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Acknowledgements

This strategic review was conducted by the WLPGA secretariat with the support of a Strategic Review Committee, appointed by the WLPGA Board. The Strategic Review Committee comprised the following individuals:

James Rockall (Chair) - WLPGA
Ahmad Bambang - Pertamina
Makoto Arahata - Japan LPG Centre
Nikki Brown - Cavagna Group
Blaise Edja - Oryx Energies
Alex Evans - ETG International
Andrew Ford - SHV Energy
Mauricio Jarovsky - Ultragaz
Ercüment Polat - Aygaz
Shailendra Sharma - Indian Oil Corporation
Cameron Ure - Elgas
Armando Viçoso - Repsol
Grace Willis - PERC
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LPG is used for cooking on all continents. It is clean, efficient, and portable and a chef’s favourite because of its instant and perfectly controllable heat.
Foreword by WLPGA CEO & Managing Director

... we fully recognise that our members are our greatest asset, and for WLPGA to grow, we need to both satisfy our membership and further improve how we work together...

James Rockall
CEO and Managing Director, WLPGA

Welcome to the 2017 – 2019 Strategic Review of WLPGA activities. This report documents the result of the WLPGA’s three-year strategic planning review. It presents the outcomes of in-depth research conducted by the WLPGA secretariat in collaboration with a Strategic Review Committee. The objective of the review is to set the direction of the WLPGA for the period 2017 – 2019 through updating, as appropriate, the association’s missions/goals and objectives while ensuring continuing clarity, relevance and feasibility.

The LPG industry continues to undergo change, both within – with the ongoing departure from the business of major integrated companies, and without – from shifting supply & demand and increasing focus on sustainable energy solutions. In this dynamic environment the WLPGA is constantly reassessing how to maximise the value to its membership. The periodic strategic review is a principal element in this.

With a full, holistic approach to WLPGA activities, its organisational structure and the environment within which it operates, this report effectively positions the WLPGA for improving its impact in the coming three-year period. We fully recognise that our members are our greatest asset, and for WLPGA to grow, we need to both satisfy our membership and further improve how we work together. The theme of this three-year plan “growing influence, increasing impact” captures our principal strategic objectives – to have a more effective and powerful voice in order to open greater opportunities for the industry and specifically, for our members.
This Strategic Review of WLPGA activities is part of a regular review of the business and policy environment within which the LPG industry operates in the world and which aims to steer the actions and resource management of the WLPGA to provide maximum value to its members. It is carried out every three years.

The review is done on an incremental basis. That is through asking how the environment (both external to the industry and internal) has changed in the last three years and how, as a consequence, WLPGA should adjust its focus, resource allocation or structure.

The findings indicate a great deal of satisfaction with the current performance of the WLPGA and recommend maintaining the existing mission around four principal goals:

A. Demonstrate the benefits of LPG and inform, educate and influence all stakeholders

B. Support the development of LPG markets

C. Promote compliance with standards, good business and safety practices

D. Identify innovation and facilitate knowledge transfer

In contrast, it was determined that the vision of the WLPGA could be improved to a shorter, punchier version:

The WLPGA promotes the use of LPG to foster a safer, cleaner, healthier and more prosperous world.

While the review highlighted many of the same issues from previous reviews, key differences related to the perception of LPG and the LPG industry in the broader energy context. Competition from other fuels and the risk of LPG being seen negatively as a fossil fuel has grown in importance. The most important opportunity for the WLPGA was identified as improving external communications and this will require both a shift in the focus of the WLPGA as well as an improvement, led by the WLPGA, in the coordination within the industry with regard to external communication. Of particular importance is the efficient coordination with other national and regional LPG associations.

Other important findings were the need to ensure a balance of activities between developed and developing LPG markets; the need to work more closely with the natural gas industry in areas of mutual interest; the opportunity for Autogas development and LPG as a solution for improving urban air quality. Innovation and the development of new LPG applications remains a very important part of WLPGA activities and in the coming period Exceptional Energy in Action will continue to be prioritised while a new member category will be proposed – for LPG appliance manufacturers. Finally, the promotion of good industry practices remained a high priority with an increased focus on cylinder management and enforcement of regulations.

From an organisational and business process perspective, certain improvements in the WLPGA are highlighted. Firstly, there needs to be greater focus on fewer, measurable objectives which facilitates reporting and communication with members. Secondly, leveraging the member resource needs to be improved through restructuring the WLPGA network groups. Instead of
several, discrete networks which do not map precisely to the current goals, a matrix structure will be put in place with a direct mapping of all activities with each goal, valid for the three-year period of the strategic review. As well as ensuring member engagement with all aspects of the strategic plan, this structure will ensure that network meetings are focused on the issues that are relevant to the geography where the meetings are held.

With regard to resource requirements, this strategic plan assumes a zero increase in membership fees during the period (in contrast to the 3% per annum increases that have been applied since 2010). Revenue growth will be achieved through an absolute growth in membership with a target of 300 members by the end of 2019 – equivalent to a net growth rate of 20 new members per year. Reserves in the association at the end of the period are forecast to be circa €850k.

Finally, to improve the communication with members, particularly with regard to reporting on ongoing activities and completion of objectives, a dashboard approach will be implemented in a revamped members-only website. This is seen as important in both engaging and retaining members.
1. Strategic review process

The secretariat, together with the strategic review committee conducted the review. Central to the process was the “Focus Questionnaire and Interview” which engaged with 30 senior executives engaged either directly in the industry or as key stakeholders in WLPGA activities (see appendix 2). The Focus Questionnaires addressed:

- Views on the changes in the business environment since the last review in 2013.
- An assessment of the ongoing relevance of the WLPGA Vision and Mission statements.
- Changes needed in WLPGA activities that can best respond to the new business and economic environment.
- Opinions on the WLPGA’s performance in the last three years and potential for improvement.

The focus interviews (see appendix 3) were conducted by telephone or face-to-face during the period January to February 2016. The feedback was subject to an in-depth analysis by the WLPGA secretariat in Paris on March 23rd and subsequently by the full Review Committee on April 20th in Paris. Views and comments received were tested, discussed and prioritised.

In addition to the Focus Questionnaire, WLPGA circulated a simplified on-line questionnaire to all members on February 11th which received 62 replies (compared to 38 replies that were received during the last strategic review).
2. Outcomes

The outcomes of the interview process provided a clear understanding on a range of issues related to the changing environment, the threats and opportunities for the industry and the performance of the WLPGA in a number of areas.

Interviewees were asked a fundamental question on the current performance of the WLPGA:

**How satisfied are you with the value that WLPGA has delivered to your organisation in the last three years?**

The results were very clear. 90% of respondents were either satisfied or very satisfied. This outcome is important since it endorses not only the results achieved by the WLPGA but also the process and procedures to which we work, including the strategic review process.

2.1 WLPGA Vision and Mission

The vision of the WLPGA should be neither time-dependent nor affected by short term strategic imperatives but encapsulate the role of the organisation at the highest level. Feedback from the focus questionnaires and on-line questionnaires indicated a preference for maintaining the vision as it is. Subsequent discussions at the Industry Council on May 17th resulted in a request to the Review Committee to consider incorporating “safe” into a shorter, punchier vision. Following a survey of all Industry Council members the following vision was agreed:

*The WLPGA promotes the use of LPG to foster a safer, cleaner, healthier and more prosperous world.*

With regard to the mission, this is something that reflects the shorter-term operational activities of the WLPGA and can be subject to revision in response to significant changes in the environment in which the business operates.
Fig 2.1 below shows that the current mission statements, as reflected by our four principal goals, are seen as highly appropriate. Some feedback on the mission included a suggestion to have a specific goal around improving the perception of LPG, however, this is adequately covered under the first goal. Other comments received related to improving delivery on these goals rather than changes to the goals themselves and this will be covered elsewhere in the response to the review.

