



# Driving the Future of Energy

**2023 Annual Report**





### ***Making Energy Possible***

For more than 100 years, the energy geoscience industry has played a critical role in the global energy system. From the most conventional forms of energy that we have relied on for over a century to groundbreaking new energy solutions, the energy of today and tomorrow cannot exist without us.

[> Learn More](#)



### **Making Affordable, Reliable, and Secure Energy Possible**

Energy is vital to modern life, and the energy geoscience industry is instrumental in ensuring that the broader energy sector can continue to deliver energy that is affordable, reliable, and secure.

[> Learn More](#)



### **Leveraging Technology to Solve Our Most Complex Challenges**

The energy geoscience industry sits at the forefront of engineering and data analytics, disrupting the status quo and leveraging the best of today's science and technology to help solve some of the world's most complex energy challenges. And we're just getting started.

[> Learn More](#)



### **Driving a More Sustainable Energy Future**

As an industry, we are making mainstay energy exploration and production more sustainable while creating more opportunities every day for new energy solutions that support our climate goals.

[> Learn More](#)

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# Chairman's Message

As the Chairman of the Board for EnerGeo Alliance, I am proud to have had the opportunity this year to contribute to the organization's extensive efforts to *drive the future of energy*, as outlined in our 2023 Annual Conference theme. EnerGeo is not just adapting to the fast-changing landscape of the energy industry; it is leading the evolution of the energy geoscience industry. This is achieved by leveraging its scientific and regulatory expertise and global relationships to advance the voice of the geoscience industry and by seizing all opportunities to enhance and develop it – from setting Health and Safety Executive (HSE) and sustainability standards, to providing resources to support operations in a complex, global environment.

This direction is clearly visible in the new programs and tools EnerGeo has introduced this year for its members. They include publications such as the “Energy Geoscience Industry Guidance for Stakeholder Consultation” and the updated “Monitoring of CCUS Regulatory Frameworks”; business solutions such as EnerGeo360, offering tailored consultations to tackle global energy access challenges; the EnerGeo Global Leadership Forum in-person meetings, a platform fostering dialogue between the exploration and the geoscience industries; and the groundbreaking awareness campaign *Making Energy Possible*.

At the end of 2023, the Board of EnerGeo also developed a new Strategic Plan based on industry needs, to guide the next five years. EnerGeo will focus on:

1. Pursuing the industry's *Freedom to Operate*, continuing its essential global government and regulatory engagement to ensure the industry can obtain and retain its license to operate. This is crucial in front of the growing challenges to subsurface and exploration operations that have increased risk, cycle time, financial exposures, and costs.
2. Supporting *People* in the industry by protecting and empowering the workforce through dedicated initiatives and inspiring the new generations.
3. Driving *Perception* by promoting knowledge and awareness through increased stakeholder communication.

I firmly believe that these three areas will shape the future of the energy geoscience industry, and EnerGeo Alliance is well-positioned to help build it daily and globally.



**Andrea Lovatini**  
Director, Exploration Data and Geosolutions,  
Digital & Integration SLB

*EnerGeo Alliance Chairman*

## ► A Word of Thanks

I would like to **express my gratitude** to Nikki Martin, my colleagues on the Board of Directors, and all the staff at EnerGeo for their **unwavering commitment** to EnerGeo's mission. The best successes are achieved by combining **teamwork and individual dedication**, and the people at EnerGeo demonstrate this **every day**.





➤ We are at the forefront of a significant change in **how people perceive energy** and have a **unique opportunity to participate actively in this transformation**. It is now essential to communicate our industry's role in **fostering energy abundance and sustainability**.

## President's Message

Ten years ago, when I joined what is now EnerGeo Alliance, the challenges for the geoscience industry were significantly fewer and less complex than today. In 2013, the former IAGC intervened in the first-ever challenge to exploration activities in the Gulf of Mexico. Fast forward to 2023, EnerGeo provided regulatory and legislative support to its members in 23 countries worldwide, writing over 400 pages of comments and letters to engage with regulators in a single year.

Behind these numbers lies the enormous change the energy geoscience industry has undergone over the past decade. Energy has become a critical factor for global development and a topic of worldwide debate. Our members' freedom to operate is now more critical than ever, and it significantly impacts the broader energy system. Geoscience surveys are essential to exploring new energy sources, including alternative and low-carbon solutions. Therefore, our engagement in global policy, legal, and public campaigns has accelerated exponentially, delivering increasing strategic value to our members.

We are at the forefront of a significant change in how people perceive energy and have a unique opportunity to participate actively in this transformation. It is now essential to communicate our industry's role in fostering energy abundance and sustainability. Although it's evident for those who operate in the industry, it's not yet well-known outside of it. In 2023, we launched *Making Energy Possible*, the first awareness campaign in the history of our industry, to address this need. The campaign was successful and will continue in 2024.

EnerGeo is evolving with its members to anticipate future energy challenges. As a trusted strategic partner to member companies, EnerGeo will continue to support them by advocating for supportive global policies, empowering industry professionals, and communicating the industry's value to stakeholders. Ultimately, we remain dedicated to *Making Energy Possible* and contributing towards building a sustainable energy future for everyone.

Nikki C. Martin  
EnerGeo Alliance President and CEO

# About EnerGeo Alliance

Founded in 1971, 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, we are *Making Energy Possible*.

## Our Role

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.

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 leverage data, science, and technology **to make affordable, reliable, and secure energy possible** while driving a **more sustainable energy future** for the world.



# 2023 Board of Directors

The EnerGeo Alliance Board of Directors is responsible for steering EnerGeo towards a sustainable future.

Name	Company	Position
Andrea Lovatini	SLB	Chairman
Rune Olav Pedersen	PGS	Vice Chair
Luo Junchao	BGP Inc., CNPC	Member
Dechun Lin	CGG	Member
Joe Dryer	Fairfield Geotechnologies	Member
Tony Bowman	PXGEO	Member
Forrest Burkholder	SAExploration	Member
Alan Hopping	Searcher	Member
Irene Waage Basili	Shearwater	Member
Carel Hooijkaas	TGS	Member
Rebecca Pitman	Shearwater	Treasurer
Tana Pool	TGS	Secretary, Legal Chair
Elaine Mattos	PGS	Americas Chair
Nick David	Shearwater	Asia-Pacific Chair
Knut Barstad	TGS	EAME Chair
Tristan Allen	SLB	GDLC Chair
Graeham Mackenzie	CGG	HSSE Chair
Nikki Martin	EnerGeo Alliance	President





# 2023 Global Leadership Forum

The Leadership Forum fosters an open dialogue between the exploration and the geoscience industries, enriching the perspectives of our members and partners and creating opportunities to collaborate in answering the energy challenges they share.



