Patrick Pouyanne, CEO & President of the Executive Committee, TOTAL SA

Rex Tillerson (left), Chairman & CEO, ExxonMobil and Gaurdie Banister, President & CEO, Aera Energy

Lisa Murkowski, Chairman, US Senate Energy and Natural Resources Committee

Robert Dudley, Group Chief Executive, BP

Eldar Saetre, President & CEO, Statoil

Vagit Alekperov, President, OAO LUKOIL

Patrick Pouyanne, CEO & President of the Executive Committee, TOTAL SA

Daniel Yergin (left), IHS Energy CERAWeek Chairman with Henry Paulson, Former US Secretary of the Treasury

(L to R) Stephen Chazen, President & CEO, Occidental Petroleum; Ryan Lance, Chairman & CEO, ConocoPhillips; and Shaikh Nawaf Al-Sabah, Chief Executive Officer, Kuwait Foreign Petroleum Exploration Company
“Leading industry names...gathered at what has been described as the Super Bowl of energy events, or one of the most important energy events in the world.”

– National Journal
Greg Boyce, Chairman & Chief Executive Officer, Peabody Energy; and Gina McCarthy, Administrator, US Environmental Protection Agency

Walter Isaacson, President & CEO, The Aspen Institute

Ian Macfarlane, Minister for Industry and Science, Australia

Leo Denault, Chairman of the Board & CEO, Entergy Corporation

Charif Souki, Chairman & CEO, Cheniere Energy

Jean-Pascal Tricoire, Chairman & CEO, Schneider Electric

Thad Hill, President & CEO, Calpine Corporation

Pat Vincent-Collawn, Chairman, President & CEO, PNM Resources

Enrique Ochoa Reza, Director-General of the Mexican Federal Electricity Commission (CFE)

Walter Isaacson, President & CEO, The Aspen Institute

Ian Macfarlane, Minister for Industry and Science, Australia
“Turning Point: Energy’s New World” was the theme of the 34th IHS CERAWEK. The Executive Conference convened at a moment of profound turbulence and change for the global energy communities. CERAWEK addressed the shifts occurring throughout the oil, gas and power industries – and what the new reality means for markets, industry structure, investment, costs, environment, operations and strategy. CERAWEK speakers shared their perspectives on leading through the cycle. The conference culminated with a look at “Energy’s Grand Challenges” – sustaining technology innovation, cyber-security, emerging infrastructure risks, and geopolitical hot spots.

CERAWEK annually convenes leaders from the global energy community to offer a comprehensive and integrated global framework for understanding what’s ahead. Our goal at CERAWEK is to offer integrated, global dialogue and insight into the energy future. We aim to provide new ideas and a comprehensive understanding of the rapidly changing landscape – and the implications for strategy, investment and leadership.

The event includes public and private sessions, with contributions from senior executives and officials, thought leaders, NGOs, and IHS experts from across the energy spectrum and from the policy world and the financial, tech, and industrial communities. The event fosters dialogue among participants consisting of over 2,800 delegates from over 60 countries.
Managing Through Turbulence

IHS Energy CERAWEek, the premier global energy conference, opened on April 20, 2015 with a focus on “Managing through Turbulence.” Topics encompassed the Iran nuclear deal; the economics of the oil price drop; innovation in a down cycle; and US energy export policies. Speakers addressed changing geopolitics, leadership, strategies and technology challenges, along with the impacts of economic sanctions on the Russian energy industry.

Future US Energy Policy

Senator Lisa Murkowski and Ryan Lance delivered the opening conference keynote dialogue, chaired by IHS Vice Chairman Daniel Yergin. Both emphasized the need for lifting the ban on crude oil exports. Senator Murkowski pointedly asked why lift sanctions on Iranian oil but retain “sanctions” in the form of the ban on US oil?

“... yet another outstanding CERAWEek ... it truly is an opportunity for great collaboration, great networking, great thought.”

