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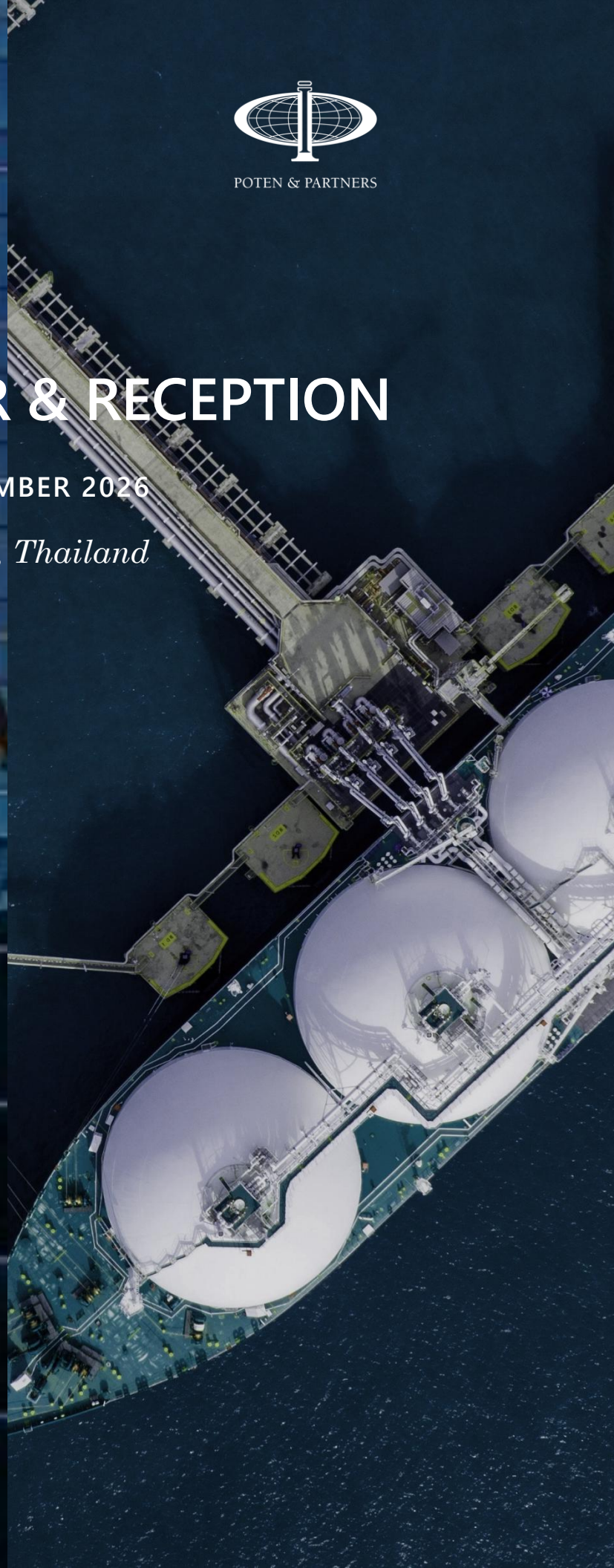


POTEN & PARTNERS

LNG SEMINAR & RECEPTION

14 SEPTEMBER 2026

Bangkok, Thailand





INTRODUCTION

This joint forum presented by Mayer Brown and Poten & Partners will focus on how LNG markets have changed post US-Iran war and how LNG buyers are dealing with supply security, disruptions, and portfolio diversity. Topics we will discuss include:

- When will the market pivot to a supply surplus following supply disruptions from the Gulf?
- Demand destruction and affordability concerns among emerging market buyers.
- Prospects for North America and global LNG projects post 2030.
- How will Europe deal with the phase out of Russian LNG? Is there a need for more European storage, import infrastructure, and pipelines?
- Force majeure cascades – the prospect of LNG disputes and arbitration post US-Iran war from major sellers, including portfolio players, declaring force majeure under LNG SPAs. How will buyers deal with their unfulfilled contracts in terms of validity of these declarations?
- Portfolio supply versus single source supply – benefits and risks amid force majeure concerns.