Name	Company	Title
Tracey Henderson	Apache	Senior VP, Exploration
Luo JunChao	BGP Inc., CNPC	President BGP Offshore, CNPC
Jay Thorseth	BP	VP Subsurface Global Renewal
Liz Schwarze	Chevron	VP - Exploration
Sophie Zurquiyah	CGG	Group CEO
Melissa Coleman	ConocoPhillips	GM, Exploration & Technology
Aldo Napolitano	Eni Spa	Exploration Director
Erling Vagnes	Equinor	Senior VP Subsurface EPI
John Ardill	ExxonMobil	VP - Head of Global Exploration
Joe Dryer	Fairfield Geotechnologies	President
Chris Olson	Murphy Oil	VP of Global Exploration
Pedro Romero	OXY	VP of International Exploration
Rune Olav Pedersen	PGS	President & CEO
Tony Bowman	PXGEO	Chief Executive Officer
Alan Hopping	Searcher Seismic	Managing Director
Forrest Burkholder	SAExploration	President & CEO
Irene Waage Basili	Shearwater	CEO
Bill Langin	Shell	Senior VP - West / Deepwater Exploration
Andrea Lovatini	SLB	Director, Exploration Data and Geosolutions, Digital & Integration
Kristian Johansen	TGS	CEO
Kevin Mclachlan	TotalEnergies	Senior VP - Exploration
Hugh O'Reilly	Tullow	Head of Exploration
Andy Drummond	Woodside Energy	EVP Exploration & Development

# EnerGeo Staff

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.



➤ **Nikki C. Martin**  
President & CEO



➤ **Dustin Van Liew**  
VP of Global Policy &  
Government Affairs



➤ **Criss Rennie White**  
VP of Business  
Operations



➤ **Michela Fumagalli**  
VP of Communications



➤ **Dr. Alex Loureiro**  
Scientific Director



➤ **Jameson White**  
Director of  
Membership  
& Committees



➤ **Rose Ingrande**  
Manager of Programs  
& Operations



➤ **Mabel Smetters**  
Manager of Executive  
Operations



➤ **Ross Compton**  
Director, Global Policy

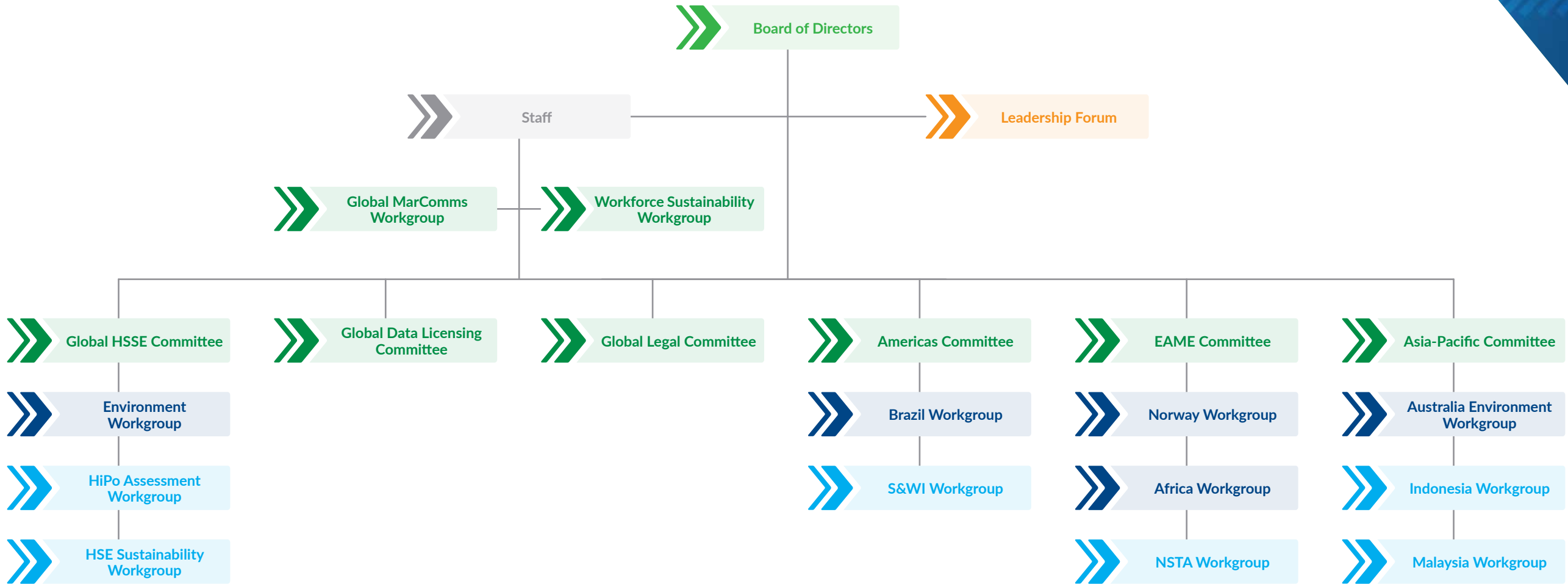


➤ **Dagmar Fertl**  
Environment Specialist



➤ **Taylor Medlin**  
Manager of Marketing  
Communications

# Organizational Structure



LEGEND: ■ Standing Committees ■ Standing Workgroups ■ Issue Workgroups

# Committees and Workgroups

## Global Data Licensing Committee

Provides input on EnerGeo recommendations and policy positions on data licensing issues impacting the multi-client energy geoscience industry. Informs EnerGeo’s regulatory engagement and educational efforts with governments, the energy industry, and other stakeholders on these issues.

## Global Legal Committee

Provides recommendations and oversight for legal actions in response to final regulatory initiatives and other issues and advises on issues and projects with legal implications, including EnerGeo’s anti-trust and competition policies.

## Global HSSE Committee

Provides input 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 EnerGeo.

## Regional Committees

- Americas Committee
- Asia-Pacific Committee
- EAME (Europe, Africa, and Middle East) Committee

Provide input on key priorities in the specific Region and support EnerGeo’s monitoring and engagement of emerging issues that may impact the industry’s freedom to operate in the area. Create and direct workgroups that address specific active issues in the Region’s countries to ensure alignment with EnerGeo’s objectives.

## EnerGeo Alliance Standing Workgroups

Convene to ensure timely engagement and response to issues relating to a specific region, country, or area of focus within the energy geoscience industry.

