

SEWELION

SECURING OUR ENERGY FUTURE

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Workers carry out a practice drill in case of a hydrogen sulfide leak at a natural gas appraisal well of Sinopec in Sichuan, China. REUTERS/Stringer

Natural Gas Expected to Burn Bright in Asia's Fuel Mix

NATURAL GAS, a cleaner energy source than oil and coal, is paving the way towards renewable energy sources, and promises to be a game changer, officials and industry participants at the EMART energy trading summit said.

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Asia has stepped up its use of gas threefold over the last two decades, said Singapore Minister of State for Trade and Industry Teo Ser Luck, noting that each unit of electricity the island nation uses today is cleaner than it was ten years ago, since natural gas emits half as much carbon dioxide as fuel oil.

"In the case of Singapore, our fuel mix has evolved dramatically over the past decade from 71 per cent reliance on fuel oil to more than 80 per cent natural gas today," he added.

Within the Association of Southeast Asian Nations (ASEAN), several countries are building infrastructure to aid the integration of liquefied natural gas (LNG) as a major fuel source, Teo said.

Regional prospects for energy security are further boosted by the grouping's long-term goal of creating an integrated energy market – underpinned by such initiatives as the ASEAN Power Grid and Trans-ASEAN Gas Pipeline.

Asia is not just one of the largest consumers of natural gas, it is also seen as the global hub for LNG design and component construction, said Kelvin Sim, technical manager of Cheetak Oil & Gas.

"In the global context of rising energy demand, natural gas must be viewed as a key industry game changer," he added.

Other experts said the nuclear crisis in Japan that followed the earthquake and tsunami last March hit the country's energy sector hard, making it necessary to import unprecedented quantities of liquefied natural gas in the long term to offset the loss of nuclear power capacity.

Already considered one of the world's largest importers of LNG, Japan's demand is expected to rise further as a result, with much of the extra fuel expected to come from Qatar, one of the world's largest LNG producers, while other key suppliers include Russia, with East Siberia and the Caspian region being important suppliers.

EMART Asia, held in conjunction with the Singapore International Energy Week (SIEW), is the leading Asian summit for energy trading, featuring a two-day conference, exhibition and pre-summit seminars among other events designed to enhance Singapore's position as an energy trading hub.

"This EMART Asia summit has strengthened the confidence of governments in the region, particularly the developing governments in China and India and in Southeast Asia, that natural gas can be a major base-load fuel for their economic development and energy security," said Yusoff Rahman, of Malaysia's Perhadahan Holdings.

He said that to become a baseload fuel, natural gas must be used in power generation and countries with rapidly growing electricity demand need confidence there is an adequate supply of the baseload fuel at reasonable price.

Indian delegate Rahul Thanpak said EMART Asia underscored the importance of gas in slowing the growth of coal use in Asia.

"China and India alone are expected to account for 80 per cent of the entire global increase in coal consumption over the next 25 years, with 80 per cent of that coal being used to generate electricity," he said.

"China's coal consumption could double in the next 20 to 30 years, and the environmental and CO2 consequences of that are deeply problematic."

Natural gas can be a bridge to slow this coal consumption curve in Asia, said Thanpak, as for the next 20 years, solar, wind, hydroelectric, and nuclear power cannot take up the slack of electricity demand growth.

"We need something in the interim, and that something must be natural gas."



A worker moves gas canisters at a natural gas supply station in Wuhan, China. REUTERS/Stringer

SMART GRIDS

Asia Adopts Smart Grids as Demand for Improved Power Supplies Grows



The Asia Smart Grid Exhibition, as part of Singapore International Energy Week 2011. Credits: Tom White

ASIAN nations are taking swiftly to Smart Grid technology as economic growth drives expanding demand for electricity and the technology offers cleaner and more efficient generation, transmission and distribution capabilities, participants at the Asia Smart Grid 2011 exhibition said.

In Asia, there is an aggressive deployment of smart meters, with the goals of reducing electricity

use, empowering consumers, and saving money for both consumers and suppliers, Sunny Liew of Sanyo Asia said.

The installed base of smart meters in Asia Pacific will total more than 350 million by 2016, with countries such as Japan, China, and Australia achieving smart meter penetration rates among the highest in the world, a Sanyo study shows.

