

The background of the slide features a large offshore oil rig in the center, with several wind turbines visible in the distance. The scene is set against a sunset sky with warm orange and yellow hues. A large, semi-transparent white arc is overlaid on the right side of the image.

TOGETHER, MAINSTAY ALTERNATIVE LOWER CARBON ENERGY STARTS HERE.

2022 ANNUAL REPORT



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The background of the slide is an aerial photograph of a dense evergreen forest. A paved road winds through the trees. A large, semi-transparent white arc is overlaid on the right side of the image. The text is overlaid on the left side of the image.

TOGETHER, MAINSTAY ALTERNATIVE LOWER CARBON **ENERGY STARTS HERE.**

2022 ANNUAL REPORT

TOGETHER, ENERGY STARTS HERE.

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Chairman's Message

I am honored to serve as EnerGeo Alliance's Chairman of the Board, especially at a time of transformation for both the energy geoscience industry and the Alliance. Over the past 51 years, EnerGeo has proven to be an indispensable business partner for member companies that are facing greater performance expectations and accountability at the highest level to provide increasing access to energy more efficiently and more safely than ever before. As the backbone of the entire energy industry, we consistently deliver industry-leading results—and so does our Alliance.

2022 marked the beginning of our new journey under our new name, EnerGeo, which is an excellent description for our Alliance and our work as an industry. We are at the heart of the work that enables the safe and sustainable discovery, development, and delivery of countless mainstay energy sources, like petroleum and natural gas, and the lower carbon energy solutions such as offshore and onshore wind, and carbon capture and sequestration to drive the world's human advancement.

As our critical business partner, the EnerGeo Alliance has been on the forefront as the flagship alliance of the energy geoscience industry and much-needed voice of the industry, as well as the industry-wide standard bearer. From governments to treaty organizations, science to HSE & Sustainability, EnerGeo provides members the resources we need to accelerate our own business opportunities and ensure a healthy competitive energy geoscience industry. Together, Energy Starts Here®.

We are at the heart of the work that enables the **safe and sustainable discovery, development, and delivery** of countless mainstay energy sources, like petroleum and natural gas, and lower carbon energy solutions such as offshore and onshore wind, and carbon capture and sequestration to **drive the world's human advancement.**





Navigating a Rapidly Evolving Industry

EnerGeo is the industry's champion and leader in navigating the rapidly changing energy industry and the policies that come with it. As the pace of change continues to accelerate, EnerGeo demonstrates its ability to adapt and be proactive in enhancing the effectiveness of our industry advocacy and establishing consistent positions on emerging policies and issues using credible science as its foundation.

Our Alliance is well-known and well-respected around the world. The Alliance partners with countries to help them understand the science-based policy and regulatory frameworks needed to attract and maintain the investment of our members to deliver cutting-edge data that can unlock their resource potential wherever they are on the energy evolution scale. EnerGeo also fosters engagement and alignment with regional and alternative energy trades around the world, bringing key players into our arena as we tackle the largest challenges in the evolution of the energy industry, and promotes the best performance in health, sustainability, and the environment, while providing industry solutions for efficiency in contracting and operations. EnerGeo walks in step with our industry's executive leadership to ensure it provides business-critical relevant content, initiatives, and research.

The energy geoscience industry should never underestimate the part we play in building a better more sustainable world by enabling the energy the world needs.

A Word of Thanks

I'd like to thank Nikki Martin and the entire EnerGeo Alliance team for the commitment and dedication to this industry and their work as our voice and trusted partner in bringing new energy to the world. And never has their efforts shined brighter than in 2022. You'll get a glimpse of just a few of the successes of EnerGeo Alliance in this year's Annual Report.

Kristian Johansen
CEO, TGS
EnerGeo Alliance Chairman

President's Message

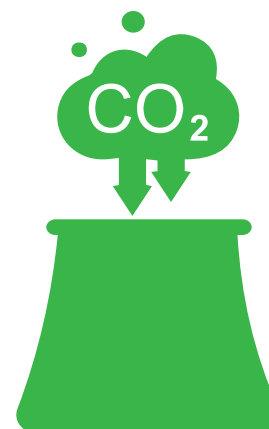
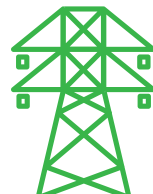
2022 was a momentous year as we underwent a rebrand and embarked upon our new journey as the EnerGeo Alliance. On 18 January 2022, we proudly announced our name change to the EnerGeo Alliance to accurately reflect our membership and the work we do together. Our name, "EnerGeo," is from the Greek lexicon meaning "to be operative, at work, put forth power for one, aid one; to effect; to display one's activity." Effectively, it means: To put forth energy. To be at work. To produce results. And every day, that is exactly what our members do for society and what our Alliance achieves together.

Together, Energy Starts Here®. And together, we are leading the energy evolution.

Our industry not only sits at the intersection of where energy and geoscience meet, but we are also a long-standing partner in reducing the environmental and carbon footprint of energy exploration while accelerating discoveries and energy development. At this critical time in history, with energy at the forefront of political and societal discussions around the world, our story as an industry is a remarkable one that needs to be told more broadly. EnerGeo Alliance is well-positioned to do this like never before.

As in the past, the innovation needed to lead the evolution truly starts with us—from mainstay energy sources such as petroleum and natural gas to alternative energy and low-carbon energy solutions such as offshore and onshore wind, geothermal, and carbon capture and storage. Our industry is not just a critical partner, it all starts here. And together, through the Alliance, we are stronger than the sum of our parts. Together, we are able to "put forth power," to set into motion, and affect results that are "superhuman," and unachievable in our own individual strength.

Our industry not only sits at the **intersection of where energy and geoscience meet**, but we are also a long-standing partner in reducing the environmental and carbon footprint of energy exploration while **accelerating discoveries and energy development**.





Our industry sits at the intersection of energy and earth science, and as such we are pro-energy and pro-environment. Around the globe, EnerGeo Alliance tells the story of the industry's role as a long-standing partner in reducing the environmental and carbon footprint of energy exploration while accelerating discoveries and energy development. Positioned as the EnerGeo Alliance, in 2022 we were able to do that like never before. We continuously work to develop and promote informed policies and industry best practices that advance responsible energy discovery, development, and delivery, in the midst of the energy evolution.

The EnerGeo Alliance now fully stands as the energy geoscience industry's flagship organization. During a time of rapid energy evolution with energy demand increasing and government regulation becoming more stringent, our members' work matters and EnerGeo Alliance's work matters. The priority for our organization and key tenet of our Strategic Plan continues to be advocating for the industry's freedom to operate around the world.

As the global energy demand evolves, we believe that all policy makers—and energy companies—providing mainstay, alternative, and low-carbon solutions should have access to reliable data and analysis to support their forward-moving efforts. In 2022, EnerGeo captured new opportunities to tell the energy geoscience industry's story about the irreplaceable role and our work in responding to the world's growing energy needs and its goals for a lower carbon energy future. The world cannot and will not meet its carbon reduction goals without us. The energy geoscience industry is innovating and doing even more to ensure cleaner, affordable, and reliable energy and low-carbon solutions that sustain and lift the world out of poverty.

Priority Areas for 2023

As we enter 2023, we will continue to work with our members as your strategic business partner, building upon our strong foundation of increasing our impact, expanding our reach, and maximizing our effectiveness to support your operations. As part of taking advantage of strengths and opportunities, we have some new and exciting things launching in 2023. This includes a strategic communications initiative that will broadcast the irreplaceable value of our industry and pursuit of new programs to increase our understanding of, and our positive contribution to, the environment in which we work.

Our 2022 Annual Report highlights some of our most significant successes and projects. We remain committed to our Strategic Plan which articulates the work that is most critical to our industry and that continues to deliver results for our members as we continue to lead the way together in a rapidly changing energy industry. Together, Energy Starts Here®.

