

Monday, March 11

## Plenary

10:30am - 11:15am

### Conference Opening: Geopolitical Dialogue

- **Carlos Pascual**, Senior Vice President (Chair), IHS Markit

## Plenary

11:15am - 12:00pm

### Fuels of the Future: The new rivalry

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

## Plenary

12:00pm - 12:25pm

### Leadership Dialogue

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

## Break

12:25pm - 12:50pm

## Luncheon & Plenary

12:40pm - 1:50pm

### Luncheon & Opening Dialogue

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

## Plenary

1:50pm - 2:15pm

### Leadership Dialogue

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

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**Break**

2:15pm - 2:30pm

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**Plenaries**

2:30pm - 3:15pm

**Company Strategies in a World of Change**

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit

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**Plenary**

2:30pm - 3:15pm

**Company Strategies in a World of Change**

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit

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**Plenaries**

3:20pm - 4:05pm

**Climate Strategies in a World of Rivalry**

- **Carlos Pascual**, Senior Vice President (Chair), IHS Markit

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**Digital Transformation: Creating value**

- **David Hicks**, Senior Vice President, Upstream Energy (Chair), IHS Markit

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**Plenary**

3:20pm - 4:05pm

**Digital Transformation: Creating value**

- **David Hicks**, Senior Vice President, Upstream Energy (Chair), IHS Markit

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**Break**

4:05pm - 4:20pm

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**Plenary**

4:20pm - 4:45pm

**Leadership Dialogue**

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)
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**Plenary**

4:45pm - 5:10pm

**Carbon Management Strategies**

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit
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**Plenary**

5:10pm - 5:35pm

**Global Oil Dialogue**

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)
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**Plenary**

5:35pm - 6:00pm

**Future of Transportation Dialogue**

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)
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**Plenary**

6:00pm - 6:30pm

**Cybersecurity: New threats, new responses**

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)
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**Conference-wide Reception**

6:30pm - 7:30pm

## Insight Dinners

7:30pm - 9:00pm

### Company Strategies in a Low Carbon World

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit

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### Cyber

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### Driving Change: Cities and the future of mobility

- **Katherine Hardin**, Vice President, Energy (Chair), IHS Markit

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### Industrial Efficiency

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### North Sea

- **Jon Story**, Senior Director, Energy (Chair), IHS Markit

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### Outlook for the Global Economy

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### Plastics Sustainability: Meeting the challenge

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### The Human & Machine Interface: AI & machine learning

- **Susan Farrell**, Vice President, Energy-Wide Perspectives, IHS Markit
- **Judson Jacobs**, Senior Director, Upstream Technology & Innovation, Energy, IHS Markit

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### US Energy Policy

- **Carlos Pascual**, Senior Vice President (Chair), IHS Markit

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**Workforce of the Future**

Tuesday, March 12

**Breakfast Strategic Dialogues**

7:30am - 8:40am

Latin America is facing increasing pressure to accelerate energy access for all while doing so cheaply, sustainably, and with as much local content as possible. Consumer fuel prices and import dependence have factored directly into recent elections in Mexico and Brazil. Natural gas integration with power systems has become a central theme linked to emissions reductions, renewables intermittency, and the competitiveness of the value chain from upstream producer to power generator. What is the best path for building a competitive energy market place? Can governments manage the balance between investment to diminish energy poverty and decreasing government debt? Is it all about private public partnerships? What is the common ground between investors and national governments?

**Asian NOCs: Repositioning portfolios for growth**

The growing disparity in the energy balance, and the relative upturn in oil prices, was expected to spurn a renewed international growth phase for Asian NOCs, but activity has been relatively muted in the M&A space. Instead, greater focus is being put forth on domestic and regional assets, which are an avenue for growth in the medium term. Separately, key producing contracts are transitioning to host NOCs, which could have a marked impact on the future competitive landscape, investment/production outlook, and exploration activity for the region. What are the near-term priorities shaping portfolio decisions? How central is technology and innovation to unlocking new resources? How will the changing competitive landscape impact regional investment?

