

Summary for D2.4 - List of Key Actors on the gas market in the MADEGASCAR regions

D2.5

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Introduction

There are many different types of key actors on the gas market. The table below shows the classification that was used when listing the key actors in the MADEGASCAR partner regions.

Field	Key actor classification
Supply	Energy companies/gas suppliers
	Companies that owns and runs biogas plants
	Companies that build biogas plants
	Companies that sell/produce/develop components for biogas plants
	Companies with potential to produce biogas
Treatment and Distribution	Owners of biogas upgrading plants
	Owners of gas filling stations
	Gas net owners
	Companies that sell/produce/develop components for biogas upgrading plants
Utilisation	Vehicle manufacturers
	Vehicle salesmen/car-dealers
	Major vehicle fleet owners
	Companies that convert petrol vehicles to run on gas
	NGV service stations
LPG	Companies that can convert LPG vehicles to run on methane gas
Other	Research institutes
	Municipalities
	Local, regional and national authorities
	Non-profit organizations

The objective behind making a list over the key actors on the gas market was first of all to get a clear picture of the market. The gathered information have later on been used in the other MADEGASCAR activities such as building up a regional network with actors to collaborate with and also to find actors (target groups) to try to influence with the final aim at increasing the number of NGV's in the partner regions.

Results from listing key actors in gas market

This common document shows the result of the inventory made of the identified key actors in the MADEGASCAR partner regions.

The key actors have been divided into five different actor groups, depending on their role on the gas market. The main groups are:

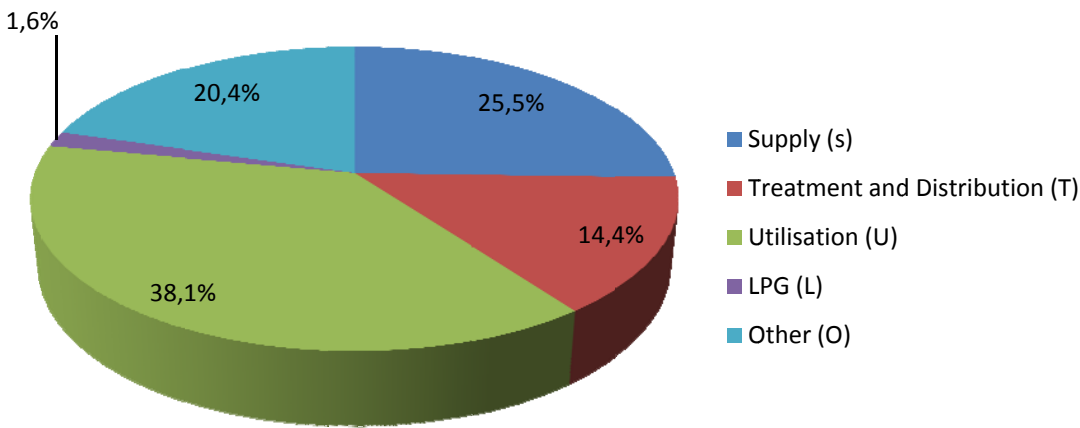
- Supply
- Treatment and Distribution
- Utilisation
- LPG
- Others

The actors have also been divided into 19 sub groups under the main categories, to be able to find actors operating within a specific field. For example, the group for supply have been divided into the following 5 sub groups:

Supply	Energy companies/gas suppliers
	Companies that owns and runs biogas plants
	Companies that build biogas plants
	Companies that sell/produce/develop components for biogas plants
	Companies with potential to produce biogas

A total of 675 Actors have been listed in the ten MADEGASCAR partner countries, with the following division:

Key actors on the gas market in the MADEGASCAR Countries



The largest number of listed actors was found in the Utilisation category. Within this category the largest numbers of actors are vehicle manufacturers, car resellers and vehicle fleet owners. Only a small number of NGV service stations and companies converting petrol cars to NGV's have been listed in the documents.

Based on number of listed actors, the group of Utilisation is followed by the groups working in the fields of; Supply, Other and Treatment and Distribution. The LPG category contains only a small number of listed actors in the partner regions.

The actors in the Supply and Other categories are more evenly spread between the different sub groups. In the Supply category the number of companies working with development and production of biogas components is significant less than the other four categories.

In the category of Treatment and Distribution the vast majority of the listed actors are companies running CNG filling stations.

Key Actor Field	Sweden	Austria	Spain	Slovenia	Lithuania	Poland	Bulgaria	United Kingdom	Germany	Czech rep.	TOTAL
Supply (s)	26	14	8	5	9	49	4	12	6	39	172
Treatment and Distribution (T)	21	18	4	5	0	14	6	12	8	9	97
Utilisation (U)	18	71	4	0	3	71	12	12	41	25	257
LPG (L)	1	1	0	0	6	0	0	3	0	0	11
Other (O)	63	10	17	2	4	13	11	8	5	5	138
Total	129	114	33	12	22	147	33	47	60	78	675

Table 1. The number of listed key actors in the MADEGASCAR regions, presented per country and main actor group.

When analysing the number of listed actors per MADEGASCAR region it is shown that the region with the largest number of actors is the Czech region, followed by the Polish, Swedish, German and Austrian regions. Least actors have been listed in the Maribor region in Slovenia. The number of listed actors in the regions corresponds roughly to the situation of the gas market in the regions at the start of the MADEGASCAR project. Regions with a well developed market for NGV's, CNG and biogas has a bigger range of companies working on the gas market. The partners from these regions have in general also listed more key actors than the partners from regions with a less developed gas market.