

# 26<sup>th</sup> World Gas Conference

1 – 5 June 2015, Paris, France



PGCB SG3 Business Cases

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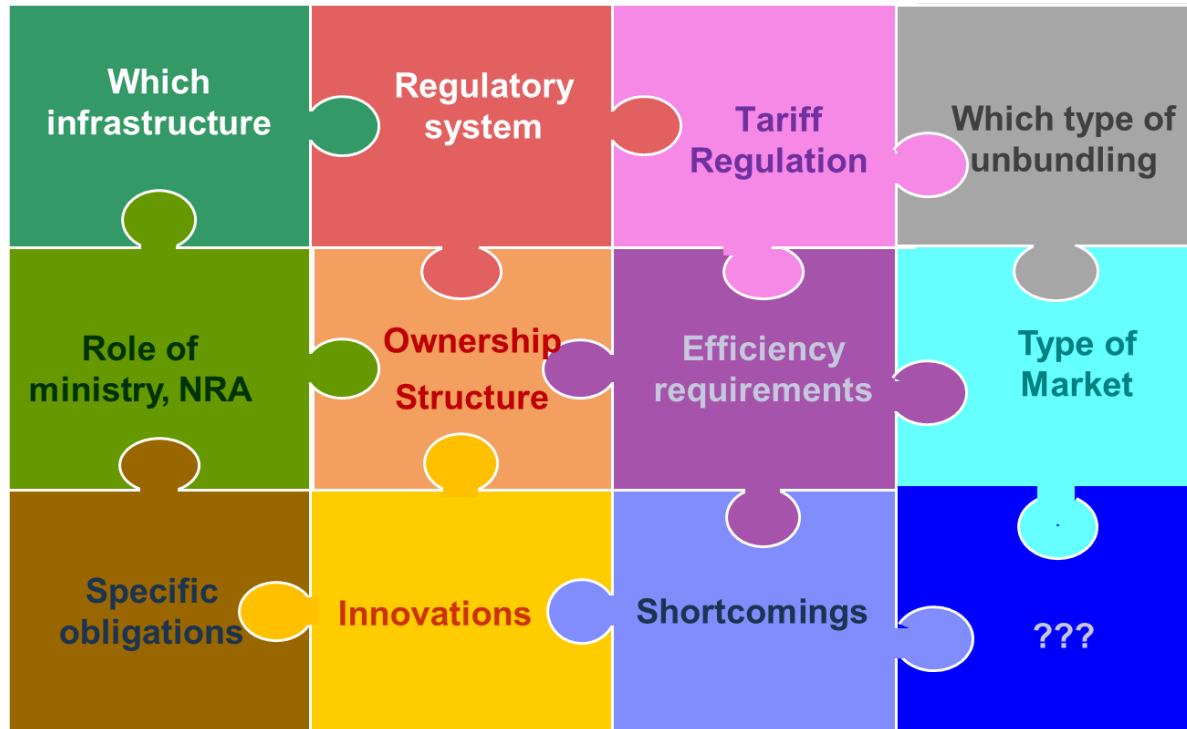
## The 2012-2015 job in a nutshell:

“to explore the relation between company's strategy and regulation”

“to build on top of work done”

“to obtain and analyse quantifiable data”

# About the scope of the survey



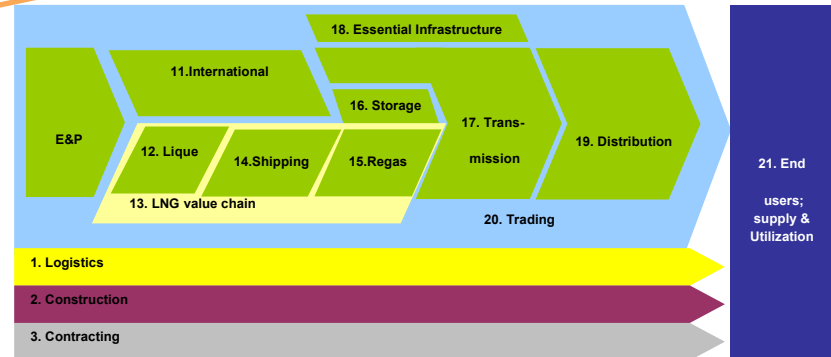
Survey aimed to understand the characteristics. It was not an easy task! From “what is it” to “where is it going”.

