



InfluenceMap

Big Oil's Real Agenda on Climate Change 2022

An analysis of oil and gas supermajors' public communications, business operations and policy engagement on climate

September 2022

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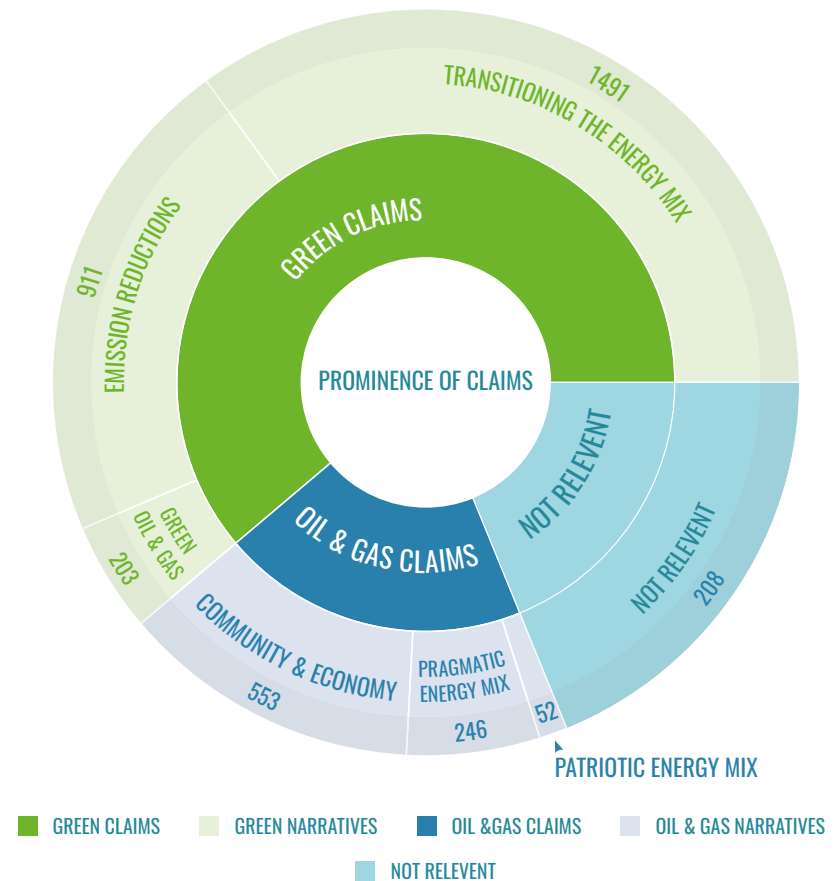
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InfluenceMap sought feedback from the five companies covered in the report on the analysis prior to publication, and obtained it from Shell, BP and TotalEnergies. It is noted that corporate logos are occasionally utilized in the graphics associated with the analysis in this report, as is common practice in public facing releases of this kind. This in no way implies agreement and/or endorsement by the companies concerned with the report's content.

Executive Summary

- Extensive analysis of the public communications of five 'supermajors' oil companies (Shell, BP, TotalEnergies, Chevron, and ExxonMobil) finds that they are spending hundreds of millions of dollars each year on a systematic strategy to portray themselves as positive and proactive on the climate change emergency. This is found to be inconsistent with the companies' plans for capital investment in their business. It is also found to be misaligned from the detailed policy engagement activities of the companies and their industry associations on climate change.
- The supermajors' public communication channels were analyzed for the most prominent claims being made by the companies. The analysis identified various messaging strategies designed to highlight the companies' own positive climate change action, as well as different narratives to support the role of oil and gas in the energy mix.
- Across the 3,421 individual evidence items of public communication analyzed from the five companies from 2021, 60% contained at least one green claim, while only 23% contained claims promoting oil and gas (with another 23% deemed not to contain claims relevant to either). Claims highlighting the companies' support of, or involvement with, efforts to transition the energy mix were by far the most popular type of green claim.
- None of the companies assessed disclosed the strategies that inform their public messaging on climate change, nor the resources dedicated to related activities. Using cost estimates based on the number of communications

Number of Claims Deployed by the Supermajors in their 2021 Public Communications



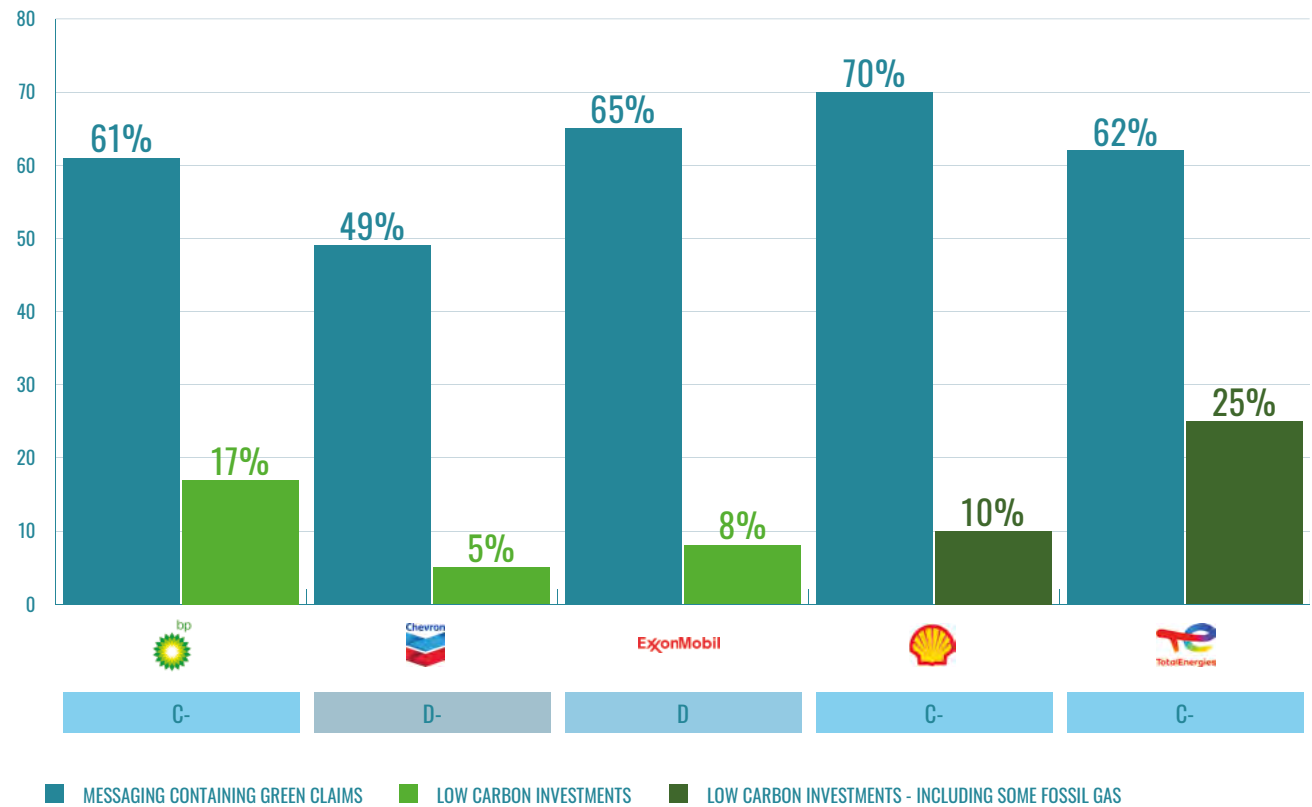
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and media staff the companies employ, InfluenceMap's analysis suggests that the companies are spending around \$750 million each year cumulatively on climate-related communication activities. This should be viewed as a conservative estimate of the total resources allocated to climate-related PR and marketing, as it does not include the use of any external agencies for PR, marketing, and advertising.

- In contrast to the predominance of 'green claims', only 12% of the five companies' 2022 capital expenditure (CAPEX) is forecasted to be dedicated to 'low carbon' activities, while several of the companies' oil and gas production appear set to increase up to 2026 from a 2021 baseline.¹ Such production forecasts appear to

¹ CAPEX figures are taken from information disclosed directly by the company. It is noted that investments dedicated to transitioning away from fossil fuels are likely lower, as several companies include fossil gas-related activities in their 'low carbon' CAPEX. Projected oil and gas output to 2026 has been taken from *Asset Resolution*. *Asset Resolution (AR)* provides asset-based data widely used by financial institutions and regulators to measure financial portfolios and companies' climate alignment, emissions, related climate risks and opportunities, among many other use-cases. AR utilizes industry standard databases to map physical assets to companies and financial securities.

Big Oil's Green Claims vs Green Investments



Graph comparing the percentage of Big Oil's 2021 public communications containing positive messages about the company on climate change vs the percentage of projected 'Low Carbon' investments in 2022 CAPEX per company. Each company's LobbyMap Grade is also included, assessing lobbying alignment with the Paris Agreement.

significantly overshoot the recommendations in the International Energy Agency's Net Zero Emissions by 2050 Scenario (NZE).

- The prominence of the supermajors' pro-climate public communications also appears misaligned from the supermajors' lobbying activities. InfluenceMap found none of the companies have aligned their climate policy engagement activities with the goals of the Paris Agreement. While Shell, TotalEnergies, and BP rank a C-, indicating a mix of both pro and anti-climate advocacy, ExxonMobil and Chevron rank a D and D- respectively, indicating predominantly oppositional policy engagement.
- The research found evidence of all supermajors bar TotalEnergies engaging policymakers directly to advocate for policies encouraging the development of new oil and gas in 2021-22. The research also found evidence of all supermajors bar Chevron having lobbied policymakers to dilute renewable energy-focused policies through demanding the inclusion of fossil gas. InfluenceMap's tracking indicates that none of the supermajors have lobbied consistently in favor of methane emissions reduction regulations since 2021, instead taking mixed or negative positions on the details of specific regulations. This is despite the importance of methane mitigation being a key claim from the industry and top line support for the development of methane regulation.

- At the same time, the supermajors retain a dense and global network of industry associations globally, which are highly active in their opposition to Paris Aligned climate policies, including American Petroleum Institute (F), FuelsEurope (D), Canadian Association of Petroleum Producers (E), and the Australian Petroleum Production & Exploration Association (E+).
- In 2021-22, this network of industry associations has lobbied against climate policies globally across different levels of government, targeting both state level and federal policies, through a variety of means including direct engagement with political leaders, the use of the courts to prevent climate action, and vast disinformation campaigns which have played out across social media. This opposition falls across numerous policy streams including methane regulations, carbon pricing, policies to promote electrification in transport and buildings, and policies to transition the energy mix away from fossil fuels towards renewables.

Glossary

CAPEX - Capital Expenditure (CAPEX) is the funds spent by a company to acquire, maintain, or improve its physical assets, such as property, plants, or equipment. CAPEX numbers have been taken from the companies' own reporting and disclosure.

Forecast Production - Projected oil and gas output and renewable capacity to 2026 has been taken from [Asset Resolution](#). Asset Resolution provides asset-based data widely used by financial institutions and regulators to measure financial portfolios' and companies' climate alignment, emissions, and related climate risks and opportunities. Asset Resolution utilizes industry-standard databases to map physical assets to companies and financial securities.

Green Claims – A category of claims made in company communications that highlight support, investments, or any other form of commitment to emissions reduction activities or transitioning the energy mix, and/or which reference fossil fuels as 'green' or 'low-carbon'. Based on a taxonomy developed by [Miller and Lellis' \(2016\)](#).

Marketing - Defined by the [American Marketing Association](#) as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large”. The US multinational consulting firm [Cognizant](#) describes oil and gas marketing in particular as “the methods and processes energy companies use to raise awareness of their organizations, establish their brand, and drive customers and prospects toward doing business with them”. It is noted that the

term marketing is sometimes used in the context of oil and gas companies to refer to a wider set of operations covering activities associated with the trading, distribution, and retail of oil and gas (e.g., operating a petrol service station). For the purposes of this report, InfluenceMap uses the term more narrowly to cover aspects of marketing that involve communications, branding and advertising activities.

Net Income (Profit) - Net income, or net profit, is the amount of accounting profit a company has left over after paying off all its expenses.

Oil & Gas Claims - Claims made in company communications that promote the importance of oil and gas in general or in relation to specific investment or projects, with reference to their positive impact on the economy, society and/or nation states. Based on a taxonomy developed by [Miller and Lellis' \(2016\)](#).

Public Communications – Any messaging over company-owned communication channels that is used to inform the public or media, covering marketing, public relations, and public policy engagement functions.

Policy Engagement – Defined based on the 2013 UN Global Compact [Guide for Responsible Corporate Engagement in Climate Policy](#) to mean a range of activities that inform or influence climate policy, including direct lobbying of policymakers, marketing and advertising, financial contributions, and expert input into policy working groups

Public Relations (PR) - Largely *understood* as “the set of techniques and strategies related to managing how information about an individual or company is disseminated to the public, and especially the media”. Distinguished from marketing by the focus on the public image of the company, rather than efforts to promote a specific product or set of products.

‘Renewable’ and ‘Low-Carbon’ Capex - For this analysis, InfluenceMap uses the companies’ own reporting and disclosure on the portion of total CAPEX dedicated specifically to ‘renewable’ or ‘low-carbon’ activities. It is noted that these exact definitions are often opaque, likely diverge between companies, and often include technologies such as fossil gas.

Revenue - Revenue is the money generated from normal business operations, calculated as the average sales price times the number of units sold. It is the top line (or gross income) figure from which costs are subtracted to determine net income. Revenue is only sale proceeds, while income or profit incorporate the expenses to generate revenue and report the net earnings (*Investopedia*).

Supermajors – A group of the largest multinational, investor-owned oil and gas companies (ExxonMobil, BP, Shell, TotalEnergies, Chevron). Chosen based on size as per the Forbes 2000 list, excluding majority state-owned entities.

“

Extensive analysis of the public communications of five 'supermajors' oil companies finds that they are spending hundreds of millions of dollars each year on a systematic strategy to portray themselves as positive and proactive on the climate change emergency.

”

1. Introduction

1.1 Background

In August 2021, the UN climate science body, the Intergovernmental Panel on Climate Change (IPCC) released its report '*Climate change 2021: the Physical Science Basis*'. UN Secretary-General António Guterres described the findings as "*a code red for humanity*". The report found that post-industrial global warming is expected to hit 1.5°C in the early 2030s and will continue to warm unless net zero CO2 emissions are reached around the early 2050s. Furthermore, it states that without a strengthening of climate policies beyond those implemented by the end of 2020, GHG emissions are projected to lead to a median global warming of 3.2°C by 2100. A similar conclusion was drawn by the UN Environment Programme's *Emissions Gap Report* (Oct 2021), which found that with current policies, warming is estimated to be 2.7°C by 2100.

The IPCC has identified "opposition from status quo interests" and "incumbent" fossil fuel interests "exerting political influence" over the policymaking process as a key reason for the lack of progress on climate policy globally (*AR6, WG3, Mitigation of Climate Change, April 2022*). More pointedly, the report found "a number of corporations that are involved in the supply chain of both upstream and downstream of fossil fuel companies, make up the majority of organizations opposed to climate action."

