

Report from CSLF Stakeholders

May 4, 2017

Mid-Year Meeting

Abu Dhabi, UAE

Dipka Bhambhani

Communications Director

United States Energy Association



Background on Stakeholder Activity

“The CSLF recognizes that stakeholders – those organizations that are affected by, and can affect, the goals of the CSLF – form an essential component of CSLF activities. Their views and contributions are important to the success of the CSLF.”

-www.cslforum.org

- Since 2003, stakeholder participation has been varied.
 - Increases at ministerial meetings
 - Location plays a factor
 - Diminished travel budgets have reduced ability of key players to participate such as oil, gas, and coal industries

Overview of New Approach

- Conduct four regional meetings before 2017 Ministerial CSLF Meeting

<u>Americas</u>	<u>Europe</u>	<u>Middle East/Africa</u>	<u>Asia/Pacific</u>
May 25, 2017	September, 14 2017	October 25 & 26, 2017	TBD, 2017
Washington, DC	Brussels	Riyadh	

- Regional action will be spearheaded by the following champions:
 - Americas: USEA, Barry Worthington
 - Europe: CCSA, Theo Mitchell and CO2GeoNet, Sergio Persoglia
 - Middle East: SABIC, Pieter Smeets/Hamoud Otaibi
 - Asia: Japan CCS Co., Ltd, Jiro Tanaka

CSLF Regional Country Members

Europe

European Commission, France, Germany, Greece, Italy, Netherlands, Norway, Poland, Romania, Serbia, United Kingdom

Asia/Pacific

Australia
China
India
Japan
Korea
New Zealand
Russia

Americas

Brazil
Canada
Mexico
United States



Middle East/Africa
Saudi Arabia
South Africa
United Arab Emirates

Regional Meetings

- Regional champions were selected based on their knowledge of the regional community and core hurdles.
- Survey will be distributed to gather baseline data throughout all four regional meetings
- Information will be synthesized into one set of recommendations for 2017 Ministerial CSLF Meeting with varied regional outcomes
- Regional Meetings will accomplish the following:
 - Invite all key stakeholder groups
 - Analyze survey data
 - Identify and discuss deep dive topics
 - Identify new stakeholder groups to broaden CSLF engagement
 - Conclude with a written statement
 - Other issues as appropriate

Regional Meetings Illustrative List of CSLF Stakeholders

- Oil and gas production companies
- Fossil fuel electric generators
- Coal producers
- CCS equipment manufacturers
- Engineering companies
- Research organizations
- Universities, colleges, trade/technical schools
- Labor unions
- Sub-national governments/regulators
- Law firms
- Financial firms
- Consultants
- Associations
- Environmental NGOs
- Think tanks
- Energy consumers
- Industrial chemical/petrochemical processors
- Cement/steel industries
- Others

Regional Meetings Model

Agenda Methodology

- The day would consist of a series of 4-5 panels, with a strong focus on leaving plenty of time for discussion.
- In order to keep panelists on time and discussion on topic, it is imperative that regional champions choose strong moderators.
- The regional champions, in addition to hosting the event locally, will provide an option for WebEx so that stakeholders unavailable to travel will still have the opportunity to be involved in the meeting.

Regional Meetings Model

Agenda Methodology

- The model presents two panel topics (Regional Champion overviews, Project Lightning Round, and the distribution of the CSLF Stakeholder survey) that will remain pillars of the regional meetings
- The substance panels (i.e. Finance, Regulatory, Communications etc.) will cater to regional specific needs, with those listed as a mere illustrative examples, not intended to be exclusive. It is intended that the substance panels will change based on regional priorities.
- The model leaves open the option for a luncheon speaker, in the event that an issue of regional priority does not fit into the framework.

Survey

- Administer to regional meeting participants
- Broken into three distinct parts:
 - Section 1- CSLF questions
 - Section 2- CCS questions
 - Section 3- Participant questions
- Responses will remain anonymous
- Survey will be distributed to regional stakeholders either during the meeting or electronically prior
- Results will be displayed collectively on CSLF website to ensure provide a transparent, consistent mechanism for stakeholder feedback

Section 1: CSLF questions

How often do you attend CSLF events, such as annual meetings? Please select from the dropdown box below.

