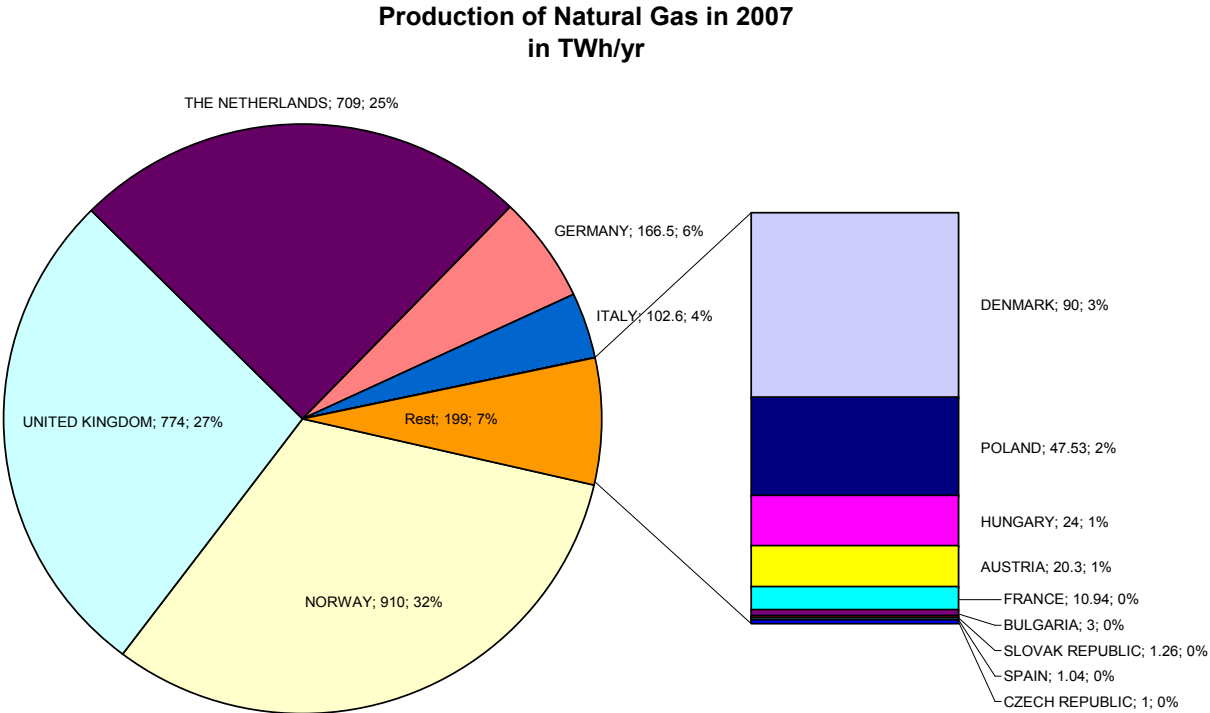
Source: Regulators data

Figures are only indicative and do not fully match due to inconsistent statistical approaches

Note:

1. Total consumption: Gross inland consumption = production + imports – exports + storage variations.
2. Lithuania: total consumption only import.

Table 8.3 Production of natural gas in EU and Norway (2007)



Source: CEER Database

Table 8.4 LNG 2007

	Total LNG import capacity	LNG import capacity free	LNG gas volume flow into the country
	In TWh/h	TWh/h	TWh/yr
Austria	NAP	NAP	NAP
Belgium	0,007	NA	28,6
Bulgaria	-	-	
Cyprus	NAP	NAP	NAP
Czech Rep.	NAP	NAP	NAP
Denmark	0	NAP	NAP
Estonia	0	0	0
Finland	0	0	0
France	0,029	0,003	114,7
Germany	0	0	0
Greece	0,0029	0,0017	9,59
Hungary	NAP	NAP	NAP
Ireland	NAP	NAP	NAP
Italy	0,0048402	0,0028903	25,72
Latvia	0	0	0
Lithuania	0	0	0
Luxembourg	NAP	NAP	NAP
Malta			
Netherlands	NA	NA	NA
Norway			
Poland	NA	NA	NA
Portugal	0,00714	NA	31,5
Romania	NAP	NA	NAP
Slovakia	0	0	0
Slovenia	0	0	0
Spain	0,072	0,023	281
Sweden	0	0	0
UK	93,5	NA	14,9

Source: Regulators data

Note:

1. Changes in stocks: (-) injection, (+) withdrawal.

Conversation factors

1 PJ (GCV) = 25,6 million m³ gas

1 m³ of natural gas = 39 mega joules (MJ – GCV) = 10,8 kWh

1 Mtoe = 1 million tones of oil equivalent = 41,86 PJ (NCV)

1000 m³ of natural gas = 0,9 ton oil equivante (toe – crude oil)

1 BCM = 1 billion cubic meters

1 cubic meter (m³) = 35,315 cubic feet (cf)

1 million m³ of LNG = 593 million m³ of gas

Net Caloric value (NCV) = 0,9 Gross calorific value (GCV)

1 megajoule = 10⁶ joules (MJ)

1 gigajoule = 10⁹ joules (GJ)

1 terajoule = 10¹² joules (TJ)

1 petajoule = 10¹⁵ joules (PJ)