**Canada's Oil Crisis: Getting out of a jam**

- **Kevin Birn**, Vice President, North American Crude Oil Market (Chair), IHS Markit

**Carbon Price: Where are we now and where are we going?**

- **Steven Knell**, Director, Energy Wide Perspectives (Chair), IHS Markit

**Competing for Upstream Investment: Rewriting Africa's story**

Africa offers a vast array of frontier, emerging, and mature phase basins for upstream players across a range of aboveground challenges and risks in both Saharan and Sub-Saharan regions. Substantial volumes of oil and (mainly) gas have been discovered over the past decade and now offer opportunities for monetization. Several upcoming exploration wells have the potential to be play openers and many governments aspire to have new licensing rounds, but the global competition for upstream risk capital is intense. What role should NOCs play? How can aboveground factors be best managed—by investors, NOCs, and host governments—to maximize value for all? Are governments positioned to compete for a more limited pool of upstream capital?

**Deepwater Revival: Testing the waters**

Although investment in the deep water is finally rising, intense competition for capital continues. New areas with increasingly diversified investors, such as in Mexico, Brazil, and Africa's MSGBC Basin, appear to be vying (successfully) with more traditional

deepwater areas, such as the US Gulf of Mexico, Angola, and Nigeria, where consolidation and focus are key drivers. What are the new areas where the industry anticipates much greater investment focus? What are the different risks? What are the more traditional areas where investment outcomes appear to be less optimistic? Is the overall level of deepwater investment going to be lower or will technology and government terms react to increase attractiveness?

- **Gerald Kepes**, Head of Strategy & Competition Group, Upstream Research & Consulting Division, Energy Insight (Chair), IHS Markit

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### **Digitalization: Innovating for lower costs**

“Digital Transformation” has become the latest must-have fashion accessory for oil & gas companies in recent years as they seek to assure shareholders of their ability to improve efficiency and embrace the vast set of opportunities emerging from massive (and growing) data resources, advances in computing power, sensors, advanced analytics, and artificial intelligence (AI). Some great strides have been made in reducing structural costs in both conventional and unconventional upstream projects. But in practice, what are the full range of innovations that have had impact? How much further impact can innovation have on reducing project and operating costs? What is the interplay needed between digital technologies, traditional E&P technologies, and changes in operating models and organizational models to realize these further gains?

- **Judson Jacobs**, Senior Director, Upstream Technology & Innovation, Energy, IHS Markit

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### **North American Refining: Export powerhouse?**

- **Kevin Lindemer**, Managing Director, Downstream Consulting, Energy (Chair), IHS Markit

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### **Russian Energy**

- **Matthew Sagers**, Executive Director, Energy (Chair), IHS Markit

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### **The Big Three: Role of Russia, Saudi Arabia & the United States**

- **Bhushan Bahree**, Executive Director, Global Oil (Chair), IHS Markit

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### **The Decarbonization of Transportation: Beyond passenger cars**

- **Daniel Evans**, Vice President, Global Refining and Marketing Research (Chair), IHS Markit

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### **Wellhead to Water: Constraints on getting US oil to market**

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## What Does Competitiveness Mean Across Latin America?

Latin America is facing increasing pressure to accelerate energy access for all while doing so cheaply, sustainably, and with as much local content as possible. Consumer fuel prices and import dependence have factored directly into recent elections in Mexico and Brazil. Natural gas integration with power systems has become a central theme linked to emissions reductions, renewables intermittency, and the competitiveness of the value chain from upstream producer to power generator. What is the best path for building a competitive energy market place? Can governments manage the balance between investment to diminish energy poverty and decreasing government debt? Is it all about private public partnerships? What is the common ground between investors and national governments?

