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NATIONAL OIL COMPANIES

Strategies to Sustain Growth in a Competitive Market

21 – 23 November 2011, Kuala Lumpur, Malaysia

Jointly Organised by:

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Why Attend This Strategic Course?

The current strategies, policies and requirements of National Oil Companies (NOCs) are having a substantial impact on the direction and dynamics of the present-day petroleum sector. The 60+ NOCs are rapidly emerging as major factors in today's demand driven environment, with sovereign control over considerable resources yet to be developed and produced. International Oil Companies (IOCs) control less than 20% of the world's proved oil and gas resource base. Indeed the super-majors themselves account for only 3% of oil reserves and 2% of gas reserves, although they have 20% of production, through contractual arrangement with the NOCs. When ranked on the basis of proved oil and gas reserves, 17 of the top 20 oil and gas companies in the world are NOCs. Nearly 75% of the oil reserves are held by OPEC members.

As the world's appetite for energy continues to grow, fuelled by increasing demand from rapidly developing economies, such as in China and India, the fundamentals have changed. With supply constrained and demand ascendant, the traditional roles of NOCs and IOCs are changing. Many of the national oil companies are moving away from their previous more nationalistic role as licensing agency and passive partner to the international oil companies. They are becoming active in developing and acquiring equity positions and resources in the international arena, both upstream and downstream. They are winning blocks and taking over companies. Several NOCs are now present in 20-30 countries. They are taking more of the economic rent in their own countries. They are dealing more with one another on a government to government basis and are actively competing with IOCs in bidding situations outside their own borders. They are, in effect, becoming international national oil companies, a challenge in itself.

By attending this 3 day strategic course, participants will be able to draw lessons from industry best practices and learn how NOCs and governments can work together in empowering their workforce, fostering local content and promoting industrial development around your oil and gas resources.

By attending this course you will:

- Assess the objectives and current strategies NOC's today
- Review leading examples from NOCs and select best practices
- Examine the basis for the NOC/IOC relationships
- Look into the leading NOCs' strategies and motivations
- Weigh up the advantages and disadvantages of different models of NOCs ownership
- Analyse key strategies technology and R&D development
- Uncovering the potential in the exploitation of Natural Gas
- Receive regional updates on what NOCs are doing around the world

Hear what previous participants have said about this course in March & November 2009/10

"Willy has so much information, his insights and "inside" stories are what you wouldn't find through general reading"

"Analysis of successful and unsuccessful IOCs and NIOCs for us to follow"

"The review & analysis for future Oil & Gas industry, IOCs and NOCs very well summarised. This is definitely good for corporate planners, company strategist as a reference."

"Very experienced trainer, good presentation method (story-telling) which makes it easy to follow him

"Great course backed by credible data"

Past participants include PETRONAS Holdings, Carigali, Acergy Group, Maersk Drilling, Sealink, Petroleum Brunei, UMW Oil & Gas, APITO, Transwater API, Star Reacher, PT Oiltanking Merak, Banzo Bilbao Vizcaya Argentaria S.A, Talisman Malaysia, Rhodia Asia Pacific, PCPP Operating Company, PTT Exploration and Production Public Company, Kencana Petroleum, Shell Global Solutions, ExxonMobil Exploration and Production Malaysia, PETRONAS Carigali Equatorial Guinea, Petronas, PCPP Operating Company, Ministry of Energy and Power Development and many others



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3 Day Course Agenda

Session 1: The global oil and gas outlook

- ◆ The price outlook after the global financial crisis
- ◆ Who will drive future oil and gas demand?
 - Asia? - Middle East?
 - Europe? - Americas?
- ◆ Who can deliver the oil the world – and especially Asia – will be look for?
 - Iraq & the Middle East? - Caspian?
 - West Africa? - Brazil?
- ◆ Who will supply natural gas?
 - Russia? - Australia? - Middle East?
- ◆ Will international oil companies have access to reserves and on what terms?
 - Resource nationalism still important?

Case Study

The growing importance of China and the Chinese national oil companies. China's approach compared to India's and South Korea's approach.

