INTRODUCTION

The oil and gas transportation sector of Central and Eastern Europe and the Balkans has witnessed continuing changes over the last twelve months, not only in its role as a transport passage of oil and gas, but also as a potential market for supply.

The plans of the regional governments to privatise and consolidate their state owned oil and gas operations, has become a reality for many companies and at the same time produced the opportunity for foreign international investors to become involved strategically within the sector, strengthening their position and thus liberalising the market.

With EU accession progressing on an individual country basis, how will this affect the Central and Eastern European and Balkan transportation sector as a whole? Additionally, to ensure the continuation of the security of supply, what governmental steps are planned for improvement and what are the expected legal changes?

The Oil and Gas Transit and Supply in Central and Eastern Europe and the Balkans distinguished panel of speakers will provide attendees with a knowledge and understanding of the regions markets, furthermore assisting and advancing international business partnerships.

WHO SHOULD ATTEND

- International Oil and Gas Companies
- Pipeline Equipment Manufacturers and Suppliers
- International Governments and Regulatory Bodies
- Banks, Fund Managers and Financial and Industrial Analysts
- Energy Traders
- Business Development Managers
- Legal and Specialist Advisors, Environmental and Management Consultants

OUR SPEAKER PANEL . . .

"Turkey is determined to benefit her very strategic geographical position to establish the energy bridge between the East and the West. I believe the conference organised by the Energy Exchange in Sofia will be of great importance to figure out the future of the gas transit corridors and markets in the area, with new players in the energy game".

Mr E Engur, *Deputy Head of Foreign Relations and Strategies Department,* BOTAS

"The emergence of the Caspian region as a 'world scale' producer of crude oil, underlines the importance of Black Sea States in determining economic export routes to the markets of western Europe and further afield.

Bulgaria, which will be central to many of the key transit route discussions and decisions will host this timely event, where significant key energy issues will be debated by a gathering of senior industry executives".

Mr T Ferguson, *President and CEO,* AMBO

The ENERGY EXCHANGE Ltd

OIL AND GAS TRANSIT AND SUPPLY IN CENTRAL AND EASTERN EUROPE AND THE BALKANS

Monday 25 November 2002 19:00 Pre Conference Welcome Reception

The ENERGY EXCHANGE Ltd

CONFERENCE PROGRAMME

Day One: Tuesday 26 November 2002

08:30 Registration and Coffee

09:00 OPENING WELCOME AND KEYNOTE ADDRESS

- Mr N Vassilev, *Deputy Prime Minister and Minister,* MINISTRY OF ECONOMY, Bulgaria

09:15 SESSION ONE
GOVERNMENTAL POLICIES FOR THE OIL AND GAS SECTOR IN CENTRAL AND EASTERN EUROPE AND THE BALKANS

- Mr N Yankov, *Deputy Minister,* MINISTRY OF ECONOMY, Bulgaria
- Ms E Hegedus, *Deputy State Secretary,* MINISTRY OF ECONOMIC AND TRANSPORT AFFAIRS, Hungary
- Ms K Udovicki, *Minister,* MINISTRY OF ENERGY AND MINING, Serbia
- Mr L Bondarenko, *Deputy Head of Fuel and Energy Complex,* MINISTRY OF ECONOMIC DEVELOPMENT AND TRADE, Russia
- Mr Z Cakan, *Minister,* MINISTRY OF ENERGY AND NATURAL RESOURCES, Turkey *
- Mr S Gavrish, *Member of the Fuel and Energy Committee,* PARLIAMENT, Ukraine

- What plans do regional governments have for the continued privatisation of oil and gas companies and pipeline operators?
- What strategic importance is now given to energy transit as an economic activity?
- Progress in EU accession talks on Energy Policy - a look at the new liberalised energy market in Bulgaria.
- Given the long-term political importance of securing import sources, what are the essential components of the security of supply and what steps are governments taking to build upon their future energy security?
- Intergovernmental cooperation in relation to secure transit of oil and gas. What steps have been taken to improve transparency in the conditions of access to pipelines?

10:40 Coffee break

11:10 SESSION TWO
TRENDS IN INTERNATIONAL OIL AND GAS SUPPLY AND TRANSIT THROUGHOUT THE REGION

- Senior Representative, GAZPROM
- Mr I Solyarsky, *Vice President,* TRANSNEFT
- Mr S Polovets, *Vice President, Strategic Alliances, Mergers and Acquisitions,* TNK INTERNATIONAL
- Mr V Fedotenko, *Head of Transport Infrastructure Development Department,* YUKOS OIL COMPANY

- What are the plans for Russian supply into Europe? A look at pipeline projects in response to a rising consumption and a liberalised market.
- Are oil and gas suppliers looking to further 'direct sales' rather than continue using a third party?
- Is it likely that the industry will see alliances formed in order to improve export economics throughout the region?
- Is there a possibility for further liberalisation in the region, allowing international suppliers to invest and import oil and gas to the region?