## 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 EnerGeo.



➤ “As an industry, we need to be moving in the same direction, leveraging resources and working together.”

**-EnerGeo Member**

# EnerGeo Alliance Membership

(Current Membership as of February 2024)

## Governing Members



## Industry Partners



## Contributing Members



## Associate Members



## Professional Services



2023 Revenue

\$4,880,857

98.3% Membership Retention in 2023 (based on revenue)



7%

\$321,478  
Supporting  
Members

8%

\$393,263  
Events

16%

\$767,000  
Industry  
Partners

33%

\$1,610,149  
Programs and  
Campaigns

37%

\$1,788,967  
Governing  
Members

# Making Energy Possible: Exploring and Creating the Future of Energy

The energy geoscience industry is *Making Energy Possible*: This is the starting point of EnerGeo strategy and the name of our first-ever public awareness campaign, launched in 2023 to educate our main stakeholders about the value of our industry as the enabler of the energy evolution.

While the world's energy needs continue to grow, and the global energy landscape is refocusing its priorities on the energy evolution, EnerGeo supports its members by providing science-backed expertise and advocacy, global representation, consultancy on specific issues, and by guiding the industry alignment.

## Strategic Priorities

Starting in 2023, we are focusing our role as a business partner to the industry on three main areas:

1. Pursuing **Freedom to Operate**, through our global government and regulatory engagement.
2. Supporting the **People** in the industry, by advancing their voice, and protecting and empowering the workforce through dedicated initiatives.
3. Driving **Perception**, by promoting knowledge and awareness through campaigns, partnerships, events, and media and social media outreach.

➤ EnerGeo provides **science-backed expertise** and **data-driven advocacy** to navigate the **challenges and opportunities** of the **energy evolution**.

➤ “We need to educate and engage on the geoscience industry's role in making energy possible.”

–EnerGeo Member







Freedom to Operate

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# Freedom to Operate

As the challenges to exploration and development operations increase, EnerGeo Alliance safeguards its members' freedom to operate through constant government and regulatory engagement.

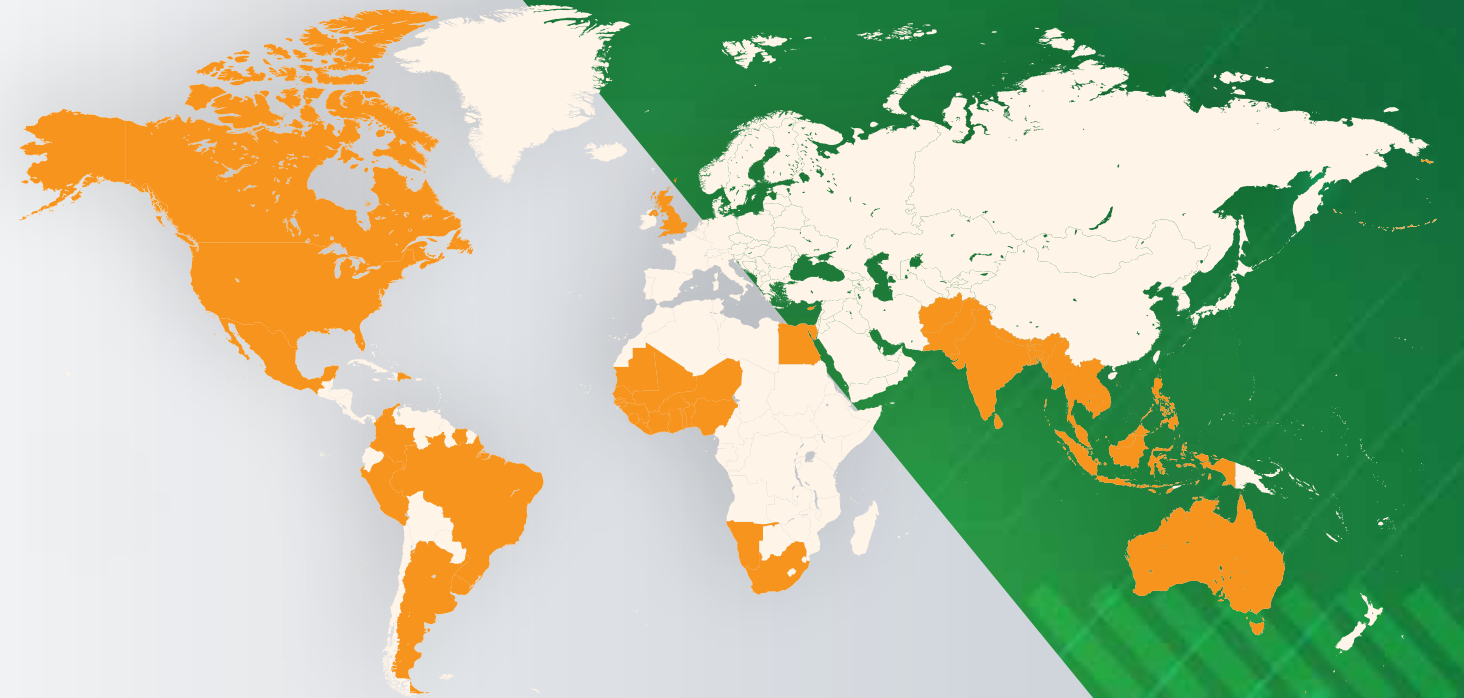
Our primary focus is advancing global energy access by engaging government and regulatory entities worldwide with credible scientific, technical, and legal analysis to enable the sustainable exploration and development of essential energy supplies.

Our work includes advocating for geoscience-driven energy policies and advancing frameworks to attract and maintain the investment of the energy geoscience and exploration industry throughout the life of the asset.

## EnerGeo Alliance: Turning Our Advocacy into Action

### Where EnerGeo Engaged in 2023

- > United States/  
Gulf of Mexico
- > Brazil
- > Australia
- > Africa
  - South Africa
  - West Africa
  - Namibia
  - Cote d' Ivoire
  - Gabon
- > Argentina
- > North Sea
- > United Kingdom
- > Canada
- > Indonesia
- > Southeast Asia
- > Uruguay
- > Mexico
- > Colombia
- > Dominican Republic
- > Suriname
- > East Mediterranean
  - Cyprus
  - Lebanon
  - Egypt
- > Peru



➤ “EnerGeo's access to regulators this year has been impressive and a tremendous effort.”

