

Bridging the US Boom: *Global Markets Prepare*

There is no question the surge in unconventional extraction has everyone looking toward the US for what's coming next. What began as a natural gas bonanza has transformed into a suite of hydrocarbons, prolific in production. As this boom echoes across the planet, shaking the global panorama with talk of exports, creating new markets and disposing of others, the world must prepare itself while this vast potential takes hold. Power producers contemplate important choices on fuel supplies, midstream and downstream industries see opportunities that haven't been available for years and infrastructure providers may benefit most of all. The opportunities are limited only by the prudence of strategic investments and clarity of regulatory direction. The real success of this revolution, seen in several decades, will be determined by the response the global industry makes today.

8:00 – 9:00 am **Registration**

9:00 am **Opening Remarks**
Miguel Martínez San Martín, Executive Director, Finance, **Repsol**

9:15 – 10:45 am **Advanced Energy: Investing in the Future**

While cheap, reliable gas and other hydrocarbons in the US fuel the bulk of a growing world for the next few decades, what are the smart investments in technology, people and efficiency solutions which can be made today that will lead to an era of advanced energy? Are renewables still viable or do they lose steam to smarter ways of extracting and consuming abundant fossil fuels? We'll discuss what an advanced energy future encompasses, with alternative energy production, the latest technologies and real-world demands at the forefront.

Philip Tenenbaum, Senior Partner, **Mercer** (*Moderator*)
Wal van Lierop, President and Chief Executive Officer, **Chrysalix Energy Venture Capital**
Lucian Pugliaresi, President, **Energy Policy Research Foundation**
Mark Little, Chief Technology Officer, **General Electric**
Dan Arvizu, Director, **National Renewable Energy Laboratory**

11:00 – 12:30 pm **Executive Roundtable: Switching, Ditching and Bridging Fuels**

While US utilities seem blessed with cheap, abundant natural gas, Europe faces a much different supply situation, despite aggressive carbon targets. Asian utilities are pressed even harder for fuel sources as demand furiously expands. Does nuclear keep clawing for its place, can alternative energies fit into the power mix and will switching from coal to gas make as much sense in 20 years as it does today? Current choices impact future generations. We'll hear from the visionaries who are out in front, making the hardest decisions, while others wait to react.

Scott Turner, Energy Practice Lead, **Nixon Peabody** (*Moderator*)
Andrés R. Gluski, President and Chief Executive Officer, **The AES Corporation**
Leonhard Birnbaum, Member of the Board of Management – Markets, Services, **E.ON**
David Crane, President and Chief Executive Officer, **NRG Energy**

12:30 – 2:00 pm **Award of Excellence Ceremony Lunch**
Keynote Luncheon



Dr. Ernest Moniz
United States Secretary of Energy

2:00 – 3:00 pm **Midstream Gathers Momentum**

The story of the last five years has been investments in renewable energy and technologies to discover and extract unconventional natural gas and petroleum. The headline of the next five will center on midstream and downstream industries. Domestically, US production is prompting pipelines to be built, rail transport to play a more significant role in the supply chain, and refining to adapt and grow. Global markets will also have to evolve, prompting shipping markets to expand and new builds of refineries, storage and LNG import and export terminals. We'll examine the challenges, hold-ups and impacts of these global shifts.

Chris Faulkner, President and Chief Executive Officer, **Breitling Oil and Gas** (*Moderator*)
Charif Souki, Chairman and Chief Executive Officer, **Cheniere Energy**
Adam Sieminski, Administrator, **Energy Information Administration**