

WHERE IN THE WORLD ARE CANADIAN OIL AND GAS COMPANIES? 2013

Niloo Hojjati

INTRODUCTION

Begun in 2011 as an internal research tool for the development of the Extractive Resource Governance Program, this project seeks to answer the vital question: *Where in the world are Canadian oil and gas companies?* To answer this question, we extract firm-level information for publicly traded Canadian companies in order to establish the location of their activities around the globe.¹ The data collected in the “Where in the World” (hereafter WIW) project are presented through a publicly accessible interactive world map, which allows users to explore a specific country or region over time. This map can be accessed online at <http://www.policyschool.ca/research-teaching/teaching-training/extractive-resource-governance/ergp-map/>. For further information regarding the WIW project, including a comprehensive overview of the methodology, please refer to <http://www.policyschool.ca/wp-content/uploads/2017/06/Where-in-the-World-Hojjati-Horsfield-Jordison-final.pdf>. In addition, summary reports of the annual data collection for the 2011 and 2012 years of analysis are also available at <http://www.policyschool.ca/wp-content/uploads/2017/06/2011-Where-in-the-World-Hojjati-Horsfield-Jordison-final.pdf> and <http://www.policyschool.ca/wp-content/uploads/2017/06/2012-Where-in-the-World-Hojjati-final.pdf>.

This report, as in the earlier reports in this series, provides an account of emerging trends and highlights variations in the level of global activities of Canadian oil and gas companies (hereafter O&G) for the 2013 year of study.² In 2013, a total of 226 Canadian O&G companies engaged in global exploration and

¹ The WIW project examines the global activities of Canadian oil and gas companies in 218 countries spanning seven international regions of analysis. They are as follows: Africa; Asia and Oceania; Central and South America; Eurasia; Europe; Middle East; and North America. For a complete list of countries examined in the WIW project, refer to Appendix A.

² The author would like to thank School of Public Policy research assistant Brian McCann for his contributions to the WIW project, specifically for sharing in the collection of 2013 data that are reflected in the contents of this paper.

service activities in 99 countries worldwide. The Middle East and Europe experienced the greatest increase in the concentration of Canadian exploration and production (E&P) companies. Meanwhile, the international presence of Canadian O&G service companies continued to grow in several countries, including Colombia, Mexico, and the United Kingdom.

This report begins with a regional overview of the international presence of Canadian E&P companies, followed by a summary of country-level activities. The report then continues by providing the same analysis for Canadian O&G service companies.

I. WHERE IN THE WORLD ARE CANADIAN EXPLORATION AND PRODUCTION COMPANIES?

The international presence of Canadian³ E&P companies extends to 84 countries in 2013. In total, 172 E&P companies engaged in the search, recovery, and production of natural gas and crude oil reserves worldwide. Among the 172 companies, 57 recorded some level of global production.⁴ Canadian E&P companies were responsible for 0.61 per cent of the world's production of oil, natural gas liquids (NGL), and natural gas, producing a total amount of 825,271 barrels of oil equivalent per day (boe/d) outside of Canada.⁵ This a decrease of approximately five per cent in comparison to production levels in the previous year. The following section presents a detailed account of the international activities of Canadian E&P companies in 2013 in terms of two measures: scale of activity and total level of production. It begins by providing a brief overview of Canadian exploration activities within a regional context, followed by a summary of country-specific results. Finally, highlights of notable E&P company activities conclude this section.

A. Regional Overview

The regional concentration of Canadian E&P companies in 2013 is similar to the previous year; however, there are important variations in each region that must be distinguished. Table 1 presents the number of active Canadian E&P companies in each region of analysis for the year 2013, while outlining the regional presence of companies for the previous year of study as way of comparison.

³ For the purposes of the WIW project, an O&G company is defined to be “Canadian” according to two selection criteria: (i) the company must have its headquarters (or head office) in Canada; and (ii) the company must be publicly traded on a Canadian exchange.

⁴ Information about international operations is not uniformly represented across regulatory filings for similar firms in the oil and gas industry. For instance, in some cases an E&P company might indicate it is active in a particular region or country, but might not specify more detailed information about its activities, such as production levels.

