



# 17<sup>th</sup> Scramble for Africa

## Strategy Briefing

Cape Town - Monday 26 October 2015

Separately Bookable



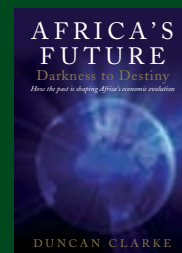
Our widely-acclaimed **Scramble for Africa: Strategy Briefing**, held prior to Africa Upstream Conference, provides unrivalled insights into the Continent's fast-changing corporate upstream oil and gas game. The Strategy Briefing is built on 35 years plus of oil-gas and economics knowledge, based on extensive research and insider relationships held across Africa and the world. Presentations are made by Dr Duncan Clarke (Chairman of the Board, Global Pacific & Partners), the leading strategist, speaker, thinker, writer and author on Africa's fast-growing, complex upstream game.

Unique to Global Pacific & Partners, this high-quality Strategy Briefing tracks changing competitor maps across Africa's exploration landscapes for oil and gas-LNG companies and foreign state oil firms, within the shifting paradigms shaped by governments and national oil companies. It provides deep-level and seasoned insights with critical interpretations on the strategies of around 750+ corporate players, in a one-of-a-kind review which reveals Africa's emerging and evolving petro-cartography found above-ground, shown as never seen before.

Duncan Clarke is author of the path-breaking, widely-acclaimed continent-wide, 100-year historiography of the upstream and the exploration game, elaborated in *Africa Crude Continent: The Struggle for Africa's Oil Prize* (Profile Books, 2010: TV-Film Documentary by CNBC-Africa), shown at luncheons in the Conference Auditorium. Earlier published works include *The Battle For Barrels* (Profile, 2007) and *Empires Of Oil* (Profile 2007) plus *Africa's Future: Darkness To Destiny* (Profile Books 2012), and with co-author Babette van Gessel, *Three Decades in the Long Grass: The Story of Global Pacific & Partners* (Jacana Media, Johannesburg, 2014).

Well over 2,500 senior executives and state oil officials have attended our annual **Scramble for Africa: Strategy Briefing** over the last 16 years, with 250 in attendance in 2014.

Participants benefit from deep understanding of corporate strategies, access to unique knowledge, high-level networking, with Luncheon and Cocktails, prior to our 71<sup>st</sup> *PetroAfricanus Dinner in Africa* (separately bookable).



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### Purchase: African National Oil Companies: Strategy Briefing - £ 750 (Sterling)

Delegates to the 17<sup>th</sup> Scramble for Africa and 22<sup>nd</sup> Africa Upstream may acquire the separate purchase of this updated, informative and complementary Strategy Briefing, crafted in around 600 images by Duncan Clarke, depicting the state of play in Africa's oil game, as shaped by State firms and Government entities. The themes cover key issues and provide data on the emergence of Africa's hydrocarbons, the evolution of state entities and the selective policies in-play.

**Note:** This Strategy Briefing is in download format only, accessible from our e-Conference facility provided for the 22<sup>nd</sup> Africa Upstream Conference, and for authorised delegates only, on special terms, subject to payment received. To purchase, please complete the registration form provided in the 22<sup>nd</sup> Africa Oil Week Conference Brochure. Right of Purchase Reserved. © Global Pacific & Partners | **Contact:** Jerome Svikowsky: jerome@glopac-partners.com

17<sup>th</sup>

# Scramble for Africa

## Strategy Briefing

Cape Town,  
Monday, 26<sup>th</sup> October  
2015

### Highlights

The Strategy Briefing covers inter alia the following issues with significant current and long-term relevance to oil/gas companies, Governments, National Oil Companies, oil and gas investors, licensing agencies, and executives and corporate strategists in Africa's oil & gas industry and business world, notably:

Top to Bottom diagnosis of the strategies, portfolios and shifting competitive interests of over 750 oil/gas companies in Africa

No-holds barred forensic analysis of the policies, politics and initiatives of Africa's Governments and state oil players active on the Continent

Intensive, image-driven discourse on the proliferating numbers of corporate players and their strengths and weaknesses within Africa

Worldwide understanding of the foreign state oil companies in or entering Africa, based on our direct relationships and advisory practice

Critical insights on the diverse portfolios in play for unlocking Africa's oil and gas natural capital, as the continent's primary economic growth driver

Significance of the surge towards resource nationalism in key African countries, for energy/oil-gas investments and corporate oil strategies

Drivers of the competitive corporate game in Africa, and the lunge by Great Powers (China, India, Russia, Europe, Latin), with the rise of state oil entities

The shaping of foreign/domestic oil and gas investment trends Africa-wide, and implications for local and foreign company players alike

Emerging corporate opportunities and state oil/energy bottlenecks (in resource nationalism, infrastructure, capital markets) for Africa's growth path

New entrants, die-hards, the "good, bad and ugly" – from super-majors-to-minnows – now shaping and making Africa's oil future

Intelligence and insight unavailable elsewhere, with rich-content, to reveal the evolving corporate oil and gas landscapes across Africa

### 08:00 Registration & Coffee

#### 08:45 Minnows in Africa: Strategies

Proliferating Corporate Entities, Africa-Wide New Companies, Deals, Acreage, Partners  
Africa's Oil Juniors & Foreign Minnows  
Corporate Oil Quest: Over 500 Companies  
Independents "Born In Africa" (Nigeria, elsewhere)  
The Players: "Good, Bad & Ugly"  
With "Born in Africa" Companies - download

### 10:45 Morning Break

#### 11:15 Worldwide Independents: Africa

Worldwide Companies: From Six Continents  
Large & Small: Producers & Explorers  
Over 75 Significant Upstream Players  
Entry Strategies, Portfolio, Success  
Acreage, Disposals, New Ventures  
Takeovers, Mergers, Partnerships, JV  
Winners, Losers, Failures, Also-Rans  
Future Strategies & Africa Interests

### 13:15 Light Luncheon & Networking

#### 14:15 Super-Independents: Africa Portfolio

Top Dogs: ENI, Repsol, COP, Other  
The 36 Super-Independents: African Oil/Gas  
Corporate Profiles, Strategies, Core Assets  
New Ventures, Exploration Portfolio  
Partnerships, Entries-Exits, Focus, Success  
Directions, Strategy, Investments  
Future Outlook, Consolidations

### 15:45 Afternoon Break

#### 16:00 Super Majors: Foreign-African State Firms

*Super-Majors In Africa; Portfolio*  
ExxonMobil, BP, Shell, Chevron, Total  
*Foreign State Oil Firms: Challenges*  
Chinese, Indian, East & Southeast Asian  
Russian, Latin, Middle Eastern  
Petronas, PTTEP, Petrovietnam, Pertamina  
CNPC-PetroChina, Sinopec, CNOOC  
ONGC-Videsh, GAIL, OIL, IOC  
Petrobras, TPAO, Statoil, Siperol  
Gazprom, Rosneft, Kufpec

### 17:30 Close of Day: 71<sup>st</sup> PetroAfricanus Dinner in Africa

Mount Nelson Hotel  
- Separately Bookable -

*PetroAfricanus*  
CLUB