The IPCC report also discussed how the fossil fuel industry delayed climate action through their "unique access to mainstream media via advertisements, shaping narratives of media reports", and the use of "targeted lobbying and doubt-inducing media strategies". On advertising in particular, the IPCC highlighted "corporate advertisement and brand building strategies that may also

attempt to deflect corporate responsibility to individuals or aim to appropriate climate care sentiments in their own brand-building". It listed the "Regulation of advertisement" as an example of a policy measures that can help shift development pathways.

Regulators and policymakers have also become increasingly concerned with the influence achieved through corporate advertising. For example:

- In December 2019, the Italian multinational oil and gas company Eni was fined *5 million euros* by the Italian Competition Authority for its ad campaign disseminating "false and omissive information." Dutch advertising regulators also found Shell in breach of its advertising regulations in 2021-2022 for misleading claims in multiple advertising campaigns, including: the '*Drive CO2-Neutral*' campaign, its '*CO2 Compensation*' claim, *wrongly labelling* its hydrogen production as 'green', and claiming to be the '*biggest driver of the energy transition*'.
- In the US, ExxonMobil, Chevron, American Petroleum Institute, Shell Oil, BP, and other major oil producers are currently facing *multiple lawsuits*, initiated by both civil society groups and state-level government, on topics covering consumer fraud – misleading the public about their products and their hazards – and/ or misleading investors about the risks of greenhouse gas emissions on their businesses. TotalEnergies also faces a *lawsuit* in France for allegedly misleading advertising claims related to net zero, gas, and biofuels.

- City councils have started to introduce and pass *motions* to ban fossil fuel advertising from public spaces, including in Amsterdam (Netherlands) and Liverpool (United Kingdom), while the French Government has passed a *law* that bans ads for fossil fuel energy, such as petrol and diesel, to be implemented Summer 2022, which will extend to the most polluting cars in 2028.
- In March 2022 the European Commission proposed *stricter regulation* of climate-related advertising, including a ban on 'net zero' claims which are not supported by clear, objective and verifiable commitments and targets, and a ban on the use of generic advertising claims such as 'environmentally friendly' or 'carbon-neutral' unless clear specification is given or excellent environmental performance demonstrated. In June 2022, the UK Advertising Standards Authority (ASA) identified a number of *issues* to be followed-up on related to environmental claims in the energy sector, including 'claims by high-emitting companies, which focus on narrow environmentally beneficial aspects of their businesses but may not provide a complete picture of their overall environmental impact' among others.

1.2 About This Report

In 2019, InfluenceMap released *Big Oil's Real Agenda on Climate Change*, which found that in the three years following the Paris Agreement, the five largest publicly-traded oil and gas majors (ExxonMobil, Royal Dutch Shell, Chevron, BP, and Total) had invested over \$1Bn of shareholder funds on misleading climate-related branding and lobbying. The report found these efforts included large and misleading PR and advertising campaigns to paint a climate-positive brand, while lobbying efforts and business operations were overwhelmingly in conflict with the goals of the Paris Agreement.

Since this time, the five companies have faced significant and consistent pressure from their shareholders, via investor engagement process such as the Climate Action 100+ initiative and numerous shareholder resolutions, with demands focused on the need for increased disclosure and alignment of business strategies and practices with the Paris Agreement's goals. In 2021, activist investor Engine No.1 *successfully fought* to install three directors on the board of ExxonMobil, to push the company to address its climate impact.

In view of this pressure, as well as the *limited, meaningful government policy progress* on climate since 2019, this report applies an adapted and improved methodology to reassess the public communications, policy engagement, and business operations of the five oil and gas supermajors. The analysis identifies heightened efforts from the companies' communications operations to portray themselves as positive and proactive on climate change. In addition, and despite some marginal improvements, the research shows that this high-level messaging remains inconsistent with their plans for capital investments in their business and government policy influencing activities.

1.3 Methodology Summarized

The analysis highlights the ongoing and potentially enormous resources channeled by these companies into public messaging strategies that appear to misrepresent their business operations and real policy agenda on climate change. The report presents and compares three different analyses. A detailed overview of the methodologies used for all three can be found in [Appendix A](#) of this report.

- **Public Communications:** The first chapter provides an analysis of the companies' public-facing communication channels used for marketing, public relations, and related purposes over the course of 2021, assessing the proportion of the output that is relevant to climate change, as well as the frequency and spread of different narratives. To do this, InfluenceMap has analyzed over 3000 pieces of evidence from 2021, making it the most extensive analysis of the supermajors' public communications to date. This includes media channels on the companies' corporate websites, social media, and secondary websites designed as blogs or intended for outreach purposes.² A full list of data sources used per company can be found in [Appendix B](#).
- **Business Operations:** The second chapter cites several mainstream business metrics and compares these against the findings on each companies' public communications. 'Low carbon' and/or "renewable" capital expenditure

² In order to make an assessment of the proportion of public communications dedicated to pro-climate narratives, InfluenceMap only analyzed sources which had complete data sets (i.e. a full list of press releases published in 2021). Data-sources with partial or incomplete publicly available coverage of company output over the course of 2021 were excluded from this analysis.

(CAPEX) figures have been estimated based on information in company disclosures, whereas data on future projected oil, gas, and renewables output to 2026 has been taken from [Asset Resolution](#)³.

- **Policy Engagement:** The final chapter focuses on key trends related to direct engagement by the companies and their key industry associations with policymakers on climate change between 2021-22. It compares the companies' detailed positions and engagement on climate-related regulations with their high-level public communications.

The methodologies utilized for these analyses draw upon the independent interrogation of both the companies' direct disclosures, as well as third-party data sources. They have been developed in lieu of detailed reporting from the companies on these topics.

There have been some improvements in the companies' climate disclosures in recent years. For example, Shell, BP and TotalEnergies have produced additional reporting on their climate policy engagement activities, posting a number of consultation responses on their websites under 'Advocacy' sections. However, disclosures on the spending and strategy that underpins the company's public communication strategies remains largely non-existent. A summary of each company's disclosure across the topics that are the focus of this can be found in Table 1 (a more detailed table outlining the level of disclosure from the companies can be found in [Appendix C](#)).

³ *Asset Resolution* provides asset-based data widely used by financial institutions and regulators to measure financial portfolios and companies' climate alignment, emissions, related climate risks and opportunities, among many other use-cases. *Asset Resolution* utilizes industry standard databases to map physical assets to companies and financial securities.

Table 1: Summary of Supermajors' level of disclosure

Company	Public Communications	Policy Engagement	Business Operations
Shell PLC	Limited disclosure	Partial disclosure	Partial disclosure
BP	Limited disclosure	Partial disclosure	Partial Disclosure
TotalEnergies	Limited disclosure	Partial disclosure	Partial Disclosure
Chevron	Limited disclosure	Partial disclosure	Limited disclosure
ExxonMobil	Limited disclosure	Limited disclosure	Limited disclosure

Focusing exclusively on five supermajors, it is likely the findings represent only a fraction of the global fossil fuel sector's climate messaging operations. The findings raise serious and persistent questions for regulators and the companies' shareholders, as well as PR and advertising agencies, the media, and social media platforms that work with the companies. It is noted that this analysis focuses on the companies' main corporate communications channels and thus is focused on their North American/European communications. Future research will focus on how the companies communicate in the Global South.

A breakdown of each company's public communications, lobbying, and business operations, and where the key areas of misalignment exist, can be found in additional resources [here](#).

“ The findings raise serious and persistent questions for regulators and the companies' shareholders, as well as PR and advertising agencies, the media, and social media platforms that work with the companies. ”

2. Public Communications

2.1 Introduction

This chapter analyses the PR and marketing activities of the supermajors on climate through an assessment of their public communications over the course of 2021. Following an explanation of the methodologies used, two sets of findings are presented.

- The first set of findings show that majority (62%) of the supermajor's public messaging activity to be climate-relevant (both pro-climate and pro-fossil fuel). Using this analysis, the research estimates that, cumulatively, the companies are spending around \$750 million per annum on internal staff costs for climate-related communications alone.
- The second set of findings provide a detailed assessment of the messaging strategies deployed by the companies in their public communications, identifying a systematic pattern of green claims, most focused on the issue of the energy transition. At the same time, references to the oil and gas aspects of the companies' business appear to be downplayed in their public communications.

Methodology

For this report, public communications are defined as messaging over any company-owned communication channel that is used to inform the public or media, covering marketing, public relations, and public policy engagement functions. This includes company and CEO social media (Facebook, Instagram, Twitter, YouTube, and LinkedIn where available), corporate websites including media centers/newsrooms (press releases, reports, country pages, speeches, magazines depending on contents of media center/newsroom), and secondary websites designed as blogs or intended for outreach purposes.

Using this definition, the research aimed to collect as much data on the company's public communications as possible over the course of a single year (January – December 2021). Such communications are considered a proxy for the wider marketing, PR and public policy engagement activities that produce them, and analysis of these public communications offers insights into the companies' marketing and PR strategies. Following this logic, two separate assessment process were applied to each item of public communication evidence collected:

- **Assessment 1. Climate Relevance:** The first assesses the extent to which the companies' communication activities focus on climate-relevant topics (with each item of evidence assessed on a scale between 0.0 for no relevance to 1.0 for full relevance, covering both pro-climate and pro-fossil fuels messaging). The analysis factors in how central the topic covered in each evidence item is to climate change, and how prevalent the climate-relevant topics were in each evidence piece.

- **Assessment 2. Messaging Strategies:** The second, separate, analysis assessed this output to understand the most frequently used narratives deployed by the companies.

The latter analysis uses a taxonomy that includes four broad narrative types ('Claims') based on *Miller and Lellis's (2016)* work looking at audience responses to ads from fossil fuel companies. Each evidence piece can contain more than one claim and all evidence pieces were analyzed for the full range of narratives. As such, the percentages given for the presence of claims in evidence pieces do not add up to 100% and should be read as the percentage of evidence items which contained the claim in question rather than the percentage of overall claims. For this report, these narratives have been categorized in the following way:

“ The research suggests a systematic misalignment between the companies' business models and how these are being representing to the public, with the supermajors seemingly misrepresenting their primary business operations by overemphasizing energy transition technologies. ”

Table 2: Categories and Narratives under Public Communications Analysis

Category	Narratives
Green Claims	Climate Solutions: Claims highlighting support, investments or other forms of commitment to emissions reduction activities, transitioning the energy mix, or fossil fuels as 'green' or 'low-carbon' solutions. These claims can relate to either the company's own operations or its position on 'climate solutions' in/for wider society.
Pro-Oil and Gas Claims	<p>Community & Economy Claims about the benefits of oil and gas or the oil and gas industry/company to economies national or local, jobs, philanthropy, and social issues such as gender equality or sustainable development</p> <p>Pragmatic Energy Mix Claims about the benefits of oil and gas for affordability, reliability and maintaining quality of life (for example through the use of oil and gas to develop plastic-based products such as toothbrushes, etc.)</p> <p>Patriotic Energy Mix Claims about the benefits of oil and gas or the oil and gas industry/company to energy security, energy independence, or energy identities/histories</p>

Table 3 provides some examples of the types of content assessed and how it was assessed by InfluenceMap using the above-described methodology.

Table 3: Example of Analysis Conducted on Public Communications

Comms. Type	Comms. Channel	Example (link to evidence)	Assessment 1: Climate Relevance	Assessment 2 : Messaging Strategies
Social Media	Facebook (Organic content)	'100 million metric tons – what's that look like? It's the amount of CO2 we plan to annually capture and store near Houston in subsurface geologic formations, and it's more soccer balls than you could imagine' (Facebook Video , ExxonMobil, 30th November 2021)	1.0 (reflecting the entire evidence piece was about the green claims identified)	Green Claims: Emissions Reductions (<i>CCUS</i>)
CEO Social Media	CEO Instagram	'I'm marking 30 years at @bp_plc today – feels like a while since I signed my contract' (Instagram Post , bernardlooney_bp, 9th September 2021)	0 (reflecting the piece contained no claims related to climate)	Other: Not Relevant to Study
Corporate Media Centre	Feature Story	'Investing in the Community' is a feature story including the following statements: 'We do this by supporting science, technology, engineering and math (STEM) education through numerous programs and strategic partnerships. We support local schools and other organizations to advance STEM education opportunities in Kern, Fresno and Monterey Counties', 'Chevron was the #1 property tax payer in Kern County, #3 property tax payer in Monterey County, and #3 property tax payer in Fresno County in 2020', 'In 2022, Chevron employed over 800 full-time employees', and 'In 2020, Chevron contributed over \$6 million to non-profits and community organizations' amongst others. (investing in the community ', Chevron, 28th July 2021)	0.8 (reflecting that the evidence emphasizes the positive impact of an oil and gas company to a local company, and that such claims made up the main focus of the evidence piece).	Pro Oil & Gas Claims: Community & Economy (<i>jobs and tax contributions, philanthropy</i>)
Corporate Media Centre	News article	In an article about a co-organized data challenge, TotalEnergies included a small section on the energy transition and renewable energy: "The aim of this challenge was to reveal innovative approaches to data processing to provide answers to the challenge of predicting the production of wind farms. A real case example pertaining to the energy transition and renewable energies – a sector to which both TotalEnergies and Air Liquide are strongly committed. "We wanted to remind people of the important role of data science in creating innovative solutions that solve the challenges of the energy transition" (A Data Challenge to rethink inter-company cooperation and encourage the emergence of innovative solutions ', Article, TotalEnergies, 20th December 2021)	0.2 (reflecting that a green claim was identified, and it accounted for a minor point in the overall evidence piece)	Green Claims: Transitioning the energy mix (<i>energy transition, renewables</i>)

<p>Corporate Media Centre</p>	<p>Blog Post</p>	<p>'The potential of this initiative could increase the use of hydrogen, which may help decarbonize the area's industrial sector. Hydrogen would be delivered to customers to help reduce emissions from domestic heating, industrial processes and transportation, and CO2 would be captured and shipped to a secure offshore storage location. This could also attract significant investment in the community, support existing employment and stimulate the creation of local jobs.</p> <p>This initiative is a key part of ExxonMobil's plan to advance climate solutions while providing the energy and products modern society demands." (<i>Exploring the potential for a hydrogen hub in southern England</i>, energyfactor blog post, ExxonMobil, 8th December 2021')</p>	<p>1.0 (reflecting the entire evidence piece was about the green claims and pro-oil and gas claims identified)</p>	<p>Green Claims: Transitioning the Energy Mix (<i>Hydrogen</i>)</p> <p>Pro Oil & Gas Claims: Community & Economy (<i>jobs and investment into community</i>)</p>
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2.2 Supermajors Spend on Climate-Related PR and Marketing

InfluenceMap analyzed a total of 3,421 evidence pieces across a range of public communication channels in 2021 to understand the proportion of the supermajors' public communications that focused on climate-relevant topics (covering both pro-climate and pro-fossil fuel messaging). The overall climate-relevance of the public communications of the five companies was 62%. A company breakdown of climate relevance can be found in Table 4.

Using this analysis, an estimate can be made on the scale of the companies' resources dedicated to climate-related public communication activities. Following the steps set out below, InfluenceMap finds that the five companies are cumulatively spending around \$750 million each year on internal staff costs related to climate relevant communications alone.