"We've noted here that as carbon reduction and energy efficiency efforts

grow, smart meters and advanced metering infrastructure play a vital part in an overall smart grid strategy," Liew said.

"Indeed, in many Asia Pacific nations smart metering is regarded as the fundamental step in reducing CO₂ emissions and fostering a cleaner society."

The exhibition, part of the Singapore International Energy Week, brought together leading industry players across the entire



The Asia Smart Grid Exhibition, as part of Singapore International Energy Week 2011.
Credits: Tom White

electricity and utilities value chain, with many participants noting the adoption of a variety of different smart grids in the region.

“Chinese market players believe the construction of a smart grid is a key part of economic growth and enhancing the ability to optimise energy allocation,” said Joseph Low of NEC Asia Pacific.

Japan’s electric utilities have invested huge amounts of capital in power infrastructure, resulting in advanced capabilities in transmission infrastructure and power delivery services, but the March 2011 earthquake, tsunami, and resulting Fukushima nuclear accident were likely to redefine not just Japan’s smart grid planning, but perhaps the direction of its utility industry also.

South Korea wants to leverage its technology leadership in information technology and communications to build an advanced smart grid infrastructure, besides looking to export the technology, said Stephanie Leong of KOTRA (Korea Trade-

Investment Promotion Agency.

The exhibition had helped to set the stage for international smart grid providers and suppliers to exchange and share knowledge with Asian policymakers, regulators, utilities companies and system integrators, she added.

“We’ve had many enquiries to smart grid projects in the region and this Asia Smart Grid event has proved

to be very productive,” she said.

Exhibition visitors were generally looking for home or building automation networks, infocomm technologies, energy storage, and smart metering, amongst many other products and services.

The conference also provided insights on investment opportunities, regulatory challenges and considerations, implementation issues, as well as practical lessons through country-focused presentations, panel discussions and a facility visit to Singapore’s Experimental Power Grid Centre (EPGC).

“Energy markets in the Asia Pacific region are experiencing a period of significant growth and development, driven both by expanding electricity demand as well as new opportunities for cleaner and more efficient power generation, transmission, and distribution,” said Chougule Jinahar, senior manager of India’s BSS Group, which has a strategic presence in ASEAN and the Middle East.



The Asia Smart Grid Exhibition, as part of Singapore International Energy Week 2011.
Credits: Tom White

Asia LNG Swaps to Expand on Rising Physical Trade

A swaps market for liquefied natural gas (LNG) is set to take off in Asia as players look to hedge the growing volume of physical spot trades in the region, a senior executive at Citi's LNG business said on Friday.

The emergence of a paper market for the fuel will lift price transparency and encourage more players to enter the market, said Sid Bambawale, Citi's Director LNG, Asia Pacific Markets.

"The immediate impact will be to provide greater transparency and attract new players to the market," Bambawale told Reuters at Singapore International Energy Week.

The entry of new buyers in South East Asia and more uncontracted supply expected to come online in the next few years will raise the volume of spot or short-term trades in the market to around 30 percent of the market in the next 5-10 years, up from around 20 percent currently, he said.

New LNG plants coming online are committing around 80 to 85 percent of their output to long-term deals, down from almost 100 percent a few years earlier, resulting in more cargoes for spot trading.

"They are holding some output back because they are unsure of their production or they expect short-term prices to rise, which means more uncontracted LNG making its way into the market," he said.

The emergence of Asian gas pricing indices not linked to oil will also help boost the swaps market, with two to three indices currently jockeying to become the pricing



A file photo of the Trans-Bay Gas Pipeline, a 20km liquefied natural gas (LNG) pipeline running underneath Tokyo Bay, Japan. REUTERS/Toru Hanai

benchmark for the region.

Interest in an independent pricing benchmark picked up after Japan's nuclear outages in March saw significant volumes of spot LNG cargoes headed to the country.

But the entry of more players in the fledgling swaps market will be needed for it to gain traction. Citi executed the first ever financially settled LNG swap in January 2011.

The bank has since transacted more swaps deals, Bambawale said, without giving details.

Citi is also active in the physical market, having traded 10 cargoes in 2011, up from around eight last year. He expects this to rise again next year as new buyers and sellers enter the market.

