

Carbon Disclosure Project 2008 – Global Update

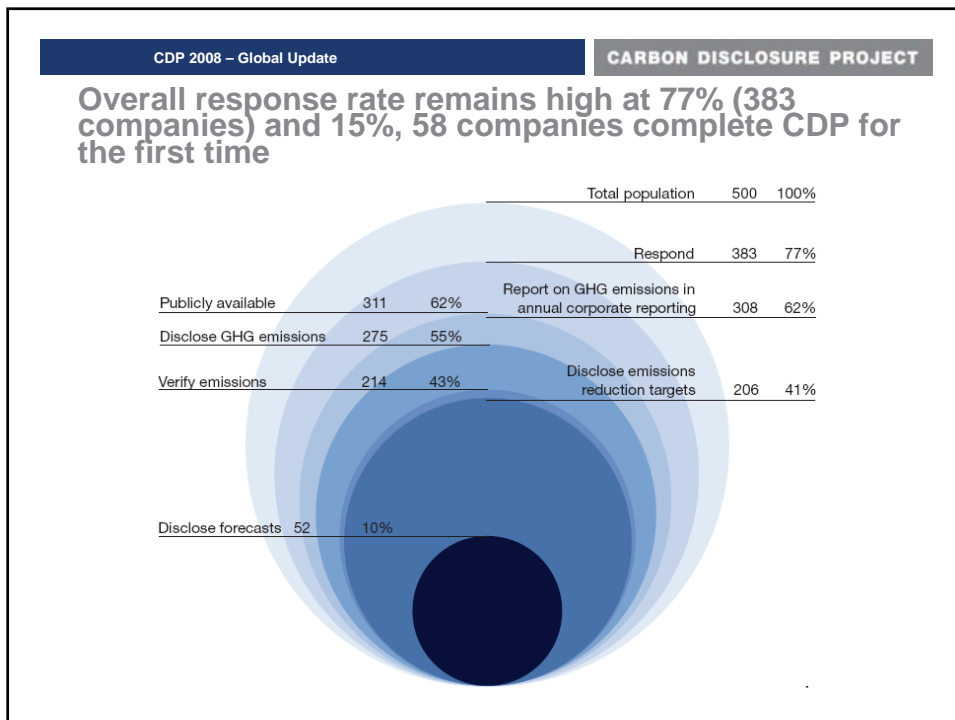
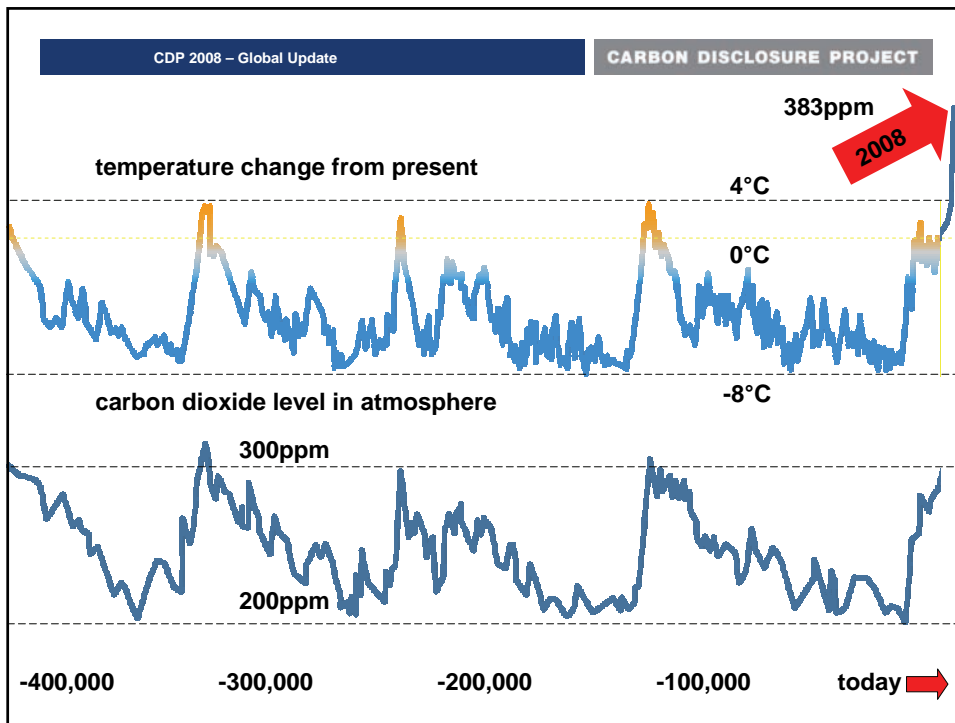
Tom Carnac – Head of Public Sector