⁵ The aim of the WIW project is to examine the international presence of Canadian companies in foreign countries. As such, this project does not provide information related to the activities of Canadian companies within Canada's borders, such as the annual levels of oil, NGL, and natural gas produced within Canada.

TABLE 1 NUMBER OF CANADIAN E&P COMPANIES BY REGION, 2012 AND 2013

Region	2012			2013		
	Ranking	Number of Active E&P Companies	Number of Countries Activity Is Spread Across	Ranking	Number of Active E&P Companies	Number of Countries Activity Is Spread Across
Africa	2	37	28	2	39	29
Asia & Oceania	4	24	12	4	30	17
Central & South America	3	35	9	3	37	9
Eurasia	7	5	3	7	4	3
Europe	5	21	13	5	30	16
Middle East	6	10	4	6	14	7
North America (Excluding Canada)	1	82	3	1	78	3
Total Worldwide (Excluding Canada)	N/A	167	72	N/A	172	84

Source: "Where in the World Are Canadian Oil and Gas Companies?" (2013).⁶

As can be observed by Table 1, North America continues to serve as the primary destination for Canadian exploration activities, however the number of active companies has decreased by five per cent. The most substantial expansion of the international presence of Canadian E&P activities occurred in Europe and Asia and Oceania, two regions that are host to a combined 30 per cent of all active companies in 2013. The presence of Canadian companies has also slightly increased in the remaining regions, with the exception of Africa, which experienced a minor drop in the number of active companies.

To illustrate the extent of the impact of Canadian exploration activities in the international arena, Table 2 displays the level of production of oil, NGL, and natural gas by Canadian companies as a share of total production levels in each region for the 2012 and 2013 years of study.

⁶ "Where in the World Are Canadian Oil and Gas Companies?" University of Calgary School of Public Policy, <http://www.policyschool.ca/research-teaching/teaching-training/extractive-resource-governance/ergp-map/>. For further background information regarding the WIW project, including the methodology and sources of data extraction, see Niloo Hojjati, Kai Horsfield, and Shantel Jordison, "Where in the World are Canadian Oil and Gas Companies? An Introduction to the Project" University of Calgary School of Public Policy Research Paper (volume 13) (2017).

TABLE 2 OIL, NGL AND NATURAL GAS PRODUCTION LEVELS OF CANADIAN E&P COMPANIES BY REGION, 2012 AND 2013

Region	2012			2013			
	Ranking	Total Production (boe/d)	Total Production by Canadian Companies (boe/d)	Ranking	Total Production (boe/d)	Total Production by Canadian Companies (boe/d)	Share of Total Production That Is Canadian (%)
Africa	4	12,835,582	80,828	4	12,173,096	62,351	0.51%
Asia & Oceania	5	16,115,035	36,672	5	16,067,047	36,386	0.23%
Central & South America	1	10,063,062	192,868	1	10,122,449	196,497	1.94%
Eurasia	7	25,947,930	281	6	26,397,188	9,824	0.037%
Europe	3	8,080,656	126,516	3	7,795,353	115,042	1.48%
Middle East	6	37,117,517	3,231	7	37,316,336	2,835	0.008%
North America (Excluding Canada)	2	23,673,201	434,382	2	24,878,766	402,337	1.62%
Total Worldwide (Excluding Canada)	N/A	133,832,983	874,777	N/A	134,750,236	825,271	0.61%

Source: "Where in the World Are Canadian Oil and Gas Companies?" (2013).⁶

As shown in Table 2, the contribution of Canadian exploration activities in terms of worldwide production levels of oil, NGL, and natural gas is the highest in Central and South America yet again in 2013. The share of Canadian production has fallen slightly in Europe and Africa in comparison to the previous year; however, the two regions have maintained the same third- and fourth-place ranking as in 2012. Meanwhile, in Eurasia, while the presence of Canadian E&P companies has decreased by some 20 per cent, the share of production of oil, NGL, and natural gas by Canadian companies has increased significantly.

