



## Platts 7<sup>th</sup> European Gas Summit

19 - 20 September, Vienna, Austria

**Platts European Gas Summit** continues to go from strength to strength and has established itself as a key fixture in the European gas industry calendar. Now in its seventh year, this important conference will once again provide a platform for the region's leading gas companies, TSOs, regulatory bodies, industry associations, traders and analysts to meet to discuss and debate the future of an industry experiencing significant changes and facing huge challenges.

As the leading provider of pricing news and analysis for the global gas industry, Platts has an unrivalled track record in attracting industry leaders to its conferences. With long term supply from Russia still seen as the backbone of the industry, what will changes and developments there mean for Europe and when are we likely to see this taking place? Will we continue to see weak demand? Are fundamentals tightening and what impact will increased supply from the East have for the region? Will Europe ever see a real internal market for gas?

In addition to these strategic issues, attend **Platts European Gas Summit** to benefit from presentations in the following key areas:

- Overview of the internal market for gas and future challenges,
- The latest on the Southern corridor,
- Regulation: The legal issues surrounding the import of gas to Europe and the implications for the industry, outcomes from the Ten Year Network Development Plan (TYNDP) and network codes,
- LNG infrastructure and the challenge of attracting buyers,
- Sessions on storage, shale gas, gas supply infrastructure and more.

### Confirmed speakers:

- *Wim Groenendijk, Director Internal Affairs and Regulation, Gasunie*
- *Bjorn Brochmann, Head of Gas Research & Forecasts, Thomson Reuters*
- *Dr. Vladimir Drebensov Head of Russia & CIS Economics, BP, Vice President for Communications and External Affairs, BP Russia and Head of Representative Office in Russia, BP Trading*
- *John Baldwin, Vice President, Southern Corridor, BP*
- *Dr. Axel Wietfeld, Chairman of the Board, E.ON Foldgaz Storage*
- *John Williams, Senior Principal, Pöry Management Consulting*
- *Michael Hoffmann, External Affairs Director, Trans Adriatic Pipeline (TAP)*
- *Dimitrios Manolis, Director International Activities International Projects Monitoring, DEPA*
- *Christophe Poillon, Senior President, GRT Gaz*
- *Francisco de la flor Garcia, Director of Regulation, ENAGAS*
- *Dr. Gotz Lincke, Managing Director, PRISMA European Capacity Platform GmbH*
- *Kamil Blazek, Partner, Kinstellar*
- *Kristof Ferenczi, Partner, Kinstellar*
- *Walter Boltz, Executive Director, E-Control and Vice Chairman, Board of Regulators, Agency for Cooperation of Energy Regulators (ACER)*
- *James Henderson, Senior Research Fellow, Oxford Institute for Energy Studies*

- *Dr. Jonas Grätz* Researcher, Global Security Team Center for Security Studies (CSS), **ETH Zurich**
- *Ana Stanic*, Solicitor Advocate and Founder, **E&A Law** and Honorary Lecturer, **CEPML, University of Dundee**
- *Rokas Masiulis*, CEO, **Klaipedos Nafta**
- *Dr. Ashna Rahman*, Manager, Energy Analytics (Europe), **Bentek Energy**
- *Dr. Danila Bochkarev*, Senior Fellow, Energy, **EastWest Institute**
- *Piotr Kuś*, Director, **Gas Transmission Operator GAZ-SYSTEM S.A.**
- *William Powell*, Editor, **Platts**
- *John Roberts*, Energy Security Specialist, **Platts**