AGENDA

LNG IN A FRACTURED WORLD: NAVIGATING GEOPOLITICS, SUPPLY SECURITY AND THE NEW ARBITRATION LANDSCAPE

Monday, 14 September 2026 | The Athenae Hotel, Bangkok, Thailand

TIME	PROGRAM
2:15 – 3:00 P.M.	REGISTRATION AND NETWORKING <i>Venue: Pimarn Siam Hall, Level 29</i>
3:00 – 3:10 P.M.	OPENING REMARKS Nick Kouvaritakis, Global Co-head of Energy, Global Head of LNG, Partner, Singapore, Mayer Brown
3:10 – 3:50 P.M.	KEYNOTE: OVERVIEW OF MARKET AND CONTRACTING TRENDS Jason Feer, Head of Business Intelligence, Poten & Partners
3:50 – 4:30 P.M.	PANEL DISCUSSION 1: EMERGING MARKETS AND THE NEXT WAVE OF LNG INFRASTRUCTURE • Financing and infrastructure build up – FSRUs or land-based terminals for new import markets • Balancing price sensitivity against energy security for new and emerging buyers • Key challenges facing these markets and what it will take to overcome them • Which new emerging markets will experience the greatest growth in LNG imports by 2030? • Which emerging markets are positioned to drive LNG demand growth post-2030? <i>Panellists:</i> Saheera Ahmad, Head of LNG Origination East, Shell Jason Feer, Head of Business Intelligence, Poten & Partners Parth Jindal, Senior Vice President and Global Head of LNG, VTTI James Ooi, Vice President, Throughput Business, Singapore LNG (SLNG) Oliver Simpson, Executive Vice President & Chief Commercial Officer, Excelerate Energy

TIME	PROGRAM
	<i>Moderator:</i> Nick Kouvaritakis, Global Co-head of Energy, Global Head of LNG, Partner, Mayer Brown
4:30 – 4:45 P.M.	COFFEE BREAK
4:45 – 5:05 P.M.	INSIGHT SESSION: TESTING THE LIMITS – FORCE MAJEURE MITIGATION DUTIES IN LONG-TERM LNG CONTRACTS <i>Speakers:</i> Mark Harris, Senior LNG Consultant, Poten & Partners John King, Partner, Mayer Brown <i>Moderator:</i> Nick Kouvaritakis, Global Co-head of Energy, Global Head of LNG, Partner, Mayer Brown
5:05 – 5:50 P.M.	PANEL DISCUSSION 2: STRATEGIC CONSIDERATIONS AND SPA TRENDS IN A POST-WAR LNG MARKET • How has the US-Iran war reshaped force majeure declarations under LNG SPAs, with particular focus on the Middle East • Buyers' key requirements for long-term procurement in the post-war landscape – flexibility versus energy security • European sanctions on Russian LNG and impact across the market • Demand destruction – a temporary shock or a lasting shift <i>Panellists:</i> Goh Tiak Boon, Chief Commercial Officer, Singapore Gasco Nick Kouvaritakis, Global Co-head of Energy, Global Head of LNG, Partner, Mayer Brown Daisuke Mori, General Manager, LNG Origination Guillaume Servajean, Chief Commercial Officer, Global LNG, ENGIE Daisuke Shinozuka, General Manager, Tokyo Gas Douglas Wharton, Senior Vice President, LNG Marketing, Venture Global LNG <i>Moderator:</i> Jason Feer, Head of Business Intelligence, Poten & Partners
5:50 – 6:00 P.M.	CLOSING REMARKS Jason Feer, Head of Business Intelligence, Poten & Partners
6:00 P.M. ONWARDS	RECEPTION AND NETWORKING DRINKS <i>Venue: Kandhvas Place, Level 4</i>

SPEAKER PROFILES



NICK KOUVARITAKIS

Global Co-head of Energy, Global Head of LNG, Partner, Singapore | Mayer Brown

Nick Kouvaritakis is a leading energy lawyer with extensive experience advising on LNG projects and transactions globally.