B. Country Overview

For the third consecutive year, the United States and Colombia serve as principal hosts for the international operations of Canadian E&P companies. The highest concentration of Canadian exploration activities in Europe occurred in the United Kingdom, where the presence of companies increased by 80 per cent in comparison to the previous year. Meanwhile, on the African continent, Tunisia continues to serve as the primary destination for Canadian E&P companies. The level of Canadian exploration activities in the remaining top-five-ranking countries is similar to the previous year and is outlined in Table 3 below.

TABLE 3 TOP FIVE COUNTRIES BY NUMBER OF CANADIAN E&P COMPANIES, 2012 AND 2013

Country	2012		2013	
	Ranking	Number of Active E&P Companies	Ranking	Number of Active E&P Companies
Argentina	5	6	3	9
Australia	3	9	3	9
Brazil	4	7	4	8
Colombia	2	22	2	20
Peru	5	6	5	7
Tunisia	3	9	4	8
United Kingdom	6	5	3	9
U.S.	1	80	1	77
Total Worldwide (Excluding Canada)	N/A	167	N/A	172

Source: "Where in the World Are Canadian Oil and Gas Companies?" (2013).⁶

To establish the significance of the role of Canadian exploration activities in local oil and gas industries around the globe in 2013, Table 4 highlights the five countries with the highest share of total oil, NGL, and natural gas production relative to total production levels in each country, while also providing the country production levels in 2012 for comparison. As can be observed in Table 4, for the second consecutive year, the highest share of oil, NGL, and natural gas production by Canadian E&P companies occurred in Colombia, the United Kingdom, Tunisia, and Bangladesh. However, it is worthwhile to note that the share of Canadian production has fallen by a percentage point in the top three countries in comparison to the previous year. Lastly, oil, NGL, and natural gas production resulting from Canadian exploration activities has increased by 0.02 percentage points relative to the previous year in New Zealand, with the country now ranking fifth (it previously ranked seventh in 2012).

TABLE 4 TOP FIVE COUNTRIES BY PERCENTAGE OF CANADIAN OIL, NGL AND NATURAL GAS PRODUCTION AS A SHARE OF TOTAL COUNTRY PRODUCTION, 2012 AND 2013

Country	2012			2013			
	Ranking	Total Production (boe/d)	Total Production by Canadian Companies (boe/d)	Ranking	Total Production (boe/d)	Total Production by Canadian Companies (boe/d)	Share of Total Production That Is Canadian (%)
Bangladesh	4	343,269	9,330	4	356,804	9,793	3%
Colombia	1	1,136,700	186,658	1	1,207,765	184,311	15%
New Zealand	7	115,096	2,201	5	112,104	2,162	2%
Tunisia	3	97,193	4,169	3	92,391	2,606	3%
United Kingdom	2	1,908,669	119,566	2	1,787,561	93,934	5%
Total Worldwide (Excluding Canada)	N/A	133,832,983	874,777	N/A	134,750,236	825,271	0.61%

Source: "Where in the World Are Canadian Oil and Gas Companies?" (2013).⁶

C. Company Highlights

To understand the breadth of the international presence of Canadian E&P companies around the world, Table 5 presents the top-three-ranking companies in terms of number of active country operations in 2013, as well as the corresponding levels in the previous year. As shown by the table, for the third consecutive year Talisman Energy Inc. is responsible for the highest number of country operations, having increased its presence to four additional countries since 2012. The second position on the list is occupied by a number of companies, namely Heritage Oil Corp.; Husky Energy Inc.; Niko Resources Ltd.; and Pacific Rubiales Energy Corp., all of which have operations in seven countries worldwide. Among these companies, Heritage Oil Corp. and Husky Energy Inc. have experienced the most significant surge in their level of country operations, expanding their presence in Asia and Oceania and the African continent. The remaining leading companies with the largest number of country operations are outlined in Table 5 below.

