Drivers of Change:
Geopolitics, Markets, and the New Map of Energy
MISSION STATEMENT

CERAWeek® 2013—IHS CERA’s 32nd annual executive conference—was held at the Hilton Americas in Houston, Texas, on March 4-8, 2013. Our theme—“Drivers of Change: Geopolitics, Markets, and the New Map of Energy”—addressed a range of topics from the disruptions of Hurricane Sandy, the Shale Gas abundance, new discoveries in Africa, to the emerging cyber threats facing companies and countries.

CERAWeek® annually offers a comprehensive and integrated global framework for understanding what’s ahead on the energy landscape—markets, technology, geopolitics, environment—and the implications for strategy, investment and leadership. It provides a combination of presentations by senior energy officials, thought leaders and IHS CERA experts from across the energy spectrum and the globe.

We also foster interactive discussion and dialogue among participants, over 2,000 senior executives, officials and experts from over fifty countries.
Welcome & Opening Keynote
Khalid Al-Falih, President & CEO, Saudi Aramco

Keynotes
Ryan Lance, Chairman & CEO, ConocoPhillips
Fanrong Li, CEO & President, CNOOC Ltd.

Global Oil Plenary
Orlando Cabrales Segovia, President, ANH
Steve Williams, President & CEO, Suncor Energy
Concurrent Plenaries

Strategy Sessions
New Innovation Strategies to Transform the Energy Future
Will the Unconventional Revolution be a Global One?
Middle East: Frontlines and Fault Lines
Driving Operational Excellence: Lessons of the Past and Emerging Best Practices
Natural Gas vs. Diesel in Transportation: Will the US and China Pave the Way?
Financing the Changing Capital Expenditure Patterns
The New Logistics of North American Oil: Economics, Markets, and Politics

Upstream
Peter Jackson (Chair), VP Upstream Research, IHS
Clarence Cazalot, Jr, Chairman, President & CEO, Marathon Oil
Tim Dodson, EVP Global Exploration, Statoil
J. Michael Yeager, Chief Executive, BHP Billiton Petroleum

Downstream
Jacek Krawiec, President & CEO, PKN Orlen S.A.
Stephen Pryor, President, ExxonMobil Chemical Company
Philip Rinaldi, Chief Executive Officer, Philadelphia Energy Solutions
James Burkhard (Chair), VP & Head of Oil Market Research & Scenarios, IHS

Keynote
Walter Isaacson, Author Steve Jobs and Einstein, President Aspen Institute

(L to R) Daniel Poneman, US Deputy Secretary of Energy, Daniel Yergin, Walter Isaacson
Now in its 8th year, the IHS CERAWeek® Innovation Pioneers program featured 21 promising energy technology companies, and presentations by each company’s CEO.
Opening Keynote

Bob Dudley,
Group Chief Executive,
BP

Strategy Sessions

Understanding and Managing Community Impacts of Unconventional Oil and Gas Development

The Future of Global LNG: The Changing Face of Natural Gas Markets and Pricing

New Frontiers, New Business Models: Resource Holders, Oil Companies and Service Providers

Capturing the Spread: Turning North American Natural Gas into Higher-value Products

Financing Gas in an Uncertain Economy

Europe’s Future Natural Gas Markets and Suppliers

Competing for Talent in Emerging Hotspots: Building Staff to Operate in Energy Frontiers

Global Gas Plenary

Michael Stoppard (Chair),
Managing Director,
Global Gas, IHS

Peter Coleman, CEO
& Managing Director,
Woodside Energy

Rainer Seele, Chairman of the Board of Executive Directors, Wintershall Holding GmbH

Joseph Geagea,
President, Chevron Gas and Midstream

Philippe Sauquet,
President, Gas & Power, Total
Keynote Address
Daniel F. Akerson, Chairman & CEO, General Motors

Special Address
Igor Sechin, President and Chairman of Management Board, Rosneft

Keynote Address
Joe Oliver, Minister of Natural Resources, Canada
Energy and Global Competitiveness Plenary

David Hobbs (Chair), Senior Associate, IHS; Head of Research, KAPSARC
Chris Weston, President & CEO, Direct Energy
Patrick Kron, Chairman & CEO, Alstom
Hirobumi Kawano, President, Japan Oil, Gas and Metals National Corporation (JOGMEC)
Daniel Yergin (Chair), Vice Chairman, IHS

Special Program — IHS CERAWeek Expert Dialogue
Drivers of Change: Geopolitics, Markets, and the New Map of Global Energy

