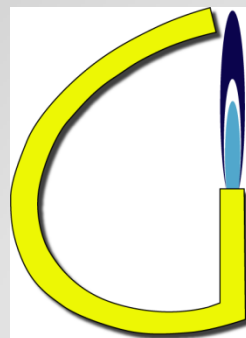




5TH CENTRAL EUROPEAN GAS CONGRESS



EuRoPol GAZ s.a.



Izba
Gospodarcza
Gazownictwa



5TH CENTRAL EUROPEAN GAS CONGRESS



Mr. Andrzej Sikora
Energy Studies Institute,
CEO



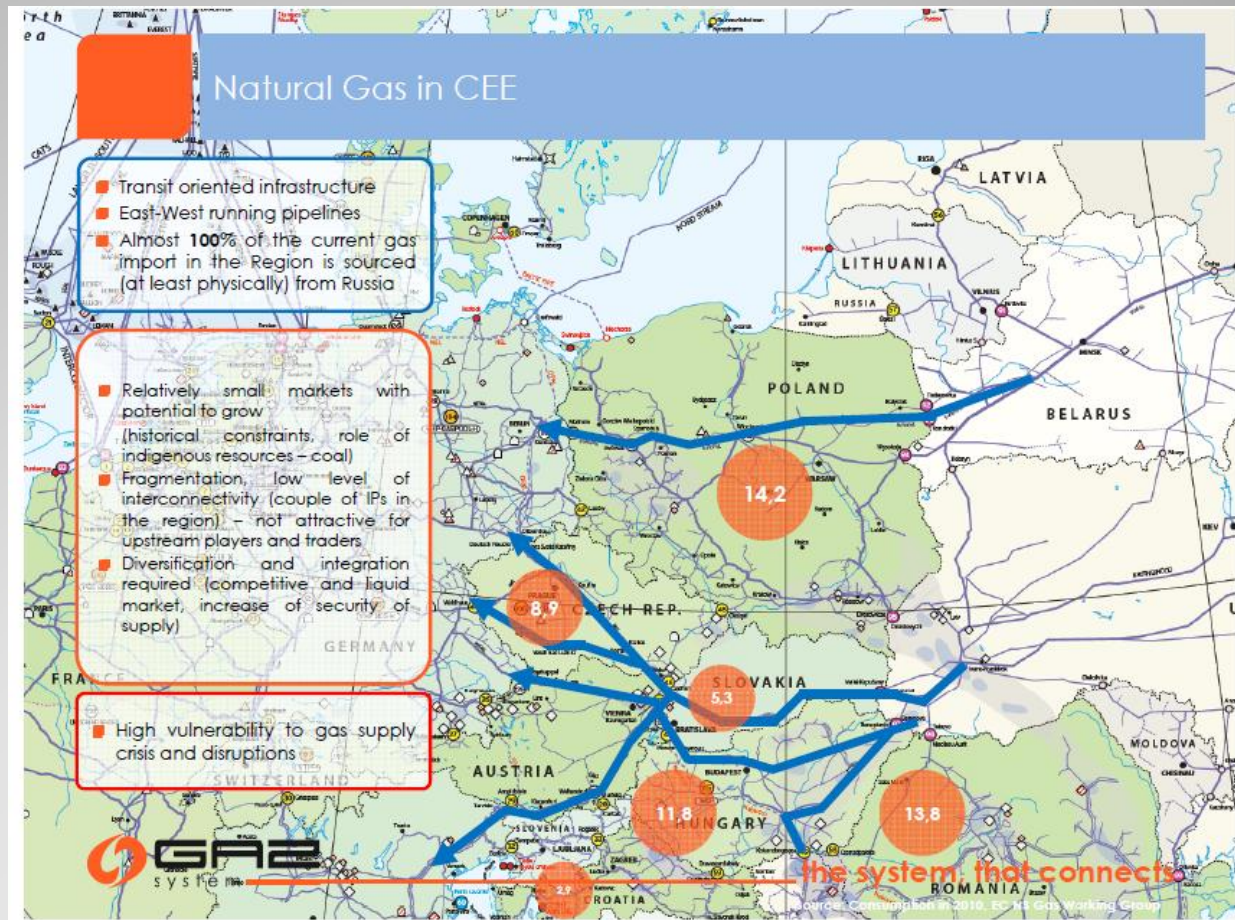
Mr. Mirosław Dobrut
President of the Chamber of the
Natural Gas Industry
&
EuRoPol GAZ S.A. CEO

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„Natural gas is a clean, affordable, reliable, efficient and secure energy source. It has a vital role to play in a sustainable energy future.[...]”

