

TABLE OF CONTENTS

1. INTRODUCTION	11
2. OVERALL METHODOLOGY	13
3. ANALYSIS	14
3.1 POLAND	14
3.1.1 Methodology	14
3.1.2 General Background	15
3.1.2.1 History of The Natural Gas Industry.....	16
3.1.2.2 Impact of Unconventional Resources and LNG Technology	17
3.1.2.3 Shifting balances and policies	18
3.1.2.4 Security and Safety Concerns	18
3.1.3 The Legal Basis of Hydrocarbon Production in Poland	19
3.1.3.1 Concessions and Mining Usufruct	19
3.1.3.2 Personnel Qualification.....	20
3.1.3.3 Tax Scheme.....	20
3.1.3.4 Geological Information	21
3.1.3.4.1 Complementarity of Protection	21
3.1.3.4.2 Geological Information As A State Secret.....	23
3.1.4 Critical Infrastructure	24
3.1.4.1 The Existing Natural Gas Infrastructure	25
3.1.4.1.1 Polish Pipeline System: The Present	26
3.1.4.1.2 The Polish Pipeline System: The Future	27
3.1.4.2 The Pipeline System and The Shale Gas Production	29
3.1.5 Impact Factors	32
3.1.5.1 Initial Verification.....	32
3.1.5.2 The Interview	33
3.2 THE CZECH REPUBLIC	39
3.2.1 General Information and Recent Developments	39
3.2.2 Licensing Process	43
3.2.2.1 Exploration	43
3.2.2.2 Production	48
3.2.2.2.1 Land Access	50
3.2.2.2.2 Technology	50
3.2.2.2.3 Royalties	50
3.2.2.2.4 Protection of The Environment.....	50
3.3 CURRENT DEBATE ON THE EXTRACTION OF SHALE GAS AT THE EU LEVEL	53
3.3.1 The European Commission	54
3.3.2 The European Parliament.....	57

4. INTERPRETATION	60
4.1 POLAND	60
4.1.1 Impact Factor: Regulation	60
4.1.2 Impact Factor: Information	61
4.1.3 Impact Factor: Infrastructure	61
4.1.4 Impact Factor: Security	62
4.2 THE CZECH REPUBLIC	63
4.3 EUROPEAN UNION	66
5. RECOMMENDATIONS	67
5.1 OVERALL RECOMMENDATIONS.....	67
5.2 RECOMMENDATIONS TO THE DECISION MAKERS OF POLAND.....	68
5.3 RECOMMENDATIONS TO THE DECISION MAKERS OF THE CZECH REPUBLIC	70
6. NOMINAL INDEX.....	71
7. REFERENCES	72