– Senator Lisa Murkowski

Sustaining Innovation Through the Cycle

How to maintain innovation in the current environment of reduced revenues and shrinking budgets driven by the downturn in energy prices? Steve Bolze

Conference Review 2015 • 4 • IHS Energy CERAWEek
discussed how innovation must be bolder, faster, and smarter during the downturn. Muhammad Al-Saggaf emphasized the central importance of innovation for companies to remain industry leaders. Shaikh Nawaf Al-Sabah summarized his view on whether to sustain research on innovation by quoting former UK Prime Minister Margaret Thatcher during the Gulf War crisis: “Now is no time to go wobbly.”

An Iran Nuclear Deal: Prospects for Middle East and the World

William Burns, who as US Deputy Secretary of State played a key role in the negotiations with Iran, and Carlos Pascual outlined the Iranian nuclear deal and discussed both its elements and the regional and global impact.
Managing Through Turbulence

The Future of North American Energy

Stephen Chazen said that the Permian Basin, with enormous potential for oil production, will continue to be a key focus for the company. Mr. Chazen noted that the dynamics of the current oil cycle are different from past cycles, when the oil industry was shut out of capital markets. In the current cycle, bond and stock markets remain open, which, because of greater capital availability and fewer strictures, could make the down cycle last.

Global Energy Dialogue

Vagit Alekperov pointed to the current low oil price as an opportunity for industry wide evolution operationally as well as a driving force behind decreased resource nationalism. He also discussed the effect of current international sanctions on the Russian oil industry, Lukoil’s strategy, and Russia’s large shale oil potential.

US Policy Dialogue

Sally Jewell identified goals for the remainder of President Barack Obama’s term, and the department’s activities on Arctic development, hydraulic fracturing on public lands, and sustainability. Secretary Jewell emphasized the need to balance resource accessibility and sustainability, and noted the unique challenges of working in the federal government.
Opening Keynote

Rex Tillerson opened CERAWeek’s Oil Day with remarks about the US energy transformation and the need for US government policies to facilitate continued oil and natural gas investment in order to ensure US energy security. He called for greater regulatory clarity and improved decision-making, approval of the Keystone XL pipeline, and promotion of free trade of US oil and natural gas. In discussion, Mr. Tillerson said that the lower oil price environment “will be with us a for a while,” but added that the US oil and natural gas industry is nonetheless “resilient” and “responds best under pressure.”

“I appreciate the influence and the impact that CERAWEK has in our industry.” — Rex Tillerson

Oil Keynote

Patrick Pouyanné, TOTAL SA CEO & President of the Executive Committee

Patrick Pouyanné, TOTAL SA CEO & President of the Executive Committee

Patrick Pouyanné welcomed for the oil keynote. His discussion centered on the impact of the oil price drop on TOTAL and the industry and the effect of geopolitics on TOTAL’s activities in various countries. Mr. Pouyanné sees the low price environment as an opportunity for the industry to be more efficient and reduce costs. TOTAL’s activities globally will continue despite a difficult geopolitical environment. He commented that solutions for climate change will include greater use of natural gas and solar energy.
Keynote

Robert Dudley opened with a description of the operational and cultural changes that BP has undergone since the Deepwater Horizon tragedy. That was followed by a wide-ranging discussion on the implications of low oil prices, Russian sanctions, and the future role of oil in the world’s energy mix. Mr. Dudley pointed to the resiliency of US production, despite falling activity levels, and the pressures this would place on future oil prices.

Global Oil Plenary

Miguel Matías Galuccio and Emilio Lozoya Austin discussed their companies’ strategies, challenges, and opportunities. Mr. Lozoya said that limited cash flow from declining production was PEMEX’s current challenge, but emphasized the determination to keep energy reforms on track. A major objective is for PEMEX to become an “agile” company that will maximize the economic value of its assets through strategic partnerships and its new corporate structure. Mr. Galuccio discussed the transformation at YPF during his three-year tenure, including its progress in revitalizing mature production, and opening up offshore exploration. A major focus is to develop Argentina’s large shale oil resource.

“As we all know, this conference is always one of the highlights of the year for our industry. It’s a great gathering of the industry.”

