

# GAS

## 2015



1 December 2015

► **THE EUROPEAN GAS MARKET – FACING THE CURRENT CHALLENGES IN EUROPE!**

Presentations planned from following countries:



► **Meet the decision makers of the European gas industry! A selection of the experts panel ...**



**Jayesh Parmar,**  
Baringa Partners



**Dr. Wolfgang Peters,**  
RWE Supply & Trading CZ



**Mirek Topolánek,**  
eustream



**Robert van Rede,**  
GasTerra



**Arne Westeng,**  
Bayerngas Norge



► **Don't miss the Conference on 2 and 3 December 2015**

**Change ahead for the gas market in Germany**

Decarbonization, climate change and security of supply –  
harbingers of a resurgence of natural gas, or of its demise?

(Conference Language: German)



TUESDAY, 1 DECEMBER 2015

# THE EUROPEAN GAS MARKET



Conference language: English

9.00 – 9.30 Welcome reception with tea and coffee

9.30 – 9.40

## Opening of the conference by EUROFORUM and the Chairman



Jayesh Parmar, Partner, Energy Advisory Services, Baringa Partners, London

## POLITICAL FRAMEWORK FOR THE EUROPEAN GAS MARKET

9.40 – 10.00

### KEYNOTE

## Revision of SoS-Regulation and the LNG- and Storage-Strategy – status quo and next steps



Stefan Moser, Head of Unit Security of Supply, DG Energy, European Commission, Brussels

10.00 – 10.20

## Incremental Capacity – a market based approach to allocate new capacity



- ▶ Amendment of the NC CAM - current status
- ▶ Implications for market players
- ▶ An instrument for network development



Yvonne Grösch, Head of Section Gas Transmission Network Access/International Gas Trading, Federal Network Agency, Bonn, and ACER CAM Task Force Co-Chair, Agency for the Cooperation of Energy Regulators, Ljubljana

10.20 – 10.40

## Path to an Energy Union – Regulatory framework and market integration



Ralph Bahke, Board Member, ENTSO-G European Network of Transmission System Operators for Gas, Brussels

10.40 – 11.00 Discussion

11.00 – 11.30 Networking coffee break

## PRICE INDICATORS, DRIVERS AND GLOBAL DEVELOPMENT

11.30 – 11.50

## The driving forces for Demand and Supply, price development and how UK will contribute to Security of Supply



to be confirmed

11.50 – 12.10

## The Decline in Oil Prices and its Implications for the Global and European Natural Gas Markets



- ▶ Are we headed towards Global Price Convergence between Asia, the U.S. and Europe?
- ▶ Has Europe, for U.S. Shale Gas Exporters, become an attractive Target or will it remain a Market of last Resort?
- ▶ Where do we stand on our way towards an "Eurasian Henry Hub" and what is its Relevance for Security of Supply?



Dr. Wolfgang Peters, Chairman of the Board of Directors, CEO, RWE Supply & Trading CZ, a.s. Prague, and Managing Director, The Gas Value Chain Company GmbH, Germany

12.10 – 12.30

## Liquidity Developments in the European gas hubs – where do we stand today?



- ▶ European regulatory harmonization as basis for sound development
- ▶ Emergence of new hubs and sustainability of existing hubs
- ▶ The pivotal role of gas spot trading markets
- ▶ Leading gas derivative markets in the European gas energy industry



Dr. Egbert Laege, Chief Executive Officer, Powernext SA, Paris



„Good overview/  
update Gas Industry“

Dr. Ton Floors,  
Vopak LNG Holding B.V.



## SUPPLY SITUATION IN EUROPE – UPCOMING CHALLENGES

12.30 – 12.50

### L-gas production developments in the Netherlands



- ▶ Developments in the Netherlands since August 2012 w.r.t. L-gas production
- ▶ Current ongoing studies and timing and way forward
- ▶ GasTerra's response to the change in L-gas production



**Robert van Rede**, Commercial Director, GasTerra B.V., Groningen

12.50 – 13.10

### Increasing importance of investing in E&P



- ▶ Norwegian potential and challenges



**Arne Westeng**, Managing Director, Bayerngas Norge, Oslo

13.10 – 13.30

Discussion

13.30 – 15.00

Business lunch

## DIFFERENT STRATEGIES IN EUROPE TO ENSURE SECURITY OF SUPPLY

15.00 – 15.20

### Spain's opportunity to become the LNG Gas Hub in Europe: Capacity situation, prices and distribution



- ▶ LNG Small scale experience Spain and France
- ▶ Setting Up LNG plant from scratch until final operations
- ▶ Lesson learned and next steps in Germany



