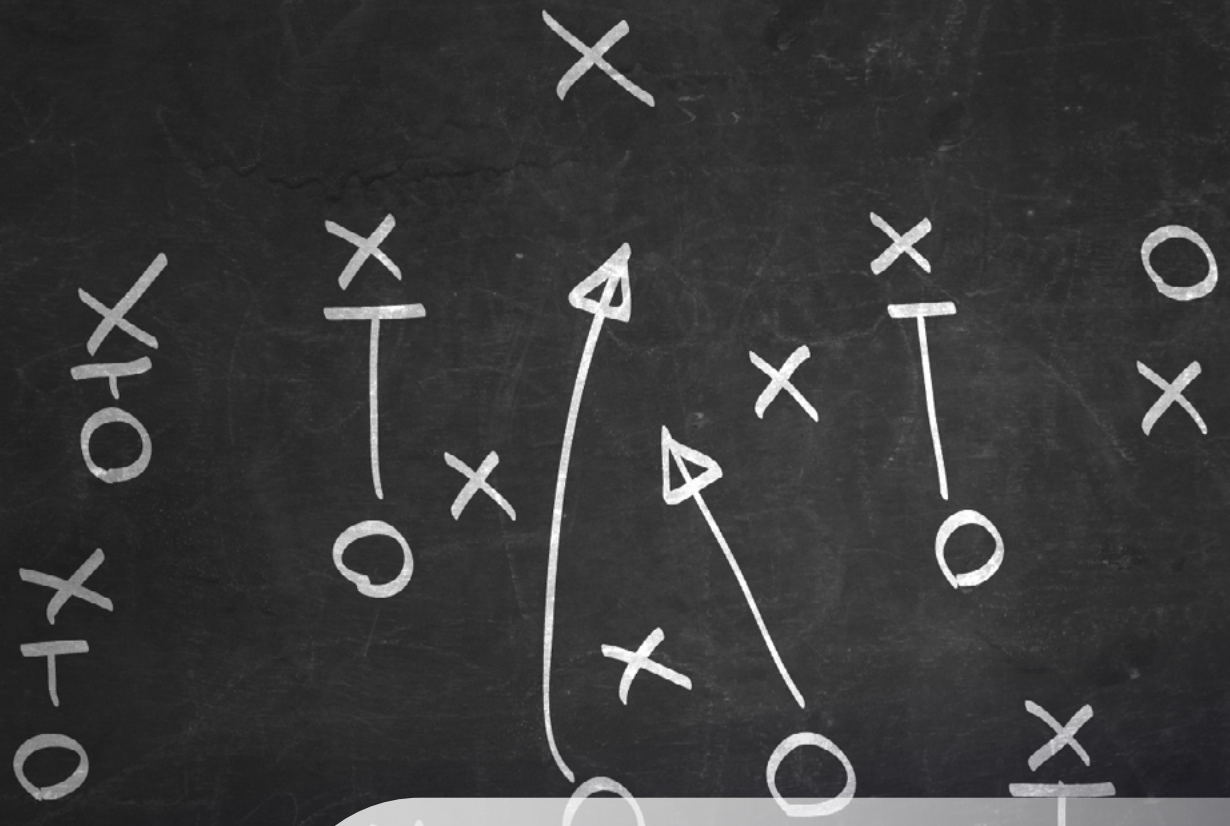
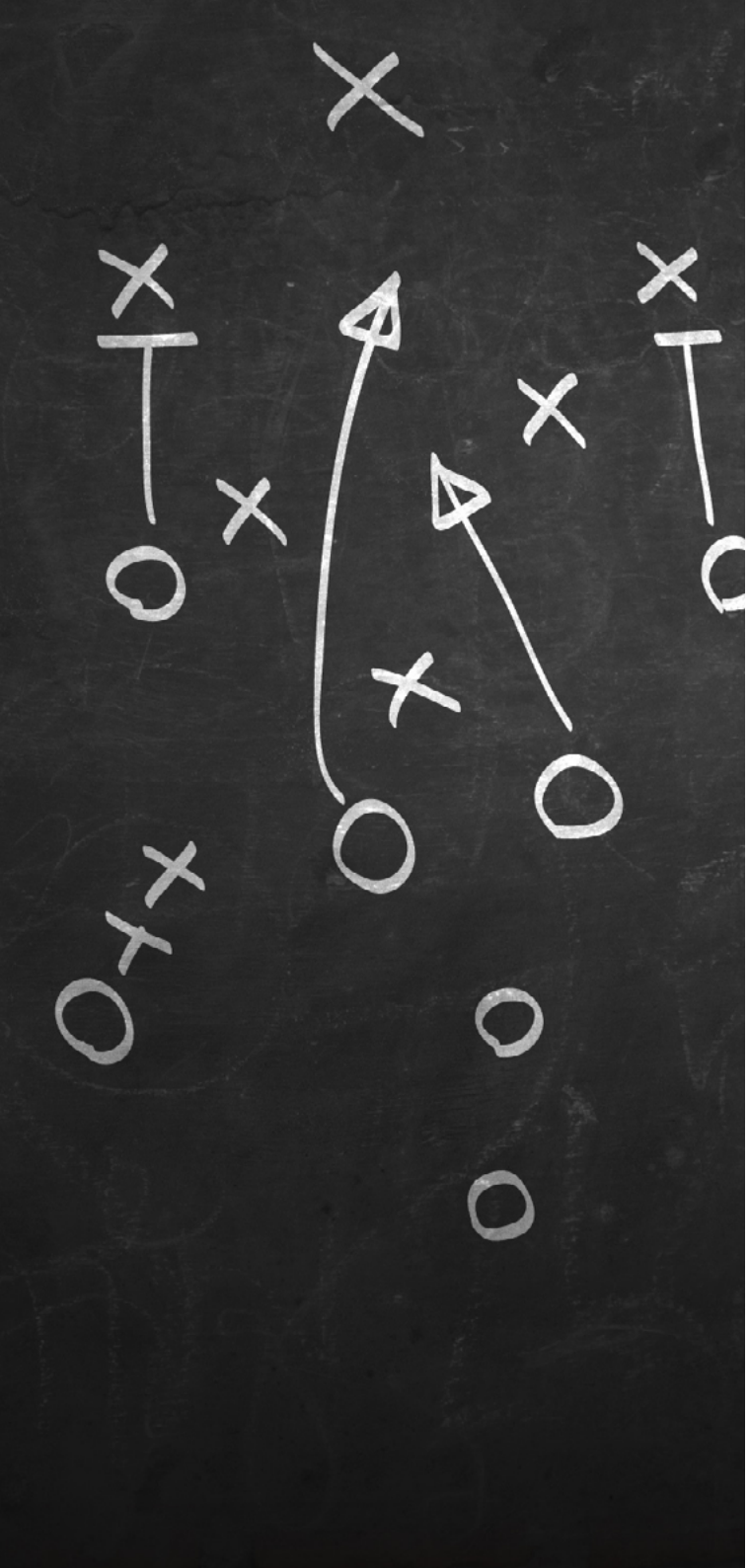


InfluenceMap

The International Gas Union's Climate Strategy

What the IGU reveals about the industry's global playbook to lock in fossil gas

December 2022



Contents

Executive Summary 3

Introduction 6

IGU's Communications Strategy 13

IGU's Advocacy & Outreach Strategy 27

Conclusion 35

Appendix 36

It is noted that logos of companies, industry associations and other organizations 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 entities concerned with the report's content.

Executive Summary

- This analysis considers a collection of strategy documents detailing the International Gas Union's (IGU) communications, advocacy, and outreach playbooks. As IGU is a major spokesperson for the sector, this analysis provides unique and highly significant insights into how the fossil gas industry has sought to defend and enhance its interests against increasing concern about climate change and the energy transition from the public, politicians, and international institutions.
- In the strategy documents, IGU states that the debate on climate change could be "potentially existential for the global natural gas value chain" and "Potential regulatory changes combined with a restriction of liquidity to the sector could have highly damaging effects to the industry." Subsequently, IGU stated that it is not in the interest of IGU to "ignore the issue, but to find a positive message to defend and enhance the role of gas in the global energy dynamic."
- In August 2021, the Intergovernmental Panel on Climate Change (IPCC) released its paper on the '*Physical Science Basis*' for climate change, which was described by Secretary-General Antonio Guterres as a "*code red for humanity*", after it made clear the impacts increasing global temperatures were having on biodiversity, food and water security, extreme weather, and human health and wellbeing. In its later report *'Mitigation of Climate Change'* (April 2022), the IPCC states limiting global warming requires a significant reduction in the use of fossil fuels, including the use of fossil gas.
- Analysis of IGU's strategy documents show the organization has developed a global playbook of regionally specific communication strategies to promote fossil gas based on the "environmental-consciousness" of the market. In Europe, this appears to include a focus on the "greening of gas", which presents fossil gas as part of a broader category of 'gases', including "low-carbon" and "decarbonized" gases. For Africa, parts of Asia, and South America, IGU's proposed communications strategies focus on the use of UN Sustainable Development Goals to "broaden the terms of the energy and climate debate", emphasizing the issues of energy poverty and clean air.
- The global playbook included messaging strategies to promote Russian gas, in particular as a replacement to coal, as well as LNG from North America, using messages around "secure energy", energy access, and reducing air pollution. A document from 2021 indicates that IGU predicted, and sought to prepare for, a "black swan event upending [the] global political agenda" occurring in 2022-2025.
- Through InfluenceMap's LobbyMap system, which tracks corporate and industry association lobbying on climate policies globally, this research shows that members of the IGU used similar narratives to promote Russian gas before the invasion of Ukraine. Since the invasion, InfluenceMap has seen an increase in the use of narratives promoting US LNG for energy security from members of IGU, as well as the industry more broadly.

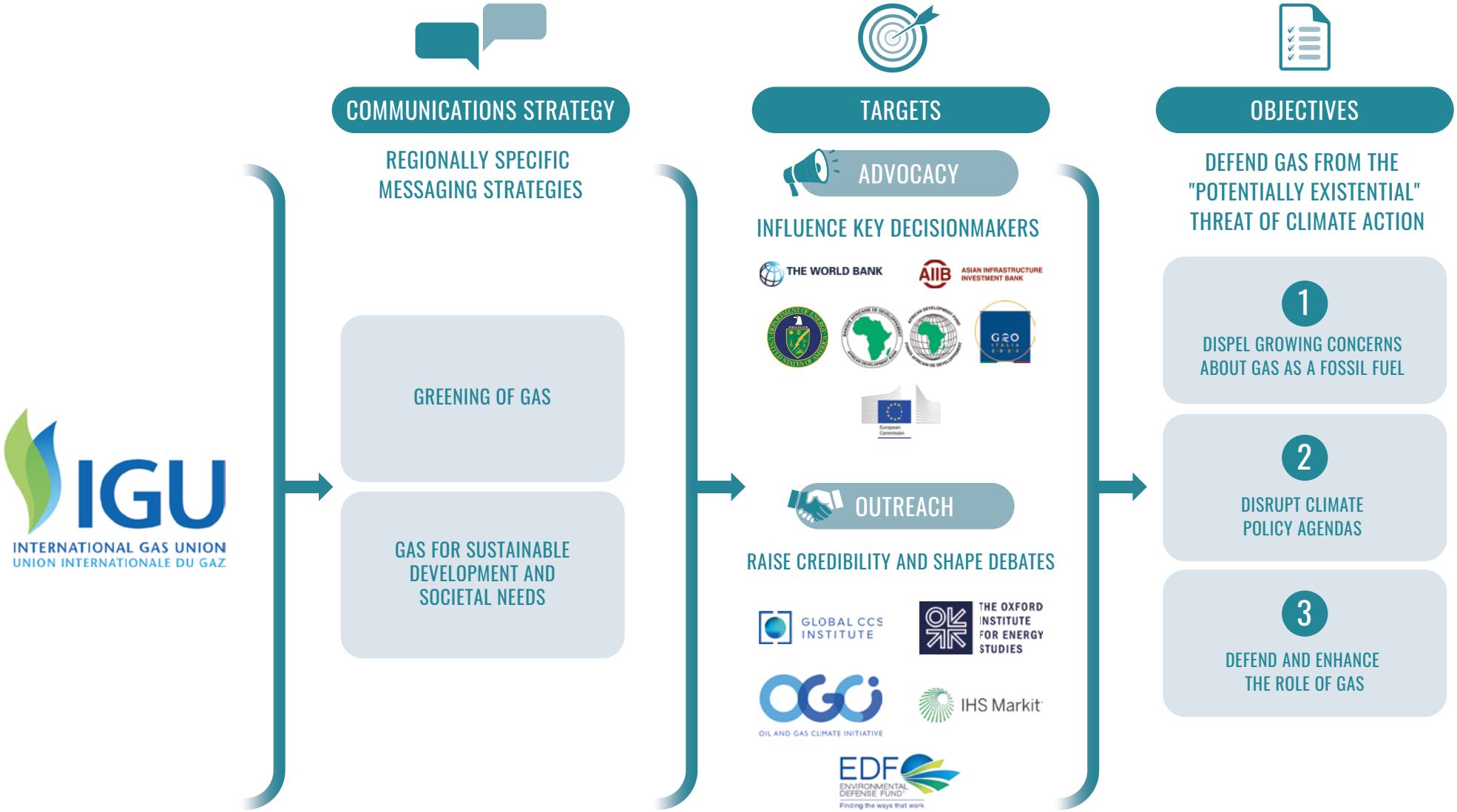
- IGU's strategy documents also set out the organization's "advocacy" strategy, showing a targeting of key global institutions, including the UN, the G20, World Bank Group, International Monetary Fund, and several regional development banks. IGU described engaging with these entities as "critically important, as they can be influential in the fuel choice that countries make."
- Further documents show that IGU has sought to develop relationships with key partners in the media (including the Financial Times and Bloomberg), environmental organizations (including Environmental Defense Fund and Rocky Mountains Institute) and think tanks and consultancies (including Boston Consulting Group and Oxford Institute for Energy Studies). IGU's aim for its outreach is to "raise IGU's credibility and leadership amongst influential organizations to help shape energy dialogues and debates," while its use of the media looks to "promote positive sentiment toward, and broader definition of, gas".
- IGU describes itself as "the spokesperson for the gas industry worldwide". It has 150+ members including *Eurogas*, *Shell*, *TotalEnergies*, *Sempra Energy*, and *ExxonMobil* amongst others. Its members are highly active and successful in lobbying against climate policies globally, with wins for the gas industry across policies in Australia, Korea, the EU, US, and Vietnam amongst others. The documents analyzed for this research were available on IGU's website in September 2021- April 2022, when this research was conducted. As of September 2022, the documents have been removed. The documents are dated between 2017-2018 and November 2021. It is not known if there have been any changes since to IGU's strategy.

> This debate [on climate change] could be potentially existential for the global natural gas value chain [...] It is in the IGU's not [sic] interest to ignore the issue, but to find a positive message to defend and enhance the role of gas in the global energy dynamic.

The International Gas Union from a paper on its "Position on Climate Change and the Future Role of Gas"

IGU's Climate Playbook

IGU's Communications, Advocacy and Outreach Strategies, summarized by InfluenceMap



Introduction

The International Gas Union (IGU)

The IGU is an industry association representing the fossil gas sector. On its website, IGU describes its *mission* as "to advocate for gas as an integral part of a sustainable global energy system, and to promote the political, technical and economic progress of the gas industry." IGU *claims* to have over 150 members across 5 continents and represent over 90% of the global gas market.

IGU organizes the World Gas Conference, a high-level event that brings together policymakers and professionals from across the global gas industry value chain every three years. IGU organized its 28th *World Gas Conference* in Daegu, South Korea between 23rd to 27th May 2022. The event brought together over 6000 gas industry professionals representing more than 80 countries to discuss the recent technological and policy developments in the gas industry.

Messaging during the event reiterated the role of fossil gas for the future and stressed the need for increased fossil gas investments across the global energy markets. It included panels on fossil gas headed by executives from some of the largest oil and gas companies and industry associations such as KOGAS, ExxonMobil, Woodside Energy, BP, Petronas, TotalEnergies, Shell, Chevron, Cheniere, and World Petroleum Council. The event was also *attended* by leadership from the World Bank, United Nations Environment Program, International Maritime Organization, and International Energy Agency. IGU, in partnership with the International Energy Forum, also organizes the IGU-IEF Ministerial Gas Forum, an event that promotes gas industry dialogue with policymakers. June 2022 saw the transfer of the presidency of IGU from Korea to the People's Republic of China, until 2025.

IGU's Global Membership

A sample of IGU's key regional members. The organization's full membership covers 150+ groups across 5 continents, representing 90% of the gas market.

AFFILIATED ORGANIZATIONS INCLUDE :

Gas Infrastructure Europe

GERG
THE EUROPEAN GAS RESEARCH GROUP

WLPGA

NGVA Europe

** Suspended*

About this report

On routine inspection of IGU's webpage, InfluenceMap identified several documents detailing IGU's strategy for promoting the role of gas in relation to climate change and the global energy debate.