TABLE 5 TOP THREE CANADIAN E&P COMPANIES BY NUMBER OF COUNTRY OPERATIONS, 2012 AND 2013

Company	2012		2013	
	Ranking	Number of Countries with Recorded E&P Activity	Ranking	Number of Countries with Recorded E&P Activity
Heritage Oil Corp.	8	1	2	7
Husky Energy Inc.	6	3	2	7
Niko Resources Ltd.	3	6	2	7
Pacific Rubiales Energy Corp.	3	6	2	7
Serinus Energy Inc.	6	3	3	6
Simba Energy Inc.	2	7	3	6
Suncor Energy Inc.	4	5	3	6
Talisman Energy Inc.	1	11	1	15
Vanoil Energy Ltd.	5	4	3	6
Vermilion Energy Inc.	6	3	3	6
Total Worldwide (Excluding Canada)	N/A	72	N/A	84

Source: "Where in the World Are Canadian Oil and Gas Companies?" (2013).⁶

Table 6 highlights the top five Canadian E&P companies according to levels of total in-country company production of oil, NGL, and natural gas in 2013, while outlining production levels in the 2012 year of study.

TABLE 6 TOP FIVE CANADIAN E&P COMPANIES BY LEVEL OF OIL, NGL, AND NATURAL GAS PRODUCTION, 2012 AND 2013

Company	2012			2013		
	Ranking	Total Company Production (boe/d)	Number of Countries With Recorded Production ⁴	Ranking	Total Company Production (boe/d)	Number of Countries With Recorded Production ⁴
Encana Corp.	1	281,933	1	1	247,667	1
Enerplus Corp.	8	25,148	1	5	39,817	1
Pacific Rubiales Energy Corp.	4	97,657	2	3	128,814	2
Suncor Energy Inc.	5	41,500	1	4	76,400	2
Talisman Energy Inc.	2	134,043	3	2	166,578	5
Total Worldwide (Excluding Canada)	N/A	874,777	22	N/A	825,271	25

Source: "Where in the World Are Canadian Oil and Gas Companies?" (2013).⁶

As observed in Table 6, Encana Corp. and Talisman Energy Inc. have the greatest level of company production, similar to the previous year. The third company of significance is Pacific Rubiales Energy Corp., which has had an increase of 32 per cent in company production levels in comparison to 2012. Suncor Energy Inc. now ranks fourth (it previously ranked fifth in 2012), while Enerplus Corp. has had an increase of 14,669 boe/d in production levels in the United States.

II. WHERE IN THE WORLD ARE CANADIAN OIL AND GAS SERVICE COMPANIES?

In 2013, 54 Canadian³ O&G service companies conducted international operations in 59 countries around the world. This section provides a summarized account of the international presence of Canadian O&G service companies in 2013. It begins with a regional description of the level of service activities, followed by a brief overview of Canadian operations on a country basis. Lastly, highlights of notable service companies are presented.

A. Regional Overview

For the second consecutive year, the vast majority of the international operations of Canadian O&G service companies occurred in North America and Asia and Oceania. Central and South America had a 67-per-cent increase in comparison to the previous year and ranks as the third significant region. Meanwhile, Europe serves as the fourth most significant destination, where the international presence of active service companies has more than quadrupled compared to levels in 2012. Meanwhile, two regions have experienced a decrease in the number of Canadian O&G service companies, namely the Middle East and Africa, which rank fifth and seventh respectively. Table 7 below outlines the number of active Canadian service companies in the remaining regions for this year of study, including the 2012 level of regional activity.

TABLE 7 NUMBER OF CANADIAN O&G SERVICE COMPANIES BY REGION, 2012 AND 2013

Region	2012			2013		
	Ranking	Number of Active Service Companies	Number of Countries Activity Is Spread Across	Ranking	Number of Active Service Companies	Number of Countries Activity Is Spread Across
Africa	4	10	13	7	7	12
Asia & Oceania	2	14	8	2	20	12
Central & South America	5	9	6	3	15	11
Eurasia	6	4	2	6	8	2
Europe	7	2	2	4	11	13
Middle East	3	11	7	5	9	6
North America (Excluding Canada)	1	51	2	1	42	2
Total Worldwide (Excluding Canada)	N/A	61	40	N/A	54	59

Source: Where in the World Are Canadian Oil and Gas Companies? (2013)⁶

B. Country Overview

Similar to 2012, the United States, Mexico, and Australia served as the top three destinations for Canadian O&G service companies in 2013. In Colombia, the number of Canadian service companies tripled in comparison to the previous year, with the country ranking third. Russia and China are among the other countries that saw a surge in the presence of active companies, ranking fourth and fifth respectively. Lastly, while there were zero companies present in the United Kingdom in 2012, the country served as host to nearly 12 per cent of companies engaged in international operations in 2013. The top-five ranking countries with the largest presence of Canadian O&G service companies in 2013, including their level of activity in the previous year of study is recorded in Table 8 below.

