INTRODUCTION TO WPC

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POPULATION AND PROSPERITY DRIVES ENERGY DEMAND

- RISING GLOBAL POPULATION, ENERGY DEMAND
  - 100 = Global Primary Energy 2010
    - 200
    - 100 = Global Primary Energy 2050
    - NON-OECD
    - OECD
    - 2010
    - 2030
    - 2050

- AND CO₂ EMISSIONS
  - 100 = Global CO₂ Emissions 2010
  - 150
  - 100
  - 50
  - 0
  - 2010
  - 2030
  - 2050

SOURCE: SHELL ESTIMATES, UN
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The energy system today sets the context for the future.

<table>
<thead>
<tr>
<th>Energy Source</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Oil</td>
<td>31%</td>
</tr>
<tr>
<td>Gas</td>
<td>22%</td>
</tr>
<tr>
<td>Coal</td>
<td>29%</td>
</tr>
<tr>
<td>Biomass</td>
<td>10%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>5%</td>
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<tr>
<td>Renewables</td>
<td>3%</td>
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</tbody>
</table>

**Usage Distribution**

- **Mobility**: 20%
- **Agriculture, industry, services**: 55%
- **Residential**: 25%
ENERGY INVESTMENT FUNDAMENTALS POSITIVE

ROBUST LONGER TERM FUNDAMENTALS

Energy demand outlook in million boe/d

MANAGING SHORT-TERM VOLATILITY

$/bbl

2008 2009 2010 2011

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The World Petroleum Council is the world's premier global oil and gas forum and is the only international organization representing all aspects of the petroleum sector.

The WPC was established in 1933 with the intent to promote the management of the world's petroleum resources for the benefit of mankind.

The WPC's prime function is to catalyse and facilitate dialogue among stakeholders, both internal and external to the petroleum industry on key technical, social, environmental and management issues in order to contribute towards seeking solutions to those issues.
The World Petroleum Council includes over 60 member countries from around the world representing over 95% of global oil and gas production and consumption. WPC membership is unique as it includes both OPEC and Non-OPEC countries with representation of National Oil Companies (NOC's) as well as Independent Oil Companies (IOC's). Each country has a national committee made up from representatives of the oil and gas industry, academia and research institutions and government departments.

Every three years the Council organises the World Petroleum Congress hosted by one of its member countries. The triennial Congress is also known as the "Olympics" of the petroleum industry and covers all aspects of the industry from technological advances in upstream and downstream operations to the role of natural gas and renewables, management of the industry and its social, economic and environmental impact. In addition, outside stakeholders such as governments, other industry sectors, NGOs and international institutions have also joined in the dialogue.
WPC “THE OLYMPICS OF OIL & GAS”

Next WPC:
2014 – Moscow

Previous WPC’s:
2011 – Doha, Qatar
2008 – Madrid
2005 – Johannesburg
2002 – Rio de Janerio
2000 – Calgary
1997 – Beijing
1994 – Stavanger
1991 – Buenos Aires
1987 – Houston
1983 – London

1979 – Bucharest
1975 – Tokyo
1971 – Moscow
1963 – Frankfurt
1959 – New York City
1955 – Rome
1951 – The Hague
1937 – Paris
1933 - London
WPC 2011 was held in the newly built Qatar National Convention Center (QNCC) and hosted by Qatar Petroleum.

WPC 2011 attracted 5,200 attendants from all over the world and the exhibition had 1,200 exhibitors and 2,000 visitors (day passes).

Theme of the 20th WPC:
- Energy solutions for all, Promoting Cooperation, Innovation and Investment.
The important conclusions that emerged from the debate was that the industry is establishing a new paradigm on cooperation at all levels:

- producer-consumer dialogue rather than bickering over supply, investment and pricing;
- energy interdependence rather than the pursuit of costly and often ineffective isolationist independence;
- IOC-NOC and services company partnerships for the deployment of the massive investments and technologically challenging projects rather than the old nationalistic vs imperialistic mindsets;
- north-south and east-west market integration rather than market closure and excessive protectionism.
MUCH MORE THAN A CONFERENCE

WPC is not only a conference and a exhibition, it is also a forum where business deals are made, where innovation is shared, and the future of energy is discussed in open forums among IOCs, NOCs, service companies, governments and policy makers.
- Shell joined forces with the Dutch oil & gas suppliers organisation IRO, and secured the single largest stand at the exhibition (580 sqm) in the country section of the exhibition (centre)
- Shell had 2 keynote speakers, 6 speakers, 3 poster presenters, 3 chair or vice-chairs, and, 3 roundtable participants in the conference program
- Shell was a platinum sponsor and also sponsored signage and buses
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