-EnerGeo Member

# Global Key Accomplishments

- Developed and published the Energy Geoscience Industry Guidance on Stakeholder Consultation.
- Represented the energy geoscience industry at the UN Oceans Conference.
- Presented at two side-events during 23rd Meeting of the Contracting Parties to the Barcelona Convention and its Protocol (COP 23) held in Slovenia.
- Presented at the International Regulators Forum (IRF) Annual Conference to the IOPER (International Offshore Petroleum Environment Regulators) group.
- Held an inaugural virtual regulator forum on geophysical applications (new technology) to increase knowledge among regulators.
- Maintained regular interface through multiple international and regional trade associations to expand presence in response to policies impacting the industry's access.
- Provided a monthly global policy monitoring report to members.
- Expanded engagement on CCS and alternative energy solutions, through dialogue and co-promotion with regional trade associations and submission of comment letters.
- Continued participation in relevant UN Environment Programme Meetings and the Business and Industry Major Group (BIMG), including submission of summary of the Sustainable Seas Initiative (Ghost Net Initiative) for inclusion in a UNEP report about positive impacts of industry on biodiversity/pollution reduction.
- Held webinar on geophysical applications (new technology) to increase knowledge among regulators and other stakeholders.
- Continued effort to present the EIA Handbook to government officials globally.



➤ “EnerGeo has an effective, well-organized, global view, and global strategy.”  
-EnerGeo Member

# Regional Accomplishments

## United States

- > Led the industry effort to file extensive comments on the proposed designation of Rice's whale critical habitat in the Gulf of Mexico (GOM), along with American Petroleum Institute (API).
- > Led development of joint Association comments for National Marine Fisheries Service (NMFS) proposed revised Incidental Take Regulation (ITR).
- > Opposed efforts to change crewing and manning requirements for vessels operating on the U.S. Outer Continental Shelf (OCS), through the Coast Guard Authorization Act.
- > Hosted virtual workshop with Bureau of Ocean Energy Management (BOEM) on U.S. CCS regulations.
- > Testified in the U.S. House of Representatives on proposed legislation to restrict the imposition of an unscientific, overly broad critical habitat designation for Rice's whale.
- > Continued efforts to modernize the Marine Mammal Protection Act (MMPA).



## South America

- > EnerGeo engagement with the National Petroleum, Natural Gas and Biofuels (ANP) Board directly led to reversal of the decision to discontinue the use of non-exclusive data, purchased prior to a lease round, to account for respective Minimum Exploratory Program (PEM).
- > Led discussions and presented to ANP on CCS technologies, market models, and regulations from other countries.
- > Worked with the Blue Amazon Network to centralize and make environmental data on the Equatorial Margin available.
- > Participated to a workshop in Uruguay with regulators from ANCAP to discuss seismic survey methodology and environmental management practices.
- > Presented the Blue Amazon Network results to Directors and Executives from Petrobras and the ANP.
- > Received support from ANP, Brazilian Institute of Environment and Renewable Natural Resources (IBAMA), and Petrobras to develop a portfolio project to be implemented with R&D funds.
- > Promoted the use of Netuno's database by members and IBAMA as a management tool and source of compliance evidence.
- > Published a joint book with IBAMA showcasing results of projects focused on seismic sound.
- > Presented on "Geophysical surveys for offshore wind" for The Brazilian Energy Research Company (EPE) and IBAMA.
- > Participated in the seminar promoted by International Oil & Gas Producers (IOGP) to the Suriname Government presenting on offshore seismic operations and mitigation measures.



## Europe

- Chaired day one of the 2nd Europe CCUS & Hydrogen Decarbonization Summit.
- Participated in OSPAR ICG-Noise meeting, completing the drafting of an updated chapter on seismic within OSPAR measures to mitigate the impact of underwater noise.
- Engaged with the UK Exploration Task Force, now re-launched as the UK Subsurface Task Force.
- Participated in DEFRA-led workshops on Short-term Management Measures of Underwater Noise and engaged with DEFRA to highlight the value of geoscience data as they prepare advice for ministers on Marine Spatial Prioritization.
- Presented to North Sea Transition Authority (NSTA) on alternative mechanism to the National Data Repository for providing the NSTA with access to legacy data for their internal purposes.
- Presented at the COP 23 in Slovenia to champion the Sustainable Seas Initiative and highlight the importance of geoscience in the energy evolution.
- Participated in Crown Estate led co-location workshop.
- Participated in second workshop on Marine Spatial Prioritization convened by the Seabed User & Developer Group.
- Filed comments on various consultations energy matters in the EU and the UK.
- Participated in ACCOBAMS Scientific Committee meeting in conjunction with IOGP, intervening on data inaccuracies regarding impulsive noise in ACCOBAMS publications.

## Africa

- Launched South Africa stakeholder mapping and engagement campaign.
- Published factsheet and videos on the importance of geoscience for South Africa.
- Provided comments to the Petroleum Agency of South Africa (PASA) on draft public consultation and notification guidance and input on Strategic Environmental Assessment discussions to support licensing activities.
- Met South Africa Department of Fisheries Forestry and Environment (DFFE) regarding acoustic modeling and propagation.
- Collaborated with ENS Africa to submit comprehensive comments on the marine sectoral plan for oil and gas being consulted on by the SA Department of Forestry, Fisheries and Environment.
- Sponsored publication by Good Governance Africa, providing articles covering the importance of geoscience and the facts regarding interactions with marine life.
- Co-hosted executive panel and roundtable in conjunction with Good Governance Africa during AEW.
- Moderated ILX/Frontier Exploration panel during AOW.

