



Process Industries

Background

Focus

Philosophy

Quaker has broad and deep experience across the entire crude to customer business Downstream footprint.

Functional Practice Areas:

- Fuels & Lubes refining
- Retail & Commercial marketing
- Fuels Supply and Trading
- Crude Production Supply & Trading
- Transportation, Logistics & Distribution
- Chemical production
- Research & Development
- Technology Application & Deployment
- Information technology management
- Capital Appropriation and allocation
- Maintenance
- Operations

Strategy/Business Improvement:

- Strategy/business plan development
- Scenario Planning
- Competitive Intelligence/decision support
- Organizational restructuring
- Performance management
- Benchmarking & best practice work
- Balanced scorecard development
- Business process redesign
- Alliance and JV planning
- Regulatory review, oversight compliance
- Post merger integration
- Project Management



Quaker Client Work

Background

Focus

Philosophy

Relevant selected experience includes the following:

- Developed manpower targets under a free market paradigm for an integrated Eastern European energy company that included 50% manpower reductions, leading to cash flow improvements and pseudo-privatization.
- Developed the organization structure, functional responsibilities, position profiles, and key operating procedures for the Refining Division for the Saudi Arabian National Oil Company and implemented a new structure and procedures.
- Created a strategic analysis for the Indonesian National Oil Company, assessing financial, operational, and management systems to fundamentally improve the performance of the company throughout the archipelago.
- Sold, managed, and delivered an organizational restructuring project at the Board level for the largest oil refinery in the world resulting in significant cost reductions and efficiency improvements. The work was tailored and implemented with significant changes to organization structure, processes and management systems.
- Provided reorganization and reengineering assistance for a realignment of 70% of the human resource assets associated with corporate service functions for the privatization of the Hungarian National Oil Company.



Illustrative Quaker Client Base

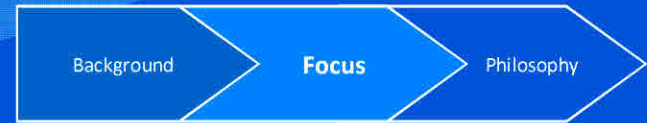


The client base includes logos for the following organizations:

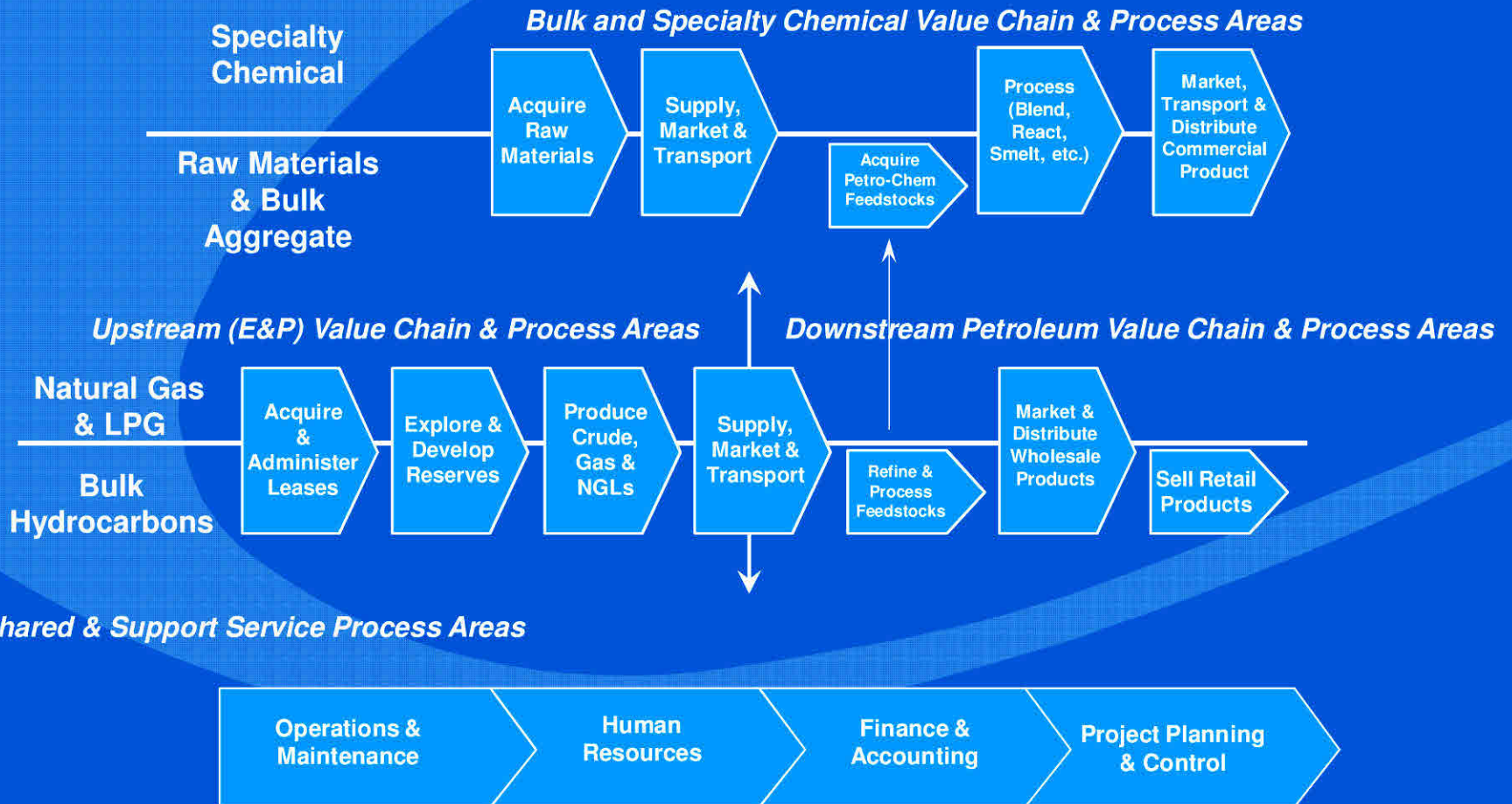
- Valero Energy Corporation
- AspenTech
- China Petrochemical Corporation (SINOPEC)
- Shell
- PEMEX
- REPSOL
- MONITOR GROUP
- EXPERT ALUMNI
- LOTOS
- HMC
- PTROHEMIA
- knowledge reservoir
- Decision Strategies
- Arthur D Little
- Reliance Petroleum Limited
- Honeywell ROSENEFT
- Deloitte
- BAIN & COMPANY
- Great Lakes Chemical Corporation
- BCG
- Kuwait Petroleum Corporation
- PETROL
- accenture
- MOL
- McKinsey & Company
- PetroChina
- ExxonMobil
- NYNAS
- CAR BI PRAGER
- MERCER
- OWENS CORNING
- RIVER LOGIC
- Morgan Stanley
- Qatar Petroleum
- PTT Group
- PRICEWATERHOUSECOOPERS
- PETRONAS
- OLIVER WYMAN
- bp
- OXY
- Unipetrol
- ExxonMobil
- MAXUS
- CITGO
- PETRO-CANADA
- MARATHON ASHLAND Petroleum LLC
- HUNTSMAN CORPORATION
- ConocoPhillips
- IRVING
- petrola
- NOVA
- Agip (Saudi Aramco)
- Shell