Their volumes are usually sourced from Europe and the Middle East and sold in Asia, he added.

The start of U.S. shale gas exports

is a small first step to linking North American markets to Asia, but LNG prices between the two regions are unlikely to converge until export volumes rise significantly.

"We are seeing an interconnection between markets but it is not significant enough to create a convergence in prices," said Bambawale.

Last month, BG Group became the first company to seal a U.S. LNG export deal when it signed a 20-year agreement to source gas from Cheniere Energy's upcoming LNG export terminal at Sabine Pass in Louisiana.

Asian LNG prices for November delivery were seen at around \$17 per million British thermal units this week, compared to under \$4 for U.S. spot gas prices.

(Reporting by Francis Kan,
Editing by Miral Fahmy)

Struggle for Energy Pushes SE Asia to Keep Nuclear on the Table



A view of the Bataan Nuclear Power Plant (BNPP) in Bataan, north of Manila, Philippines, which although completed in 1984 has yet to start operations. REUTERS/Erik de Castro

By FRANCIS KAN

THE need to meet surging energy demand without boosting already high fuel prices could see Southeast Asian governments push hard for nuclear power despite public safety concerns.

Some countries have announced plans to quit the industry after the March tsunami and earthquake in Japan triggered the world's worst atomic disaster in 25 years, sparking doubts about nuclear safety.

But Southeast Asia's power-hungry emerging economies cannot afford the alternatives, which are to import more

fuel or invest in large scale deployment of renewable energy.

Industry and government officials in Singapore this week for an energy conference said countries such as Thailand and Malaysia, which initially called for a review of nuclear power plans after the accident in Japan, are coming around to the view that they cannot abandon it.

Regardless of how keen governments might be to trim costly subsidy bills and reduce dependence on natural gas and other fuel imports, it will be over a decade before the first

nuclear plant could feasibly be ready.

"In the longer term, you cannot neglect the possibility of nuclear. We are pursuing and looking at it microscopically. But it will happen only past 2020," said Idris Jala, Malaysia's Minister in the Prime Minister's office.

Six countries in Southeast Asia, including Vietnam, Thailand, Malaysia, Indonesia, the Philippines and Singapore, have expressed interest in building nuclear power stations.

Vietnam has committed to building a nuclear power plant, with the others

at various stages of conducting feasibility studies.

S Iswaran, Singapore's Second Minister of Trade and Industry, reaffirmed earlier this week that the nuclear option for the city-state was still on the cards.

"The reaction of most governments has been fairly pragmatic and mostly rational," said Selena Ng, regional director, South East Asia and Oceania, at French nuclear firm AREVA SA.

"The fundamental drivers behind nuclear power post-Fukushima are the same as they were before Fukushima and most governments realise this."

AREVA, which designs and supplies nuclear reactors, assisted Japan's TEPCO in dealing with the Fukushima accident.

Ng said that construction of new plants continued in many countries, and only a handful of European countries, including Germany, Italy and Switzerland have, in varying degrees, rejected its use.

The latest to do so is Belgium, whose political parties reached a conditional agreement earlier this week to shut down the country's two remaining nuclear power stations, owned by GDF Suez unit Electrabel.

But an expected power crunch in Southeast Asia may mean the region does not have the luxury of axing the nuclear option for political reasons.

"Moving away from nuclear to renewables to whatever is more costly, it means more imports, which means less energy security," former International Energy Agency (IEA) executive director Nobuo Tanaka said in an interview with Reuters at Singapore International Energy Week.

"Germany can afford to cut nuclear, they have a lot of resources, but it's different for Asian countries."

Southeast Asia's demand for power will grow to 163,000 megawatts in 2020, from about 92,000 megawatts



Volunteers participate in a "Save the Earth" display during a "wayang kulit" — a Malay traditional shadow puppet performance, after lights were turned off for Earth Hour in Kuala Lumpur. REUTERS/Samsul Said

now, according to data from energy consultancy Wood Mackenzie.

COSTS OF NO NUCLEAR

Public fears about nuclear safety have since March prevented Japanese authorities from giving utilities the go-ahead to restart reactors closed for regular maintenance. The country's entire reactor fleet could be shut down by next summer, costing Japan around 3 trillion yen in additional energy imports.

