

Gas Industry CEE

Legislation – CEE Trade – Resources of the future

15th June 2011

Hotel Diplomat, Prague, Czech Republic

- EU Energy Legislation and Proposed Changes
- 3rd Energy Package
- European versus Global Gas Markets
- Gas trading and Gas Pricing
- Gas Pipeline Infrastructure – Trans Adriatic Pipeline, Nabucco, Nord Stream, South Stream
- Gas Storages
- Resources of the Future

Speakers:

Andrea Ćirlićová

ENTSO – European Network of Transmission System Operators for Gas, Brussels, Belgium

Willem Coppoolse

GDF Suez, France

Agnieszka Dudzinska

European Energy Exchange AG, Leipzig, Germany

Eva Hoos

European Commission, Brussels, Belgium

Mariusz Hubski

European Commission, Brussels, Belgium

Ing. Pavel Kopecký

RWE Gas Storage, s.r.o., Prague, Czech Republic

Gundolf Schweppe

E.ON Gas Storage GmbH, Essen, Germany

Dr. Gerhard Siegl

OMV Gas, GmbH, Vienna, Austria

Laszló Varró

MOL Plc., Budapest, Hungary

Katja Yafimava D. Phil.

Oxford Institute for Energy Studies, Oxford, UK

Trans Adriatic Pipeline representative

Who should attend the conference

- Members of the Boards and Vice Presidents of European Energy Companies
- Directors of Oil and Gas Operating Companies
- Other Representatives of Oil and Gas Operating Companies
- Heads of Strategy and Legislative Departments
- Business Directors
- Representatives of European Regulators
- Traders
- Members of Energy Associations
- Technology and Solutions Providers
- Researchers
- Analytics and Consultants

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Prague, March 2011

Dear Sir and Madame,

the current situation on the gas markets within the region of Central and Eastern Europe is influenced by the European integration process, with regard to which it is possible to mention the terms as **unbundling, market coupling** or **capacity allocation**. Considering this process, debates also focus on the development of **gas pipelines projects** – e.g. **Nabucco, South Stream** or **Nord Stream**, which could ensure the stability and security of energy supplies.

Institute for International Research would like to invite you to the conference **“GAS INDUSTRY CEE”**, which will take place on **15th June 2011** in the hotel Diplomat, Prague. The conference will provide you with knowledge, complex information and in-depth analysis of current issues of gas industry.

The conference is focused on the **3rd energy package** and **other EU steps** toward successful energy savings. Along with the agenda of the conference, you will be provided with information about **gas trading** and the **role of energy exchanges**, as well as gas reserves and the **potential of gas storages**. This event also provides the possibility for its participants to exchange ideas and will stimulate **debate** about the important issues, such as debate about the resources of the future – **LNG** or **shale gas**.

Meet the main actors of the European energy business. Come and get the essential information about the gas business and future development!

I am looking forward to meeting you!

With best regards,



Mgr. Klára Medunová
Conference Producer
Institute for International Research



P.S.: 2011 – the year of progress in integration process – BE PREPARED!

From 8.30 am

Welcome and distribution of conference materials

9.00 am

Welcome speech by the Institute for International Research and its Chairman

EU Energy legislation

9.10 am

3rd Energy Package

- New measures, standards and rules
- Unbundling – new obligations for gas companies
- Entry-Exit-Model
- Strengthening of consumer protection
- New security standards
- Implications for gas markets within the region of CEE

Dr. Gerhard Siegl, Head of Domestic Transportation, OMV Gas, GmbH, Vienna, Austria

9.50 am

European Instruments of Support to Energy Infrastructure

- Current Priorities of the European Energy Policy
- Current Instruments of Support to Gas Infrastructure – TEN-E Guidelines
- Future European Policy of Infrastructure Support – Energy Infrastructure Package
- New Gas Supply Corridor in Europe – North-South Interconnections in the CEE

Mariusz Hubski, Policy Officer, DG Energy – Unit B1, Energy Policy, Security of Supply & Network, European Commission, Brussels, Belgium