— Robert Dudley

Robert Dudley, Group Chief Executive, BP

Miguel Matías Galuccio, CEO, YPF

Emilio Lozoya Austin, CEO, Petróleos Mexicanos (PEMEX)
Keynote: Leadership Insights

**Eldar Sætre** set out a double objective for the oil industry – lower costs and lower carbon. These, he said, were interlinked and fundamental to the sustainability of the industry. On the cost side, he stressed the necessity of pushing toward standardization, noting early success Statoil has had offshore Norway. On carbon emissions, Mr. Sætre said the industry must work hard to be viewed as part of the solution, rather than part of the problem. He also provided an update on the company’s operations offshore Norway and onshore US.

Ministerial Dialogue

**Tomás González Estrada** highlighted the energy industry’s creation of jobs and importance for funding public infrastructure over the past two decades – now challenged by low prices. He emphasized that Colombia will continue to deploy economic and regulatory tools to attract sufficient investment.

Plenary: Is North America The New Swing Producer in World Oil?

IHS experts **Roger Diwan**, **Raoul LeBlanc**, **Bhushan Bahree**, and **Atul Arya** offered insight into the future of the tight oil revolution, which has made the United States the number one source of growth in world crude oil supply since 2008—by far. The US is becoming the new “swing supplier” owing to the responsiveness of its oil production to changes in the market. The new “US Swing Era” will impact investment, production, OPEC decision-making, and the future of world oil.
Upstream Plenary

The Upstream Plenary brought together the leaders of three of the companies at the forefront of the shale revolution in the United States – Harold Hamm, John Hess, and Scott Sheffield, along with Peter Jackson. Chaired by Daniel Yergin, the panelists agreed that the time has come to lift US crude oil export ban to help sustain production amidst lower prices. They discussed strategies for managing cost reductions in the current low price environment while maintaining capabilities, how high shale production could go and how long the growth will last, and the transfer of unconventional technology to the exploitation of conventional plays.

Oil Market and Downstream Plenary

Gary Heminger, Greg Armstrong, Jack Gerard, and Adam Sieminski, Administrator for the US Energy Information Administration discussed the resurgence of the US petroleum industry and its impact on refining and transportation, the changing character of the oil market, and the challenges going forward.
Keynote

Henry Paulson, former US Secretary of Treasury and author of the new book *Dealing with China: An Insider Unmasks the New Economic Superpower*, engaged in a wide-ranging discussion with Daniel Yergin on the challenges facing China as its global role continues to expand, and on the complex balance of US and China relations. He highlighted President Xi Jinping’s reform program, the crackdown on corruption, property rights, the need to strengthen rule of law, and promotion of greater competition and efficiency in China’s economy. Asked by Dr. Yergin about the lessons from the financial crisis of 2008. Secretary Paulson noted the central importance of “acting decisively and quickly and then correcting mistakes as you go along.”

“I’ve heard about this conference ... but being here is amazing: just the people and the energy in the room...”

— Henry Paulson
In the Gas Day keynote dialogue, Claudio Descalzi addressed the current impact of low oil prices on gas markets and gas’ robust role longer term, helped by the push toward cleaner fossil fuels globally. He emphasized the need for supply diversification for energy security and spoke of Eni’s pipeline of opportunities around the world. Africa may become a much bigger player in global gas and a major supplier to Europe.

**Global Gas Plenary**

Andrew Brown, Charif Souki, Hirobumi Kawano, and Volodymyr Demchyshyn agreed that the global outlook for gas consumption is strong and that natural gas is an important part of the answer to the challenge of climate change. The discussion focused on future trends of global gas, in particular the future of LNG, oil-linked gas contracts, and a need for a new gas pricing model.

*Claudio Descalzi, CEO, Eni*
A key topic was the speed and scale of the upcoming US LNG exports and their competitive impact on the global market. Minister Demchyshyn discussed Ukraine’s gas storage and transit system and its new integration with the European gas supply system.

**Keynote**

Richard Kinder recounted the early days of the company and its expansion from only 2,000 miles of pipeline to about 84,000 miles today – accounting for a third of total US infrastructure. Mr. Kinder stressed that pipeline development was still catching up to the growth of new oil and natural gas supply. He expressed disappointment about the slow regulatory response to permitting for the required infrastructure. He also discussed Canada’s need for expanded pipeline infrastructure to the west coast.