On May 17th the WLPGA Industry Council approved retaining the current mission.

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**Fig 2.1 Appropriateness of the WLPGA mission**

- **Demonstrate the benefits of LPG and inform, educate and influence all stakeholders.**
  - Strongly agree: 31.5%
  - Agree: 65.57%
  - Disagree: 3.28%

- **Support the development of LPG markets.**
  - Strongly agree: 58.33%
  - Agree: 10%
  - Disagree: 1.67%

- **Promote compliance with standards, good business and safety practices.**
  - Strongly agree: 58.33%
  - Agree: 5%
  - Disagree: 1.64%

- **Identify innovation and facilitate knowledge transfer.**
  - Strongly agree: 55.74%
  - Agree: 37.7%
  - Disagree: 5%
2.2 Changes in the operating context

In general, many of the trends noted from the focus interviews were unchanged from the previous strategic review. In response to the question on what are the critical issues facing the industry, the most important issue was LPG being seen as a fossil fuel with the possible negative policy environment that this would entail. In this context, legislation around limiting CO₂ was seen as a threat (even though in responses to other questions, reducing CO₂ was seen as an opportunity compared to other traditional fuels). Growth of bad practices is seen as a threat to the business across the world in the coming years and this is also reflected in the concern that the industry is becoming more fragmented with a loss of sector knowledge with the departure of the major integrated companies. It is important to note that competition from other fuels is a concern to interviewees (see figure 2.2 below) but this is natural in a competitive multi-fuel environment. The response from the WLPGA to this should be to further improve the communication around the positive aspects of LPG to ensure that the voice of our sector is heard.

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Fig 2.2 What do you see as the most critical issue facing the LPG Industry over next 3-5 years?

- A | Anti-fossil fuel lobby as a threat. CO₂ legislation being a threat
- B | Growth of bad practices
- C | Competition from other energies
- D | Increasing fragmentation in our industry – loss of voice (and loss of good practices)
- E | Clean electricity as a threat (linked to C)
- F | Knowledge deficit/loss in the sector (linked to D)
- G | Importance of natural gas and need for cooperation
- H | Threat of natural gas (as opposed to G)
- I | Identifying new sources of demand
- J | Future-proofing the industry (bio LPG)
- K | Volatility in supply and price
- L | HNS – risk of sea disaster
Key long-term objectives for the WLPGA

During the last strategic review the most important objective for the WLPGA was seen as promoting LPG as a safe and efficient fuel and enhancing the image of LPG. During the current review we can see from fig 2.3 that this remains the primary objective of the association with an emphasis on improving perception. Promotion of good practices remains a high priority as it was in the last review although specific references to cylinder ownership appear to reflect a more widely-held concern around respect of the brand and avoidance of unauthorised cross-filling.

Important changes to the long-term objectives of the WLPGA which were not raised in the previous review are:

- The need to improve cooperation with the natural gas industry which now appears as the WLPGA’s second most important role.
- To provide guidance / coordination to national associations.
- Promotion of LPG appliances.

These are important changes that are reflected in the responses to other questions in the review and therefore, objectives addressing these issues should be included in the coming plan.

Fig 2.3 What do you see as the long term objectives of the WLPGA?
2.4 | External factors: trend analysis and implications for WLPGA

A series of questions related to the external environment in which the industry operates provides a clear overview of the threats and opportunities that face the LPG sector.

When looking at opportunities, fig 2.4 below highlights the environmental benefits of LPG together with the potential for autogas (in cities) as the two opportunities for LPG. While Autogas in cities is clear, the context of “environmental opportunities” and the response of the WLPGA needs to be understood. Firstly, the environmental benefits of LPG relative to other fuels have to be demonstrated in a credible way, either through original data-gathering and analysis or through collecting and disseminating existing, credible data. Secondly, once demonstrated, the environmental case for LPG needs to be communicated effectively. These are activities on which WLPGA can deliver.

Price advantage has not previously (in earlier reviews) been highlighted as an opportunity for the business. That it is now seen as the third most important opportunity is likely a reflection of current pricing. Whether this is a long term opportunity is impossible to say given the volatile nature of energy pricing, however, from the WLPGA perspective, low (and relatively low) price should be included in the communication around the product to key stakeholders.

That new WLPGA initiatives such as Cooking For Life and Exceptional Energy in Action are included in the short list of opportunities is a strong endorsement that these programmes are relevant and should be continued. Likewise Autogas promotion – a long standing activity of the WLPGA is – highly ranked, indicating that this should be an area of continued focus for the WLPGA.

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**Fig 2.4 What are the major opportunities for the LPG industry in the coming 3 years?**

- A | Environmental
- B | Autogas (in cities)
- C | Price advantage
- D | Cooking for Life
- E | Oil to LPG switching
- F | New & innovative applications
- G | Bio-LPG
- H | Partnership with natural gas (inc LNG & ethane)
- I | Low cost petchem feedstock
- J | Engine fuel (non Autogas)
- K | Power generation
Turning to threats, we see a dramatic change in the last three years. Where price volatility and supply instability were the leading concern amongst interviewees these issues have dropped to seventh in relative importance (see Fig 2.5). Instead, the greatest perceived threat, by a long way, is now seen to be coming from competing fuels and increasing prejudice against fossil fuels.

Other important considerations are poor government policy and bad practices (third and sixth respectively), while poor awareness of LPG benefits has appeared in the list of threats for the first time.

These emerging trends call for more focus on external communications of the benefits of LPG and the need to improve perception.

**Fig 2.5 What are the major threats for the LPG industry in the coming 3 years?**

A  | Increasing competition from other energies (electricity/nat gas)
B  | Increasing prejudice against fossil fuels
C  | Poor government policy
D  | Loss of expertise in the industry due to majors leaving
E  | Poor awareness of LPG benefits
F  | Development of bad practices
G  | Price volatility
H  | Geopolitical issues causing supply disruption
I  | Climate change with LPG being part of the problem
J  | Safety – threat of major incidents
When asked for specific suggestions on how WLPGA could take advantage of these opportunities or mitigate the threats, the responses were remarkably similar to the last review. The need to improve communication was again seen as the highest priority, with government lobbying again in second place. Strengthening these activities would appear to be crucial for improving the position of LPG in the energy sector.

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**Fig 2.6 How can WLPGA take advantage of these opportunities and mitigate any threats?**

A | Improve communication
B | Effective lobbying of governments
C | Build partnerships with influential third party organisations
D | Training to promote LPG and develop markets
E | Produce credible data on the sector to support advocacy
F | Focus on developing markets and Cooking For Life
G | Engage with car manufacturers
H | Help national associations become more effective
I | Focus on developing new applications

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2.5 Internal factors: WLPGA strengths and weaknesses

There is a broad acknowledgement from interviewees that the WLPGA is performing very well and in fact the comparison between the feedback from the last review and this one is more positive in terms of perceived value-added and importance of WLPGA activities to member companies. The strengths of the WLPGA need to be recognised and leveraged in order to further improve performance. Fig 2.7 below reinforces the feedback from the last review. These strengths are vested in the broad network of the WLPGA, the quality and competence of the staff and the influence that we can bring to bear. It is important that WLPGA continues to engage with the most senior leadership of the industry in order to maintain the quality of the network and the influencing power. Regarding quality of the secretariat, it is also important to recognise that the current team has been stable for several years and should be seen as significant investment by the members and something that should be maintained.

Fig 2.7 What do you see as the major strengths of the WLPGA?