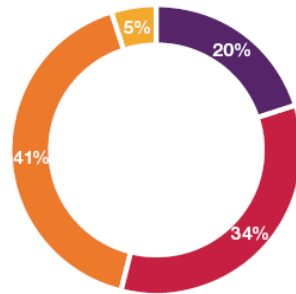
Carbon Disclosure Project 2008 Global Update

- Key findings from the Global 500 Report
- CDP developments in 2008

“To facilitate a dialogue between investors and corporations supported by quality information from which a rational response to climate change will emerge.”



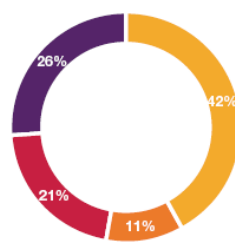
Global 500 saw significant changes in population, with Asian companies displacing those from North America



	Composition of CDP6 Global 500	Change from CDP5
Asia	101	+8
Europe	168	no change
North America	205	-12
Rest of World	26	+4

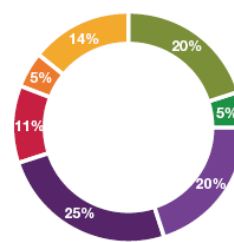
Global 500 becomes more carbon intensive

Non Intensive (n=282)



	Composition of CDP6 Global 500	Change from CDP5
Financial Services	121	-11
Hospitality, Leisure & Business Services	30	-2
Retail & Consumer	58	-4
Technology, Media & Telecoms	73	-3

Intensive (n=218)

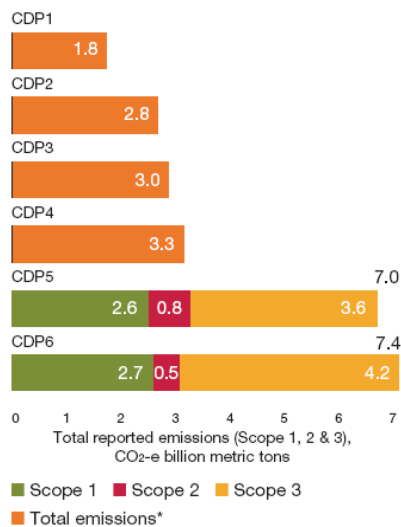


	Composition of CDP6 Global 500	Change from CDP5
Chemicals & Pharmaceuticals	44	+4
Construction & Building Products	11	+4
Manufacturing	43	+1
Oil & Gas	54	+9
Raw Materials, Mining, Paper & Packaging	25	+4
Transport & Logistics	11	-2
Utilities	30	no change

Utilities and financial services sectors lead on disclosure quality but CDLI is not a static group with 50% new entrants

Carbon Intensive Sectors	Non Carbon Intensive Sectors
BASF – Chemicals and Pharma	Barclays – Financial Services
Iberdrola – Utilities	Merrill Lynch & Co – Financial Services
Bayer – Chemicals and Pharma	Munich Re – Financial Services
Exelon – Utilities	National Australia Bank – Financial Services
Nissan Motor – Manufacturing	EMC – Technology, Media and Telecoms
Scottish & Southern – Utilities	