“...long-term pipeline contracts are increasingly driven by a “demand pull” rather than a “supply push.””

— Richard Kinder

Richard Kinder, Chairman & CEO, Kinder Morgan
Energy Leader
Insight Dialogue

Joe Kaeser offered strategic perspectives on Siemens global business, including cost cutting in the oil and natural gas industries, the integration of Siemens most recent acquisitions in the oil and gas sector, and the challenges of, conducting business within Europe and with Russia. He also discussed technology opportunities including the application of automation and electrification to the oil and gas industry.

Ministerial Dialogue

Ian Macfarlane highlighted the strong cooperation between Australia and the United States and the nations’ shared commitment to global security of supply. Minister Macfarlane said that Australia’s natural gas market has been transformed. Capitalizing on the benefits reaped from the recent extensive gas market investment, Minister MacFarlane said that Australia is focusing on establishing the environment to sustain the next wave of development.

“I[Australia] will become one of the world’s largest exporters by 2018–19.”

– Ian Macfarlane
International Gas: Building High Value Demand

Shigeru Muraki, Sarwjit Sambhi, and Andy Barrett offered insight on the future of gas from a variety of perspectives -- the future of Japan’s energy market, the European energy picture, global gas supply and demand dynamics, and the need to leverage gas’ advantages and energy supply diversification to strengthen global gas demand.

North American Natural Gas: Rediscovering Gas

Steve Mueller, Al Monaco, Michael Smith, and Robert Ineson addressed the ways, new and old, in which the industry is working to capture value from natural gas. The United States enjoys competitive advantages that will facilitate a large build-out of LNG export capacity. Greater regulatory and permitting certainty is needed in order to eliminate regional price disparities and reduce volatility—an outcome that would benefit players across the value chain.
A unique Plenary brought together the three energy ministers of North America – Ernest Moniz, Pedro Joaquín Coldwell, and Greg Rickford in a panel chaired by Daniel Yergin. The ministers made clear their determination to deepen existing energy cooperation.

This included expansion and integration of infrastructure such as pipelines and electrical grids, the harmonization of regulations of the energy industry and increased technology transfer, and a common commitment to climate goals.
North American Power CEO Dialogue

Thad Hill, Leo Denault, and Pat Vincent-Collawn joined IHS Chief Power Strategist Lawrence Makovich in the CEO dialogue. Discussion focused on reactions to the US Environmental Protection Agency’s Clean Power Plan; electricity load growth on the US Gulf Coast and the rest of the country and the drivers behind it; the challenges associated with rooftop photovoltaic market penetration; and the response to current policy regulations and power market uncertainty.

The Future of Mexican Power

Enrique Ochoa Reza described the profound transformation of Mexico’s power industry. He outlined main goals: to decrease the use of high-cost fuel oil and replace it with natural gas; to promote the development of renewables to reduce negative impacts on the climate; and to decrease the technical and nontechnical losses associated with power transmission and distribution.
Keynote

Gina McCarthy, described EPA’s proposed Clean Power Plan (CPP) to reduce carbon emissions from the power sector. The United States is already headed toward a low carbon future and the CPP will accelerate that progress. Responding to concerns about CPP costs, she said the investments in energy efficiency and transmission needed to meet the CPP requirements are already happening and that the rule will merely accelerate them. She noted that the rule will generate billions of dollars in benefits through reductions in particulate matter, which causes asthma and other respiratory illnesses. She stated that she will not accept a rule that jeopardizes the reliability of the US electric grid.

The Future of Global Coal

Greg Boyce and Ernie Thrasher observed that coal is still the world’s fastest growing fuel but noted that coal’s center of gravity continues to shift eastward to Asia. They agreed that a diversified fuel slate is best for the global energy mix, and discussed how to increase technological innovation in the coal industry.
Evolving Power Business Models: a Global Perspective

Robert Flexon, Jean-Pascal Tricoire, and James Hughes focused on how power company business models are changing, including the value chain, products, customers, capabilities, and how firms capture value.