The weaknesses of the WLPGA are less specific without a clear leading issue. Lack of resources is highlighted as a barrier to increasing influence and generating greater value for members. Communication is also seen as a weakness and this is something that the WLPGA needs to recognise and respond to. Feedback on communications highlighted the need for greater and more effective external communication while many respondents emphasised the role that WLPGA should have of coordinating the messaging of the industry globally to ensure consistent, effective and efficient communication.
Poor project execution and project management were raised by some respondents, which is something not raised in previous reviews. This will be reviewed internally and possible specific training will be identified for staff.

Recommendations on how WLPGA should overcome these weaknesses focused on increasing available resources (through increasing membership, but also through other sources); improving communications, particularly external; leveraging the power of the member networks and driving greater diversity in membership. The need to be both global and local could be managed by having more nationally or regionally-focused meetings and engaging more closely with national associations.

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Fig 2.8 What do you see as the major weaknesses of the WLPGA?

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<th>A</th>
<th>B</th>
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<th>D</th>
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<tr>
<td></td>
<td>Communications (too internal)</td>
<td>Insufficient resources</td>
<td>Lack of member diversity</td>
<td>Poor execution of projects</td>
<td>Lack of regional focus e.g. Asia</td>
<td>Difficulty in retaining members</td>
<td>Limited member engagement</td>
<td>Hard to identify a weakness</td>
<td>Poor support to Autogas segment</td>
<td>Lack of influence towards policy makers</td>
<td>Insufficient producer engagement</td>
<td>Poor coordination with (and between) members and lack of preparation for network meetings</td>
<td>Poor collaboration with national associations</td>
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2.6 External perception of the WLPGA and the LPG industry

A new question that was posed to interviewees during this review was a judgement on how the WLPGA and the LPG industry more generally are perceived externally, and how they should be perceived. Overwhelmingly the WLPGA needs to be seen as the global authority on LPG, representing the knowledge resource of the industry.

Fig 2.9 How should WLPGA be perceived?

SHOULD BE PERCEIVED AS:
A | As the authoritative voice of the industry
B | As the knowledge resource of the industry

IT IS PERCEIVED AS:
1 | It is not known well outside the industry
2 | It lacks authority and only has a small voice
3 | There is some confusion between role of world and national associations
4 | Knowledge on autogas is poor
5 | Does not offer value above that of national association
6 | Can be seen as the defender of member economic interest
7 | Beware the GLPGP – they are changing the landscape

In reality, many feel that the association is not well known outside the industry (reinforcing the need to improve external communications), that it lacks authority and only has a small voice. These potential deficiencies correlate strongly with the perceived weaknesses of the WLPGA i.e. lack of resources and need for improved external communications.
Regarding the LPG industry, respondents felt that it should be seen as a provider of clean, versatile, modern energy while being innovative and future-proof. The reality is that the industry is actually seen as old fashioned, dangerous or the fuel of the poor. There is also confusion between LPG and natural gas. These issues clearly need to be addressed though enhanced communication of the benefits of LPG. Another perception is that the industry is not innovative but rather is focused on transporting gas from point A to point B with little consideration of the customer experience or the applications that a customer uses, including for instance Original Equipment Manufacturers (OEMs). This perception may be a reality that cannot be solved through better communication but rather the industry needs to be more proactive at embracing new technology and improving cooperation with the appliance industry. The role of the WLPGA in facilitating this needs to be addressed in the activity plan for the coming three years.

Fig 2.10 How should the LPG industry be perceived?

**SHOULD BE PERCEIVED AS:**
A | As a clean versatile, reliable energy
B | A solution to climate change and deforestation
C | Future proof
D | Innovative

**IT IS PERCEIVED AS:**
1 | Old fashioned
2 | Confused with natural gas
3 | Dangerous
4 | The energy of the poor
5 | A fossil fuel
6 | As simply moving gas from point A to point B
7 | A niche fuel
8 | Not proactive (ref OEMS’s)
9 | Male dominated
2.7 WLPGA events

The amount of internal resources dedicated to events, whether the World Forum, Regional Summits or the AEGPL Congress has increased in the current period. The interviews addressed the value of WLPGA events with specific questions – something that has not been addressed in previous reviews.

Feedback on WLPGA events was very positive. The revenue from these meetings was seen as a vital contribution to the overall resources of the association and, compared to other industry events, the WLPGA was seen as being best in class. There was strong encouragement to continue with regional events even though there is a perception that there is risk of event saturation – not from WLPGA events, but from many other organisations.

Fig 2.11 What are the strengths and weaknesses of WLPGA events?

STRENGTHS:
A I Quality of speakers / information transfer
B I Level and diversity of participants
C I Networking
D I Well organised

WEAKNESSES:
1 I Limited reach outside the industry (3)
2 I Nothing new each year (2)
3 I Too broad content – need regional focus
4 I Forum is held where sponsorship is likely – missing countries that need it
5 I Parallel sessions – impossible to see everything
6 I Risk of saturation of LPG events
7 I No follow up from WLPGA to develop projects emerging from Forum
8 I Inviting celebrity speakers
2.8 WLPGA networks

The need to further improve effectiveness and efficiency and fully leverage the member network has been raised informally during network meetings in the current period. It was therefore decided to add a specific question on this subject to the review process.

Outcomes are shown in figure 2.12. The findings regarding strengths are not surprising. The networks are key for knowledge transfer and networking. However, a number of systemic weaknesses were reported. Principally the limited active engagement of members (and lack of diversity of members) in the networks was seen as a weakness. In addition, networks were seen to lack focus or be “all talk and no action”. These weaknesses are not strategic but structural and it is vital for WLPGA to address these in the coming plan if it is to optimise the value to membership and leverage the value inherent in the member network. Many suggestions were received on how to improve network performance, including greater use of web-based communication (webinars etc.), greater focus on fewer projects, improving the formal commitment of network (and project working group) participants through the use of simple terms of reference for individual participation.

Fig 2.12 What are the strengths and weaknesses of WLPGA networks?

STRENGTHS:
A Knowledge transfer, including publications
B Networking

WEAKNESSES:
1 Limited active participation of members / same people
2 Overlap between networks
3 Lack of focus (GAIN) and talk but no action (GAIN)
4 Lack of follow up / lack of leadership
5 No impact
6 Need more web-based interaction
7 Need greater focus on fewer projects
8 WINLPG risks being too focused on gender (rather than diversity)
2.9 Imperatives for change – what WLPGA should address

The value of WLPGA’s current mission was assessed through the on-line questionnaire in two questions: How important are certain activities to your organisation and how has the WLPGA performed in these activities. The outcome from these questions is shown below in figs 2.13 and 2.14.

With regard to importance, all key activities that WLPGA undertakes (with the exception of training) are considered by more than half of respondents to be either very important or important and therefore need to be continued. The relative importance of these activities gives a good indication of the level of resources that should be allocated in the future. Compared to the last review the category “very important” has grown significantly. The activities that received the most “very unimportant” scores were Cooking For Life and Autogas, however, this may be due to the heterogeneity of the industry e.g. Cooking For Life tends to be more relevant to members with operations in emerging markets while Autogas is not at all relevant to many members. However, the importance of these activities to the member groups that are interested is so high that WLPGA should continue to have a focus on them.
With regard to how WLPGA has performed in these activities (see fig 2.14) we see a similar profile i.e. WLPGA has performed well in those activities that are seen as most important. This could be that WLPGA has a very clear understanding of the importance that members attach to certain activities and respond accordingly. This is likely given that the issues of importance have not changed significantly during the last three years. There are some activities for which the performance of WLPGA has been poorer than the relative importance attached by the members (although, with the exception of training, all have more than 50% of replies indicating a performance of excellent or good). These are: assistance to technical issues, promotion of good practices, identification and dissemination of technology and Autogas. There is no clear reason from the responses received why this should be the case, however, it should be noted and efforts made to improve.