These documents include presentations from executive committee meetings, details of IGU's communications, outreach, and advocacy plans, position documents on climate change and the role of gas, reports on IGU task force activities, and documents evaluating IGU's strategic partnerships, amongst others. In total, InfluenceMap considered 49 documents from IGU spanning from 2015 to 2021. This report analyzes 11 of those documents. These documents were available on IGU's in September 2021-April 2022, when this research was conducted. As of September 2022, all the documents had been removed. The documents and extracts used in this report were chosen based on their relevance to IGU's strategy to promote gas in relation to climate change and global energy debates and as such focus on the communications, outreach, and advocacy strategies detailed by IGU. The classification of 'Communications', 'Outreach' and 'Advocacy' follows IGU's own classification of its public affairs objectives (Document A, extract 1), which are summarized by InfluenceMap as the following:

- **Communications:** Promoting positive sentiment towards and social acceptance of fossil gas in relation to climate change and energy debates.
- **Advocacy:** Influencing policymakers to implement favourable policies towards fossil gas.
- **Outreach:** Increasing the credibility of IGU and its ability to influence influential organizations.

Additionally, the documents contained information pertaining to ensuring alignment around IGU's position amongst its members and measuring progress on the above objectives. These objectives were not deemed relevant to this analysis, and therefore, were not included.

The analysis focuses on the more recent documents, with the majority of the documents used dating from 2021. Documents from 2020, 2019, and possibly 2017-18 (the document in question is undated) have been included where relevant to the discussion. The most recent document is dated November 2021. As such, the report is unable to comment on whether IGU's current strategy for communications, advocacy, and outreach has changed from that time.

In addition to an analysis of IGU's documents, InfluenceMap juxtaposes IGU's strategies with examples of 'real-world' advocacy from some of its members over a similar period, taken from InfluenceMap's *LobbyMap* platform which tracks and assesses the climate policy engagement of over 400 companies and 200 industry associations globally, including IGU and many of its members. The purpose of this is to demonstrate similarities in the real-world policy influencing of the global gas industry and the strategies detailed by IGU in its documents.

Despite repeated warnings from independent international bodies including the *Intergovernmental Panel on Climate Change,* the *International Energy Agency*, and the *International Institute for Sustainable Development,* the world is on track for increasing global warming with current climate pledges roughly aligned with a *2.5C* scenario by 2100. In this report, InfluenceMap compares statements from the IGU's communication strategies for promoting fossil gas to findings from

the IPCC's 'Mitigation of Climate Change' report, demonstrating the core areas of misalignment between the scientific findings of the IPCC and the promotional strategies of IGU.

The IPCC has identified "incumbent" fossil fuel interests "exerting political influence" (*Mitigation of Climate Change, April 2022*) over the policymaking process as a key reason for the lack of progress on climate policy globally. This report presents an insight into the strategies developed by the "spokesperson" of the global gas industry to protect and promote the role of fossil gas against the "potentially existential" (Document B, extract 1) threat of climate change "to the global natural gas value chain" (Document B, extract 1).

Table: Documents Used in Report

Document	Description	How it was used for this report	Extracts in Appendix
Document A	Document A is a presentation from the **'IGU Executive Committee Meeting, Videoconference Session'**, dated May 18th 2021. The document contains details on staffing, discussion on the IGU's updated position on climate change and the future role of gas, and updated communications, outreach, and advocacy plan, as well as a public affairs budget.	Within Document A is a slide listing IGU's Public Affairs objectives for communications, advocacy, and outreach. This slide was used as evidence of IGU's objectives in these areas. A slide on IGU's expected developments and priorities from 2022-2025 was also used	Document A, extract 1 Document A, extract 2
Document B	Document B is a document detailing the **'IGU Position on Climate Change and the Future Role of Gas, last updated May 13th 2021'**. The document was last updated 13th May 2021 and appears to have been used in the Executive Meeting on 18th and 19th May 2021, in relation to Agenda Item 4. The document includes a discussion on the updated position, including the background to the update and IGU's new positions.	This document was used to discuss the potential motive for IGU's updated climate change position.	Document B, extract 1 Document B, extract 2 Document B, extract 3
Document C	Document C is **'The Triennial Work Program 2018-2021'**. The Triennial Work Program 2018-2021 is undated but appears to have been developed in 2017-2018 with the start of the South Korean Presidency. The document states "it is the core document that defines the work and activities that IGU Committees and Task Forces will carry out during the next three years."	This document was used as evidence of the various committees and task forces in IGU and their remits.	Document C, extract 1 Document C, extract 2

Document D	Document D is **'The Online Coordination Committee Meeting'**, dated October 21st 2020. The document is a presentation which appeared to accompany an online meeting of the Coordination Committee. The presentation goes through the progress of the World Gas Conference organizing, and general updates from numerous committees, and includes a "Strategic Communications and Outreach Plan".	This document was used to describe the session planned for the 2021 World Gas Conference on 'Engaging in the Social Media Landscape'.	Document D, extract 1 Document D, extract 2
Document E	Document E is titled the **'Updated Communications, Outreach, and Advocacy Plan'**. The document states it was last updated 4th May 2021 and was used in the Executive Meeting on 18th and 19th May 2021 in relation to agenda item 5. This document is an update to the 2021 Communication, Outreach, and Advocacy plan following the IGU's new policy position. The document includes an expanded communication, outreach and advocacy plan including situation analysis, objectives, stakeholders, and regionally developed messaging strategies. The document also describes IGU's communications approach and tactics, including for the Italian G20 2021 meeting and COP26, as well as IGU's advocacy approach and tactics.	Document E was used in the discussion of IGU's broadened definition of fossil gas. Document E also contained slides on its global 'messaging architecture', which contained messaging to promote fossil gas to and from different regions of the world. Document E was also used for its 'Matrix of Key Stakeholders', which outlined the entities IGU wanted to target for its communications, advocacy and outreach strategy.	Document E, extract 1 Document E, extract 2 Document E, extract 3 Document E, extract 4 Document E, extract 5 Document E, extract 6 Document E, extract 7 Document E, extract 8
Document F	Document F is an unnamed document that appears to be a **report by Task Force 2** on its progress. The document is undated but appears to have been written before Q3 2019, as the document ends "This will be discussed in the next Task Force meeting in 3Q19." The document includes case studies and recommendations for IGU. It also contains a list of Task Force Members and contributors during Phase 1 of Task Force 2's activities.	Document F was used in discussing Task Force 2 Energy For All and the Task Force members and contributors during Phase 1 of its activities.	Document F, extract 1 Document F, extract 2
Document G	Document G is a presentation from the **'Executive Committee Meeting' videoconference, dated November 3rd, 2021'**. The presentation provides an update on the communications, outreach and advocacy plan, including IGU's engagement at COP26. The presentation also appears to include updates from several of the committees and on the organizing of the World Gas Conference, including speakers and sponsorship. It also details membership changes, IGU's budget for 2022, deliverables for 2022, and the establishment of a new task force called the 'Carbon Neutrality Task Force'.	Document G was used as evidence of IGU's engagement strategies at COP and with key stakeholders.	Document G, extract 1 Document G, extract 2 Document G, extract 3 Document G, extract 4

Document H	Document H is the **'Annual Report 2020'**, last updated June 24th 2021, and used in an IGU Council Meeting between July 2nd-16th 2021. The document outlines IGU's 'vision and mission', events for 2020-2024, activities in 2020, and engagements with international organizations. It also details memberships and the individuals on the management team and executive committees.	Document H was used as evidence of IGU's engagement with several key stakeholders and why IGU deemed collaboration with these entities important.	Document H, extract 1
Document I	Document I is a document titled **'Towards Recovery and Shared Prosperity, Natural Gas Opportunities for a Sustainable World, Virtual Ministerial Roundtable, Hosted by the Government of Malaysia'**, and dated 3 December 2020. The document lays out the agenda for the meeting, including speakers and panel sessions.	Document I was used to discuss the Ministerial Gas Forum meeting hosted by IGU and International Energy Forum	Document I, extract 1
Document J	Document J is an **IGU Newsletter**, dated May 2021. It updates on IGU's advocacy, social media campaign, World Gas Conference and future events, as well as informing about upcoming meetings.	Document J is a newsletter to IGU members in May 2021. It was used as evidence of IGU's social media campaign and its impact on IGU's social media presence.	Document I, extract 1
Document K	Document K is a presentation from the **'IGU Executive Committee Meeting, EXC' Virtual Session'**, dated June 23rd 2021. Document K provides an update on the communication, outreach and advocacy plan, as well as presentations from the implementation team, pandemic advisory group, an update on flagship events, an overview of the 'IGU History Book', and membership changes. It also goes over the 2020 Annual report and IGU finances, and new secretary general. Finally, the presentation includes updates from 'regional coordinators'.	Document K was used for its update on IGU's outreach strategy with key think tanks and consultancies, as well as the regional updates on Europe and North America.	Document K, extract 1 Document K, extract 2 Document K, extract 3

IGU's Communications Strategy

This section will look at the communication strategies proposed by IGU in the strategy documents considered for this analysis, dated between 2017/2018-2021. It subsequently compares this to real-world examples of fossil gas advocacy from both IGU and its member companies since 2020. The analysis suggests the predominance of two communication strategies: the "greening of gas", and an emphasis on sustainable development. It highlights how these strategies appear to have been designed to respond dynamically to regional differences and emerging world events. Elements of IGU's communications strategy can be found across several documents but is summarized in Document A (IGU Executive Committee Meeting, Videoconference session, dated 18th May 2021).

Introduction

Objectives

In Document A, IGU lists two objectives for its communications:

- "Promote positive sentiment toward, and broader definition of, gas amongst key media and influencers
- Increase social acceptance of natural gas as distinct from other fossil fuels and of gas in all its forms as a key part of a transition to a clean and inclusive energy future." (Document A, extract 1)

In Document B (IGU Position on Climate Change and the Future Role of Gas, Document relates to agenda Item 4', dated 13th May 2021, extract 1), IGU writes that "in 2021 – five years since the declaration of the Paris Agreement – there is active global debate about

- Role and impact of energy
- Climate change, Paris Agreement, Nationally Determined Contributions, Greenhouse Gas Emissions, Net Zero Emissions, Decarbonization, and the Energy Transition
- Own Greenhouse Gas emissions of countries, cities and companies
- Challenges during, and pathways for, the Energy Transition"

IGU then states:

> " This debate could be potentially existential for the global natural gas value chain. Potential regulatory changes combined with a restriction of liquidity to the sector could have highly damaging effects to the industry. It is in the IGU's not [sic] interest to ignore the issue, but to find a positive message to defend and enhance the role of gas in the global energy dynamic."

This need to "get ahead of the discourse" is also discussed in a later document from June 2021 (Document K, extract 1). Under the 'North America' update, it states, "There is something of a perfect storm of public and activist policy targeting the gas sector" and describes the emissions reduction agenda of the government, coordinated campaigns to ban gas delivery, and activists pushing for divestment. At the end of the slide, it states "These are difficult times for the industry but, if it can remain nimble and get ahead of the discourse rather than just responding to it, it should weather this." That policy presents a threat to the gas industry can also be seen in the slide updating on 'Europe', where it is written "European gas competitiveness, flexibility, sustainability and innovation will continue being crucial for our industry especially considering the upcoming "*legislative tsunami*" that will address in the coming months almost every single aspect of the energy space in the region." (Document K, extract 2)

Key Strategies

In Document E (extract 1), IGU lays out its "Messaging Architecture: Three Global Themes". These are:

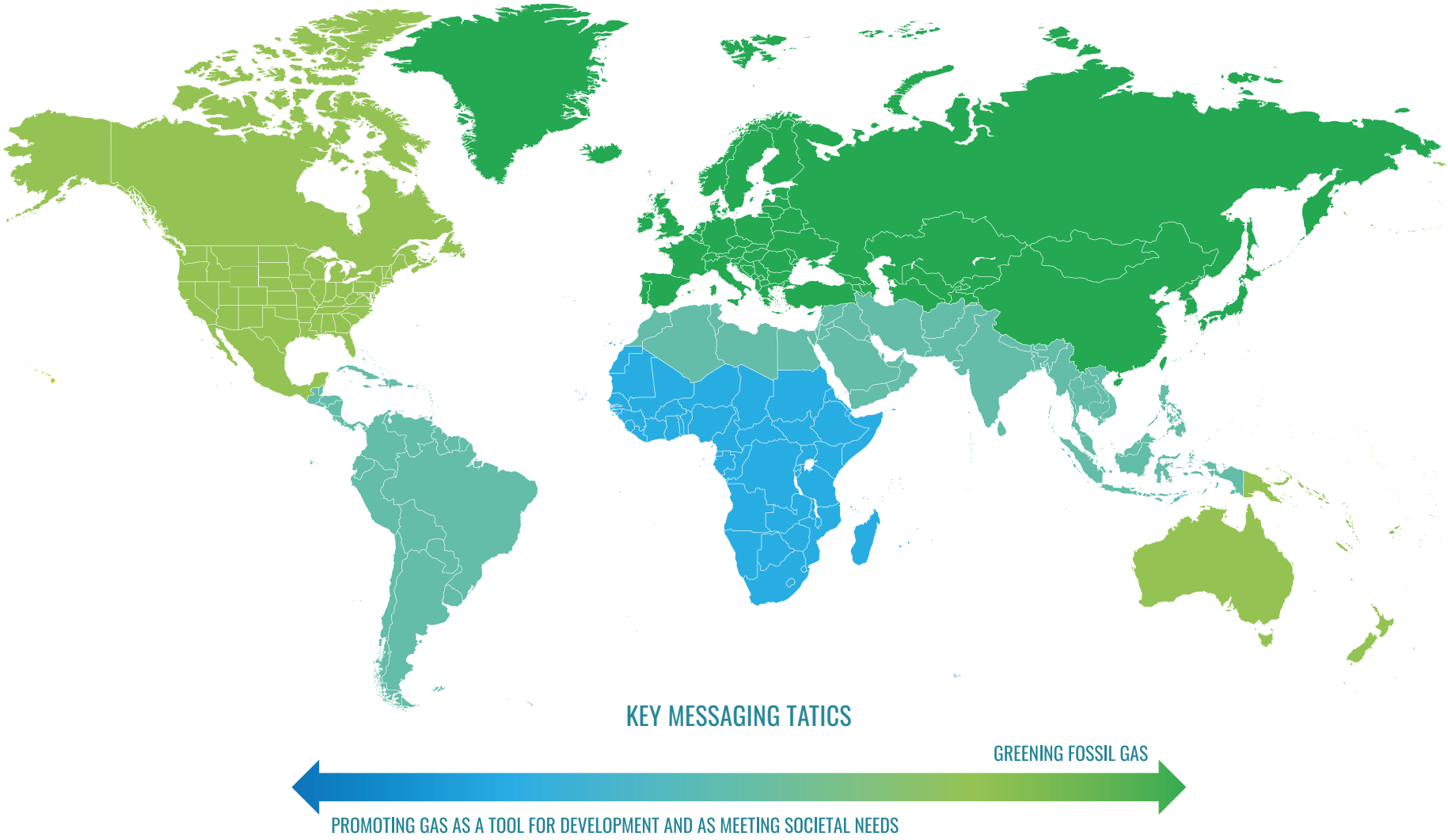
- "The gas industry supports and enables the global transition to an inclusive energy future"
- "Whilst every region's energy needs and concerns vary widely, every nation must balance four core energy needs - and the gas industry is uniquely positioned to meet each of them:
  - Maintain energy supply security and reliability
  - Reduce climate and environmental impact of energy supply and consumption
  - Provide access to energy to all citizens
  - Ensure affordability of energy prices"
- "Natural gas plays a positive and necessary role in meeting global needs for clean skies and significant carbon reduction".

IGU then proceeds to identify different regions for which messaging strategies will be developed, including Europe, Africa, Latin America & Caribbean and so forth, covering nine regions in total. These messaging strategies are presented in Document E, the 'Updated Communications, Outreach and Advocacy plan', (discussed in more detail later on in this report). From these regional messaging strategies, InfluenceMap has identified two key communications strategies for developing a "positive message" on fossil gas, depending on the target region. The remainder of this chapter will consider these two strategies in turn, as well as in the key below, they are:

- "Greening" fossil gas (focused on the EU in particular)
- Promoting gas as fulfilling key societal needs and as a tool for sustainable development (focused on the Global South)

IGU's Global Communication's Strategy to Promote Gas

A representation IGU's regional messaging tactics, based on an analysis of its communication strategy documents



Greening Gas

Analysis of IGU Strategy Documents

In markets that IGU defines as "environment-conscious markets", IGU's communication strategy has centered on the "greening of gas" (Document C, extract 1). In Document C (Triennial Work Program 2018-2021), IGU lists several working groups and their research remits. Study Group 3 of the Strategy Committee was tasked with determining the "long term strategy in environment-conscious markets". In its description it states:

> " the golden age of natural gas has been replaced with a more delicate view of the role of natural gas in the future energy mix. In particular, in mature markets with a growing consciousness for environmental matters, clients developed a fossil phobic attitude which includes natural gas. This role of gas needs to be examined and strategic solutions to return to an overall positive image of gas shall be developed. Thus 'gas' needs to be redefined, not only to cover natural gas, but including other, alternative gases, without fossil background. "
>
> **(Document C, extract 1)**

IGU describes this process as the "**greening of gas**" (Document C, extract 1).

IGU again comments on the process to "green" gas in Document D (Online Coordination Committee Meeting, dated October 21st, 2020), on a slide entitled "Developments in Strategy in 2020", IGU states that "At the begin of 2020, the objective was to "green" natural gas by admitting gases from renewable energies" (Document D, extract 1). Explaining this strategy, IGU states that the criticisms of fossil gas have increased "mainly on the issue of being fossil and being a major source for GHG emissions" and refers to the strategy of "activists", characterized by IGU as "we finished coal, shot the reputation of oil, now let's finish gas by giving them the blame for climate collapse" (Document D, extract 1).