Innovation and Technology in Electric Power

Lisa Davis, Thomas Siebel, and John Woolard discussed the role of individual companies and the power grid in encouraging the innovation of technology for electric power. To spur innovation, the power grid will have to be more dynamic and the regulatory constraints removed. Jone-Lin Wang highlighted that the power grid in the US Eastern Interconnection is the biggest machine on earth, syncing together generators, transmission lines, and millions of households.
Climate Change Policy Plenary: Paris in December and What’s Ahead

Rachel Kyte, Stephen Lovegrove, Todd Stern, and Carlos Pascual (Chair) stressed the significance of the 2014 US-China climate agreement. They predicted a significant outcome from the upcoming 21st session of the Conference of the Parties in Paris in December 2015. The panelists stressed that a low-carbon future does not need to hinder economic growth. Rather, they emphasized the importance of creating proper commercial incentives. Increasing energy access in developing countries is paramount, but the challenge is for it to be done on a sustainable basis.
Keynote

General Keith Alexander (retired) discussed his recommendations for protecting companies and the government against cyberterrorism. He identified three types of threats to companies: the theft of intellectual property, which he considers the greatest transfer of wealth; criminal activity for profit, such as recent stealing of personal data from major retailers; and attacks on government entities or on international organizations such as the World Bank. Better information sharing is needed between companies on cyber threats, including liability protection for those that share information.

“...the theft of intellectual property, which [is] the greatest transfer of wealth...”
— General Keith Alexander

General Keith Alexander (retired), former Director of the National Security Agency and Commander, US Cyber Command
John Grossenbacher, Suzanne Spaulding, Jerald Sussman, and Daniel Poneman agreed that cybersecurity threats are becoming more sophisticated and that electric grids are a key target for hackers. Companies need to identify and assess these risks and implement systems to respond to such threats. Industry will need to show strong leadership in this process, and the government will need to work collaboratively with the private sector.

Geopolitical Hotspots and Drivers of Change

Leading experts Nicholas Eberstadt, James Clad, Angela Stent, and Raad Alkadiri, addressed the world’s hotspots including the Middle East, India, China, and Russia, both in relation to and independent of US policy.
The View from MIT

Five professors from the Massachusetts Institute of Technology (MIT): Donald Sadoway, Robert Armstrong, Kripa Varanasi, and Dennis Whyte joined chair Daniel Yergin to discuss game-changing technologies on the horizon and the impact these technologies will have on the future of energy. Four key pathways include electrical chemical pathways; the internet of things; online learning; surfaces, interfaces and coatings; and nuclear fusion. Others discussed included new superconductors, 3D printing, and molten salt blankets.
CERAWEek 2015 closed with a keynote dialogue with Walter Isaacson, author of *The Innovators: How a Group of Hackers, Geniuses, and Geeks Created the Digital Revolution; Steve Jobs; and Albert Einstein*. In a wide-ranging and forward-looking discussion, Isaacson discussed the sources of creativity and innovation, the importance of collaboration, individuals versus groups, and the optimistic implications for the energy future.
IHS Energy CERAWeek By the Numbers

- **2,800+** delegates, including senior managers, governmental officials, and thought leaders
- **815+** organizations representing over **60** countries
- **300+** speakers on energy, strategy, markets, finance, economics, geopolitics, and technology innovation

“...IHS CERAWeek is recognized as one of the largest and broadest energy conferences....CERAWeek brings together energy industry insiders, lawmakers and government officials, analysts and reporters and more from across the US (and beyond)...”

– Platts
Insight Dinners offered relaxed and informal interaction on timely themes. Distinguished officials and experts provided opening comments, followed by moderated discussion among dinner participants.