Fig 2.14 How has the WLPGA performed in the following activities?
When asked how WLPGA can add more value to the industry, the clear priority was on improving communication with all stakeholders. There were also important comments that WLPGA should focus on promoting new applications and should engage more effectively with international organisations. With regard to how WLPGA can add more value to its members, there were no strong common issues identified, however, better engagement with members and improved lobbying were seen as important.

Interviewees were asked if other products or services, in addition to the ones highlighted above, should be offered. The majority of responses said no; scope is sufficient – focus on implementation. However, some possible areas of future activity were raised such as better dissemination of information to members, emissions testing of appliances and vehicles, increase contact with OEMs and carry out more webinars.

Much of the activity of WLPGA is in core projects – those that are funded by the core budget and to which all members contribute. However WLPGA has the possibility to carry out special projects for groups of members (minimum three) to address certain issues in more depth. These “special projects” are funded directly by the members concerned. In response to a specific question on whether WLPGA should continue to conduct special projects, the overwhelming response was yes (33% unconditionally “yes” and 50% “yes, but”. Only 16% felt that special projects were inappropriate.

The “yes, but” responses had various conditions but mostly related to the need to ensure that focus and resources were not taken away from core projects and that members wishing to conduct special projects should pay a consulting fee. Given the strong support to the concept of special projects it is recommended that this line of activities be continued.

2.10 New partnerships

WLPGA works with many other organisations in partnership to better leverage its resources to provide influence that can positively impact the sector and support the strategic objectives. Interviewees were asked if new partnerships should be formed; which and how. The feedback is interesting (see fig 2.15).
The growing importance of the natural gas industry is clearly seen in the responses. This is not limited to the International Gas Union (although that was mentioned several times) but also national gas associations or other organisations dealing with gas. Car manufacturer associations should be a target for WLPGA to enable greater interaction with the OEM industry. Other national LPG associations that are not yet members should also be encouraged to join (or created if they don’t yet exist). There was also feedback suggesting that WLPGA had sufficient partnerships and should not develop more.

2.11 Membership fee

In recent years the WLPGA has increased the membership fee by 3% per year to cover inflationary cost increases as well as increases to the scope of projects. Interviewees were asked their opinion on the appropriateness of these increases. Most (73%) thought the increase was appropriate while 27% felt it was not. Of those who felt it was appropriate, 63% qualified their response by saying that any increase needs to be justified.
This review process involved gathering the opinions of the WLPGA membership as well as senior executives, both within the industry and within relevant external organisations, on what they believe the goals of the WLPGA should be in the context of the changing business environment in which we operate. In order to avoid misunderstanding the definition of the terminology used in this review is listed below:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td><strong>Vision</strong></td>
<td>A statement that provides long strategic direction for the organisation.</td>
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<tr>
<td><strong>Mission</strong></td>
<td>A statement or series of statements that describe the organisation’s purpose in general terms.</td>
</tr>
<tr>
<td><strong>Goals</strong></td>
<td>Generalised statements of what the organisation wants to focus on during a defined period.</td>
</tr>
<tr>
<td><strong>Objectives</strong></td>
<td>Specific, measurable targets for each goal. They are short term and typically there are several for each goal. As they are measurable they can be used to gauge the degree of success in implementation of the goals.</td>
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<td><strong>Actions</strong></td>
<td>Are defined tasks that contribute to achieving the objectives. Actions may be of short duration or cover multiple years. They should be clearly resourced with an assigned responsibility for completion with a start and an end date.</td>
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</table>

Given the very clear feedback from the extensive review with WLPGA membership via the on-line questionnaire and the focus interview responses, it is recommended to modify the Vision of the WLPGA as follows:

**The WLPGA promotes the use of LPG to foster a safer, cleaner, healthier and more prosperous world.**
The mission will be maintained as it is:

- **A** Demonstrate the benefits of LPG and inform, educate and influence all stakeholders.
- **B** Support the developments of LPG markets.
- **C** Promote compliance with standards, good business and safety practices.
- **D** Identify innovation and facilitate knowledge transfer.

The mission statements above will form the four goals of the WLPGA in the coming three year period.
3.1 Goal A - Demonstrate the benefits of LPG and inform, educate and influence all stakeholders

The vision of the WLPGA is to promote the use of LPG worldwide. Goal A has a very high importance to the realisation of the vision. The strategic review highlighted external communications as probably the single biggest opportunity for the WLPGA to add value to the LPG industry. More specifically the outcome of the review highlighted the following:

- A need for improvement in overall external communications.
- Improve the wider global understanding of LPG and its benefits.
- Increase harmonisation of messages.
- WLPGA has a small voice and is not heard beyond its own industry.
- Need for dissemination of more information.
- Need for more case studies.
- Improved newsletter programme (specifically The Voice).
- More use of web based opportunities to communicate.
- The need to work more closely with national LPG associations.
- Support for Exceptional Energy and possibly an Exceptional Energy version 2.
- Increased use of social media.
- Increase communication on benefits that switching to LPG can provide in a development context.
- Align with natural gas.

The following objectives for Goal A are proposed:

**OBJECTIVE A1**

Develop and further improve external communications to improve the perception, awareness and stakeholder management of LPG globally through: (1) Review and agree the benefits of LPG and produce a charter of benefits to be adopted by members. The first version of this charter to be produced by the end of 2017 to incorporate an agreed suite of benefits adapted to issues and measurable by tracking member communications activity; (2) A thorough identification of industry stakeholders via a stakeholder audit to be initiated Q1 2017; and (3) develop programmes to educate and influence all stakeholder groups, these specific programmes to be determined upon agreement of charter and stakeholder research.

External communications has been repeatedly highlighted as an area for improvement and is an area of highest priority. External communications is a critical focus area which has an impact on all other projects and there is a need for communications to be transversal across all activities to ensure consistent messaging. The continuation of internal communications work will ensure that the industry speaks with one voice and quotes consistent data.

There will be an overhaul of the communications plan through a revision of activities around the Exceptional Energy brand to launch Exceptional Energy II which will aim to communicate the agreed benefits in a targeted manner to each Stakeholder Group. A focus in the 2017-2019 period will be to keep the Exceptional Energy brand at the top of mind of the stakeholder audience through encouraging brand adoption, development of content and a completely upgraded social media campaign. Specific campaigns for the period will include a focus on LPG in urban areas under the theme “Exceptional Energy in the City”.
Critical to the success of Objective A1 will be the coordination with national and regional LPG associations to ensure consistency and amplification of messages. The associations network is a potentially very powerful group with a significant combined outreach. Increased cooperation with associations is essential to more fully leverage the joint communications efforts and agree roles and responsibilities.

Other activities to be completed under this objective include upgrading the WLPGA newsletter suite, constant update and creation of new material, informing through new channels (video, webcasts), regular update of the WLPGA websites and face-to-face meetings.

In addition, a great deal of feedback from respondents highlighted the threat of LPG being treated as any fossil fuel in the climate change debate. To counter this, an update of the relevant Exceptional Energy publications on climate change will be carried out during the period. The UNFCCC process will continue to be monitored in order to inform the industry on the outcomes and consequences of the COP meetings.

In order to amplify its external communications, WLPGA will also reach signed agreements with ten key international organisations covering cooperation to further the WLPGA mission.

**OBJECTIVE A2**

The primary goal of Objective A2 is to leverage the significant potential outreach of members and member associations in order to extend and amplify overall communications. By defining the role of all members and engaging their support this will ensure consistency in messages, widen the outreach of communications, and ultimately help further deliver on Goal A1.

Internal communications to be developed and further improved through bi-monthly newsletters, biannual meetings of member communications executives, a revamping of the members-only website and, through web-based tools, ensuring participation of 62.5% of members, either directly or by proxy to the WLPGA Annual General Assembly.

