



25th world gas conference
"Gas: Sustaining Future Global Growth"

Expert Forum 7 A

Regulatory Issues & Business Cases

Forum Chair: Ram Ramanathan
Saudi Aramco
Co-chair: Dominique Jamme, CRE France

6 June 2012
25th World Gas Conference
Kuala Lumpur

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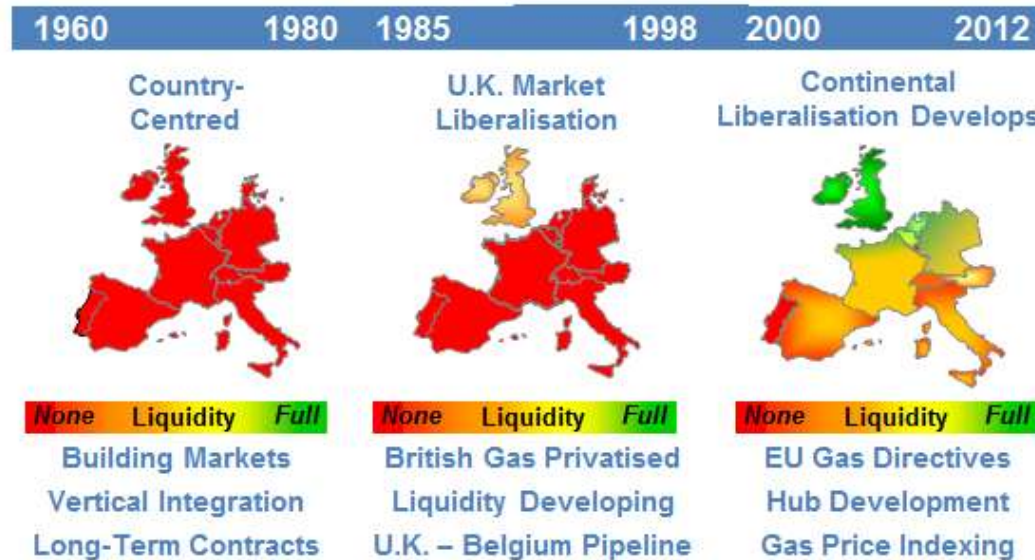
- Five presentations with perspectives from
 - Global / EU
 - Germany/France
 - Spain
 - Turkey
 - Argentina



European Gas Market Development

ExxonMobil: Andy Hubbard

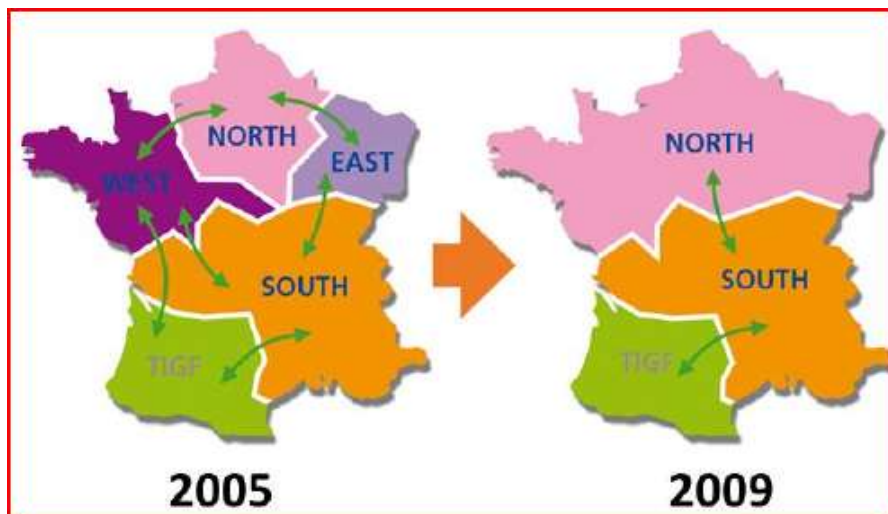
- History of market liberalization and development of a competitive market, greater liquidity, new and diverse supplies
- How regulations can facilitate sustainable supply growth
- Outlook and challenges for continued progress



Size of Market zones in European regulatory context

GRTgaz: Christophe Poillion

- Size of market areas a critical issue for well-functioning of market
- EU aspirations for bigger zones
- Framework proposed for zone merger studies



Assessing regulatory risk, Benchmarking regulatory framework

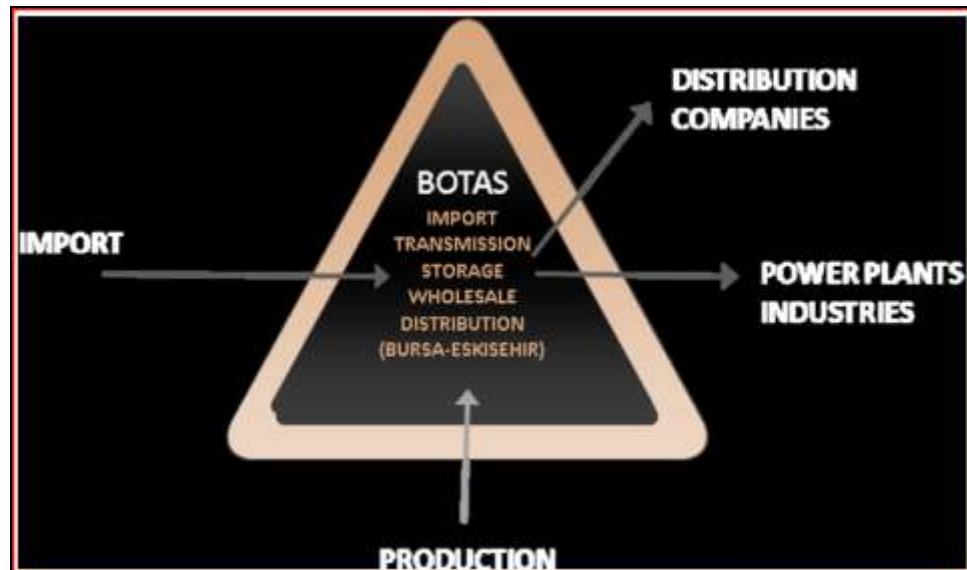
Enagas: Luis Parada and Silvia Serrano

- Significant differences in gas regulations & policies across the world
- Methodology proposed to evaluate and rate gas regulations
- Regulatory quality & efficiency index



Istanbul Gas Distribution Company: S. Murad S. Seralioglu

- Significant growth in gas demand and imports
- 2002 Natural Gas Market Law and EMRA the regulatory authority
- Market liberalization process and issues



Argentina's Gas Regulations & Prospects for Unconventional Gas Development

Apache Corp.: Mariano Ruiz

Pan American Energy: Emilio Nadra

- Argentina's gas supply, demand trends and impact of regulated pricing
- 2008 "Gas Plus" program to encourage gas E&P, esp. unconventional gas
- Recent developments in UG exploration, challenges and opportunities.





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Thank you

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