Nikki C. Martin
EnerGeo Alliance
President

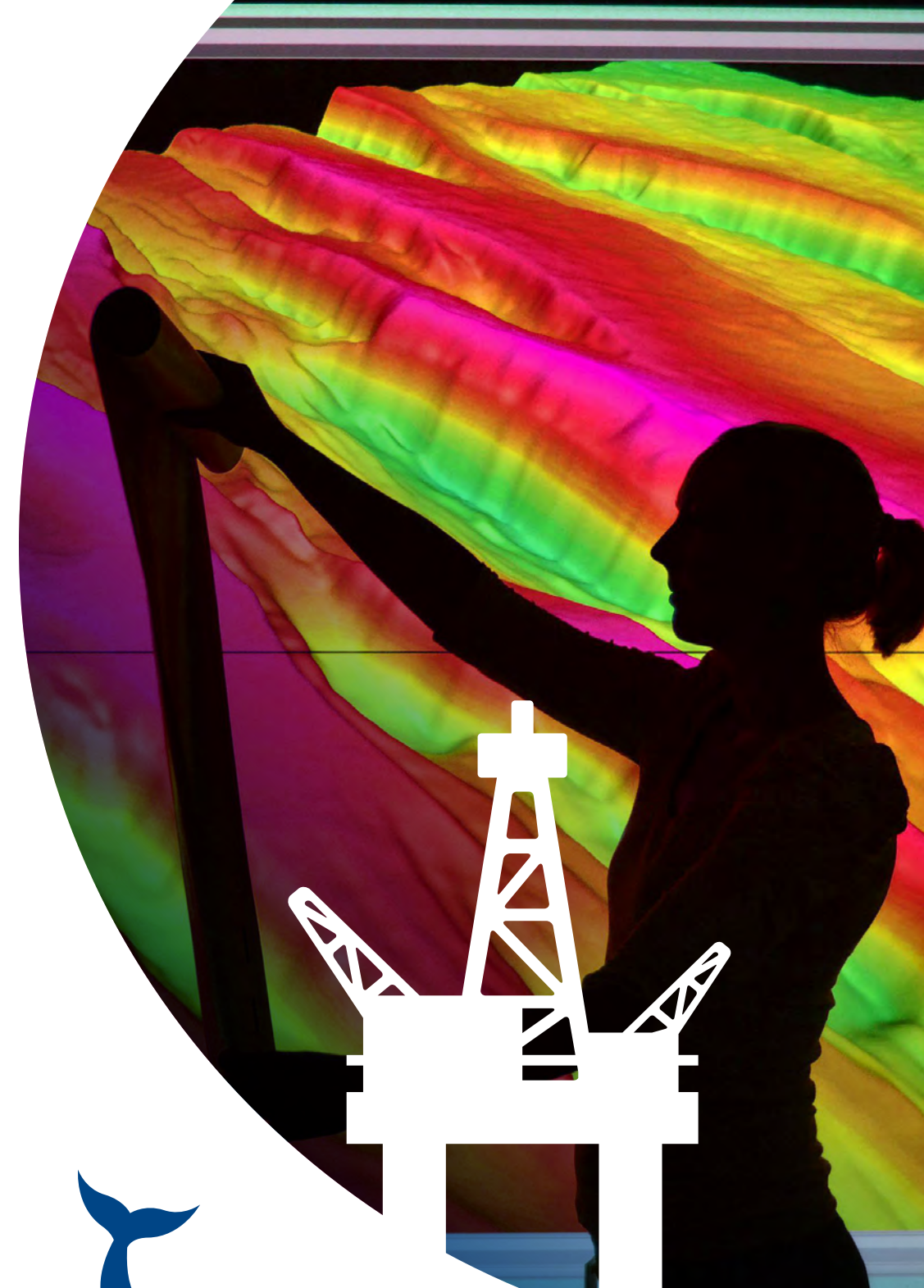
About the EnerGeo Alliance

Founded in 1971, the EnerGeo Alliance is the global trade alliance for the energy geoscience industry, the intersection where earth science and energy meet. We represent the geoscience companies, innovators, and energy developers that use earth science to discover, develop, and deliver energy to our world. Together, Energy Starts Here®.

Providing solutions to revolutionize the energy evolution, the EnerGeo Alliance and its member companies span more than 50 countries, representing onshore and offshore geoscience companies, energy data and processing providers, energy companies, equipment and software manufacturers, industry suppliers, service providers, and consultancies. Together, our member companies unify to open the gateway to the safe discovery, development, and delivery of mainstay sources of energy, alternative energy, and low-carbon energy solutions that meet our growing world's needs.

Through reliable science- and data-based regulatory advocacy, credible resources and expertise, and future-focused leadership, the EnerGeo Alliance serves as the voice of the global energy geoscience industry. We are dedicated to providing our members relevant and timely topical events, seminars, and news, as well as educational, scientific, and regulatory tools and information to help enable the exploration and development of mainstay, alternative, and low-carbon energy solutions.

Together, our member companies unify to open the gateway to the safe discovery, development, and delivery of mainstay sources of energy, alternative energy, and low-carbon energy solutions that **meet our growing world's needs.**



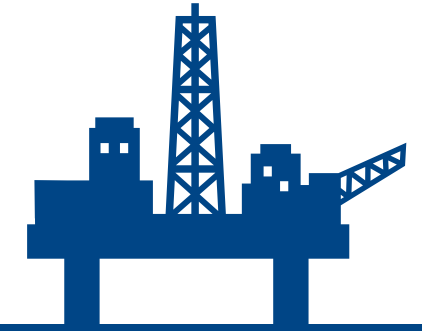
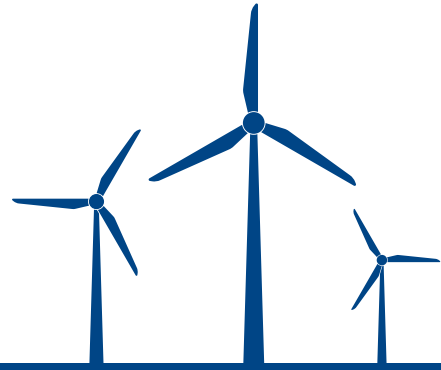


2022 Board of Directors

The EnerGeo Alliance Board of Directors is responsible for steering the EnerGeo Alliance towards a sustainable future. Under the direction of the Board of Directors, the EnerGeo Alliance staff is a well-seasoned team that brings a wealth of experience from a diversity of backgrounds.

Name	Company	Position
Kristian Johansen	TGS	Chairman
Carel Hooijkaas	Magseis Fairfield	Vice Chair
Hao Huimin	BGP Inc., CNCP	Member
Dechun Lin	CGG	Member
Joe Dryer	Fairfield Geotechnologies	Member
Rune Olav Pedersen	PGS	Member
Duncan Eley	PXGEO	Member
Forrest Burkholder	SAExploration	Member
Andrea Lovatini	SLB	Member
Irene Waage Basili	Shearwater	Member
Rebecca Pitman	Shearwater	Treasurer
Tana Pool	TGS	Secretary, Legal Chair
Shawn Rice	Magseis Fairfield	Americas Chair
Tom Kipling	TGS	Asia Pacific Chair
Peter Wijnen	PGS	EAME Chair
Vince Thielen	CGG	GDLC Chair
Graeham Mackenzie	CGG	HSSE Chair
Nikki Martin	EnerGeo Alliance	President