**Insight Dinners included:**

- Russian-Western Relations in a Time of Uncertainty
- Asia: Still the Promised Land for New Energy Investment?
- Securing Energy Infrastructure: Risks and Emerging Responses
- Sustainability in a World of Low Oil Prices
- Sustaining Human Capital Through the Cycle: Learning from the Past, Building for the Future
- Conversation with Ernest Moniz, US Secretary of Energy

![Jin Yong Cai, EVP & CEO, International Finance Corporation](Image 1)

![Daniel Sullivan, US Senator, Alaska](Image 2)

![Jerre Stead, Chairman & CEO, IHS](Image 3)
Fossil Fuel Divestment and the “Carbon Bubble” Insight Dinner

Jane Mendillo, President & CEO, Harvard Management Company (2008-14)

Maria Zuber, Vice President for Research, MIT

Antonia Bullard, Vice President, IHS Energy

- The Fossil Fuel Divestment Movement and the “Carbon Bubble”
- Canada’s Role in the Rising North America Energy Powerhouse
- The “Great Divergence”: What’s Ahead for the Global Economy?
- Methane Emissions from Oil and Gas: What Can the Industry Do to Build Public Trust?
Strategic Dialogues featured presentations by industry leaders on a range of timely topics, followed by interactive discussion. Sessions included:

**OIL**
- Downstream Strategies in a Low Price Environment
- Russian Oil After Sanctions and the Price Collapse: Can Mature Field Redevelopment Offset the Planned Expansion in Sanctioned Plays?
- New Tricks for Oil Fields
- Opening Doors to Investment: Mexico’s Bidding Round One
- Future of Upstream Costs
- Future of the Canadian Oil Sands
- African E&P: Will Major Discoveries Be Successfully Developed?
- Business Models for International Oil Companies: New Strategic Directions
- The Future of the Arctic
- Future of Refining in an Interconnected Global Market
- North American E&P: Imagining the Next Upcycle
- Capital Markets and the Financing of Upstream Investment in a Low Price Environment
- Oil Logistics and Midstream: Capturing New Opportunities
- Operational Excellence in a Shifting Oil Market Environment
- National Oil Company (NOC) Response to a Low Commodity Price Environment: Differentiated Objectives, Differentiated Actions
- Middle East: Turmoil or Stability
- The New Math for Oil: Global Oil Market Outlook

**NATURAL GAS**
- Russian Gas: East or West?
- Asia Gas and Power Markets: Searching for the Balanced Approach
- Low Energy Prices: Opportunity or Challenge for the Global LNG Industry?
- Latin America’s Gas Markets at a Global Inflection Point – What’s Ahead?
- A New Model for Unconventional Gas?
- The Elephant in the Room? The Marcellus, the Utica and the Natural Gas Market
- The Impact of Oil Prices on North American Unconventional Operations
- Gas Monetization in Africa: What Will it Take to Compete?
- Global LNG: New Business Models and Commercial Structures
- Gas Price Reform: Balancing Producer and Consumer Needs
- Gas and Coal in a Changing Energy Mix
- Financing Gas and LNG Through the Cycle
- North American Gas: Demand Side Responses to Low Prices
- Mega Projects – Is Price Relief Finally on the Way?
- Leveraging Operational Excellence to Drive Margin Expansion
- Will Alternative Fuels and Vehicles Survive Low Oil Prices?
- Energy and Petrochemicals at the Interface
Strategic Dialogues

**POWER**

- Mexico’s Power Sector Evolution
- Operational Excellence for Utilities
- African Power: Heating Up?
- Texas Power – Leading Through Uncertainty
- Tackling Rising Environmental Challenges in China: The Role of Electric Power
- The Future of Solar
- Investments in Power Infrastructure

- Addressing the Missing Money Problem: Recent Developments in Cost Recovery Efforts
- Renewables in a World of Volatility
- Industry Evolution Continues: How Are Policy Pressures Reshaping the US Power Utility Sector?
- Future of Baseload Generation
- Europe’s Power Industry: Mapping Moving Landscapes
- Coal’s Role in Emerging Markets
- Challenges and Opportunities for the Power Grid: Evolution of T&D

Francisco Diez de Sollano, Chairman, Energy Regulatory Commission, “Mexico’s Power Sector Evolution” dialogue