-- Select --

Which topics are you or your organization most interested in addressing at a regional event:

- Regional Issues
- Site Visits
- Topical Deepdives
- Other (please indicate below)

Should we include participants from nonmember CSLF countries in regional stakeholder events?

- Yes
- No
- No Opinion

Section 1: CSLF questions

How often should the CSLF hold stakeholder events?

- Semiannually (twice a year)
- Annually (every year)
- Bi-annually (every 2 years)
- Other (please indicate below)

What can the CSLF do to further improve stakeholder engagement and relationships?

Next

Section 2: CCS questions

Please rate how significant the following issues are to your organization from not significant (1) to very significant (5).

Not Significant

Very Significant

Achieving policy parity or carbon valuation

Improving CCS awareness and understanding within financial communities

Building a simplified mechanism for international collaboration

Increasing RD&D (both financial capital and human capital)

Investment in 2nd/3rd generation R&D (like modularization, utilization like synthetic fuels)

Improving current technology (i.e. capture tech., compression tech., etc)

Improve public perception; grow public awareness

Gain more political momentum

Knowledge sharing networks among researchers and project networks

Increase funding and researchers involved with CCS

Improving human capacity especially in developing countries

Section 2: CCS questions

Please rate the effectiveness the following mechanisms for achieving policy parity from not effective (1) to very effective (5).

	Not Effective	Very Effective
Accelerated depreciation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Carbon valuation (i.e cap and trade or carbon tax)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Clean development mechanism	<input type="checkbox"/>	<input type="checkbox"/>
Contracts for differences	<input type="checkbox"/>	<input type="checkbox"/>
Feed-in-tariffs	<input type="checkbox"/>	<input type="checkbox"/>
Grants	<input type="checkbox"/>	<input type="checkbox"/>
Tax-Preferred or Green bonds	<input type="checkbox"/>	<input type="checkbox"/>
Private activity bonds	<input type="checkbox"/>	<input type="checkbox"/>
Green climate fund	<input type="checkbox"/>	<input type="checkbox"/>
Investment tax credits	<input type="checkbox"/>	<input type="checkbox"/>
Portfolio standards	<input type="checkbox"/>	<input type="checkbox"/>
Preferential dispatch for electricity production	<input type="checkbox"/>	<input type="checkbox"/>
Production tax credits	<input type="checkbox"/>	<input type="checkbox"/>
Public-private partnership	<input type="checkbox"/>	<input type="checkbox"/>
Loan guarantees	<input type="checkbox"/>	<input type="checkbox"/>

What is the most important enabler of planning a large scale CCS project?

- Access to direct subsidies
- Access to viable CO₂ storage
- Off-take arrangements offering guaranteed prices
- Other (please indicate below)

Section 2: CCS questions

Below is a list of possible CCS project Challenges. Please Rank issues by least severe (1) to most severe (5).

	Least Severe	Most Severe
Pipeline safety	<input type="range"/>	<input type="range"/>
Short-term storage liability	<input type="range"/>	<input type="range"/>
Long-term storage liability	<input type="range"/>	<input type="range"/>
Balanced financial security for projects	<input type="range"/>	<input type="range"/>
Siting issues	<input type="range"/>	<input type="range"/>
Onsite liability of CCS technology	<input type="range"/>	<input type="range"/>

Carbon removal in the context of climate mitigation is increasingly seen in a favorable, or at least pragmatic, light. However CCS is still consistently represented in the public and news articles in a laconic, often superficial, negative perspective. What do you believe is the best way to change this commentary?

- Change our communication style to be more assessable
- Promote CCS success stories
- Push for more projects
- Draw attention to learning curves and true costs of other clean energy technologies/large infrastructure
- Other (please indicate below)

Section 2: CCS questions

Please rank which communities are the most important to engage from least important (1) to most important (5).