The final bullet point on the "Developments in Strategy in 2020" slide states: "Option for the gas industry: safe [sic] the assets and the (changed) market by conveying renewable gases (hydrogen, biomethane) with some natural gas as back-up by

- Allowing admixtures (in many cases and applications, up to 20% hydrogen is feasible with the existing appliance population)
- Convert some natural gas grids and transport lines to "pure" hydrogen (problem: price control, Capex)
- Start developing naval transport of hydrogen, using the experience from LNG" (Document D, extract 1).

It is unclear from the document whether IGU is suggesting the gas industry pursue these options for their real-world decarbonization potential or whether it is suggesting these options primarily as narratives to sell pre-existing fossil gas assets and markets to the public and policymakers (or both).

In another document from 2021 - Document E (Updated Communications, Outreach and Advocacy Plan, document relates to agenda Item 5, last updated May 4th 2021, used for the IGU 2021 EXC electronic meeting on 18th and 19th

May 2021) - IGU has a slide entitled "Situation Analysis" (Document E, extract 2). On this slide, IGU states that "The energy landscape - and the debates that inform it - is shifting at an unprecedented pace." IGU then states that "Arguments and decisions are taking place right now that will define the energy mix for years to come" and that the "gas industry has not been driving key debates and has often found itself in a responsive and defensive position on important topics" (Document E, extract 2).

IGU states that in response, it is updating its position on core issues "including broadening its mandate to include renewable gases, decarbonised gases and low-carbon gases, in addition to natural gas" (Document E, extract 2). In its 2021 report *'Global Renewable and Low-Carbon Gas Report'*, it lists in the Appendix under "Types of Renewable Gases", biogas, biomethane, grey hydrogen (produced from gas through methane reforming), blue hydrogen (produced from fossil gas with CCS), and green hydrogen (produced using renewable electricity). As such, it appears IGU has labelled gases from non-renewable sources as 'renewable'. The term 'low-carbon gases' appears to be used interchangeably, being used to refer to biogas, biomethane, and 'low-carbon' hydrogen (defined as a "collective term for blue and green hydrogen").

On the same slide in Document E (extract 2), IGU states that "It is imperative that the IGU positions gas - defined more broadly - as a necessary part of the solution and as a vital component of the world's future energy mix." In Document E, IGU produces regionally specific narratives to promote gas. From these, the broadened definition of gas is used most in the European talking points. These include:

- "The gas industry has a major role to play in helping Europe meet its climate change mitigation ambitions: switching from coal to natural gas in power generation and heating (especially in Central and Eastern Europe); and taking full benefit of all European gas resources, natural, decarbonized and renewable.
- Renewable and low-carbon gases must play a significant role in Europe's future energy mix – including as EU reduces use of nuclear power. Biomethane, synthetic methane and hydrogen can all be used in stand-alone equipment or blended with natural gas in existing infrastructure. Increased use of these gases will make great contributions to delivering Europe's Paris goals" (Document E, extract 1)

Reference to 'renewable', 'low-carbon', or 'decarbonized' gases are also found in documents overviewing potential messaging strategies for Middle East and North Africa ("region is well positioned to lead the way in developing blue and green hydrogen and ammonia"), Russia ("efforts to decarbonize gas through pyrolysis"), South and Southeast Asia ("hydrogen biogas and renewable gases must be encouraged"), North Asia ("All three countries will play significant roles in manufacturing of electrolyzers for green hydrogen production"), and Oceania ("Oil and gas industry a significant investor/enabler of hydrogen") (all quotes taken from Document E, extract 1).

This expanded definition is directly linked to its facilitation of fossil gas advocacy. In Document E again, on a later slide entitled "Adjusting the Profile of IGU" (extract 3), IGU states that this expanded definition "provides IGU with a broader platform to engage in important energy debates and deepens rational for infrastructure investment for governments and development

banks." Furthermore, evidence demonstrates IGU using 'green gas' narratives in its advocacy on EU policy. In 2020, in a letter *co-signed* by 56 oil and gas corporations and industry associations, IGU advocated for fossil gas to be included in the EU's Sustainable Finance Taxonomy. IGU used arguments including "scaling up all decarbonisation options [...] including natural, renewable and decarbonized gases and CCUS technologies", as well as "deploying natural gas to continue displacing, wherever possible, coal in power generation and heating". The gas lobby was ultimately *successful* in weakening the EU's Sustainable Finance Taxonomy with the inclusion of fossil gas.

Examples from IGU

Use of these narratives by IGU can be seen in the examples opposite taken from IGU's LinkedIn page. In a post from early 2022, IGU stated it looked forward to continued positive engagement with the EU "based on a shared understanding of the strategic value of gas today and gases tomorrow". This post reshared another post from GasNaturally, an EU-based gas association made up of a partnership of eight fossil gas industry associations, which advocated for the promotion of "renewable and low-carbon gases" to the EU's gas package. In a further LinkedIn post from late Q3-4 2021, IGU stated "Natural gas today and a portfolio of natural gas, renewable and decarbonized gasses of tomorrow will be vital in ensuring secure, reliable, affordable and sustainable energy access for all global society".

IGU

IGU [...] is totally committed to positive engagement with EU institutions [...] based on a shared understanding of the strategic value of gas today and gases tomorrow as the catalyst for a foundation of a more sustainable energy system #gas #energy #sustainable"

Link to LinkedIn Post

IGU

"Natural gas today and a portfolio of natural gas, renewable and decarbonised gasses of tomorrow will be vital in ensuring secure, reliable, affordable and sustainable energy access for all global society."

Link to LinkedIn Post

Examples from IGU's Members' Lobbying

InfluenceMap has noted an increasing use of the terms 'renewable gases', 'decarbonised gases' and 'low-carbon gases' in efforts to promote the role of fossil gas within long-term climate and energy policy, primarily in Europe. In February 2022, InfluenceMap released a *report* demonstrating how the gas industry has been highly successful in achieving its policy demands in the EU. The report found that narratives promoting 'low-carbon gases' and 'decarbonized gases' were used by the gas industry to advocate for fossil gas-based solutions to be included in EU policies. Out of the 412 evidence pieces assessed for the report, 153 (37%) referenced blue hydrogen or broad categories such as low-carbon gases, decarbonized gases, and/or renewable gases, including (103) 25% which specifically referenced the latter broad categories of 'gasses'.

It is noted in the report that these terms are ambiguous on specific details, with no firm definitions provided by the sector on what is meant by 'decarbonized', 'renewable', or 'low carbon' when it comes to gas. For example, there is no attempt to specify the methods of production for creating 'low-carbon' or 'decarbonized' gas. Furthermore, InfluenceMap has found that these terms are regularly used in advocacy for a continued role for fossil gas in the near-term, on the basis that it will one day be 'low-carbon' or 'decarbonized'.

It is not possible to concretely conclude a clear line of causation between IGU's proposed communication strategies and the specific advocacy efforts of individual oil and gas players. However, it is noted that the narratives used in the lobbying activities of IGU members appear similar to the region-specific talking points IGU generated in Document E. On a slide titled "IGU Messages to and about Europe", IGU wrote:

- "Renewable and low-carbon gases must play a significant role in Europe's future energy mix [..] Biomethane, synthetic methane and hydrogen can all be used in stand-alone equipment or blended with natural gas in existing infrastructure. Increase[d] use of these gases will make great contributions to delivering Europe's Paris goals.
- Natural gas and hydrogen will play essential part in supporting renewable[s] as Europe continues its path to a cleaner energy future"
(Document E, extract 1)

> It is imperative that the IGU positions gas - defined more broadly - as a necessary part of the solution and as a vital component of the world's future energy mix.
>
> **(Document E, extract 2)**

The below table offers some examples of IGU's members and affiliated organizations using similar 'green gas' narratives:

IGU Member/Affiliate	Lobbying Evidence
Eurogas	In May 2021, Eurogas, *advocated* the EU Renewable Energy Directive (RED) included binding targets for "all renewable and decarbonized gases", without proposing clear criteria for which gases would be incentivized.
Snam	In its February 2021 legislative consultation response, Snam *called for* the inclusion of low-carbon fuels in the RED revision and giving member states the option for them to count towards renewable energy targets.
GasNaturally	In November-December 2021, IGU posted on LinkedIn to support GasNaturally's lobbying efforts on the EU Gas Package to include *'renewable and low carbon gases'.*
International Oil and Gas Producers (IOGP)	In a March 2021 consultation response, IOGP called for the TEN-E regulations to continue to include fossil gas infrastructure projects, including *"natural gas and low carbon gases".*
Shell PLC	Shell *called* for an adaptation of rules in the Gas Package to allow for blending of fossil gas with other low carbon gases in the existing gas network, and a move towards the development of a dedicated hydrogen infrastructure in its June 2021 published consultation response on the policy.

Gas as Fulfilling Key Societal Needs, and as a Tool for Sustainable Development:

Analysis of IGU Strategy Documents

In Document E, in its "Messaging Architecture: Three Global Themes", IGU writes of the role for gas:

- "The gas industry supports and enables the global transition to an inclusive energy future"
- "Whilst every region's energy needs and concerns vary widely, every nation must balance four core energy needs - and the gas industry is uniquely positioned to meet each of them: - Maintain energy supply security and reliability - Reduce climate and environmental impact of energy supply and consumption - Provide access to energy to all citizens - Ensure affordability of energy prices"
- "Natural gas plays a positive and necessary role in meeting global needs for clean skies and significant carbon reduction" (Document E, extract 1)

While IGU appeared to focus on the 'green gas' narratives more so in the more developed markets - and the EU primarily - the messaging strategies detailed in Document E for Africa, South and South East Asia, and Latin America and the Caribbean, appear to focus more on promoting fossil gas and LNG for displacing coal and reducing energy and monetary poverty.

For example, all three of the messaging strategies for these regions included the following narratives:

- Fossil gas could displace coal, which would have "dramatic and immediate benefits in reducing GHGs and cleaning the environment" (Africa, South and Southeast Asia, Latin American and the Caribbean)
- New fossil gas infrastructure and increased gas usage can propel economies, "reducing monetary and energy poverty, and improving the lives of millions" (Africa, South and Southeast Asia, Latin American and the Caribbean)

Additionally, for Africa and South and Southeast Asia, the following narrative was included:

- Developing countries "should not be denied the benefits of such supply [fossil gas] that has benefited developed economies for many years" (Africa) and "Developed economies should not deny the region the benefits of such supply [fossil gas] that they benefited from for years", South and Southeast Asia)

Outside of these regions, the following narrative was proposed for North America and Middle East and North Africa,

- The region's LNG exports "bring secure energy and electricity to millions of global citizens in a way that will significantly reduce GHGs and deadly air pollution." (Europe contained a similar narrative reading "European investments in developing markets that will provide access to natural gas are investments in the future of the planet – bringing energy and security to millions of global citizens in a way that will significantly reduce GHGs and deadly air pollution".)

In its Triennial Work Program for 2018-2021 (Document C), IGU details three 'task forces'. The scope for 'Task Force 2 - Energy for All' reads as follows: "IGU Task Force Energy for All aims to promote the critical role gas plays in providing access to cleaner, sustainable energy and in facilitating economic development, while contributing to UN SDG7 Ensuring Access to Affordable, Reliable, Sustainable and Modern Energy for All and assisting meet COP21 targets" (Document C, extract 2). Involved in this phase were representatives from Shell, AGL Energy, Canadian Gas Association, World Bank Group, Engie, Gazprom, the IEA, and Sustainable Energy for All (Document F, extract 1).

IGU also writes under Phase 1:

- "Establish collaboration with NGOs that promote the use of gas to alleviate energy poverty, such as Sustainable Energy for All and others" (Document C, extract 2).
- And producing "IGU Energy Access Guidelines" that provide "Guidance on the technology, policy, regulation and financing conditions that support the role of gas in enabling access to sustainable energy" (Document C, extract 2).

An example of these types of narratives in use by IGU can be found in a paper IGU released in November 2021 called '*Vietnam the new Tiger* of Asia – Sustainable Development facilitated by gas'. In the paper, it describes fossil gas as key for energy access, as a catalyst for sustainable development, a partner to renewables, and able to decarbonize and clean air through being a substitute for coal.

IGU's Members' Lobbying

As with the 'greening gas(es)' narrative, InfluenceMap has seen the use of similar sustainable development-based narratives in policy influencing efforts from IGU's members, particularly in relation to South and Southeast Asia. In June 2022, InfluenceMap released a *briefing* examining the role played by Korean and Japanese businesses in influencing the energy development plans of Vietnam and pushing LNG. The below table includes some examples of this 'Sustainable Development' narrative being used to push fossil gas and LNG onto Vietnam.

Entity	Example
TOKYO GAS	In February 2022, the Tokyo Gas *corporate website* introduced its LNG projects in Asia including Vietnam, stating that 'The demand for energy in Asia continues to increase due to rapid economic development. Most of the energy sources in the region depend on heavy oil and coal, and the increase in CO2 emissions has become a social issue, so many countries are planning to import LNG'.
KOGAS KOREA GAS CORPORATION	KOGAS President Chae Hee-bong met with the Deputy Prime Minister and Minister of Planning and Investment in February 2020, to discuss energy infrastructure projects in Vietnam. In the meeting, he *stated* that he hoped Korean investment in LNG infrastructure could 'become a driving force leading the sustainable development of Vietnam' and help the 'growth of the local economy'.

Black Swan Events and the War in Ukraine

Analysis of IGU Strategy Documents

The documents suggest that IGU has developed specific pro-gas messaging strategies for every major region around the world including Russia, Black Sea & Caspian, and North America. In Document E, which states it was last updated on 04.05.2021, IGU's message to promote fossil gas to and from Russia included:

- "The region's large, reliable natural gas supply continues to help major global markets displace coal and act as potential partner to regional renewables.
- Without secure and constant supplies of Russian gas, Europe would be a greater user of coal now and in the foreseeable future" (Document E, extract 1).

In Document E, IGU also presented talking points for promoting fossil gas to and from North America. These focused on how fossil gas could reduce emissions when compared to coal and support renewables, as well as how LNG exports could help energy security:

- "The region's LNG exports must continue to grow, as they bring secure energy and electricity to millions of global citizens in a way that will significantly reduce GHGs and deadly air pollution" (Document E, extract 1)

Separately, in Document A, IGU listed under its expected developments between 2022-2025 a "[b]lack swan event upending [the] global political agenda" (Document A, extract 2). 'Black Swan' is a term popularized by Nassim Nicholas Taleb's 2007 book 'The Black Swan' and is described as an unforeseeable event which has catastrophic consequences and is explained in hindsight as if it were predictable. Taleb argues that given its unpredictability and severe consequences, people should assume a black swan event is a possibility and try to plan accordingly in advance. The term is typically used as an investment-related term, with previous examples including the COVID-19 pandemic. The relevance of this evidence is not to suggest IGU anticipated the 2022 Russian invasion of Ukraine, but that its tactics and strategies include being able to respond to such unexpected crises.

IGU Member Lobbying

Talking points reflecting IGU's regional messaging approaches appear in the lobbying efforts of gas company in those regions. At the time the regional messaging strategies were presented (May 2021), Gazprom was the *charter member* to IGU for Russia, as "the most representative gas entity in the country". On April 7th 2022, Russian Federation entities were *suspended* from engaging in any IGU activities. Prior to this in June 2021, Gazprom, *submitted comments* to the EU's revision of rules for market access to gas networks stating that fossil gas was needed to stabilize and balance the energy system and replace carbon-intensive fuels. Gazprom also stated it was important that the EU recognize the "objective role of natural gas in guaranteeing security of supply and the stability of the electricity grid."

Since the invasion of Ukraine, the EU's dependence on Russian oil and gas has been highlighted, with *40%* of the EU's fossil gas imports and 27% of oil imports coming from Russia. InfluenceMap's tracking of the gas industry policy engagement in Europe over this time has shown that narratives promoting Russian gas have significantly decreased. At the same time, however, InfluenceMap *noted* the near immediate use of narratives emphasizing the energy security benefits of LNG by the US oil and gas industry. It is likely that the pre-development of these messages allows the oil and gas industry to capitalize on unfolding crises very quickly, with consistent messaging points, at a critical time when policymakers are figuring out how to respond.

Communicating through the Media

Traditional Media

In Document E, under the heading 'Communications', IGU identified several 'key stakeholders' it looked to engage with from the media. These included the Financial Times, Xinhua, the Economist, Bloomberg, Reuters, Wall Street Journal, and the New York Times (Document E, extract 5). In Document G, IGU includes a slide titled "Constant institutional engagement and positive interactions" with images and logos taken from the Financial Times, the Australian Financial Review, The Economist, Bloomberg, and Reuters. Evidence of these engagements is evident from several articles from these outlets in which IGU is quoted, including an *article* in the Financial Times called 'Gas Shortages: what is driving Europe's energy crisis', and an *article* in Bloomberg called 'Coal-Reliant South Africa Is Turning To Gas Power'.

IGU is also active on social media. In Document J (Newsletter to IGU members, dated May 2021, extract 1), IGU informed members of its social media campaign to "Celebrate Role and Players in Natural Gas", examples of which can be seen below. IGU stated this campaign led to an increase of 20% in IGU followers on LinkedIn and Twitter.

IGU

"*The Economist* today made the strategic case for #gas as a catalyst for and foundation of a more sustainable global #energy system [...] (linked article titled 'The first big energy shock of the green era')"

Link to LinkedIn Post

IGU

"*The Financial Times* on #gas, its role in the global #energy system and the current pricing and supply situation [...] (linked article titled 'Gas shortages: what is driving Europe's energy crisis?')"