Internal communications were generally perceived as good in the period 2014 – 2016. However, in order to better leverage the value of the member network, a greater focus will be placed on the role of members in stakeholder engagement, with WLPGA encouraging and enabling members to support the overall industry goals. The goal in the coming period is to advise members of WLPGA activities, generate a sense of value in membership and encourage greater member involvement in WLPGA initiatives. Key to this will be the Associations Executive Network which is the only global network of LPG associations. This group meets once a year during the World Forum and it is proposed to hold an additional mid-year meeting at the time of the AEGPL Congress together with a webinar for those Associations Executives unable to attend in person.

An important component of the WLPGA membership proposition is a free copy of the annual Statistical Review of Global LPG and this publication will be produced in an accurate and timely manner.
The strategic review was highly complementary about WLPGA events and this objective is a continuation of the objective from 2014 – 2016. The annual forum has a key role to play in supporting goal A by promoting and positioning LPG with key stakeholders. The location and theme of the events will be chosen to reinforce the WLPGA strategy during the period.

OBJECTIVE A3
Hold an annual World Forum with at least 450 delegates covering all costs. In addition hold at least three self-funded regional summits addressing regional / thematic issues.

In addition to the Auto-gas.net web site and the bi-monthly publication, Autogas Updates, Objective A4 will include the development of a global vision for Autogas with quantifiable elements to be communicated to policy makers and other stakeholders. In terms of messaging, we will not modify the Autogas key messages (safe, available, growing, clean, convenient) but will focus on developing language around innovation and strengthening the scientific evidence behind the Autogas environmental claims.

As part of the Autogas communications campaign, agree on concrete and regular cooperation with six global influencers to include LPG within their strategies as a necessary and valuable alternative fuel for transport. In this context global influencers should be understood as automotive and equipment manufacturers, NGOs, global institutions and agencies. WLPGA will prioritise and engage with relevant organisations, in view of agreeing on a “modus operandi” for cooperation and involving them in WLPGA activities.

Separately, Autogas, together with other LPG applications that contribute to improved urban air quality, will be included in a specific campaign under the theme "Exceptional Energy in the City".

OBJECTIVE A4
Increase awareness and positive perceptions of the role of LPG in urban areas, with a detailed focus on Autogas, through the execution of specific communications campaigns.

One of the most significant changes to the outcomes of this strategic review compared to the last is the importance attached to cooperation with the natural gas industry. This was not limited to the International Gas Union, however, given this organisation’s position as the global representative of the natural gas industry, it is the natural counter-party for the WLPGA. To achieve the objective it will be important for WLPGA to clearly explain to IGU the benefits of cooperation and this will be done through participation in IGU committee meetings / publications of joint reports and participation in each other’s events. The creation of a task force of interested members to explore working more closely with the Natural Gas Industry will be considered.

OBJECTIVE A5
Ensure that the International Gas Union recognises the role that LPG plays in gas market development and is referenced in their 2019 – 2021 triennial plan.
LPG is extensively used for crop and fruit drying.
3.2 Goal B - Support the developments of LPG markets

Support to the development of LPG markets includes new markets in developing countries and support to mature or even declining markets in mature markets. Feedback from the strategic review highlighted the following:

- Cooking For Life as a flagship programme enjoys strong support with over 86% of respondents rating the work it is doing as Excellent or Good with 0% rating its work as Poor or Very Poor.

- There is strong support for WLPGA to continue to establish partnerships with similar organisations as well as UN bodies, development banks, multi-lateral institutions and NGOs.

- Autogas (in cities in particular) is seen as among the top three opportunities for the LPG industry and seen as important or very important by almost 70% of the respondents to the online survey. Autogas is clearly a strategic priority for many members in mature markets and this level of importance should be reflected in WLPGA allocation of priorities, time and resources.

The following objectives for Goal B are proposed:

**OBJECTIVE B1**

Support the conversion of an additional 150 million people from using biomass / kerosene to using LPG for cooking.

The Cooking For Life project was launched in 2012 and sets an objective of facilitating the switch of one billion people from cooking with traditional fuels to LPG by 2030. The objective for the period 2017 – 2019 is based on achieving the 2030 goal and will be met through using the mapping exercise conducted in 2016 and working with the Steering Committee to identify one country per year with partner organisations for holding a Cooking For Life workshop together with international organisations. In addition, to support the objective, a three-year C4L communications plan will be prepared to highlight the work of the initiative and of LPG as a solution for clean cooking at a global level.

In order to support further development of LPG markets and in connection with achieving the Cooking For Life objective, WLPGA will work with its members in developing countries to facilitate the creation of three national associations during the period 2017 – 2019 to leverage the WLPGA mission.
WLPGA support to mature markets is often the focus of the regular WLPGA technical network meetings. These network meetings coordinate the preparation of technical studies, which cover specific end-use applications such as power generation. With the support of member working groups, Objective B2 will take the technical studies to another level through identifying barriers to market development and strategies to overcome these barriers. Applications in this context are generic rather than specific branded appliances.

**OBJECTIVE B2**

Support the market growth for three specific applications based on WLPGA technical reports.

Respondents to the review survey felt that WLPGA should do more lobbying on Autogas. There is limited action that WLPGA can directly undertake at a global level but more focus should be given to supporting members in their lobbying activities at national levels to effectively establish government incentives for LPG, through increased knowledge transfer and dissemination of advocacy tools. This objective includes the yearly update of the Autogas Incentive Policies document as a basic tool for knowledge on policies in different countries.

**OBJECTIVE B3**

Encourage the development of new Autogas markets and defend existing Autogas markets through: supporting members with lobbying in three identified countries, and providing ad-hoc support to additional countries upon request and within budget.
3.3 Goal C - Promote compliance with standards, good business and safety practices

The WLPGA vision is to promote the use of LPG to foster a safer, cleaner, healthier and more prosperous world. A key element of this is “safe” and many respondents highlighted the growth in bad practices or poor government policy as a threat to the industry in the coming period. Promotion of good business practices was ranked joint second as the long term objective of the WLPGA.

Specifically the outcome of the review highlighted the following:

- Key long term objective is global enforcement of Good Industry Practices with WLPGA taking a leading role.
- Stronger links needed between WLPGA and regional/country associations.
- Large majority (90%) support for Good Industry Practices promotion.
- Nearly 90% of members believe performance in promoting Good Industry Practices has been good.

The following objectives for Goal C are proposed:

**OBJECTIVE C1**

Represent the WLPGA at the IOPCF HNS meetings, maintaining the observer status throughout the 2017 – 2019 period.

The International Oil Pollution Compensation Fund (IOPCF) Hazardous and Noxious Substances (HNS) Convention aims to ensure adequate, prompt and effective compensation for damage to persons and property, costs of clean up and reinstatement measures and economic losses resulting from the maritime transport of hazardous and noxious substances. In order to protect the interests of the LPG industry, WLPGA has maintained an observer status to the convention. Completion of the objective will involve the maintenance of a separate account for LPG within the Convention and attendance and participation in up to three meetings a year (normally in London) together with additional workshops and the monitoring of shipping incidents and statistics of sea-borne cargoes.

**OBJECTIVE C2**

Revise both the WLPGA Good Business and Good Safety Guidelines and develop Good Practice Guides for at least three specific LPG sectors during the period 2017 - 2019.

The WLPGA guidelines to Good Business and Good Safety Practices in the LPG business are flagship reports for the association. In order to remain relevant, these publications need to be updated on a regular basis. Following an update in the period 2014 – 2016 it is anticipated to update both publications again in the coming period. In addition, in order to address specific areas of concern, one detailed good practice guide will be prepared per year according to the preference of the WLPGA Industry Council.
In order to influence target stakeholders, governments, regulatory bodies etc., WLPGA will continue to organise and fund two workshops per year focusing on good practices. The selection of country and venue for each workshop will be agreed in advance with the WLPGA Industry Council. A key objective of each workshop will be to issue an agreed joint communiqué, with the local association or government representatives, together with an action plan. It is important to note that in each year one of the workshops will be focused on cylinder market regulation and enforcement. This reflects the feedback from the strategic review that highlighted poor understanding, regulation and enforcement of the filling and distribution of cylinders in many countries. This aspect of Objective C3 will continue the work of the Global Cylinder Network (GCN) but with a focus on realising implementation of GCN recommendations in-country.