Table 4: Average Climate Relevance per Company

Company	Overall Climate Relevance
BP	58%
Chevron	62%
ExxonMobil	76%
Shell	67%
TotalEnergies	60%
Total	62%

To develop this estimate, InfluenceMap used the number of staff employed by the companies for 'Media and Communications' purposes as listed on LinkedIn.com (recorded as of July 2022). An average was developed for ExxonMobil as this category was not included on ExxonMobil's LinkedIn page. This generated a figure of 7,826 staff for the five supermajors employed in media and communication roles. This did not include staff numbers in categories such as 'Arts and Design', 'Marketing' or 'Community and Social Services', although these roles may also be related to public communications. Using average staff costs, this equated to an estimated total spend of \$1.2 billion on internal staff costs.

Using InfluenceMap's climate-relevance analysis, an estimate of the proportion of this spending that is climate relevant can be made (62%). Based on internal staff costs, this equates to an estimated \$750 million spent on climate-relevant public communications in 2021 by the 5 supermajors.

Table 5: Estimated Climate Relevant Spend based on Internal Staff Numbers using LinkedIn

Expense item	Total Staff Number (as of July 2022)	Total Staff Cost (Per Annum)	% Climate Relevance of this Spend	Climate Relevant Internal Media and Communications Spend, (Per Annum) (\$)
Internal Communications and Media Staff	7,826	\$1.2B	62%	~ \$750m
Explanation	Employee numbers based on data provided by companies' LinkedIn.com profiles, under the 'People' tab, listed under 'Communications and Media' ⁴ .	The total salary of communications and media staff is calculated by multiplying the total staff number by the average salary for a 'Public Relations Specialist' ⁵ . To give total staff costs this is subsequently multiplied by 2.7, representing the total cost of an employee to a company. ⁶	Climate Relevance is taken from InfluenceMap's detailed analysis of the companies' 2021 public communications, described above	Climate-relevant communications and media spend is calculated by taking 62% of the total staff cost

⁴ ExxonMobil's LinkedIn page does not list staff numbers for 'Communications and Media', as the company appears to categorise its staff differently. For this calculation, InfluenceMap assigned ExxonMobil the average number of Communications and Media staff numbers from the other four supermajors. Some companies had additional staff numbers for categories including 'arts and design' (BP) and 'community affairs', which appear to be related to public communications. Including these categories would increase the estimated spend.

⁵ The American Petroleum Institute's 2018 'Oil and Gas Career Guide' list the average 'Public Relations Specialist' salary in the industry as \$58,020

⁶ Based on [research](#) by Joseph Hadzima, Sr. Lecturer at MIT Sloan School, the total cost of an employee to a company is 2.7X salary

These calculations should be viewed as a best-attempt estimation of the resources allocated to climate-relevant communications by the five supermajors based on internal staff costs. It should also be viewed as a conservative estimate of the actual resources allocated to climate-related communications as it does not include the use of any external agencies for PR, marketing, and advertising. For example, Professor Robert Brulle's [research](#) into the drivers of Big Oil's promotional advertising alone found that between 2008 and 2016, corporate advertising expenditures for Big Oil were on average around \$217 million a year.

Additionally, the [Deloitte 28th CMO Survey](#) (February 2022) found that companies in the energy sector reported spending on average 1.78% of their revenue on marketing activities a year. For 2021, the five supermajors reported a cumulative revenue of just over \$1 trillion, which would 'which would generate an estimate for climate-relevant marketing spend into the billions. However, as there is a significant deal of variation in the definition of 'marketing' for the oil and gas sector, it is possible this marketing spend extends to product specific services, for example, running service stations. It has not been possible to improve on this estimate further in this analysis, due to the lack of transparent information provided by the companies on the topic.

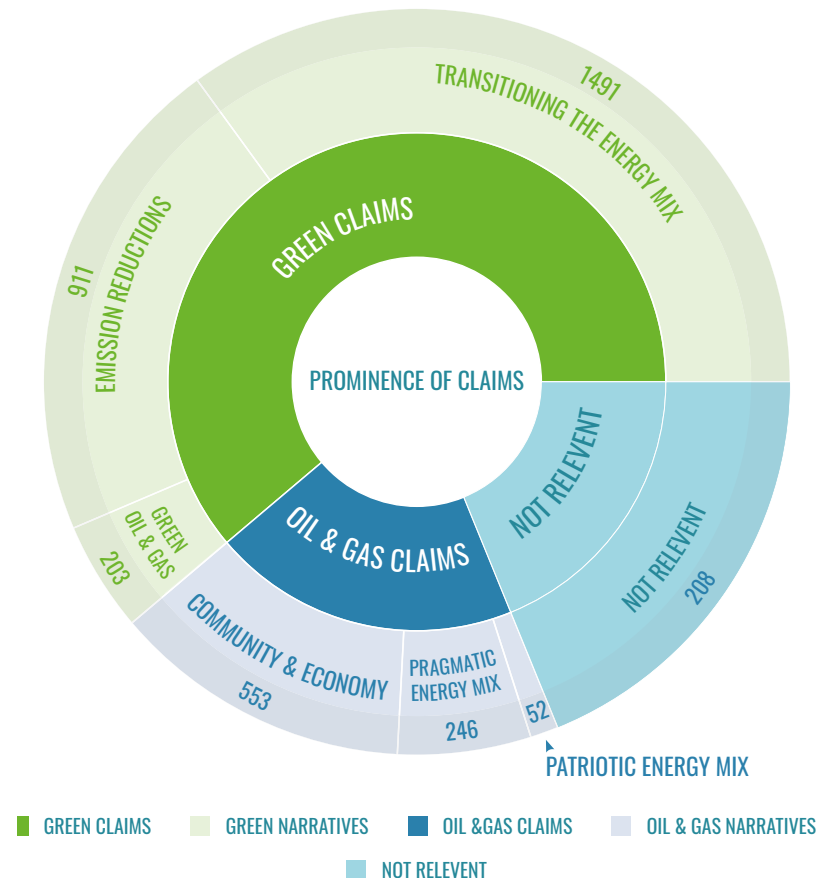
2.3 Analysis of Messaging Strategies

In analyzing the evidence pieces for different narratives, InfluenceMap found that overall, 60% of the public communication evidence was found to contain green claims, while only 23% promoted oil & gas claims. A further 23% of the public communication evidence assessed did not contain claims that were relevant to either category.⁷ A breakdown can be found in Diagram 1.

The analysis therefore identified two broad trends related to the use of climate-related narratives in the five companies' public communications, to which the remainder of the chapter is dedicated.

- Consistent promotion of the companies' climate credentials, particularly related to efforts to transition the energy mix
- A comparatively limited use of claims promoting benefits of oil and gas or the oil and gas industry

Diagram 1: Number of Claims Deployed by the Supermajors in their 2021 Public Communications



⁷ The percentages of green claims, oil & gas claims, and not relevant claims do not add up to 100% because some evidence pieces contained both green claims and oil & gas claims.

The Prominence of Green Claims

The evidence shows that the supermajors have engaged in an extensive communications campaign to promote themselves as pro-climate by using 'green claims', with 60% of all analyzed public communications containing such claims. Green claims here include marketing, PR and public policy related communications that focus on:

- Reducing greenhouse gas emissions (includes communications on emissions reduction targets, CCS, offsets, in both company operations and emissions reductions in wider society)
- Transitioning the energy mix (includes communications on renewables, decarbonizing transport, hydrogen, biofuels, in both company operations and transitioning the energy mix in wider society)
- Promoting fossil fuels as climate or clean energy solutions, (such as calling LNG or fossil gas 'low-carbon', in both company operations and in relation to the role of 'green' fossil fuels in wider society)⁸.

Table 6 shows the overall number and percentage of green claims per company.

⁸ This type of communication did not include the promotion of fossil gas-based products such as blue hydrogen, or blending, for example blending biomethane with fossil gas to create a lower carbon gas. These were captured under 'Transitioning the energy mix' category.

Table 6: Number and Percentage of Evidence Pieces Containing 'Green Claims'

Company	No. of evidence items containing 'Green Claims' in 2021	Evidence pieces containing 'Green Claims' (%)*
Shell	258 (out of 370)	70
ExxonMobil	215 (out of 329)	65
TotalEnergies	692 (out of 1125)	62
BP	579 (out of 957)	61
Chevron	314 (out of 640)	49
Total	2058 (out of 3,421)	60

*Percentage here refers to the proportion of the total number of evidence items assessed which contained the claims in question. Each item of evidence assessed might contain more than one type of claim, while some items of evidence contained no relevant claims.

When analyzing the evidence pieces, InfluenceMap categorized the green claims according to 1) claims about emissions reductions; 2) claims about transitioning the energy mix; and 3) claims about fossil fuels as climate solutions (green oil & gas). Diagram 2 shows the split per company between these three types of green claim.

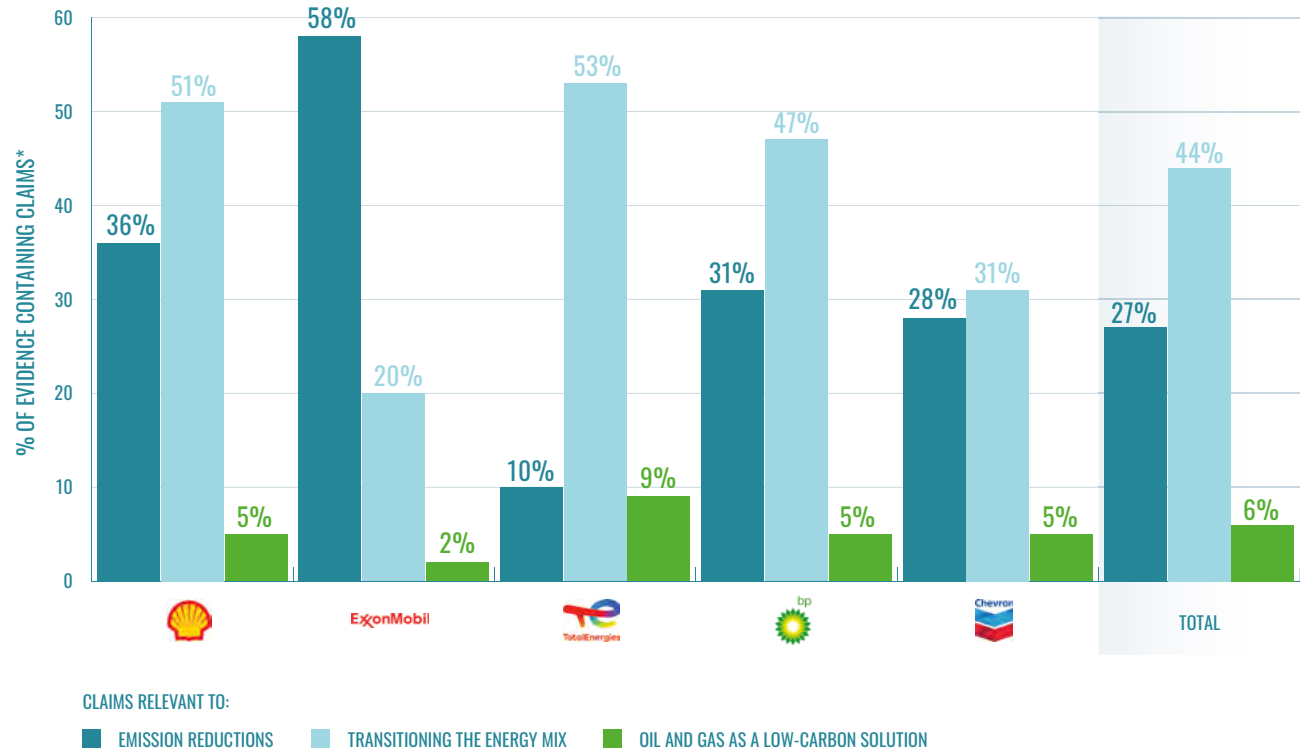
- Shell PLC had the highest percentage of green claims at 70%, with 51% of its communications containing claims about transitioning the energy mix.
- TotalEnergies had the highest proportion of evidence pieces (53%) that contained claims about transitioning the energy mix. This large number likely reflects TotalEnergies re-branding campaign in 2021 from Total S.A. to

TotalEnergies, in which the company claims to be a 'broad energy company'.

- BP has a similar percentage of claims about the transition of the energy mix at 47%. This indicates a clear trend among the European supermajors to focus a large proportion of their communications promoting claims regarding the transition of the energy mix.
- In contrast, the US supermajors devote significantly less time promoting the transition of the energy mix (ExxonMobil = 20% and Chevron = 31%). Despite this, ExxonMobil has the second highest percentage of green claims overall (65%). This stems from 58% of ExxonMobil's communications including claims about emissions reductions. The difference in communications strategies suggests the European companies are presenting themselves as broad energy companies (emphasizing their businesses in renewables for instance, rather than presenting themselves as oil and gas companies), while ExxonMobil appears to be focused on presenting itself as low emission oil and gas producer.
- 49% of Chevron's communications contained green claims, suggesting that the company is less concerned with promoting its climate

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Diagram 2: Percentage of Evidence Pieces Containing Different Types of 'Green Claims'



*Percentage here refers to the proportion of the total number of evidence items assessed which contained the claims in question. Each item of evidence assessed might contain more than one type of claim, while some items of evidence contained no relevant claims.

credentials than the other supermajors. On the contrary, it appears to dedicate a greater proportion of its public communication activities to promoting an ongoing role for oil and gas. Chevron's green claims were fairly even

split between claims about transitioning the energy mix (31%) and claims about emissions reductions (28%).

CEOs on Social Media

All the supermajors' CEO's had at least one social media account except for Dan Woods, CEO of ExxonMobil. These accounts, particularly LinkedIn accounts, had higher percentages of green claims than the overall average for each company. This indicates CEOs are leading their companies in making green claims about the business.

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Mike Wirth, Chevron

77% CEO LinkedIn

As the world demands ever-cleaner energy solutions, Chevron is focused on innovation that can help reach the global net zero emission ambitions of the Paris Agreement while ensuring energy remains affordable and reliable. *(CEO LinkedIn, July 2021)*



Bernard Looney, bp

75% CEO LinkedIn

72% CEO Instagram

The importance of greening companies: Companies that are carbon intensive today – but have an ambition to decarbonise and get to net zero like @bp_plc does – are needed by the world every bit as much as green companies. Because, if carbon intensive businesses are willing to commit to change – and be held accountable – we should back them. What's your view? *(CEO Instagram, April 2021)*



Patrick Pouyanné, TotalEnergies

72% CEO LinkedIn

48% CEO Twitter

We take the subject of the #transition head on by being offensive and positive. #TotalEnergies will be one of the big green “supermajors” and will be part of the top 5 in the world of #renewables. *(CEO LinkedIn, March 2021, Translated from French)*



Ben van Beurden, Shell PLC

77% CEO LinkedIn

Businesses and governments can bring the world closer to net-zero emissions by going faster and further. In this article, I set out how Shell is accelerating its efforts and why I hope governments will also step up their commitments to net zero in Glasgow. *(CEO LinkedIn, November 2021)*

Rebranding from Oil Majors to Energy Companies

Across the 3,421 evidence pieces, only 23% contained pro-oil and gas claims. Key oil and gas claims include communications emphasizing:

- The benefits of oil and gas (or the industry) for the community & economy
- The benefits of oil and gas (or the industry) for energy security, energy independence and national identity.
- The need for oil and gas (or the industry) in maintaining a high quality of life

Table 7 shows the number and percentage of evidence pieces containing oil and gas claims per company, with the US supermajors promoting oil and gas significantly more than the European supermajors.