10.30 am Coffee break

10.45 am

EU steps toward successful energy savings

- “Energy 2020: strategy for pro-competition, sustainable and safe energy” and Energy Efficiency Plan 2020
- What steps will have to be taken to keep to the criteria and objectives contained in “Energy 2020”?
- 202020 – What is still required to achieve energy efficiency and renewable energy targets?
- 2050 Roadmap – long terms perspectives and strategies

Eva Hoos, Policy Officer, DG Energy – Unit C3, Energy Efficiency, European Commission, Brussels, Belgium

11.15 am

Comparison of the European and the Global Gas Markets

- The future trends of European Gas Market in the face of shifting dynamics of Global Gas Markets – Consequences of shifting dynamics of Global Gas Markets and their impacts
- Pre-crisis demand versus actual demand – regarding actual recovery, are pre-crisis demands coming back?
- Demand outlook – outcome of financial crisis

Speaker contacted

11.45 am

Latest development and trends in CEE Gas Market

- Current situation and measures being taken to improve CEE energy markets
- Obstacles and barriers for further development
- The strategy and plans of MOL Group as one of CEE Gas Market Leaders

Laszlo Varró, Vice President for Strategy Development of MOL Group, MOL Plc., Budapest, Hungary

12.30 pm Lunch

Gas trading and gas markets within the region of CEE

13.30 pm

Growing role of exchange gas trading in Germany

- The role of energy exchanges in the phase of market integration
- Agnieszka Dudzinska, Market Development Department, European Energy Exchange AG, Leipzig, Germany**

14.15 pm

CEE Gas Markets and the integration process

- Integration of European Energy Markets – how to make things work?
- Infrastructure investment as an integration tool

Andrea Ćirlićová, Senior Adviser, ENTSOG – European Network of Transmission System Operators for Gas, Brussels, Belgium

15.00 pm Coffee break

15.20 pm

Gas pipeline projects in Central and Eastern Europe

- Trans Adriatic Pipeline's role in the Southern Gas Corridor
- TAP's contribution to security of supply in the region
- Current status of the project and requirements for future progress

Trans Adriatic Pipeline representative

16.00 pm

Importance of gas infrastructure for European gas security

- Nabucco, Nord Stream, South Stream, etc.
- The actual situation and future plans
- Can the building of new infrastructure be the solution how to ensure the security of supply?

Katja Yafimava, D. Phil., Research Fellow, Natural Gas Research Programme, Oxford Institute for Energy Studies, Oxford, UK

16.30 pm

Gas Storages as new instruments for traders?

- Their potential and impact on the gas pricing
- Prognosis of future demands – an increase in their usability – off-seasonal utilization?
- Sufficiency of gas storages capacity

- Market development in Germany
- Potential for storage products in a new market environment

Ing. Pavel Kopecký, Senior Analyst, Storage Sales, RWE Gas Storage, s.r.o., Prague, Czech Republic
Gundolf Schweppe, Head of Marketing/Sales, E.ON Gas Storage GmbH, Essen, Germany

Resources of the Future

17.30 pm

Resources of the Future with an emphasis on the CEE region

- LNG as a one solution for diversification of sources
 - Global versus European demands
 - LNG – technical issues and implantation
 - variety of commercial issues
 - potential of LNG
- Shale gas as potential way how to become independent on Russia?
- Unconventional gas

Panel Discussion

Willem Coppoolse, Head of Capacity Development Transmission Storage and LNG, GDF Suez, France

18.00 pm Final words from the Chairman of the day

18.10 pm Conclusion of the conference, followed by cocktail party

COCKTAIL PARTY

At the end of the conference, IIR Company would like to invite you for a glass of wine. Take this opportunity to exchange opinions with colleagues in a pleasant and informal atmosphere.

Business Insights

The Eastern European Gas Market Outlook 2010

IIR Czech Republic has partnered with a world leading provider of premium global business information, Business Insights, to offer You the opportunity to purchase relevant and timely energy reports with a focus on Central and Eastern European countries.