As global co-head of the firm's energy practice and head of the LNG practice, Nick has led our team in advising our clients on all aspects of the LNG value chain – from LNG SPAs and TUAs, to FSRUs and LNG import projects, to LNG-to-power projects and on LNG disputes. He has been very active in the negotiation of long-term LNG SPAs having advised on more than 100 in total, and more than 30 in the past 2 years. He has advised on more than 80 FSRU projects globally and has been one of the pioneering practitioners implementing fast-track FSRU projects. He has extensive knowledge of FSRU-related matters including all aspects of FSRU charters, including bareboat, O&M and tolling variants.

Nick also has significant experience advising clients on energy and LNG M&A transactions and is one of the few top ranked lawyers (Band 1) for Energy and Natural Resources: Oil & Gas by *Chambers Asia Pacific*.



JASON FEER

Global Head of Business Intelligence | Poten & Partners

Jason Feer is the Global Head of Business Intelligence at Poten & Partners. Jason oversees a global team responsible for market analysis, industry news and trends, forecasting, publishing and data products. Prior to joining Poten in 2014, he served as COO Americas for Argus Media based in Houston starting 2011, and from 2003 through 2011 as the head of Argus' Asia Pacific business, where he was responsible for managing all of Argus' business East of the Suez Canal. In this role, he oversaw the development of new products focused on petroleum, LNG, LPG, coal, base oils, biofuels and other products. He was also responsible for developing and maintaining relationships with senior executives and government officials. With more than 25 years' experience in global energy markets, Jason has worked in Asia, Latin America, Europe and the US. His specialties include commodity markets, project development and the politics of energy.



SAHEERA AHMAD

Head of LNG Origination East | Shell

As Head of LNG Origination East at Shell, Saheera Ahmad is responsible for LNG origination and portfolio development across Asia Pacific. With over 20 years of experience in LNG trading, origination, infrastructure development, M&A and strategy, she has worked across the LNG value chain, from upstream investments and LNG import infrastructure to market development and long-term commercial agreements.

Prior to her current role, she led Shell's global Marine LNG business, advancing LNG as a lower-carbon marine fuel and supporting energy transition initiatives in the shipping sector. She brings deep expertise in developing LNG markets, infrastructure and commercial partnerships in emerging economies.



PARTH JINDAL

Senior Vice President and Global Head of LNG | VTTI

Parth Jindal serves as Senior Vice President, LNG at VTTI, where he leads the company's global LNG growth strategy and business development initiatives. With over two decades of industry experience, Parth has extensive expertise in the development of LNG terminals, FSRU projects, and the financing of large-scale energy infrastructure projects.

Before joining VTTI, Parth held leadership roles at Höegh LNG for more than ten years, helping advance LNG import infrastructure projects and contributing to the expansion of the global FSRU market.



JAMES OOI

Vice President, Throughput Business | Singapore LNG (SLNG)

Mr James Ooi is Vice President of Singapore LNG Corporation Pte Ltd (SLNG). He is responsible for SLNG's Throughput Business, which includes the berthing and unloading of LNG carriers, storage capacity management, regasification of LNG, and the send-out of regasified LNG to end users, via the Singapore Gas Grid. He also heads commercial development of SLNG's 2nd Terminal project, an offshore 5 MTPA floating storage and regasification unit (FSRU) which will enter into service by end of this decade.

James has over 28 years of experience in the energy sector. He is an expert in energy market design, asset valuation, commercial contracting for gas (LNG SPA/GSA, FSRU TCP, TUA) and power (PPA), corporate strategy, planning and operations. In addition, James brings deep operational experience and has held management leadership positions at major generators and energy utilities in the region. He has worked for and advised extensively for governments, utilities, and major Oil & Gas companies globally.