Link to LinkedIn Post

IGU

"Interesting piece from *Bloomberg* LP considering challenges to South Africa to both ensure secure, reliable #energy for its population and meet its commitments to #parisagreement. IGU Secretary General is quoted prominently. [...] (linked article titled 'Coal-Reliant South Africa is Turning to Gas Power')"

Link to LinkedIn Post

Social Media

Social media appears to be considered particularly important by IGU for the promotion of fossil gas. For its 2021 World Gas Conference (rescheduled for May 2022), IGU planned a session on how the industry can better leverage social media, as described in Document D. IGU stated one of the goals for the session was to "question whether the gas industry globally is leveraging this powerful medium". IGU further wrote:

> "The true power of social media is influence. Social media provides a platform for industry to influence stakeholders with the right content that helps them make a decision [...] In today's hyper-connected world, social media - when used strategically over time - is the most powerful form of advocacy, communications, marketing and market research the world has ever seen"
> **(Document D, extract 2).**

This focus on social media for advocacy purposes aligns with InfluenceMap's *previous research* on how the oil and gas industry uses Facebook advertising to promote the role of fossil fuels and fossil gas as a clean fuel in particular.

IGU

"The International Gas Union recognizes the important role the American Gas Association has played – since its inception – in 1918 – in leveraging and utilizing America's abundant, domestic, affordable and clean #naturalgas to meet the nation's energy and environmental needs #IGU90"

Link to LinkedIn Post

IGU

"The IGU recognizes the wealth, #energy and development brought to the state of Western Australia through #LNG developments led by Woodside, BP, BHP, Mitsui, Mitsubishi, Chevron, Shell and ExxonMobil #IGU90 #natgas"

Link to LinkedIn Post

Comparison with the science

IGU's promotion of fossil gas as a climate and sustainable development solution appears misaligned from the science of the Intergovernmental Panel on Climate Change. In the table below, InfluenceMap has juxtaposed IGU's statements about fossil gas to the IPCC's April 2022 report on the '*Mitigation of Climate Change*' on the main areas of misalignment with the highlighted text indicating key areas of discord. These main areas are the role of gas in the energy mix, the development of new fossil gas infrastructure, coal-to-gas switching as a climate solution, and the role of gas in addressing sustainable development goals.

Topic	IPCC Position	IGU Position
Gas in the global energy mix	In scenarios keeping warming below 1.5C with no or limited overshoot, the IPCC estimates the **fossil gas usage to fall 10% by 2030 and 45% by 2050 compared to 2019 levels. Without the use of CCS, fossil gas decreases further by 70% by 2050 compared to 2019 levels**. (AR6 WGIII Summary for Policymakers, C.3.2) Further, the IPCC projects that about **50% of gas reserves will remain "unburnable"** if warming is limited to 2C. (IPCC AR6 WGIII, Technical Summary, Box TS. 8)	"Natural gas-due to its availability, versatility for heating and power and chemical feedstock, price competitiveness, energy density, clean burning properties–and hydrogen–due to its low carbon content and many possible places and methods of production–**will both play important roles in global energization and decarbonization."** (Document B, extract 2)
Fossil gas Infrastructure	The IPCC states that estimate of future CO2 emissions from **existing fossil fuel infrastructures, including coal and fossil gas, already exceed the remaining carbon budget** in pathways limit warming to 1.5C with no or limited overshoot. As such, the IPCC argues that existing fossil fuel installations in the power sector need to be **decommissioned and used less, while new installations should be cancelled**. This appears to be particularly **pertinent for emerging economies** that have "comparably young fossil infrastructure with substantial remaining life." (IPCC AR6 WGIII, Chapter 6, 6.7.3.2) The IPCC also warns that the economic impacts of stranded assets could amount USD 1-4 trillion dollars (IPCC AR6 WGIII, Chapter 6, 6.4.2.7)	"Members have in the past, and will in future, play a key role in gas supply and market development, including by ■ **Developing new/additional natural gas production** from Russia, Qatar, USA, Canada, Iran, Mozambique, China, Egypt, Nigeria, Australia and other locations [...] ■ Developing gas infrastructure to ensure access to energy and economic development" (Document B, extract 3)

Coal-to-gas switching	The IPCC notes that between 2010 and 2019, **carbon intensity decreased in part due to coal-to-gas switching** (IPCC AR6 WGIII, Summary for Policymakers, B.2.4), however, it also states that the **use of fossil gas for electricity production is growing strongly, and gas has contributed to the largest increase in global fossil CO2 emissions in recent years**. It states that furthermore, gas brings the risk of increased methane emissions, as well as large cumulative emissions over the lifetime of new gas power plants that **may erase early carbon intensity reductions**. (IPCC AR6 WGIII, Chapter 2, 2.4.2.1) Accordingly, IPCC states that **purely fossil fuel to fossil fuel switching (coal-to-gas) is a limited and "potentially dangerous strategy unless it is used very carefully and in a limited way"**. (IPCC AR6 WGIII, Chapter 11, 11.3.5)	"The IGU respects the global energy resource mix, with diversity across regions and countries. […] **Coal should be replaced by natural gas**." (Document B, extract 2)
Energy access and energy poverty	IPCC suggests that **decentralized and on-grid renewables are likely the least-cost options to provide universal access to electricity by 2030**. (IPCC AR6 WGIII, Chapter 6, Box 6.1) Further, the IPCC states that there is high confidence that the eradication of extreme poverty, energy poverty and providing decent living standards in the context of sustainable development can be achieved without significant global emissions growth (IPCC ARG WGIII, Summary for Policymakers, B.3.3) and that **extending energy access to all in line with SDG7 is compatible with strong mitigation consistent with the Paris Agreement**. (IPCC AR6 WGIII, Chapter 3, 3.7.4.2) **There is no mention of fossil gas in this discussion**.	"**New natural gas infrastructure and increased gas usage can propel economies across sub-Saharan Africa, reducing monetary and energy poverty**, and improving the lives of millions in tangible, measurable ways" (Document E, extract 1)

IGU's Advocacy & Outreach Strategy

This section will look at the advocacy and outreach objectives and targets of IGU and its members. Advocacy appears to revolve around influencing policymakers and key organizations for policy development, for example development banks, the European Commission, and UN bodies. Outreach appears to focus on establishing relationships with influential organizations across environmental organizations, think tanks, consultancies, and energy industry organizations.

IGU's Advocacy Objectives: An analysis of IGU Strategy Documents

IGU's advocacy objectives can be found across two main documents. In Document A, IGU listed its advocacy objective as being to "Positively influence policymakers to encourage a significant role for gas in investment and legislative decisions" (Document A, extract 1). This is elaborated on in Document E, where IGU stated it will "support advocacy activities with government and supranational organisations, directly and indirectly" and will advocate for:

- ✓ "Available Finance
- ✓ Clean air by switching coal/oil to gas
- ✓ Natural [gas] as economic enabler
- ✓ Level playing field on subsidies/incentives for low/zero carbon gases and related technologies
- ✓ Pricing environmental externalities (pollution/emissions)"

IGU also stated it would advocate against:

- ✗ "Restricting finance for natural gas and network expansion
- ✗ Premature closure of, and bans on new, CCGT power stations
- ✗ Foreclosing gases in energy development plans" (Document E, extract 6).

These latter points appear to be particularly relevant for IGU's advocacy with development banks, with which it states it aims to "ensure the inclusion of gas(es) in energy development plans" and "avoid negative outcomes" including "restricting finance for gas network expansion" and "premature closing or bans on new CCGT power stations" (Document E, extract 7). IGU discloses the targets for its advocacy in a "Matrix of Key Stakeholders", found in Document E (extract 5). From this list, InfluenceMap has synthesized a list of three main target groups for advocacy:

Target Group	Named Targets
Global financial institutions and development-focused banks	World Bank, Asian Infrastructure Investment Bank, African Development Bank, Islamic Development Bank, Asian Development Bank
Large international bodies	International Energy Agency, International Renewable Energy Agency, COP, Sustainable Energy for All, UN Environment/UNECE, OECD
Regional Policymakers	European Commission, US Department of Energy, China National Energy Administration

In Document H (IGU's 2020 Annual report, dated as 24th June 2021), IGU states that these targets are

> "critically important, as they can be influential in the fuel choice that countries make"
> **(Document H, extract 1)**

This suggests a very deliberate targeting of influential entities for climate and energy policy.

In Document G, in the slide titled "Constant institutional engagement and positive interactions" (extract 1), IGU includes the logos of several influential organizations, including the International Renewable Energy Agency, International Energy Agency, United Nations, Asian Development Bank, the World Bank, International Monetary Fund, G20 Italian Presidency, and the European Bank for Reconstruction and Development. InfluenceMap did not find publicly available evidence of IGU advocating to the entities listed above as targets. However, in Document H (extract 1), IGU discloses some of its engagement efforts with a number of these key bodies, where it is likely IGU advocated for fossil gas using the advocacy points listed above:

Target	Engagement
G20	IGU states in Document H it has actively participated in the Energy Sustainability Working Group/ Energy Transition Working Group meetings since 2013. IGU also states it has given presentations on Energy Security and Resilience and the Role of Gas in the Circular Carbon Economy. IGU states it has "leveraged this opportunity" to stage 'Gas Days' at G20 event in 2016, 2018, and 2019. Due to the COVID-19 pandemic, no Gas Day was organized for 2020. It is unclear whether there was a Gas Day in the 2021 Summit held in Rome. In Document G (extract 1), IGU listed the G20 Rome team as an entity it had had "constant institutional engagement and positive interaction" with, and also outlined its proposed engagement strategy for the Indonesian G20 presidency in 2022, including a "special information briefing" in Jakarta (Document G, extract 2).
THE WORLD BANK	IGU states in Document H it has had a long-term relationship and MOU (memoranda of understanding) with the World Bank and has collaborated on several competence transfer seminars, primarily in Africa seeking flaring reductions. A new relationship with World Bank was being discussed when the document was written.
UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE	IGU states in Document H it has a MOU to collaborate through the UNECE's Committee on Sustainable Energy and its subsidiary Group of Exports on gas. IGU further states that this gives the group access to UNECE member states including Europe, USA, Canada, Russia, and Central Asia. IGU states it has participated in several UNECE meetings and given a number of presentations.

In a further document (Document G, dated 3rd November 2021, extract 3), IGU discloses its "Discrete Engagement" strategy for COP26, in which it states COP26 "is not the time or place for IGU to make a big public show" given COP's remit as a climate change event. Instead, IGU states its primary goal is "intelligence gathering to inform post COP engagement", and its secondary goal is to "be seen to be there by institutions we care about eg IEF/EDF/banks/members".

Leading up to COP26 there was much public discussion around the appropriate role and presence of fossil fuel entities. This document appears to confirm the event is used by fossil fuel groups to promote fossil fuel interests.

In November 2022, 636 fossil fuel lobbyists attended COP27, including *two representatives* from International Gas Union (the Secretary General and the Public Affairs Director). Despite *calls* for a "phase down" of fossil fuels and coal in particular, the final text did not include a phase down or phase out of any fossil fuels and mentions of renewable energy were changed to "low-emission and renewable energy".

UN environment United Nations Environment Programme	IGU states in Document H it has collaborated on the Climate and Clean Air Coalition through the UNE
iea	IGU states in Document H it participated in the International Energy Agency's "regulatory workshop, the annual meeting of the Methane Experts' Group in 2020."
SUSTAINABLE ENERGY FOR ALL	SEForAll is an international organization that works with a range of stakeholders, including the UN, policymakers, and private corporations, to achieve the sustainable development goals. IGU states in Document H it signed an agreement to explore areas of collaboration between itself and SEForAll in 2018.
IEF INTERNATIONAL ENERGY FORUM	IGU and IEF organize the Ministerial Gas Forum every two years to bring together industrial and political leaders to discuss the role of fossil gas in energy policies around the world, including in 2020 in Kuala Lumpar, Malaysia. This event brought together leaders including government ministers from Malaysia, Russia, India, Qatar, Nigeria, Bangladesh, Brunei Darussalam, Azerbaijan, Egypt, Bahrain, US, Canada, Colombia, Iraq, and Morocco. Also in attendance were CEOs and Leaders from the UN, Eni, Dana Gas, Boston Consulting Group, Cheniere Energy, TotalEnergies, Tellurian, Shell, and Gas Exporting Countries Forum (Document I, extract 1).

IGU & Member's Policy Advocacy

IGU

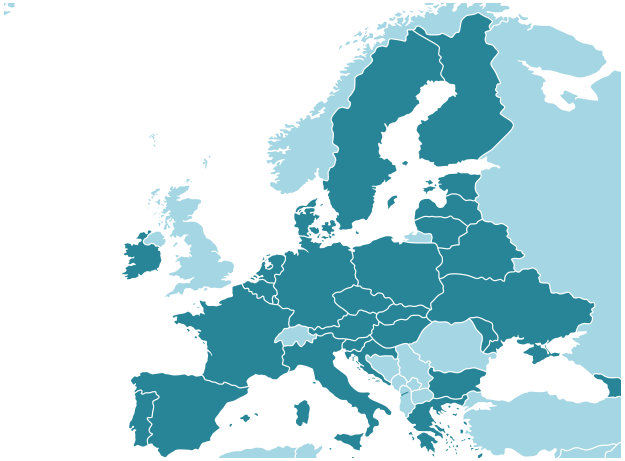
InfluenceMap conducted a *full assessment* of IGU via our LobbyMap platform and methodology, looking for engagement on climate-related policies. The assessment shows IGU has relatively low levels of direct policy engagement with policymakers. It appears IGU focuses on developing and coordinating global messaging strategies, and engaging multinational institutions. The lack of publicly available evidence on IGU's policy engagement may also indicate a lack of transparency from IGU on its activities to influence climate policy, particularly given its advocacy objectives outlined in Document E.

Where IGU has directly engaged in regional policy discussions, it often signs joint letters with other fossil gas industry associations and/or companies rather than advocate independently. This included a *joint-letter* to Frans Timmermans, Executive Vice President for the European Commission, and Kadri Simson, EU Commissioner for Energy regarding the EU Energy System Integration Strategy, which pushed for gas-based options in heating including "renewable and decarbonised gases". The letter was also signed by Eurogas, Hydrogen Europe, and Gas Infrastructure Europe amongst others.

InfluenceMap also found evidence of IGU lobbying on the EU's Sustainable Finance Taxonomy in 2020. IGU *co-signed* a letter along with 56 other oil and gas corporations or industry associations, including TotalEnergies, bp, and Equinor (all members of IGU), advocating for EU policymakers to weaken the taxonomy criteria, and include fossil gas. The letter advocated for "scaling up all decarbonisation options [...] including natural, renewable and decarbonized gases and CCUS technologies", as well as "deploying natural gas to continue displacing, wherever possible, coal in power generation and heating". The letter also stated, "Decades of investments had made gas and its infrastructure strategic assets for the EU's energy system security, stability and affordability." The EU's Sustainable Finance Taxonomy saw a high level of lobbying from the fossil gas industry, which was ultimately successful. In July 2022, the EU Commission *passed* its Complementary Delegated Act, which included fossil gas under certain conditions within the Sustainable Finance Taxonomy. This decision has significant implications for global climate policies worldwide as other countries look to develop similar taxonomies. For instance, the South Korean government *amended* its K-Taxonomy, the first of its kind in the ASEAN region, to include LNG as a 'green' transitional fuel following the EU's decision to include fossil gas, as requested by the gas industry.

IGU's Members' Advocacy

While evidence of IGU's own public policy advocacy was limited, its members are found to be highly active in directly lobbying climate policies in numerous regions. Additionally, IGU itself is a member of *GasNaturally*, a highly active group that describes itself as a partnership of eight industry associations representing the whole European gas value chain. InfluenceMap has tracked the successful lobbying of the gas industry across the EU, US, Korea, and Australia. The table below summarizes some of the key elements of that research and the IGU members involved in weakening critical climate policies globally (2020-22):



EU

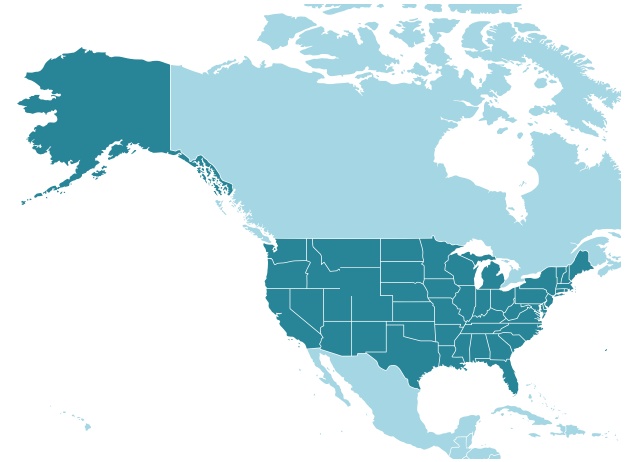
(please see February 2022 *report* 'The EU Green Deal vs The Fossil Gas Industry')

Impact of gas lobby on climate policies

Successes of the gas lobby in the EU include recognition of unabated fossil gas as "green" in the EU Sustainable Finance Taxonomy, and beneficial amendments via the European Parliament and Council to the revision of the Trans-European energy infrastructure (TEN-E) regulation. The gas industry has also secured early wins across the EU Green Deal's 'Fit for 55' Package, including support for fossil gas and hydrogen blending in the European Commission's Gas Package, preferential tax treatment for fossil gas in the Energy Taxation Directive, and avoiding a phase-out date being set for fossil fuels in heating within the Energy Efficiency Directive. Following the invasion of Ukraine, the gas industry has had several wins in building out new LNG terminals.

