

PARIS – 20/04/2023

ADVOCACY



ADVOCACY WG

Working Group Leader:

- Marcus George (Shell)

Members involved:

- Laurent Hamou (Elengy)
- Maria A. de Vicente (Enagas)
- Luis I. Parada (Enagas)
- Cosimo Martucci (Eni)
- Rajesh Jain (Gail)
- Andrea Qualiano (Edison)
- Gabriele Laurino (Edison)
- Derek Wong (Excelerate Energy)
- Jakub Przyborowicz (Gaz System)
- Gavin Stevens (MOL)
- Carlos Humphrey (Naturgy)
- Laurent Chaveron (TotalEnergies)



AGENDA

1. **Shell LNG Outlook 2023** (Full Shell LNG Outlook 2023) ([link](#)) and webpage ([link](#))
2. **LNG Advocacy**
 - **Americas:**
 - **Permitting Reform:** high on the agenda to enable the potential of the Inflation Reduction Act
 - **Lower Energy Cause Act:** under discussion in Congress to make O&G projects go ahead (supported by the Republicans but Democrats threaten to veto)
 - **Following Inflation Reduction Act,** more attention paid to bioLNG, green methane and emphasis on developing “hydrogen hubs”
 - **Asia:** Security of Supply high on the agenda vs less interest on GHG compensation
 - Australia: introduction of price caps, limit exports in case of short supplies
 - Singapore: Government purchased LNG vessels and established strategic storage (FSRU) that electricity companies could use to prevent prices going up
 - Thailand: market opening: open importation to new market entrants (7) who will be allowed to bring the LNG into the pool price
 - Philippines: new LNG import terminal, awaiting to bring the first commissioning cargo
 - **Europe:**
 - ACER (Agency for the Cooperation of Energy Regulators) is providing a public price for LNG Trade
 - Disconnection between European needs for more LNG vs. Fitfor55 Package (Decarbonization package)
 - Demand destruction (Gas demand down by 13% in 2022, 4% in gas to power and 20% in industry)
 - Ongoing discussion on regulation on imports of renewable energy.