Prior to joining SLNG, James was Partner (Founder) at The Lantau Group in Singapore, and before that Managing Director of LNG and Power Consulting for IHS. He had also served as Senior Associate in Charles River Associates based across Asia Pacific. As an operator, he headed the portfolio management for one of Singapore's largest generator, YTL PowerSeraya, during which he was a nominated member of the Singapore Electricity Market's Rule Change Panel.



OLIVER SIMPSON

Executive Vice President & Chief Commercial Officer | Excelerate Energy

Oliver Simpson serves as Executive Vice President and Chief Commercial Officer, leading the commercial strategy that has been central to Excelerate Energy's evolution from an FSRU services provider into an integrated LNG and power infrastructure company. With more than two decades of LNG market experience and deep institutional knowledge developed over his tenure since joining Excelerate in 2014, he plays a pivotal role in shaping the company's commercial identity, global market presence, and long-term strategic positioning.

Oliver oversees Excelerate's commercial portfolio across regions, including long-term customer partnerships, downstream infrastructure commercialization, and LNG supply and marketing. His leadership has been instrumental in building the commercial framework that differentiates Excelerate from other FSRU owners—aligning upstream LNG supply, midstream infrastructure, and downstream gas and power solutions into a unified, integrated enterprise strategy.



MARK HARRIS

Senior LNG Consultant | Poten & Partners

Mark Harris is a Senior LNG Consultant based in Perth. He has 30 years of experience in the natural gas and LNG industry, specialising in the commercial and marketing fields. He has particular experience in long term LNG Marketing, LNG price reviews, gas trading and international transfer pricing. Mark began his career in oil and gas with Mobil in the UK North Sea, then spent six years in Kazakhstan on the Karachaganak project marketing oil and gas production. Three years as Commercial Advisor at Angola LNG, five years as GM/VP of LNG Marketing at the North West Shelf Project and four years marketing Gorgon and Wheatstone volumes for Chevron Australia has given Mark extensive experience across a broad portfolio of projects. Mark joined Poten & Partners in October 2021.

Over the past five years, he has advised clients on dozens of SPA Price Reviews, numerous arbitration proceedings, close to twenty long-term LNG procurement and marketing campaigns, and several commercial due diligence projects in relation to corporate transactions.



JOHN KING

Partner, Dubai | Mayer Brown

John King represents international energy clients, and has extensive experience across the entire upstream, midstream and downstream value chain. John is particularly recognized for his deep understanding of the LNG industry, especially LNG sale and purchase agreements (LNG SPAs), and has led several high-profile LNG developments in Asia and the Middle-East. John previously served as General Counsel for the gas operations of an IOC and a major NOC, as well as a Partner of leading law firms. He has more than 25 years of industry experience. John has been listed as a leading individual (Energy & Resources) in *Chambers Global*, *Who's Who Legal*, and *Best Lawyers*.



GOH TIAK BOON

Chief Commercial Officer | Singapore Gasco

Mr Goh Tiak Boon has extensive experience in Singapore's LNG and natural gas industry, particularly in commercial origination and business development. He has built and expanded LNG and natural gas businesses locally, establishing strong relationships with key suppliers, power generation companies, and regulators including the Maritime and Port Authority of Singapore and the Energy Market Authority.

Tiak Boon also served three terms on the Technical Committee to develop Singapore Standards for LNG bunkering and launched Singapore's first technical reference for LNG bunkering, TR56. He is recognised for his leadership in building collaborative and effective teams.



DAISUKE MORI

General Manager, LNG Origination

Daisuke Mori is a General Manager of LNG Origination of a Japanese Trading House.

Through his career of 19 years in Tokyo, Singapore and Abu Dhabi, Mori has substantial experience and high performance in LNG trading, marketing, portfolio optimization, derivatives and risk management.