It is not only Japan that is affected though. The country's demand for gas to replace the lost nuclear capacity has pushed Asian LNG spot prices to around \$17 per million British thermal units, from around \$10 before Fukushima.

The rise in gas and power prices must be weighing on the minds of policy makers.

"Asian spot LNG prices will stay very firm because of the sudden jump in demand from Japan, and if Japan decides to switch off all nuclear capacity, the market for LNG will be even more tight," said Tanaka.

A DECADE AWAY

Still, nuclear power is not likely to make an appearance in South East Asia for at least another decade.

"Even if governments make a decision now on nuclear, we won't see anything happening before 2025 or 2026 at the earliest," said Graham Taylor, head of Asia Power and Gas Research at Wood Mackenzie.

The process of getting approval from the International Atomic Energy Agency and securing qualified personnel to operate the plants will add to the timeline, apart from what it will take to actually build the infrastructure, he said.

Around 15-20 percent of the nuclear projects that are expected to come online by 2030 will be delayed due to additional safety measures being undertaken post-Fukushima, AREVA's Ng estimates.

(Additional reporting by Manash Goswami; Editing by Simon Webb and Michael Urquhart)

COLUMN

If Everybody Likes Oil Below \$100, Why is it Higher?

By CLYDE RUSSELL

PRODUCERS and consumers are happy with Asian crude oil prices in a range between \$80 and \$100 a barrel is the consensus emerging from the Singapore International Energy Week.

Sounds great, small problem is that the regional benchmarks are already north of \$100 a barrel and show little sign of dropping, even in the face of confusion in Europe and a slowing global economy.

The main regional benchmark Dubai crude is \$103.18 a barrel and has been above the \$100 level since February, apart from a little dip at the start of last month.

The other marker that matters for Asia, Brent, is trading around \$109 a barrel and like Dubai crude has been in three figures since February, with prices settling below only once in October.

Both are headed for their highest

year-average prices on record even as the world economic outlook becomes more cloudy amid the ongoing European sovereign debt crisis, anemic growth in the United States and a mild slowing in Asia's powerhouse, China.

Oil prices above \$100 a barrel are a threat to the global economy and are already having an impact, Richard Jones, the deputy directory of the International Energy Agency, told Reuters in an interview at SIEW, a top-level gathering in Asia's oil-trading hub.

If the cost of oil reaches 5 percent of gross domestic product, it starts to hurt growth, Jones said, pointing out that this is what happened in before the 2008 financial crisis and subsequent recession.

While the world probably isn't in as dire straits as it was in 2008, there is no doubt that the risks of a global

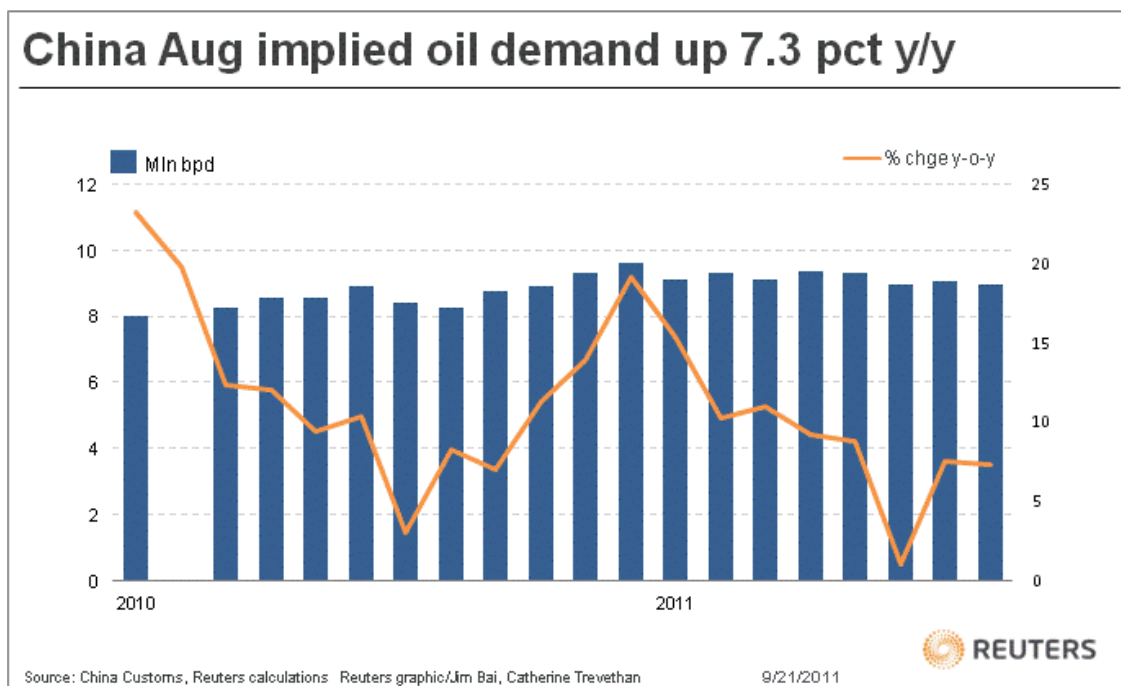
slowdown have increased, as shown by the demise of MF Global.

