

**Gas Industries and Utilities
of the World
2006
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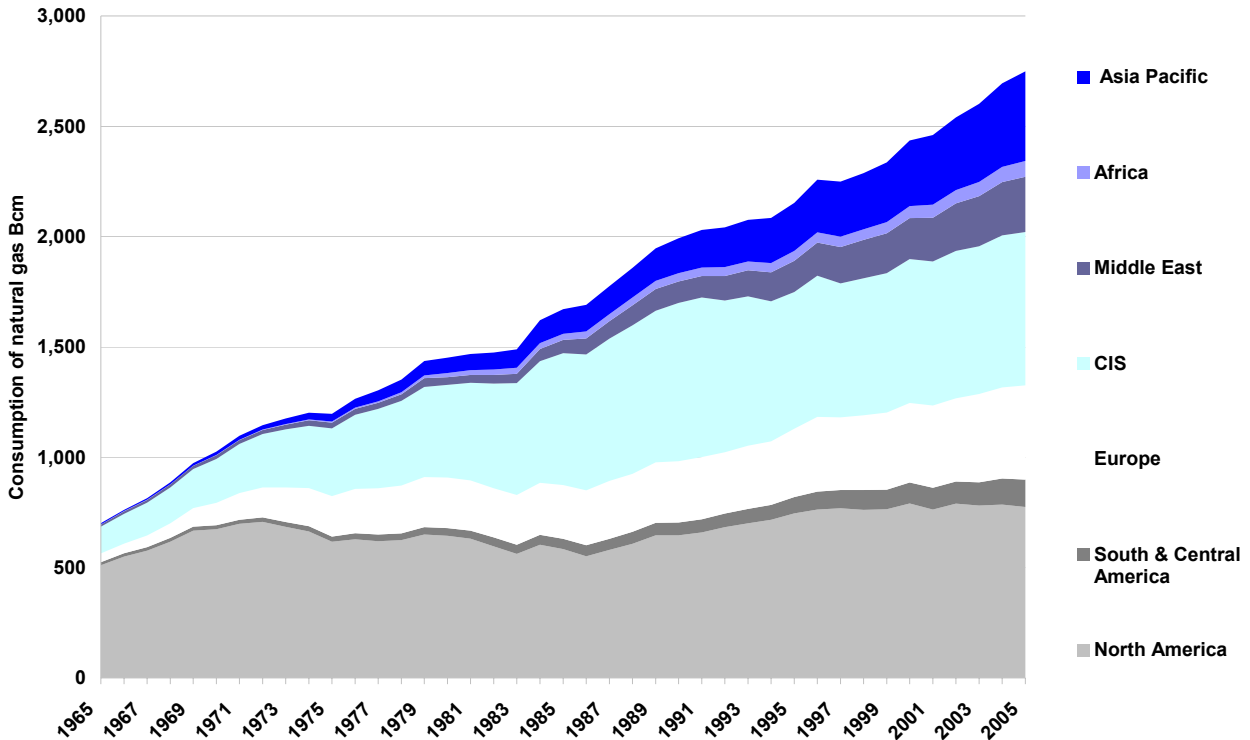
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The Global Market

World natural gas consumption has increased from 702 Bcm (Billion cubic metres) per year in 1965 to 2,750 Bcm in 2005. There have been increases in every region of the world except for the former Comecon countries of the FSU and Eastern Europe. Following the collapse of the Soviet Union and the centrally controlled economies of the Eastern bloc the consumption of energy declined sharply in the early 1990s, but has resumed growth.

Figure 1: Consumption of natural gas 1965 to 2005 by region, Bcm



Source: BP Statistical Review of World Energy 2006

There is a vast disparity in the volume of energy produced and consumed in the various regions of the world. 5% of the world population consumes over 26% of the energy in North America, creating the highest per capita use in the world. The United States and Russia are the two giants of the natural gas world, being the highest and second highest producers and consumers in the world. The USA is the largest consumer of natural gas and the second largest producer, while Russia is the largest producer but the second largest consumer, consuming 64% of the amount used by the USA.

While exports in North America remain in that continent, primarily consisting of Canadian exports to the US, Russia is the largest exporter of natural gas in the world.

Europe is the third largest consuming region, but accounts for less than 9% of production.

By contrast, the people of Asia, half of the global population, consume 15% of the total and have under one tenth the per capita amount used in North America. Not surprisingly the 12.3% of the population that live in Africa have the lowest per capita primary energy consumption at 485 cm per annum.

Albania

Economic Profile

Population mn mid-2005	4 mn
Labour force mn 2004	1.09 mn
Unemployment % 2004	14.4%
Capital	Tirana
GDP per capita \$ PPP 2005	\$4,900
Reserves of foreign exchange and gold \$ bn 2005	\$1.5 bn
Inflation % 2005	2.5%
GDP \$ bn 2005	\$21.5 bn
GDP \$ bn 2005 Official exchange rate	\$8.7 bn
GDP growth % 2005	6%
Composition of GDP %	
Agriculture	46.2%
Industry	25.4%
Services	28.4%
Exports \$ mn 2005	\$708.8 mn
Imports \$ bn 2005	\$2.5 bn

Gas Statistics

Natural Gas bcm 2004	
Reserves	2
Production	0
Imports	0
Exports	0
Consumption	0
LNG Imports	0
LPG consumption 000 b/d	1

Principal gas company

Imports, transmission and distribution	National Agency for Energy
--	----------------------------

Economic Overview

Albania was one of the most isolated and politically extreme of the communist countries, frequently described as the last Stalinist state, until the collapse of the Eastern Bloc system in 1990. It was the last to give in to popular pressure.