<b>Day one Thursday 19<sup>th</sup> September</b>	
08:15	<i>Registration and continental breakfast</i>
09:15	<i>Chairman's opening remarks</i> <i>Bjorn Brochmann, Head of Gas Research &amp; Forecasts, Thomson Reuters</i>
<b>EUROPEAN GAS MARKETS OVERVIEW</b>	
09:30	<p><b>Keynote address: The European gas landscape</b></p> <ul style="list-style-type: none"> <li>▪ The internal market for gas: are we getting there?</li> <li>▪ Infrastructure development: the need for a wider perspective</li> <li>▪ The competitive environment of gas in Europe: sunset or room for growth?</li> </ul> <p><i>Wim Groenendijk, Director Internal Affairs and Regulation, Gasunie</i></p>
09:55	<p><b>Gas pricing developments</b></p> <ul style="list-style-type: none"> <li>▪ Examining the distinction between pipeline gas and LNG pricing</li> <li>▪ Short and long-term contracts</li> <li>▪ Creating a single market</li> </ul> <p><i>William Powell, Editor, Platts</i></p>
<b>THE GAS TARGET MODEL</b>	
10:20	<p><b>The Gas Target Model: the European gas market for 2014 and beyond</b></p> <ul style="list-style-type: none"> <li>▪ Creating and connecting functioning wholesale markets</li> <li>▪ Securing supply patterns that ensure continuing gas flows to Europe</li> <li>▪ Determining the required economic investments and ensuring they happen</li> </ul> <p><i>Walter Boltz, Executive Director, E-Control and Vice Chairman, Board of Regulators, Agency for Cooperation of Energy Regulators (ACER)</i></p>
10:45	Refreshment Break
<b>RUSSIA: A KEY SUPPLIER OF GAS TO EUROPE</b>	
11:20	<p><b>The increasingly competitive nature of the domestic gas market in Russia and its implications for Gazprom and the Independents</b></p> <ul style="list-style-type: none"> <li>▪ The future for Russian gas exports – will Gazprom's monopoly remain or will Rosneft and Novatek become competitors in Asia and Europe?</li> <li>▪ The potential shape of the Russian gas sector in 2020 – will Gazprom still be the dominant player?</li> </ul> <p><i>James Henderson, Senior Research Fellow, Oxford Institute for Energy Studies</i></p>
11:45	<p><b>The emergence of the "gas independents": will this be a game changer for Russia?</b></p> <ul style="list-style-type: none"> <li>▪ Recent gas market dynamics in Russia: emergence of the "independents" and decline of Gazprom's output</li> <li>▪ The unique and privileged position that Independents enjoy and how this impacts on Europe's gas markets</li> <li>▪ How limited Gazprom's field of manoeuvre in Europe and why is this significant?</li> <li>▪ Independent gas producers are openly demanding the right to export, does it mean that the (unofficial) paradigm "what is good for Gazprom is good for Russia" is fading away?</li> </ul> <p><i>Dr. Danila Bochkarev, Senior Fellow, Energy, EastWest Institute</i></p>

12:10	<i>Networking Lunch</i>
<b>THE SOUTHERN CORRIDOR AND SHAH DENIZ</b>	
<i>Sessions moderated by John Roberts, Energy Security Specialist, Platts</i>	
13:30	<b>Security of supply</b> <i>John Roberts, Energy Security Specialist, Platts</i>
13:55	<b>Trans Adriatic Pipeline: connecting Caspian gas to European markets</b> <ul style="list-style-type: none"> <li>▪ Advantages of the pipeline route with the landfall in Italy</li> <li>▪ Supply possibilities for South Eastern Europe</li> <li>▪ Alignment with Shah Deniz production schedule</li> </ul> <i>Michael Hoffmann, External Affairs Director, Trans Adriatic Pipeline (TAP)</i>
14:20	<b>BP's perspective on the Southern Gas Corridor</b> <i>John Baldwin, Vice President, Southern Corridor, BP</i>
14:45	<b>Gas competition in SEE: IGB – a factor for growth</b> <i>Dimitrios Manolis, Director International Activities International Projects Monitoring, DEPA</i>
15:10	<i>Refreshment Break</i>
<b>GAS INFRASTRUCTURE IN EUROPE</b>	
15:40	<b>How does physical storage fit into a mature European gas market?</b> <i>Dr. Axel Wietfeld, Chairman of the Board, E.ON Foldgaz Storage</i>
16:05	<b>GRT Gaz – Outcomes from the Ten Year Network Development Plan (TYNDP)</b> <ul style="list-style-type: none"> <li>▪ What impact has the recent economic crisis had on the demand for new infrastructure?</li> <li>▪ Implications for investment plans</li> <li>▪ Future outlook</li> </ul> <i>Christophe Poillon, Senior President, GRT Gaz</i>
16:30	<b>Infrastructure development: the key to open the door to greater competition in Europe's gas trading markets</b> <ul style="list-style-type: none"> <li>▪ Will transparent, non-discriminatory and flexible access conditions increase competition?</li> <li>▪ Delivering integrated and combined infrastructure regulated services</li> <li>▪ Flexibility to facilitate competition</li> </ul> <i>Francisco de la flor Garcia, Director of Regulation, ENAGAS</i>
16:55	<b>LNG – way forward for diversification of energy supply - Lithuania's case study</b> <ul style="list-style-type: none"> <li>▪ Gas supply challenges in the Baltics</li> <li>▪ Introduction of the LNG terminal project in Lithuania</li> <li>▪ Commercial possibilities of LNG in the region</li> </ul> <i>Rokas Masiulis, CEO, Klaipedos Nafta</i>
17:20	<b>Infrastructure, market and regulatory developments in Poland and CEE</b> <ul style="list-style-type: none"> <li>▪ An overview of ongoing and planned projects</li> <li>▪ The creation of a regional market</li> <li>▪ EU initiatives and regulatory evolution</li> </ul> <i>Piotr Kuś, Director, Gas Transmission Operator GAZ-SYSTEM S.A.</i>
17:40	<i>End of day one and drinks reception</i>
<b>Day two Friday 20<sup>th</sup> September</b>	
08:45	<i>Registration and continental breakfast</i>
09:15	<i>Chairman's review of day one</i>