Staff



Nikki C. Martin
EnerGeo Alliance
President



Gail Adams
VP of Communications &
External Affairs



Dustin Van Liew
VP of Global Policy &
Government Affairs



Criss Rennie White
VP of Business
Operations



Dr. Alex Loureiro
Scientific Director



Jameson White
Director of Membership
& Committees



Faisal Diab
Director of Global Policy
& Government Affairs



Shawn M. Rice
Director of Business
Development & Strategy



Rochelle Booker
Director of Marketing
Communications

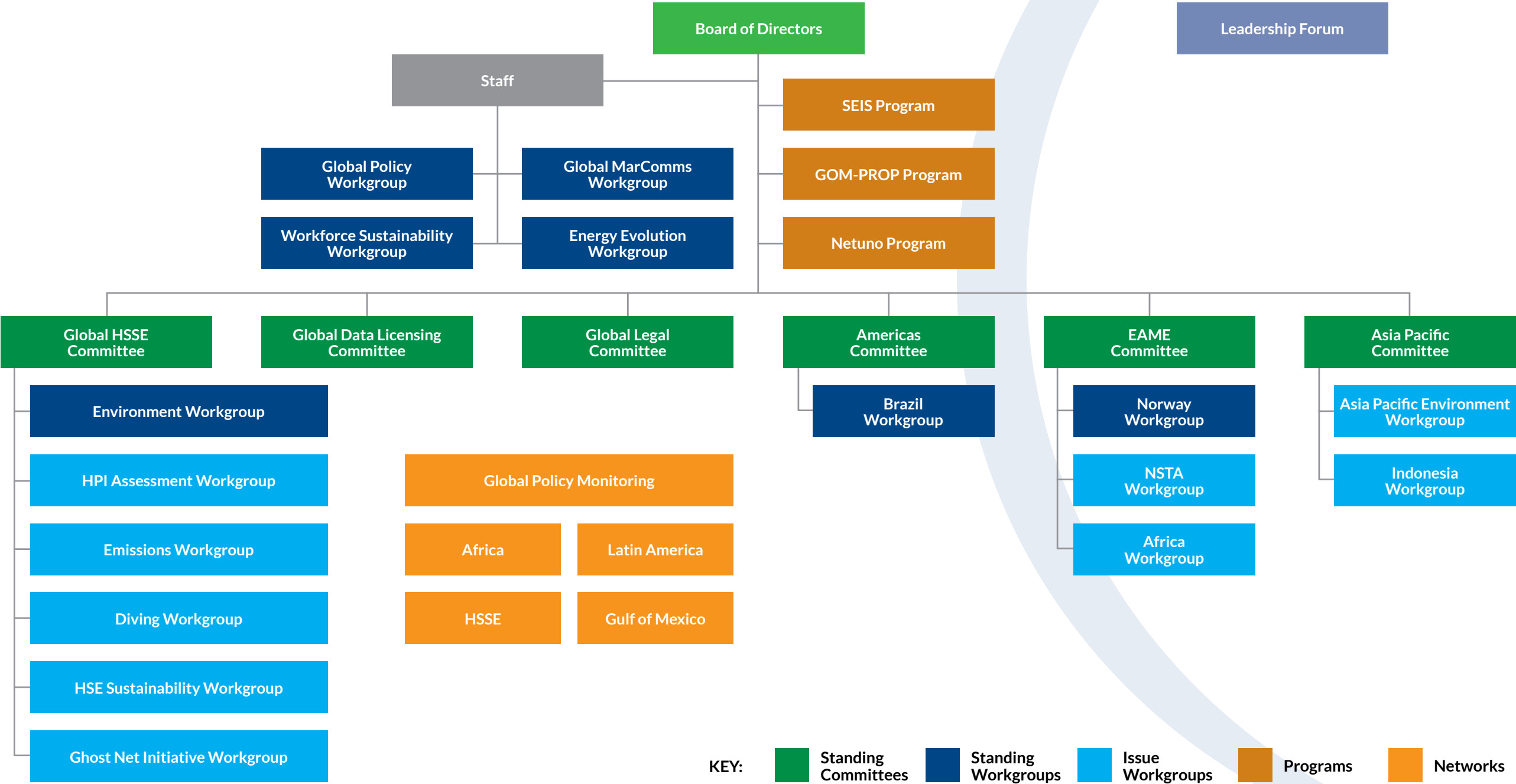


Rose Ingrande
Manager of Programs &
Operations



Mabel Smetters
Manager of Executive
Operations

Organizational Structure





Committees and Workgroups

Global Data Licensing Committee

Provides input and guidance on EnerGeo Alliance recommendations and policy positions on data licensing issues impacting the multi-client energy geoscience industry and informs EnerGeo Alliance's regulatory engagement and educational efforts with government, energy industry, and other stakeholders across the EnerGeo Alliance regions (Americas, EAME, Asia Pacific) on these issues.

Global Legal Committee

Provides recommendations and oversight for legal actions in response to final regulatory initiatives and other issues, as needed, and provides broad input and advice on issues and projects with legal implications, including review and update of EnerGeo Alliance's anti-trust and competition policies.

Global HSSE Committee

Provides input and guidance on EnerGeo's positions and strategies regarding health, safety, security, and environment issues (HSSE) impacting the energy geoscience industry, identifies and promotes the use of best practices, and establishes HSSE standards and guidelines for the EnerGeo Alliance.

Americas Committee

Provides input and direction to EnerGeo regarding key priorities in region, supports the EnerGeo Alliance's monitoring and engagement of emerging issues within the Americas that may impact the industry's freedom to operate, and creates and directs workgroups that address specific active issues in North and South American continent countries to ensure consistency on overarching goals and objectives of the EnerGeo Alliance.

Asia Pacific Committee

Provides input and direction to EnerGeo regarding key priorities in region, supports the Alliance's monitoring and engagement of emerging issues within the Asia Pacific Region that may impact the industry's freedom to operate, and creates and directs workgroups that address specific active issues in Asia Pacific countries to ensure consistency on overarching goals and objectives of the EnerGeo Alliance.

EAME Committee

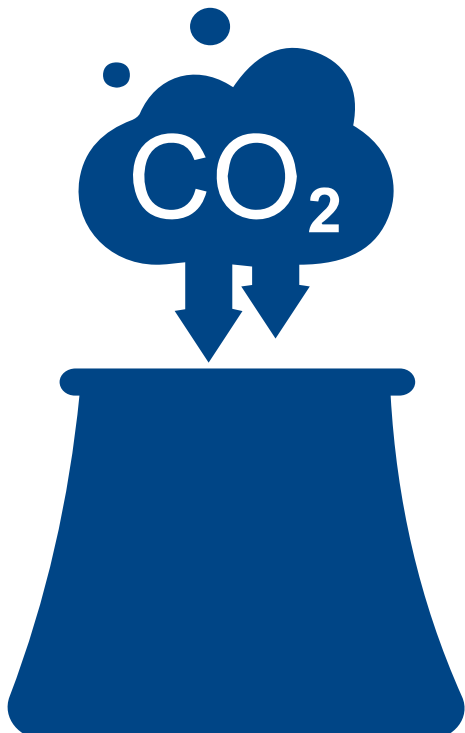
Provides input and direction to EnerGeo regarding key priorities in region, supports the Alliance's monitoring and engagement of emerging issues within the Europe, Africa, Middle East (EAME) region that may impact the industry's freedom to operate, and creates and directs workgroups that address specific active issues in EAME countries to ensure consistency on overarching goals and objectives of the EnerGeo Alliance.

EnerGeo Alliance Standing Workgroups

EnerGeo's Standing Committees have Standing Workgroups to ensure timely engagement and response to issues.

EnerGeo Alliance Issues Workgroups

EnerGeo Alliance Issues Workgroups convene to address specific energy geoscience industry issues to achieve a goal as outlined by the respective group and within the scope and mission of the EnerGeo Alliance.



2022 EnerGeo Alliance Membership

Governing Members



Industry Partners



Contributing Members



Associate Members



Professional Services



Membership Categories

Value Starts with Membership – As an essential business partner, EnerGeo offers its members a variety of benefits and resources that enhance business operation efficiencies and environmental compliance. Membership also provides the opportunity to shape EnerGeo’s priorities and give input on industry positions around the globe.

Governing

Energy geoscience data acquisition contractor; data processing contractor; owner and supplier of multi-client energy geoscience data for license; energy geoscience service provider; or equipment supplier/manufacturer. Governing Members maintain the highest level of access and benefit within the Alliance, having a seat on our Board of Directors, voting privileges, and access to the Global Leadership Forums.

Industry Partner

A non-geoscience company that has interest in supporting the mission and objectives of the Alliance, but does not otherwise qualify for membership, including exploration & production and energy companies.

Allied Partner

An energy company with a majority business interest in wind, solar, or other alternative energy sources, or a company with a business interest in decarbonization, that supports the mission and vision of the Alliance.

Contributing

Any company that meets the Governing Member definition but declines participation as a Governing Member.

Associate

Any company that provides products and/or services to the energy geoscience or energy industry or is an academic institution.

Professional Services

Any company that provides professional services to the energy geoscience or energy industry. These professional services can be investor services, law firms, research firms, etc. A company that qualifies for another membership class does not qualify for the Professional Services class.