Even producers would be comfortable with oil prices lower than they are currently, with Mohammed bin Dhaen al-Hamli, the United Arab Emirates' oil minister, nominating \$80-\$100 a barrel as his preferred range in comments at the SIEW.

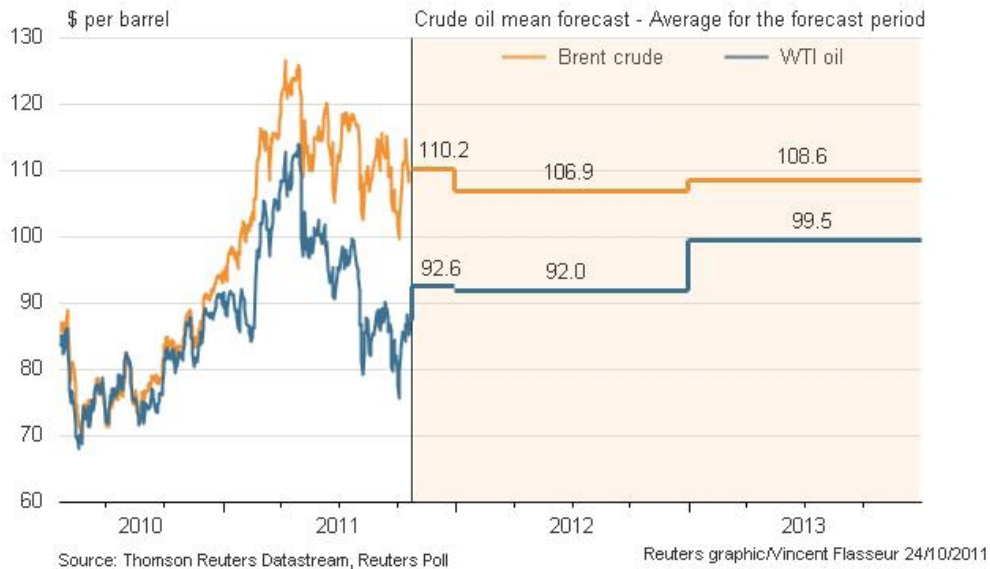
This was the first indication of where prices should be from a major Gulf Arab producer since the June meeting of the Organization of the Petroleum Exporting Countries ended in disagreement over whether output should be raised to curb prices.

Adding weight to the oil should be less than \$100 a barrel was Jose Gabrielli, the chief executive of Petroleo Brasileiro, who said he was happy with the price between \$80 and \$95.

So why is oil higher if nobody really wants or needs it above \$100 a barrel?



Reuters oil poll - October 2011



A certain premium is in the Brent price because of the supply disruptions from Libya and the North Sea, but the market seems to be “well-supplied,” to use a phrase favoured by producers such as Saudi Arabia.

On the demand side, while it is still growing, the IEA and others have progressively scaled back forecasts to the point where the developed world is expected to be stagnant and growth is mainly coming from the Middle East and Asia.

And it’s here that the reason oil is above \$100 a barrel may well be found.

China’s oil demand is expected to grow 6 percent in 2012, or 600,000 barrels a day.

While this is half the pace of 2010, it’s still enough to ensure that world crude markets are more likely to be tight rather than oversupplied.