## Asia-Pacific

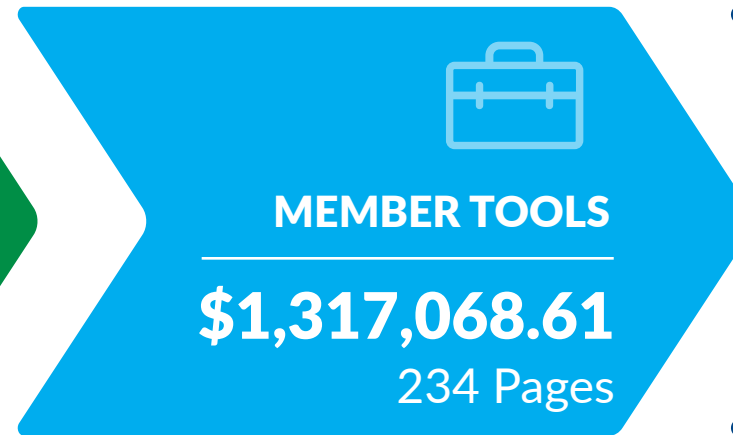
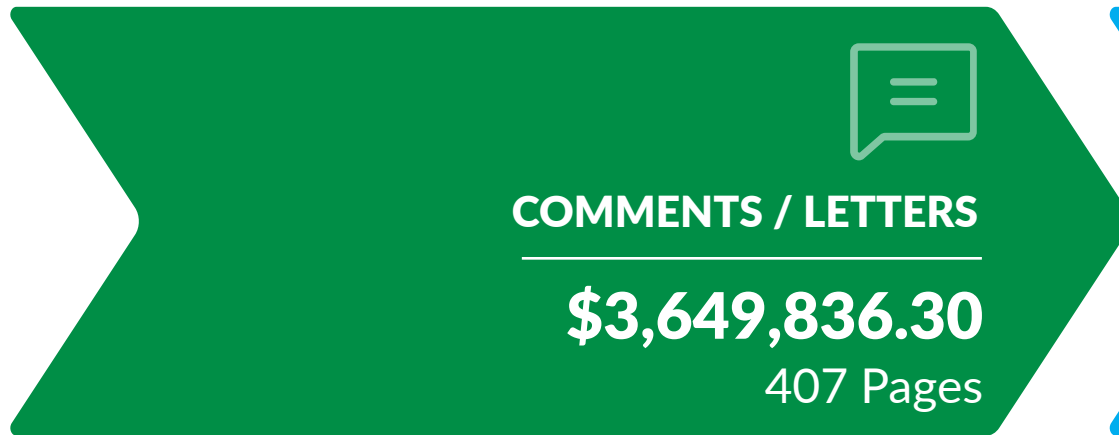
- Provided input for the National Offshore Petroleum Safety and Environmental Management Authority (NOPSEMA) publication “Supporting cooperative coexistence of seismic surveys and commercial fisheries in Australia’s Commonwealth marine area Guidance framework”.
- Engaged with Australian elected officials and regulators at NOPSEMA/NOPTA providing scientific information on energy geoscience, fisheries, cetaceans, and seismic.
- Issued a statement following the adverse Scarborough decision, calling for clearly defined consultation regulations.
- Filed comments in Australia on proposal to reduce data confidentiality periods, Future Gas Strategy, offshore wind areas, environmental plans.
- Engaged with print media to correct factual and terminological errors.
- Attended the NOPSEMA CEO–Traditional Owners summit and workshops.
- Engaged an Australian government affairs expert on government liaison in SE Australia.
- Published a member tool, “Carbon Capture & Storage (CCUS) in Australia”.
- Met with Minister offices and regulatory departments in Canberra, offering member’s input on consultation concerns and development of alternative energies and low-carbon solutions.
- Formed Workgroups focused on Malaysia and Indonesia.
- Participated in a panel session at the Asia Petroleum Geoscience Conference & Exhibition (APGCE) in Kuala Lumpur.
- Held an online meeting with the Energy Market Authority of Singapore to support assessment of the geothermal potential of Singapore.
- Attended the IPA Convex in Jakarta.

## Value-add

Our government, regulatory and legal efforts deliver measurable added value to our members, and the broader energy geoscience industry.

EnerGeo's proactive, targeted country outreach and engagement on emerging and current issues impact business by ensuring stability and sustainability.

Our value-add quantifies EnerGeo's regulatory activities and output, comparing them to the associated costs that a single member would expend if all pursued efforts outside of the EnerGeo Alliance, instead of pooling resources towards a common unified goal.



The 2023 value-add to the industry on policy matters is

**\$6,000,503.52**

# Resources to Support Industry Engagement

We create and publish high-quality resources to support our members' strategies in the energy industry.

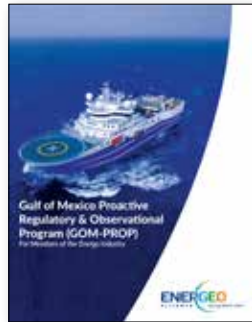
## Products published in 2023 include:

- ▶ "Energy Geoscience Industry Guidance for Stakeholder Consultation", a global high-level industry guide for consultation processes.
- ▶ 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.
- ▶ 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), Australia, Norway, and the U.K.



# Programs: Increasing Efficiency by Building Industry Standards

EnerGeo Alliance Programs provide consistent industry-wide standards and best practices that improve performance while decreasing costs of permitting and compliance.

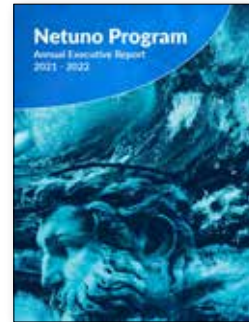


## Gulf of Mexico Proactive Regulatory & Observational Program (GOM-PROP)

This program **creates and maintains a long-term, self-sustaining framework to ensure regulatory compliance and continuity in the GOM.**

Participation in GOM-PROP satisfies the annual reporting requirement of Letter of Authorization holders under “Taking Marine Mammals Incidental to Geophysical Surveys Related to Oil and Gas Activities in the Gulf of Mexico,” (the “Gulf of Mexico ITR”).

It also provides a structure for industry to petition for a new Gulf of Mexico ITR to supplant the existing Rule, which will expire in 2026.



## Netuno Environmental Database Program (Netuno)

The Netuno program **enables compliance with the IBAMA Terms of Reference for offshore seismic surveys in Brazil.**

Netuno is a virtual portal that provides public environmental data from project implementations. This data, uploaded by members, has been a permit condition for all offshore seismic acquisitions in Brazil since mid-2018.

Under the management of EnerGeo, the Netuno database is continuously evolving, enhancing its efficiency to support the regulator's decisions and members' environmental project management and compliance. Our ultimate aim is to provide a reliable ESG tool while expanding the database's reach and usage.



## Seismic Efficiency Initiative & Safety Program (SEIS)

This program **provides specific counsel-approved initiatives, best practices, and standards to promote environmental protection, safety, and efficiency in the energy geoscience industry.**

It incorporates within the SEIS and HSSE Statistics Databases shared audits and inspections, standardized vessel specifications reports, standardized HSSE tender questionnaires, and HSSE performance statistics.

This industry-led effort accelerates value creation and shortens project cycles by saving time and resources.



# EnerGeo360: A Customized Response to Global Energy Challenges

To meet the evolving needs of the energy geoscience industry, EnerGeo has developed EnerGeo360, a results-driven advisory service offering customized turnkey solutions for clients' above-ground risks.

EnerGeo360 is the tailored solution for global energy access challenges, enabling member companies to execute their projects and operations to explore or develop energy in any region around the world.