\$3,395,767

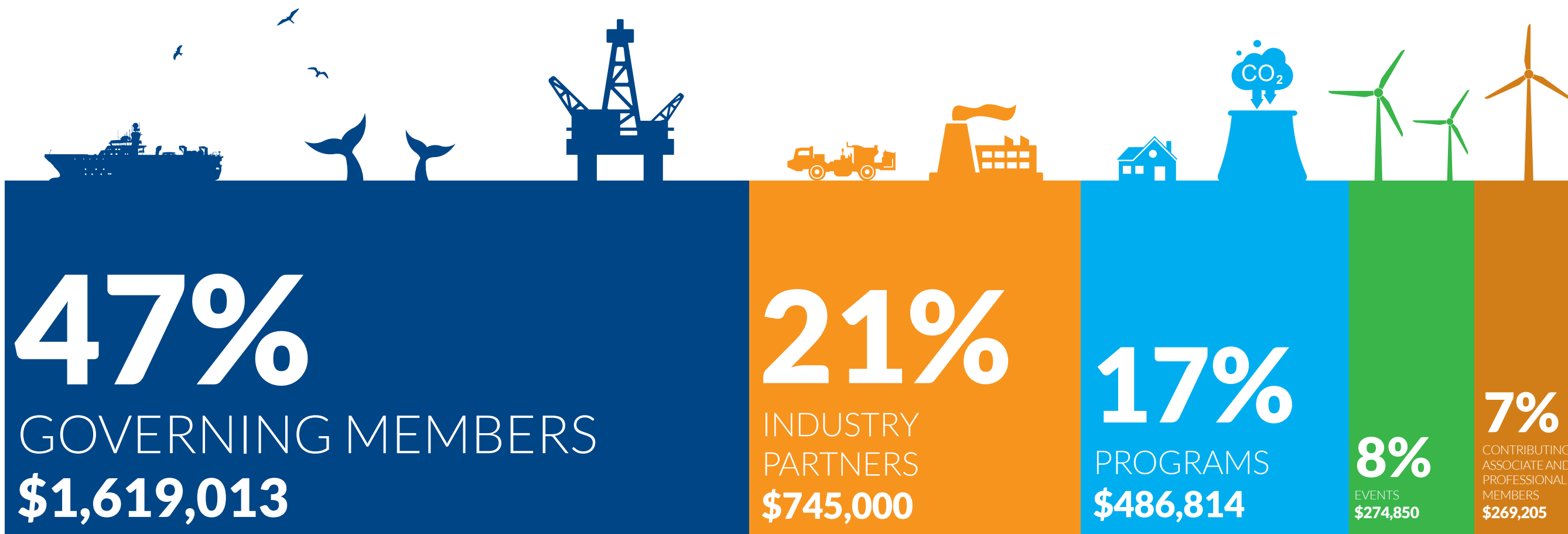
2022 Budget and Revenue



Global Regulatory,
Scientific, Legal,
Communications
Engagement

742%

Programs Leveraged
Members Dues and
Increased 742%
Over 2021



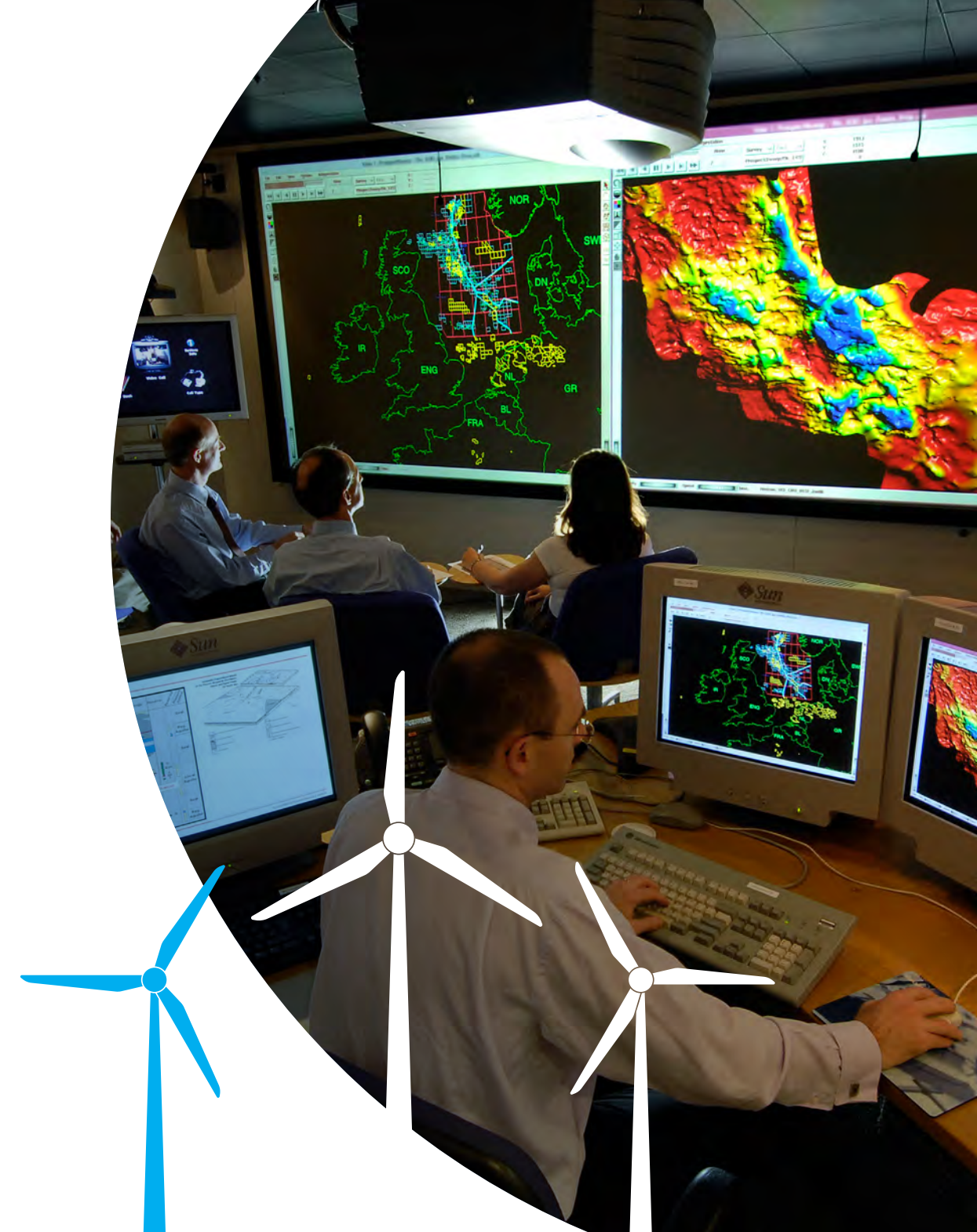
Together, Energy Starts Here: Evolving and Expanding for New Energy Solutions

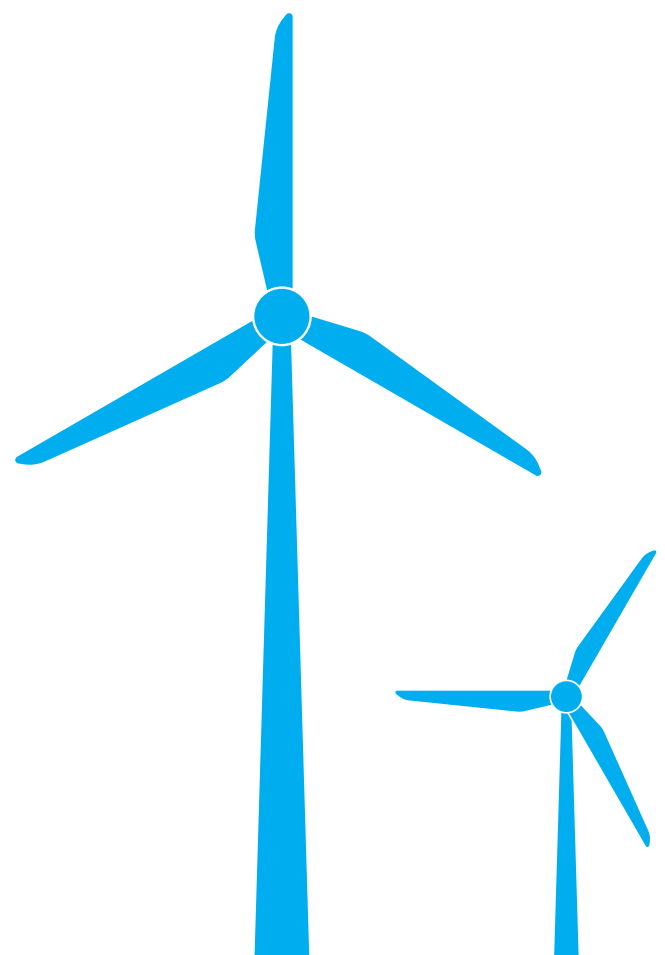
EnerGeo is investing internal resources to meet members' Energy Evolution needs and expanded membership to ensure coverage and application of our proven engagement framework to new energy and lower carbon solutions.

As the definition of "energy resources" has continued to grow and expand, EnerGeo members and Industry Partners indicated an interest and intent to expand operations into alternative energy areas. As a business partner, we have expanded right along with them. From mainstay energy sources such as petroleum and natural gas and alternative sources such as offshore wind and geothermal to lower carbon solutions such as carbon capture and storage, the EnerGeo Alliance supports members, whatever their approach to the energy evolution.

New and alternative energy companies are now benefiting from EnerGeo's 50+ years of science-backed expertise and advocacy as well as the energy geoscience industry's lessons learned, track record of environmental and regulatory compliance, and methods of reducing the environmental footprint. EnerGeo Alliance's resources are business relevant and technical, focusing on issues that are most important to members.

New and alternative energy companies are now benefiting from **EnerGeo's 50+ years of science-backed expertise and advocacy** and the energy geoscience industry's lessons learned.





EnerGeo Alliance interacts and engages with governments and partners across the world—all very different and unique. We use this advantage and leverage interest from these countries and their varying perspectives to expand the Alliance's engagement efforts to include alternative energies and lower carbon solutions.

- Held regular meetings with regional trade associations (examples: CCSA and WindEurope).
- Submitted comment letters on wind development in U.S. Gulf of Mexico and Pacific and Atlantic outer continental shelf.
- Submitted comment letters on offshore wind in the U.S.
- Participated at the UN Oceans Conference.
- Submitted feedback to regulators in Brazil on CCS.
- Engaged U.K., Brazil, U.S., Greece on development of CCUS regulations.
- Attended the American Clean Power Association Offshore WINDPOWER conference.

- Sponsored the NOIA/OOC CCUS Symposium and presented on a panel.
- Singapore: Held a virtual meeting with the Energy Market Authority of Singapore to understand support they might require from EnerGeo and members as they assess the geothermal potential in Singapore.
- Developed and published public and member resources:
 - > U.S. and States CCS Overview
 - > U.K. and Norway CCS Overview
 - > Australia CCUS Regulatory Overview
- [Geothermal Fact Sheet](#)
- [Offshore Wind Fact Sheet](#)
- [The Importance of Geophysical Data for Carbon Management](#)
- [Guidance for Estimating and Reporting Greenhouse Gas \(GHG\) Emissions for Marine Geoscience Activities](#)



Geoscience data is critical to sustainable energy development.

EnerGeo works with governments to develop frameworks to support obtaining the data they need to understand the resource potential within their borders for their unique needs in the energy evolution, whether it's evolving from coal to natural gas or adding onshore and offshore wind, geothermal energy, and carbon capture and storage.