Shell LNG

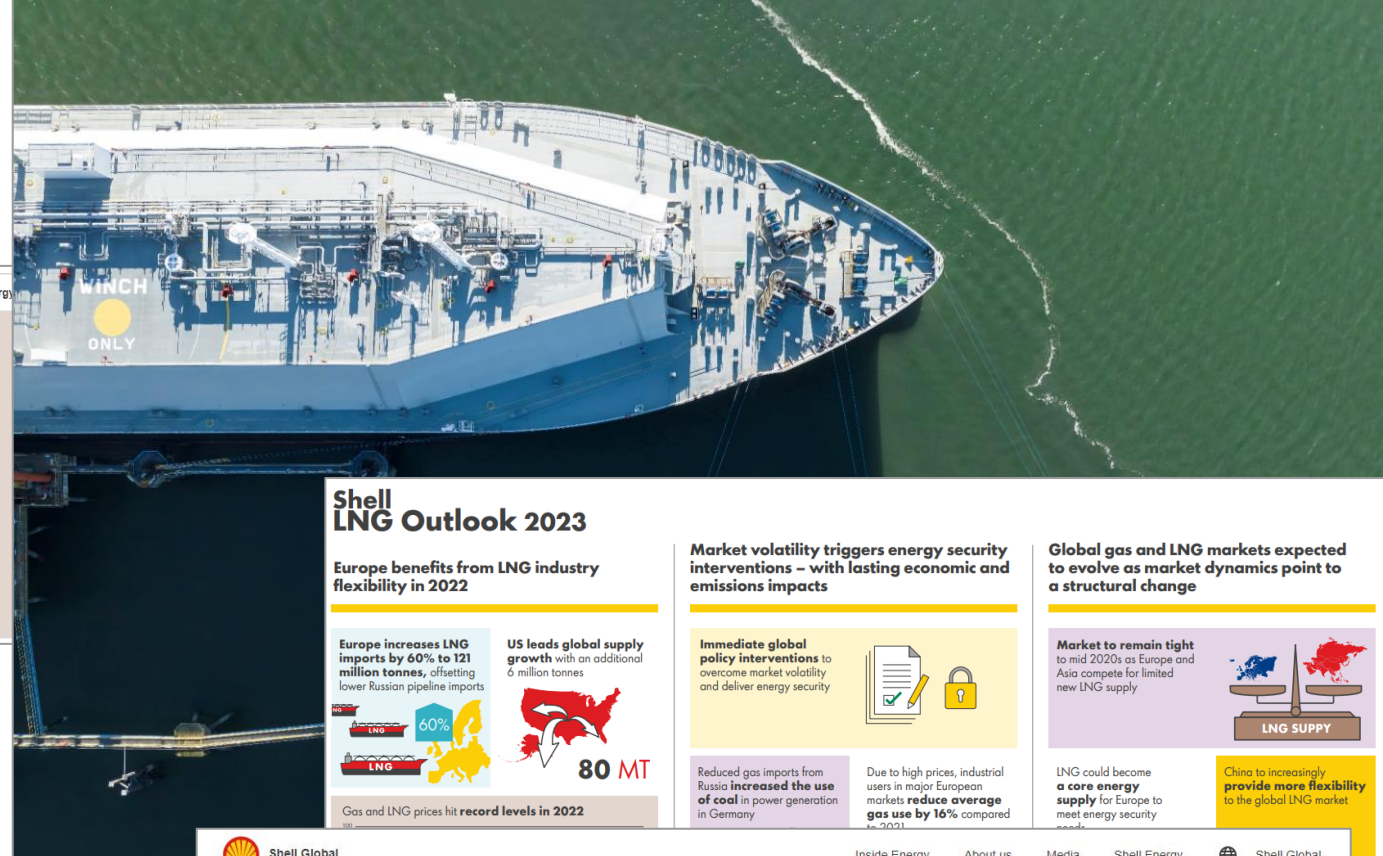
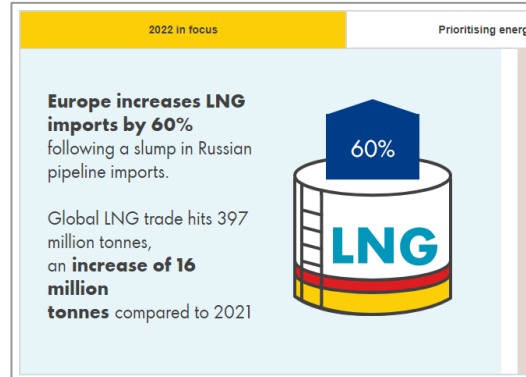
Outlook 2023



MATERIALS

LNG Outlook 2023 Toolkit

- Content
 - Slide pack
 - Speaker notes
 - Infographic
 - Q&A
- Digital
 - shell.com/lngoutlook
 - Social media posts
- Branding
 - Web banner
 - Event banners, backdrops
 - Invites



Shell 🐼 @Shell · Feb 16

Europe's appetite for liquefied natural gas is set to intensify competition with Asia for limited supply available over the next two years.

More in the Shell LNG Outlook 2023:



shell.com

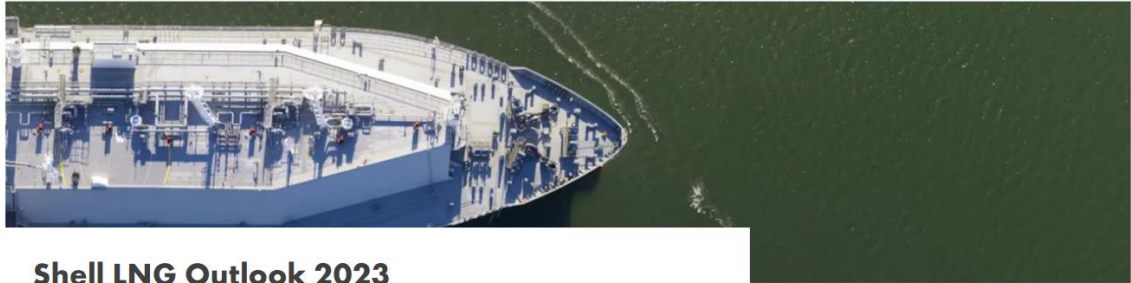
Shell LNG Outlook 2023 | Trends in the global LNG market | Shell Glo...