Session 2: NOC objectives and missions

- ◆ NOC's missions – what has changed over time?
- ◆ The NOCs are far from identical
- ◆ Drivers for change
- ◆ Who is driving the process? Political leaders or the NOC management?
- ◆ National Development – national mission
 - Hydrocarbon Sector
 - Non-Oil Sector, Infrastructure, Employment, Health, Education
- ◆ NOC as a political instrument or a commercial tool

Case Study

A top NOC's – the model many would like to copy. Looking at the company's strength and weaknesses

Session 3: NOC – IOC relationship

- ◆ What are the NOCs looking for?
- ◆ What can the IOCs offer?
- ◆ Why have countries like Malaysia, Norway, Qatar and Angola found succeeded?
- ◆ Is the traditional basis for the strategic partnership changing?
- ◆ Do NOCs need still the IOC's finance, technology and management practices?
- ◆ Do the IOCs have to expand the relations beyond upstream into downstream investments

Case Study

Iraq bidding round – where IOCs and NOCs formed partnerships

Session 4: NOCs becoming more commercialized – and even privatized

The session will look at experience of national oil companies that have become more commercialized and become listed on the international markets. It will address the challenges some national oil companies are facing as they move in the same direction, like Pertamina and NNPC in Nigeria.

It will also address the risk as many NOCs are moving internationally and are facing a new operating environment like Chad, Sudan, Turkmenistan, Russia and Uzbekistan. Do they have the competence to understand the risks? Are they willing to take more risks than the international oil companies?

NOCs governance and transparency will also become an issue as the companies becomes global players,

Case Study

The case of Statoil in Norway and Ecopetrol in Colombia.

Norway's national oil company, StatoilHydro, is often described as a success story. The study will show the road from being a government instrument, to the privatisation and the merger with Hydro's oil and gas business. The study will address the changing strategies and the way the company had to change the way is looked at its performance.

Ecopetrol is one of the latest national oil companies to implement the reforms. What are the lessons learned and what has happened to the company in the last twelve months?

Session 5: NOC's technology strategy

National oil companies are faced with more complex oil and gas reserves requiring new technological solutions. The session will look at how leading NOCs address the challenges, their investment in research and development, and their relationships to IOCs and to the service industry. Many international oil companies see their ability to integrate technology solutions as their strongest asset in the relations with NOCs. What are IOCs doing? What are the service companies and technology providers doing?

Themes to be addressed

- ◆ Increased oil recovery challenge
- ◆ The deeper waters
- ◆ The more complex reservoirs
- ◆ The harsher environments
- ◆ The heavy oil challenge
- ◆ The climate challenge – carbon capture
- ◆ The role of the technology providers
- ◆ The importance of R&D

Case Study

Petrobras in Brazil is one of the most advanced national oil companies. It is one of the leading deep water players in the world and it is now developing large and complex resources below salt offshore Brazil. The TUPÍ field is the first of many projects. What is Petrobras strategy? How is the company involving the Brazilian oil and gas industry in the strategy?

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Session 6: NOCs dominant role in the oil market

National oil companies control the world's oil reserves and they are also fast expanding their share of production and refining capacity. OPEC will become more important as a supplier to the world oil and gas markets.

The sessions will look at

- ◆ The country's and companies that can expand production
- ◆ The refining sector outlook
- ◆ The retailing

Case Study

Saudi Aramco is maintaining spare capacity on behalf of the world market. It is the largest crude oil producer in the world. It is in the middle of a major investment program, both upstream and downstream. It also has major responsibilities in Saudi Arabia's economic development. What is its strategy and ambitions?

Session 7: Natural gas – an area still in need of close cooperation between IOCs and NOCs

The session will look at NOCs strategies and ambitions and how they are moving into the LNG chain. Gazprom, Petronas, Sonatrach and StatoilHydro are already global players. Other NOCs have primarily focused on use of gas in the domestic market.

The sessions will also discuss how different countries, like Papua New Guinea, are developing their gas sector. The session will also address the changing gas market.

- ◆ Floating LNG's future
- ◆ The growth of unconventional gas
 - Shale gas
 - Coal seam gas

Case study

Qatar is becoming the world's largest LNG exporter. The study will look at what is happening and the cooperation between Qatar Petroleum and leading international oil companies.