FREEDOM TO OPERATE

Freedom to Operate

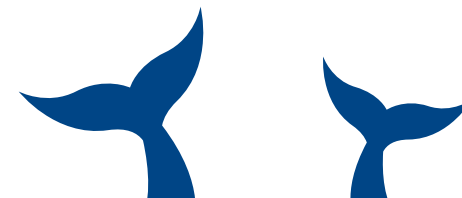
We Relentlessly Pursue Your Freedom to Operate – Whether it is mainstay or alternative energy sources or lower carbon energy solutions, the primary objective of the EnerGeo Alliance and a key tenet of our strategic framework is to apply our formidable resources, knowledge, and energy to fight for your access and freedom to operate.

Government and Regulatory Engagement Highlights

EnerGeo Alliance engages directly with regulators around the world. Wherever the energy geoscience industry and our members are operating, you can be assured that we are maximizing our advocacy opportunities and advancing members' visibility and interests.

Key Successes Around the Globe

1. United Nations: Committee on NGOs (non-governmental organizations) recommends EnerGeo receive Economic and Social Council Special Consultative Status.
2. The EnerGeo Alliance has been granted accreditation to the United Nations Environment Assembly (UNEA) with the United Nations Environment Programme.
3. EnerGeo was granted consultative status to the United Nations Economic and Social Council (ECOSOC).
4. Represented the energy geoscience industry at the UN Oceans Conference, the first major in-person event of relevance since achieving consultative status to the ECOSOC.
5. Presented EnerGeo's EIA Handbook to the International Offshore Petroleum Environment Regulators (IOPER).





Regional Accomplishments

Africa

- South Africa
 - > EnerGeo has built credibility in South Africa, increasing partnerships with Petroleum Agency of South Africa (PASA) and Good Governance Africa (GGA) and outreach to key stakeholders including the African Energy Chamber, South Africa Oil & Gas Alliance (SAOGA), South African United Fishing Front (SAUFF), and Southern African Foundation for the Conservation of Coastal Birds (SANCCOB) to counter misinformation with credible scientific analysis and information to support members' freedom to operate offshore South Africa in midst of environmental activists' public and legal campaigns.
- Formed new partnerships with the Petroleum Agency of South Africa.
- Presentations by Dr. Alex Loureiro and EAME Committee Chair Peter Wijnen at PASA's 2nd Pre-Colloquium.
- Several virtual and in-person meetings with PASA at AOW and AEW.
- Met with PASA Petroleum Minister Mantashe at AEW.
- Presented EnerGeo's EIA Handbook to PASA officials.
- Published response to South Africa's Strategic Advisory Group on Emergencies (SAGE) regarding offshore seismic surveys.
- Provided materials and support for PASA engagement events.
- Submitted a letter to the South African President highlighting importance of seismic surveys to South Africa and permitting issues.
- Submitted expert declarations supporting several members' activities under legal review.

- Provided subject matter expert briefs in two legal matters, enhancing member arguments in support of seismic surveys offshore.
- Completed regulatory review and risk profile analysis for South Africa and Namibia, enhancing industry knowledge for developing engagement efforts.
- Niger
 - > EnerGeo hosted, alongside AEC, the President, and Petroleum Minister of the Republic of Niger in Houston.
- Namibia
 - > Met with Namibian Petroleum Commissioner.

Brazil

- EnerGeo secured new confidentiality extension terms issued by ANP. With the final resolution providing 30-year confidentiality terms for multiclient data in areas of interest and 15 years for the remaining areas.
- The Brazilian Institute of Environment and Renewable Natural Resources (IBAMA) officials and head of permitting attended EnerGeo's workshop, "Multiple seismic activities: sound impact and permitting" and supported a presentation Round Table at the SBGF Congress to explore potential solutions to permitting challenges.
- EnerGeo played an integral role in a workshop series coordinated by the Mines and Energy Ministry and Environmental Ministry via invitation from the Energy Research Agency (EPE). The Alliance submitted detailed recommendations on regulatory efficiencies, the basis of continued industry efforts in Brazil in 2023.
- EnerGeo partnered with the Blue Amazon Network, a group of academic professors in Brazil who want to ensure local universities' expertise in North Brazil and Equatorial Margin are considered in government assessments and decisions for bid rounds.



Brazil: EnerGeo secured key new confidentiality extension terms issued by ANP

30 year confidentiality terms for multiclient data in areas of interest

15 years for the remaining areas



Australia

- Presented EnerGeo's EIA Handbook to officials in Australia.
- After EnerGeo engagement, Australia's DISER/Department of Agriculture, Water and the Environment (DAWE) Policy Framework proposed a voluntary guidance framework, declining to implement prescriptive top-down requirements for the energy industry.
- Facilitated collaboration between APPEA (Australian Petroleum Industry peak body) and NOPSEMA (Environment Regulator), Department of Industry/ Department of Agriculture, Water and the Environment (DAWE) on fishery engagement, Marine Noise guidelines, Data Regulation and Release, and regulatory inspection.

Greece

- Presented EnerGeo's EIA Handbook to the environmental attaché to the EU.
- Developed strategy to engage with the country's regulators on the multi-client model based upon our successful model implemented in Indonesia.

Latin and South America

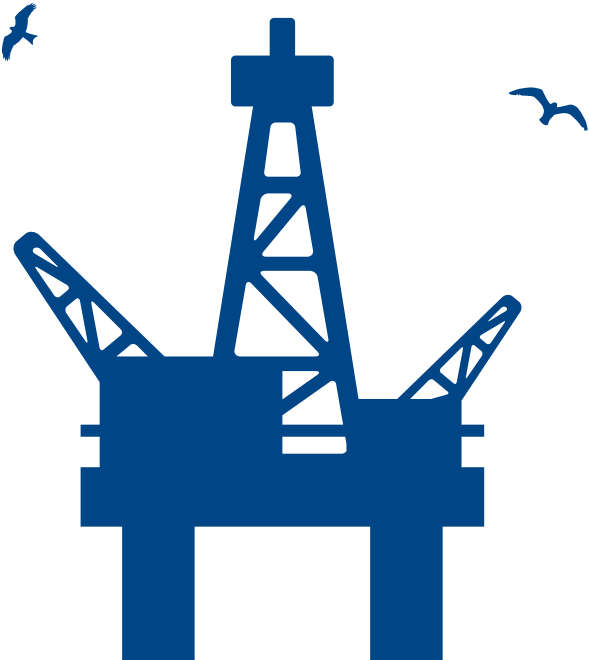
- Beyond Brazil, EnerGeo is increasing its government and regulatory engagement throughout Latin and South America, including in Argentina, Uruguay, Guyana, Suriname, and more.

Norway

- Participation in NPD workshops regarding Diskos 2.0 and issues surrounding entitlements, etc.
- Participation in NPD workshop regarding the adoption of r2.0 of the SEG-Y standard for reporting data to the NPD.
- With NOROG, attended meeting with Norwegian Environment Agency (Miljødirektoratet – MDIR) regarding the likely introduction of marine mammal observers and associated protocols for seismic surveys offshore Norway.
- Members presented at Fish and Seismic workshop.

United Kingdom

- Submitted consultation response regarding the Scottish Offshore Wind Sectoral Marine Plan Consultation.
- Submitted consultation response regarding the U.K. Marine Strategy Part 3.
- Submitted consultation responses regarding the initial scoping and subsequent Environmental Report of the Offshore Energies Strategic Environmental Assessment (OESEA) 4.
- Submitted consultation response regarding the U.K. Climate Compatibility Checkpoint for future oil and gas licensing.
- Submitted comments to Parliamentary Select Committee on Environment, Food, and Rural Affairs regarding a call for evidence about marine mammals.
- Submitted consultation response regarding the proposed designation of Highly Protected Marine Areas (HPMA) within U.K. waters.
- Submitted comment letter to HMRC regarding the Energy (Oil & Gas) Profits Levy to clarify the inclusion of seismic data and acquisition under the relevant allowance.
- Participated in Offshore Energies U.K. (OEUK) Exploration Conference, including a presentation by EnerGeo and a panel session featuring a member representative.
- Participated in the introductory workshop of the DEFRA-led U.K. Marine Spatial Prioritization Programme.
- Coordinated presentation on sub-bottom profilers to JNCC.
- Presented to the U.K. Underwater Noise Strategic Advice Group (SAG) on timeshare as an example of how the geoscience industry addresses issues related to concurrent operations.
- Presented EIA Handbook to U.K. officials.
- Supported member engagement with the U.K. North Sea Transition Authority (NSTA) regarding data disclosure rules.