Read the Shell LNG Outlook 2023 which explores key trends in the industry over the last year and the emerging picture for future LNG ...

Shell Global

Home Our strategy: Powering Progress Business customers Energy and Innovation Sustainability Investors Careers at Shell

Home > Energy and Innovation > Natural gas > Liquefied natural gas (LNG) > Shell LNG Outlook 2023



Shell LNG Outlook 2023

European countries and the UK imported 121 million tonnes of LNG in 2022, an increase of 60% compared to 2021, which enabled them to withstand a slump in Russian pipeline gas imports.

CONFIDENTIAL

GLOBAL LAUNCH



MEDIA COVERAGE

REUTERS® World Business Legal Markets Breakingviews Technology

Grid & Infrastructure Exploration & Production **LNG** Gas

3 minute read · February 16, 2023 10:51 AM GMT · Last Updated 19 days ago

European demand to boost LNG competition over next two years - Shell

By Marwa Rashad and Emily Chow

upstream ENERGY EXPLORED Latest News Exclusive Regions Field Development LNG Energy Transition e-paper

LNG See all articles

Alert me about LNG



Competition between Europe and Asia driving tighter LNG market

'Structural gap' in Europe will continue to fuel demand, but China will become a peripheral buyer, according to Shell

OFFSHORE ENERGY

Energy Intelligence

Shell Sees China Playing Balancing Role in LNG

Copyright © 2023 [Energy Intelligence Group](#) All rights reserved. Unauthorized access or electronic forwarding, even for internal use, is prohibited.

Thu, Feb 16, 2023

Author: [Tom Daly, London](#) Editor: [Michael Sultan](#)

[Back to overview](#)

[Home](#) > [Clean fuel](#) >

Bloomberg UK

Live Now Markets Economics Industries Technology Politics Wealth Pursuits Opinion Businessweek Equality Gre

Europe's Energy Crunch

Europe Will Be Hungry for LNG for Years, Shell Says

Shell: Europe's LNG demand to intensify competition and dominate trade in the long term

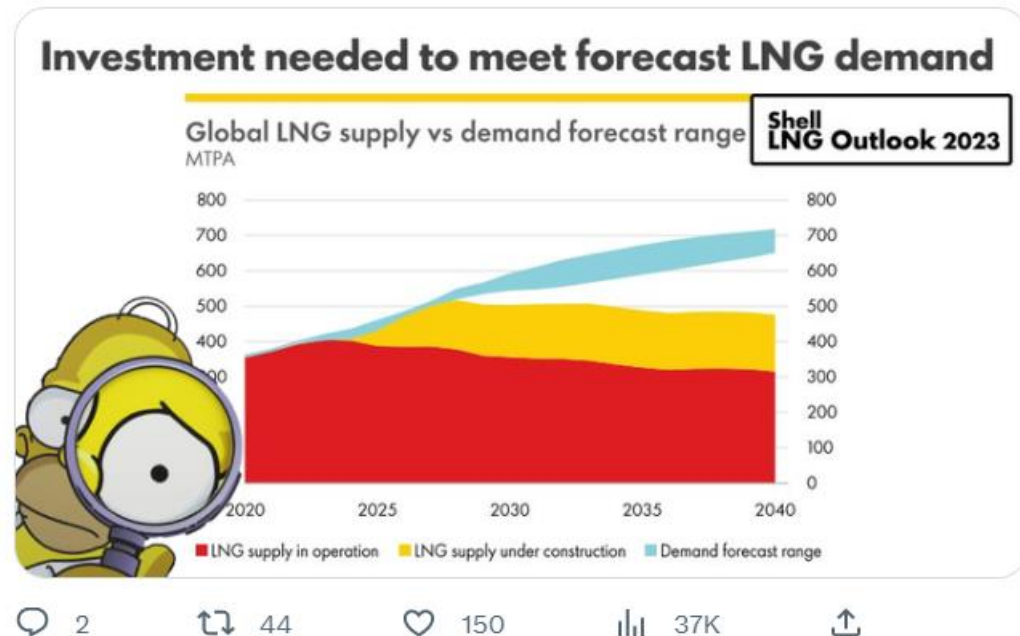




Stephen Stapczynski ✓ @SStapczynski · Feb 17
Shell warned in their latest **outlook** that the world needs to invest more in **LNG** supply to avoid a looming shortage ⚠