Ernie Thrasher, CEO, Xcoal & XLNG Energy & Resources, “The Marcellus, the Utica and the Natural Gas Market” dialogue


Ibraheem Assa’adan, Executive Director, Exploration, Saudi Aramco, “A New Model for Unconventional Gas?” dialogue

Alex Klein (Chair), Senior Director, Renewable Power Advisory Services, IHS; Anne McEntee, President & CEO, Renewables, GE Power & Water; Tejpreet Singh Chopra, President & CEO, Bharat Light & Power India Pvt. Ltd.; Ilya Hartman, North American President & CEO, Acciona Energia; and Francis O’Sullivan, Director of Research, MIT, discuss “Renewables in a World of Volatility.”
IHS Expert Briefings provide insights on a particular topic by IHS analysts followed by interactive discussion.

**OIL & GAS**

- License to Operate and Public BackLash: Shaping Public Attitudes Towards Energy Development
- US Crude Oil Exports: Impact of Shifting Oil Market Conditions
- Can China Rebalance the Global Oil Market?
- $30 a Barrel – or a $130: IHS Global Scenarios
- Outlook for Natural Gas Liquids: Impacts from Changes in the Oil Market
- The Future of Conventional Exploration
- Petrochemical Feedstocks: A New Refining Epicenter
- The Future of E&P Equipment Markets: Supplier Risk and Strategies for Mitigation
- Latin America E&P: Execution Challenges
- How Long Will North American Sweet Spots Last?
- Capital Strategies in E&P
- Is a Peak in Global Transport Fuel Demand on the Horizon?
- Future E&P Portfolios and Strategies
IHS Expert Briefings

GAS & POWER

- Gas or Coal in Asia’s Future Power Generation?
- North American Power Industry: In the Midst of a Fundamental Transformation
- The New Commodity Price Environment – Implications for the European Power Industry
- FSU Power Developments: Where Next for Russia, Ukraine, and Kazakhstan’s Electric Power Sectors?
- Middle East and North African Power Trends
- Latin American Gas & Power Trends
- Power Generation Equipment Cost Trends
- North American Power Scenarios: Insights on Risk and Opportunity
- Fuel Prices: An IHS Perspective
- Energy Infrastructure Security: Managing Exposures from Cyber Threats and Violent Risks
Steve Bolze, President & CEO, GE Power & Water
Lisa Murkowski, Chairman, US Senate Energy and Natural Resources Committee
“This is the place to be, if it is about oil and gas.”
– Joe Kaeser, President & CEO, Siemens AG

Joe Kaeser, President & CEO, Siemens AG
Eric Spiegel, President & CEO, Siemens, USA
Energy Innovation Pioneers

CERAWeek 2015 celebrated the 10th anniversary of the Innovation Pioneers. This program recognizes companies whose technologies and businesses exemplify innovation, creativity, feasibility and timeliness, scalability and quality of management. The Pioneers represent successful entrepreneurs who contribute to the CERAWeek community – and who are developing future pathways for the industry. Past Energy Innovation Pioneers have achieved remarkable success including IPO’s or strategic acquisition.

2015 Innovation Pioneers

AC Kinetics – Neil Singer, President & CTO
Alevo – Jostein Eikeland, Chairman & CEO
Alphabet Energy – Matthew Scullin, Founder & CEO
Bidgely – Abhay Gupta, Founder & CEO
Fishbones AS – Eirik Renli, CEO
Hunt Advanced Drilling Technologies LLC – Todd Benson, CTO
Gridco Systems – Naimish Patel, CEO
Kurion – William Gallo, CEO
Liqiglide – Dave Smith, CEO
Nuscale Power – Jose Reyes, CTO
Petroleum Technology – Sergey Shumilin, CEO
Veolia – Bruce Bishop, VP & General Manager, CeraMem
Veros Systems – Jim Dechman, President & CEO
Woods Hole Center for Marine Robotics Technology – Andy Bowen, Principal Engineer
Wearable Intelligence – Yan-David Erlich, CEO
Zahroof Valves Inc. – Tony Gioffredi, CEO