IGU Members involved in pro-gas lobbying

Eurogas, *Equinor*, *Repsol, Uniper*, *TotalEnergies*, *Shell PLC*, *Engie*, *Enagas*, *Naturgy*



US

(please see the May 2022 *report* 'The US Oil/Gas Industry and the War in Ukraine', and the September 2021 update to 'The Oil and Gas Industry's Digital Advertising Strategy' for evidence around Build Back Better lobbying)

Impact of gas lobby on climate policies

In the US, gas lobby wins include opposing the Build Back Better Act in 2022, lobbying in particular against the Clean Electricity Performance Program and Methane Fee. The Methane Fee has been reintroduced since under the Inflation Reduction Act but is limited in scope. The gas lobbying was also successful in reversing the Federal Energy Regulatory Commission's proposal to include climate change impacts in its interstate gas pipeline approval process, advocating against state-level gas bans in new buildings and introducing gas ban preemption bills in several states, and finally winning policy decisions to support LNG following the invasion of Ukraine.

IGU Members involved in pro-gas lobbying

America Gas Association, *ExxonMobil, Chevron*, *ConocoPhillips*, and *Sempra LNG*

Australia

(please see InfluenceMap September 2021 report '*Does Corporate Australia Support Climate Policy?*')

Impact of gas lobby on climate policies

The gas lobby was successful in securing several wins from the previous Morrison government (2018-2022). This largely centered around the 'gas-fired recovery', including supporting underwriting an expansion of the gas industry, creating new gas power plants, the development of a 'gas hub' for Australia. Other wins included weakening the mandates of the Australian Renewable Energy Agency and Clean Energy Finance Corporation to include CCS and fossil-hydrogen.

IGU Members involved in pro-gas lobbying

Australia Petroleum Production & Exploration Association and the *Australian Gas Industry Trust*, which includes *Energy Networks Australia*, *Gas Energy Australia*, and *Australian Pipelines and Gas Association*). There appears to be a particularly close relationship between AGIT and IGU, detailed on AGIT's website *here*. Other IGU members include *Origin Energy*, *Santos*, and *Woodside*.

Korea

(please see InfluenceMap's December 2021 *policy alert* on the Korean Sustainable Finance Taxonomy)

Impact of gas lobby on climate policies

In December 2020, the Korean Sustainable Finance Taxonomy (K-taxonomy was expanded to include LNG as a 'green investment', following initial drafts that had excluded it. The gas lobby also successfully secured higher emissions allowances for the gas industry in the Third Allocation Phase (2021-2025) of the Korea Emissions Trading Scheme (K-ETS), with the Ministry of Environment raising the emissions allocation rate for the fossil gas industry from 0.74 to 0.84.

IGU Members involved in pro-gas lobbying

KOGAS

IGU's Outreach Objectives

An analysis of IGU Strategy Documents

This section outlines IGU's outreach activities, which include developing partnerships with media, industry associations, environmental organizations, think tanks, and consultancies. In Document A, IGU lists its objective for outreach as to "Raise IGU's credibility and leadership amongst influential organizations to help shape energy dialogues and debates" (Document A, extract 1).

In Document E (extract 5), IGU identifies several key organizations it wants to engage covering energy industry associations, environmental organizations, think tanks and consultancies, and affiliations. A number of these are highlighted in green, which indicates "Priority engagement". IGU does not provide any further explanation as to how it has designated organizations as 'priorities' or not. These are listed on the following page.

It is unclear if IGU has engaged with all these targeted entities or to what extent. In Document G (extract 1), IGU states it has had constant institutional engagement and positive interactions with the International Energy Forum, Columbia Centre on Global Energy Policy, Hydrogen Council, GasNaturally, Gas Exporting Countries Forum, and J.P. Morgan. Additionally, in Document K (IGU Executive Committee Meeting, EXC' Virtual Session, June 23rd 2021, extract 3), IGU states it has had engagement with Oxford Institute for Energy Studies, Boston Consulting Group, and Platts IHS Markit.

Several representatives from these organizations, and those listed as advocacy targets, spoke at IGU's World Gas Conference in May 2022 according to the *World Gas Conference website*. These include:

- Professor Jonathan Stern, Distinguished Research Fellow & Founder of the Natural Gas Research Programme, **Oxford Institute for Energy Studies**
- Ban Ki-Moon, 8th Secretary General, **United Nations**
- Scott Foster, Director, Sustainable Energy, **United Nations Economic Commission for Europe**
- Demetrios Papthanasiuo, Global Director, **The World Bank**
- Michael Stoppard, Global Gas Strategy Lead & Special Advisor, **S&P Global (formerly IHS Markit)**

These speakers were joined by speakers from several oil and gas company executives, including from Shell, bp, ExxonMobil, KOGAS, JERA, and TotalEnergies amongst others. IGU Secretary General, Milton Catelin, reconfirmed IGU's strategic priorities, ***stressing*** the need to counter criticism against fossil gas, and increase engagement with key international organization to secure the future of gas, including in the Global South.

IGU's Outreach Targets

IGU's 'Priority Engagement' targets highlighted in green as per Document E, extract 5

OUTREACH			
Energy Industry Organisations	Environmental Organisations	Think Tanks and Consultancies	Affiliations
World Energy Council	Environmental Defense Fund	Oxford Institute for Energy Studies	Gas Technology Institute
Gas Exporting Countries Forum	Rocky Mountain Institute	Columbia University Center on Global Energy Policy	European Gas Research Group
Hydrogen Council		Bloomberg New Energy	Gas Infrastructure Europe
International Group of LNG Importers (GIIGNL)		Platts IHS Markit	Natural Gas Vehicle Europe
Methane Guiding Principles Group / OGCI		McKinsey	NGV Global
Global CCS Institute		Woodmac	IPLOCA
International Energy Forum		Boston Consulting Group	Marcogaz
World Petroleum Council		Brookings Institution	Energy Delta Institute
OPEC		Global investment banks	Pipeline Research Council International
IPIECA			ARPEL
International Organization of Oil and Gas Producers			Russian Natural Gas Vehicle Association
World LPG Association			International Institute of Refrigeration
Gas Naturally			
Eurogas			

IGU's Collaboration with Environmental Organizations and Methane

On its collaboration with environmental organizations, IGU states in Document E, its outreach approach is to "Find common ground and demonstrate seriousness of purpose on issues such as methane mitigation" (Document E, extract 8). It is also contained in IGU's 2021 Resolution (Document B, extract 2). It states, "Members will work to measure, reduce and verify their own GHG (CO2 and methane) emissions by (where applicable) reduction of flaring and methane emissions [...]".

Based on IGU's documents, commitments to methane reductions appear to be considered important for the public image of fossil gas and the gas industry. In Document G (extract 4), IGU lists "Methane: blog to demonstrate the significant progress made by the gas value chain and ongoing process" under its review of its public affairs activities. Document E (extract 1) also lists several region-specific talking points referencing methane, including for Russia, Europe, and North America (methane is not mentioned in any of the talking points for regions in the Global South).

At the same time, while companies within the fossil gas value chain may be taking action to reduce emissions on a voluntary basis, InfluenceMap's analysis shows many companies - and their industry associations - continue to oppose or try to weaken binding methane emissions policies globally. For instance, in the US in early 2022, the Environmental Protection Agency released the comments received for its proposed methane standards. *Chevron* and the *American Gas Association* opposed key components of the regulation, while *Shell* and *ExxonMobil* offered mixed support (ExxonMobil supported some measures of the proposed standards while opposing others, and Shell offered broad support for the standards without engaging on any of the more detail points, while proposing a methane intensity standard). Meanwhile in Europe, in April 2022, in feedback to the European Commission's Methane Regulation for the energy sector, *Eurogas*, *GasNaturally*, and *IOGP*, and companies *bp*, *Eni*, and *Repsol* all advocated to weaken key elements of the regulation. This includes a large loophole in the regulations that prevents the methane standards being applied to imported fossil gas, which accounts for 90% of the gas used in the EU.

In Document A (extract 1), IGU stated its objective in outreach was to "raise IGU's credibility and leadership amongst influential organizations to help shape energy dialogues and debates". InfluenceMap's analysis suggests that this raised credibility aids the gas sector's advocacy in favor of voluntary methane reduction initiatives and opposition to more stringent, regulatory measures. Furthermore, that it helps builds credibility for the claim that fossil gas can be low-carbon or decarbonized, which is key to the gas sector's push for the continued role for fossil gas, globally.

Conclusion

The documents analyzed as part of this research provide an extremely valuable perspective on the communications, outreach, and advocacy strategies developed and implemented by the International Gas Union, a large industry association representing the global gas sector. InfluenceMap's analysis of these strategies can be summarized as follows:

Communications Strategy: Promote fossil gas using regionally specific narrative strategies based on the 'environmental-consciousness' of the market. In the EU this includes broadening the definition of fossil gas to create a new understanding that places fossil gas in a wider category of 'green gas(es)', as opposed to the category of fossil fuels. Meanwhile, in developing countries, it is suggested that fossil gas is positioned as an answer to sustainable development goals, particularly in addressing energy poverty and air pollution. These messaging strategies are designed to "promote positive sentiment" and "increase social acceptance" for fossil gas, in defense against the "potentially existential" threat posed by discussions around climate change for the fossil gas value chain. Critically, however, the promotion of unabated fossil gas is misaligned from the science of the IPCC and IEA. Additionally, IGU's predeveloped messaging strategy and anticipation of geopolitical events, allows advocacy for gas from one region to be easily replaced by advocacy for gas from another region.

Advocacy Strategy: IGU's advocacy strategy appears to focus on influencing key global institutions, including the International Energy Agency, the UN, G20, and development banks, including via participation in working groups and committees. These institutions wield significant influence over global energy policy.

Outreach Strategy: IGU's outreach strategy focuses on building relationships across the media, environmental organizations, think tanks and consultancies, and energy industry associations. IGU's outreach to these organization is to raise its credibility and leadership in helping shape energy dialogues.

InfluenceMap analysis of the climate-related policy engagement activities of the oil and gas sector demonstrates the use of similar narratives and tactics to those developed by IGU.

InfluenceMap

Appendix

Document A, extract 1

Document A, extract 2

Document B, extract 1

Document B, extract 2

Document B, extract 3

Document C, extract 1

Document C, extract 2

Document D, extract 1

Document D, extract 2

Document E, extract 1

Document E, extract 2

Document E, extract 3

Document E, extract 4

Document E, extract 5

Document E, extract 6

Document E, extract 7

Document E, extract 8

Document F, extract 1

Document F, extract 2

Document G, extract 1

Document G, extract 2

Document G, extract 3

Document G, extract 4

Document H, extract 1

Document I, extract 1

Document J, extract 1

Document K, extract 1

Document K, extract 2

Document K, extract 3

Public Affairs Objectives

- **Communications:** Promote positive sentiment toward, and broader definition of, gas amongst key media and influencers
- Increase social acceptance of natural gas as distinct from other fossil fuels and of gas in all its forms as a key part of a transition to a clean and inclusive energy future.
- **Advocacy:** Positively influence policymakers to encourage a significant role for gas in investment and legislative decisions.
- **Outreach:** Raise IGU's credibility and leadership amongst influential organisations to help shape energy dialogues and debates.
- **Internal:** Ensure understanding and alignment of new position and approach to public affairs
- **Measure**: Progress on above dimensions

The Path from Daegu to Beijing:

Expected Developments and IGU Priorities 2022-2025

Expected Developments

- Escalating rhetoric towards NCZ
- Growth of wind and solar
- Increased natural gas and hydrogen consumption
- Stress in global energy systems
  - Four energy needs imbalanced and increasingly in conflict
  - Black swan event upending global political agenda

IGU Priorities

- Increasingly effective advocacy towards significant role for gas in investment decisions
- Continued understanding of broad definition of gas
- Constant increase in social acceptance of natural gas
- Widespread recognition of IGU as global voice of gas

Now, in 2021 – five years since the declaration of the Paris Agreement – there is an active global debate about

- Role and impacts of energy
- Climate change, Paris Agreement, Nationally Determined Contributions, Greenhouse Gas Emissions, Net Zero Emissions, Decarbonization, and the Energy Transition
- Own Greenhouse Gas emissions of countries, cities and companies
- Challenges during, and pathways for, the Energy Transition

This debate could be potentially existential for the global natural gas value chain. Potential regulatory changes combined with a restriction of liquidity to the sector could have highly damaging effects to the industry. It is in the IGU's not interest to ignore the issue, but to find a positive message to defend and enhance the role of gas in the global energy dynamic.

To this end it is necessary for the IGU Executive Committee to set out its position on **Climate Change and the Future Role of Gas** to

- Clarify for Members the Position of the organization to which they belong
- Serve as the basis for recruitment of new Membership, and retention of existing Members
- Form the basis of the IGU public profile
- Drive the communication, outreach and advocacy that is designed to protect and enhance the role of gas both today and for decades to come.

The Four Roles of Energy

Globally, regionally and within nations, societies and economies have four simultaneous needs from energy

- For energy supply security and reliability
- For reduced environmental and climate impact of energy
- For being affordable
- For providing access to energy to those without energy

Accordingly, it is proposed that the IGU Position is that

- Energy and gas supply are vital to human society; energy supply needs to be available and secure and reliable, with reduced environmental and climate impact, whilst remaining affordable.

The IGU Vision and Mission

The IGU Mission and Vision as adopted in Yogyakarta, Indonesia, 2019 defines the IGU's Vision and Mission to be:

Vision

As the global voice of gas, the IGU seeks to improve the quality of life by advancing gas as key contributor to a sustainable energy future.

Executive Summary

The Executive Committee is asked **to APPROVE** the Resolution below:

IGU Executive Committee Resolution - 18 May 2021

The Executive Committee resolves that the IGU.

1. supports the "IGU Position on Climate Change and the Future Role of Gas"

   Two points of equal importance

- Energy and gas supply are vital to human society; energy supply needs to be available and secure and reliable, with reduced environmental and climate impact, whilst remaining affordable.
- Climate change presents significant risks to the planet, to humans and to other species of life.

   Gas is and will be a major solution to both points

- The IGU supports the Paris Agreement, Nationally Determined Contributions to reduce GHG emissions, and is committed to the significant decarbonization of the global energy system.
- Natural gas - due to its availability, versatility for heating and power and chemical feedstock, price competitiveness, energy density, clean burning properties – and hydrogen – due to its low carbon content and many possible places and methods of production – will both play important roles in global energization and decarbonization.
- 2030 and 2050 global energy needs will require growth for renewables and for gas of all types. It is not possible - neither in 2030 nor in 2050 - to supply world energy needs from mainly or only intermittent solar and wind resources, even if supported by electricity storage systems including batteries.
- The IGU respects the global energy resource mix, with diversity across regions and countries. Regions and countries have different needs from gas; the gas industry aims to meet those needs, and Members will continue market development for gas to ensure customer needs are met and supply not constrained. Coal should be replaced by natural gas.
- Production and consumption of natural gas energises societies and economies, also contributing to climate change through release of CO2 and methane. Members will work to measure, reduce and verify their own GHG (CO2 and methane) emissions by (where applicable) reduction of flaring and methane emissions, carbon capture including nature-based solutions, and including increasing volumes of low/zero carbon gas in their infrastructure and businesses.
- Members will support energy customers with innovation of the relevant technologies during the energy transition to remain competitive whilst reducing their climate footprint.

2. confirms that "Gas" as cited in IGU Vision and Mission includes natural gas, renewable gases (including hydrogen), decarbonized gases and low carbon gases, and instructs the Secretariat to make the necessary adjustments in public profile of the IGU in accordance with this broad definition of gas, and to base the IGU's future Communication, Outreach and Advocacy on this Position.

Accordingly, it is proposed that the IGU Position is that

- Climate change presents significant risks to the planet, to humans and to other species of life.
- The IGU supports the Paris Agreement, Nationally Determined Contributions to reduce GHG emissions, and is committed to the significant decarbonization of the global energy system.
- 2030 and 2050 global energy needs will require growth for renewables and for gas of all types. It is not possible - neither in 2030 nor in 2050 - to supply world energy needs from mainly or only intermittent solar and wind resources, even if supported by electricity storage systems including batteries.

Customers of the Energy and Gas Industry

IGU Members have for decades worked hard to meet the energy needs of customers on all six continents. The combination of technological innovation, investor and financial and regulatory pressures to give effect to the energy transition is exerting consider pressure on customer of the energy and gas industry. Customers

- Are experiencing a fast-changing world of distributed electricity generation, being prosumers, demand management, changing electricity markets, the internet of things, digitization, volatile energy prices, changes in regulations
- Will switch from coal to gas
- Will switch to higher efficiency technologies including ones that are energized by power and many-colours-of hydrogen, driven by either economics or containment of their scope 1/2 emissions
- Will increase attention to environmentally friendly investment decisions, also considering greater focus on financing trends with respect to ESG metrics

Accordingly, it is proposed that

- Members will support energy customers with innovation of the relevant technologies during the energy transition to remain competitive whilst reducing their climate footprint.