United States

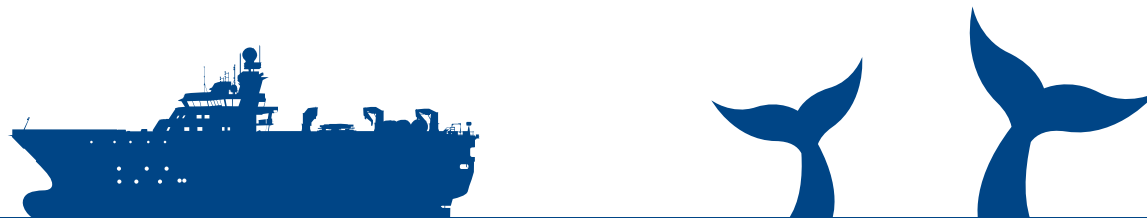
- Gulf of Mexico

- > EnerGeo's continued efforts with Congress and the regulator led to NMFS issuing a revised GOM ITR that aims to fix LOA delays in early January 2023.
- > EnerGeo led and co-sponsored several joint webinars and information sessions regarding Incidental Take Regulation (ITR) implementation, Letters of Authorization (LOAs) requests, and other general concerns regarding regulatory changes.
- > EnerGeo filed an amicus brief focused on the harm caused by vacating the lease sale that had already announced high bids but where awards had not been provided.
- > EnerGeo's priority legislation to fix the current Letter of Authorization (LOA) backlog issue in the Gulf of Mexico (GOM) was introduced in the U.S. House of Representatives by Congressman Garret Graves (Louisiana) as a part of a broader energy package and subsequently introduced by the House Natural Resources Committee Ranking Member, Congressmen Bruce Westerman (Arkansas).

- > EnerGeo continues extensive engagement in Washington, D.C., working with Congress to develop legislative fixes for short-term and immediate resolution to existing permitting delays stemming from the Marine Mammal Protection Act, while maintaining pursuance of the statute's modernization.
- > In 2022, EnerGeo actively engaged in five lawsuits to defend industry's access to acreage and geoscience data acquisition in the U.S. Gulf of Mexico.

- EnerGeo teamed up with six associations to remove a proposed amendment from H.R. 6728 and S. 3705 that would have restricted foreign-flagged vessels that work on offshore energy projects on the OCS, disrupting critical domestic offshore oil and natural gas operations and halting offshore renewable energy developments. **The success of having this language removed potentially saved the industry an average of:**

\$15.2B in capital investment and spending,
137,432 jobs, **2,654MW** of offshore wind
generation capacity, and an average each year
from 2022-2030 of **.60 MMBOED** of oil
and natural gas production.



EnerGeo's priority legislation to fix the current Letter of Authorization (LOA) backlog issue in the Gulf of Mexico (GOM) was introduced in the U.S. House of Representatives by Congressman Garret Graves (Louisiana) as a part of a broader energy package and subsequently introduced by the House Natural Resources Committee Ranking Member, Congressmen Bruce Westerman (Arkansas).



Value-Add

Discover value. One of the greatest value propositions of EnerGeo Alliance membership is the value-add from our government and regulatory efforts, which is viewed as being of the highest value to our members and the industry as a whole. EnerGeo is proactive and implements targeted country outreach and engagement on emerging and current issues. We know that today's policy decisions have lasting impacts on your business for months, if not years, to come. EnerGeo is your global platform for informed engagement, and we are here to ensure your business stability and sustainability.

Our value-add shows EnerGeo's regulatory activities and output and the associated costs that would be expended by a single member if all pursued efforts outside of the EnerGeo Alliance instead of pooling resources towards a common unified goal. The 2022 value-add to industry on policy matters is \$4,987,880.48.





ACCELERATE VALUE CREATION

Accelerate Value Creation

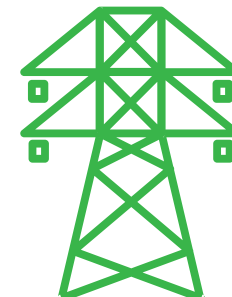
We Proactively Bring Value to Our Members — EnerGeo is a strategic business partner for our members. Recognizing our strengths, our focus is to provide our members with operational excellence that aligns with our Board-set priorities and delivers high-quality products and services, which translate into value creation for our membership. We are the place for advantages, benefits, resources, and opportunities.

Resources

EnerGeo develops resources to support industry engagement on mainstay and alternative energy development policies and lower carbon solutions. Products produced for 2022 include:

- Monitoring of CCUS Regulatory Frameworks – updated member resource, an overview of the tax incentives, environmental, subsurface characterization, monitoring and permanence requirements for CCUS development in the U.S. (Federal, California, and Texas), Norway, and U.K.
- In 2022, EnerGeo continued its monthly Global Policy Monitoring Report, tracking legislative and regulatory developments around the world affecting the industry's current and future access and providing alerts on developing issues that enabled rapid responses, adding value creation opportunities.
- EnerGeo's Global Policy Workgroup began its review of laws and governance structures of countries around the world to gather baseline knowledge of countries' legislative frameworks governing access for petroleum and natural gas exploration.

EnerGeo develops resources to support industry engagement
on mainstay and alternative energy development policies and lower
carbon solutions.





Advancing and Facilitating Credible Science

The EnerGeo Alliance is known for its relentless pursuit of the application of credible science and organizational credibility. Our scientific experts are committed to the standard of truth and objectivity, and hold themselves and others to be guided by data and interpreting those data properly. Our scientific experts conduct presentations and attend key scientific conferences around the world. We have built a reputation for being a credible and reliable source of information. We engage governments and regulatory bodies globally with credible scientific analysis which undergirds and guides our technical and legal analysis and government and regulatory strategy.

Key Successes

- Environmental Impact Assessment (EIA) now available in Spanish.
- EnerGeo presented its EIA to key regulators in priority regions to encourage implementation of its most significant scientific principles, and a consistent credible representation of best available science for evaluating potential industry environmental impact. Revised annually, the handbook is designed to reduce inefficiencies and promote consistency of the application of the best available science in the environmental review and permitting process.

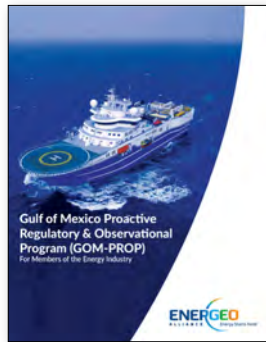
- Published in ECO Magazine, [How industry is Intervening in the Fight Against Marine Debris and Entanglement.](#)
- Continued to work as Co-Chairs of the CMS Industry Advisory Group.
- Attended the UN Oceans Conference.
- Re-drafted a chapter on seismic surveys within the OSPAR publication, inventory of measures to mitigate the emission and environmental impact of underwater noise.
- Developed a partnership with the Gulf Coast Center for Sea Turtle Research at Texas A&M Galveston, where EnerGeo is recognized as a “sea turtle conservation hero.”



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Programs

EnerGeo Alliance's subscriber-based programs increase efficiencies, reduce waste, and provide consistent industry-wide standards and best practices which improve performance while decreasing permitting and compliance costs.



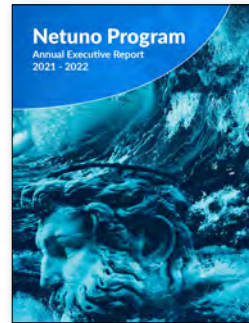
GOM-PROP

This program creates and maintains a long-term, self-sustaining framework to ensure regulatory stability in the U.S. Gulf of Mexico (GOM), based on industry-collected observer data and the best available science, maximizing environmental benefit while minimizing industry burden of compliance so operations can be conducted in a safe and commercially viable manner.

- The EnerGeo-created and-led Gulf of Mexico Proactive Regulatory and Observational Program (GOM-PROP) completed its first year with 21 company participants.
- To date, more than 95% of LOA activity days have been issued to GOM-PROP members.
- GOM-PROP presented its first annual monitoring report to U.S. agencies in Q3 2022.
- Through the GOM-PROP, EnerGeo has begun development of the industry's petition for the next incidental take regulations to ensure regulatory coverage for industry activities in 2025 and beyond.

The EnerGeo-created and-led Gulf of Mexico Proactive Regulatory and Observational Program (GOM-PROP) completed its first year with **21 company participants and issued more than 95% of LOA activity days to its members, to date.**





Netuno

The Netuno Brazilian Environmental Database Program enables compliance with the Brazilian Environmental and Renewable Resources Institute (IBAMA) Terms of Reference (TORs) for offshore seismic surveys in Brazil. Netuno also compiles all data that has been collected since 2005 in a standardized manner (public environmental data submitted as part of the environmental permitting process and respective implemented projects), making it accessible, and transforming it into knowledge for stakeholders.

- The Netuno Program continues to grow in contributions from Brazil geoscience and E&P companies to support permitting and leasing, expanding the database into additional modules and enhancing existing ones. The database enables compliance with IBAMA's TORs requirement for uploading environmental data collected from projects during seismic acquisition implementation and complements EnerGeo's efforts to secure access for energy geoscience activities in country.
- Focused on continuous improvement, Netuno members and IBAMA are working together to broaden Netuno's reach and make it part of the workflows for both parties, industry and government. Planned enhancements for 2023 aim to elevate the database as a management tool, centralizing and making key data available for environmental compliance purposes.