Quaker Industry Vertical Focus



Energy Value Chain





Quaker Market Proposition - Integrated Approach



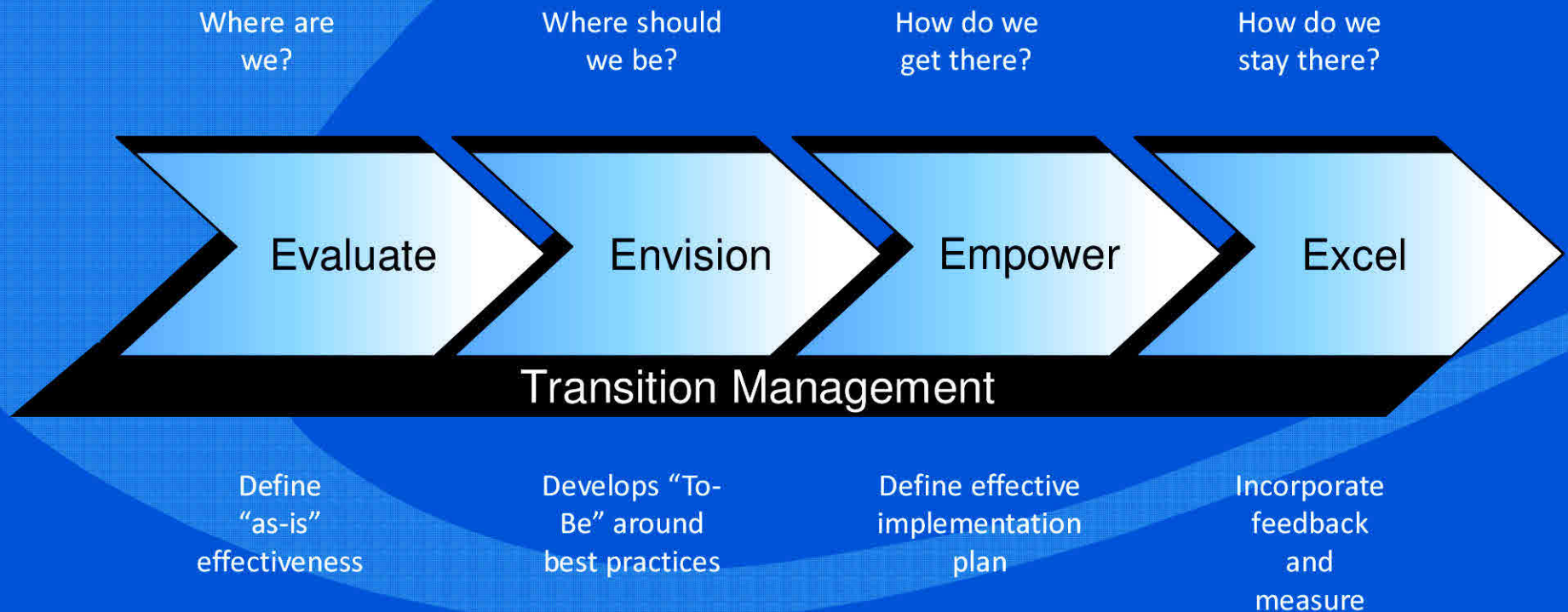
- Clients are Informed Consumers
 - ‘Brand’ in the industry is created by technical and business experience backed by track record (functional and/or industry)
 - The offer being made needs to be distinctive – it cant be ordered out of a catalogue (Not a hammer looking for a nail)
 - You can’t ‘fake’ industry experience or functional knowledge
 - implementation goes beyond the management level to the technical front line
 - You have to be able to objectively articulate to the client something they don’t know and implement something they can’t implement or do it faster
 - Leveraged services will ultimately lead to commodity pricing; the new consulting model has to leverage the client (sustainability) with consultants that have both functional and industry expertise (particularly true in oil & gas)
 - Sustainable fee uplift (differentiation) will only be achieved with work of commensurate value
 - To be successful the work should have leadership of significant depth and breadth of experience (and success) to provide and integrated solution (Don’t throw the baby out with the bathwater)