Gas Market Development

Members have in the past, and will in future, play a key role in gas supply and market development, including by

- Developing new/additional natural gas production from Russia, Qatar, USA, Canada, Iran, Mozambique, China, Egypt, Nigeria, Australia and other locations
- Developing new national and international natural gas transmission lines and LNG export and import facilities
- Supporting greater market and trade transparency and improving security of gas supply
- Supporting growth and development of renewable gas businesses
- Developing gas infrastructure to ensure access to energy and economic development

Accordingly, it is proposed that the IGU Position is that:

- The IGU respects the global energy resource mix, with diversity across regions and countries. Regions and countries have different needs from gas; the gas industry aims to meet those needs, and Members will continue market development for gas to ensure customer needs are met and supply not constrained. Coal should be replaced by natural gas.

Future Natural Gas and Hydrogen Consumption

Members of the IGU are often asked how they see the future of gas demand, with a focus specifically on natural gas and hydrogen consumption, given that currently customers use 4 TCM of natural gas and ~75 mt of grey hydrogen per year, with the production of green hydrogen still being negligible.

It is clear that major factors increasing future natural gas consumption include

- population and economic growth
- access to energy in South Asia and Africa
- switching from coal (and oil) to gas
- phase-out of aging nuclear power reactors
- production of grey, turquoise and blue hydrogen
- need for high temperature heat in industry
- absence of electricity storage at scale
- absence of green hydrogen at affordable prices

At the same time major factors decreasing future natural gas consumption include

- rise of renewable wind and solar power generation
- new nuclear facilities and hydroelectric facilities built
- government policies to constrain natural gas consumption
- efforts to constrain lending and finance for natural gas infrastructure
- customers constraining their scope 1 & 2 emissions
- likely future growth of green hydrogen

Currently factors increasing natural gas consumption outweigh factors decreasing demand. The supply and market for hydrogen and other low carbon gases is expected to also grow in decades to come.

Own Greenhouse Gas Emissions

Members of the IGU already recognise the need for reducing their own Greenhouse Gas Emission by (where applicable)

- Improving measurement, documentation and reduction of methane emissions, with transparency and whilst setting standards for performance
- Global gas flaring reduction efforts
- Procuring, transporting and marketing/selling volumes of hydrogen and renewable gas in/from their networks
- Making natural gas infrastructure hydrogen ready
- Measuring their scope 1/2/3 CO2 emissions
- Working to install Carbon Capture Utilization and Storage facilities to decarbonize natural gas
- Using nature-based solution to offset CO2 emissions, so decarbonizing natural gas

Strategy Committee

[redacted]

Chair

[redacted]

Germany

Vice Chair

[redacted]

Russian Federation

Introduction

The IGU committee on strategy will partially continue the work of the previous triennia, namely the IGU pricing survey, the long-term perspectives of natural gas and the way the gas industry is reacting to different regulation regimes.

Study Group 1:
Efficiency of gas

This committee shall lead a study on the efficiency of natural gas. The Study Group will examine the overall efficiency of the entire gas chain from production, transport, energy balance and application. It will compare overall system efficiency under different criteria and demonstrate the cases where gas systems can serve policy needs in a better way compared to other forms of energy or other infrastructures being utilized. Cases in focus shall be: Comparision of the most cost-efficient strategies for the reduction of emissions from transport; assesment of the most cost-efficient way to lower emissions in big cities; comparison of transition strategies towards a quick development of areas with lack of energy (supporting the work of other IGU committees); comparison of fastest and most efficient transition strategies towards future decentralized and more efficient overall energy systems. The work of Study Group 1 is also open for the aspects of organizational efficiency and cost efficiency of the gas industry.

Study Group 2:
Pricing of gas

The IGU pricing survey is recognized as one of the most important IGU reports. SG2 will continue to produce and improve this report.

Study Group 3:
Long term strategy in environment-conscious markets

The long term strategy for natural gas is quite an issue for the strategy committee: the entire energy industry is in a phase of change, and so are the perspectives of natural gas. The absolute optimism prevailing at mid-decade and being hailed as the golden age of natural gas has been replaced with a more delicate view of the role of natural gas in the future energy mix. In particular in mature markets with a growing consciousness for environmental matters clients developed a fossil phobic attitude which also includes natural gas. This role of gas needs to be examined, and strategic solutions to return to an overal postive image of gas shall be developed. Thus, "gas" needs to be redefined, not only to cover natural gas, but including other, alternative gases, without fossil background. Some first results of these efforts show up by defining natural gas as the catalyst to numerous sources of renewable energy sources. The "greening of gas" not only asks for the inclusion of biogases into the portfolio, but addresses also issues as sector coupling, storage and fuel replacement for power production and transport.
Therefore, natural gas, as the least climate damaging of all fossil energies, has a new role to bring humanity to a sustainable, climate friendly future.

Sustainability Committee

[redacted]

Chair

[redacted]

Malaysia

Vice Chair

[redacted]

Spain

Introduction

The Sustainability Committee will continue the work conducted under the TJSA Triennium to support IGU's efforts in demonstrating the role of gas in the world's future sustainable energy mix, including as a partner of renewable energies, and enhancing public acceptance of unconventional gas supplies. Public acceptance of gas development and delivery through HSSE(Health, Safety, Security and Environment) will be a focus of the Committee. The committee will discuss social and environmental challenges to identify opportunities and innovations in supporting a sustainable future powered by gas. In addition, a study on gas and renewable energies will be carried out.

Study Group 1:
Public Acceptance of Gas Development and Delivery through HSSE

Role of HSSE in gaining public acceptance of gas development and delivery:

- Documenting good practices of HSSE in gaining public acceptance of gas development and delivery
- Identifying innovative practices of HSSE to strengthen public acceptance of gas development and delivery

Study Group 2:
Innovative practices in Environmental Management

Identify practices and success stories by consolidating innovative solutions to overcome environmental challenges for:

- Reducing emissions - Meeting the challenges of emissions management
- Water management - Potential use of produced water (irrigation, recycle, recover)
- Soil and Groundwater Management - Well integrity: Protecting aquifer and groundwater
- Decommissioning – Rehabilitation

Study Group 3:
Gas and Renewables

Focus on delivering one study report and one external publication on gas and renewable energies

- Potential of renewable gases as a long term option
- Exploring the complimentary roles of gas and renewable energies
- Technological disruptions in gas and renewable energies: impact to energy growth

Task Force 1- Strategic Communications and Outreach

[redacted] Chair [redacted] United Kingdom

Vice Chair [redacted] Australia

Vice Chair [redacted] Spain

Introduction / Scope

Policy direction, stakeholder perceptions and public confidence are critical factors influencing the outlook for the natural gas industry. The Strategic Communications and Outreach Taskforce will support IGU strategic communications strategy and delivery, aiming to clearly articulate the critical role of gas in a sustainable energy future and position the IGU as the global voice of the gas industry.

Taskforce 1 will provide input to the design and delivery of the Strategic Framework, Delivery Model and Annual Plan for IGU Strategic Communications and Outreach and core materials, managed by the Public Affairs Director. Two full meetings of the Taskforce will be held each year of the triennium, including one meeting to review the annual plan before it is presented to the IGU Executive Committee. A subset 'working group' of Taskforce 1 will work closely with the Executive Director Public Affairs and provide strategic input and support for the delivery of the Plan.

The Taskforce will seek to maximize the input and involvement of the IGU Taskforces, Committees, Regional Coordinators, National Associations and others, to leverage their experience and expertise.

Task Force 2- Energy for All

[redacted] Chair [redacted] Australia

Vice Chair [redacted] Republic of Korea

Introduction / Scope

Access to a sustainable energy supply is essential to alleviate poverty and enable prosperous communities. However 1.1 billion people in developing countries are unable to access power and larger numbers have access to intermittent power only or use polluting and unhealthy fuels with associated security and gender issues. As the world's population increases so does the need for more energy and, correspondingly, larger quantities of cleaner energy are needed to meet rising demand and enable economic development, whist addressing environmental and health issues.

IGU Task Force Energy for All aims to promote the critical role gas plays in providing access to cleaner, sustainable energy and in facilitating economic development, while contributing to UN SDG7 Ensuring Access to Affordable, Reliable, Sustainable and Modern Energy for All and assisting meet COP21 targets. This will be achieved by establishing an IGU Gas Energy Access Platform that nations with limited energy access can utilise to promote and facilitate the development of gas infrastructure. The following work will underpin the Platform:

Phase 1

Collation of case studies (evidence-based and verified by credible institutes) that:

- Demonstrate the role that gas plays in supporting energy access;
- Compare the attributes of gas to alternatives energies, such as solar, wind and LPG;
- Show how energy access facilitates industrialisation and economic development

Establish collaboration with NGOs that promote the use of gas to alleviate energy poverty, such as Sustainable Energy for All and others.

Phase 2

Production of IGU Energy Access Guidelines that provide, on a regional basis:

- Current and potential examples of where gas can provide access to sustainable energy;
- Guidance on the technology, policy, regulation and financing conditions that support the role of gas in enabling access to sustainable energy

Members will come from major IOCs and global/regional gas associations and organisations (such as GIIGNL and WGPGA) and research bodies. The Task Force will meet twice each year during the IGU triennium, with the option for extra Working Group meetings as required.

Developments in Strategy in 2020

- At the begin of 2020, the objective was to „green“ natural gas by admitting gases from renewable energies;
- Since then, the criticism on natural gas has been ever increasing, mainly on the issue of being fossil and being a major source for GHG emissions (CH_4 being deemed as 100 times worse than CO_2)
- Strategy of the „activists“ organizations: we finished coal, shot the reputation of oil, now lets finish gas by giving them the blame for climate collapse
- Option for the gas industry: safe the assets and the (changed) market by conveying renewable gases (hydrogen, biomethane) with some natural gas as back-up by
  - Allowing admixtures (in many cases and applications, up to 20 % hydrogen are feasible with the existing appliance population
  - Convert some natural gas grids and transport lines to „pure“ hydrogen (problem: price control, Capex)
  - Start developing naval transport of hydrogen, using the experiences from LNG

Insights Session: Using Social Media to Engage Stakeholders

Goal of the session
To give an overview of the power of social media, question whether the gas industry globally is leveraging this powerful medium, consider examples of where it is being used effectively and hear from social media experts with advice on how to strategise efficiently.

What I can learn during the session
- How to connect a common message on a global scale.
- How to target the right stakeholders with the right message via social media.
- How to navigate the social media landscape.
- What platforms work best, when and how.
- What are case studies of successful social media programmes.
- How to disseminate real-time news and promote information discovery.

Main message of the session
The true power of social media is influence. Social media provides a platform for industry to influence stakeholders with the right content that helps them make a decision. Many companies are not leveraging the power of social media to the best of their capabilities. In today's hyper-connected world, social media - when used strategically over time — is the most powerful form of advocacy, communications, marketing and market research the world has ever seen.

Document D, extract 1

Messaging Architecture: Three Global Themes

- The gas industry supports and enables the global transition to an inclusive energy future
  - An inclusive energy future is one that delivers clean, secure and affordable energy, using electrons and natural gas and hydrogen molecules, and the necessary infrastructure to help individual countries meet UN Sustainable Development and Paris Goals.
- Whilst every region's energy needs and concerns vary widely, every nation must balance four core energy needs - and the gas industry is uniquely positioned to meet each of them:
  - Maintain energy supply security and reliability
  - Reduce climate and environmental impact of energy supply and consumption
  - Provide access to energy to all citizens
  - Ensure affordability of energy prices
- Natural gas plays a positive and necessary role in meeting global needs for clean skies and significant carbon reduction - and we challenge short-sighted, binary approaches toward energy that end up hurting millions of people with significant unintended consequences.

Document E, extract 1

IGU Messages to and about Africa

Sub-Saharan Africa

GDP/Capita: US$1,596 Elec Access: 48%
CO_2/Capita: 0.8 MT Coal Reliance: 25%

- Africa's population will grow from 1.3b to 2b by 2040; population in 14 megacities require energy for development
- Deforestation in Africa due to lack of access to electricity and modern cooking fuel is Africa's largest contribution to climate change
- Africa receives highest solar radiation of all continents, with good wind on its northern and southern coasts

- An increase in natural gas in African economies – displacing coal and wood – would have dramatic and immediate benefits in reducing GHGs and cleaning the environment.
- Africa cannot be energised by renewable electricity only.
- Africa has a remarkable new domestic natural gas supply opportunity – Africa should not be denied the benefits of such supply that has benefited developed economies for many years.
- New natural gas infrastructure and increased gas usage can propel economies across sub-Saharan Africa, reducing monetary and energy poverty, and improving the lives of millions in tangible, measurable ways:
  - The success of Africa's first LNG import project at Tema in Ghana can and must be repeated in other coastal African countries
  - LNG and pipeline gas exports from Egypt, Algeria, Nigeria, Equatorial Guinea, Angola, Mozambique bring value foreign exchange to these economies and must continue
  - Gas exports from Mozambique, Senegal/Mauritania and Tanzania can and must be started, as they will bring valuable development to these economies

Document E, extract 1

IGU Messages to and about the Middle East and North Africa

Middle East & North Africa

GDP/Capita: US$7,991 Elec Access: 92%
CO_2/Capita: 6.0 MT Coal Reliance:1%

- Within the last decade, regional gas demand has grown by 100 bcm, placing MENA countries among the largest gas consumers per capita globally.
- The region has substantial undeveloped gas resources
- Iran has world's 2nd largest gas reserves and has significant capacity to export. Iranian exports could fundamentally change the global gas market due to geographical position – potential to supply by pipeline & LNG.

- Natural gas has been instrumental in meeting growing power demand in MENA countries and establishing industrial bases that have contributed to their economic growth.
- The region's abundant LNG exports bring secure energy and electricity to millions of global citizens in a way that will significantly reduce GHGs and deadly air pollution.
- The region is well positioned to lead the way in developing blue and green hydrogen and ammonia for local use and exports to Europe and Asia.
- MENA gas reserves are significant, somewhat untapped and could be a major catalyst in making the visions of socio-economic development and liberalisation a reality. New jobs across the socio economic scale create valuable opportunities and will help maintain socio-political stability.

Document E, extract 1

IGU Messages to and about Latin America and the Caribbean

Latin America and Caribbean

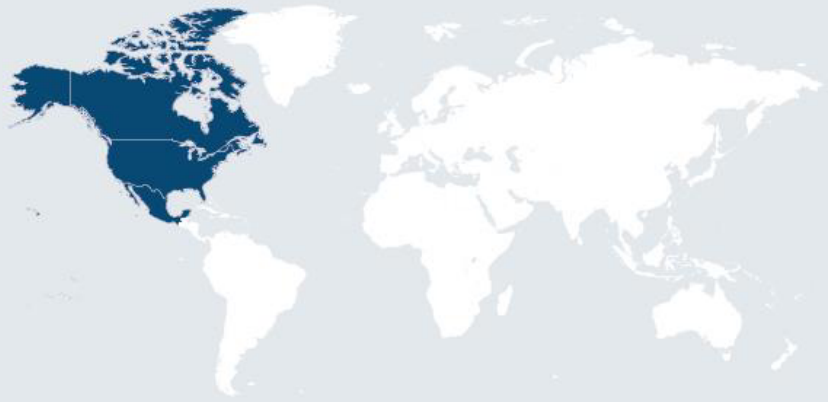
GDP/Capita US$8,869 Elec Access: 98%
CO_2/Capita: 2.923 MT Coal Reliance: 5%

- Region is rich in resources and undergoing positive macro developments, with strong demand outlook for energy consumption and economic growth
- South America's regional gas pipeline interconnection - amongst Argentina, Chile, Bolivia and Brazil - helps energise the continent

- An increase in natural gas in Latin American economies, displacing coal, would have dramatic and immediate benefits in reducing GHGs and cleaning the environment.
- Imported LNG and pipeline gas successfully play complementary roles in allowing renewables to grow, and natural gas and hydrogen will play an essential part in balancing the intermittency of hydro, solar and wind.
- Gas continues to bring citizens in the region access to energy at rates far greater than other sources of energy
  - Even in middle income Colombia, for example, gas connected five times as many citizens as did electricity in 2020
- New gas infrastructure and increased gas usage can propel economies across the region, reducing monetary and energy poverty, and improving the lives of millions in tangible, measurable ways:
  - LNG exports from Peru and Trinidad and Tobago boost local economies and help meet world energy needs
  - Chile's hydrogen plans which utilise the solar and wind resources of the Atacama and coastal regions, demonstrate the region's potential for game-changing innovation

Document E, extract 1

IGU Messages to and about North America



North America

GDP/Capita: $63,343 Elec Access: 100%
CO_2/Capita: 15.46 MT Coal Reliance: 13%

- Rapid expansion of natural gas production sees prices fall and US and Canada becoming exporter of LNG
- Electricity prices continue to climb; gas remains more affordable
- Continued activism against natural gas development and use
- State and municipal governments restricting natural gas development and use
- Mexico challenged by relatively expensive and unreliable electricity supply

- Increased use of natural gas continues to propel North American economies while significantly reducing their GHG emissions.
- Methane emissions reductions programmes, increased efficiency measures and new technological breakthroughs will continue to allow the gas industry to play a vital role delivering a cleaner environment to the region.
- Gas-fired power generation successfully plays a complementary role to allow renewables to grow, and natural gas and hydrogen will play an essential part in balancing the intermittency of renewables.
- North America's abundant supply of natural gas essential to maintaining the region's energy supply security and reliability.
- Government policies restricting development of new natural gas resources and infrastructure risk slowing the energy transition.
- The region's LNG exports must continue to grow, as they bring secure energy and electricity to millions of global citizens in a way that will significantly reduce GHGs and deadly air pollution.