Seismic Efficiency Initiative and Safety (SEIS) Program

The SEIS Program was established to develop specific counsel-approved initiatives and best practices and standards, to promote environmental protection, safety, and efficiency within the geoscience industry. This industry-led effort strives to create efficiency-enhancing initiatives built upon the EnerGeo Alliance's Strategic Framework to accelerate value creation and shorten project cycles by saving the industry tens of thousands of hours over the next decade and allow for more time to be spent on bespoke technological and project-specific solutions.

- 17 participants: 10 Governing Members, 7 Industry Partners.
- Member companies continue to review and report on the successful implementation of EnerGeo's Risk-Based Auditing Guidance.
- EnerGeo published its 2021 HSE Performance Data & Statistics Report in early 2022, utilizing the new HSSE statistics database including dynamic drill-down functionality to analyze trends and root causes for incidents throughout the energy geoscience industry. This functionality has not been available previously with the EnerGeo statistics.
- In 2022, the Standardized HSSE Specifications Workgroup continued development of an industry standardized pre-qualification and call-for-tender questionnaire.



Seismic Efficiency Initiative and Safety (SEIS) Program

10

Governing Members

7

Industry Partners



INDUSTRY ALIGNMENT

Industry Alignment on Advocacy and HSE

Global Leadership Forum

Global Leadership Forums transitioned from a virtual platform to in-person, topical Strategic Dialogues with Industry Partner exploration executives and Governing Member CEOs, with 13 industry partners represented at the Q3 forum. The moderated discussions on the challenges, opportunities, and role of the energy geoscience industry foster creativity for members and the Alliance to think strategically towards our common goal: advancing the energy geoscience industry to move exploration, production, and sustainability goals forward. The dialogues reinforce that our partnership is essential, there is no exploration or production without the geoscience industry, and no geoscience industry without the exploration industry.

- Increased Input
 - > EnerGeo added a new category of Industry Partner membership, Allied Partners, for companies with a majority focus on exploration and development of alternative energies and CCUS, including subsidiaries of current Industry Partners.
 - > EnerGeo established the Energy Evolution Workgroup to focus on the application of geoscience and exploration to both carbon sequestration and alternative energy development as EnerGeo engages on the development of policy and regulatory frameworks for these activities.
- Increased Alignment
 - > Published joint EnerGeo/Africa Oil Week (AOW) paper, “Exploration Sector Best Practice Blueprint 2.0,” highlighting key elements to attracting and maintaining energy investment in Africa, rolled out at AOW 2022.
 - > Moderated special energy geoscience industry executive panels at AOW featuring only EnerGeo members.
- Increased Support

14 energy companies (Industry Partners) increased commitment to the EnerGeo Alliance in 2022: APA, BP, Chevron, ConocoPhillips, Eni, Equinor, ExxonMobil, Houston Energy, Murphy Oil, OXY, Shell, Total, Tullow, and Woodside





INFLUENTIAL LEADERSHIP

Influential Leadership

Successful development and launch of new brand, EnerGeo Alliance

Without a doubt, our most successful accomplishment of 2022 was our rebrand. In early 2022, we underwent a brand transformation from IAGC to the EnerGeo Alliance with a new logo and refreshed colors but maintaining our same effective tagline Energy Starts Here®. With the exuberant support and guidance of our Board of Directors, our member companies helped us to successfully launch our new brand.

Our new name and look capture the essence of our organization and our strategy for representing the energy geoscience industry. We are a credible, informative alliance of industry leaders. We are future-forward thinkers, innovative, dynamic, and stable. We are EnerGeo Alliance.



EnerGeo Alliance Rebrand recognized as a 2022 American Marketing Association Crystal Awards Finalist



2 major trade publications covered the rebrand: UpstreamOnline and SEG SmartBrief

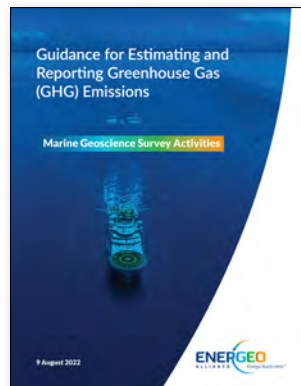
34 media outlets worldwide picked up the rebrand launch announcement



Standard-Bearer for the Industry

We are an industry-wide standard-bearer of safety, environmental, and operations efficiencies and standards. We work with our members throughout the entire energy value chain to provide standards, specifications, and efficiencies to facilitate and support their achievement and maintenance of safety and environmental standards.

- EnerGeo published Guidance for Estimating and Reporting Greenhouse Gas (GHG) Emissions for Marine Geoscience Activities. As the first of its kind for the industry, the guide is designed to promote consistency in accounting and reporting of the industry's scope 1, 2, and 3 emissions.
- EnerGeo published its updated Model Master Licensing Agreement and Statements of Principles (MLA).
- Published the 2021 EnerGeo HSSE Statistics & Performance Data Report.
- Published the first EnerGeo Alliance HSSE Quarterly Report which included best practices, lessons learned, and High Potential Incidents.
- Published EnerGeo Alliance Industry ESG Statement.



Guidance for Estimating and Reporting Greenhouse Gas (GHG) Emissions



2021 EnerGeo HSSE Statistics & Performance Data Report



Model Master Licensing Agreement and Statements of Principles (MLA)

Partner with Industry Leaders and Advocacy Groups Around the Globe

To enhance industry advocacy effectiveness and establish consistent positions on emerging policies and issues, EnerGeo continually develops and maintains strong, cooperative relationships with executive leadership across the energy geoscience industry and with energy thought leaders and international and regional industry trade associations.

Africa

- Presented at several key African conferences: AOW Panel, AEW Keynote, AEW Panel
- Met with Southern African Foundation for the Conservation of Coastal Birds (SANCCOB) to answer basic questions about seismic surveys with more engagement scheduled.
- Met with the South African United Fishing Front (SAUFF) who shared their stakeholder engagement input to inform the broader EnerGeo stakeholder engagement guidance.
- Expanded EnerGeo's regional and global trade association engagement and met with the South African Oil and Gas Association (SAOGA) and will continue to partner with the group for Freedom to Operate in South Africa.
- Engaged with Good Governance Africa; partnership development is underway.

EnerGeo is building partnerships with alternative energy trade associations to foster engagement and alignment

- Renewable U.K., WindEurope
- American Clean Power
- Carbon Capture Storage Association (CCSA)
- Oil & Gas Climate Initiative (OGCI)

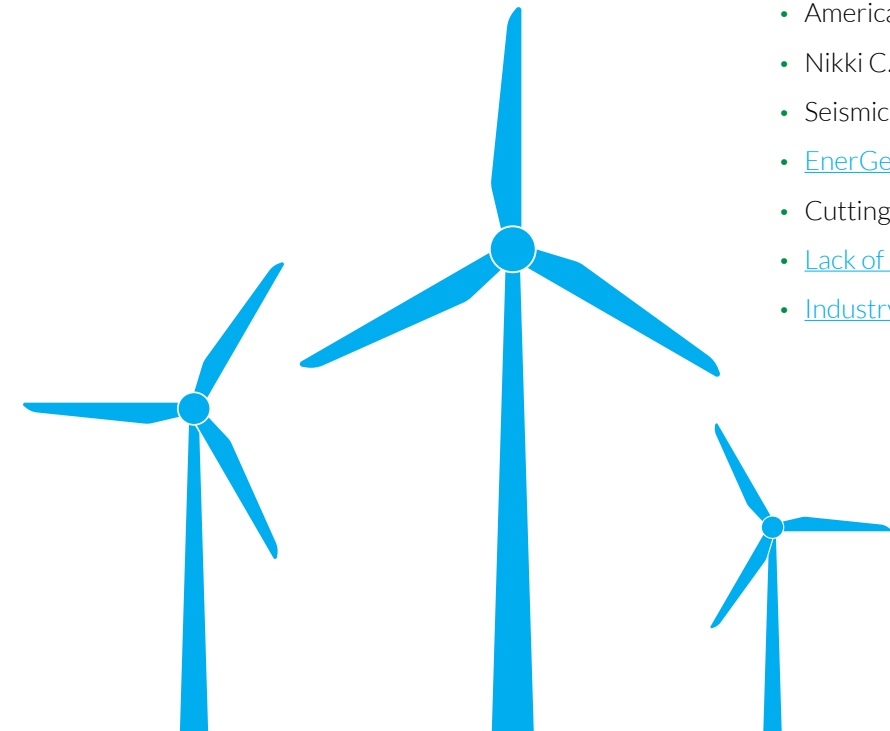


Raising the Alliance's Visibility

As the leader in shaping the discussion regarding energy geoscience operations and elevating issues central to our industry within the broader energy industry, among trade associations, governments, and the media as well as other key stakeholders, EnerGeo staff participate in numerous conferences, events, informational summits, and webinars led by our President, Nikki C. Martin.