CERAWeek 2015 Alumni Presenters

Acumetrics – Gary Simon, CEO
Alert Enterprise – Jasvir Gill, CEO
Liquid Robotics Oil & Gas – Gary Gysin, President & CEO
NetPower – Bill Brown, CEO
Gradiant Corporation – Anurag Bajpayee, CEO
Rebellion Photonics – Allison Lam Sawyer, CEO

Kristian Bodek, Director, Energy, IHS, Head of the Energy Innovation Pioneers Program
Future Energy Leaders

This program brings to CERAWEek promising professionals chosen by virtue of their high potential as future leaders of the industry. Future Energy Leaders form a unique community. They benefit from dedicated pre-conference classes as well as engagement in activities and sessions throughout CERAWEek.

Jack Gerard, CEO, API (third from left), and Daniel Yergin (center) in discussion with emerging energy leaders.
IHS Energy CERAWEek Partnership & Membership Programs

**Leadership Circle**
The Leadership Circle offers Partners and Members intimate dialogue and focused, highly interactive, off-the-record discussion on key issues shaping the energy future.

- Independents
- Downstream
- Coal
- Technology & Innovation
- Global Power
- Upstream Oil & Gas
- Global Gas

**Energy Partner Informal Conversations – EPIC**
Held throughout the week, these informal roundtables bring together Ministers and top officials with CERAWEek partners and members for relaxed, intimate “Chatham House” style discussions.

**Partner Receptions**
Partners host Private Partner receptions in their on-site hospitality suites.
IHS Energy CERAWEek
Media Coverage & Impact

IHS CERAWEek generates broad news coverage in the US and international media.

- **3,700+** media mentions
- **140+ billion** impressions across **86** countries
- **120 minutes** of live coverage provided by CNBC

- **2,500+** news articles
- **70 million** in social media audience reach
- **250** accredited journalists representing top global media

“...Judging by the CEO-suite and Minister density, this event is only comparable to the World Economic Forum in Davos.”

– Frankfurter Allgemeine Zeitung

“The biggest energy conference in the country, if not the world”

– PBS Inside Energy

“For a week each year, a hotel in Houston, Texas becomes the center of the world of energy. Executives from around the globe as well as top government officials descend on the city for the annual IHS CERAWEek conference.”

– Inside Energy CNBC
Strategic Partners

ANH
AGENCIA NACIONAL DE HIDROCARBUROS
COLOMBIA

energy
AMERICAN PETROLEUM INSTITUTE

bp

CHENIERE

ConocoPhillips

ERM

ExxonMobil

GE

Honeywell

A Honeywell Company

SIEMENS

Statoil

Vinson & Elkins LLP

YPF

Foundational Partner

Xcoal
ENERGY & RESOURCES

XLNG
ENERGY & RESOURCES
Industry Partners

Media Partner

THE WALL STREET JOURNAL.
<table>
<thead>
<tr>
<th>OFFICIALS</th>
<th>EXECUTIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Keith Alexander</td>
<td>Vagit Alekperov</td>
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<td>Director, US NSA Commander US Cyber Command</td>
<td>President, Lukoil</td>
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<td>Pedro Joaquin Coldwell</td>
<td>Greg Armstrong</td>
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<td>Secretary of Energy, Mexico</td>
<td>Chairman &amp; CEO, Plains All American</td>
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<td>Tomas Gonzalez Estrada</td>
<td>Greg Boyce</td>
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<td>Minister of Energy, Colombia</td>
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<td>Colette Honorable</td>
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<td>Sally Jewell</td>
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<td>US Secretary of the Interior</td>
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<td>Ian Macfarlane</td>
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<td>Walter Isaacson</td>
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<td>Author, The Innovators &amp; Steve Jobs</td>
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Igor Sechin, President & Chairman of Management Board, Rosneft
Daniel Yergin moderates session with Henry Kissinger, Former US Secretary of State

Daniel Yergin moderates session with Henry Kissinger, Former US Secretary of State
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IHS Energy CERAWEek 2016 moves to February.

Date:
February 22-26, 2016

Place:
Hilton Americas, Houston, Texas
2016: Save the Date

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