# Our results from the internetsurvey

Value chain element	#	%
10: Exploration and Production	1	2%
11: International transmission	3	6%
13: Liquefaction	3	6%
15: Regasification	2	4%
16: Storage	7	15%
17: Transmission	15	31%
19: Distribution	10	21%
20: Trading	5	10%
21: End users	2	4%
<b>Total</b>	<b>48</b>	<b>100%</b>

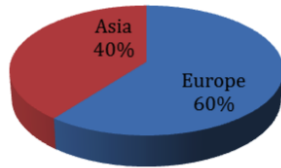
Good response

Statements are only statistical valid (with limitations) on Transmission and Distribution



# Some results

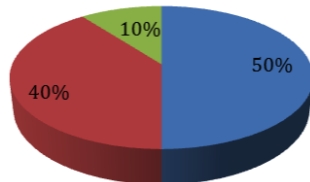
## Geographical representation



Only Europe and Asia!  
Asia Pacific, America, Africa are missing

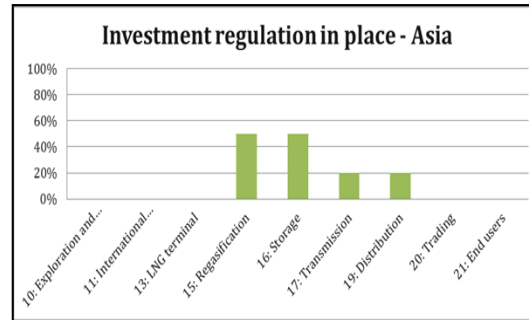
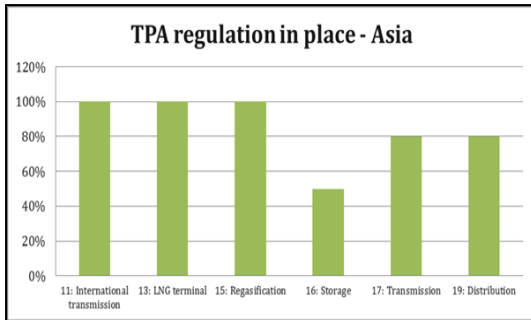
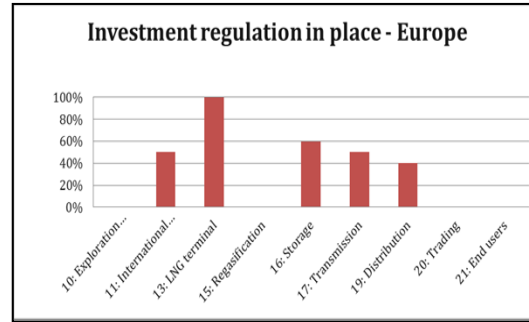
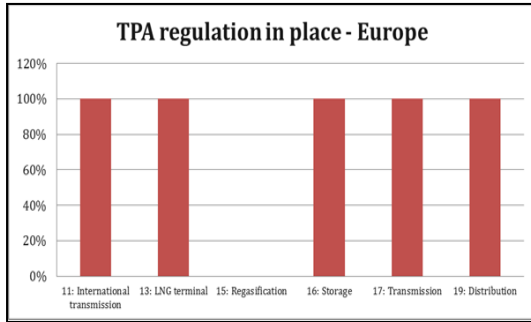
## Ownership of the companies

Publicly owned Private Mixed



Still interesting results!

# Some interesting indicators



Indicators for interesting differences available.

Further study required!

## Next steps

- Enough clues to continue to investigate the relation between strategy and regulation.
- Limited response on both the global coverage as well as coverage of the value chain needs rethinking of the approach and scope.
- The search for a common denominator requires understanding both the instruments as the goal of regulation.



## Next steps

Thank you for your kind attention