EnerGeo has long focused on utilizing a consultative approach as a critical business partner for our Governing Members, leveraging our core competencies and expertise in the areas of government and regulatory engagement and policy, science, communications, and media engagement. This same expertise is now accessible through the EnerGeo360 Strategic Member Solutions.

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



Strategic Solutions  
Start Here™

- EnerGeo360 provides members **solutions** that promote regulatory and energy **access**, **credible** science, **consistent communications** and public relations, and **valuable** research and data.





People

## Advancing the Industry Voice

EnerGeo delivers tangible value for its members, by creating connections within the energy industry and building relationships with regulators.

### Global Leadership Forum

**The Leadership Forum fosters an open dialogue between the exploration and the geoscience industries, enriching the perspectives of our members and partners and creating opportunities to collaborate in answering the energy challenges they share.**

In 2023, EnerGeo's Global Leadership Forum confirmed the success of the in-person formula with two annual meetings – one in June in London and one in October in Houston - featuring special guest keynotes on new trends and strategic dialogues with Industry Partner exploration executives and Governing Member CEOs.

### New Technologies Forum

This innovative forum promotes a deeper relationship between our members and regulators around the world through dedicated meetings focused on the new technologies. Held in November, the New Technologies Forum featured two days of virtual meetings with representatives of government departments, ministries, research, and environmental agencies from 28 countries worldwide, including the Barcelona Convention Secretariat, the European Commission, the Bureau of Ocean Energy Management and National Oceanic & Atmospheric Administration.

### Town Halls

In 2023, nine EnerGeo members benefited from these customized events and had the opportunity to delve into issues where EnerGeo can provide support. Town Halls allow alignment on strategies and priorities, starting from a direct dialogue between a member company and EnerGeo.



➤ **“The Leadership Forum is a unique occasion to bring the peer group together on relevant topics and discussions with space for input.”**

**- EnerGeo Member**

# Protecting the Workforce

EnerGeo has a strong focus on protecting the energy geoscience industry's people by pushing continuous improvement in HSE & Sustainability Performance.

## HSE & Sustainability Forum

Top HSE executives from the energy geoscience and exploration industries come together in this dedicated event to advance best practices, protect and train their workforce, and further improve their attention to critical safety and environmental risks.

The October 2023 Forum covered various safety and sustainability-related topics, including HSE engagement with the next generation, ocean mapping, a presentation of the EnerGeo Sound, Environment, & Aquatic Species (SEAS) research program, and safety in marine activities.

## HSE & Sustainability Industry Alignment

We work together with our members to align the industry standards on HSE and Sustainability, developing and publishing guidance documents and reports including:

- > HSE Quarterly Reports and Annual HSSE Performance Data Report to share best practices, HiPos, lessons learned, near misses, and HSE trends.
- > Guidance for Estimating and Reporting Greenhouse Gas (GHG) Emissions – Onshore & TZ Geoscience Survey Activities.
- > 2023 Aide Memoir of fatalities and high potential incidents across membership.
- > Updated Support Vessel Guidelines and Inspection Checklist.
- > Under development: HSE Sustainability Guidance standardizing the important project plans (Risk Management, Security, ERP, Waste Management, Biodiversity, etc.) to pass down the industry's HSE knowledge to the next generation of professionals.
- > Under Development: Standardized High Potential Incident Assessment and Reporting (HiPo) Guidance to remove individual interpretation of incidents.

- ▶ We aim to enable the **next generation of HSE professionals** by providing them with **guidance, expertise, and dedicated tools** to facilitate their jobs.



# Empowering the Workforce

At EnerGeo, we support the empowerment of the energy geoscience workforce through dedicated events.

## Informational and Networking Events

Our exclusive Members-only events provide relevant business content and foster genuine industry connections. In 2023, EnerGeo hosted:

- > **EnerGeo '23 Annual Conference** - "Driving the Future of Energy" in Houston, hosting discussion panels with 39 industry experts.
- > **The Annual Membership Meeting**, a virtual event including two keynote speakers: NJ Ayuk, Founder and CEO of the Centurion Law Group and Executive Chairman of the African Energy Chamber; and Vijaya Ramachandran, Director for Energy and Development at The Breakthrough Institute.
- > **A LinkedIn live stream event** featuring NJ Ayuk and Nikki Martin, EnerGeo's President and CEO.
- > **A webinar focused on Carbon Capture and Storage technologies**, with the participation of four experts from the Global CCS Institute and from Beveridge & Diamond, a law firm specializing in environmental issues.
- > **A workshop on the energy evolution** with Glen Burrige, executive director of the European Federation of Geologists, focusing on natural hydrogen and geoscience.
- > **Two Regional Industry Forums** in Austria and Australia.

## Women of EnerGeo - Sips & Seismic

Sips & Seismic is a series of networking events crafted for the women of EnerGeo's member companies, aiming to create opportunities to connect and build rapport with peers and mentor across companies.

In March, we celebrated Women's History Month in Houston, while the June edition of Sips & Seismic was hosted in London. In December, another Sips & Seismic was held in Houston, including a successful toy drive that benefited the DePelchin Children's Center.

Sponsored by member companies, all the Sips & Seismic events registered a high participation rate, confirming the value of networking inside the industry.