L to R: Alex Klein, Research Director, Clean and Renewable Power
Bill Sanderson, VP Downstream Research
Mary Barcella, Director, North American Gas
Jone-Lin Wang, Vice President and Head, Power, Gas, Coal and Renewables–Americas
Daniel Yergin, Vice Chairman, IHS
James Stevenson, Associate Director, Coal
Xizhou Zhou, Director, China Energy
Shankari Srinivasan, Vice President and Managing Director Gas, Power, Renewables – EMEA/APAC
Pete Stark, Senior Research Director and Advisor
Lawrence Makovich (Chair), VP & Senior Advisor for Global Power, IHS
Anthony Earley, Chairman, CEO & President, PG&E Corporation
James Rogers, Chairman, President & CEO, Duke Energy
John Russell, President & CEO, CMS Energy Corporation and Consumers Energy Company

Luncheon Keynote
Gérard Mestralllet, Chairman & CEO, GDF Suez

Keynote Address
Daniel Poneman, US Deputy Secretary of Energy
Keynote Address
Rethinking the Energy Future

Bill Gates, Chairman, Microsoft; Co-Chair, Bill & Melinda Gates Foundation with Daniel Yergin

Strategy Sessions
Global Nuclear Outlook
What Future for Renewable Energy in an Age of Austerity and Unconventionals?
The Future of Coal: Changing Global Markets
Electricity Demand and Efficiency: Filtering the Noise from the Signal
An Expensive Decade: Financing Electric Power Infrastructure in the Decade Ahead
Shale Gas: Changing the Power Game
Plenary — Coping with Disruption: Lessons from Hurricane Sandy, Katrina, and Fukushima

Sergej Mahnovski, Director of Energy Policy, New York City Office of the Mayor
Deborah Caplan, COO, Florida Power & Light Company
Hisanori Nei, Former Deputy Director General at the Nuclear and Industrial Safety Agency, Councilor at Cabinet Secretariat
Daniel Poneman, US Deputy Secretary of Energy

Plenary — Evolving Power Market Rules and Institutions: US vs. Europe

Patty DiOrio (Chair), Director, North American Power, IHS
John Bear, President & CEO, MISO
Walter Boltz, Executive Director, E-Control Austria, Vice Chair of ACER’s Regulatory Board
Tony Clark, Commissioner, Federal Energy Regulatory Commission (FERC)
Donna Nelson, Chairman, Public Utility Commission of Texas
Fabien Roques (Chair), Senior Director, European Power and Carbon, IHS

Plenary — Power Engineering, Plant Equipment and Construction

Jim Hughes, CEO, First Solar
Deepak Khajouria, MD, Doosan Power Systems – North America
Thomas Shelby, Executive Vice President, Kiewit Energy Group
Lawrence Makovich (Chair), VP & Senior Advisor for Global Power, IHS
Africa Energy Summit

Irene Muloni, Minister of Energy and Minerals Development, Uganda

Abiye Membere, Nigerian National Petroleum Corporation

Sola Oyinola, Schlumberger

S.K. Srivastava, Oil India Limited

Hirobumi Kawano, President, Japan Oil, Gas and Metals National Corporation (JOGMEC)

Haruna Masebu, Director General of the Energy and Water Utilities Regulatory Authority, Tanzania

Arsenio Mabote, Chairman, Instituto Nacional de Petroleo, Mozambique

Abiye Membere, Nigerian National Petroleum Corporation

Sola Oyinola, Schlumberger

Irene Muloni, Mike Daly, Executive Vice President, Exploration, BP

Abiye Membere, Irene Muloni, Yousef Yousfi
Keynote — The Future of Competitiveness in a Globalized World

Frederick W. Smith, Chairman & CEO, FedEx Corporation

Thirty Year View

Climate Change and Energy Transition: The Long View

Atul Arya (Chair), Senior Vice President, Energy Insight, IHS
Keynote — Cyber Threats: Fighting the Battle of the Future

General Michael Hayden, Former Director of the Central Intelligence Agency, Former Director of the National Security Agency

Jerre Stead
Executive Chairman, IHS

Daniel Yergin, IHS CERAWeek Chairman
Energy Market Outlook: What will be the Surprises in 2013 — and Beyond?

James Burkhard, VP and Head of Oil Market Research & Scenarios, IHS
Michael Stoppard, Managing Director, Research, IHS
Lawrence Makovich, Vice President and Senior Advisor for Global Power, IHS
Atul Arya (Chair), Senior Vice President, Energy Insight, IHS
Xizhou Zhou, Director, China Energy, IHS
Thane Gustafson, Senior Director, Russian and Caspian Energy, IHS
John Larson, Vice President, Economic and Public Sector Consulting, IHS

IHS World Economic Outlook — 2013 and Beyond

Nariman Behravesh, Chief Economist, IHS (also in inset above)
Nigel Gault, Chief US Economist, IHS
Diego Iscaro, Senior Economist, Europe, IHS
Alistair Thornton, Senior Economist, China, IHS
ENERGY INSIGHT BREAKFASTS & IHS EXPERT BRIEFINGS