If you add India to China, there is some 1.5 million barrels a day of new refining capacity coming on stream in the coming year to 18 months.

It’s very unlikely that these new refineries will sit idle, meaning crude demand is heading higher as the plants ramp up and build commercial inventories.

Of course, higher demand in Asia may be offset by lower demand elsewhere, especially if the new refining capacity feeds into exports rather than domestic demand.

If you wanted to get oil prices to drop below \$100 a barrel, there are three ways this could happen.

The first is a new global recession sparked by a messy default by Europe’s mendicants, the second is a sizeable increase in supplies and the third is lowering Asian demand by ending fuel subsidies.

Of these, the first is the most likely but probably still not the base case scenario.

The second is very unlikely, at least until prices rise to levels well above \$120 a barrel, and even when they did in the middle of this year, OPEC couldn’t agree to boost output.

And the third is extremely desirable, but unlikely in the short term, even if in the longer term it will become necessary.

Some Asian countries have moved to a more market-related pricing system for oil products, such as India and China, but very few nations in Asia have full exposure to the international

oil price.

Ultimately fuel subsidies will prove unsustainable in Asia, but removing them is very difficult for politicians as the public is hooked on cheaper fuels and don’t realise the opportunity costs of providing subsidies.

It also seems that as Asia gets richer, subsidies are mainly benefiting the emerging middle class who have cars and more electric appliances than the poor.

In this case, removing subsidies, and perhaps even taxing fuel, will be sensible, especially if the government revenue saved was used to alleviate genuine poverty.

But for now, Asia’s fast economic growth and fuel subsidies are enough to keep oil above \$100 a barrel, and we may just have to live with that.

After all, if prices were to drop below \$100, it would be because the world economy is going down the gurgler again, and in that case expensive oil is the better alternative.

Clyde Russell is a Reuters market analyst. The views expressed are his own.

(Editing by Himani Sarkar)

SIEW 2011 Wrap Up

CHEE HONG TAT, Chief Executive of Energy Market Authority of Singapore, offers his views on Singapore International Energy Week 2011.



Chief Executive of Energy Market Authority, Chee Hong Tat at SIEW 2011. Credits: Energy Market Authority of Singapore (EMA)

1) Was SIEW 2011 a success?

This year's Singapore International Energy Week 2011 continues to be a focal point for fruitful conversations and fostering public-private collaborations, as shown by the event's biggest turnout to date of 18,000 participants from over 60 countries, and 550 exhibitors.

This has been an eventful year for the energy world. Geopolitical developments around the world have cast a spotlight on the cost, security and safety of our energy supplies. In Asia, we are facing a daunting challenge to find energy options that are economically

competitive, secure and clean.

The theme, "Securing Our Energy Future", was therefore an apt reminder on the urgent need to rethink energy policies to ensure a stable supply of energy for the future against a fluid backdrop of energy developments. SIEW this year not only successfully provided a platform for high-energy dialogue in the region, it underscored Singapore's commitment and met the strategic objectives to becoming a global leading energy hub and "living lab".

The Singapore Energy Lecture,

headlined by Nobuo Tanaka, former Executive Director of the International Energy Agency, saw its biggest turnout of almost 1,000 people, while more than 500 people attended the Singapore Energy Summit sessions.

The stellar line-up of speakers and events this year has garnered positive feedback from the participants. Many delegates were impressed with the relevance of the sessions in terms of the energy challenges that were tackled and debated on by experts on the subject matter, as well as the quality of the speakers that SIEW was able to

attract. Even exhibitors, speakers, and researchers themselves were impressed with SIEW as a networking platform, as they were able to leverage on SIEW to forge partnerships, establish business development and deal-making opportunities critical to driving energy investments and innovation.

2) What are some of the key highlights for you in your capacity as the Chief Executive of the Energy Market Authority (EMA)?

The Singapore Energy Lecture set the tone for the week with a dynamic and thought-provoking keynote by Mr Nobuo Tanaka. Fresh off his position as the Executive Director of the International Energy Agency (IEA), Mr Tanaka’s frank assessment of the energy landscape and Asia’s need for

a new framework on energy security, due to global economic uncertainty and volatile energy prices, offered much food for thought.

