

PIRA's European Retainer Client Seminar

Monday-Tuesday, June 13-14, 2011

London Hilton Hotel

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Monday, June 13 — Registration & Plenary Sessions — 1:30-5:30pm

1:30 – 2:30 pm	— Registration — Grand Ballroom Foyer
2:30 – 3:10 pm	World Oil Markets — Dr. Gary N. Ross (Chief Executive Officer)
3:10 – 3:30 pm	Geopolitical Developments — Michelle Patron (Senior Director, Political Risk)
3:30 – 3:50 pm	World Refining and Product Markets — Richard L. Joswick (Managing Director, Global Oil)
3:50 – 4:10 pm	— Break — Grand Ballroom Foyer
4:10 – 4:30 pm	Global Gas Markets — Ira B. Joseph (Executive Director, International Gas)
4:30 – 4:50 pm	Global Coal Markets — Daniel J. Klein (Senior Director, International Coal)
4:50 – 5:10 pm	European Electricity Markets — Bruno Brunetti (Senior Director, European Electricity)
5:10 – 5:30 pm	Longer-Term Oil and Gas Market Issues — Dr. Mark A. Schwartz (President and Managing Director, Scenario Planning)

Cocktail Reception — Wellington Ballroom — 5:30-7:30pm

Tuesday, June 14 — Breakfast & Breakout Sessions — 8:00am-4:30pm

8:00 – 9:00 am	— Breakfast — Grand Ballroom Foyer	
	Breakouts — Grand Ballroom Section 1	Breakouts — Grand Ballroom Sections 2 & 3
9:00 – 10:20 am	Macroeconomic Developments in a Rapidly Changing World <ul style="list-style-type: none"> • <i>Short-Term Outlook: Risks and Prospects</i> — Peter Jaquette (Director, Global Oil) • <i>Longer-Term Outlook: Requirements for a Successful Global Transition Toward Non-OECD</i> — Dr. Mark A. Schwartz 	Shale and LNG: The New Gas Market Convergence <ul style="list-style-type: none"> • <i>European Shale Gas and Its Relationship to Pipeline/LNG Imports</i> — Ira B. Joseph • <i>Global Gas Retail Pricing</i> — Simon Heald (Senior Analyst, European Energy) • <i>Growing Gas Price Linkage Between Asia and Europe</i> — Mickey Kwong (Director, International Gas)
10:20 – 10:40 am	— Break —	
10:40 – 12:00 pm	Atlantic Basin Product Markets <ul style="list-style-type: none"> • <i>Trends in Product Demand and the Role of Biofuels</i> — David A. Zinamon (Man. Dir., Refining and Environmental Affairs) • <i>Implications for Refining, Product Trade Flows, Prices and Margins</i> — Richard L. Joswick 	Japan Repercussions : Rethinking the Generation Fuel Mix in Europe <ul style="list-style-type: none"> • <i>Europe's (Forced?) Retirements and Plant Profitability</i> — Bruno Brunetti • <i>Changing Carbon Market Dynamics</i> — Roman Kramarchuk (Man. Dir., Emissions and Clean Energy) • <i>Will Asian Demand Push Coal Out of Europe?</i> — Daniel J. Klein • <i>Dry Bulk Freight Markets</i> — Leonard Hockley (Consulting Senior Advisor)
12:10 – 1:20 pm	— Luncheon — Wellington Ballroom	
1:30 – 2:50 pm	Global and European Crude Supplies <ul style="list-style-type: none"> • <i>Near- and Medium-Term Non-OPEC Supply Outlook</i> — Frederick W.A. (Bill) Fuller (Senior Director, International Oil) • <i>Current OPEC Assessment</i> — Michelle Patron • <i>Crude Flows, Requirements and Implications for Brent Pricing</i> — Richard L. Joswick 	The Next Gas Revolution: Finding New Demand <ul style="list-style-type: none"> • <i>Myth and Fact: The Market for North American LNG Exports</i> — Mickey Kwong • <i>The Impact of Weaker Nuclear Generation on Gas and Other Fuels</i> — Daniel J. Klein • <i>Is Oil Indexation Holding Back Higher Gas Demand Growth in Europe?</i> — Ira B. Joseph
2:50 – 3:10 pm	— Break —	
3:10 – 4:30 pm	Drivers of the WTI Market <ul style="list-style-type: none"> • <i>Canadian and U.S. Mid-Continent Supply Outlook</i> — Frederick W.A. (Bill) Fuller • <i>PADD II / Cushing Balances and Pricing Implications</i> — Douglas M. Bulger (Managing Director, Project Consulting) 	The Surge in Renewables: Is It Sustainable? <ul style="list-style-type: none"> • <i>Regulatory/Policy Goals and the Technologies to Meet Them</i> — Roman Kramarchuk • <i>Growth in Renewables, Wholesale Prices and End-User Prices</i> — Bruno Brunetti • <i>Power Generation Expansion Under Uncertainty</i> — Dr. Lin Fan (Senior Analyst, European Energy)