# Perception

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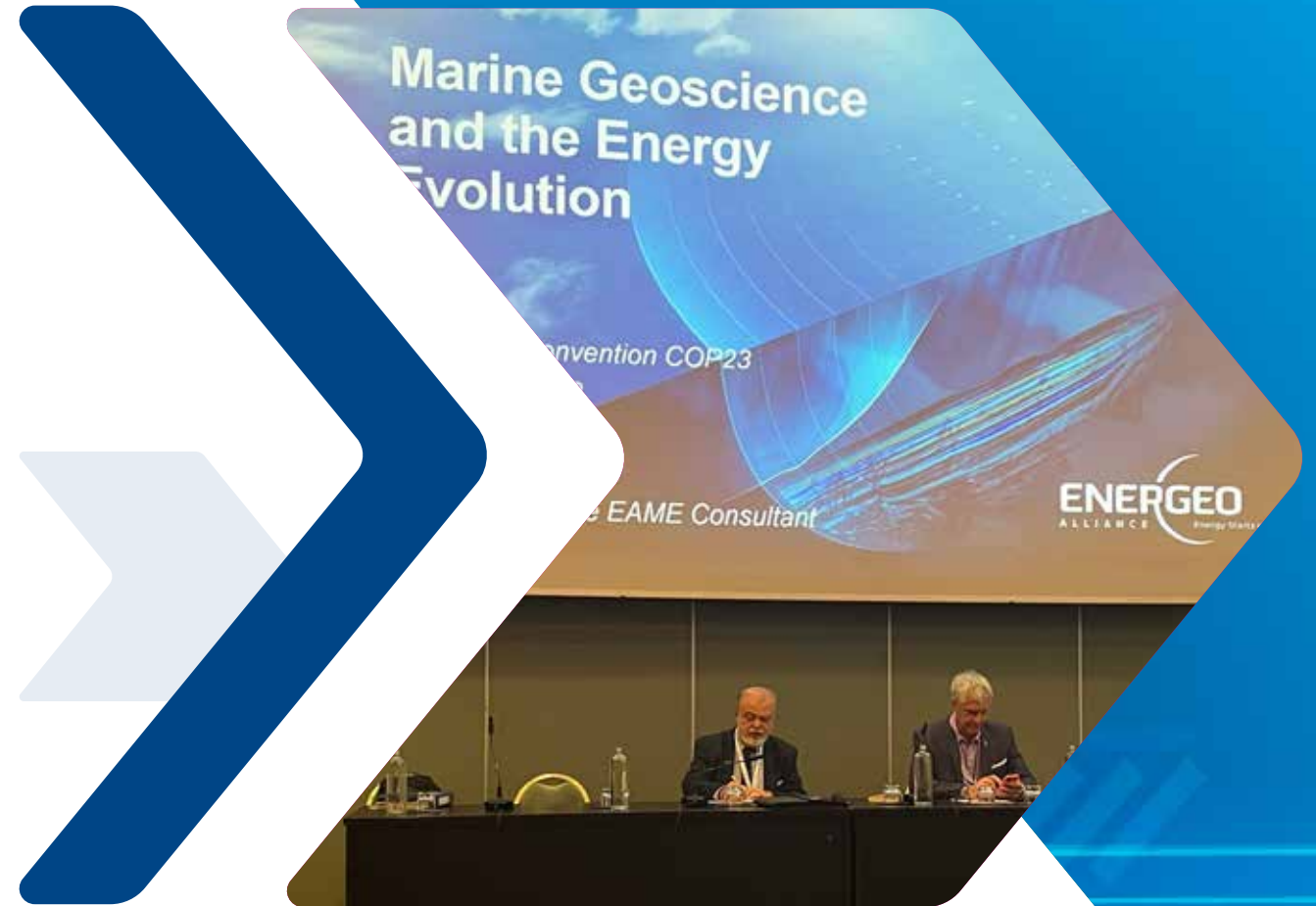
## Credible Science

We have built a reputation for being a credible and reliable source of information. Our credibility is grounded in science and data.

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. We engage governments and regulatory bodies globally with credible scientific analysis that undergirds and guides our technical and legal analysis and government and regulatory strategy.

### Key Successes

- Formally launched the Sustainable Seas Initiative (SSI) to formalize and expand the work of the Ghost Net Initiative and bring the program to other industry sectors.
- Participated in COP 23 of the Barcelona Convention in Slovenia as accredited non-governmental observers, and presented side events on the Sustainable Seas Initiative and the importance of energy geoscience in advancing energy development goals.
- Hosted a new technology forum for regulators where EnerGeo members provided examples of upcoming and newly released seismic survey technology.
- Testified in the U.S. House of Representatives on proposed legislation to restrict the imposition of an unscientific, overly broad critical habitat designation for Rice's whale.
- Participated in a panel session at the Offshore WINDPOWER meeting regarding combatting misinformation.
- Traveled to Montevideo, Uruguay to discuss best practices for environmental management for seismic surveys.
- Met with the Brazilian Petroleum and Gas Institute (IBP) in Brazil regarding proposed environmental research to better inform the authorization of surveys in the country.
- Presented at EAGE conference in Uruguay regarding environmental best practices for seismic.
- Supported numerous technical comment efforts on protected species.
- Initiated launch of Sound, Environment, & Aquatic Species (SEAS) research program, working closely with BOEM and other U.S. regulatory agencies to launch a follow-up to the GoMMAPPS population density study with a focus on Rice's whales through the BOEM Environmental Studies Program.
- Published a paper on the importance of GOM-PROP in the newest edition of the Effects of Noise on Aquatic Life textbook.



➤ **“Our industry needs real data and science-based information to combat misperceptions and prejudices.”**  
**- EnerGeo Member**



# Making Energy Possible Campaign

*Making Energy Possible* is the first-ever public awareness campaign promoted by the energy geoscience industry.

Launched in September 2023, it aims to fill the knowledge vacuum around this industry, targeting key stakeholders to educate them about the critical role geoscience plays in the global energy system.

Amplifying the member company and employee voices, the campaign articulates the value proposition of the energy geoscience industry through a campaign microsite, short videos, and static displays. A dedicated social media kit, to be used by EnerGeo members to relaunch the campaign through their company channels, complements the paid portion of the campaign.

*Making Energy Possible* campaign is supported by the AAPG Foundation and our Impact Partners:

- > API
- > BGP
- > BP
- > ConocoPhillips
- > Chevron
- > CGG
- > Fairfield
- > MagseisFairfield
- > Oxy
- > PGS
- > PXGEO
- > SAE
- > Shearwater
- > SLB
- > Teledyne Marine
- > TGS
- > TOTAL
- > Woodside



 **2,050,377**  
Impressions

**1,593,587**  
Static

**456,790**  
Video

\*Stats are referred to the seven weeks of MEP - Phase 1 (from Sept 19th to Nov 7th)





# 3,138

Clicks Through the *Making Energy Possible* Website

# 2,543

Static

# 595

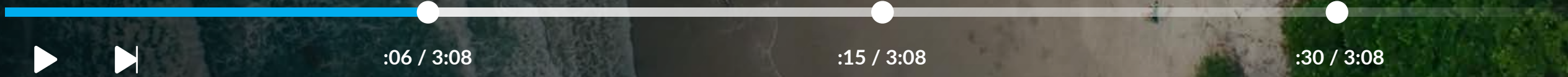
Video

VCR – Video Completion Rate

**:06 – 85.89%**  
(v. 70% goal)

**:15 – 79.25%**  
(v. 65% goal)

**:30 – 69.08%**  
(v. 60% goal)



Video Complete

**:06 – 103,548**

**:15 – 133,640**

**:30 – 115,246**



# 0.16% CTR

CTR – Click Through Rate Static Display  
(v. 0.02% goal)



# 0.13% CTR

CTR Video Display  
(v. 0.10% goal)

# Sustainable Seas Initiative

Through the [Sustainable Seas Initiative](#), the EnerGeo Alliance's members and the greater energy geoscience industry are committed to creating a healthier ocean environment by clearing marine debris that endangers marine life.