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### Plenary

8:50am - 9:15am

#### Welcome & Special Address

- Daniel Yergin, Vice Chairman, IHS Markit (Chair)
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### Plenary

9:15am - 9:40am

#### Opening Oil Dialogue

- Daniel Yergin, Vice Chairman, IHS Markit (Chair)
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### Plenary

9:40am - 10:00am

#### Future of Transportation Dialogue

- Daniel Yergin, Vice Chairman, IHS Markit (Chair)
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### Plenary

10:05am - 10:55am

#### Downstream Dialogue

- Daniel Yergin, Vice Chairman, IHS Markit (Chair)
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### Plenary

10:55am - 11:25am



## Leadership Dialogue

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

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## Break

11:25am - 11:35am

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## Agora Studios

11:35am - 12:35pm

### Biofuels 2.0

- **Kevin Lindemer**, Managing Director, Downstream Consulting, Energy (Chair), IHS Markit

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## Strategic Dialogues

11:35am - 12:35pm

### Climate Change Implications for Energy Investment

- **Susan Farrell**, Vice President, Energy-Wide Perspectives (Chair), IHS Markit

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### Eurasian Upstream's Role in Managing the Global Oil Market

Russia and other key Eurasian oil producers have renewed their agreement to remain part of the Vienna Alliance, to cut their production to help rebalance to the global oil market as it has swung from oversupply to undersupply, and back to oversupply. This session covers the goals the participants hope to achieve and mechanisms for implementing the cuts. It also will look at the duration and staying power of the arrangement.

- **Matthew Sagers**, Executive Director, Energy (Chair), IHS Markit

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### Future of the Upstream: Strategies to achieve growth and performance

Since the oil price drop in 2014, oil & gas companies have refocused their portfolios in search of cost competitiveness. As a result, more companies have become de-facto specialists for certain asset types or geographies (such as North American unconventional, oil sands, integrated gas projects). Conversely, the energy transition is spurring some larger companies to diversify into low-carbon solutions. How will this dichotomy of specialization and diversification impact the design of future upstream portfolios? How will diversified players make their capital allocation decisions between quite different business segments? What impact will the energy transition have on each class of upstream players?

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### IMO: How big a disruption?

- **Sandeep Sayal**, Vice President, Downstream Energy Research (Chair), IHS Markit

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## Is Refining Supply to Asia Racing Ahead of Demand?

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### Light-duty Vehicles: Reshaping the oil demand curve

- **Katherine Hardin**, Vice President, Energy (Chair), IHS Markit

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### NOC Strategies for the Energy Transition

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit

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### Oil Markets: Riding the roller coaster

- **James Burkhard**, Chief Researcher, Global Oil Markets & Energy Scenarios, Energy; CERAWEEK Vice Chairman (Chair), IHS Markit

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### Retail Marketing: Back in vogue

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### Returns versus Growth: US E&P squaring the circle

With shareholders increasingly focused on returns, how is the US shale sector adapting to this financing constraint, and what are the structural impact of this shift on growth, competition, private financing and business specialization? How has this impacted international financial stakeholders and their investments in global E&P?

- **Roger Diwan**, Vice President, Financial Services (Chair), IHS Markit

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### Sanctions and the Energy World: Impacts and outcomes

Sanctions are increasingly applied—against Russia, Iran, Venezuela, and other energy producers—to condemn national policies or international interventions. When do sanctions work as a tool between diplomacy and military action? How should scale of energy production, market alternatives, and shared international consensus be factored into sanctions on energy supply? What can be the unintended consequences—in sanctioned countries and internationally? When do you declare that sanctions fail, and what do you do about it?