	<i>Bjorn Brochmann, Head of Gas Research &amp; Forecasts , Thomson Reuters</i>
09:25	<p><b>How might shale gas impact European gas markets?</b></p> <ul style="list-style-type: none"> <li>▪ Can Europe take advantage of its shale gas resources and, if so, what could the impacts be? Lower energy prices? Increased security of supply? Economic benefits? Reduced emissions?</li> <li>▪ What are the barriers that are preventing shale gas development in Europe?</li> </ul> <p><i>John Williams, Senior Principal, Pöyry Management Consulting</i></p>
09:50	<p><b>European Gas: Security, Diversity &amp; Volatility.</b></p> <ul style="list-style-type: none"> <li>▪ Changes in supply demand trend</li> <li>▪ Price &amp; volatility</li> <li>▪ Challenges going ahead</li> </ul> <p><i>Dr. Ashna Rahman, Manager, Energy Analytics (Europe), Bentek Energy</i></p>
10:15	<i>Refreshment break</i>
<b>THE LEGAL AND REGULATORY ISSUES SURROUNDING THE EUROPEAN GAS MARKETS</b>	
10:45	<p><b>Discussion moderated by John Roberts, Energy Security Specialist, Platts</b></p> <p><b>European Union law: is it creating greater uncertainty?</b></p> <ul style="list-style-type: none"> <li>▪ The EU dispute with Gazprom</li> <li>▪ The consequence of Gazprom’s dispute on Gazprom backed pipeline projects</li> <li>▪ The broader impact of the dispute</li> <li>▪ Will new legislation affect infrastructure investment?</li> <li>▪ The Europeanisation of energy policy – what does it mean for energy companies?</li> <li>▪ Does the EU have an internally consistent energy policy?</li> </ul> <p><i>Ana Stanic, Solicitor Advocate and Founder, E&amp;A Law and Honorary Lecturer, CEPML, University of Dundee</i></p> <p><i>Dr. Jonas Grätz, Researcher, Global Security Team Center for Security Studies (CSS), ETH Zurich</i></p>
11:25	<p><b>Changing regulatory framework for gas transit and gas trading in CEE</b></p> <p><i>Kamil Blazek, Partner, Kinstellar</i></p> <p><i>Kristof Ferenczi, Partner, Kinstellar</i></p>
11:50	<p><b>Russian gas: challenges ahead on the domestic front?</b></p> <p><i>Dr. Vladimir Drebenstov Head of Russia &amp; CIS Economics, BP, Vice President for Communications and External Affairs, BP Russia and Head of Representative Office in Russia, BP Trading</i></p>
12:15	<p><b>A new European Regulation: the Network Code CAM and its effects on future European transport capacity trading</b></p> <p><i>Dr. Gotz Lincke, Managing Director, PRISMA European Capacity Platform GmbH</i></p>
12:40	<i>Closing remarks from the chairman and end of the conference</i>