Mori has been active in creating LNG deals with a wide range of contract duration from spot-short to mid-long term, backed by vital relationships and track records with market players globally.

During his secondment in ADNOC Gas, Mori contributed to project FID by securing long term commitments from the established and trustworthy customers for Ruwais Project in UAE as the Marketing Manager.



GUILLAUME SERVAJEAN

Chief Commercial Officer, Global LNG | ENGIE

Based in Singapore, Guillaume Servajean is the Chief Commercial Officer at ENGIE Energy Management SGP, specialising in Global LNG.

In this role, Guillaume oversees a diverse team of originators and structurers based in Singapore, London, Paris and Houston, and is responsible for defining commercial strategies / priorities for the LNG team.

After 10 years in investment banking, Guillaume joined ENGIE in 2014 around the time of the creation of ENGIE's energy management platform in Singapore. Guillaume participated in the restart of ENGIE's LNG activity after the strategic sale in 2018, with a focus on rebuilding origination capabilities. This led to the execution of several strategic security of supply contracts from the US during the Russian crisis, replacing lost pipeline gas contracts. ENGIE's supply book now stands at 4.5 million tonnes per annum (mtpa).

More recently the focus has been to extend the team's footprint into Asia, with two long term DES deals won last year and more developments on the horizon.



DAISUKE SHINOZUKA

General Manager | Tokyo Gas

Daisuke Shinozuka leads LNG origination, portfolio strategy, and asset optimization at Tokyo Gas. With over a decade of experience across LNG trading, origination, and portfolio management, he has worked extensively in both Singapore and Tokyo, contributing to the optimization and value creation of Tokyo Gas's global LNG portfolio.

Prior to joining the LNG business, he spent eight years in downstream gas marketing in Japan. He holds degrees in Architecture and Master of Environmental Engineering, as well as an MBA from Emory University.



DOUGLAS WHARTON

Senior Vice President, LNG Marketing | Venture Global LNG

Based out of Venture Global's headquarters in Arlington, Virginia, Doug leads the marketing of LNG from Venture Global's projects to customers in Asia Pacific, and globally.

Prior to his move back to the United States in 2024, Doug spent eight years in Singapore, during which he joined Venture Global and oversaw the growth of Venture Global's Asia business, including the setting up of Venture Global's Singapore office.

Doug has been in the energy industry for over 20 years in various commercial roles with a focus on natural gas and LNG. Prior to Venture Global, Doug worked for Cheniere in Singapore, and Chevron in the United States, United Kingdom, Venezuela and Australia. In Australia, he worked on the North West Shelf, Gorgon and Wheatstone LNG projects.

He holds a Master of International Affairs (MIA) degree from Columbia University and a Bachelor of Arts (BA) degree in Economics from Lafayette College.

FIRM PROFILES

ABOUT MAYER BROWN

Overview

The world's most sophisticated major corporations, funds, and financial institutions rely on Mayer Brown to represent them in their most important and complex transactions and disputes. With a cohesive, seamless, and integrated client-centered culture built to ensure clients achieve their goals, Mayer Brown is described by clients as exhibiting "depth of knowledge and understanding of our commercial position," and excelling "at identifying the main legal issues and providing practical solutions" to the client.

Our Global Energy Practice

Mayer Brown's Global Energy Group is a cross-office, cross-practice group dedicated to serving the global energy industry. Our team of energy lawyers, located in Dubai, Hong Kong, Houston, London, Paris, Singapore, Rio de Janeiro, São Paulo, and Tokyo, have an in-depth understanding of the risks and commercial issues unique to the industry globally, having advised clients on their oil, natural gas, LNG, energy transition and power matters for decades.

We have a long and illustrious history of representing clients in all aspects of the LNG industry. Our experience in advising on LNG import and export projects is unparalleled. We have represented host governments, the sponsors of LNG projects and the developers and users of land-based and floating liquefaction and regasification terminals in all aspects of development, financing and sale and purchase of LNG across the globe.