Document E, extract 1

IGU Messages to and about Europe

Europe

GDP/Capita: US$47,827(EU)
CO_2/Capita: 6.5 MT (EU)
Elec Access: 100%
Coal Reliance: 16%

- Russia, Qatar, Norway and Algeria will continue to supply Europe reliably with pipeline natural gas, with LNG's role to increase.
- Strong focus on reducing internal methane emissions reduction, and also methane emissions associated with imported pipeline gas and LNG.
- Essential that Europe demonstrate success with CCUS, enabled by its Emissions Trading System

- The gas industry has a major role to play in helping Europe meet its climate change mitigation ambitions: switching from coal to natural gas in power generation and heating (especially in Central and Eastern Europe); and taking full benefit of all European gas resources, natural, decarbonized and renewable.
- Renewable and low-carbon gases must play a significant role in Europe's future energy mix – including as EU reduces use of nuclear power. Biomethane, synthetic methane and hydrogen can all be used in stand-alone equipment or blended with natural gas in existing infrastructure. Increased use of these gases will make great contributions to delivering Europe's Paris goals.
- Natural gas and hydrogen will play essential part in supporting renewables as Europe continues on its path to a cleaner energy future.
- It is essential that European countries are enabled to pursue strategies and means to reach climate goals based on their individual national circumstances.
- European investments in developing markets that will provide access to natural gas are investments in the future of the planet - bringing energy and electricity to millions of global citizens in a way that will significantly reduce GHGs and deadly air pollution.

Document E, extract 1

IGU Messages to and about Russia, Black Sea & Caspian

Russia, Black Sea & Caspian regions

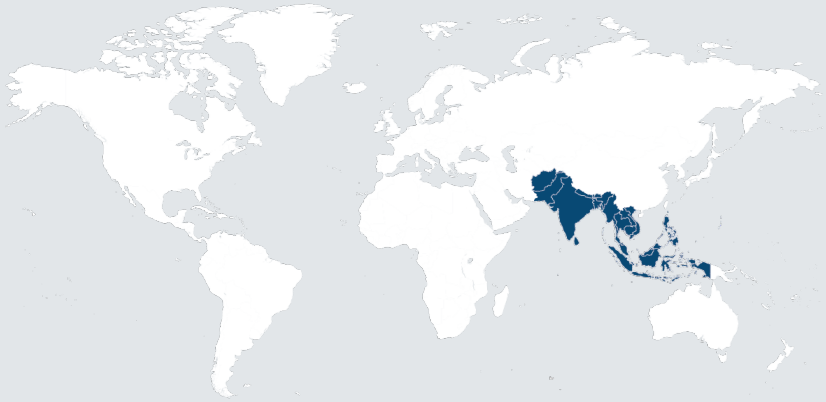
GDP/Capita: US$11,585 Elec Access:100%
CO_2/Capita: 12 MT Coal Reliance:17%

- Russia is the pre-eminent global natural gas actor, able to supply pipeline gas and LNG to two separate geographical markets
- Kazakhstan is very rich in natural gas reserves, production and condensate - Karachaganak is one of the world's largest discovered & producing fields.
- Turkmenistan has 6th largest natural gas reserves in the world but needs infrastructure investment to boost export

- The region's large, reliable natural gas supply continues to help major global markets displace coal and act as potential partner to regional renewables
- Without secure and constant supplies of Russian gas, Europe would be a greater user of coal now and in the foreseeable future
- Russia plays growing role in meeting China's energy needs and displacing coal through Power of Siberia
  - Pipeline capacity is being expanded and additional fields are being connected
- The region is encouraged to continue to address methane leakage from upstream fields and the transmission system
- Russia's efforts to decarbonise gas through pyrolysis should be receiving more attention as it is potentially a very significant development

Document E, extract 1

IGU Messages to and about South and Southeast Asia



South and Southeast Asia

GDP/Capita: US$1,956 Elec Access: 92%
CO_2/Capita: 1.545 MT Coal Reliance: 33%

- Coal reliance remains high in several key economies
- Continued concerns over deforestation to produce biomass for energy
- Local LNG production to decline as region becomes net importer of gas
- India is expected to lead in energy demand growth over the next 20 years.

- An increase in natural gas in South and Southeast Asian economies – displacing coal and biomass – would have dramatic and immediate benefits in reducing GHGs and cleaning the environment.
- New gas infrastructure and increased natural gas usage can propel economies across the region, reducing monetary and energy poverty, and improving lives of millions
  - Developed economies should not deny the region the benefits of such supply that they benefited from for years in Europe and North America.
  - South and Southeast Asia cannot be energised by renewable electricity only.
- It is essential that India's efforts to use domestic gas and imported LNG be successful in meeting economic growth and displacing coal for improvements in air quality and reduction of emissions
- Given regional entrepreneurship and innovation, hydrogen, biogas and renewables gases must be encouraged

Document E, extract 1

IGU Messages to and about North Asia

North Asia

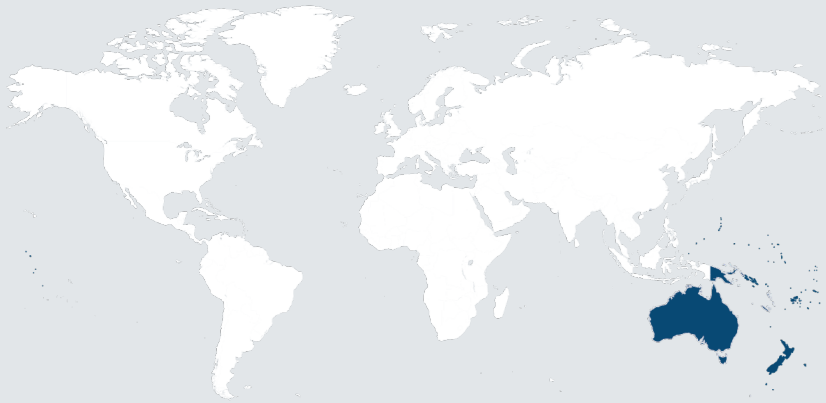
GDP/Capita: US$11,502
CO_2/Capita: 6.072 MT
Elec Access: 98%
Coal Reliance: 55%

- World's three largest LNG import markets (Japan, China and Korea) all have mid-century carbon neutrality targets
- Coal to natural gas switching has delivered cleaner skies to China's major cities.
- Natural gas has secured Japan's post-Fukushima energy supply
- Japan and Korea are leaders in hydrogen innovation and investment.

- Natural gas is critical to energy security and economic activity in Japan, Korea, Chinese Taipei and increasingly important in China.
- Natural gas can play significant role in further helping all three countries reduce CO2 emissions from coal.
- Coal-to-gas switching has played key role in reducing premature deaths caused by urban air pollution.
- All three countries will play significant roles in manufacturing of electrolyzers for green hydrogen production.
- Imports of LNG continue to play critical role in helping Japan address nuclear challenges.
- Natural gas and hydrogen will play essential part in balancing the intermittency of renewables.

Document E, extract 1

IGU Messages to and about Oceania



Oceania

GDP/Capita: ~US$45,000
CO_2/Capita: 10.2 MT
Elec Access: 98%
Coal Reliance: 30%

- Australia vies with Qatar as world's largest LNG producer
- Significant new natural gas resources to be developed in Australia and PNG. Exploration bans prevent NZ development
- NZ a leader in renewable energy with hydro, geothermal, wind and solar providing over 80% of its electricity and 40% of primary energy
- Many island nations of South Pacific still rely on biomass for energy needs

- Natural gas plays major role in reducing coal dependency in power generation.
- Natural gas plays major role in enabling integration of intermittent renewables into energy mix.
- Oil and gas industry a significant investor/enabler of hydrogen.
- Government policies restricting development of new natural gas resources and infrastructure risk slowing the energy transition.
- The development and use of natural gas resources provides significant economic benefits to individuals, homes and businesses.
- The success of Papua New Guinea's upstream gas projects provides LNG exports that bring long-term economic prosperity, and domestic power generation that provides significant socio-economic advantages.

Document E, extract 2

Situation Analysis

- The energy landscape – and the debates that inform it – is shifting at an unprecedented pace.
- Arguments and decisions are taking place right now that will define the energy mix for years to come.
  - Calls for net zero emissions by 2050 are now mainstream.
  - Rhetoric from policymakers, business leaders, media and grassroots organisers has moved more forcefully than ever on climate change – and against all fossil fuels.
  - Energy access remains vital in developed and developing economies
- The gas industry has not been driving key debates and has often found itself in a responsive and defensive position on important topics
- The IGU is responding by updating its positions on core issues, including broadening its mandate to include renewable gases, decarbonised gases and low-carbon gases, in addition to natural gas.
- It is imperative that the IGU positions gas – defined more broadly – as a necessary part of the solution and as a vital component of the world's future energy mix.
- To forcefully and successfully address these challenges, the IGU has revised and re-aligned its approach to public affairs.

Adjusting the Profile of IGU

- Gas industry incorporates broad definition of gas and IGU recognises that renewable gases (including hydrogen), decarbonised gases and low-carbon gases will play significant role in world's future energy mix.
- This in turn provides IGU with broader platform to engage in important energy debates, and deepens rationale for infrastructure investment for governments and development banks.
- IGU will embrace role and potential of gases in its communications, advocacy and outreach. Such activities will include:
  - Reflecting this new position on IGU website, in webinars, and other communications channels
  - Focusing on these themes in broader energy and policy debates
  - Hosting of G20 session on clean gas technologies
  - Publishing of Renewable Gases Report 2021
  - Featuring hydrogen and low-carbon gases in "Current Debates" at WGC 2022

Public Affairs Strategies

- Broaden the terms of the energy and climate debate
  - Communicate within the wider context of achieving UN Sustainable Development Goals; focus on all aspects of the four Energy System Needs
  - Ensure a broader definition of gas to include renewable gases, hydrogen, decarbonised and low-carbon gases
  - Re-assert IGU's voice on key elements of industry's methane mitigation efforts
- Implement a push/pull approach to media and influencer relations
  - Proactively engage via set-piece announcements, events and moments in time
  - Ensure IGU's voice is heard in vital energy debates via a rapid-response capability
- Adopt a mindset of indirectly countering detractors; and directly encouraging neutral voices and engaging allies
- Operationalise and formalise institutional relationships and partnerships with influential stakeholders

Matrix of Key Stakeholders

Priority engagement

COMMUNICATIONS	ADVOCACY	OUTREACH			
Media	Policy Makers/ Multilateral Agencies	Energy Industry Organisations	Environmental Organisations	Think Tanks and Consultancies	Affiliations
Financial Times	World Bank	World Energy Council	Environmental Defense Fund	Oxford Institute for Energy Studies	Gas Technology Institute
Xinhua	Asian Infrastructure Investment Bank	Gas Exporting Countries Forum	Rocky Mountain Institute	Columbia University Center on Global Energy Policy	European Gas Research Group
Economist	African Development Bank	Hydrogen Council		Bloomberg New Energy	Gas Infrastructure Europe
Bloomberg	Islamic Development Bank	International Group of LNG Importers (GIIGNL)		Platts IHS Markit	Natural Gas Vehicle Europe
Reuters	Asian Development Bank	Methane Guiding Principles Group / OGCI		McKinsey	NGV Global
Wall Street Journal	International Energy Agency	Global CCS Institute		Woodmac	IPLOCA
New York Times	International Renewable Energy Agency	International Energy Forum		Boston Consulting Group	Marcogaz
	COP	World Petroleum Council		Brookings Institution	Energy Delta Institute
	Sustainable Energy for All	OPEC		Global investment banks	Pipeline Research Council International
	European Commission	IPIECA			ARPEL
	China National Energy Administration	International Organization of Oil and Gas Producers			Russian Natural Gas Vehicle Association
	US Dep Energy	World LPG Association			International Institute of Refrigeration
	OECD	Gas Naturally			
	UN Environment / UNECE	Eurogas			

Advocacy Approach and Tactics:

Engagement with Policy Makers

IGU will support advocacy activities with governments and supranational organisations, directly and indirectly, with clear and consistent positions on core policy issues, aligned with key positions document

IGU will advocate for:

- Available finance
- Clean air by switching coal/oil to gas
- Natural as economic enabler
- Level playing field on subsidies/ incentives for low/zero carbon gases and related technologies
- Pricing environmental externalities (pollution / emissions)

IGU will advocate against:

- Restricting finance for natural gas network expansion
- Premature closure of, and bans on new, CCGT power stations
- Foreclosing gases in energy development plans

Advocacy Approach and Tactics:

Engagement with Development Banks

- Re-establish - and operationalise - relationships with most important institutions
  - World Bank, African Development Bank, Asian Infrastructure Investment Bank, Islamic Bank
- Explore opportunities for collaboration/alignment
- Set realistic metrics for success over time
- Lead with positive messages to ensure inclusion of gas(es) in energy development plans
- Strive to avoid negative outcomes by demonstrating an understanding of the banks' mandate and covenants:
  - Restricting finance for gas network expansion
  - Premature closing or bans on new CCGT power stations

Outreach Approach:

Engagement with Think Tanks, Industry Associations and Technical Affiliations

- Establish a coalition of like-minded entities focused on an informed, balanced and pragmatic energy dialogue
- Maintain/build collaborative partnerships with top-tier think tanks and consultancies
- Explore opportunities for collaboration/affiliation with aligned industry associations
  - Emphasis on infrastructure/gas for transport/regional organizations
- Engage constructively with environmental organisations where possible
  - Find common ground and demonstrate seriousness of purpose on issues such as methane mitigation

Document F, extract 1

Attachment A: Task Force Members and contributors during Phase 1

1.	[redacted]	Chair
2.	[redacted]	Vice Chair, Shell Korea
3.	[redacted]	Secretary, AGL Energy, Australia
4.	[redacted]	Canadian Gas Association
5.	[redacted]	World Bank Group
6.	[redacted]	Engie
7.	[redacted]	GAIL
8.	[redacted]	Gazprom
9.	[redacted]	GIIGNL
10.	[redacted]	IGU (Kogas)
11.	[redacted]	IGU
12.	[redacted]	Israel Oil & Gas Org
13.	[redacted]	Malaysian Gas Association
14.	[redacted]	Malaysian Gas Association
15.	[redacted]	Shell
16.	[redacted]	Shell
17.	[redacted]	Sonatrach
18.	[redacted]	TAQA
19.	[redacted]	TAQA
20.	[redacted]	WLPGA
21.	[redacted]	IEA
22.	[redacted]	SEforALL

Document F, extract 2

Title Page

Executive Summary

The Task Force *Energy for All* was established by the Korean Presidency of the International Gas Union (IGU) in June 2018 for the duration of the research triennium June 2018 to June 2021.

The Task Force aims to show how energy access facilitates economic development and promotes the critical role that gas plays in providing access to cleaner, sustainable energy. It also aims to show how such development contributes to the United Nations Sustainable Development Goal #7 (SDG7): *Ensuring Access to Affordable, Reliable, Sustainable and Modern Energy for All*[1] and assisting meet COP21 targets[2].

This report is issued as an internal IGU report and is the first of two reports issued in Phase 1 of the Task Force mandate. A summary is provided of four case studies of Korea, Malaysia, Egypt and India. In addition, key conclusions from relevant studies by IHS Markit and Breakthrough are included.

Conclusions from the research include:

It takes large amounts of energy to facilitate economic development of a country or region and reduce energy poverty at a meaningful scale - this has been achieved by the supply of natural gas by pipeline and by shipped LNG.

Natural gas has provided an affordable energy supply to fuel economic growth and prosperity in countries without indigenous resources. Gas has also transformed economies in resource-rich countries and created jobs and prosperity.

With the development of natural gas infrastructure, more communities can be connected to natural gas, resulting in cleaner fuel for power and transportation, as well as heating and cooking – contributing to the aims of SDG7.

Natural gas has also contributed significantly to cleaner air and lower GHG emissions in the regions it is used in.

Gas transported by pipeline or ship can access remote parts of the world at competitive prices.

Large quantities of gas can have a multiplier effect such as launching new industries and the uptake of CNG vehicles.

Strong government policy support, substantially large foundation customers and incentives to take up gas solutions are essential to facilitate the introduction and long-term use of natural gas.

The overarching messages are:

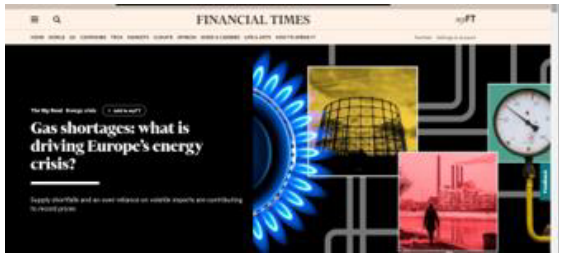
Under the combined targets of reducing energy poverty whilst addressing energy security, affordability, emissions and climate change, when natural gas is used as a main fuel, it provides the means to reach regional economic growth and prosperity.

Natural gas can significantly help address the critical global development issue of energy poverty by being an affordable, reliable source of large quantities of energy.

Natural gas can be supplied to countries in sufficient quantities to improve the reliability of power and heating and thereby contribute significantly to the aims of SDG7.