“ This indicates a clear trend among the European supermajors to focus a large proportion of their communications promoting claims regarding the transition of the energy mix. ”

Table 7: Number and Percentage of Evidence Pieces Containing ‘Pro Oil & Gas Claims’

Company	No. of Evidence pieces containing ‘Oil & Gas Claims’	Evidence pieces containing ‘Pro-Oil & Gas Claims’ (%)*
Chevron	237 (of 640)	37
ExxonMobil	106 (of 329)	32
TotalEnergies	252 (of 1125)	22
BP	162 (of 957)	17
Shell	30 (of 370)	8

*Percentages should be read as percentage of evidence items which contained the claim in question rather than the percentage of overall claims.

This effort from the industry to distance itself from primarily oil, but also gas, can also be seen in the recent rebranding efforts of the oil and gas majors to describe themselves as ‘energy’ or ‘integrated energy’ companies. Using the term ‘energy’ allows the oil and gas companies to disassociate themselves from their primarily fossil fuel businesses and be thought of in the wider and more neutral category of ‘energy’, which includes renewable energy. The following extracts are taken from the ‘About Us’ section of the supermajors’ websites and are accurate as of 13th June 2022.

Company	“About Us”
	<p>On ExxonMobil's 'Who we are' page, “ExxonMobil, one of the world's largest publicly traded energy providers and chemical manufacturers, develops and applies next-generation technologies to help safely and responsibly meet the world's growing needs for energy and high-quality chemical products.” ExxonMobil mentions oil and gas once under the following paragraph entitled 'Fueling the world safely and responsibly' (excluding references to Motor Oil at the bottom of the page).</p>
	<p>Chevron's 'About' page leads with 'the human energy company; we define energy in human terms; Access to energy helps improve lives by driving human progress and enabling the benefits of modern society. That's why we're constantly working to provide reliable, affordable and ever-cleaner energy for the millions around the world that rely on us.' Chevron does not mention oil or gas once on the page, although alludes to it in images below with the captions (linked to further pages) 'explore the largest single resource development in Australia' (under an image of two employees at a facility) and 'see how we operate' (also under an image of two people in uniform at a facility of some description).</p>
	<p>BP's 'Who we are' page begins with 'Our purpose is reimagining energy for people and our planet. We want to help the world reach net zero and improve people's lives.' BP mentions the word oil twice and gas once at the bottom of the page under a section called 'Our History'. This section reads, 'Our story has always been about transitions: from coal to oil, from oil to gas, from onshore to deep water, and now onwards towards a new mix of energy sources as the world moves to a lower carbon future.'</p>
	<p>Shell's 'About us' page also does not mention oil or gas. It reads 'We are a global group of energy and petrochemical companies with more than 80,000 employees in more than 70 countries. We use advanced technologies and take an innovative approach to help build a sustainable energy future. Only when you click through to the 'Who We Are' page, does Shell mention oil and gas. On this page, Shell describes itself as an 'international energy company with expertise in the exploration, production, refining and marketing of oil and natural gas, and the manufacturing and marketing of chemicals', and that it also invests in 'power, including from low-carbon sources such as wind and solar [...].</p>
	<p>On its 'Our Identity' page, TotalEnergies describes itself as a broad energy company that produces and markets energies on a global scale: oil and biofuels, natural gas and green gases, renewables and electricity. [...]: When one searches TotalEnergies in Google, the order is reversed so that it reads 'TotalEnergies Global Homepage – Renewables and Electricity...'. This matches the order of the rest of TotalEnergies 'Who we are' page, starting with 'Electricity' and renewables, followed by 'Gas: Leveraging Natural Gas to Drive the Energy Transition', and finally 'Liquids: Satisfying Global Demand and Decarbonizing Petroleum Products.</p>

Similar trends have been noted in the naming and descriptions of the supermajors' key industry associations. The American Petroleum Institute switched the order of 'Oil and Natural Gas', so it now leads with its representation of the *'natural gas and oil industries'*. Oil and Gas UK has rebranded itself *'Offshore Energies UK'*.

3. Business Operations

This chapter compares the supermajors' pro-climate public communications strategies to several mainstream industry metrics, highlighting the roles that oil, gas and low-carbon technologies play in their business operations.

“Low carbon” and/or “renewable” capital expenditure (CAPEX) figures have been taken from, or estimated based on, information in the companies' most recent disclosures (as of May 2022). The oil, gas, and owned renewable power forecast production numbers used are generated by third-party data provider, *Asset Resolution*. This analysis utilizes industry standard databases to map physical assets to companies and subsequently assess company climate alignment.⁹

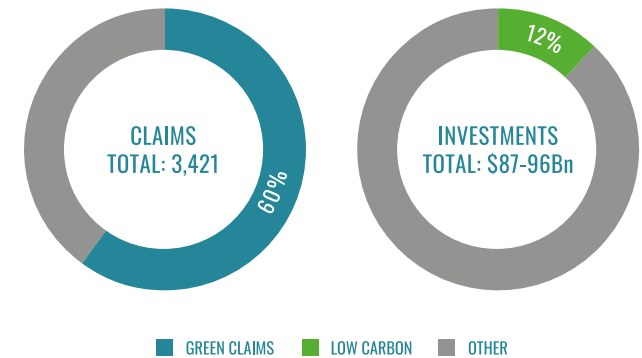
⁹ The use of asset-based forecast data by a third-party provider (*Asset Resolution*) rather than stated production plans allows for fair comparison of consistent data between the companies. This data is based on the equity-owned assets of the companies as of Q4 2021. This is the most recent full dataset available from the data provider and correlates best to InfluenceMap's analysis of the companies' public communications in this report. It does not consider any company announcements or decisions related to oil, gas, and renewables investments/divestments after Q4 2021.

The research shows that

- Only 12% of the supermajors' 2022 CAPEX is dedicated to 'low carbon' activities according to company disclosures, compared to 60% of the companies' public communication that contained green claims.
- Only 23% of the companies' public communications contain oil and gas claims. However, all the oil and gas companies are forecast to increase their oil and gas production, with the exception of BP, which maintains similar levels of oil and gas production in 2026 as compared to 2021.¹⁰

¹⁰ According to a report published by Global Climate Insights in March 2022, while BP has committed to reducing oil and gas production, it has also committed to *increasing* oil and gas sales from third-party producers (page 10). In an *investor presentation* in Q2 2020 BP CEO Bernard Looney stated that “the products we sell will likely rise for several years, before starting to fall.”

Diagram 4: Percentage of Green Claims in 2021 Public Communications vs Percentage of 'Low Carbon' Investments in 2022 CAPEX



In defining CAPEX in their financial disclosures, the companies use varying categorizations and names for 'low carbon' activities. Both TotalEnergies and Shell appear to have included fossil gas-related investments in their 'low carbon' CAPEX outlook. ExxonMobil's, Chevron's, Shell's, and BP's 'low carbon' investments all include hydrogen but don't distinguish whether this is blue (fossil gas derived) or green (renewable derived) in origin.

As such, naming conventions between the companies range from 'Lower Carbon' to 'Renewables & Electricity' and appear to extend to renewables, biofuels, hydrogen, CCS, offsets, and, in some instances, fossil gas-related activities. The companies generally do not provide details on how their investments in 'low carbon' activities are split across these different technologies. It is therefore likely that the disparity in spending on fossil fuel-related investments as compared to zero-emission technologies is even greater still.

Shell discloses CAPEX estimates for its Renewables & Energy Solutions division, coming to approximately 10% of total estimated 2022 CAPEX¹¹. This division is active in hydrogen and renewables, but also in the marketing, sale, and trading of gas and gas-generated power. Additionally, Shell publishes broader CAPEX expectations for "low- and zero-carbon products and services", coming to around one third of total estimated 2022 CAPEX. These products and services include EV charging, but also chemicals and lubricants. As a result, Shell's reporting makes it difficult to ascertain the company's actual investments in IPCC- recognized green technologies contributing to the energy transition.






¹¹ A breakdown of how InfluenceMap arrived at this figure for Shell can be found in Shell's Integrated Climate Profile, downloadable [here](#).

3.1 'Low carbon' Investments and Renewable Capacity

As detailed in the Public Communications chapter above, InfluenceMap's analysis of the companies' public communications found that the most prevalent type of green claim in 2021 were those promoting company, industry, and economy-wide measures to transition the energy mix (44%). Despite this, only 12% of total 2022 CAPEX forecasts are dedicated towards 'low carbon' investments according to company disclosures.

Table 16 compares the percentage of public communications containing green claims specific to 'Transitioning the Energy Mix' with the percentage of CAPEX forecast dedicated to 'low carbon' activities. A full breakdown of the steps taken to arrive at the company low carbon CAPEX figures can be found in the individual company profiles, available [here](#).

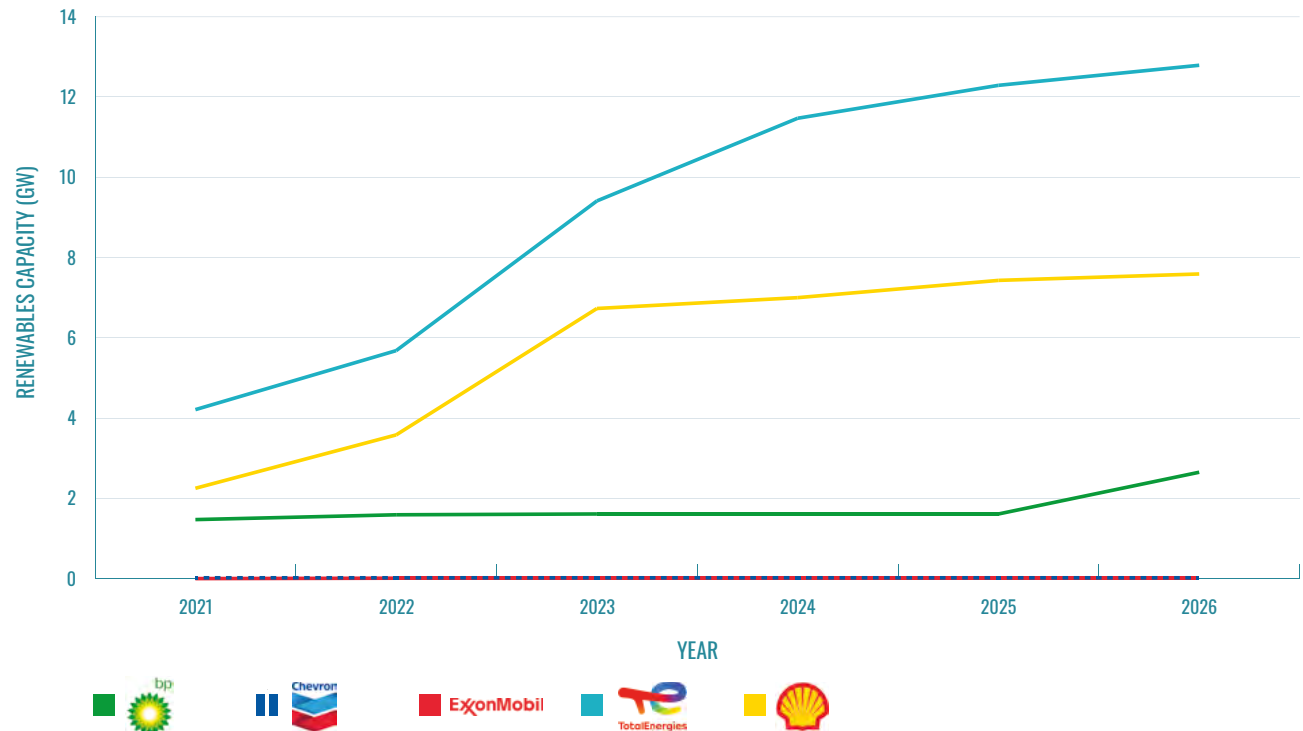
Table 16: Percentage of Public Communications Evidence Pieces Containing ‘Transitioning the Energy Mix’ Claims and Estimated Percentage of 2022 CAPEX Forecast Dedicated to ‘Low Carbon’ Investments

Company	Public Communications Containing ‘Transitioning the Energy Mix’ claims (%)	Estimated % of 2022 CAPEX forecast dedicated to ‘low carbon’ investments (and what’s included)
	51%	<p>10% in ‘Renewables & Energy Solutions’ (including hydrogen; renewables; and marketing, sale, and trading of gas and gas power) *</p> <p><i>*Shell’s ‘Renewables and Energy Solutions’ future CAPEX was stated to be \$2-3 billion. Shell’s total 2022 CAPEX is estimated by the company to be \$23-27 billion. Using \$2.5 billion and \$25 billion as estimates respectively, it appears that approximately 10% of Shell’s CAPEX will be dedicated to ‘Renewable and Energy Solutions’ in 2022. Shell also states that around one third of its total CAPEX in 2022 will be dedicated to “low- and zero-carbon products and services”. However, these include products which do not appear directly related to the energy transition, such as chemicals and lubricants, and, to ensure comparability with the other companies, are not considered in this research.</i></p>
	20%	<p>8% in ‘Lower Emissions’ (including emissions intensity reductions, CCS, hydrogen, and biofuels) *</p> <p><i>*ExxonMobil’s ‘Low Carbon Solutions’ 2023 CAPEX was disclosed to be around \$1.7 billion. ExxonMobil’s total 2022 CAPEX is estimated by the company to be \$20-25 billion. Using \$1.7 billion and \$22.5 billion as estimates respectively, it appears that around 8% of ExxonMobil’s CAPEX will be dedicated to ‘Low Carbon Solution’ in 2022</i></p>
	53%	25% in ‘Renewables & Electricity’ (including renewables and CCGT gas-fired power)
	47%	<p>17% in ‘Low Carbon’ (including renewables, biofuels, EV, hydrogen, and CCS) *</p> <p><i>*BP’s 2022 low carbon CAPEX estimate is disclosed as \$2.5 billion. Its total expected 2022 CAPEX is stated to be \$14-15 billion.</i></p>
	31%	5% in ‘Lower Carbon’ (including renewable fossil gas production, renewable fuels, hydrogen, CCS, and offsets)

- Energy transition technologies are represented in a significantly larger share of the companies' public communications than the equivalent share of 'low carbon' technology investments in their forecasted capital expenditure. As such, the analysis suggests that the supermajors are misrepresenting their primary business operations in their public communications by overemphasizing energy transition technologies.
- Diagram 5 shows forecasts for the companies' equity-owned renewables capacity over the coming years. This data is based on equity-owned physical assets as of Q4 2021. These figures may differ from companies' own reporting based on the allocation method used and the exact date of disclosure.
- European headquartered companies Shell, BP, and TotalEnergies have the highest proportion of public communications promoting transitioning the energy mix. There appears to be a divide between the European and US supermajors regarding their investments into renewable energy sources. Shell, BP, and TotalEnergies have existing installed capacity in 2021 and growth plans for the coming years, while the US companies are limited to zero or almost zero renewable energy capacity.