12:35 Lunch

14:00 SESSION THREE
THE DOMESTIC SUPPLY AND TRANSIT OF OIL AND GAS IN THE BALKANS AND SOUTH EASTERN EUROPE

Focus: Bulgaria, Romania, Greece, FYROM

- Mr G Al-Jebouri, *First Deputy Minister,* BULGARIAN MINISTRY OF FINANCE *and Chairman,* BULGARGAZ
- Mr T Ferguson, *President and Chief Executive Officer,* AMBO
- Mr G Coconea, *Director General,* TRANSGAZ
- Mr V Kunev, *Executive Director,* BALKAN AND BLACK SEA GAS AND PETROLEUM ASSOCIATION

- What are Bulgaria's plans for the development and liberalisation of its gas sector? What potential investors are there for such privatisation? What implications will this have on Bulgargas and transit and supply through the country?
- The current and future role of the Balkans in the transit and supply of crude oil
- Romania's role in the European natural gas transit sector: current status and perspectives.
- The expansion plans of Greece in the Balkan oil and gas sector. What opportunities are there for developments in the transportation routes to and through Greece and subsequently international investment into their oil companies?

15:00 Coffee break

15:30 SESSION THREE CONTINUED
THE DOMESTIC SUPPLY AND TRANSIT OF OIL AND GAS IN THE BALKANS AND SOUTH EASTERN EUROPE

Focus: Croatia, Serbia, Yugoslavia, Turkey

- Mrs V Trnokop-Tanta, *Chairman and Chief Executive,* JANAF
- Mr E Engur, *Deputy Head of Foreign Relations and Strategies Department,* BOTAS
- Mr V Djurovic, *Director of Transportation,* PLINARCO
- Ms B Sas, *Partner,* HARRISON SOLICITORS

- What are the plans of the Croatian oil and gas companies involved in the transportation of oil and gas? What impact will they have on the transportation of oil and gas in the country?
- The restructure and privatisation of the oil and gas industries of Serbia including the development plans of NIS and Beopetrol. What are the legal aspects of energy transit and supply in the Yugoslavia sector? What pace of reform is likely in the region? And how will such growth be financed and regulated?
- Natural gas in Croatia. A look at the regional role of Croatia in the supply and transit of natural gas including restructuring plans and new energy laws.
- A look at Turkey as an energy corridor between the East and the West.

17:00 SUMMARY OF THE SESSION PRESENTATIONS WITH THE OPPORTUNITY FOR OPEN FLOOR DISCUSSIONS

Chairman, Moderator:
Mr J Roberts, *Senior Editor,* PLATTS ENERGY GROUP

17:30 End of Day One

19:00 Evening Cocktail Reception

Day Two: Wednesday 27 November 2002

08:30 Registration and Coffee

09:00 SESSION FOUR
CENTRAL AND EASTERN EUROPEAN REGIONAL STRATEGIES FOR OIL AND GAS TRANSIT AND SUPPLY

Focus: Hungary, Czech Republic, Austria, Slovakia

- Dr J Toth, *Director of Supply and Trading,* MOL
- Ms S Skrdová, *Specialist for Gas,* CZECH ENERGY REGULATORY OFFICE
- Mr K Kmet, *Technical Director,* SPP (DIVISION OF SLOVTRANSGAS)
- A senior representative of a major oil and gas producer will join this session

- Given the importance the regional countries play in the delivery of oil and gas to the rest of Europe, what development plans are predicted for the year ahead?
- With the Hungarian major MOL already in the process of dividing its oil and gas divisions, what are their future strategies and plans?
- Strategies for the Czech Republic gas market, including a look at recent privatisation, market rules and the advantages its strategic location between East and West Europe provides, for the transit and supply of oil and gas.
- A look at the Slovakian gas market; including its current and future prospects for development.
- What new transportation routes are being negotiated across the region and what impact will they have on existing transit corridors?

12:30 Lunch

14:00 SESSION FIVE
DEVELOPMENT PLANS FOR OIL AND GAS SUPPLY AND TRANSIT IN NORTH EASTERN EUROPE

Focus: Poland, Ukraine, Belarus and the Baltic States

- Senior Representative, NAFTA POLSKA
- Mr P Christensen, *Vice President,* DONG
- Mr A Todychuk, *General Director,* UKRTRANSNAFTA
- Mr A Macijauskas, *Director,* LITHUANIAN GAS ASSOCIATION
- Mr A Rudnik, *General Manager,* UKRTRANSGAZ

- The Baltic Sea - a new 'Hanseatic' gas trading hub? A look at proposed pipelines for new transportation and transit routes of supply including an update and the status of the BalticPipe project.
- Developments in Poland: Following the governmental changes in the country, what is the strategic stance of companies involved in transportation of oil and gas? What impact will these plans have on potential investors?
- Will existing plans for new supply contracts and pipeline routes be effected?
- Creation of Gas Consortium for a Ukrainian Gas Transit Pipeline. What role will the Ukraine play in the export of oil and gas to Europe from Russia and the countries of the Caspian region? A look at the further development of the Odessa-Brody oil transportation system in its European energy integration.

15:30 SUMMARY OF THE SESSION PRESENTATIONS WITH THE OPPORTUNITY FOR OPEN FLOOR DISCUSSIONS

Chairman, Moderator:
Mr J Roberts, *Senior Editor,* PLATTS ENERGY GROUP

16:00 End of Day Two and Close of Conference

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★ HELLENIC PETROLEUM ★ VERBUNDNETZ GAZ ★

** speaker to be confirmed*

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26-27 NOVEMBER 2002, SHERATON SOFIA HOTEL BALKAN, SOFIA, BULGARIA

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