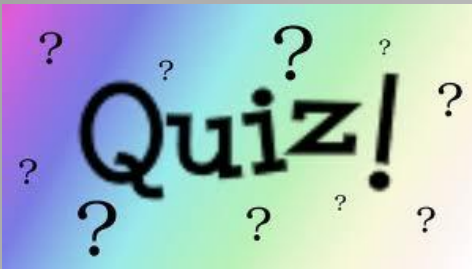
Budapest 2011

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1. Looking for our partners from Hungary in spite of the fact that there are politics, we are mainly engineers believing in science – knowledge and we do not care about the color of methane molecule!
2. V4 members have got a clear vision for the European gas market. It should function in order to benefit individual consumers and industrial stakeholders. Gas market should be free and open.
3. Natural Gas in Europe should be traded on a few, consolidated, liquid hubs with an independent access of the stakeholders. (Where is the place – the hub – for V4?)
4. Prices should be based on supply and demand, decoupled from other resources such as crude oil. Natural gas should be trade as commodity!
5. The liquid market has to be supported by the necessary infrastructure (transport, storage, LNG terminals).
6. The wholesaler/stakeholder (consumer / end-user) has to be able to safeguard its competitiveness by choosing freely the best gas resource corresponding to its needs. Market has to be open for all sources with shale potential.
7. V4 members had identified a number of concrete measures adopted by the EU that would secure the competitiveness of European natural gas industry, ensure fair prices for consumers and improve the security of supply of natural gas on the European market.
8. We have got a dream - we are looking for free, independent, fair, open natural gas market by the end of 2014!



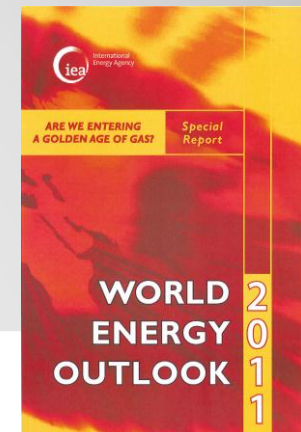
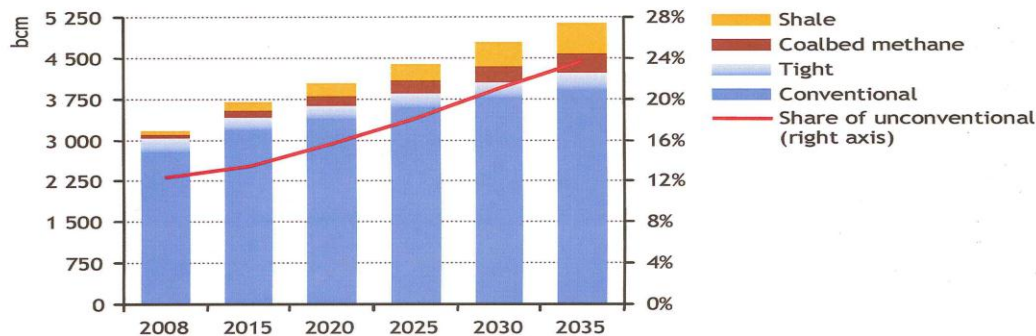
How big worldwide is yearly unconventional gas production today?

- ✓ 50 bcm
- ✓ 250 bcm
- ✓ 450 bcm
- ✓ 900 bcm

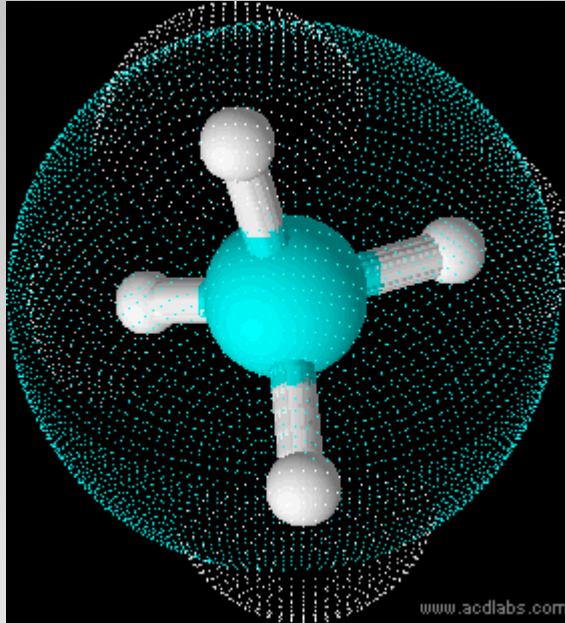


Source: Stanislaw Rychlicki PGNIG S.A..

Figure 1.7 ▷ Natural gas production by type in the GAS Scenario



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„Let the power and simplicity of natural gas rise the economy, open minds and will be the base for sustainable energy future.”

Prague 2012