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Diagram 5: Supermajors' Renewables Capacity Forecast (based on data from Asset Resolution)



TotalEnergies has the largest equity-owned capacity, with 4.2 GW confirmed as of Q4 2021. As a point of comparison, large European energy companies Iberdrola, Enel, and Ørsted respectively have 18.7 GW, 16.1 GW, and 9.6 GW of equity-owned renewables capacity at the same point in time.

- ExxonMobil appears to have closer alignment between its public communications on transitioning the energy mix (20%) and CAPEX. ExxonMobil's lower percentage of public communications concentrating on transitioning the energy mix appear to reflect its low percentage of CAPEX due to be invested in 'Lower Emissions'.

3.2 Oil and Gas Production

Only 23% of the companies' public communications contain oil and gas claims. However, many of the supermajors are forecasted to increase their oil production up to 2026 from a 2021 baseline. Diagrams 6 and 7 used Q4 2021 data from Asset Resolution to project the oil and gas production of the supermajors out to 2026 based on equity-owned physical assets, as compared to the International Energy Agency's Net Zero by 2050 scenario.

Diagram 6: Supermajors' Oil Production Forecast
(based on data from Asset Resolution)

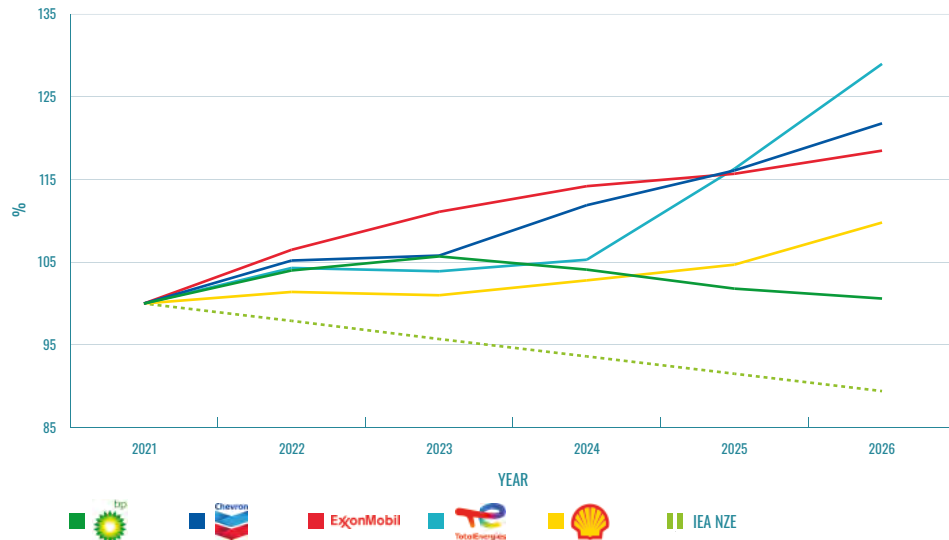
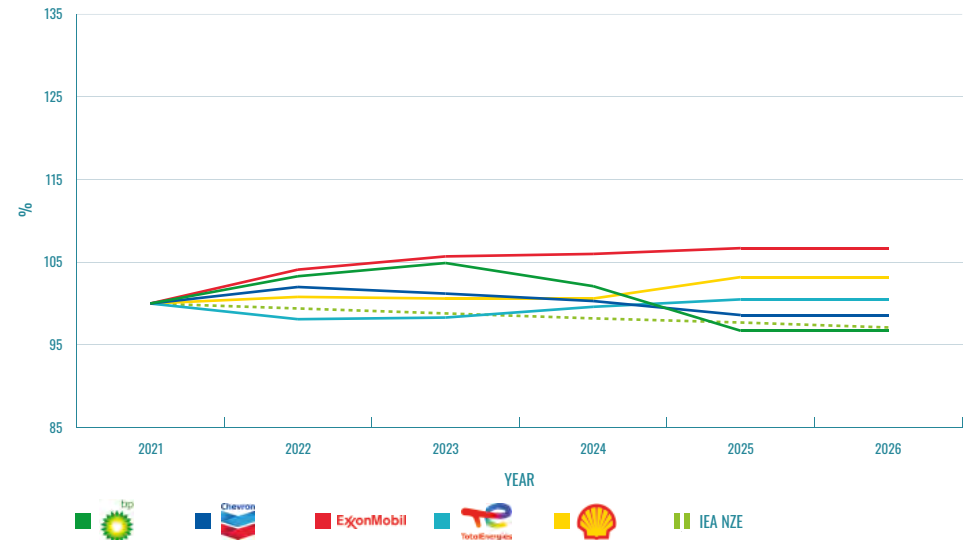


Diagram 7: Supermajors' Gas Production Forecast
(based on data from Asset Resolution)



- The *IEA's Net Zero by 2050* roadmap lays out the urgent need for a rapid drop in global oil and gas demand if the world is to retain hope of meeting a 1.5 °C pathway. The Net Zero Emissions by 2050 Scenario (NZE) states that this decline in demand means that no fossil fuel exploration and no new oil and fossil gas fields are permissible beyond those that have already been approved for development in mid-2021. Additionally, global oil production must drop by 10% by 2025 and 20% by 2030 compared to 2020 levels. Fossil gas production must also decline, though at a slower rate.
- The graphs above show that none of the five supermajors' forecasted oil production plans align with the NZE pathway, with the companies' forecasted 2026 oil production ranging from 96% to 119% of 2021 production¹². This is despite all companies having public commitments and communications on supporting net zero by 2050.
- The analysis suggests that TotalEnergies is the most misaligned producer, forecasted to considerably ramp up oil production from 2023 onwards. These forecasts are based on the physical assets (i.e., oil and gas fields) owned at Q4 2021 by the companies and may differ from stated production plans of the supermajors (e.g., if these include non-publicly disclosed reduction or divestment plans).

¹² *Asset Resolution. (2021).*



Only 12% of the supermajors' 2022 CAPEX is dedicated to 'low carbon' activities according to company disclosures, compared to 60% of the companies' public communication that contained green claims.



4. Direct Policy Engagement

4.1 Introduction

The first part of the analysis covering the companies' Public Communications detailed how the supermajors' public communications present the companies as acting overwhelmingly in favor of climate action and supporting efforts to achieve the goals of the Paris Agreement.

This final chapter covers InfluenceMap's analysis of the companies' detailed engagement with climate policy and regulation finding that, despite some improvements from several companies over last five years, none of them are supporting the climate policy pathways needed to deliver the goals of the Paris Agreement. Furthermore, each company retains dense and global networks of industry associations actively opposing ambitious climate policy.

Following an overview of these findings, this chapter highlights three key areas where the supermajors' direct lobbying of policymakers on climate since 2021 appears misaligned with IPCC-aligned policy pathways, as well as the positive public image on climate action the companies have sought to create via their public communications.

- Advocating for increased oil and gas production
- Promoting long term energy pathways that encourage the use of fossil gas, instead of focusing on renewables and electrification
- Conservative positioning on the stringency and ambition of methane emissions reduction regulations, despite high-level support for adoption of policies

4.2 Overview

InfluenceMap's *LobbyMap platform* assess corporate climate policy engagement against Paris-aligned policy and science-based benchmarks to show the extent to which the companies are supporting or opposing legislation and regulations aimed at delivering the Paris Agreement's goals. None of the companies covered in this report have LobbyMap Performance Bands indicating support for climate policies in line with the goals of the Paris Agreement. An overview of the LobbyMap methodology can be found in Appendix A, and in greater detail [online](#).

Table 8 contains a breakdown of the companies' LobbyMap Performance Bands, Organization Score, Relationship Score, and Engagement Intensity, with explanations of the scores below.

Table 8: Company Policy Engagement Scores

Company	Organization Score (0-100)	Relationship Score (0-100)	Engagement Intensity (0-100)	Performance Band (alignment to the goals of the Paris Agreement)
BP	69	49	59	C- (Mixed alignment)
Shell PLC	68	50	62	C- (Mixed alignment)
TotalEnergies	60	58	52	C- (Mixed alignment)
ExxonMobil	47	43	49	D (Misaligned)
Chevron	40	40	45	D- (Misaligned)

- Organization Score** (expressed as a percentage from 0 to 100) is a measure of how supportive or obstructive the company's own policy positions and engagement are in relation to climate policy aligned with the Paris Agreement, with 0 being fully opposed and 100 being fully supportive. Scores below 50 indicate increasingly significant misalignment between the Paris Agreement and the company's detailed climate policy engagement, with scores below 25 indicating material and significant opposition. Scores between 50

and 75 indicate mixed engagement with Paris-aligned policy. Scores above 75 indicate broad alignment with, and support for, Paris-aligned policy.

- Relationship Score** (expressed as a percentage from 0 to 100) is a measure of how supportive or obstructive the company's industry associations are towards climate policy aligned with the Paris Agreement, with 0 being fully opposed and 100 being fully supportive. The Relationship Score is an aggregate assessment of the climate policy engagement of a company's industry associations and measures the extent to which this is in line with the goals of the Paris Agreement. This calculation accommodates an assessment of the strength of the relationship between a company and an industry association, for example a stronger weighting will be attributed where a company has a representative on the board of an industry association.
- Engagement Intensity** (expressed as a percentage score from 0 to 100) is a measure of the level of policy engagement by the company, whether positive or negative. Scores above 12 indicate active engagement with climate policy, and scores above 25 indicate highly active or strategic engagement with climate policy. Scores below 5 indicate low-level engagement with climate policy.
- Performance Band** (A+ to F) is a full measure of a company's climate policy engagement, accounting for both its own engagement and that of its industry associations. For companies, the 'Organization Score' and 'Relationship Score' are combined to result in a total score that places the company in a Performance Band. There are 16 Performance Bands from A+ (representing a total score from 95-100%) through to E- (a score of 25-30%), with scores below 25% falling in the red "F" band. Grades from A+ to B (i.e. above 75%) indicate broad support for Paris-aligned climate policy, with grades from D to F (i.e. below 50%) indicating increasingly obstructive climate policy engagement

Change Over Time

Table 9 highlights changes in the companies' Organization Scores (assessing the companies' own climate policy positions and lobbying activities) since 2017, noting a largely positive trend despite none of the companies yet aligning their policy positions with science-based pathways to achieve 1.5C warming. This finding contrasts sharply with InfluenceMap's assessment of the supermajors' industry associations (represented by the Relationships Score), which largely remain highly oppositional to meaningful climate policy, discussed at the end of this chapter.

Table 9: Organization Scores Over Time

Company	Organization Score	
	2017	2022
<i>BP</i>	45	69
<i>Chevron</i>	27	40
<i>ExxonMobil</i>	31	47
<i>Shell PLC</i>	53	68
<i>TotalEnergies</i>	50	60

- Chevron and ExxonMobil have lower Organization Scores than their

European counterparts. The limited improvement from these two companies has largely come from the increasing use of high-level supportive communications around the science of climate change, the need to reduce emissions, and the Paris Agreement.

- For the European companies with mixed Organization Scores (BP, Shell, TotalEnergies), InfluenceMap has tracked more positive positions on several types of policy, particularly those related to the decarbonization of transport. For example, *BP*, *Shell* and *TotalEnergies* have communicated their support for blending mandates of sustainable aviation fuels (SAFs) between 2020-2022. BP and Shell have both communicated its support for the UK's internal combustion engine (ICE) 2030 phase out targets in *July 2020* and *March 2021* respectively, while TotalEnergies advocated for policymakers to support transportation electrification policies in the Biden administration Infrastructure Bill in *July 2021*.
- InfluenceMap has also recorded positive positions from the European companies on the development of renewable energy. For example, *BP Shell* and *TotalEnergies* all directly advocated to US Congressional leadership to pass the clean energy tax credits in the Build Back Better Act between January 2022 and July 2022.

For the purposes of the analysis, in the remainder of this chapter, a contrast is made between the public messaging for companies (overviewed in the Public Communications chapter), covering marketing, PR and public policy engagement activities) and messaging targeted more directly at policymakers (e.g. in direct policy engagements via meetings, consultation responses and expert input) from 2021 onwards. This enables comparative analysis, highlighting the differences between how the oil companies present themselves to the public to how they present themselves to policymakers.

4.3 Direct Policy Engagement vs Public Communications on Climate

Despite the positive trends highlighted above, this research also identifies three broad issues that have been a focus of the oil companies' direct climate policy engagement since 2021 that contrast with the positive public image evoked via the companies' public communication channels.

- Advocating for increased oil and gas production
- Promoting long term energy pathways that encourage the use of fossil gas, instead of focusing on renewables and electrification
- Conservative positioning on the stringency and ambition of methane emissions reduction regulations, despite high-level support for adoption of policies

Table 10 overviews how each company has engaged with policymakers on each of these policy areas. The traffic light indicators show the extent to which this engagement is aligned with InfluenceMap's Paris-aligned policy and science-based benchmarks. The rest of this section overviews the companies' engagement with these policy streams, focusing on key examples of misalignment. For further details on the companies' overall policy engagement, please use the links provided in Table 10 to read their full InfluenceMap profiles.

Table 10: Engagement with Policymakers on Key Policy Areas According to Paris-aligned Policy and Science-based Benchmarks Since 2021 (as of Aug 2022)

Company	Oil and Gas Production	Fossil Gas vs Electrification and Renewables	Methane Emissions Regulations
<i>Shell</i>	Negative	Mixed	Mixed*
<i>BP</i>	Negative	Mixed	Mixed
<i>TotalEnergies</i>	N/A	Mixed	N/A*
<i>Chevron</i>	Negative	N/A	Negative
<i>ExxonMobil</i>	Negative	Mixed	Mixed

*TotalEnergies and Shell have not commented on the EU's most recent round of consultation on the EU Methane Policy despite having supported a stronger regulation in 2020.

KEY

Negative	The company has directly engaged policymakers on the policy area with negative position/s (misaligned from Paris-aligned climate policy or the science of the Intergovernmental Panel on Climate Change (IPCC))
Mixed	The company has directly engaged policymakers on the policy area with mixed positions (a combination of positive and negative positions) or has not communicated a clear position overall when compared to Paris-aligned policy or the science of the IPCC.
Positive	Company has directly engaged policymakers on the policy area with positive position/s (in alignment with Paris-aligned policy or the science of the IPCC)
N/A	InfluenceMap has not found evidence of direct engagement with policymakers on the policy area since 2021

Oil and Gas Production

As detailed in the chapter analyzing the companies' public communications, 44% of all public communications from the five companies contained positive 'green claims' concerning the transition of the energy mix, while only 23% of public communications promoted oil and gas or the oil and gas industry. This split would suggest that the companies are positioning themselves to transition away from fossil fuels.

However, the research found evidence on all the supermajors bar TotalEnergies advocating directly to policymakers for continued investment into oil and gas production and infrastructure in 2021-2022. Additionally, Chevron, ExxonMobil, and BP have opposed policies to reduce the use of oil and gas. This appears to contradict the findings of the IPCC's *'Mitigation of Climate Change'* report, which state net-zero CO2 energy systems require a "substantial reduction in overall fossil fuel use."