Quaker Market Proposition - Integrated Approach



Most methodologies have the same general structure, defined below. . .



. . . but that just sets the stage for customized solution value

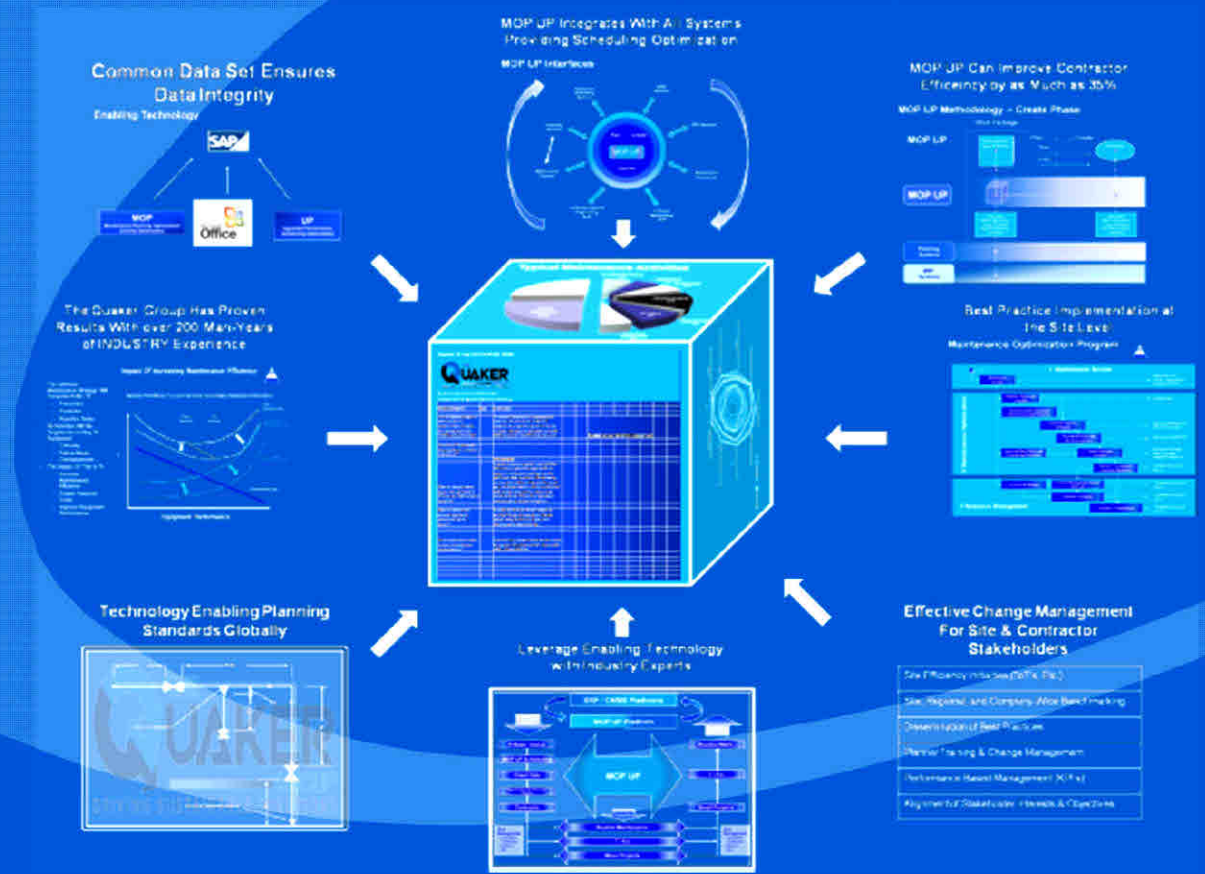


Quaker Market Proposition - Integrated Approach



Value is created where strategy and operations are aligned and sustained . . .

Solution – Unit Rate Productivity: Craft Management



. . . vis-à-vis transparent , disintermediated metrics and management systems