Session 8: Maximizing the benefits from oil and gas activities

Governments in resource rich countries are looking for getting more than just revenues from the oil and gas activities. They want jobs, competence, technology and transfer of technology. They increasingly want to use resources – like gas – in their own economy to expand into petrochemicals etc. National oil companies mandate has always gone beyond making profits for shareholders.

Case Study

What are the successful tools used around the world to add benefits to the countries that own the resources?

Who Should Attend?

Professionals from oil industry who need to make strategic planning and investment decisions and need to understand the dynamics of the market. This includes:

- Directors, General Managers and Senior managers
- Strategic Planners
- Business and Corporate Planning managers
- Government officials
- Joint Venture Managers and Advisors
- Commercial managers
- Finance Managers
- Government relations and country representative executives

This course will also offer IOCs & service company executives practical and insightful information about their business partners.

About your Expert Course Facilitator: Willy Haakon Olsen



Willy Haakon Olsen

Willy H Olsen has over 25 years of experience with Statoil, the national oil company of Norway. When he retired he had been a Senior Advisor to the President & CEO of Statoil for several years. He joined Statoil in 1980 after 15 years in journalism. During his time in Statoil Willy H Olsen has held a number of positions, including Senior Vice President Government Affairs, Managing Director Statoil UK, Senior Vice President E&P International with responsibility for the countries in the former Soviet Union and Senior Vice President Corporate Strategy. Willy H Olsen has an in-depth knowledge of Norway's development as one of the leading global oil and gas producers and of Statoil's development as a national oil company from its role as an instrument for the government to its listing in New York and Oslo in 2001. He has over the last ten years also made a number of presentations at international conference on the Caspian developments and on the need for transparent oil revenue management. He has been a member of various advisory boards on Caspian and Russia, and is a Governor in the Board of Oxford Energy Institute.

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REGISTRATION FORM

21- 23 November Kuala Lumpur, Malaysia	Early Bird Price	Normal Price	Group Discounts*
3-DAYS NATIONAL OIL COMPANIES: STRATEGIES TO SUSTAIN GROWTH IN A COMPETITIVE MARKET	SGD3,150.00	SG\$3,500.00	PetroEdge recognises the value of leaning in teams. Group bookings at the same time from the same company receive the following: ▪ 3 or more at 5% off ▪ 5 or more at 7% off ▪ 8 or more at 10% off Group Discounts are exclusive from Early Bird discount and other promotions
PETRONAS CORPORATE RATE * NOT APPLICABLE FOR JV RELATED ORGANISATIONS	SGD2,850		

Participants from the PETRONAS Group qualify for corporate pricing, please email info@asiaedge.net for further information or contact Shamsuri Othman (Learning Engagement Consultant) at PETRONAS Management Training Sdn. Bhd.

PetroEdge In-house Training

Yes, I would like to organise this training on-site and save over 25% of total course fees! For further information about In-house Training Solutions, please +65 67419927 or email info@asiaedge.net

DELEGATE DETAILS

Name : Dr Mr Mrs Ms _____

Job Title : _____ **Department** : _____

Telephone : _____ **Fax** : _____

Email : _____

Company : _____

Address : _____

Country _____ Postcode _____

Head of Dept : Dr Mr Mrs Ms _____
(Please photocopy this form to register multiple delegates)

If different from above

Attention Invoice to : _____

Telephone : _____ **Fax** : _____

Email : _____

4 Easy Ways to Register

<input type="checkbox"/> Online www.petroedgeasia.net	<input type="checkbox"/> email info@asiaedge.net
<input type="checkbox"/> Phone (65) 6741 9927	<input type="checkbox"/> Fax (65) 6747 8737

Please note:

- Indicate if you have already registered by
 Phone Fax Email Web
- If you have not received an acknowledgement before the training course, please call us to confirm your booking.

METHODS OF PAYMENT

- By Cheque / Bank Draft: Make payable to **Asia Edge Pte Ltd**
- By Direct Transfer: Please quote **AE1** with the remittance advise
Account Name : Asia Edge Pte Ltd
Account Number : 762903-001
Bank Number : 508 Swift Code: OCBCSGSG

All bank charges to be borne by the payer. Please ensure that Asia Edge Pte Ltd receives the full invoiced amount.

PAYMENT POLICY

Payment is due in full at the time of registration. Full payment is mandatory for event attendance. I agree to Asia Edge Pte Ltd payment terms.

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