



Second IEF – IGU Ministerial Gas Forum

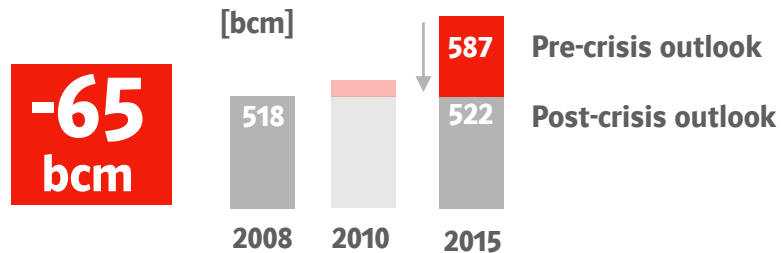
**Natural gas in Europe –
opportunities in a sustainable energy mix**

Hans-Peter Floren
Member of the Board of Management of E.ON Ruhrgas AG

Doha, November 30th 2010

The European gas market has changed substantially – oversupply is going to last longer than initially expected

Demand outlook

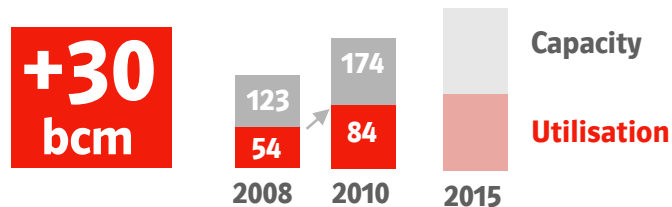


Liberalised market

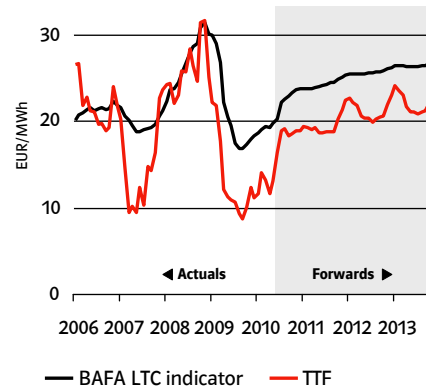


- EU and national legislation
- Unbundling, TPA
- Capacity allocation and congestion management rules

LNG supplies



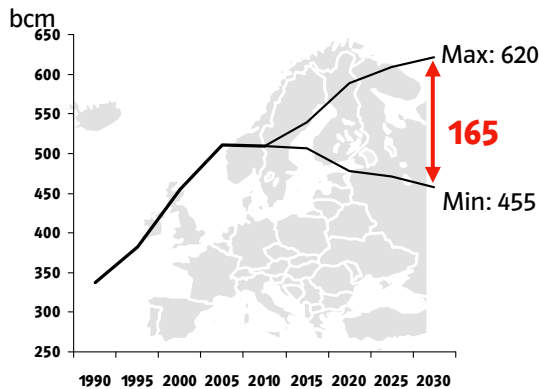
Gas price development



- Increased liquidity
- Sustainable decoupling of oil/gas prices
- Hubs sending price signals

Decarbonisation of European industry: natural gas has the potential to secure climate-friendly energy supplies

EU gas demand expectations in green scenarios



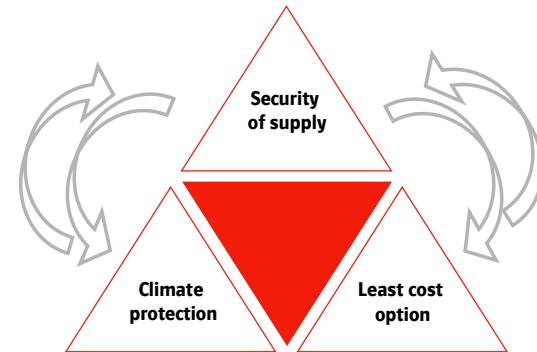
Political targets

- Decarbonisation of economy
- Increasing political influence in all markets to achieve 80% reduction target until 2050

Consequences

- Uncertainty of gas demand development
- Enforced technological competition between primary energies

Sustainable energy system requirements



Industry's response

- Positioning of natural gas as a green future energy
- Integration of natural gas in energy system
- Adaptation of LTCs to new market environment
- Secure long-term gas supplies

E.ON is a committed partner for new gas infrastructure and proven innovation leader with successful gas marketing activities

LNG as third pillar of gas supply of E.ON

Upstream



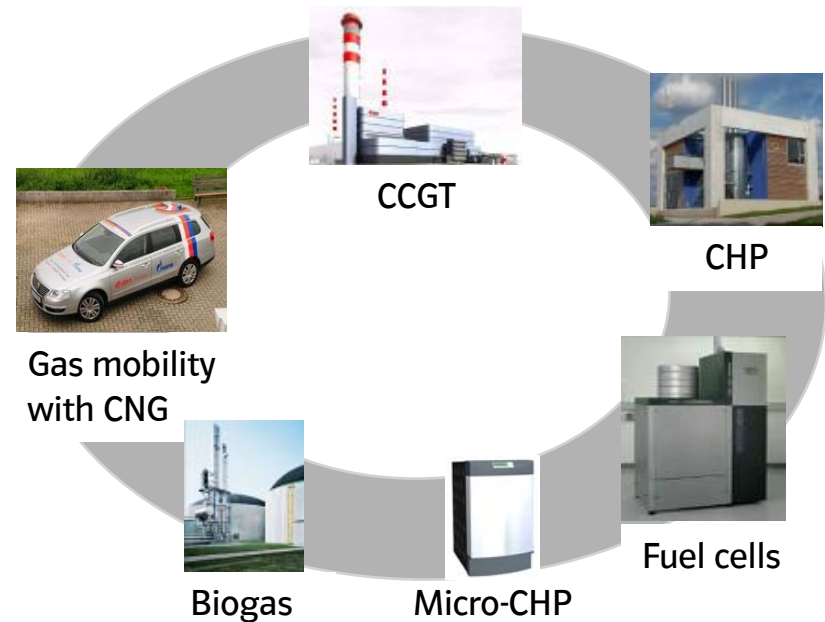
Midstream (LTCs)



LNG



Effective market development



Permanent dialogue required to master the challenges in coming years



The European gas market has changed substantially

Gas is a green energy for the future

E.ON Ruhrgas is committed to make the case for gas



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