26th World Gas Conference

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EVALUATION OF GLOBAL SHALE GAS RESOURCE DEVELOPMENT

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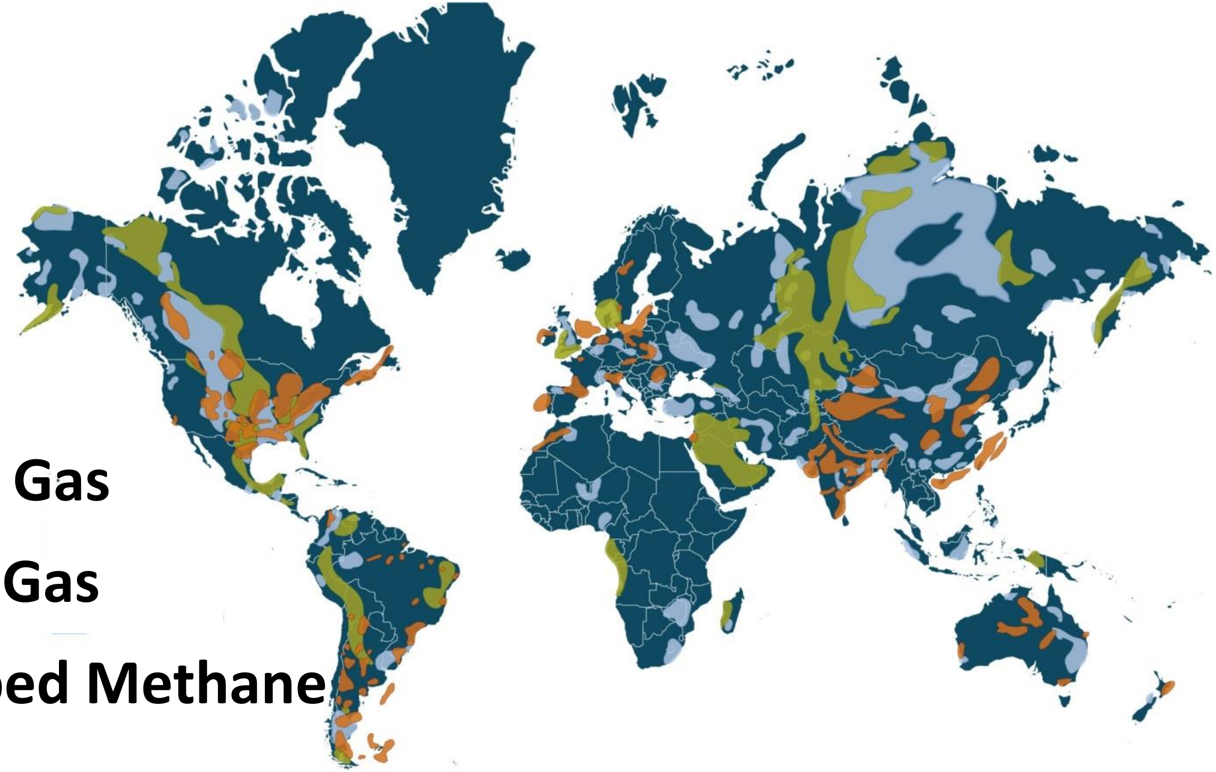
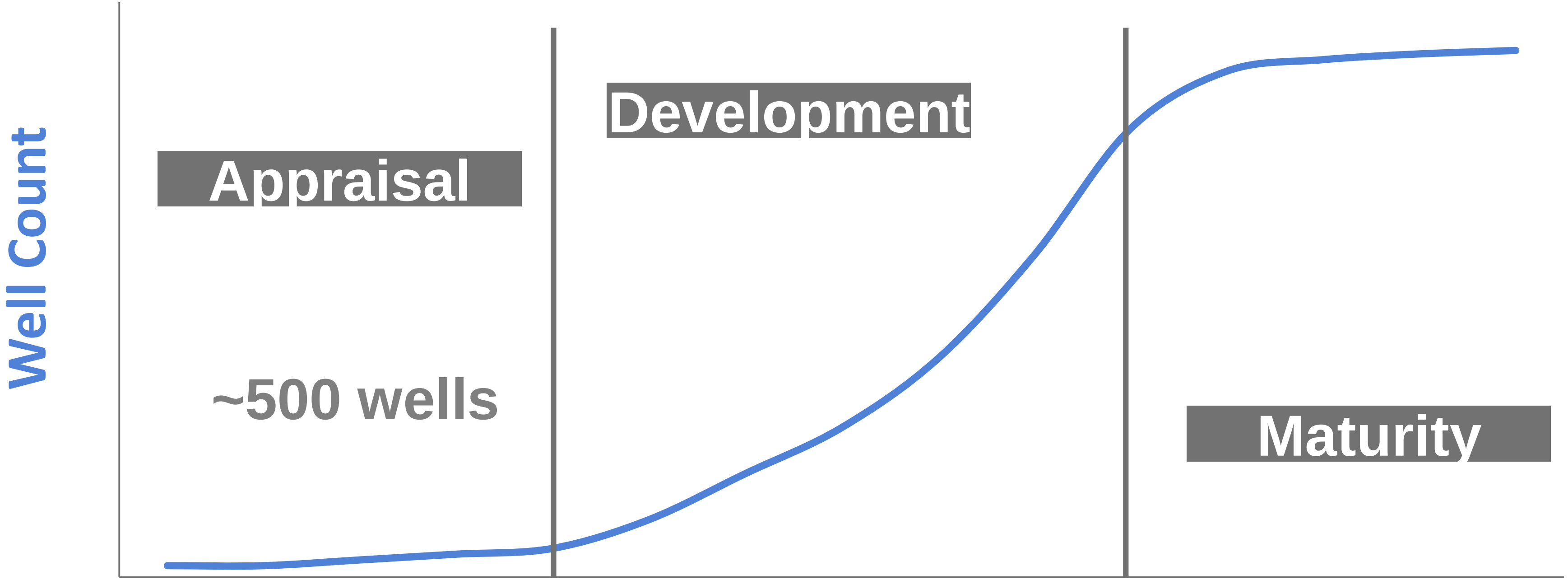
WGCPARIS2015
WORLD GAS CONFERENCE