**Objective C4**

Work towards better harmonisation between selected global standards (ISO), EU standards (CEN) and others (e.g. DOT, NFPA etc.), through prioritisation of their impact on the sector.

Objective C4 is a continuation of the same objective from 2014-2016. The goal of this work is to resolve any conflicts between standards, align the industry on a clear global LPG operational strategy and help to drive efficient and effective practices.

**Objective C5**

Promote diversity in LPG businesses. During the period, the activities of the Women in LPG Network (WINLPG) will lead to an increase of 5% from the current 16.5% of women employed in the industry to 21.5% during the period 2017 – 2019. In addition, the network will have a membership of at least 1,000 individuals by the end of the period. Other areas of diversity in the business e.g. involvement of youth will be investigated.

WLPGA has recognised an opportunity for industry to take actions that can address the issue of improving diversity in the workforce. The priority in the coming three years will be attracting, retaining and developing women in the industry through the WINLPG network. The network’s mission is to support and help empower women in the LPG Industry by leadership, coaching, mentoring and promoting role models and case studies.
3.4 Goal D - Identify innovation and facilitate knowledge transfer

Activities undertaken as part of Goal D in the period 2014 - 2017 were rated as the most important to respondents. The key role of the WLPGA as a knowledge hub comes to the fore with respect to disseminating technology and innovation. In the period 2017 – 2019 these positive aspects need to be taken forward, particularly activities around the promotion of applications. On the other hand training, an element of Goal D in the period 2014 – 2017, was less well perceived and consequently in the coming period the focus will be on preparing training materials for others to use rather than WLPGA conducting training itself.

Summary of main findings from the review as applicable to goal D:

- Knowledge transfer is seen as a critical issue following withdrawal of large companies.
- Lack of LPG applications.
- Insufficient innovation focus, technology development stagnation and need to invest in modern applications.

The following objectives for Goal D are proposed:

**OBJECTIVE D1**

Identify new applications, appliances and enabling innovations and disseminate information to members. Produce two member-only reports per year.

Objective D1 is a continuation of activities that have been carried out through the GLOTEC network. These activities were highlighted by the respondents to the survey as being the most important activity for the WLPGA. During the coming period there will be a focus on leveraging the member network to provide examples of successful innovation processes in the business and to produce member-only reports on specific end-use applications. These may include, but are not limited to: marine, power generation, heavy duty engines, hybrids, SNG and updates of existing reports. Objective D1 will include facilitation of networking and exchange of information amongst members through online tools and other communications means – assisted by an Exchange & Technology Monitoring and Communications Working Group. In order to further the development and commercialisation of appliances, WLPGA will create a new member category – appliance manufacturers, with an objective of reaching 30 new members in the period.

**OBJECTIVE D2**

Maintain and enhance “Exceptional Energy in Action“ – the LPG applications directory including supporting promotional materials, videos, case studies and brochures in conjunction with sponsoring support.

Exceptional Energy in Action was the second most important activity of the WLPGA according to respondents to the strategic review survey (jointly with event organisation) and therefore this should continue into the coming period. In 2017 – 2019 under Objective D2, WLPGA will maintain a web-based directory of LPG applications with all the related data and information: “Exceptional Energy in Action - The LPG Applications Directory“ including its social media support. Use will be made of sponsoring opportunities from members and external resources in the context of a commercialisation plan to cover costs associated with the production of supporting materials, videos, case studies and brochures.
OBJECTIVE D3

Enhance GTC, the annual Global Technology Conference as a prime platform of identification and showcasing of innovation in the LPG industry, by extending the reach of the call for abstracts to educational establishments and research bodies. During the period 2017-2019, the number of abstracts received will increase 10% year-on-year.

The Global LPG Technology Conference which started in 2006 has continued to showcase innovation in the LPG industry on an annual basis at the time of the World LPG Forum. Under Objective D3 this will be enhanced in the coming period with an objective of maintaining at least ten original submissions at each GTC and increasing the number of abstracts received each year by at least 10%.

OBJECTIVE D4

Develop a series of six training modules with trainer’s notes for the industry including the development of a network of trainers based on the existing Good Industry Practice guidelines. A measurable objective will be the successful application of the training modules by at least one country per year through a train-the-trainer programme.

Although training was not perceived as an important activity by the respondents to the strategic review questionnaire, training was highlighted as a way for the WLPGA to mitigate the threat of expertise loss in the industry from the exit of major players. In the coming period, the WLPGA focus will be on preparing training modules for others to use based on existing WLPGA Good Industry Practice guidelines.
3.5 Improvement of the effectiveness of WLPGA

Whilst not identified as being part of a specific goal, the strategic review highlighted areas of potential improvement in the effectiveness of the WLPGA’s delivery on its activities. Principal to this is increasing available resources which can be achieved by developing membership as well as promoting special projects with groups of members. Objectives in this area will be categorised as Objective E.

**OBJECTIVE E1**

To improve further the credibility of WLPGA as the global voice of LPG and to encourage greater openness to market development, the membership of the WLPGA will be increased to at least 300 representing all regions of the world.

The strategic review highlighted lack of resources and lack of member diversity as a weakness. Current membership at the end of 2016 is approximately 240 and therefore this objective implies a net growth in membership of some 20 organisations per year which is a faster growth rate than previously achieved. Objective E1 will attempt to address this and will focus on developing clear member value propositions for target sectors and regions.

**OBJECTIVE E2**

Staff competence development. On an annual basis a review of critical opportunities for competence improvement will be carried out and training programmes assigned, whether individual or group-based. As appropriate, combined training with other WLPGA members or member associations will be sought.

Under French law, a training budget must be established through compulsory minimum contributions to an official agency. This minimum training budget may be supplemented with additional contributions depending on the level of costs incurred.
4. Analysis of funding requirements

4.1 Historical analysis

The WLPGA activities are funded by a combination of member fees, commercial activities (principally the World Forum, regional summits and training) and special projects for members. Fig 4.1 below shows the evolution of total revenue since 2002 which has shown a 7.3% CAGR over the last 13 years, outpacing the increase in operating costs, of which salaries are the most important element. Part of the growth in revenue has come from a growth in the absolute number of members (increase of c. 90% in the period) but also a growth in membership fee which, since 2010 has increased by 3% per year.

---

Fig 4.1 WLPGA revenue vs cost ratios
As a non-profit organisation, the increase in revenue allows a greater investment in projects and this can be seen in fig 4.2 below where, in the period 2010 – 2013, a significant additional investment was made in the Exceptional Energy branding project through drawing down on WLPGA reserves.

**Fig 4.2 Project investments and reserves evolution**
(No profit retained, but more than €4.1 million returned to the industry)

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### 4.2 Member development

Objective B5 sets a target for membership of 300 organisations by 2019. This will be achieved by focusing on development of all categories of membership but specifically, B category (national LPG distributors with annual volumes < 700kTonnes) and C category (equipment and service companies). In addition it is proposed to create a new member category for LPG appliance manufacturers, category D. This category will be priced at a lower level to encourage participation.
With a focus on absolute member growth, it is proposed in the coming period to freeze the price of membership (noting that the French retail price growth index for 2015 stood at just 0.22%).

Based on the above membership development plan and fees, a forward looking three-year budget for the association (excluding commercial revenue from the WLPGA Communications SARL) has been prepared (see appendix 5). This budget is conservative in that it assumes an average escalation of costs p.a. of 3%. See fig 4.4 below.

