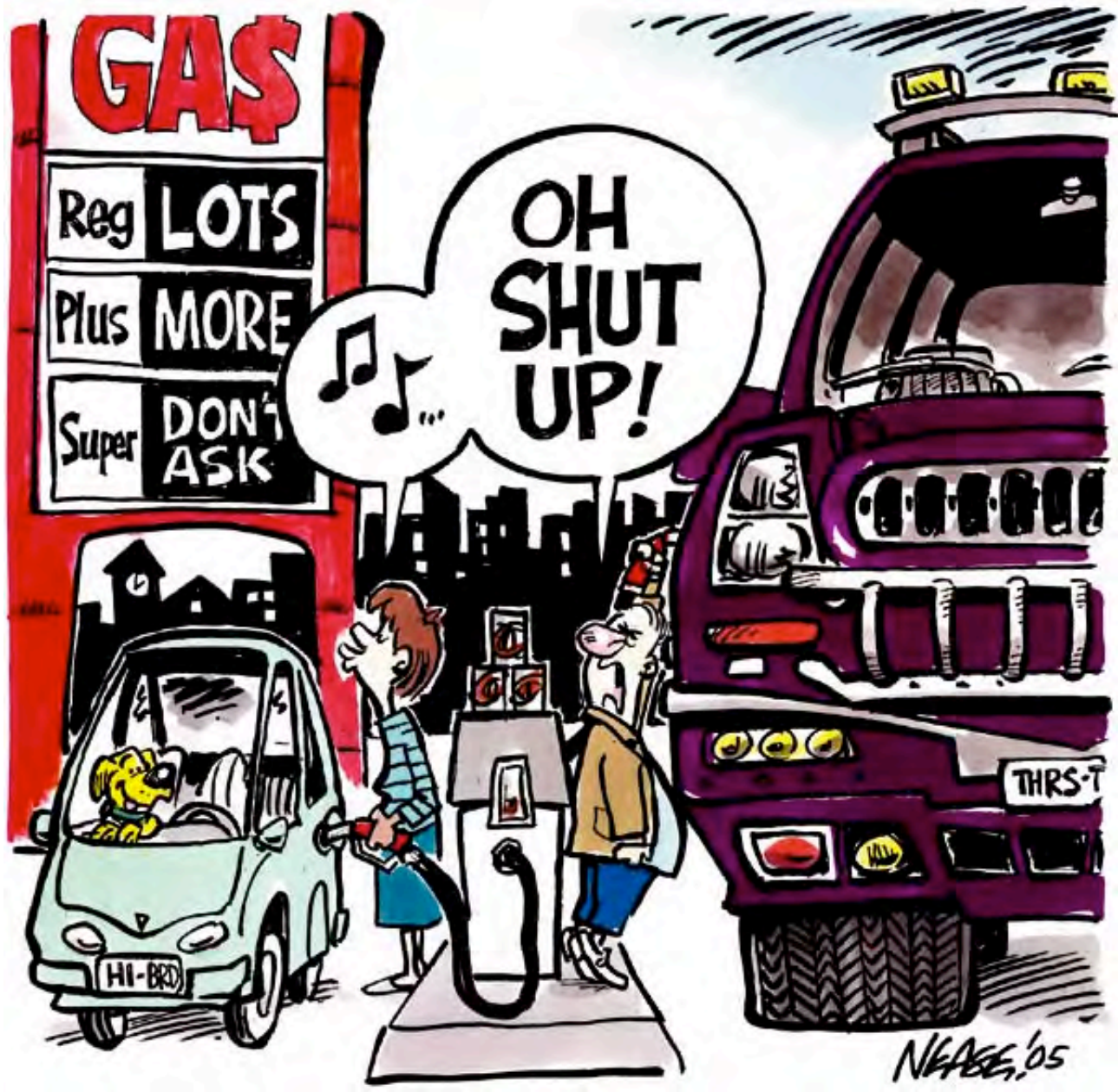


Emerging opportunities in sustainable mobility

University of Michigan
11 June 2008

Niel Golightly
Vice President, Downstream
Sustainable Development &
Communications

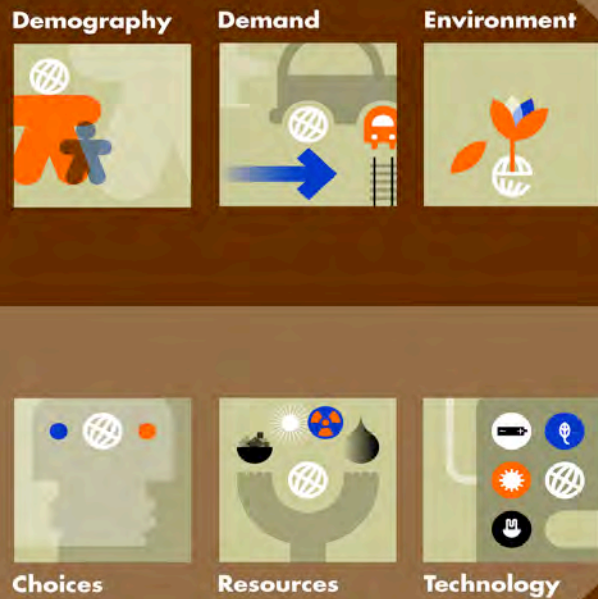




Three Hard Truths

- **Energy demand is surging**
- **Supply is struggling to keep up**
- **Environmental stresses are increasing**