	Least Important	Most Important
Politicians	<input type="range"/>	<input type="range"/>
Environmental NGOs	<input type="range"/>	<input type="range"/>
NGOs like associations and trade groups	<input type="range"/>	<input type="range"/>
Financial institutions like World bank	<input type="range"/>	<input type="range"/>
Growing counties with fledgling CCS industry i.e. China, India	<input type="range"/>	<input type="range"/>
Academic groups	<input type="range"/>	<input type="range"/>

Next

Section 3: Participant questions

Please select your regional affiliation:

- Americas (Brazil, Canada, Mexico, USA)
- Europe (EC, France, Germany, Greece, Italy, Netherlands, Norway, Poland, Romania, Serbia, UK)
- Asia/Pacific (Australia, China, India, Japan, South Korea, New Zealand, Russia)
- Middle East/Africa (Saudi Arabia, South Africa, UAE)

What is the best CCS-focused/CCS-affiliated event in your region? Please type your response in the text box below.

Please provide any additional input regarding the CSLF in the text box below.

Section 3: Participant questions

What best describes your organization?

- Government Agency
 - University
 - Research Facility
 - Environmental Non-government Organization
 - Non-government Organization
 - Think Tank
 - Private Industry
 - Membership Association
-

How many years have you been involved in the CCS industry?

Optional Contact Information

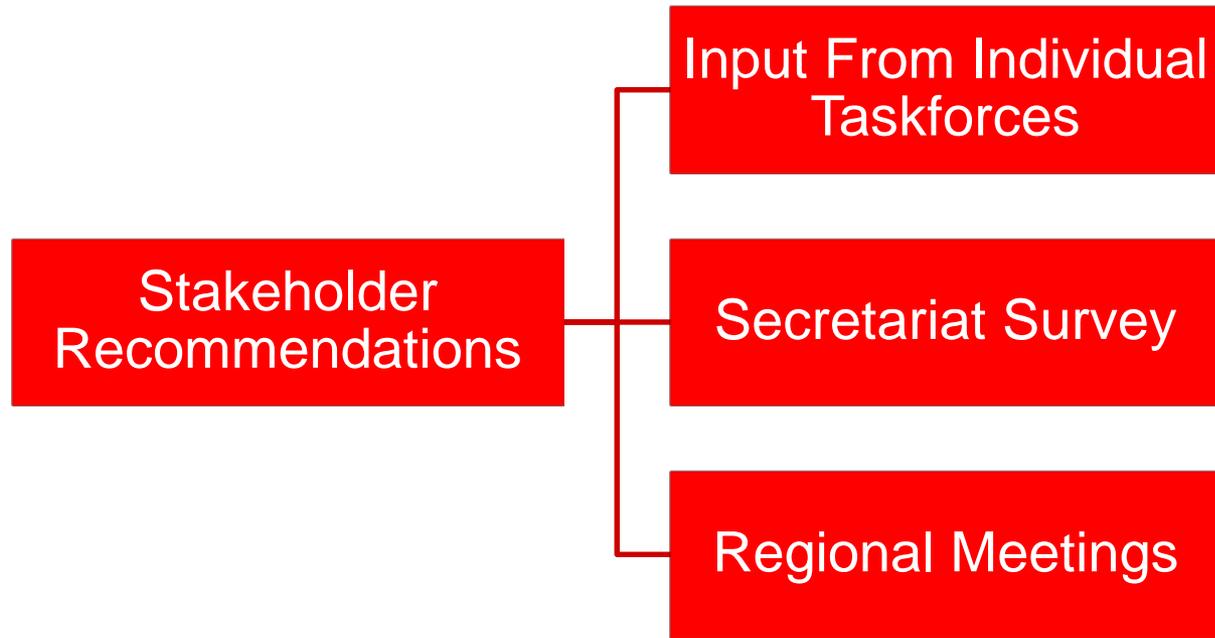
First Name :

Last Name :

Phone :

Email Address :

Conclusion



- Information from taskforces, the secretariat survey, and written statements from regional meetings will be synthesized by all four champions into a set of recommendations to be delivered at the ministerial meetings.