Opportunities in shale gas exist in many global markets



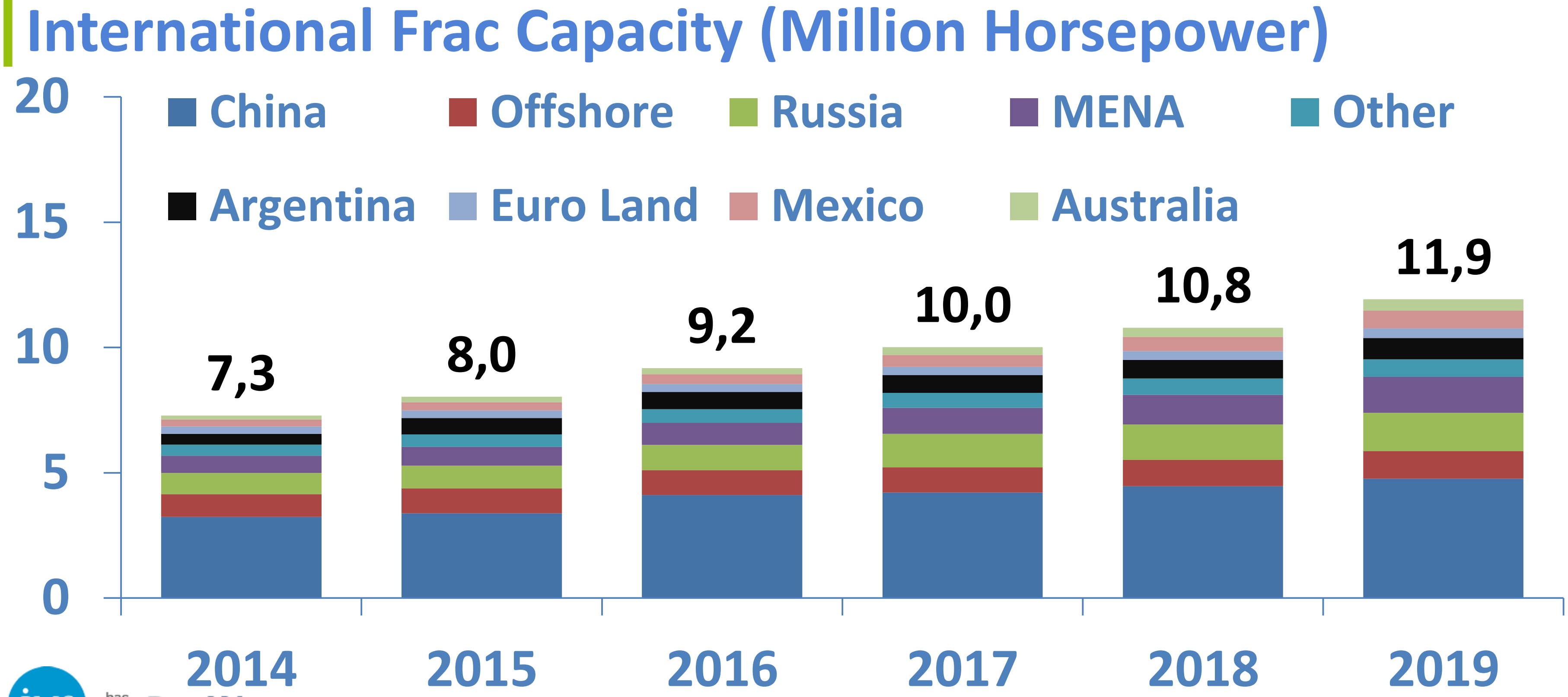
Shale plays experience long appraisal period

Development of a Shale Play



Sources: IHS analysis; industry sources; company reports

International Frac Capacity to grow 63% by 2019



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Sources: IHS analysis; industry sources; company reports

Multiple factors influence international progress

International Unconventional Assessment Framework

Dimension	Weighting
Geology	20%
Commerciality	15%
OFS capacity	15%
Financial structure	10%
E&P landscape	10%
Regulatory landscape	10%
Infrastructure	10%
Development constraints	10%

Country
Australia
China
Saudi Arabia
Oman
Mexico
Argentina
Brazil
Colombia

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Sources: IHS analysis; industry sources; company reports

KSA, China, and Argentina most promising markets

Unconventional Assessment

Legend: ○ ◔ ◑ ◕ ● → High

Dimension	USA	KSA	Oman	Australia	Russia	Argentina	China Tight	China Shale	Mexico	Brazil
Geology	●	◕	◕	◕	◕	●	◕	◕	◕	◑
Commerciality	●	◕	◑	◑	◑	◕	◕	◕	◑	◑
OFS capacity	●	◕	◑	◔	◑	◑	◑	◔	◑	◑
Financial structure	●	◕	◑	◑	◑	◔	◑	◕	◕	◑
E&P landscape	●	◔	◑	◑	◑	◕	◔	◑	◑	◑
Regulatory landscape	●	◑	◕	◕	◔	◑	◕	◕	◕	◑
Infrastructure	●	◑	◑	◑	◑	◔	◕	◑	◑	◔
Development constraints	◕	◕	◕	◕	◔	◑	◕	◑	◑	◑
Weighted Score	3.9	2.6	2.4	2.3	2.0	2.5	2.6	2.4	2.4	1.9

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