Another highlight was the opportunity to witness two key energy giants, Shell and Petrobras, meet on the same stage for the first time in Asia. This reflects SIEW’s growing status as a leading energy platform which continues to attract the key opinion leaders in the industry. SIEW offered me and many others during the Week a great platform to network with industry leaders across the energy community, from oil & gas, to renewables, energy trading and smart grids.

On a more personal note, SIEW also presented me with my first real opportunity to work with new colleagues on a project of such scale

and I am really glad that the event has been a resounding success.

3) What were some of the key announcements made at SIEW 2011?

There have been substantial developments within the local and regional energy sector, and this year, SIEW was the platform at which many of these key announcements were made. Such developments continue to highlight Singapore’s commitment to map out sustainable solutions for the future.

The week saw corporate announcements such as Trina Solar and Phoenix Solar setting up their regional headquarters in Singapore. EDB also announced the region’s first floating photovoltaic test-bed project at Tengeh Reservoir. Five companies were also



Chief Executive of Energy Market Authority, Chee Hong Tat at SIEW 2011. Credits: Energy Market Authority of Singapore (EMA)

recognised for their contributions to the innovations in terms of system design, size and installation techniques, and help to build solar system integration capabilities at the third Solar Pioneer Awards.

The Agency for Science, Technology and Research (A*STAR) officially opened the Experimental Power Grid Centre (EPGC) during the week. One of the largest in the world, the EPGC will spur research & development collaborations for future energy and smart grid solutions.

Singapore also announced the commencement of a public consultation exercise by the end of this year on the regulatory framework to govern electricity imports to the city-state. Updates were also made on existing programmes that contribute to Singapore's energy security, including the Renault-Nissan Alliance that will see the introduction of the Renault Fluence Z.M. and Nissan Leaf to the EV test-bed. EMA also appointed a Singapore-consortium to design build, own and operate the micro-grid test-bed on Pulau Ubin.

The above highlights continue to affirm Singapore efforts to establishing and developing Singapore as an energy hub and a "Living Lab", fostering further growth of Singapore's energy sector.

4) What are the key challenges for the energy industry looking forward to 2012 and what do you think will be the core themes which will emerge?

The discussions over the last one week at SIEW have highlighted key issues and challenges that governments

and the energy industry need to work together on going forward.

In terms of nuclear, Nobuo Tanaka acknowledged the impact of Japan's recent nuclear incident on energy security, the global energy fuel mix and climate change during his presentation at the Singapore Energy Lecture. However, the question should not be on whether nuclear power should remain an option for the energy future, but how it could be made safer and more secure.

As oil prices continue to remain high amidst an already uncertain global economic outlook, industry watchers are concerned that this would exacerbate the situation. Another key concern would be to ensure that the global supply chain can continue to support the energy industry. With these challenges ahead, alternate energy solutions such as gas and renewables are now gaining importance in the global energy mix.

In view of the above intertwined challenges and concerns raised, governments need to have a long-term and holistic view on the sustainability of their energy mix. The use of energy is inherent in our lives, and it impacts other aspects such as water, food, transport and urban development as well. It is therefore imperative that governments bear in mind that the development and implementation of energy policies not only define their own energy future, but that of other countries as well.

5) What can we look forward to in SIEW 2012?

Each year, partnerships that are formed and discussion threads that

take place during SIEW are continued well after the event is over. SIEW should therefore be seen as a yearly benchmark where key changes and developments within the global energy sphere can springboard from.

Next year, Singapore International Energy Week 2012 will take place from 5-9 November 2012, with two new events added to the line-up – the Gas Asia Summit and the Asia Future Energy Forum.

Gas Asia Summit, a conference dedicated to the natural gas industry, will reflect on how gas has emerged as a potential game changer that can significantly reshape global energy markets.

The Asia Future Energy Forum, which forms part of the World Future Energy Summit series that is the largest renewable energy-centric event in the world presently, will continue to provide additional opportunities to the growing renewable energy community.

These new events add value to SIEW and also highlight the rapidly-changing energy landscape and need for relevant platforms where issues pertaining to gas and renewables can be discussed.

Overall, SIEW 2012 will continue to be the premier platform where policymakers and key decision-makers from around the world can come together in one week, in one location to map out sustainable solutions for the future.

