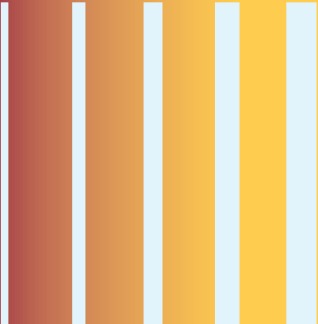


WPC EXPERT WORKSHOP



CHALLENGES OF THE EUROPEAN REFINING INDUSTRY IN A GLOBAL MARKET

Madrid 6th of November 2013

Hotel Palace

Sponsors

Introduction

The European refining markets are facing key challenges in the upcoming years due to fundamental changes in the oil sector that are redefining the worldwide refining industry model.

Oil Production-Consumption Map is changing around the world, where emerging countries are becoming key consumers, new producers will potentially appear due to technical advances in E&P and traditional consumer countries are becoming not only producers but also net exporters (as it is the case in the US). Finally, new refining exporting hubs are appearing in India, China, the Middle East, and other emerging economies, while in the OECD the refining capacity has been decreasing as a result of the closings. And, also, the so called “shale revolution” in the US means cheaper oil available for US refiners which will result in wider margins.

In sum, the implications of these fundamental changes in the next decades will profoundly restructure the oil sector map and European refiners will need to address this new scenario. Furthermore, the repercussions on the European Security of Supply position need to be analyzed, together with potential implications in sustainability and regulation.

The WPC EXPERT workshop will focus on identifying and analyzing the impact of these fundamental changes on the European market, not only from the industry point of view but also from a government and regulatory perspective. Furthermore, the workshop will highlight how the European refining companies are adapting their strategy to this new model.

The program has been organized in 3 Round Tables (RT): RT 1 “Structural changes in the international refining industry and its impact on markets”, will gather worldwide refining experts to give their views and opinions on the present and future of refining; secondly, RT2 “Competitiveness, Security of Supply and Sustainability”, will highlight the regulatory and security of supply side of the subject; finally, RT 3 “Strategic Implications for the European refining industry in the new scenario”, will focus on the strategy of European refiners in this new context.

Along with the RTs, the program will count with a presentation of the 21st World Petroleum Congress, which will be taking place in Moscow in June 2014, probably the most important Oil and Gas International Event which is held every three years.

This workshop, organized by the Spanish National Committee of the World Petroleum Council, will be attended by top level executives of the worldwide refining industry and by representatives of relevant international institutions who, along with the audience, will be discussing and sharing their points of view of this very relevant matter.

8:30 **REGISTRATION OF ATTENDEES**

9:00 **INAUGURAL SESSION**

Arturo Gonzalo Aizpiri
Vicepresident
CLUB ESPAÑOL DE LA ENERGÍA

Renato Bertani
President
WORLD PETROLEUM COUNCIL

9:15 **ROUND TABLE 1 – STRUCTURAL CHANGES
IN THE INTERNATIONAL REFINING
INDUSTRY AND ITS IMPACT ON MARKETS**

Chair:

Iván Martén Uliarte
Global Leader Energy Practice
The Boston Consulting Group

Speakers:

Gandham Sri Ganesh
Executive Director -Refineries, Corporate R&D
HINDUSTAN PETROLEUM, INDIA

José Carlos Cosenza
Downstream Director
PETROBRAS

Faisal Al Faqeer
Manager, Ras Tanura Refinery Engineering
Department
SAUDI ARAMCO

Representative from
North American Regional (tbc)

10:30 **ROUND TABLE 2 –
COMPETITIVENESS, SECURITY OF
SUPPLY AND SUSTAINABILITY**

Chair:

Juan Lladó Arburua
Vicepresident & CEO
TÉCNICAS REUNIDAS

Speakers:

Keisuke Sadamori
Director of Energy Markets and Security
INTERNATIONAL ENERGY AGENCY

Chris Beddoes
Director General
EUROPIA

11:30 **COFFEE BREAK**

12.00 **ROUND TABLE 3 – STRATEGIC
IMPLICATIONS FOR THE EUROPEAN
REFINING INDUSTRY IN THE NEW
SCENARIO**

Chair

Josu Jon Imaz San Miguel
President
Asociación Española de Operadores de
Productos Petrolíferos (AOP)

Speakers:

Jorge Lanza Perea
President
BP ESPAÑA

Pedro Miró Roig
Chief Executive Officer (CEO)
CEPSA

Ferenc Horvath
Executive Vice President Downstream
MOL

Nemesio Fernández Cuesta
Chief Operating Officer (COO)
REPSOL

Tom Schockaert
VicePresident Refining Base Chemicals, West
Europe
TOTAL

13.30 **PRESENTATION 21ST WORLD
PETROLEUM CONGRESS
Moscow, 15-19 June 2014**

Russian National Committee of the WPC

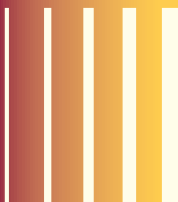
13.45 **MAIN CONCLUSIONS & CLOSING SESSION**

Pedro Miras Salamanca
Chairman
SPANISH COMMITTEE OF THE WPC

Pedro Miró Roig
Vicepresident
CLUB ESPAÑOL DE LA ENERGIA

José Manuel Soria López
Minister of Industry, Energy and Tourism
GOVERNMENT OF SPAIN

14.15 **END OF THE CONFERENCE. COCKTAIL**



CHALLENGES OF THE EUROPEAN REFINING INDUSTRY IN A GLOBAL MARKET

6th of November 2013

Hotel Palace

Registration form

Name

ID/Passport

Company

Position

Address

City/Country

Postcode

Telephone

Fax

E. mail

In accordance with Organic Law 15/1999, December 13, regarding the protection of personal information, you are hereby informed that the information you provide in the accompanying form will be saved in a data file that is property of the Spanish Energy Club, and will be used to complete your application to the current workshop and to send you business and promotional information about our products and services. To this end, you expressly recognize and accept that the Spanish Energy Club may be required to share some part of your personal information with the affiliated third parties participating in the organization of the current workshop and with other participants in same, as well as certain authorities (including fiscal authorities), accountants, auditors, lawyers or other external assessors or providers of products and services to the Spanish Energy Club. If in the future you would like to cancel your consent or access, change or cancel your personal information, or file a complaint about the treatment of said information, please communicate in writing to: Club Español de la Energía, Paseo de la Castellana, 278.1^º Planta. 28046 Madrid.

General Information

Location

Hotel Palace
Plaza de las Cortes, 7
28014 Madrid

Registration

Club Español de la Energía
Paseo de la Castellana, 257 -1^a planta
28046 Madrid
Tel.: +34 91 323 72 21- ext. 11
Fax: +34 91 323 03 89
inscripciones@enerclub.es
basedatos@enerclub.es
www.enerclub.es

Registration Fee

Free by personal invitation.
Confirmation needed before 20th october.
Space is limited.

Travel Arrangements

For any query regarding ticket or hotel reservations please contact:

THAI EVENTOS

Pº de la Castellana, 257 28046 Madrid
Phone. +34 91 619 44 77
Contact: David Corredera.
Email: david.corredera@viajesparaempresas.es



Pº. de la Castellana, 257-1ª planta
28046 Madrid
Tel.: 91 323 72 21 / Fax: 91 323 03 89
E-mail: inscripciones@enerclub.es
www.enerclub.es

Asociados Ejecutivos

