

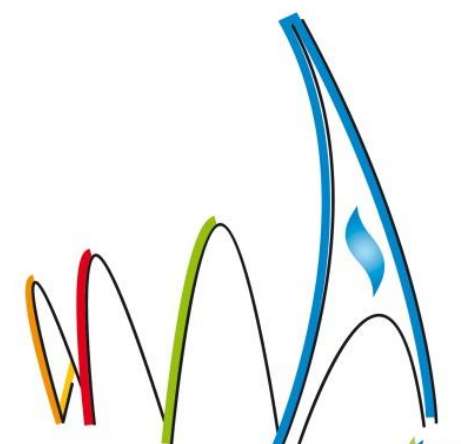
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THE ROLE OF GAS IN EMERGING COUNTRIES:
CHALLENGES AND OPPORTUNITIES

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Reserves: Our use of the term “reserves” in this presentation means SEC proved oil and gas reserves.

Resources: Our use of the term “resources” in this presentation includes quantities of oil and gas not yet classified as SEC proved oil and gas reserves. Resources are consistent with the Society of Petroleum Engineers 2P and 2C definitions. Organic:

Our use of the term Organic includes SEC proved oil and gas reserves excluding changes resulting from acquisitions, divestments and year-average pricing impact. Resources plays: Our use of the term ‘resources plays’ refers to tight, shale and coal bed methane oil and gas acreage.

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ENERGY CHALLENGE



EMERGING COUNTRIES: SUB SAHARAN AFRICA



EMERGING COUNTRIES: ASIA