One Firm Culture

Our firm is seamlessly integrated across all practice groups and regions. This One Firm Culture ensures that our clients receive the best of our knowledge and experience wherever they need us.

22 OFFICES ACROSS 4 CONTINENTS

With a global reach of 22 offices across four continents, we have a diverse team of over 1,800 lawyers worldwide for all of your legal needs at your disposal. This global team is complemented by a network of partner firms in countries where we do not have a presence, with whom we cooperate on a

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This is the best team in energy with whom we have worked. Deep industry knowledge, acute commercial sense, innovative constructs, while considering the basic guardrails.

LEGAL 500 ASIA PACIFIC

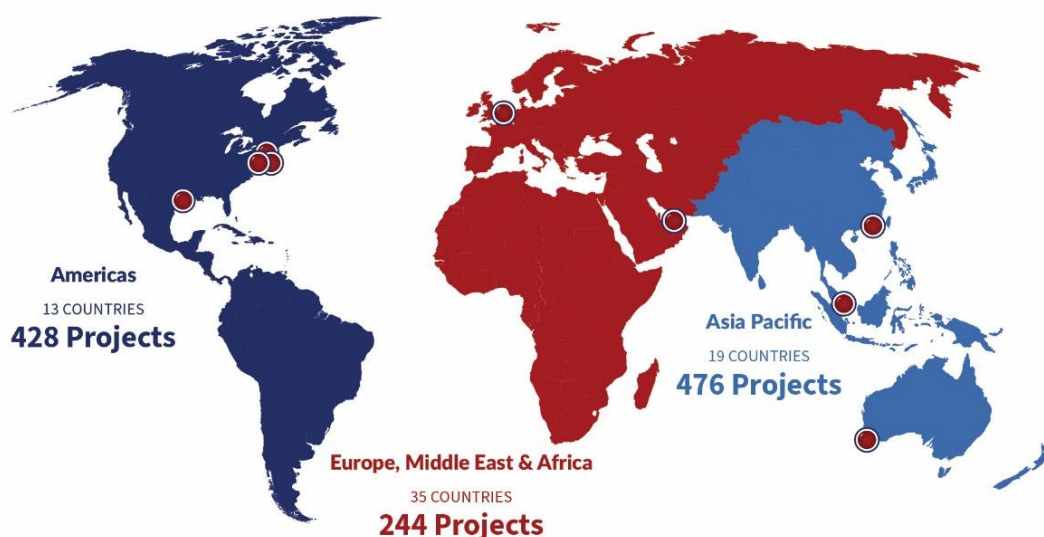
ABOUT POTEN & PARTNERS

Trusted Expertise in Uncertain Times

In a volatile LNG market, Poten provides the clarity you need to chart your course with confidence. We bring together unmatched market intelligence, strategic advisory, and global brokerage expertise to help you make informed decisions—no matter the market conditions.

Our global reach, deep multidisciplinary knowledge and full value chain experience set us apart. Whether you're evaluating investments, developing infrastructure, managing risk, or executing deals, we offer strategic support built on decades of partnering with the LNG industry.

POTEN'S GLOBAL OFFICES AND MARKET REACH



ADVISORY

- Strategy and master planning
- Feasibility studies
- Technical and commercial due diligence
- Marine and shipping
- Project development
- Marketing and procurement
- Risk management



BROKERAGE

- Chartering and S&P for LNG, LPG and tankers
- Spot and term commodity transactions
- Marine and commercial advisory
- Post-transaction support
- Decades of global market execution



BUSINESS INTELLIGENCE

- LNG market insights and proprietary data
- Contract analysis, trade flows and price forecasts
- Scenario-driven supply and demand tools
- Global analyst network providing market intelligence

Better Commercial Decisions Start with Better Information

Learn how Poten helps LNG market participants navigate complexity, manage risk, and identify opportunity.

Scan the QR code to connect with our team.



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