

Message

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Sent: 8/5/2019 11:09:34 AM
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Subject: FW: NGO Q2 2019 Summary and Q3 2019 Outlook
Attachments: NGO Analysis and Quarterly Outlook Q2 2019.pdf

All, some interesting developments in NGO action I thought I would share.

Best Regards,

Gretchen

Gretchen H. Watkins
President Shell Oil Company
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From: Donnelly, Rob P SIEP-ERUP
Sent: Tuesday, July 23, 2019 1:34 AM
To: GX SIEP ULT <[REDACTED]@SHELL.com>
Subject: FW: NGO Q2 2019 Summary and Q3 2019 Outlook

All

Relevant after last weeks discussion on reputation and LTO.

- There's a shift in campaigning NGO behavior from targeting vulnerable areas e.g. Arctic or Amazon to increasingly targeting any HC development, the BP North Sea example being the most obvious and recent. I would expect that trend to continue.
- 245 continues to be lightning rod for criticism on business ethics and compliance

Rob

From: ER Corporate SI-ERC
Sent: Monday, July 22, 2019 3:58 PM
To: ER Corporate SI-ERC <[REDACTED]@shell.com>
Subject: NGO Q2 2019 Summary and Q3 2019 Outlook

Dear all,

Please find attached the summary of NGO campaigning in relation to Shell and other IOCs for Q2 2019 and the Q3 2019 forward look. This is based on SIGWatch data and analysis and includes joint observations and insights. ***Please note that this summary reflects NGO activity and issues of particular interest to NGOs, and not general public sentiment or media coverage.***

Headlines to note

- High visibility protests by Extinction Rebellion, Fridays for the Future (school children's strikes) and their allies means climate change has never had more attention from the media and politicians.
- Increasing pressure on the financial sector (banks, funds and insurers) to scale back fossil fuel exposure, which seems to be proving effective.
- Partners – across culture, education, environment – called out by critics of fossil fuels.

Summary

- Shell continues to be the most targeted IOC, followed by Total and Chevron. Exxon and BP are less visible, despite an active Greenpeace campaign against BP drilling in the North Sea.
- Shell continues to get praise for climate initiatives, but at the same time the level of criticism on this topic has also grown. Concerns around business integrity directed at Shell increased for the fourth consecutive quarter.
- Business integrity activism prevalent in North America and Western Europe, especially in the UK and Italy (OPL-245 case in Milan). Less of a focus for the rest of the world. This in part reflects where most activist NGOs are based and active.

Q3 Outlook

- Climate protests expected to hit a summer lull, or at least they will probably be small and symbolic. Scheduled to return strongly from September.
- High risk of 'greenwashing' accusations as IOCs and corporate energy users try to show they are on the right side of the argument.
- Financial sector is vacating coal faster than expected. This will continue to increase pressure to do the same across O&G.
- Expect continued pressure on Shell's cultural relationships and non-industry partners, especially in the UK and Netherlands.
- Developments in OPL245 case likely to create new opportunities for criticism.

Significant Q3 events

- **26 July** Power Beyond Borders activist camp – London, UK.
- **20 September** Global climate strike (a week of actions is planned)..

Please do not hesitate to contact us if you have any questions, feedback or suggestions.

Kind regards,
Stakeholder Relations team, ER Corporate