Table 11: Examples of Direct Policy Engagement Advocating for Increased Oil and Gas Production

Company	Direct Lobbying Advocating for Increased Oil and Gas Production
Shell	<p>In April 2022, in <i>testimony</i> to the Subcommittee on Oversight and Investigations, Shell USA CEO Gretchen Watkins advocated for advancing the approval of LNG export permits as well as accelerating the permitting of new oil and gas projects and restart federal lease sales in the Gulf of Mexico.</p> <p>In April 2021, <i>Shell</i> directly advocated for measures to promote new oil and gas development in the Gulf of Mexico.</p>
ExxonMobil	<p>In April 2022, Darren Woods, CEO of ExxonMobil <i>advocated</i> for policies that encourage investment into oil and gas in the Subcommittee on Oversight and Investigations' hearing in the US.</p> <p>In March 2022, ExxonMobil <i>reportedly</i> warned authorities in Victoria, Australia against introducing targets to reduce fossil gas consumption in a public speech delivered at the Australian Domestic Gas Outlook conference.</p> <p>In December 2021, ExxonMobil <i>reportedly</i> ran an 'ad blitz' opposing the New York City ban on new gas connections in new buildings.</p>
BP	<p>In April 2022, BP America <i>told</i> the US Subcommittee on Oversight and Investigations there was a need to continue investing in hydrocarbons, alongside zero-carbon energy sources.</p> <p>In April 2021, BP America directly <i>advocated</i> for measures to promote new oil and gas development in the Gulf of Mexico.</p> <p>In January 2022, BP America <i>advocated directly</i> to policymakers against limiting and phasing-out credit generation for petroleum projects under California's Low Carbon Fuel Standard.</p>
Chevron	<p>In April 2022, CEO Mike Wirth <i>advocated</i> for policies to boost US oil and gas production to the US Subcommittee on Oversight and Investigations.</p> <p>In March 2022, Chevron <i>reportedly</i> filed a lawsuit against Governor Newsom of California for a 'de-facto' ban on new fracking</p> <p>In August 2021, Mike Wirth <i>suggested</i> in an interview with the Washington Post that California's target to phase out gasoline-powered vehicles by 2035 was unrealistic.</p>
TotalEnergies	<p>InfluenceMap has not found publicly available evidence of TotalEnergies directly engaging with policymakers to support increased oil and gas production in 2021 - 2022.</p>

Fossil Gas vs Electrification and Renewables

InfluenceMap's analysis shows that the supermajors have promoted fossil-gas focused energy pathways as alternatives to those more focused on electrification and renewable energy. The section above detailed evidence of ExxonMobil, Chevron, and BP's US subsidiary BP America directly engaging in opposition to policies to phase out the use of fossil fuels in the transport and building sectors. While the European-headquartered supermajors appear to have been more supportive of certain aspects of electrification policy, for example the *promotion* of electric passenger vehicles, they also appear to have focused considerable lobbying effort into diluting policies designed to ramp up renewable energy production by advocating for the inclusion of fossil gas in government support packages.

As part of InfluenceMap's assessment of the company's climate policy engagement activities, 41 separate items of evidence were collected pertaining to the supermajor's direct engagement with policymakers (e.g. regulator consultation responses or company-policymaker meeting minutes and material, accessed via freedom of information requests) dated between January 2021 and August 2022 that specifically addressed topics concerning the energy transition¹³.

Of these 41 evidence items,

- 22 pieces (54%) explicitly promoted a role for fossil gas (not including support for fossil-gas based hydrogen).
- 27 (66%) referred to the potential of new technologies to enable transition away from fossil gas (including hydrogen, biomethane, etc.)

¹³ Evidence regarding the Energy Transition & Zero Carbon Technologies is one of 13 categories (or "queries") used by InfluenceMap to search for and categorize evidence of corporate climate policy engagement. Other categories include emissions trading policy, carbon taxes, energy and resource efficiency, renewable energy policy, and GHG emissions standards and targets. A full explanation can be found in InfluenceMap's LobbyMap methodology and viewed on the company profiles.

Fossil Gas as a Low Carbon Solution

A key tactic for the oil and gas companies has been to place emphasis on the 'green credentials' of fossil gas, for example through advocating for coal-to-gas switching and asserting that fossil gas is 'low carbon'. For example, in a *video* posted on Facebook, TotalEnergies claimed: "Abundant, inexpensive, and flexible, gas is the fossil fuel that emits the least greenhouse gas. An essential partner to renewable energies, it can also replace coal & oil to supply energy to millions of homes." This narrative contrasts the scientific findings of the *Intergovernmental Panel on Climate Change* in its August 2022 report, which has called fossil to fossil fuel switching a 'potentially dangerous' strategy given its potential for energy supply infrastructure lock-in.

This tactic is deployed in both companies' public-facing communications and more direct engagement with policymakers, but to different extents. InfluenceMap's analysis of the companies' public communications noted that claims about the role of fossil gas as a 'low-carbon' solution in the companies' public communications were limited (only 6% overall).

In contrast, promoting fossil gas as a climate solution appears to be a key strategy used by the supermajors when engaging directly with policymakers. Of the 22 evidence pieces that explicitly promoted a role for fossil gas, 16 were found to have utilized narratives promoting the role for fossil gas as a climate solution; including as a transitional fuel, as a replacement for coal, or as a partner to renewables.

It is unclear what is driving this disparity between the use of these narratives in public communications versus direct policy engagements.¹⁴ One explanation could be the increasing regulatory and legal attention to oil companies' public communications and advertising while there is currently no body regulating the use of misleading claims or disinformation in direct policy engagements with policymakers.

¹⁴ Promoting the 'green' credentials of fossil gas appears to be a tactic used by the wider industry. In InfluenceMap's [February 2022 report](#) on the EU gas industry's lobbying found that around two thirds of pro-gas policy engagements in Europe between 2020-2021 from the gas industry used narratives promoting fossil gas as either a low-carbon solution or a transition fuel to low-carbon solutions.

Future Technologies as a Route to Extended Fossil Gas Use

In addition, of the 41 evidence pieces from regulatory consultations and company meetings with policymakers promoting a role for fossil gas, 27 referred to the potential of new technologies to decarbonize fossil gas. This included:

- 13 pieces referenced blue hydrogen (32%) (fossil gas-based hydrogen), while another 3 supported 'low carbon' or 'low carbon intensity hydrogen' without specifying what type of hydrogen this referred to. A further 11 evidence pieces referenced 'hydrogen' without specifying the type of hydrogen being supported, including one reference to 'clean hydrogen'. In total, 27 (67%) evidence pieces promoted hydrogen.
- In addition, 6 pieces (17%) also promoted biomethane. (Note all evidence pieces which promoted biomethane also promoted hydrogen.)

The IPCC's August 2022 *'Climate Change 2022: Mitigation of Climate Change'* discusses the potential for such technologies (dependent on the technology type and scenario in question), for example, one of the common characteristics of net zero energy systems is the "use of alternative energy carriers such as hydrogen and bioenergy as substitute for fossil fuels in sectors less amenable to electrification". However, it also sets out the risks to delivering net-zero emissions associated with pathways that rely heavily on such technologies, drawing attention to issues pertaining to cost reduction and the feasibility of large-scale adoption. The IPCC's analysis also finds that other common characteristics of net zero energy systems include the "widespread electrification of end uses", including light duty transport, heating, and cooking and "substantially lower use of fossil fuels."

InfluenceMap's analysis found that much of the lobbying efforts supporting the decarbonization of fossil gas or transitioning to lower-carbon alternatives tended

not to provide details on the scale, feasibility, or timelines of such transitions. In general, such arguments largely only refer to the companies' support for "low-carbon" gases or fuels, which often appears to cover a range of technologies (including renewable gases and biomethane, blue hydrogen and CCS, and fossil gas). This position is used in lobbying efforts across several sectors, including transport, power, and energy for use in residential buildings. As such, arguments deployed for this purpose appear to form a set of narratives promoting technical solutions to fossil gas emissions that consequently justify a prominent role for fossil gas in future policy pathways, but without attaching clear timelines for achieving the necessary decarbonization. As such, much of the engagement from the supermajors on this topic appears misaligned from the latest IPCC guidance.

InfluenceMap analysis shows that the supermajors' advocacy for these technologies appear to support policy and regulation that enables and encourages continued investments into fossil gas and fossil gas infrastructure. Examples of recent engagement on this policy area can be found in Table 12.

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Table 12: Examples of Direct Policy Engagement Promoting Long Term Energy Pathways that Encourage the Use of Fossil Gas, Instead of Focusing on Renewables and Electrification*

Company	Direct Lobbying Promoting Fossil Gas-Based Pathways
Shell	In February 2021, having supported an increase in ambition for the EU's renewable energy targets, Shell also <i>advocated</i> for broadening the EU's Renewable Energy Directive to include 'low-carbon fuels', including 'low-carbon hydrogen' (unspecified by company but potentially includes fossil gas-based hydrogen) and fuels made with 'waste CO2'.
ExxonMobil	In a meeting with the EU Commission's Department of Mobility and Transport in April 2021, ExxonMobil <i>advocated</i> for the promotion of 'low carbon combustion fuels' alongside electrification in the decarbonization of vehicles. ExxonMobil does not specify what is considers a 'low carbon combustion fuels' (unspecified by company but potentially includes fossil gas-based fuels).
BP	In February 2021, BP lobbied for a ' <i>technology neutral</i> ' approach in the Renewable Energy Directive (RED), advocating for the inclusion of non-renewable and low carbon fuels under the renewable energy policy. BP does not define 'low carbon fuels' but this potentially includes fossil gas-based hydrogen or fuels. In April 2022, BP has <i>advocated</i> for a 'technology neutral' approach to hydrogen production under the EU's Hydrogen and Gas Decarbonization Package in order to support the inclusion of fossil gas-based hydrogen.
TotalEnergies	In February 2021, in response to the EU's Renewable Energy Directive, TotalEnergies <i>advocated</i> that "all technologies" should be considered, including blue hydrogen (fossil gas-based) with CCS.
Chevron	InfluenceMap has not found publicly available evidence of Chevron directly engaging with policymakers on this topic.

*Some of the evidence refers to 'low carbon fuels'. The term 'fuels' appears to be used in the sense of materials which produce heat or power when burned, and/or to refer to transportation fuels when advocating specifically around transportation.

Methane Emissions Reductions Regulation

As detailed in the chapter assessing the companies' public communications, over a quarter (26%) of all public communications from the oil companies included claims about support for emissions reductions, either with reference to the companies' own efforts or targets, or for a wider societal need to reduce emissions. This included statements of support for methane emissions reductions. In lobbying efforts since 2021, several of the supermajors have offered high level support for methane emissions reductions, however, several companies have lobbied against increased regulatory stringency, either in part or in full.

The extent to which each oil company has engaged in this type of policy engagement differs, with Chevron appearing the most oppositional on methane regulations. Table 13 highlights some examples of the supermajors' direct engagement with methane regulations in 2021-2022.

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Table 13: Examples of Supermajor Positioning on Regulatory Stringency and Ambition of Methane Emissions Reduction Policy in Direct Policy Engagement, Despite High-level Support for Adoption of Such Policies

Company	Recent Direct Policy Engagement on Methane Policy
Shell	In November 2021, Shell offered <i>broad support</i> to the US EPA's proposed methane standards without commenting on the technical details, and instead proposed a methane intensity standard and 'flexible framework'. It is unclear how a flexible framework and methane intensity standard would impact the ability of the regulation to achieve significant methane emissions reductions. Shell has not commented on the EU's most recent round of methane regulation for the oil and gas sector, but did communicate <i>support for</i> more ambitious standards in January 2021.
ExxonMobil	ExxonMobil submitted a <i>mixed</i> position on the US EPA's proposed methane standards in January 2022, supporting some aspects of the proposal and calls to addressing flaring under the regulation. However, ExxonMobil appears to not support the measures extending monitoring ability to local communities or extending the regulation to smaller emitting wells.
BP	BP communicated support of the EU's proposed methane regulation for the energy sector with <i>major exceptions</i> in April 2022, including not supporting a prescribed monitoring frequency and also appearing to advocate for weakened flaring standards. BP America submitted a <i>mixed</i> position to the US regarding the EPA's proposed methane standards, calling for a rule that provides 'flexibility in compliance'.
TotalEnergies	TotalEnergies has not publicly commented on either the EU or US methane regulations in 2021-2022 directly with policymakers. TotalEnergies supported the EU Methane Strategy in May 2020 <i>with major exceptions</i> , advocating for policies to offer flexibilities and stressing the cost of reducing emissions.
Chevron	Chevron <i>supported</i> the oppositional comment of the American Petroleum Institute to the US Methane regulations in January 2022. The American Petroleum Institute's response appeared to <i>contest</i> the EPA's legal ability to implement the proposed methane standards to existing wells.

4.4 Industry Associations

InfluenceMap's LobbyMap databased includes over 175 industry associations globally, including 53 industry associations representing the energy sector. Industry associations are assessed on their direct policy engagement in the same manner as companies, allowing comparisons with companies on their Performance Band (alignment with the goals of the Paris Agreement) and Engagement Intensity (the frequency and scope of their policy engagement activities). In general, industry associations tend to be highly engaged on climate policy and are particularly influential, as they claim to represent business interests from important sectors or economies.

While the LobbyMap database currently does not cover all the supermajors' industry associations, it has recorded between 20-40 memberships for each company. Diagram 3 shows the companies retain a significant number of memberships to industry associations that are actively engaged in opposing Paris-aligned climate policy, with an Performance Band below D. (Please see Appendix A for further details on InfluenceMap's methodology).