- **Carlos Pascual**, Senior Vice President (Chair), IHS Markit

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**US Shale: The new giant—How far and how fast?**

- **Raoul LeBlanc**, Vice President, North American Unconventionals (Chair), IHS Markit

**Break**

12:35pm - 12:45pm

**Luncheon & Plenary**

12:40pm - 1:55pm

**Luncheon & Dialogue: New world of rivalries****Plenary**

2:00pm - 2:25pm

**Leadership Dialogue**

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

**Break**

2:25pm - 2:35pm

**Plenary**

2:35pm - 3:10pm

**The Future of Mobility****Break**

3:10pm - 3:15pm

**Plenaries**

3:15pm - 4:00pm

**Growth in Petrochemicals: Risks & opportunities**

- **David Witte**, Senior Vice President; Division Head, Energy & Chemicals (Chair), IHS Markit

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**North American Shale: Taking on the world**

- **Daniel Yergin**, Vice Chairman, IHS Markit (Chair)

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## Break

4:10pm - 4:20pm

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## Plenaries

4:10pm - 4:55pm

### Future of the Global Upstream

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit

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## Ministerial Dialogue

- **Carlos Pascual**, Senior Vice President (Chair), IHS Markit

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## Break

4:55pm - 5:05pm

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## Plenaries

5:05pm - 5:45pm

### Downstream: Competing through the cycles

- **Kurt Barrow**, Vice President, Oil Markets, Midstream and Downstream Insights (Chair), IHS Markit

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## Will Gas Be the Bridge Fuel?

- **Atul Arya**, Senior Vice President and Chief Energy Strategist (Chair), IHS Markit

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## Expert Dialogues

5:50pm - 6:30pm

### China's Future Gas Supply: Competition for a growing market

Many global gas suppliers have been eyeing China as a prime destination for their gas. Indeed, in our outlook, China's natural gas demand will grow roughly 100 Bcm every five years through 2030. Which gas supply sources will win the race to meet this growing

demand? In this Expert Dialogue, IHS Markit gas experts will share their insights on the different factors affecting the future of gas supply to one of the world's fastest growing gas markets.

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### **Gas and Renewables: The role of gas as a bridge fuel?**

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### **Gas and Oil Inverse Relationship**

- **Samuel Andrus**, Executive Director, Energy (Chair), IHS Markit
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### **Global Scenarios: Energy futures and carbon pathways**

- **Susan Farrell**, Vice President, Energy-Wide Perspectives (Chair), IHS Markit
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### **Conference-wide Reception**

6:30pm - 7:30pm

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### **Dinner & Plenary**

7:30pm - 9:00pm

### **Dinner & Dialogue**

Wednesday, March 13

**Strategic Dialogues (Breakfast)**

7:30am - 8:40am

Governments across Asia are looking at natural gas as a prime candidate to help address the local pollution and climate change issues. However, gas remains a premium fuel over the traditional fuel—coal—in many of these markets. As a result, it remains a challenging task to maintain domestic gas pricing at a level low enough to support demand growth but high enough to attract new supply. What are the potential pathways for domestic gas pricing in Asia to balance demand affordability with supply availability?

**Domestic Gas Pricing in Asia: How to accommodate new supply?**

Governments across Asia are looking at natural gas as a prime candidate to help address the local pollution and climate change issues. However, gas remains a premium fuel over the traditional fuel—coal—in many of these markets. As a result, it remains a challenging task to maintain domestic gas pricing at a level low enough to support demand growth but high enough to attract new supply. What are the potential pathways for domestic gas pricing in Asia to balance demand affordability with supply availability?

**Strategic Dialogues**

11:30am - 12:30pm

- The Shift to LNG Trading
- The Competitiveness of LNG: Costs and innovation
- Climate Change Implications for Energy Investment
- Options for Backup: Enabling renewable power
- Seeking Producer and Buyer Alignment
- How Will LNG Infrastructure Be Financed?
- Development in the Arctic: Opportunities & challenges

Thursday, March 14

**Thursday Sessions**

7:30am - 12:00am

Stay tuned. Thursday sessions will be added soon.

Friday, March 15

**Friday Sessions**

7:30am - 12:00am

Stay tuned. Friday sessions will be added soon.