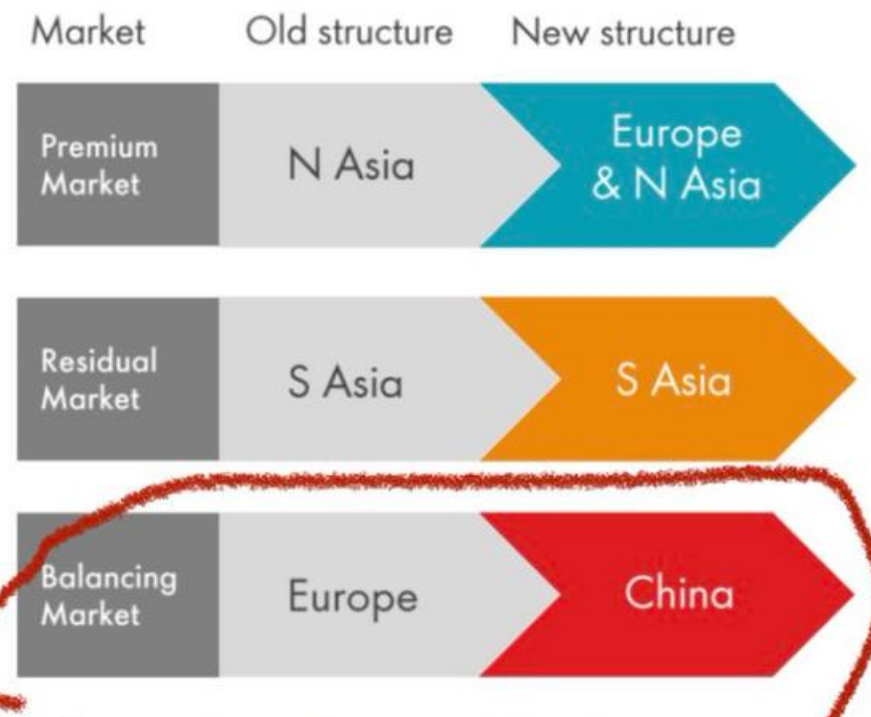
They say that every year

Let's take a walk down memory lane in this thread 🔍



Stephen Stapczynski ✓ @SStapczynski · Feb 20
“China is evolving from being a rapidly growing import market to playing a more flexible role with an increased ability to balance the global **LNG** market,” **Shell** said in its annual **LNG outlook** report released last week 🇨🇳 🚢

Global LNG market structures



COUNTRY EVENTS



The Institute of Energy Economics, Japan (IEE... @IEEJ_J... · Mar 7 ...

A pleasure to welcome Mr. Steve Hill, Executive Vice President Energy Marketing, **Shell** to learn “**Shell LNG Outlook 2023**” at the 27th IEEJ Global Webinar.

Video 📺 tiny.cc/Of15vz

*IEEJ Corporate members only

Shell LNG Outlook: tiny.cc/4f15vz



Prasar Bharati News Services & Digital Pl... @PBNS_I... · Mar 10 ...

Union Minister [@HardeepSPuri](#) participated in the **Shell LNG Outlook 2023**.

He also laid the foundation stone of [@Shell_India](#)'s first **LNG** Station in Palsana, Gujarat.

[@PetroleumMin](#)





Exploration & Production

Fuel Oil

LNG

Transport Fuels

Gas




2 minute read · January 25, 2023 8:34 AM GMT · Last Updated 3 months ago



LNG industry body sees first carbon neutral cargo delivery to Taiwan

Reuters

 Companies

Shell PLC

Follow

KUALA LUMPUR, Jan 25 (Reuters) - The first carbon neutral liquefied natural gas (LNG) cargo using the emissions monitoring and verification framework set up in 2021 by an international industry body has been delivered to Taiwan.