Disclosure of Scope 3 emissions increases although difficulties remain on comparability



Drivers for action:

- Regulation remains a key issue
- Increasing consumer awareness
- Supply chain
- Governance



CDP Developments in 2008

- Global expansion by country continues
- New global partnerships: Merrill Lynch, PricewaterhouseCoopers & Bloomberg
- New projects launched: Supply Chain, Public Procurement & Cities
- CDP hosts the Climate Disclosure Standards Board (CDSB)

In 2008 CDP writes to over 3000 companies through 20 geographic samples and two sector samples. Over 1550 companies respond and as a result 20 reports will be launched around the world.



CDP Data available on Bloomberg

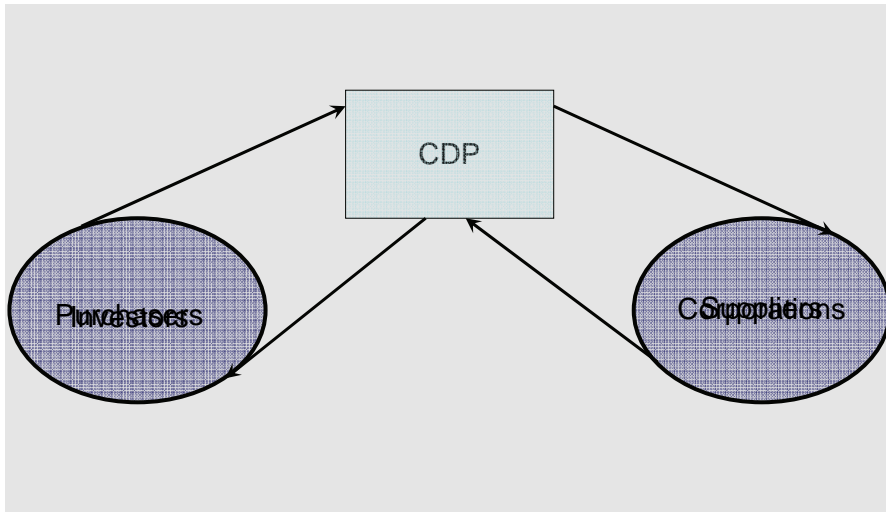
<HELP> for explanation, <MENU> for similar functions. Msg:JESS SINGH

RODSA LN Equity		Carbon Emissions Disclosure - CDP	
		Reporting Year:	2008
ROYAL DUTCH SHELL PLC-A SHS		Intensity (Metric Tons/Million US\$)	
Total Global Emissions (Metric Tons)		Scope 1/Sales	259
Scope 1 Activity Emissions Globally	92,000,000	Scope 1/EBITDA	N.A.
Scope 1 Activity Emissions Annex B	59,000,000	Scope 2/EBITDA	N.A.
Scope 2 Activity Emissions Globally	13,000,000	Emissions by Country (Metric Tons)	
Scope 2 Activity Emissions Annex B	12,000,000	● Scope 1 ○ Scope 2	
Emissions from Disposal of Services	743,000,000		
Emissions from Distribution/Logistics	N.A.		
Emissions from Employee Business Travel	180,000		
Company Supply Chain	N.A.		
Electricity Purchases (Megawatt Hours)		EU Emissions Trading (Metric Tons)	
Global Electricity Use	21,000,000	Year	↓ Allowance Emissions
Global Electricity Use Annex B	20,000,000	2005	23,390,965 21,539,542
Electricity from Renewables	N.A.	2006	23,240,924 20,372,618
Electricity from Renewables - Annex B	N.A.	2007	25,782,367 22,439,661
Total Costs of Energy Consumption (US\$)*	9,000	2008	21,542,028 N.A.
% of Total Operating Costs	N.A.		
% Energy Costs from Renewables	N.A.		