Oil

Energy Insight Breakfasts
Oil Expert Discussion Tables
Energy Innovation Pioneers
North American Tight Oil: Delivering on the Promise
Canadian Oil Sands: At the Cross Roads?
Russian Oil at a Time of Change: Tight Oil, Arctic Offshore, and New Partnerships

IHS Expert Briefings
Water and Unconventional Oil and Gas: Emerging Best Practices, Technologies and Regulation
The Big Crew Change: Demographic Transitions in the Oil and Gas Workforce

Natural Gas

Energy Insight Breakfasts
Gas Expert Discussion Tables
Energy Innovation Pioneers
Upstream Competitive Landscape: What the Future Holds for INOCs and Service Companies
Capturing the Economic Benefits of Energy Development in Africa
South and Southeast Asia: New Challenges, New Opportunities
Middle East Energy Investment
Russian Upstream Strategy: Gas and Oil Producers Face a New Era

IHS Expert Briefings
Middle East: The New Convergence of Politics, Energy and Investment
Africa Opens for Business: Opportunities and Risks for Energy Investors
Gas and Power at the Nexus of Discord in Central Asia
World Transportation Oil Demand: Heading Towards a Peak?
Cyber Threats: The War that is Being Waged
North America NGLs: Opportunities for Feedstock and Fuel Markets

Power

Energy Insight Breakfasts
Power Expert Discussion Tables
Energy Innovation Pioneers
Diversifying China’s Power Generation Mix
Emerging Solar Markets
Transmission and Distribution: Transforming the Power Grid
All Eyes on Texas: The Challenges of Powering a Growing Economy

IHS Expert Briefings
Operational Excellence and Sustainability: How are organizations integrating sustainability into operations?
Asia Gas and Coal – Where Will We Be in 2025?
Latin America Power: State participation in Latin America’s power sector – leading the way forward or a drag on expanding opportunities?
North American Power – How will markets and technology choices respond to abundant natural gas?
European Power — Is the Greening of European Power Under Threat?
The Future of Middle East and North African Power
North American Natural Gas: What to Expect?
IHS CERAWEek® is the energy industry’s preeminent gathering of industry leaders and government officials, offering new ideas, insight, and discussions on major strategic issues facing the global energy industry. 2013 marked the 32nd anniversary for the annual executive conference.

Delegates
2,800+ senior energy executives, government officials and thought leaders from the energy, policy, technology, and financial communities.

Speakers
220+ industry leaders, government officials and thought leaders.

Media

IHS CERAWEek 2013 generated 2,811 total media stories.

Energy Innovation Pioneers
The Energy Innovation Pioneers program recognizes companies whose technologies and business plans, exemplify the following criteria: invention and creativity, feasibility and timeliness, scalability and quality of management team. IHS CERAWEek® 2013 recognized 21 pioneers. Past Energy Innovation pioneers have achieved remarkable success including 6 who have gone on to IPO.

Program
IHS CERAWEek® featured keynote addresses, plenaries, ministerial dialogues, strategy sessions, energy insight breakfasts, and IHS expert briefings on a range of topics:

- World Economic Outlook
- Technology Innovation
- Geopolitics
- Prospects for a Global Unconventional Revolution
- Cyber Threats
- License to Operate
- Energy Development in Africa
- Energy Policy and Regulation
- Climate Change and Energy Transition
- Coping with Disruption
- Future of Competitiveness in a Globalized World
“The speakers list represents the world oil industry’s who’s who” — NBC News

“...described as ‘the Davos of energy,’ has always attracted a high-powered line-up of executives and policy makers to Houston.” — Financial Times

“The world’s preeminent energy conference” — CNBC

“Industry leaders gather in Houston for IHS CERAWeek energy conference” — Houston Chronicle

“The year’s preeminent energy gathering” — Wall Street Journal

“The oil and gas industry’s Super Bowl” — Politico

“One of the most important energy conferences in the world, IHS CERAWeek” — Bloomberg Television

“The biggest executives in energy are gathering for the 32nd annual IHS CERAWeek” — CNBC Television


IHS CERAWEK 2013 generated 2,811 total media stories.
DATE: March 3-7, 2014
PLACE: Hilton Americas Houston, Texas

For the latest information on Program and Speakers go to: www.ceraweek.com

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IHS is the leading source of information, insight and analytics in critical areas that shape today’s business landscape. Businesses and governments in more than 165 countries around the globe rely on the comprehensive content, expert independent analysis and flexible delivery methods of IHS to make high-impact decisions and develop strategies with speed and confidence. IHS has been in business since 1959 and became a publicly traded company on the New York Stock Exchange in 2005. Headquartered in Englewood, Colorado, USA, IHS employs more than 6,000 people in more than 31 countries around the world.