'The Eastern European Gas Market Outlook 2010' report examines the role of gas within each of the major Eastern European utilities markets and analyses the differences that exist in terms of gas self sufficiency, and future growth of demand.

This report provides new and updated analysis of **12 Eastern European gas markets**, with detailed data on supply and demand balances. Each country profile features supply and demand overviews, an examination of key governmental, legal and political influences on the sector and an analysis of wholesale trading and the pipeline, LNG and storage infrastructure.

This report provides

- Profiles of each country's gas infrastructure including transit and distribution pipelines and their ownership, storage capacities
- An understanding of Eastern European gas regulation, including local legislation, competitive conditions and market reforms.
- Gas supply data in billion cubic metres as well as production, pipeline imports and exports by country and LNG imports.
- Gas demand data by consumer type divided into residential, non-residential and power generation in billion cubic metres.
- An overview of wholesale gas trading market in each country focussing on the market owners and operators, the active players, liquidity and future prospects.
- Gas demand forecasts for each country to 2020, in addition to market trends detailing gas production and demand by sector.

To find out more information about this presentation or the conference please call Zuzana Blahova on +420 222 074 501 or e-mail zuzana.blahova@conference.cz.

Conference title: **Gas Industry CEE**, Conference code: **C1110****PLEASE FILL IN THE REGISTRATION FORM**Yes, I will attend: Gas Industry CEE Also send me a copy of 'The Eastern European Gas Market Outlook 2010' study

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 I wish to receive information via emailYes, I will attend: Gas Industry CEE Also send me a copy of 'The Eastern European Gas Market Outlook 2010' study

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 Nature of company's business

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C1110HU

DATE AND VENUE DETAILS**Conference:** Gas Industry CEEWednesday 15th June 2011, 8.30 am – 18.10 pm, followed by cocktail**LOCATION:** Accomodation and parking is not included in the participation fee. For conference participants we offer the possibility to use a limited contingent of rooms at a special price in the hotel where the conference takes place. This contingent can be used for booking no later than four weeks before the conference. Please make reservations at the hotel and refer to your participation at the IIR conference:**Hotel Diplomat, Evropská 15, 160 41 Praha 6****tel.: +420 296 559 111, fax: +420 296 559 215****e-mail: info@diplomathotel.cz, www.diplomathotel.cz****CANCELLATION**

This application is binding. In the event that it is cancelled, we collect a cancellation fee of EUR 120. If cancellation is made later than 14 days prior to the commencement of the conference, the entire participation fee is payable. We regret that no refunds can be made after this date. Substitution of conferee is possible. Organizer of conference appropriates requirement for program change in exigent circumstances. Accommodation is not involved in the price. Program printed on 4. 3. 2011.

Take an advantage of our attractive discount possibilities!

‡ ‡ **10% price reduction for 2 delegates**

‡ ‡ ‡ **20% price reduction for 3 delegates**

‡ ‡ ‡ ‡ **30% price reduction for more than 4 delegates**

from the same company!**PARTICIPANT FEE**

The conference fee includes documentation, lunch, drinks and snacks and is set per person:

Registration and costs:**Gas Industry CEE****Book before 23. 5. 11**

790 €

Book after 24. 5. 11

830 €

Gas Industry CEE + 'The Eastern European Gas Market Outlook 2010' study

1.630 €

The Eastern European Gas Market Outlook 2010 is a latest study published by Business Insights which examines the role of gas within each of the major Eastern European utilities markets and analyzes the differences that exist in terms of gas self sufficiency, and future growth of demand.

Within 14 days following our reception of your application, you will receive a written confirmation of your enrollment. As soon as you receive our invoice, please transfer the specified sum to the specified account in the Czech Republic. Please make sure that your bank transfer receipt under all circumstances includes the following information: variable symbol, participant's name and company, and the conference code C1110. Please make sure that the specified sum is paid before the commencement of the conference.

YOUR CONTACT TO US**Conference content:**

Mgr. Klára Medunová

klara.medunova@konference.cz

+420 222 074 503

Customer Relations:

Tunde Takacs

conference@iir-hungary.hu

+36-1-459-7300