

26th World Gas Conference

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PGCB SG3 Business Cases

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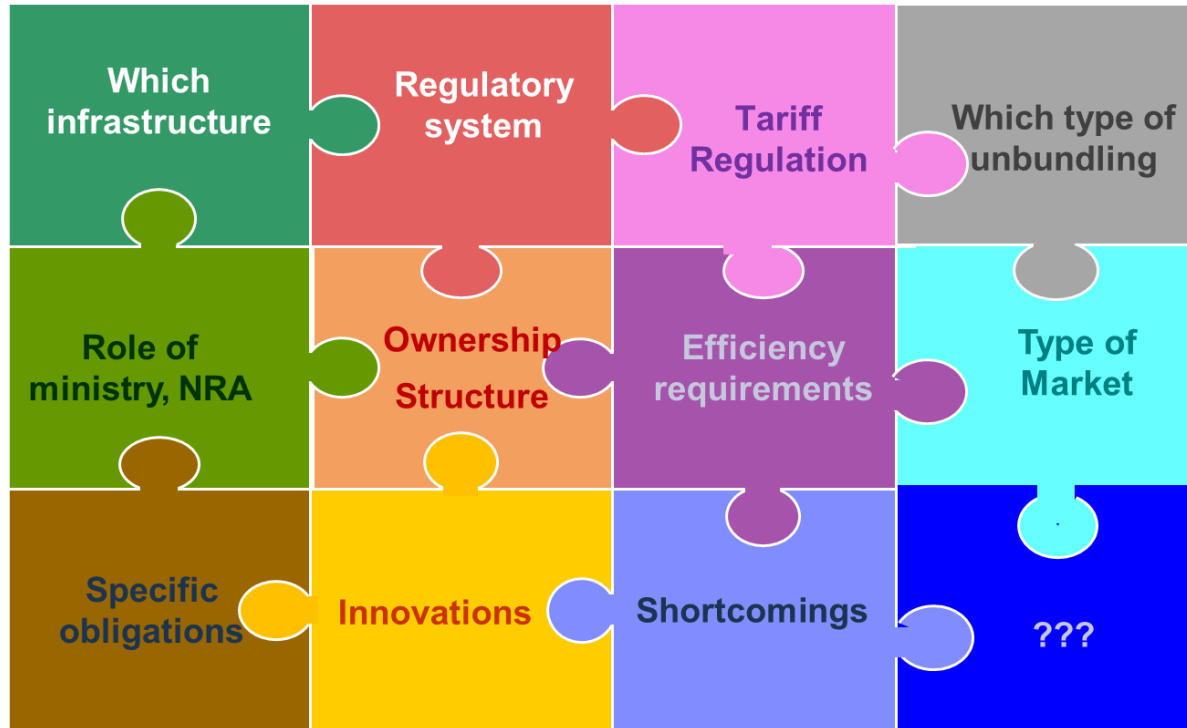
The 2012-2015 job in a nutshell:

“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



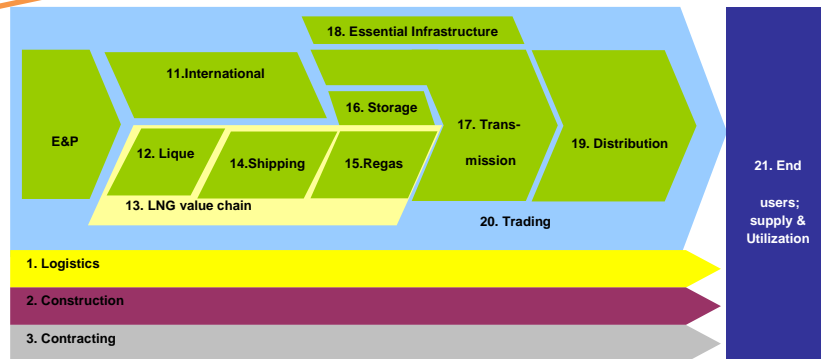
Survey aimed to understand the characteristics. It was not an easy task! From “what is it” to “where is it going”.

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%
Total	48	100%

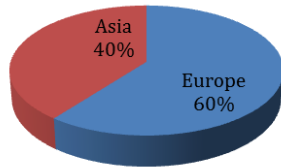
Good response

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



Some results

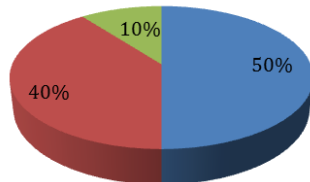
Geographical representation



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

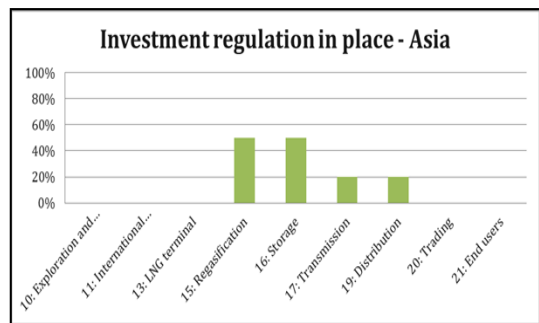
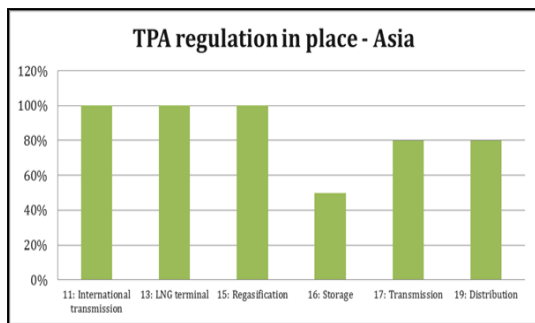
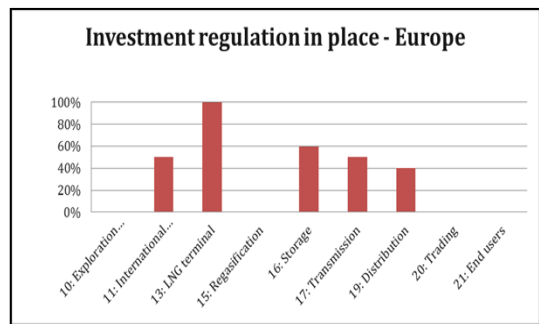
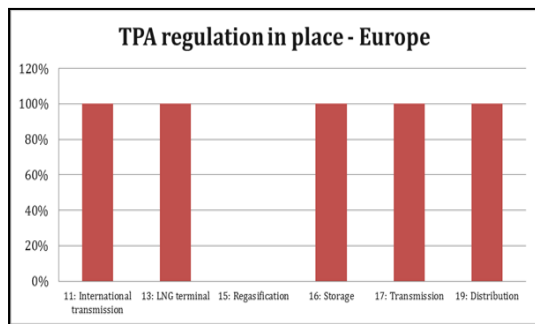
Ownership of the companies

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