**Jaume Macia**, LNG Promotion and Market Analyst, Gas Natural Fenosa, Barcelona

15.20 – 15.40

### Access to three gas sources: Plans for South-Eastern Europe to prevent a crisis



**Dr. Dirk Buschle**, Deputy Director, Energy Community, Vienna

15.40 – 16.10

Discussion

16.10 – 16.40

Networking coffee break

## DIVERSIFICATION – NEW ROUTES

16.40 – 17.25

### DISCUSSION

### European pipeline projects – perspectives for the time after 2019



**Mirek Topolánek**, International Development and Public Affairs, eustream, a.s., Bratislava



**Jürgen Fuhlrott**, Head of Corporate Strategy and Policy, Open Grid Europe GmbH, Essen



**Dr. Peter Drasdo**, CEO Germany, Managing Director, Fluxys TENP GmbH, Düsseldorf



**Luis Ignacio Parada**, Head of Regulatory Development, Enagas S.A., Madrid

## NEW BUSINESS OPPORTUNITIES

17.25 – 17.45

### Value Chain of Small Scale LNG and the business model for the Gas Industry



- ▶ Is it feasible to produce your own LNG
- ▶ How is the business plan for the partners
- ▶ How will the future market be



**Henrik Iversen**, Vice Director, HMN Gashandel A/S, Viborg, Denmark

17.45 – 18.05

### Enhancing competition: Swiss plans for a new gas market model, upcoming steps and details



- ▶ Swiss gas market: how does it work?
- ▶ Development of grid access
- ▶ Does Swiss approach correspond with EU rules?



**Andreas Bolliger**, CEO, Erdgas Ostschweiz AG, Zurich

18.05 – 18.15

Discussion

18.15 – 18.30

Chairman's summing up and end of the first day followed by a drinks reception





CONFERENCE: WEDNESDAY & THURSDAY, 2 AND 3 DECEMBER 2015

# THE GERMAN GAS MARKET

Decarbonization, climate change and security of supply – harbingers of a resurgence of natural gas, or of its demise?



Conference language: German

## Main topics of this conference:

- ▶ The **geopolitical context**: consequences of political conflicts and of economic growth on demand & supply and gas prices
- ▶ **Security of supply** in Germany – political framework
- ▶ Increasing convergence of gas and electricity markets: how **renewables** are effecting the gas market
- ▶ The impact of the “Energiewende” – is a **new business model** necessary for the gas industry?
- ▶ Preparing the **gas grid** for the future: which regulatory adjustments are necessary?
- ▶ Converting **L-gas to H-gas**: overcoming practical challenges
- ▶ **Small Scale LNG**: capturing the opportunities in industry and transport sector
- ▶ Climate change: the role of gas in the **heating market**, for **power generation** and in the **mobility sector**
- ▶ Developing new business cases and **new products** – new sales opportunities!

## Speakers already confirmed:



Ulf Altmann,  
NBB Netzgesellschaft  
Berlin-Brandenburg



Ralph Bahke,  
FNB



Torsten Frank,  
NetConnect Germany



Katja Giesecking,  
GASAG Berliner Gaswerke



Klemens Gutmann,  
regiocom



Dr. Harald Hecking,  
ewi Energy Research  
and Scenarios



Oliver F. Hill,  
VNG – Verbundnetz Gas



Dr. Gerhard Holtmeier,  
Thüga



Dr. Timm Kehler,  
Zukunft ERDGAS



Kersten Kerl,  
Stadtwerke Langenfeld



Marcel Keiffenheim,  
Greenpeace Energy



Dr. Peter Klingenberg,  
E.ON Gas Storage



Jozua Knol,  
Total Energie Gas



Helmut Kusterer,  
GVS Gasversorgung  
Süddeutschland



Friedrich Lesche,  
Iveco Magirus



Prof. Dr. Gerald Linke,  
DVGW



Heiko Lohmann



Richard Mastenbroek,  
TIGAS-Erdgas Tirol



Jörn Peter Maurer,  
Stadtwerke Schneverdingen-  
Neuenkirchen



Dr. Ludwig Möhring,  
WINGAS



Maik Neubauer,  
First Utility/  
Shell PrivatEnergie



Prof. Dr. Bert Oschatz,  
ITG Institute for Building  
Systems Engineering Dresden