TABLE 8 TOP FIVE COUNTRIES BY NUMBER OF CANADIAN O&G SERVICE COMPANIES, 2012 AND 2013

Country	2012		2013	
	Ranking	Number of Active Service Companies	Ranking	Number of Active Service Companies
Australia	3	10	3	12
China	9	1	4	7
Colombia	6	4	3	12
Mexico	2	16	2	15
Russia	7	3	5	6
United Kingdom	-	-	5	6
U.S.	1	50	1	37
Total Worldwide (Excluding Canada)	N/A	61	N/A	54

Source: Where in the World Are Canadian Oil and Gas Companies? (2013)⁶

C. Company Overview

To demonstrate the international presence of key players among the Canadian O&G service companies in the WIW project, Table 9 below presents the top three service companies in accordance to the number of country operations. As can be observed, for the second consecutive year Major Drilling Group International Inc. has the highest level of international operations among all Canadian O&G service companies in the WIW project. The second-highest-ranking company is Shawcor Ltd., which significantly expanded its international presence in 2013, with operations in three additional regions, including Central and South America, Eurasia, and Europe. Lastly, while Enerflex Ltd. has increased its operations twofold in comparison to 2012 levels, the company retains its previously held position as the third- ranked Canadian service company.

TABLE 9 TOP THREE CANADIAN O&G SERVICE COMPANIES BY NUMBER OF COUNTRY OPERATIONS, 2012 AND 2013

Company	2012		2013	
	Ranking	Number of Countries with Recorded Service Activity	Ranking	Number of Countries with Recorded Service Activity
Enerflex Ltd.	3	7	3	13
Major Drilling Group International Inc.	1	11	1	19
Shawcor Ltd.	5	5	2	16
Total Worldwide (Excluding Canada)	N/A	40	N/A	59

Source: Where in the World Are Canadian Oil and Gas Companies? (2013)⁶

CONCLUSION

In 2013, 226 Canadian O&G companies engaged in global exploration and service activities in 99 countries worldwide, compared to 228 active Canadian companies in 85 countries in 2012, and 255 companies in 106 countries in 2011. The most substantial expansion of the international presence of Canadian E&P companies occurred in the Middle East and Europe. In particular, there was a considerable expansion in the role of Canadian O&G companies in the United Kingdom. Meanwhile, the greatest contribution of Canadian exploration activities in terms of production levels occurred in Central and South America, where Canadian E&P companies accounted for 15 per cent of total oil, NGL, and natural gas production in Colombia. Russia and China served as key jurisdictions for Canadian service companies once again in 2013, following a decline in the level of activities in the previous year. For further information and country profiles, please visit the accompanying website <http://www.policyschool.ca/research-teaching/teaching-training/extractive-resource-governance/ergp-map/>.

APPENDIX A: COUNTRIES OF ANALYSIS

This section outlines the list of countries examined in the WIW project. The countries of analysis are organized according to the designation system employed by the U.S. Energy Information Administration (EIA).