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Diagram 3: Supermajors' Industry Associations

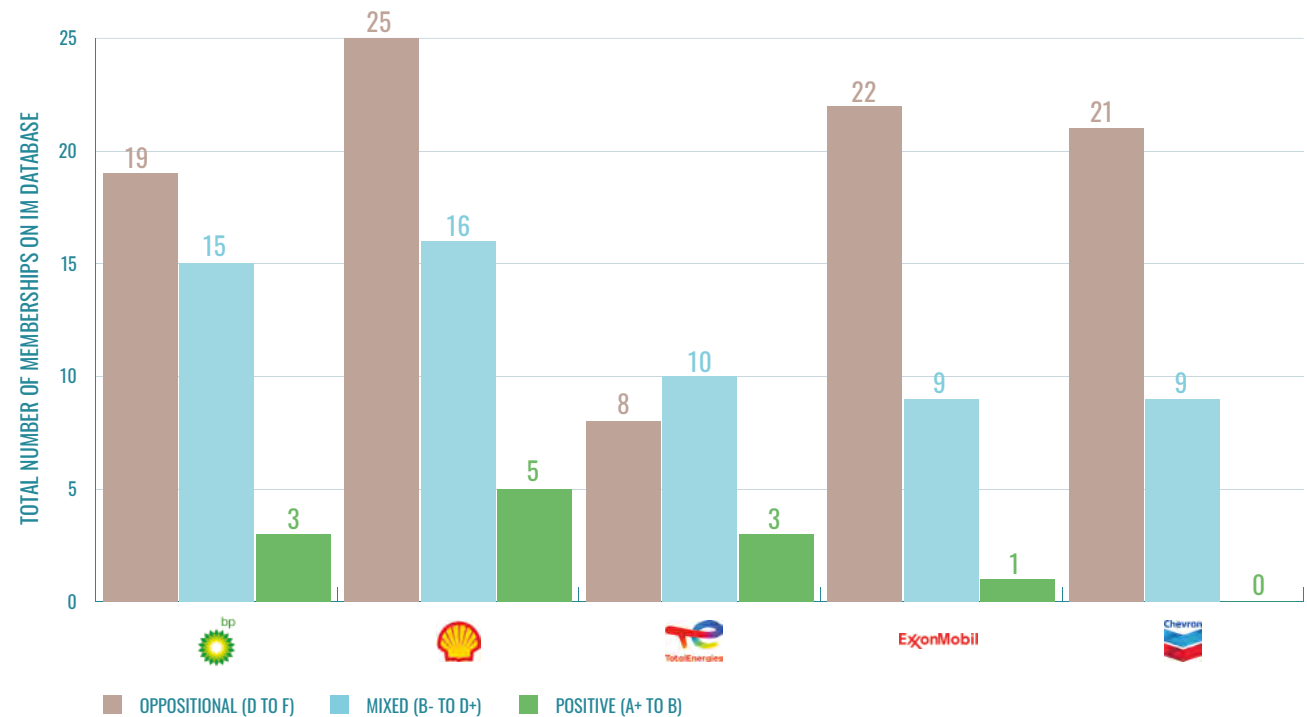


Table 14 includes a sample of the oil companies' industry associations globally, demonstrating the breadth of regressive lobbying across regions and the climate policy areas identified above. The policy engagement of these groups is highly contradictory to the image presented by the companies to the public on climate change. Short summaries on the policy engagements referenced in the table can be found in Appendix D and full profiles can be found on LobbyMap through the links provided.

Table 14: Summary of Engagement on Key Policy Areas (as of Aug 2022)

Industry Association (InfluenceMap Grade)	Members	Oil and Gas Production	Fossil Gas vs Electrification and Renewables	Methane Emissions Regulations
<i>American Petroleum Institute</i> (F)	BP, Chevron, ExxonMobil, Shell	Negative	Negative	Negative
<i>American Fuel & Petrochemical Manufacturers</i> (F)	ExxonMobil, Chevron	Negative	Negative	Negative
<i>Australian Petroleum Production & Exploration Association</i> (E+)	BP, ExxonMobil, Chevron, Shell	Negative	Negative	N/A
<i>Canadian Association of Petroleum Producers</i> (E)	Chevron, Shell, BP, ExxonMobil	Negative	N/A	Mixed
<i>Eurogas</i> (C-)	Shell, TotalEnergies	Negative	Negative	Negative
<i>FuelsEurope</i> (D)	Shell, BP, ExxonMobil, TotalEnergies	Negative	Negative	N/A
<i>International Oil and Gas Producers</i> (D)	BP, Chevron, Shell, TotalEnergies, ExxonMobil	Negative	Negative	Negative

KEY

Negative	The entity has directly engaged policymakers on the policy area with negative position/s (misaligned from Paris-aligned climate policy or the science of the Intergovernmental Panel on Climate Change (IPCC))
Mixed	The entity has directly engaged policymakers on the policy area with mixed positions (a combination of positive and negative positions) or has not communicated a clear position overall when compared to Paris-aligned policy or the science of the IPCC.

Positive	The entity has directly engaged policymakers on the policy area with positive position/s (in alignment with Paris-aligned policy or the science of the IPCC)
N/A	InfluenceMap has not found evidence of direct engagement with policymakers on the policy area since 2021

Industry Association Reviews

The *Global Standard on Responsible Climate Lobbying* – instigated by investors and launched in March 2022 – highlights the need for companies to publish a detailed annual review to ensure that its climate policy engagement (direct and indirect via industry associations) is consistent with the 1.5C goal of the Paris Agreement. All five of the supermajors have published an industry association review within the past three years, although only BP and Shell appear to have repeated this process on an annual basis. InfluenceMap has developed a methodology for assessing the quality of industry association disclosures, benchmarked against the Global Standard and investor expectations outlined by the *PRI*, *IIGCC* and *Ceres*. A full ranking table of these reviews and access to the reviews are available on InfluenceMap’s CA100+ Investor hub [here](#).

Shell has the highest ‘Review Score’ of the major companies to have produced a review that InfluenceMap has assessed thus far and shows leading practice in some areas. However, all five supermajors have failed to identify examples of their industry associations actively holding back ambitious climate policy. For example, Shell and BP included in their disclosures that the American Petroleum Institute has stated it supports the direct federal regulation of methane emissions. Neither company, however, disclosed that API took an *oppositional position* to the EPA’s proposed methane emissions standards in January 2022. Moreover, despite the group scoring an ‘F’ under the LobbyMap platform, ExxonMobil *found* the American Petroleum Institute to be ‘aligned with supporting society’s ambition to achieve a net zero future’.

Followingly, the supermajors’ efforts to address regressive climate lobbying by their industry associations has been highly inconsistent. The companies have disclosed examples of them acting inside of their their industry associations to improve the groups’ policy positions and, in certain cases, leaving industry associations after continued disagreement (for example, TotalEnergies announced in January 2021 that it had decided not to renew its membership to the American Petroleum Institute due to the association’s continued opposition to electric vehicles and methane emissions regulations). However, this effort appears to cover only a small proportion of the regressive climate lobbying the supermajors’ industry associations are engaged with overall.

Table 15: Assessment of the Supermajors’ Industry Association Reviews

Company	Sector	Region	InfluenceMap Review Score (0-100)
Shell PLC	Oil & Gas	Europe	64
BP	Oil & Gas	Europe	50
TotalEnergies	Oil & Gas	Europe	43
ExxonMobil	Oil & Gas	U.S.	36
Chevron	Oil & Gas	U.S.	14

Appendix A - Methodologies

Public Communications

Definitions

For this report, public communications are defined as messaging over any company-owned communication channel that is used to inform the public or media. This includes company and CEO social media (Facebook, Instagram, Twitter, YouTube, and LinkedIn where available), corporate websites including media centers/newsrooms (press releases, reports, country pages, speeches, magazines depending on contents of media center/newsroom), and secondary websites designed as blogs or intended for outreach purposes.

It is recognized that public communication channels have several functions for a company, including

- **Marketing** - Defined by the *American Marketing Association* as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large”.
- **Public Relations (PR)** - Largely *understood* as “the set of techniques and strategies related to managing how information about an individual or company is disseminated to the public, and especially the media”. Distinguished from marketing by the focus on the public image of the company, rather than efforts to promote a specific product or set of products.

- **Public Policy Engagement** - Companies also use their public communication channels to influence public discourse on topics that are important to them. The 2013 *UN Guide for Responsible Corporate Engagement in Climate Policy* defines policy engagement as consisting of activities including advertising, social media and sponsoring research, alongside more traditionally recognized activities such as direct contact with regulators, funding of campaigns and political parties, and participation in policy advisory committees.

These categories have areas of overlap. For example, PR and marketing campaigns that concentrate on promoting the value of the company and its products to society at large may have an impact on the public narrative on policy issues such as climate change. This research focuses on public communications in general, cover marketing, PR and public policy engagement functions.

Data Selection

The research aimed to collect as much data on the company's public communications as possible over the course of a single year (January – December 2021), with data sources selected based on the definition of public communications provided above. Only channels where InfluenceMap could access every instance of communication (e.g. each tweet, blog post or press release) over the course of the year were selected. Certain channels, for example the companies' profiles on Meta's Advertising platform, were excluded on this basis. InfluenceMap also restricted the scope of the research to the company's

main corporate communications channel for each source (for example, Shell PLC's Facebook page rather than Shell Nigeria's Facebook page).

Each company had different available sources to analyze, for example BP's CEO has an Instagram while ExxonMobil's CEO has no public social media accounts, while TotalEnergies' media center contained more sources than Chevron's. The full list of which sources were analyzed for each company can be found in the Appendix B. In total, InfluenceMap analyzed 3,421 individual pieces of evidence were analyzed for the five companies over the course of 2021.

Research Process

Two separate assessment process were applied to each evidence item collected:

- **Climate Relevance:** The first assesses the extent to which the communication activities focused on climate-relevant topics, first developed for InfluenceMap's 2019 *Big Oil's Real Agenda on Climate Change*. Each output from the communications channel (e.g. tweet, blog post, press release, etc) is assessed to understand the extent to which the communication focused on topics that are climate relevant (assessed on a scale between 0.0 for no relevance to 1.0 for full relevance). The definition of climate-relevance used is broad, encompassing communications specifically addressing issues such as GHG emission reductions and renewable energies (assessed to be fully climate-relevant) as well as issues such as oil and gas production or the benefits of the oil and gas industry to society are (assessed to be increasingly less climate-relevant). Types of evidence that are classified as not climate relevant includes those covering topics such as job advertisements, and product-specific communications e.g. TotalEnergies' Quartz Engine Oil. The analysis also factored in the proportion of the communication (e.g., press

release) that focused on the climate-relevant topic covered (i.e., from being the focus on the communication, to being a passing reference).

- **Messaging Strategies:** Each evidence item is also assessed using the taxonomy and methodology developed for InfluenceMap's previous report *Climate Change and Digital Advertising: The Oil and Gas Industry's Digital Advertising Strategy* (August 2021). The aim here was to understand the main narratives deployed within the company's climate-relevant public communications. The taxonomy includes four broad categories based on *Miller and Lelli's (2016)* work looking at audience responses to ads from fossil fuel companies. Each evidence piece can contain more than one claim and all evidence pieces were analyzed for the full range of narratives. The four categories are:
 1. **Climate Solutions:** claims emphasizing company commitment, support for or investments in emissions reduction activities, transitioning the energy mix, or 'green' fossil fuels.
 2. **Community & Economy:** claims about the benefits of the oil & gas industry to economies national or local, jobs, philanthropy, and social issues such as gender equality or sustainable development
 3. **Pragmatic Energy Mix:** claims about the benefits of oil & gas for affordability, reliability and maintaining quality of life (for example through the use of oil and gas to develop plastic-based products such as toothbrushes, etc.)
 4. **Patriotic Energy Mix:** claims about the benefits of oil & gas or the oil & gas industry to energy security, energy independence, or energy identities/histories)

For this report, these categories have been combined and are referred to in the following way:

Category	Type of Claim
Green Claims	(1) Climate Solutions
Oil & Gas Claims	(2) Community & Economy, (3) Pragmatic Energy Mix, (4) Patriotic Energy Mix

After all the output from the companies' public messaging channels have been analyzed against this taxonomy, the data was aggregated to assess the public communications strategies for each of the supermajors individually and as a collective.

Policy Engagement

InfluenceMap's LobbyMap platform is the world-leading program for tracking and assessing corporate climate policy engagement. InfluenceMap uses the definition of policy engagement provided the 2013 [Guide for Responsible Corporate Engagement in Climate Policy](#) issued by the secretariat of the UNFCCC and the United Nations Environment Programme (UNEP) under the UN's Caring for Climate collaboration of the United Nations Global Compact (UN Global Compact). This document defines a list of corporate activities that can contribute to corporate climate engagement, including advertising, social media, public relations, sponsoring research, direct contact with regulators and elected officials, funding of campaigns and political parties, and participation in policy advisory committees. This translates to seven distinct data sources that feed the LobbyMap analysis.

Data Source	Description
1. Organizational Media	The main organizational web site of the company and its subsidiaries
2. Corporate media	Additional media communications controlled by the organization, including social media channels.
3. CDP disclosures	Responses to questions within CDP's system (12.3 a & 12.3c) related to climate policy engagement.
4. Regulatory consultations	Comments on regulatory consultation processes, including those obtained by InfluenceMap through Freedom of Information requests.
5. Reliable media	Reports of corporate climate policy engagement by well-established media.
6. Management messaging	Transcripts of statements by key executives of the entity under a variety of circumstances.
7. Financial disclosures	Submissions by the company to financial regulators.

InfluenceMap constantly reviews these data sources for evidence of engagement with a range of discrete categories of climate-relevant policy and regulation. Each evidence item is scored against Paris-aligned government and science-based benchmarks to produce company metrics and rankings. Additional information about the LobbyMap methodology can be found on the [InfluenceMap website](#).

Some of these sources overlap with those analyzed under public communications part of the research, described in the chapter above (e.g. 'Corporate Media' data source, which includes social media and press releases). As such, the companies' corporate media is subject to two different methodologies and assessed in different ways.

- First these data channels are assessed as part of a holistic analysis of the company's public communications over the course of one year (as described above).
- Secondly, where evidence of climate change policy engagement is identified across these data channels (i.e., communications that contained details of a company's positions towards or activities to influence climate-relevant government policy), these are additional subject to InfluenceMap's LobbyMap [methodology](#) for analyzing whether policy engagements are aligned with the goals of the Paris Agreement.

For the purposes of the report, InfluenceMap's analysis concentrates on a comparative analysis of what companies are communicating in their public communications, and what they are communicating in more private/direct communication channels with policymakers on climate-relevant regulations. As such, it primarily draws from evidence collected from the 'Regulatory Consultations' data channel set out above.

Business Operations

The aforementioned assessment areas are complemented by analysis of the companies' operational activities in 'Business Operations'. Concretely, the companies' operations in oil and gas are compared to those in green technologies using metrics on (a) physical asset forecast production and (b) capital expenditure. The companies' public disclosures (financial reports, website, press releases, etc.) are also analyzed for climate-related targets and reporting, such as net zero targets, emissions reduction targets, and green energy expansion plans.


The forecast production numbers used in this research are created by [Asset Resolution](#) on the basis of physical asset-level data. Specifically, this data maps

physical assets which are active in the production or generation of the relevant technologies to the companies which operate them. Forward-looking production data for these individual physical assets is then aggregated per company to create company-level indicators on the total production or capacity owned by the company over the coming years. For example, forward-looking production data for each of an supermajor's individual oil-producing assets, i.e. oil fields, are mapped out. The production forecasts for all of these individual assets are then aggregated to create a company-level view of how the major's upstream oil production will evolve over the coming years. This report specifically uses forward-looking data on the companies' upstream production of oil and gas, as well as on their owned generational capacity in renewable power.

Financial figures and other information publicly disclosed by the company are obtained from the most recent disclosures of the companies, as of May 2022. Where possible, capital expenditure figures are split into total capital expenditure and capital expenditure specifically dedicated to green or low carbon technologies. A lack of transparent data on this split means this research must rely on the companies' definitions of their green capital expenditures. These definitions differ between the assessed companies and are often opaque, with many of them choosing to include technologies such as fossil gas and gas-fired power within their "low carbon" investments.