Prof. Dr. Friedbert Pflüger,  
King's College London



Stefan Rolle,  
Federal Ministry for Economic  
Affairs and Energy



Franzjosef Schafhausen,  
Federal Ministry for the  
Environment



Dag-Arnulf Schlaf,  
Volkswagen Nutzfahrzeuge



Wolfgang Schmidt,  
Bundesnetzagentur



Hilko Schomerus,  
Macquarie Infrastructure  
& Real Assets



Jens Schumann,  
Gasunie Deutschland



Andreas Schwenzer,  
Baring Partners



Jette Sontow,  
Stadtwerke Hannover



Dr. Gerrit Volk,  
Bundesnetzagentur



Dr. Christoph  
von dem Bussche,  
GASCADE Gastransport



Alfred Würzinger,  
Energie- und  
Wasserversorgung Bünde

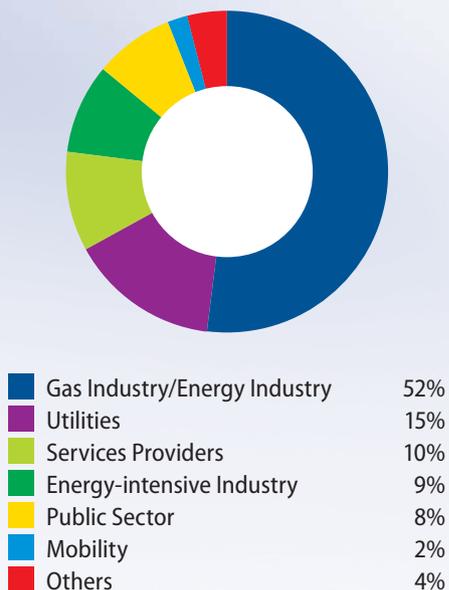


## Who you will meet at this year's annual conference

Board members, senior executives, director-level executives and managers working in:

- ▶ Corporate development and strategy
  - ▶ Energy policy
  - ▶ Regulation/legislation
  - ▶ Gas grids and gas transport
  - ▶ Balancing
  - ▶ Sales and marketing/key accounts
  - ▶ Gas supply
  - ▶ Gas trading and origination
  - ▶ Portfolio management
  - ▶ Risk management
  - ▶ Auditing/finance/investments
  - ▶ Communications/public relations
- at
- ▶ Gas supply companies
  - ▶ Grid companies
  - ▶ Gas trading companies
  - ▶ Energy-intensive industries
  - ▶ Banks and investors
  - ▶ Energy-industry organizations and associations along with legal advisors and consultants specializing in the energy supply industry

Last year's delegates by sectors:



## Networking opportunities

We understand how important networking is to our delegates. See below for a taster of the events we have planned to ensure you get to meet with the people you need to!

- ▶ **Welcome Drinks Reception** – a perfect opportunity to network in a relaxed environment and discuss the hot topics raised throughout the day.
- ▶ **Networking Breaks:** several networking breaks across the day will enable you to ensure you have the time to meet with all the people you need to in the European Gas Market.
- ▶ **Speed Networking Session** – the fastest way to meet potential business contacts.



## Christmas Shopping in Berlin

Extend your stay in Berlin and take advantage to explore the German capital. Enjoy the traditional pre-Christmas atmosphere, visit the historic sights and do some shopping in one of Berlin's famous warehouses. Berlin has a lot to offer – we will be happy to help you plan your stay!





## PARTNER

**Zukunft ERDGAS e.V.**  
Gemeinsam. Für nachhaltige Energie.

**Zukunft ERDGAS e.V.** bundles the efforts of the German natural gas industry and communicates to the public and opinion-makers the opportunities that natural gas offers in terms of the energy turnaround and the energy mix of the future. The organisation is backed by leading players in the natural gas industry such as importers, regional suppliers and municipal utilities. The heating equipment industry, skilled trades and associations support Zukunft ERDGAS as partners.