Thought Leadership, Nikki C. Martin

- Moderated the EnerGeo 2022 OTC panel, "Accelerating the Energy Transition: Synergies for effective opportunity derisking and monitoring."
- Keynote and panel speaker at the Deepwater Executive Summit
- IMAGE '22
- SEG Women's Network: featured panelist in webinar [Advancing Sustainability with a Local, Regional, and Global Impact](#).
- [Where Energy Starts: How This Houston Alliance Is Transforming the Industry's Future](#), Houston Chronicle
- [Geophysical organisation rebrands for energy transition](#), Upstream
- Federation of Houston Professional Women Executive Conference
- American Clean Power Association's Offshore WINDPOWER2022 Conference
- Nikki C. Martin on Oil and Gas Industry Leaders Podcast, Ep126, OGGN Oil and Gas Industry Leaders Podcast
- Seismic Testing, 90.7 WMFE (Florida)
- [EnerGeo Alliance and Its Members Take the Next Step in Guiding the Energy Evolution](#), LinkedIn
- Cutting through the political talking points: Biden Administration's permit backlog controls the fate of near-term domestic supply, LinkedIn
- [Lack of U.S. energy permitting is preventing energy cost relief at home and abroad](#), World Oil
- [Industry: Scientists' warnings about seismic blasting based on 'distortions'](#), News24



Communications and Outreach: The Year in Numbers



Website:



EnerGeo wins the Houston Business Marketing Alliance’s Award of Excellence Lantern Awards of Texas best in category for its website.



Social Media:

3,820
Total Followers

1,147
New Followers

2,840
Unique Visitors in 2022



873
Total Followers

396 **241**
Tweets Mentions

Media Engagement:

1,387
ONLINE NEWS MENTIONS

Key Articles for 2022:

- **Global rebrand visibility:** [Upstream Online and Accelerate](#), Geophysical organisation rebrands for energy transition
- **Key shaping the dialogue proactive outreach:** [Africa’s The Guardian](#), [EnerGeo](#), [African Energy Chamber \(AEC\)](#) Call on Scientific Community to Rethink Distorted and Misinformed Data and Research on Seismic Survey Impacts
- **Key challenging misinformation response:** [Africa’s News/Fin24](#), [Scientists warn of seismic blasting harm, as Mantashe on harm offensive in Eastern Cape](#)

Press Releases:

10 **PRESS RELEASES**

- [EnerGeo Alliance Welcomes NMFS’ Announcement on Revised GOM Regulations](#)
- [EnerGeo Alliance Again Urges National Marine Fisheries Service to Break Permitting Logjam After Congress Calls on the Agency to Act Urgently](#)
- [EnerGeo Alliance Welcomes Faisal Diab and Shawn Rice to Global Team, Expanding Its Reach and Effectiveness](#)

> **VIEW ALL PRESS RELEASES**

Energy Starts Here™



Public Outreach

EnerGeo continued pursuing program expansion to enable better public outreach, data analysis to support scientific research, and pivotal partnerships with relevant stakeholders.

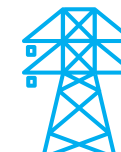
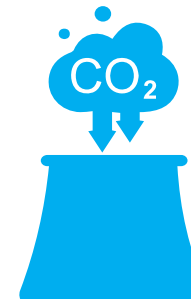
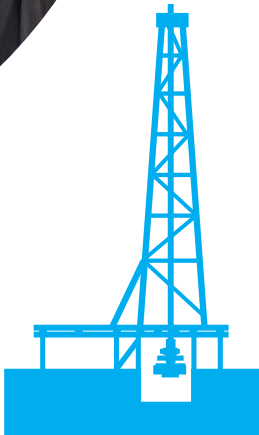
- Judge in Switch Energy Alliance's 2022 International Energy Case Competition featuring young people from all over the world presenting their unique insight into the energy industry and challenging these students to think critically about how the world can transition to a sustainable, equitable energy future.
- Engagement with the Houston Business Forum for a meeting with Texas and Houston Congressional staffers.
- Sponsor for Consumer Energy Alliance (CEA) Energy Day 2022, inspiring the next generation of students to explore a future in STEM, and energy in particular.

EnerGeo Alliance Informational and Networking Events

EnerGeo Alliance offers virtual events and meetings on substantive, relevant business content to deliver greater value and create deeper connections with constituents. The Alliance also speaks, sponsors, and attends numerous conferences, meetings, and events around the globe to ensure industry and organization visibility, while sharing industry information that supports our strategic plan.

EnerGeo Alliance Events

- Total number of sessions: 20
- 5 townhalls with member companies
- 9 member summits and webinars
- 6 other events, including 2 Women of EnerGeo Happy Hour Events



24
Total Number
of Events

External Meetings Participation:

- | | | | |
|--|-----------------------------------|--|-------------------------------------|
| • 3rd CCUS & Hydrogen Decarbonisation Summit | • EAGE Annual Conference | • LATAM & Caribbean Hydrogen & CCUS Decarbonization Summit | • OTC 2022 |
| • 8th Joint Trades Summit | • Global Offshore Wind Conference | • NOIA Annual Meeting | • SEG Women's Network |
| • ACCOBAMS Meeting | • Guyana Basins Summit | • NOIA-OOC CCUS Symposium | • Sound & Marine Mammal Conference |
| • Africa Oil Week (AOW) | • Hart Women in Energy | • OEUK Exploration Event | • South Africa 2nd Pre-Colloquium |
| • African Energy Week (AEW) | • IMAGE '22 | • Offshore WINDPOWER 2022 | • Suriname Energy, Oil & Gas Summit |
| • AOGA Annual Meeting | • IOPER Annual General Meeting | • OOC | • Total/WoodMac Event |

Consultative Approach That Gets Results for Members

The EnerGeo Alliance is more than a facilitator, it serves as an advisor to governments and provides consultation to members. We develop and provide critical, relevant content and research to members and take a consultative role to deliver greater value.

It has long been our strategic emphasis on utilizing a consultative approach as a critical business partner for our members, leveraging our core competencies and expertise in the areas of government and regulatory engagement and policy, science, and communications and media engagement.

In 2022, EnerGeo staff provided individual consultative support for several member companies. Countries where we have provided our specialized support for members include:

- Argentina
 - > Provided litigation support.
 - > Provided exclusion zone consultation.
- Australia
 - > Direct media outreach to correct the record about seismic survey operations.
 - > Supported member by assisting in determining the appropriateness/ effectiveness of a media statement.
 - > Provided operations consultation.
- Greece
 - > Supported company following a stranding event regarding surveys and the environment, underwater sound, and wider applications of geophysical technologies. Also conducted media research to determine any trending of the issue.
- South Africa
 - > Coordinated with three members to develop a regulatory and communications strategy.
 - > Engaged with PASA to defend surveys plans against NGO challenges, coordination with members and Industry Partner on communications and scientific data to support continued surveys facing growing NGO opposition.
- United Kingdom
 - > Supported a member by reviewing and editing messaging and talking points for their operations.
 - > Supported affidavit preparation and provided expert legal declarations.
- United States
 - > Concerning nuclear waste issue, provided fact sheets, talking points, and assisting with a media plan.
 - > Provided GOM ITR consultation.
 - > Provided GOM LOA consultation to four members.
 - > Provided U.S. data confidentiality consultation.
 - > Provided material consultation to a member of Congress.



Eye on 2023: Providing Innovative Solutions As Our Members Expand

Proactive Story Telling Initiatives for Effectiveness

EnerGeo Alliance's next evolution of raising the industry's visibility is by telling a renewed story of our role as a long-standing partner in reducing the environmental and carbon footprint of energy exploration while accelerating discoveries and energy development. It is a remarkable story that needs to be told more broadly; we are now in the position to do that like never before. The energy geoscience industry has an imperative to share the invaluable contributions it provides to society and the global energy system as well as our critical role in the energy evolution and attaining Net Zero goals.

The energy geoscience industry has an **imperative to share the invaluable contributions** it provides to society and the global energy system.

Energy Starts with Me Initiative

In 2023, EnerGeo will launch its Energy Starts with Me initiative. Focused on regulators and policymakers, and the public, the initiative will launch in the primary target regions of the U.S. and U.K. and secondary target regions of Australia and Latin America (Argentina, Brazil).

Energy Starts with Me will feature member companies' workforces to articulate the value proposition of the energy geoscience industry and increase awareness of its critical contributions with our most important audiences. It will also help the broader energy community and the public connect the role of the energy geoscience industry to how they obtain their energy and better understand the industry's role in the energy evolution.

The initiative will consist of proactive earned media engagement, leveraging earned media to further amplify the value of the industry and to highlight the work of its employees. A key tool for participating member companies will be a Member Amplification Playbook that will contain everything needed to equip members with proper tools and guidance to be effective messengers of the initiative and highlight the message through their own networks and channels.

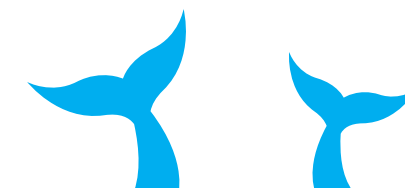


EnerGeo 2022 Annual Conference Highlights





Partnerships and Alliances





TOGETHER,
MAINSTAY
ALTERNATIVE
LOWER CARBON
ENERGY STARTS HERE.

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ENERGEOALLIANCE.ORG