Fig 4.3 Member development target

Number of Members

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<th>Year</th>
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<th>100</th>
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Discounted association
(member of regional LPG association)
Association member
D category member (appliance manufacturer)
C category member (equipment and service companies)
B category member (vol <700kT/yr)
A category member (vol >700kT/yr)
Multi National member
Industry Council

Fig 4.4 WLPGA budget figures 2017 - 2019 (excluding SARL)

'000 Euros

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<th>Year</th>
<th>0</th>
<th>200</th>
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Association revenue
Project spend
Operating costs
Other costs
Net income
Reserves
5. Organisational Structure

Like many member-based organisations, the WLPGA operates with a small core staff.

Fig 5.1 WLPGA Secretariat

From left to right:

**Autogas Manager**, Cécile Nourigat

**Communications & Marketing Director**, Alison Abbott

**Deputy Managing Director & Director Market Development**, Michael Kelly

**CEO & Managing Director**, James Rockall

**Events Director**, Esther Assous

**Communications Coordinator**, Camille Pieron

**Technical Director**, Nikos Xydas

**Office Manager & Member Relations Manager**, Laurence Poret
In the current structure the staff operates within the larger structure of the membership organisation which includes the Board (elected by the General Assembly), the Industry Council (approved by the Board) and various ad-hoc networks of members under the supervision of the Industry Council.

Fig 5.2 Structure of WLPGA in 2014 – 2016 period

In the current structure, networks include Global Technology Network (GLOTEC), Global Autogas Industry Network (GAIN), Global Cylinder Network (GCN) and Women in LPG Network (WINLPG). These networks, while grouping members with specific important interests, do not cover the full scope of the WLPGA activities. For instance, within this structure there is no formal member engagement in good industry practices or communication where member involvement is through ad-hoc groups with little formal governance.

It is recommended to adopt a structure that is both representative of all the goals agreed upon in the strategic review and fully inclusive of all members while being sufficiently flexible to meet the varying needs of different markets. The solution to this is a matrix structure that has four primary goals intersecting with projects or activities on the vertical axis. Each primary goal will have an Industry Council nominated Chair for the three-year period of the strategic plan. Each project or activity will have a WLPGA secretariat “owner” as coordinator. Each project will intersect with one or several goals depending on the main focus of the activity. Working groups can be created for each project as necessary and these groups will work either remotely or meet physically as necessary.

On regular occasions (for instance in January; at the time of the European LPG Congress in May/June and at the time of the World Forum in September/October) WLPGA will host a “Matrix Day.” A Matrix Day agenda will be prepared, together with the four Chairs, which will focus on a selection of specific projects covering both the needs of the working groups and the geography of the venue (for instance if being held in sub-Saharan Africa there will be a greater focus on Cooking For Life projects and a reduced focus on high-tech applications).

The creation of the matrix will see the dissolution of the existing network groups (GLOTEC, GAIN, GCN and WINLPG) within the formal structure of the WLPGA, although these groups may continue in name if they represent a specific project or working group. The matrix is best expressed visually – see fig 5.3. Where a project intersects the principal goal that it supports, the intersection is highlighted in a bold colour. Where the project intersects secondary goals, a lighter colour is shown. If a project does not have any connection to a specific goal, no colour is shown.
Fig 5.3 The WLPGA Matrix

The matrix enables the WLPGA to achieve several key objectives:

- Map all projects against their respective goals within the three-year period of the strategic plan.
- Fully engage all members in a transparent way with the agreed projects and goals of the WLPGA.
- Allow clear measurement and reporting of progress of projects through to the Industry Council via the goal Chairs.
Fig 5.4 The matrix as a monitoring and reporting tool

The matrix can also serve as a tool for project monitoring and reporting. Fig 5.4 is a demo of how an on-line version of the Matrix might look where, with a mouse click on a project or a goal, key metrics can be presented that can ultimately lead to an assessment of progress of each goal and ultimately progress against the overall strategic plan.
LPG powered buses can substantially reduce air pollution in urban areas.
6. Measurement and reporting

A key element of the strategic planning process within the WLPGA has been to ensure transparency in terms of WLPGA resource allocation to the agreed priorities set by the membership and reporting of progress vs. targets set. In this way the WLPGA can demonstrate the return on investment expected by the membership.

6.1 Measurement

For each three year period the WLPGA agrees, with the members, a set of over-arching goals which respond to the imperatives as seen by both internal and external stakeholders. In the period 2017-2019 these goals are:

A. Demonstrate the benefits of LPG and inform, educate and influence all stakeholders.

B. Support the development of LPG markets.

C. Promote compliance with standards, good business and safety practices.

D. Identify innovation and facilitate knowledge transfer.

For each of these goals, specific measurable objectives are agreed which relate to the priorities emerging from the strategic review. In the period 2017-2019, 19 objectives have been set. On an annual basis, an action plan is agreed with the Industry Council which defines specific activities designed to meet the objectives under each goal. Measurement of the completion of activities leads to an assessment of the completion of each goal. As far as possible objectives are measurable, for instance Objective A3: Hold an annual World Forum with at least 450 delegates covering all costs. In addition, hold at least three self-funded regional summits addressing regional / thematic issues. Measurement of overall completion of objectives takes into account both degree of completion of the activities and the relative budget allocation to the activity. In this way, major projects that involve a large amount of WLPGA resources weigh heavier in the measurement of achievement of objectives.

In order to focus and align the efforts of the WLPGA team with the agreed goals, staff members have variable remuneration elements derived from individual targets linked to completion of objectives.

6.2 Reporting

The three year strategic plan and annual action plans are approved by the WLPGA Industry Council and circulated to all members as well as being posted on the members-only section of the WLPGA web site. Each annual action plan has a list of quarterly targets which are monitored and reported to the Industry Council. Each year at the time of the General Assembly, WLPGA progress vs. objectives are communicated to the membership. In order to further improve the dissemination of progress reporting, quarterly targets will be added to the members only web site in the form of a “dashboard,” allowing rapid communication of progress vs. objectives.
Appendix 1: 
2014-2016 review of performance

In 2014 the WLPGA developed the following Vision and a Mission statement that reflected the perceived trends and drivers of the business at that time.

Vision:

As the authoritative global voice for LPG, the WLPGA promotes the use of LPG worldwide to foster a cleaner, healthier and more prosperous world.

Mission:

A Demonstrate the benefits of LP Gas and inform, educate and influence all stakeholders.

B Support the developments of LP Gas markets.

C Promote compliance with standards, good business and safety practices.

D Identify innovation and facilitate knowledge transfer.

In addition, the WLPGA set out its strategic objectives for the period 2014 - 2016 inclusive. These objectives were linked to achieving the individual goals of the mission statement.