**Zukunft ERDGAS e.V.**  
Neustädtische Kirchstraße 8  
10117 Berlin  
[www.zukunft-erdgas.info](http://www.zukunft-erdgas.info)

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**regiocom GmbH** is an IT and BPO services provider focussing on energy market processes. Regiocom's services include EDIFACT market data exchange, customer switching processes, metering data exchange, remote metering/smart metering, mass billing and accounting, customer care and claims management. In doing so regiocom has recourse to over 15 years of industry experience. Regiocom's strengths lie in services with its home-grown software solutions, including rcRegMan (regulator data management), rcGreenE (billing/balancing small renewable power generators), rcKAM (managing concession fees) and rcUTIL (EDIFACT middleware and mass processing platform). Regiocom is a certified SAP BPO partner providing full service for energy products and networks.

**regiocom GmbH**  
Marienstraße 1  
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[www.regiocom.com](http://www.regiocom.com)

## EXHIBITORS

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CONCEPTS FOR WORKSPACE AND TECHNOLOGY

**Conwotec** is an independent advisor for high- technology environments for commodity traders. Using the knowledge of our international network of architects, IT solution specialists, furniture and facility experts, we have more than 60 years of experience with professional delivery of solutions available.

**Conwotec S.A.**  
681 rue de Neudorf  
L-2220 Luxembourg  
[www.conwotec.com](http://www.conwotec.com)

**GVS** GasVersorgung  
Süddeutschland  
Ihre Energie. Unsere Leidenschaft.

**Gasversorgung Süddeutschland (GVS) Stuttgart**, is one of the largest natural gas companies in Germany. In 2014 the company sold 57.8 billion kWh of natural gas, the sales turnover was € 1.4 billion. Since 1961, GVS has been a partner of municipal utilities and industry in Germany and abroad. In addition to the distribution and trading of natural gas and bio methane, the company offers diverse natural gas products and services, such as portfolio and balancing group management, contract accompanying services and many others.

**Gasversorgung Süddeutschland GmbH**  
Schulze-Delitzsch-Str. 7  
70565 Stuttgart  
[www.gvs-erdgas.de](http://www.gvs-erdgas.de)

**PEGAS**

**PEGAS** is the central gas trading platform of EEX Group operated by Powernext, providing its members with access to all products on one single platform and allowing them to trade in the Belgian, Dutch, French, German, Italian and UK market areas. The product range covers spot and derivatives contracts, and location spread products between the major European gas hubs.

**Powernext SA**  
5 boulevard Montmartre  
75002 Paris  
[www.pegas-trading.com](http://www.pegas-trading.com)

**Verbundnetz Gas AG**

**VNG – Verbundnetz Gas Aktiengesellschaft (VNG AG)** is a natural gas merchant company and energy service provider with headquarters in Leipzig. VNG AG is a company within the VNG Group that is active throughout the value chain of the German and European natural gas industry and focuses on the four key business areas of Exploration & Production, Gas Trading & Service, Gas Transport, and Gas Storage.

**VNG – Verbundnetz Gas AG**  
Braunstr. 7  
04347 Leipzig  
[www.vng.de](http://www.vng.de)

## COMPANY PRESENTATION

**Baringa**

**Baringa Partners LLP** is an award-winning management consultancy specialising in: energy; financial services; telecoms and media. We partner with organisations, developing and delivering key elements of their business strategy, and work with government and regulators providing policy and advisory services. Baringa works with our clients to implement new or optimise existing business capabilities relating to people, processes and technology.

**Baringa Partners**  
Königsallee 92a/4th floor  
40212 Düsseldorf  
[www.baringa.com](http://www.baringa.com)

**BEMD**  
Bundesverband der Energiemarktdienstleister

**Bundesverband der Energiemarktdienstleister BEMD e.V.**  
(federal association of energy service companies)

Whether it concerns quality standards, processes or legally regulated obligations, the BEMD represents the interests of service providers in the energy market so that they can achieve joint successes with energy companies. The association currently represents about 30 member companies active in the fields of billing and meter management, customer service and IT: both subsidiaries from energy companies as well as non-captive service providers.

**Bundesverband der Energiemarktdienstleister BEMD e.V.**  
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**EID** Energie Informationsdienst

[www.eid-aktuell.de](http://www.eid-aktuell.de)

**DVGW energie|wasser-praxis**

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**enerope**

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**gwf** Gas Erdgas

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Magazine for Smart Gas Technologies, Infrastructure and Utilization

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In the conference hotel, there is a limited allocation of rooms available at a reduced price. Please arrange the room reservation directly with the hotel quoting the reference "Euroforum event".

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