Shell energy scenarios help us to imagine alternative futures



A world of energy security and reactive change

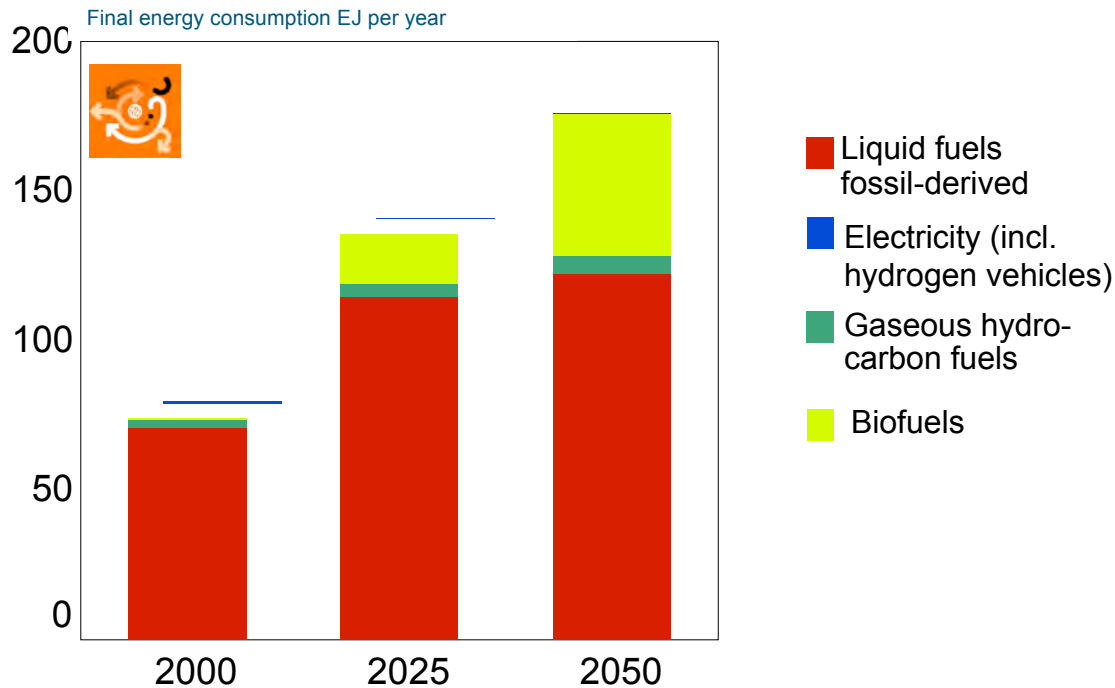
BLUEPRINTS

SCRAMBLE

A world of emerging coalitions and accelerated change

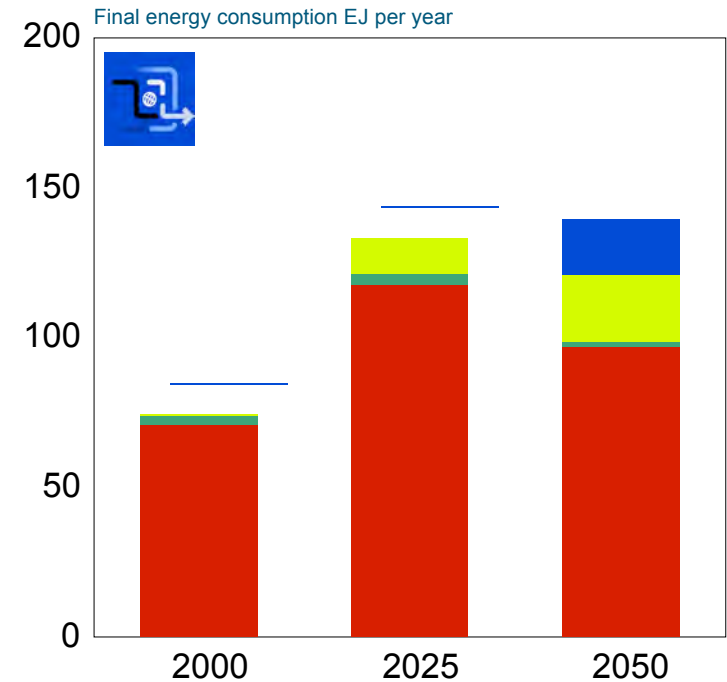
Potential implications for mobility

Scramble



- Gas prices drive vehicle fuel economy
- Growth in 'home grown' biofuels
- Ad-hoc measures to pollution, congestion
- **By 2050, "sustainable" mobility depends on efficient ICEs**

Blueprints



- Mobility planning in urban design, rapid transport systems, partnerships
- Significant increases in efficiency
- Electric vehicles challenge ICEs

By 2050, transport runs on lower carbon liquids and electricity

Timing and mix are key uncertainties

How sustainable transportation means business for Shell

Improving local air quality



Tackling CO2 emissions and improving efficiency



Engagement, partnerships, advocacy



Growth in biofuels

- With or without mandates, biofuels are going to be needed in the future fuel mix

- Therefore we need to:

manage the
sustainability issues of
today's biofuels



We're working with our
suppliers to include
sustainability clauses in
contracts and championing
international standards

and

invest in next generation
biofuels that avoid some of
the pitfalls



We are aggressively
pursuing next
generation
technologies

**Because next generation will take 5-10 years before volumes make an impact,
we need to do both**



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