Metric Ton is in CO2 Equivalent * In Millions

Australia 61 2 9777 8600 Brazil 11 5511 3048 4500 Europe 44 20 7330 7500 Germany 49 69 9204 1210 Hong Kong 852 2377 6100 Japan 81 3 3201 5900 Singapore 65 6212 1000 U.S. 1 212 318 2000 Copyright 2008 Bloomberg Finance L.P. 6548-1001-1 22-Sep-2008 15:15:45

– From Investors to Purchasers



2008 CDP Supply Chain Members



– CDP Public Procurement

Represents 15% of GDP in EU

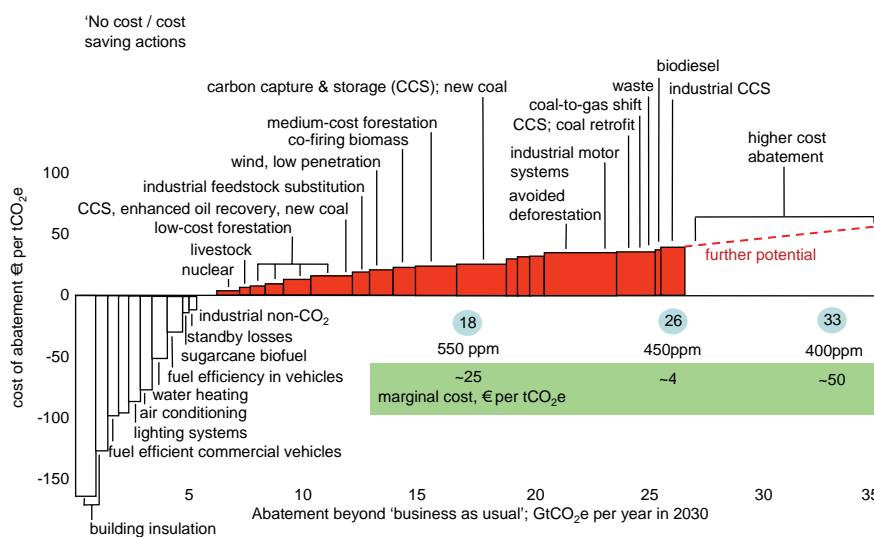
Considerable power to shape the low carbon economy



“Understanding the carbon emissions and policies of our suppliers through our collaboration with CDP will help to embed the sustainability agenda within our procurement decision making.”

British Foreign Secretary David Miliband

Source: McKinsey & Co (Enkvist, Naucler & Rosander)



– CDP Cities Program

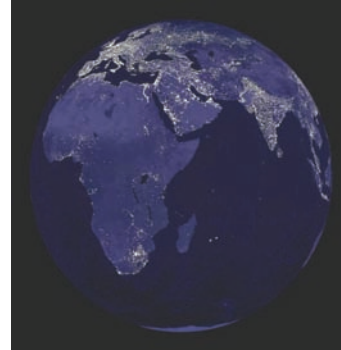
Why Cities?

Mitigation:

Disproportionate impact on the climate: cities cover less than 1% of the planet's surface but consume 80% of total energy

Adaptation:

The worst affects of climate change are likely to be in the world's cities due to density of population and coastal locations



“The struggle to mitigate climate change will be won or lost in cities”

Former Mayor of London Ken Livingstone

– CDP Cities

2008 Pilot



Cities, towns and counties invited to participate

Comparable questions to CDP 2008 with amendments to make questions applicable and new guidance



“ICLEI's partnership with CDP underscores how crucial standards, quantification methods and voluntary reporting are to local climate action”

ICLEI USA Executive Director Michelle Wyman

– CDP Cities
2008 Participants



The City of New York joins the world's leading corporations in providing a complete, accurate accounting of its carbon emissions, the strategies it is employing to mitigate those emissions, and the results of its efforts through CDP

This partnership between the world's major corporations and, increasingly, its cities, highlights the importance of the cooperative action needed to successfully counter climate change.



Mayor Bloomberg, August, 2008

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