TABLE A1 COUNTRIES OF ANALYSIS BY U.S. EIA DESIGNATION SYSTEM

Region: Africa	Region: Asia & Oceania	Region: Central & South America
Algeria	Afghanistan	Antarctica
Angola	American Samoa	Antigua and Barbuda
Benin	Australia	Argentina
Botswana	Bangladesh	Aruba
Burkina Faso	Bhutan	Bahamas, The
Burundi	Brunei	Barbados
Cameroon	Burma (Myanmar)	Belize
Cape Verde	Cambodia	Bolivia
Central African Republic	China	Brazil
Chad	Cook Islands	Cayman Islands
Comoros	Fiji	Chile
Congo (Brazzaville)	French Polynesia	Colombia
Congo (Kinshasa)	Guam	Costa Rica
Côte d'Ivoire (Ivory Coast)	Hong Kong	Cuba
Djibouti	India	Dominica
Egypt	Indonesia	Dominican Republic
Equatorial Guinea	Japan	Ecuador
Eritrea	Kiribati	El Salvador
Ethiopia	Korea, North	Falkland Islands (Islas Malvinas)
Gabon	Korea, South	French Guiana
Gambia, The	Laos	Grenada
Ghana	Macau	Guadeloupe
Guinea	Malaysia	Guatemala
Guinea-Bissau	Maldives	Guyana
Kenya	Micronesia	Haiti
Lesotho	Mongolia	Honduras
Liberia	Nauru	Jamaica
Libya	Nepal	Martinique
Madagascar	New Caledonia	Montserrat
Malawi	New Zealand	Netherlands Antilles
Mali	Niue	Nicaragua
Mauritania	Pakistan	Panama
Mauritius	Papua New Guinea	Paraguay
Morocco	Philippines	Peru
Mozambique	Samoa	Puerto Rico
Namibia	Singapore	Saint Kitts and Nevis
Niger	Solomon Islands	Saint Lucia
Nigeria	Sri Lanka	Saint Vincent/Grenadines
Reunion	Taiwan	Suriname
Rwanda	Thailand	Trinidad and Tobago
Saint Helena	Timor-Leste (East Timor)	Turks and Caicos Islands
Sao Tome and Principe	Tonga	Uruguay
Senegal	Tuvalu	Venezuela
Seychelles	U.S. Pacific Islands	Virgin Islands, British
Sierra Leone	Vanuatu	Virgin Islands, U.S.
Somalia	Vietnam	
South Africa	Wake Island	
Sudan and South Sudan		
Swaziland		
Tanzania		
Togo		
Tunisia		
Uganda		
Western Sahara		
Zambia		
Zimbabwe		

Source: U.S. Energy Information Administration website, "Countries," <http://www.eia.gov/countries/#allcountries>.

TABLE A2 COUNTRIES OF ANALYSIS BY U.S. EIA DESIGNATION SYSTEM (CONTINUED)

Region: Eurasia	Region: Europe	Region: Middle East	Region: North America
Armenia	Albania	Bahrain	Bermuda
Azerbaijan	Austria	Iran	Greenland
Belarus	Belgium	Iraq	Mexico
Estonia	Bosnia and Herzegovina	Israel	Saint Pierre and Miquelon
Georgia	Bulgaria	Jordan	United States
Kazakhstan	Croatia	Kuwait	
Kyrgyzstan	Cyprus	Lebanon	
Latvia	Czech Republic	Oman	
Lithuania	Denmark	Palestinian Territories	
Moldova	Faroe Islands	Qatar	
Russia	Finland	Saudi Arabia	
Tajikistan	France	Syria	
Turkmenistan	Germany	United Arab Emirates	
Ukraine	Gibraltar	Yemen	
Uzbekistan	Greece		
	Hungary		
	Iceland		
	Ireland		
	Italy		
	Luxembourg		
	Macedonia		
	Malta		
	Montenegro		
	Netherlands		
	Norway		
	Poland		
	Portugal		
	Romania		
	Serbia		
	Slovakia		
	Slovenia		
	Spain		
	Sweden		
	Switzerland		
	Turkey		
	United Kingdom		

Source: U.S. Energy Information Administration website, "Countries," <http://www.eia.gov/countries/#allcountries>.

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Niloo Hojjati is a Research Associate in the Extractive Resource Governance Program and Tax and Economic Growth Program at The School of Public Policy at the University of Calgary. As part of the Extractive Resource Governance Team, she has worked with governments of numerous resource-rich jurisdictions around the world to assist them in developing sustainable extractive policies through executive training and applied research initiatives. Niloo holds a Master's degree in Public Policy from the University of Calgary, with her capstone focusing on the potential application of Small Modular Reactors (SMRs) for electricity generation in the Northwest Territories. She also holds a Bachelor's degree in Economics from the University of Calgary. Her current areas of research include natural resource governance and economic development, with a focus on the role of sovereign wealth funds in resource-rich jurisdictions.

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