[1] https://sustainabledevelopment.un.org/sdg7
[2] https://unfccc.int/process-and-meetings/the-paris-agreement/the-paris-agreement

Constant institutional engagement and positive interaction



The Economist

Bloomberg

REUTERS®

IEF

CGEP

IRENA
International Renewable Energy Agency

WORLD ENERGY COUNCIL

Hydrogen Council

iea

gas naturally

United Nations

GECF

ADB

THE WORLD BANK

INTERNATIONAL MONETARY FUND

G20 ITALIA 2021

J.P.Morgan

European Bank for Reconstruction and Development

Document G, extract 2

Deliverables Public Affairs 2022

"Ensure IGU Relevant in London & beyond and in the Energy Transition"

Deliverable	Date	Comment
LATAM platform • 6 regional / thematic digital dialogues and 1 major event • Amplification through IGU channels • Provides platform for IGU brand and messaging • Provides platform for IGU regional co-ordinator to play leadership role	Ongoing	Low cost, decent impact
Africa • Repeat LATAM success – create a virtual platform with established partners with targeted in person event H2 2022 • Choose partners – event management / regional association etc		Consideration of risk reward dynamic vital.
G20 • Engage Indonesian G20 Presidency to continue engagement • Hold special information briefing in Jakarta		
COP27 • Ensure appropriate engagement	November 2022	
Methane Management of GEME Ongoing engagement in key global dialogue (IEA, MGP, UNE, etc.) Strategy & implementation	• Monthly GEME meetings • Regular engagement	Needs enhanced activity, positioning and content creation

Discrete Engagement at COP26

The world has moved on significantly since previous COP

This is not the time or place for IGU to make a big public show - COP is a global warming and sustainability event.

All intel suggests high risk / minimal reward of high profile IGU Management engagement. Most stakeholders sending small teams. Avoid IGU becoming target for environmental lobbyists / protestors

1. **Primary goal** = intelligence gathering to inform post COP engagement

2. **Secondary goal** = be seen to be there by institutions we care about eg IEF / EDF / banks / members

IGU PA Team will attend COP 3-5th November in person and virtually 10th / 11th

The most efficient risk / reward option for IGU – especially given current internal issues

Public Affairs Operations Review: enhanced level of content

Enhanced level of content to drive positive external engagement, with a focus on sustainability and socio economic value creation. Approx. 2 per month + GVOG. Amplified through social channels

This is a core ingredient in IGU communication strategy – less about individuals – **more about the institution**

Global Renewable Gasses Report – based on wholesale pricing report to be published and distributed in last week October / first week November – to be further amplified through multiple channels & content options

Methane:blog to demonstrate the significant progress made by the gas value chain and ongoing progress

Vietnam: proposed blog on gas driving sustainable development & socio economic value creattion

Global Voice of Gas December 2021 – "Energy security and volatility management"

Webinar and online forums
IGU has hosted five webinars accompanying the release of key IGU reports:

27 April – Targeted global journalist Webinar on the release of the IGU World LNG Report 2020

2 July – Public and Member Webinar on the release of the IGU's Wholesale Price Survey, 2020 Edition

7 July – Member-only pre-release webinar of the new Gas Technology and Innovation for a Sustainable Future report

15 July – Member-only pre-release webinar of the Global Gas Report, 2020 Edition, with a special chapter on the latest developments on Hydrogen.

15 December – Member-only webinars on Pandemic Toolkit providing insight to operational adjustments and leading practices to ensure that the system, employees, and customers remain safe through the crisis and uninterrupted service continues.

IGU also participated in numerous online forums, including events organized by the Slovak Gas Association, PEPANZ and the Hellenic Energy Transition Symposium.

Cooperation with International Organisations
The IGU is generally aiming to increase cooperation with other international organisations to avoid overlap, to benefit from each other's activities and work programmes and to increase its visibility on the global arena. Collaboration and relationship building with these organizations is critically important, as they can be influential in the fuel choice that countries make.
To this end, the IGU has prioritized these relationships in tiers requiring different levels of management and engagement.

G20
IGU has actively participated in the Energy Sustainability WG(ESWG)/ Energy Transition WG meetings since 2013 and contributed to the important work undertaken. In 2020 IGU delivered two presentations at G20 ESWG workshop in Riyadh on Energy Security and Resilience and the Role of Gas in the Circular Carbon Economy. Public Affairs team completed the first Gas and Renewables report (on Ontario) which was used for G20's Energy Security and Resilience presentation
The IGU has also leveraged this opportunity to stage Gas Day, first in Beijing, China in 2016 and the second and third edition in Bariloche, Argentina and in Tokyo, Japan in June 2018 and 2019 respectively. Due to the pandemic, no Gas Day was organized in 2020.

World Bank (WB)

The IGU has had a long-term relationship and MOU with the World Bank. The IGU has collaborated with the Bank on a number of competence transfer seminars, primarily in Africa seeking flaring reduction. In 2019 a new policy of investment was deployed by World Bank and IGU is restructuring the relationship with the WB. IGU President met WB Director and a new collaboration pathway are underway.

United Nations Economic Commission for Europe (UNECE)

The IGU has and MOU to collaborate through UNECE´s Committee on Sustainable Energy and its subsidiary Group of Experts on gas, and being active in the UNECE gives access to UNECE member States that includes Europe, USA, Canada, Russia and Central Asia.

IGU participated in several UNECE meetings, including UN International Forums on Energy and organizing the Gas Sessions on Geneva as members of the Bureau on the main topics. IGU Secretary General presented the 2020 LNG Report at the UNECE ON LINE DIALOGUE in June under the moto of "99 minutes of LNG - trends, developments, and innovative end-uses " and also presented the IGU vision on Gas for Transportation at the UNECE workshop on 12th December 2020.

UN Environment

IGU has develop during last years a collaboration with the UN global environmental authority that sets the global environmental agenda, and has bring the IGU approach and studies through exchanging information on common topics and UNE has participate on IGU conferences. IGU has collaborate on the Climate and Clean Air Coalition that UNE currently holds the Secretariat.

IEA

IGU participated in the IEA's regulatory workshop, the annual meeting of the Methane Experts' Group in 2020 held in Paris.

Methane Guideline Principles

Reducing Methane emissions across the natural gas supply chain remained a critical subject of global energy dialogue and continued to increase profile in industry. IGU became an associate signatory to the critical industry consortium – the Methane Guiding Principles. IGU committed to contribute to disseminate the information about methane issue and best available practices for reducing emissions. To this end, in 2020, IGU have developed a training seminary session on Methane Reduction during IGRC2020 in Oman towards high level managers attended by delegated and industry representatives coming from different countries in the region.

Gas Naturally

IGU rejoined GasNaturally in 2019 with the objective to support its European activities and work through its network to advocate for the important role that gas plays in a sustainable energy future.

GasNaturally brings together seven organisations within the gas industry; EUROGAS, European Gas Research Group (GERG), Gas Infrastructure Europe (GIE), International Association of Oil and Gas Producers (IOGP), Marcogaz and NGVA Europe.
GasNaturally's mission is to highlight how, by using gas, we can make a clean future real. With addressing the climate change challenge featuring high on the global agenda, GasNaturally takes the lead role in demonstrating how the gas industry stands ready to help Europe reach its 2030 climate and energy objectives, and its commitments under the Paris Agreement.

Key activities with Gas Naturally during 2020 includes:

- Letter on gas contribution to sustainable transportation
- IGU appointed representatives in Operations Committee
- IGU participating on President Meeting preparing the 2020 communication plan
- Letter on gas contribution to net zero emission through H2 and CCS technologies
- Contribution on document about methane emission reduction.

SEForALL

In 2018 IGU signed an Agreement to explore areas of collaboration and SEForAll has been invited to participate in the work of the IGU´s Task Force 2 – Gas for All, and SEForALL has invited partners to participate in the next SEForALL Forum

International Energy Forum (IEF)

The IGU and IEF organise the Ministerial Gas Forum every two years to bring together industrial and political leaders to discuss the role of natural gas in energy policies around the world. The 7th IGU-IEF Ministerial Gas Forum took place in Kuala Lumpur in Malaysia in 2020 with the theme "Towards Recovery and Shared Prosperity: Natural Gas Opportunities for a Sustainable World."

World Energy Council (WEC)

The Secretary General of the IGU represents the Union in the meetings of the Executive Assembly of World Energy Council, and the IGU normally participates in the gas sessions of the World Energy Congress organised by the WEC. In 2019, IGU President spoke at the 24th World Energy Congress in Abu Dhabi, UAE in September 2019.

World Petroleum Council (WPC)

The IGU normally participates in the natural gas sessions at the Congresses organised by the World Petroleum Council and the Secretary General attends its annual meetings.

Affiliated Organisations

It is the declared policy of the IGU to increase and rationalise co-operation with other international organisations within the energy sector. The expression "affiliation" might be used to describe a closer pragmatic working co-operation and rationalisation between the IGU and a global or regional organisations within the energy industry. Below are the list of IGU Affiliated organisations.

- Regional Association of Oil, Gas and Biofuels Sector Companies in Latin America and the Caribbean (ARPEL)
- Energy Delta Institute (EDI)
- Gas Technology Institute (GTI)
- GERG (European Gas Research Group)
- Gas Infrastructure Europe (GIE)
- The International Group of Liquefied Natural Gas Importers (GIIGNL)
- NGVA Europe
- International Petroleum Industry Environmental Conservation Association (IPIECA)
- The International Pipeline & Offshore Contractors Association (IPLOCA)
- Marcogaz
- Pipeline Research Council International, Inc (PRCI)
- Russian National Gas Vehicle Association (NGVRUS),
- World LPG Association and the
- Federation of Indian Petroleum Industry (FIPI)

5. Publications

As the global voice of gas, IGU seeks to improve the quality of life by advancing gas as a key contributor to a sustainable energy future. Official publications by the IGU are an important means to accomplish this. These publications, consisting of various position papers, recommendations and results of IGU-organised or joint studies, serve to enhance the image, authority and global reach of the IGU in a local and global gas context. Such publications are available either online and/or in printed form.

The types of IGU publications are defined as follows:

1. Papers and Reports produced by IGU Committees and Task Forces under the umbrella of the Coordination Committee (CC)
2. Papers and Reports commissioned by the IGU Presidency and/or Secretariat
3. Papers and Reports presented during conferences
4. Joint publications with other organisations

The following publications can be found on the IGU website:

- IGU Articles of Association
- IGU Code of Ethical Business Conduct
- IGU Procedures
- Triennial Work Programme
- IGU Organization Chart
- IGU Membership Brochure

Document 1, extract 1

IEF

7th IEF-IGU Ministerial Gas Forum KUALA LUMPUR, 2020

IGU

TOWARDS RECOVERY AND SHARED PROSPERITY
NATURAL GAS OPPORTUNITIES FOR A SUSTAINABLE WORLD

THURSDAY, 3 DECEMBER 2020

4:00 PM

INAUGURAL ADDRESS (open to media and press)

- [redacted] Malaysia

4:15 PM

WELCOME AND OPENING REMARKS (open to media and press)

- [redacted] Malaysia
- [redacted] PETRONAS
- [redacted] International Gas Union (IGU)
- [redacted] International Energy Forum (IEF)

VIRTUAL GROUP PHOTO SESSION 1

5:00 PM

PANEL SESSION 1 ASIA - EUROPE, THE MIDDLE EAST, AND AFRICA

Opportunities in Growing Gas Markets: Producer-Consumer Perspectives on New Realities

Keynote addresses by Ministers

- [redacted] Russian Federation
- [redacted] India
- [redacted] Qatar
- [redacted] Nigeria
- [redacted] Bangladesh
- [redacted] Brunei Darussalam
- [redacted] Azerbaijan
- [redacted] Egypt
- [redacted] Bahrain

Interventions by Industry Leaders and Heads of International Organisations

- [redacted] ESCAP
- [redacted] Dana Gas
- [redacted] Eni
- [redacted] Economic Research Institute for ASEAN and East Asia (ERIA)

IEF

7th IEF-IGU Ministerial Gas Forum KUALA LUMPUR, 2020

IGU

	• [redacted] Boston Consulting Group • [redacted] Cheniere
6:00-6:40 PM	**Participants Interventions**
7:00-7:30 PM	**PAUSE & VIRTUAL PRESS CONFERENCE** • [redacted] Malaysia • [redacted] International Gas Union (IGU) • [redacted] International Energy Forum (IEF)
9:30 PM	**WELCOME REMARKS** • [redacted] Malaysia **VIRTUAL GROUP PHOTO SESSION 2**
9:45 PM	**PANEL SESSION 2 ASIA - THE AMERICAS, EUROPE, THE MIDDLE EAST, AND AFRICA** **Market Signals & Policy Pathways: Investment and Innovation on the Road to Recovery** **Keynote address by Ministers** • [redacted] United States of America • [redacted] Iraq • [redacted] Colombia • [redacted] Saudi Arabia • [redacted] Canada • [redacted] Morocco **Interventions by Industry Leaders and Heads of International Organisations** • [redacted] Total • [redacted] Tellurian • [redacted] Gas Exporting Countries Forum (GECF) • [redacted] Royal Dutch Shell • [redacted] Royal Vopak • [redacted] King Abdullah Petroleum Studies and Research Center (KAPSARC)
10:50-11:30	**Participants Interventions**

IEF

7th IEF-IGU Ministerial Gas Forum KUALA LUMPUR, 2020

IGU

11:30 PM	**CONCLUDING REMARKS (open to media and press)** • [redacted], [redacted] Malaysia • [redacted], [redacted] International Gas Union (IGU) • [redacted], [redacted] nternational Energy Forum (IEF)

institutions such as the Financial Times, JP Morgan and the OIES. This is part of a strategy to demonstrate the value of a positive relationship with the IGU and to demonstrate how the IGU can and will continue to be a persuasive and objective voice for the international gas value chain. This in turn will allow IGU messages to resonate with those that we wish to influence – as per the COAP strategy presented to EXCOM.

Preparation for Global LNG Report

The Public Affairs Directorate is in the final stages of completing both this year's Global LNG Report and its associated communications amplification operation. The core message is that LNG's inherent flexibility was both a vital pillar in Global society's ability to keep the lights on during the pandemic, and will be equally valuable during the recovery period.

Social Media Campaign to Celebrate Role and Players in Natural Gas

Under the umbrella of IGU's 90th anniversary celebration, this campaign continues to publicly recognize members of the IGU for their contributions to building the global gas industry. The campaign is running on social media channels LinkedIn and Twitter, real impact of this actions are reflected in an increase of 20% of IGU followers.

EVENTS

WGC2022

The National Organizing Committee is delighted to announce that registration for the 28th World Gas Conference is open from Sunday 23 May 2021. Join us in South Korea on 23-27 May 2022 to hear from global gas leaders, policymakers, distinguished energy officials and technical experts on the future of energy industry. The exhibition at WGC2022 is being very well supported by the industry. With twelve months to go, 82% of the floorspace is already allocated with only 12 main aisle locations remaining. 9 special pavilions will cater for specific industry segments, including a new hydrogen pavilion. Find out more at www.wgc2022.org

Document k, extract 1

[redacted]

North America

There is something of a perfect storm of public and activist policy targeting the gas sector:

(1) From above (i.e from governments) there is a very strong emission reduction agenda which is invariably manifesting itself as an electrification agenda.
(2) From the ground up (through coordinated campaigns) is a push to ban gas delivery.
(3) In parallel with these is a market campaign, driven by activists, pushing for divestment

And yet, even as this occurs, natural gas usage continues to grow, building on its core value propositions:

(1) The fuel remains the most affordable option, a growing advantage given rising electricity prices.
(2) The reliability advantage is gaining traction - underscored by events like this winter's storm in Texas.
(3) The innovation agenda is expanding quickly on fuels (RNG, hydrogen), efficiency, CCUS and more.

Significant public dollars are being put on the table to underwrite some of the broader green agenda. However, there is a sense that the bill on public spending is coming due soon, and the value proposition of gas will only grow in a tougher economic climate.

These are difficult times for the industry but, if it can remain nimble and get ahead of the discourse rather than just responding to it, it should weather this.

Document k, extract 2

[redacted]

Europe

- After an exceptional 2020, 2021 has confirmed gas demand resilience, with final data of the first part to confirm what can be an almost 5 year highs, with hub prices again in the 20-25 €/MWh range.
  - European gas flexibility for heating purposes was also magnified in early April where a widespread cold snap reversed storages from injecting around 200 mcm/d to withdrawing more than 300 mcm/d in just a couple of days!
  - At the same time a strong upward trend in CO_2 pricing, in the 50+ €/ton range, almost doubling the 2020 average
- Gas flows have also further demonstrated the European increasing role as a balancing hub for the global gas trade, with LNG dynamics and underground gas storage utilization very closely correlated in a context of increasing price volatility, which will be the dominant element in markets also in 2021
- New gas infrastructures in South-South East Europe to further improve regional integration, foster security of supply and allow gas to positively contribute to the decarbonisation path:
  - TAP (Trans Adriatic Pipeline), Balkan Stream and the Krk Terminal started operations
  - LNG Terminal in Alexandroupolis received EU Financing for construction
- European gas competitiveness, flexibility, sustainability and innovation will continue being crucial for our industry especially considering the upcoming "*legislative tsunami*" that will address in the coming months almost every single aspect of the energy space in the region.
- And Europe is home to G20 (with the IGU event on the "Critical role of molecules in securing energy supplies for sustainable inclusive recovery and energy transition") and COP26

The Path to Daegu:

Public Affairs Plan update - Outreach

Outreach

Set-piece moments and ad-hoc commentary with amplified content and engagement

Engagement with think tanks	Engagement with Oxford IES, BCG, Platts HIS Markit
Partnerships with industry associations and conferences	Participated in following meetings:
Alignment with technical affiliations	GasNaturally, MGP and LNG Protocol. Engagement with WLPGA to consider future co-operation