Lagging behind its Balkan neighbours, Albania is now making the difficult transition to a more modern open-market economy. The government has taken measures to curb violent crime and to spur economic activity and trade. The economy is bolstered by annual remittances from abroad of \$600-\$800 million, mostly from Greece and Italy; this helps offset the towering trade deficit. Agriculture, which accounts for about one-quarter of GDP, is held back because of frequent drought and the need to modernise equipment, to clarify property rights, and to consolidate small plots of land. Energy shortages and antiquated and inadequate infrastructure contribute to Albania's poor business environment, which make it difficult to attract and sustain foreign investment. The planned construction of a new thermal power plant near Vlore and improved transmission and distribution facilities will help relieve the energy shortages. Also, the government is moving slowly to improve

the poor national road and rail network, a long-standing barrier to sustained economic growth. On the positive side: growth was strong in 2003-05 and inflation is not a problem.

GAS INDUSTRY CHARACTERISTICS

Gas market

In the 1980s, the petroleum and bitumen enterprises employed 10% of Albania's industrial work force, controlled 25% of the country's industrial capital and received almost 33% of its industrial investment funds. Nevertheless, the industry's share of the country's gross industrial production fell from 8.1% in 1980 to 6.6% in 1982 and to perhaps as little as 5% in 1985.

Petroleum was the first industry to attract direct foreign investment after the communist economic system broke down. In 1990 and 1991, the Albanian Petroleum and Gas Directorate entered into negotiations with foreign drilling and exploration firms for onshore and offshore prospecting. In March 1991, the Albanian government and a German company, Denimex, signed a US\$500 million contract for seismological studies, well drilling, and production preparation. Albania also negotiated exploration contracts with Agip of Italy and Occidental Petroleum, Chevron, and Hamilton Oil of the United States.

Almost all infrastructure, the railways, roads, energy utilities, water and canals are still owned by the state and years of civil unrest have left them in economic chaos. The ministry responsible for gas is the National Agency for Energy.

According to a World Bank study, gas is expected to come into commercial operation in Albania by 2008.

The state-owned gas company is Servcom, however, the Albanian government announced in October 1999 that it would launch sale procedures for several large state-owned companies, including Servcom.

Production

The country's gas industry centres on 11 fields but output is low and imports are required to meet domestic needs. The government is anxious to develop its gas industry, and under EC-Phare's Multi-Country Energy Programme it is being encouraged to do so.

Fertiliser plants consume about 40% of Albania's annual natural gas production.

Transportation

Albania is the only country in Europe which is not connected to an international gas pipeline. Studies done so far in the gas field were aimed at remedying this situation via the identification of different alternatives to connect Albania with the European gas network.

As gas resources reach depletion, several options exist for Albania. Gas could be supplied from Russia via Macedonia which would require an extension of the existing gas pipeline currently ending at Skopje. Russian gas could also be supplied through Greece. Another option is gas from North Africa or the European grid via Southern Italy (Otranto) towards Greece to link up with the existing network near Larissa. For Albania, such a link to the Trans-European Network would require a connection line approximately 140 km to the south passing through Igoumenitsa, which is the landing point of the offshore pipeline from Southern Italy. The final option would be Caspian gas.

The gas network infrastructure has had a larger extension than the oil infrastructure. This larger extension runs from Durres to Delvina, which creates the possibility for the close-

by consumers to connect with the network. The total length of the pipeline network has a length of 498 km.

Currently, gas infrastructure in many places is out of operation and needs rehabilitation. Due to the low level of gas production, some of the pipelines are unable to transport gas at all due to their continuous corrosion and destruction.

Distribution

Some private companies provide gas through foreign, not domestic sources, mainly from Italy. One of the biggest companies offering gas in Albania is IAP gas, which has its branches in the most developed cities of Albania.

Electricity generation with gas

Power stations consume about 15% of Albania's natural gas.

Natural gas demand for power generation by 2015 is expected to be .98 Bcm of total forecast demand of 1.1 Bcm.

Austria

Economic Profile

Population mn mid-2005	8 mn
Labour force mn 2005	3.5 mn
Unemployment % 2005	5.1%
Capital	Vienna
GDP per capita \$ PPP 2005	\$32,900
Reserves of foreign exchange and gold \$ bn 2004	\$12.2 bn
Inflation % 2005	2.3%
GDP \$ bn 2005	\$269.5 bn
GDP \$ bn 2005 Official exchange rate	\$302.7 bn
GDP growth % 2005	1.9%
Composition of GDP %	
Agriculture	2.3%
Industry	30.8%
Services	66.9%
Exports \$ bn 2005	\$122.5 bn
Imports \$ bn 2005	\$118.8 bn

Gas Statistics

Natural Gas bcm 2004	
Reserves	20
Production	2
Imports	8
Exports	1
Consumption	9
LNG Imports	0
LPG consumption 000 b/d	6

Principal Gas Companies

Production, exploration, imports, transmission	OMV Aktiengesellschaft Rohoel-Aufsuchunug GmbH
Provincial distributors Landes-Ferngas-Gesellschaften (LFGs)	9
Regional distributors	16

Economic Overview

Austria, with its well-developed market economy and high standard of living, is closely tied to other EU economies, especially Germany's. The economy features up-to-date industrial and agricultural sectors. Timber is a key industry, 47% of the land area being forested. Membership in the EU has drawn an influx of foreign investors attracted by Austria's access to the single European market and proximity to the new EU economies. To meet increased competition from both EU and Central European countries, particularly the new EU members, Austria will need to emphasise knowledge-based sectors of the economy, continue to deregulate the service sector, and encourage much greater participation in the labour market by its aging population. The aging phenomenon, together with already high health and pension costs, poses fundamental problems in tax and welfare policies.

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