

## TABLE OF CONTENTS

1. INTRODUCTION .....	11
2. THE LIMITS OF POLISH UNCONVENTIONAL PRODUCTION .....	14
2.1 GEOLOGY .....	14
2.2 THE ENVIRONMENT .....	16
2.3 INFRASTRUCTURE .....	21
2.4 THE REGULATORY FRAMEWORK .....	25
2.4.1 The Licensing Process .....	25
2.4.1.1 Changes Brought by the New Geological and Mining Law .....	34
2.4.2 Evaluation .....	36
3. THE EUROPEAN UNION .....	38
3.1 RELEVANT ACTORS AND INSTITUTIONS .....	38
3.1.1 The Council of the EU/The Council of Ministers – Transportation, Telecommunication and Energy Council .....	39
3.1.2 The European Commission .....	41
3.1.2.1 DG Energy .....	43
3.1.2.2 DG Environment .....	43
3.1.3 The European Parliament .....	44
3.1.4 Lobbyist and Information Groups .....	46
3.1.4.1 Energy Company Offices .....	46
3.1.4.2 Industrial Unions .....	47
3.1.4.3 Nongovernmental Organizations (NGOs) .....	47
3.2 THE EU PLAYING FIELD .....	47
3.2.1 DG Energy .....	47
3.2.2 DG Environment .....	49
3.2.3 The European Parliament .....	51
3.3 EU UNG LEGISLATIVE TREATMENT .....	53
3.3.1 Environmental legislation .....	54
3.3.1.1 Environmental Impact Assessment (EIA) .....	55
3.3.1.2 REACH .....	56
3.3.1.3 NATURA 2000 .....	57
3.3.1.4 The EU Water Framework Directive .....	59
3.3.1.5 Mining Waste Directives .....	60
4. POLICY ANALYSIS: THE POLISH STAKEHOLDERS' PERCEPTION OF THE UNG DEVELOPMENT .....	61
4.1 THE DEFINITION OF STAKEHOLDERS .....	61
4.2 PERCEPTION GRAPHS .....	62

4.2.1.1 Government (GOV) .....	63
4.2.1.2 PGNiG .....	65
4.2.1.3 Private companies (IOCs).....	67
4.2.1.4 Environmental NGOs .....	69
4.2.1.5 EU .....	71
5. THEMES IN THE FOREIGN POLICY DISCOURSE OF THE RUSSIAN FEDERATION RELATED TO UNCONVENTIONAL NATURAL GAS .....	73
5.1 THE IMAGE OF RUSSIA AS A RELIABLE SUPPLIER.....	75
5.2 THE CHOICE BETWEEN CONVENTIONAL AND UNCONVENTIONAL RESOURCES.....	80
5.3 RUSSIAN CONVENTIONAL RESOURCES AND THE BEGINNING OF THE NATURAL GAS ERA .....	84
5.4 THE COMPETITIVE RELATIONSHIP BETWEEN CONVENTIONAL AND UNCONVENTIONAL RESOURCES.....	86
6. POLISH UNG EXTRACTION AND ITS IMPLICATION ON CENTRAL-EUROPE .....	88
6.1 SCENARIO SETTINGS.....	88
6.1.1 The Reference Scenario .....	90
6.1.2 Nord Stream Scenario .....	92
6.1.3 Scenarios 1-3.....	93
6.1.4 Scenarios 3-5.....	94
6.2 SIMULATION RESULTS.....	95
6.2.1 The Reference Scenario .....	95
6.2.2 Nord Stream .....	96
6.2.3 Scenario 1.....	98
6.2.4 Scenario 2.....	99
6.2.5 Scenario 3.....	100
6.2.6 Scenario 4.....	101
6.2.7 Scenario 5.....	102
7. CONCLUSIONS.....	104
8. METHODOLOGY APPENDIX.....	113
8.1 STAKEHOLDER ANALYSIS (Chapter 4).....	113
8.2 QUALITATIVE CONTENT ANALYSIS (Chapter 5).....	118
8.3 THE MEOS MODEL (Chapter 6) .....	119
9. BIBLIOGRAPHY.....	121
10. NOMINAL INDEX .....	132