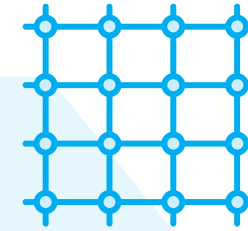
Seismic survey crews form the backbone of this initiative, with their fundamental role in removing marine debris from the oceans and often rescuing entangled animals.

Crew members are called to take photographs when encountering and freeing endangered wildlife and collecting and delivering marine debris to the dock at the end of a rotation at sea. All data, photos, and other information are shared with EnerGeo Alliance to contribute to our growing archive of data on marine debris.

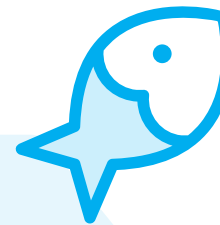
EnerGeo Alliance will produce a report that captures the magnitude of the positive impact of our members' contribution as environmental stewards in the energy geoscience industry.

EnerGeo also published the [Recommended Best Practices for Geophysical Survey Crews to Assist Entangled Wildlife](#) to support crews in their efforts to save entangled animals.

- EnerGeo Alliance membership has reported **2,497,000 pounds of debris removed** since 2016, when the initiative began.



- An estimated 640,000 tons of abandoned nets are spread across the world's oceans, comprising up to 10% of oceanic litter.



- In Puget Sound alone, derelict fishing gear kills over a half million sea-creatures each year.



- Plastics can remain in the marine environment for 600 years.

## Visibility

EnerGeo staff participates in numerous conferences, events, informational summits, and webinars to shape the discussion regarding energy geoscience operations in the broader energy industry.

### EnerGeo 23 Annual Conference

This is a unique event to listen to the energy industry's most authoritative voices, with panel sessions hosting 39 experts in 2023. 200 professionals took part last October in [EnerGeo 2023](#) - "Driving the Future of Energy" and focused on regional and global trends, risks, and opportunities in policy, business, and the economics of energy exploration and low-carbon solutions.

> [Watch the EnerGeo 23 highlight reel](#)

### Events with EnerGeo Speakers

- > IMAGE'23
- > Houston Strategy Forum
- > Africa Energy Week 2023
- > CCUS 2023
- > 2nd Europe CCUS & Hydrogen Decarbonisation Summit
- > International Offshore Wind Partnering Forum (IPF-BNOW)
- > Africa Women in Energy International Summit
- > AAPG Energy Opportunities Conference 2023
- > Professional Women's Networking Group
- > MicroSeismic User Forum
- > Deepwater Executive Summit
- > Africa Oil Week
- > IRF/IOPER Annual Meeting
- > First EAGE Conference on South Atlantic Offshore Energy Resources
- > IOGP NIMOS-SHI Workshop
- > COP 23 held in Slovenia



### Awards

- > Nikki Martin – Influential Women in Energy Program Award 2024
- > Nikki Martin – Vicki Hollub Innovation and Leadership Excellence Award 2022
- > Alex Loureiro – Ally Grit Awards 2023



➤ We seek to **challenge, inform, and motivate** our membership, audience, policy influencers, and broader energy industry community to **take action** on issues affecting the **ability to connect** more people with **sustainable and accessible energy**.

# OUTREACH

Our outreach efforts drive the perception of the energy geoscience industry. Earned media mentions, thought leadership op-eds, and our social media channels are complementary vehicles to create awareness around our industry's role in the energy evolution.

## Media Engagement

**1.8B** Potential Reach  
(approximate number of article views we appeared in)

**3.4K** Editorial Mentions  
**94%** Exposure increased compared to 2022

## Key Articles

[EnerGeo in the News - EnerGeo Alliance](#)

[EnerGeo says seismic surveying does not irreparably damage marine life | Creamer Media's Engineering News](#)

[The Misplaced Fury around Sound: Time to Put the Record Straight on Seismic Surveys in South Africa | BusinessGhana](#)

[Lack of Access to Cleaner Energy Endangers Humans, Especially Women and Children, Says EnerGeo Alliance | Science Times](#)

[Opinion: Carbon capture, storage will help the Permian Basin thrive | Chron](#)

## Social Media

 LinkedIn



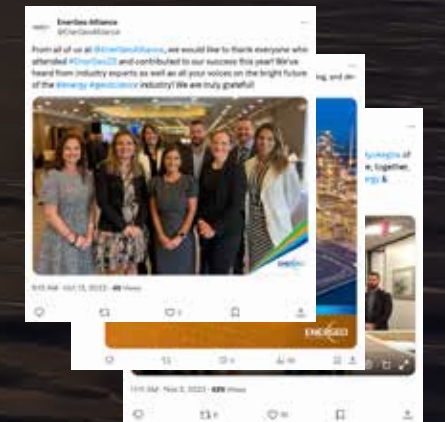
**242,245** Impressions

**4,631** Followers

**890** New Followers

 X (Formerly Twitter)

**22.8K** Impressions  
**908** Followers



# Eye on 2024

## Driving the Future of the Energy Geoscience

In 2024, we will officially launch our new five-year strategy, which will be focused on addressing the growing challenges faced by exploration and development operations and ensuring that our industry continues to play a crucial role in the future of energy.

We believe that the energy geoscience industry's success in the upcoming years will be built on three pillars: Supportive policies and regulations, talented people, and well-balanced stakeholder perceptions. Policies and regulations form the foundation of the industry's license to operate and, ultimately, of access to energy. Our people and their expertise are the building blocks that shape our industry's tomorrow. Stakeholder perceptions about our value will impact future energy development.

EnerGeo will focus on three operational imperatives to advance these three areas: We will scale our core technical and scientific competencies, utilizing this valuable asset to extend our reach further. We will elevate our communications, ensuring our messages will reach the appropriate targets. We will uplift the collaboration among our members, aligning and working together to tackle the complex challenges that lie ahead of us.

- ▶ EnerGeo's extensive scientific and regulatory **expertise**, strong global **engagement**, and **outreach capabilities** will allow us to **raise the voice** of the **energy geoscience industry** externally while continuing to provide **valuable** instruments to **support** our members' needs and **establish industry standards**.

In 2024, we will continue to be our members' voice, business partner, and progress facilitator. We will support a balanced global energy development and ensure that our industry is well-positioned to play a crucial role in driving the future of energy.





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