Appendix B - Public Communication Sources Used per Company

Company	Type	Source	Number of Evidence Items	% Evidence items with Green Claims	% Evidence items with Oil and Gas Claims
	Social Media	Facebook	58	47	21
		Instagram	113	59	19
		Twitter	81	62	16
		LinkedIn	250	51	23
		YouTube	87	33	13
	CEO Social Media	CEO Instagram	97	72	14
		CEO LinkedIn	110	75	6
		CEO Twitter	N/A	N/A	N/A
	News/Media Centre (<i>News & Insights</i>)	Press Releases	92	72	7
		Publications/Reports	4	100	50
		Speeches	13	100	31
		Blog (<i>Reimagining Energy</i>)	52	85	27
		Shareholder Webzines	N/A	N/A	N/A
		Country Presence Pages	N/A	N/A	N/A
		Additional Media Centre Content	N/A	N/A	N/A
Podcast	Podcast	N/A	N/A	N/A	
BP Total			957	61	23



Company	Type	Source	Number of Evidence Items	% Evidence items with Green Claims	% Evidence items with Oil and Gas Claims
	Social Media	<i>Facebook</i>	136	45	43
		<i>Instagram</i>	5	27	55
		<i>Twitter</i>	162	52	20
		<i>LinkedIn</i>	147	52	20
		<i>YouTube</i>	24	46	42
	CEO Social Media	CEO Instagram	N/A		
		<i>CEO LinkedIn</i>	22	77	59
		CEO Twitter	N/A		
	News/Media Centre ('Newsroom')	<i>Press Releases, Articles & Features</i>	66	58	36
		<i>Publications/Reports</i>	5	100	100
		<i>Speeches</i>	N/A	N/A	N/A
		<i>Blog</i>	N/A	N/A	N/A
		Shareholder Webzines	N/A	N/A	N/A
		Additional Media Centre Content	N/A	N/A	N/A
		Podcast	N/A	N/A	N/A
Chevron Total			660	48	39

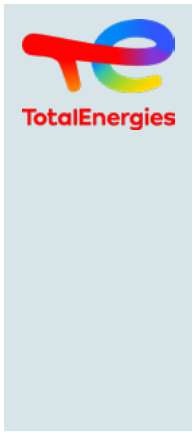

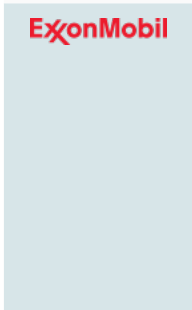
Company	Type	Source	Number of Evidence Items	% Evidence items with Green Claims	% Evidence items with Oil and Gas Claims
ExxonMobil	Social Media	Facebook	47	62	40
		Instagram	5	40	40
		Twitter	77	70	29
		LinkedIn	81	68	36
		YouTube	29	69	38
	CEO Social Media	CEO Instagram	N/A	N/A	N/A
		CEO LinkedIn	N/A	N/A	N/A
		CEO Twitter	N/A	N/A	N/A
	News/Media Centre ('News')	Press Releases	63	52	17
		Publications/Reports	3	100	100
		Speeches	3	67	33
		Blog ('Energy Factor')	21	81	38
		Country Presence Pages	N/A	N/A	N/A
		Shareholder Webzines	N/A	N/A	N/A
		Additional Media Centre Content	N/A	N/A	N/A
	Podcast	Podcast	N/A	N/A	N/A
	ExxonMobil Total			329	65

Company	Type	Source	Number of Evidence Items	% Evidence items with Green Claims	% Evidence items with Oil and Gas Claims
	Social Media	<i>Facebook</i>	3	33	67
		<i>Instagram</i>	5	100	0
		<i>Twitter</i>	114	81	2
		<i>LinkedIn</i>	89	71	1
		<i>YouTube</i>	47	60	13
	CEO Social Media	CEO Instagram	N/A	N/A	N/A
		<i>CEO LinkedIn</i>	26	77	12
		CEO Twitter	N/A	N/A	N/A
	News/Media Centre ('Media')	<i>Press Releases</i>	60	40	10
		<i>Publications/Reports</i>	2	100	100
		<i>Speeches</i>	1	100	100
		<i>Blog ('Inside Energy')</i>	13	92	38
		Country Presence Pages	N/A	N/A	N/A
		<i>Shareholder Webzines</i>	N/A	N/A	N/A
		Additional Media Centre Content	N/A	N/A	N/A
	Podcast	<i>Podcast</i>	10	100	20
	Shell PLC Total			370	70

Company	Type	Source	Number of Evidence Items	% Evidence items with Green Claims	% Evidence items with Oil and Gas Claims
	Social Media	<i>Facebook</i>	78	86	17
		<i>Instagram</i>	22	41	59
		<i>Twitter</i>	184	82	11
		<i>LinkedIn</i>	167	73	13
		<i>YouTube</i>	214	35	12
	CEO Social Media	CEO Instagram	N/A	N/A	N/A
		<i>CEO LinkedIn</i>	29	72	38
		<i>CEO Twitter</i>	79	48	24
	News/Media Centre (<i>'Media'</i>)	<i>Press Releases</i>	125	66	10
		<i>Publications/Reports</i> (includes 'projects')	37	54	16
		Speeches	N/A	N/A	N/A
		Blog	N/A	N/A	N/A
		<i>Country Presence Pages</i>	121	56	74
		<i>Shareholder Webzines</i>	6	100	33
		Additional Media Centre Content (includes 'articles', 'feature story', 'infographics,')	63	54	30
Podcast	Podcast	N/A	N/A	N/A	
TotalEnergies Total			1125	62	22

Appendix C – Overview of Company Disclosures

Company	Public Communications (Spend and Strategy)	Policy Engagement (Direct & via Industry Associations)	Business Operation Indicators (CAPEX and Oil and Gas output)
	<p>Limited disclosure: Only discloses operating and administrative expenses in annual report</p>	<p>Partial disclosure on direct engagement: Discloses positions on specific policies it has engaged with on its corporate website, however this list does not appear to be comprehensive.</p> <p>Partial disclosure on indirect engagement: Shell published an update to its 2021 industry association review, including a list of associations with the amount of payments to each, as well as actions taken to address misalignment. For associations where Shell has found misalignment in 2021, the 2022 update provides disclosures of Shell's role within the associations as well as the policy positions of the associations. However, for associations Shell has found to be aligned, only limited details are provided.</p>	<p>Partial disclosure: Shell has <i>disclosed</i> its cash capital expenditure and forecasts in its Annual Report, however it does not disclose what percentage of capex is being spent on renewable energy, only its 'Renewables and Energy Solutions', which includes fossil gas related activities. Shell does disclose its oil and gas production volumes in some countries in which it operates, but it does not appear to be comprehensive. Shell does not appear to include any detailed oil and gas production forecasts.</p>
	<p>Limited disclosure: Only discloses operating and administrative expenses in annual report</p>	<p>Partial disclosure on direct engagement: BP has disclosed its positions on several climate change policies relevant to its operations, and has disclosed its engagement on climate policies, however this disclosure appears to only include US and European activities.</p> <p>Partial disclosure on indirect engagement: BP published its most recent Industry Association Climate Review in April 2022 in which it assessed its relationships to 51 associations. However, details beyond alignment are only included for associations where BP found some misalignment. BP does not disclose its roles within associations it has deemed to be aligned with, nor does it give details of the climate change policy positions and engagement activities of each trade association.</p>	<p>Partial disclosure: BP does not appear to disclose a detailed breakdown of its cash capital expenditure in its <i>Annual Report</i>, but has included this information in a separate <i>press release</i>. BP does appear to disclose oil and gas production volumes in most major counties in which it operates within its annual report. BP does not appear to include any detailed oil and gas production forecasts.</p>

	<p>Limited disclosure: Only discloses operating and administrative expenses in annual report</p>	<p>Partial disclosure on direct engagement: TotalEnergies has published some of its climate-related advocacy on its corporate website, such as submissions to EU policy and open/joint letters, however this list is not exhaustive and does not include advocacy in other regions where it operates.</p> <p>Partial disclosure on indirect engagement: TotalEnergies has disclosed its membership of 30 trade associations along with a climate review, but the review does not cover the full list of memberships the company holds and provides no further details of the company's role within each organization's governing bodies nor influence over their climate change policy positions.</p>	<p>Partial disclosure: TotalEnergies does include a breakdown of its cash capital expenditure and forecasts in its Annual Report. Also, the company appears to disclose its oil and gas production volumes in some countries in which it operates. TotalEnergies does not appear to include any detailed oil and gas production forecasts.</p>
	<p>Limited disclosure: Only discloses operating and administrative expenses in annual report</p>	<p>Limited disclosure on direct engagement: Chevron discloses positions on broad policy areas without detailing engagement on specific policies</p> <p>Limited disclosure on indirect engagement: Discloses engagement through only US-based industry associations, without detailing engagement on specific policies.</p>	<p>Partial disclosure: Chevron does not appear to disclose a detailed breakdown of its cash capital expenditure in its Annual Report, but has included this information in a separate press release. Chevron does disclose oil and gas production volumes in most major counties in which it operates within its Annual Report Supplement. Chevron does not appear to include any detailed oil and gas production forecasts.</p>
	<p>Limited disclosure: Only discloses operating and administrative expenses in annual report</p>	<p>Limited disclosure on direct engagement: Discloses engagement on few policies without specifying clear positions.</p> <p>Limited disclosure on indirect engagement: Discloses engagement through only US-based industry associations, without detailing engagement on specific policies.</p>	<p>Limited disclosure: ExxonMobil includes a breakdown of its cash capital expenditure for the previous year in its 2021 Annual Report but does not appear to include a forecast. Exxon's 'Low Carbon' cash capital expenditure forecast can be attained through its 2021 'Corporate Plan Update'. ExxonMobil does not appear to disclose its oil and gas production by country in its 2021 Annual Report, only disclosing by continent, nor does it include any production forecasts.</p>

Appendix D - Industry Association Summaries

American Fuel & Petrochemical Manufacturers

InfluenceMap Grade: F

American Fuel & Petrochemical Manufacturers (AFPM) is an industry association representing the fuel and petrochemical industry in the US. AFPM advocates for policies to expand oil and gas production, including infrastructure. In June 2022, AFPM sent a letter to the US Secretary of Energy, Jennifer Granholm *advocating* for policy support for additional fossil fuel infrastructure and removal of restrictions on oil and gas development. AFPM also appears to be active at the state-level and opposes ambitious policies on energy transition and emissions reduction. In November 2021, AFPM *opposed* Maine's Advanced Clean Truck Program that sought to place annual sales requirements for Zero-Emission Vehicles (ZEV) and Near Zero Emission Vehicles (NZEV). AFPM's comments to EPA's methane regulation in January 2022 *did not support* the proposals and went on to endorse *API's oppositional comments* on the issue.

American Petroleum Institute

InfluenceMap Grade: F

The *American Petroleum Institute* (API) is an industry association representing the US oil and gas industry. API actively engages with policymakers at the federal and state level in the US on a broad range of policy issues related to climate change, energy transition, and emissions reductions. In June 2022, API wrote a letter to the US President, actively *advocating* in favor of expanding oil and gas production in the US, particularly through the continuation of federal onshore and offshore leasing and the easing of the infrastructure review process under the National Environmental Policy Act. API appears to oppose most forms of ambitious climate-related policies. For instance, API's letter to the Connecticut Joint Committee on Environment in March 2022 *did not support* the electrification of medium and heavy-duty trucks. Further, API's comments to the US Environmental Protection Agency in February 2022 attempted to *weaken* multiple proposals in the methane regulations, describing them as "unnecessarily burdensome".

Canadian Association of Petroleum Producers

InfluenceMap Grade: E

The *Canadian Association of Petroleum Producers* (CAPP) is an industry association representing the upstream oil and gas industry in Canada. CAPP is actively engaged with Canadian federal and provincial governments and advocates for policies that favor the oil and gas industry. In June 2022, CAPP's registration of lobbying activities with the Office of the Commissioner of Lobbying of Canada reported that it had *advocated* to the Canadian federal government for additional fossil fuel investments and infrastructure, including support for the Bay du Nord offshore oil project in Canada. CAPP's registration with the Alberta Lobbyist Registry has revealed that it *suggested* that the methane emissions legislation in the province should be cost-effective and flexible.

Australia Petroleum Production & Exploration Association

InfluenceMap Grade: E+

Australia Petroleum Production & Exploration Association (APPEA) has strongly promoted the role of fossil gas in Australia's current and future energy mix, while also seemingly promoting alternative fuels that have been derived from fossil fuels, such as blue hydrogen. In February 2022, then CEO Andrew McConville *appeared to support* the EU's decision to classify natural gas as a sustainable activity in the taxonomy. In August 2021, APPEA submitted a response to Victoria's Gas Substitution Roadmap which *strongly advocated* for the continued use of natural gas as part of Victoria's energy system, adding that ruling out natural gas would be "short-sighted". Then CEO Andrew McConville also testified to the Joint Standing Committee On Trade And Investment Growth's Public Hearing on Prudential regulation of investment in Australia's export industries in June 2021, where *he stated that* the IEA's Net-Zero scenario was 'just one pathway' and 'unrealistic', while going on to state support for natural gas in the energy mix. In April 2021, APPEA made a submission to the inquiry into the prudential regulation of investment in Australia's export industries, where it *stated* the importance to Australia to develop its oil and gas reserves and that the capital to do so was being constrained by the finance sector, fueled by 'political agendas of shareholder activists'.

Eurogas

InfluenceMap Grade: C-

Eurogas appear to advocate for the continued role of fossil gas in the energy mix. The industry association did *not support* the abolition of exemptions for long-term fossil gas contracts, in its June 2022 public consultation response on the EU Hydrogen and Gas Decarbonization Package. Eurogas *advocated* for the inclusion of fossil gas technologies in the energy savings obligation measure, within its November 2021 feedback comments on the EU Energy Efficiency Directive. The industry association also *called* for the EU Renewable Energy Directive to widen its scope of fuels to include non-renewable, low-carbon fuels in its November 2021 feedback comments. Despite stating *support* for the EU's 2030 GHG emission reduction target of 55% in June 2021, Eurogas supported *weakening* elements of the EU's Methane Regulation for the energy sector in April 2022 feedback comments.

FuelsEurope

InfluenceMap Grade: D

FuelsEurope seems to have mostly negative engagement with specific climate regulations and the transition of the energy mix. The association has consistently *not supported* reforms to strengthen the EU ETS, for example in a joint statement in February 2022, where it advocated for strengthened carbon leakage protection measures, including a “sufficient” level of free allocation of emissions allowances, and did not support many proposed reforms to mechanisms such as the Market Stability Reserve. In the same month, the association *supported* the EU's CBAM, whilst advocating for the continuation of current carbon leakage protection measures under the EU ETS until at least 2030, a position which is misaligned with the EU Commission, and supported the inclusion of export rebates. In a March 2022 open letter to the French President, FuelsEurope Director General John Cooper *opposed* the EU's 2035 effective ICE phase-out date and called for the long-term role of hybrid vehicles post-2035.

International Association of Oil and Gas Producers

InfluenceMap Grade: D

The *International Association of Oil and Gas producers* (IOGP) *stated* that setting a phase out date for unabated fossil gas would be “counterproductive” in May 2022 comments on the EU Hydrogen and Gas Decarbonization Package. The industry association also *supported* the inclusion of non-renewable, low-carbon fuels in the EU Renewable Energy Directive, in November 2021 feedback comments. IOGP, *advocated* for fossil gas technologies to count towards energy savings obligations in the EU Energy Efficiency Directive, emphasizing the role of fossil gas boilers in its November 2021 feedback comments. IOGP also emphasized the financial burden of measures in its April 2022 comments on the EU Methane Regulation for the energy sector, and *opposed* the proposed flaring standards.