Review of performance

The 2014-2016 strategic plan identified four goals to be achieved over the three year period.
The performance, as measured against the annual targets, is shown in Table 1 below. According to the end-2016 assessment of achievements it is estimated that the four goals to which WLPGA worked in the 2014 - 2016 period had the following levels of completion:

Table 1

<table>
<thead>
<tr>
<th>GOAL</th>
<th>% PROGRESS</th>
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<tbody>
<tr>
<td>A Demonstrate the benefits of LP Gas and inform, educate and influence all stakeholders.</td>
<td>94%</td>
</tr>
<tr>
<td>B Support the development of LP Gas markets</td>
<td>93%</td>
</tr>
<tr>
<td>C Promote compliance with standards, good business and safety practices</td>
<td>100%</td>
</tr>
<tr>
<td>D Identify innovation and facilitate knowledge transfer</td>
<td>88%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>94%</td>
</tr>
</tbody>
</table>

Goal A

Goal A consisted of three principal objectives. The first related to developing and improving internal communications, something which has successfully been completed through the period with revamps to all the principal web sites and newsletters. Significant increase in web views and newsletter opening rates have demonstrated the effectiveness of Objective A1 and this was also reflected in the feedback received during the current strategic review. Objective A2 related to external communications which met all its targets in terms of revamping Exceptional Energy, development of media relations and interactions with external organisations. Nonetheless this is an area of increased focus for the coming period. Finally, Objective A3 related to WLPGA Forums and regional summits. All targets for regional summits (Cartagena in 2014, Seoul in 2015 and Gold Coast in 2016) were exceeded and targets for all three World Forums (Miami 2014, Singapore 2015 and Florence 2016) were met or exceeded. It is important to note that locations for World Forums for the period 2017 – 2019 were also agreed as Marrakech in 2017, Houston in 2018 and Amsterdam in 2019.
Goal B

Spread over six objectives, market development was focused in several areas in the period including: Cooking For Life, Autogas market support, member development and specific, discrete reports. Objective B1, Cooking For Life (C4L) proceeded according to the road map that had been prepared by the C4L Steering Committee and agreed with the Industry Council with a focus on developing partnerships and building the evidence case. Reports on LPG and women, LPG and children and case studies on accelerating the change were completed with partner co-funding. At the end of the period the project began moving into the phase of “championing the issue” with in-country activities to influence stakeholders. Autogas activity proceeded according to plan with a significant revamp to the communications effort, direct support to markets in Australia and Korea, and regular updates to the Autogas Incentive Policy document. Membership development covered by Objective B5 was considered successful with the net addition of 37 new members and seven new countries.

Goal C

Goal C was 100% complete by the end of the period. Focus during 2014-2016 was on maintaining observer status with the IMO as part of the IOPCF HNS meetings which was achieved. Revisions to both the WLPGA good practice guidelines (on safety and business) were completed while the target for in-country workshops (of three in the period) was vastly exceeded with seven having been completed by end-2016.

Goal D

The goal had four objectives. Objective D1 related to the activities of the GLOTREC network which held all planned meetings during the period as well as two reports on two end use applications (heavy duty engines and LPG power generation). Objective D2 related to the development of Exceptional Energy in Action – the LPG applications directory. This objective progressed according to planning. Objective D3 related to training and most of the targets set have been met. Finally, Objective D4 concerned the hosting of the annual Global Technology Conference for 2014, 2015 and 2016, which was exceeded (in terms of number of participants) for all events.

Conclusion

The overall completion of the goals set for the period 2014 - 2016 was c 94%. No account is taken of objectives being significantly exceeded (e.g. good practice workshops). In some cases, objectives have not been easily measurable and the allocation of a completion percentage has therefore been subjective. During the forthcoming strategic plan the WLPGA will endeavour to make objectives measurable where possible.
Appendix 2: List of focus interviewees

Focus interviews were completed by the following organisations / individuals:

<table>
<thead>
<tr>
<th>BUSINESS TYPE</th>
<th>REGION</th>
<th>COMPANY</th>
<th>NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Association</td>
<td>Asia</td>
<td>Japan LP Gas Association</td>
<td>Michio Tan</td>
</tr>
<tr>
<td>Association</td>
<td>Latin America</td>
<td>AIGLP</td>
<td>Jonathan Benchimol</td>
</tr>
<tr>
<td>Association</td>
<td>Europe</td>
<td>AEGPL</td>
<td>Sam Maubanc</td>
</tr>
<tr>
<td>Shipper / trader</td>
<td>Asia</td>
<td>BW LPG</td>
<td>Martin Ackerman</td>
</tr>
<tr>
<td>Integrated Oil Company</td>
<td>Europe</td>
<td>Total</td>
<td>David Rodriguez</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>Asia</td>
<td>SK Gas</td>
<td>John Lee</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>USA</td>
<td>UGI</td>
<td>John Walsh</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>Europe</td>
<td>DCC LPG</td>
<td>Henry Cubbon</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>Europe</td>
<td>Veroniki Holdings</td>
<td>Christos Christofides</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>USA</td>
<td>Blossman Gas</td>
<td>Stuart Weidie</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Europe</td>
<td>Makeen</td>
<td>Eric Batise</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Europe</td>
<td>Ragoasco</td>
<td>Morten Balle</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Global</td>
<td>Prins</td>
<td>Bart van Aarle</td>
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<tr>
<td>Manufacturer</td>
<td>USA</td>
<td>Lehr</td>
<td>Bernardo Herzer</td>
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<tr>
<td>National Oil Company</td>
<td>Africa</td>
<td>NNPC</td>
<td>Adebayo Ibirogba</td>
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<tr>
<td>Media</td>
<td>Europe</td>
<td>Argus</td>
<td>Nick Black</td>
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<td>Observer</td>
<td>Global</td>
<td>IGU</td>
<td>Mats Fredrickson</td>
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<tr>
<td>Non-member</td>
<td>Global</td>
<td>GACC</td>
<td>Radha Muthia</td>
</tr>
<tr>
<td>Non-member</td>
<td>Global</td>
<td>Morris &amp; Chapman</td>
<td>Simon Leysen</td>
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<tr>
<td>Non-member</td>
<td>Global</td>
<td>Renault</td>
<td>Loic Bouttier</td>
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<tr>
<td>Non-member</td>
<td>Global</td>
<td>MCI</td>
<td>Philippe Fournier</td>
</tr>
<tr>
<td>National Oil Company</td>
<td>Asia</td>
<td>Indian Oil Corporation</td>
<td>Shailendra Sharma</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>Global</td>
<td>SHV</td>
<td>Andrew Ford</td>
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<tr>
<td>Manufacturer</td>
<td>Global</td>
<td>Cavagna</td>
<td>Nikki Brown</td>
</tr>
<tr>
<td>Distributor / marketer</td>
<td>Africa</td>
<td>Oryx</td>
<td>Blaise Edja</td>
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<tr>
<td>Distributor / marketer</td>
<td>Australia</td>
<td>Elgas</td>
<td>Cameron Ure</td>
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<td>Distributor / marketer</td>
<td>Asia</td>
<td>Aygaz</td>
<td>Ercüment Polat</td>
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<tr>
<td>Association</td>
<td>USA</td>
<td>PERC</td>
<td>Grace Willis</td>
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<td>National Oil Company</td>
<td>Asia</td>
<td>Pertamina</td>
<td>Pak Bambang</td>
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<td>Association</td>
<td>Asia</td>
<td>Japan LPG Centre</td>
<td>Makoto Arahata</td>
</tr>
<tr>
<td>Integrated Oil Company</td>
<td>Global</td>
<td>Repsol</td>
<td>Armando Viçoso</td>
</tr>
</tbody>
</table>
Appendix 3:
Focus interview questionnaire

Background
The World LPG Association (WLPGA) is a not-for-profit association based in France with some 250 members operating in over 125 different countries. As the authoritative, global voice for LPG, the WLPGA promotes the use of LPG globally to foster a cleaner, healthier and more prosperous world.

The WLPGA holds regular three year Strategic Planning reviews with its membership to identify major changes in the LPG environment and to have input to the planning process for the WLPGA.

In 2013, a Strategic Plan Review was held which defined a set of objectives for the three year period from 2014 until end 2016, to which all activities in the annual action plans for 2014, 2015 and 2016 have been linked.

The review resulted in the following Vision and Mission Statement:

Vision:

As the authoritative global voice for LPG, the WLPGA promotes the use of LPG worldwide to foster a cleaner, healthier and more prosperous world.

Mission:

- Demonstrate the benefits of LPG and inform, educate and influence all stakeholders.
- Support the development of LPG markets.
- Promote compliance with standards, good business and safety practices.
- Identify innovation and facilitate knowledge transfer.
Since the last review, the global energy industry and indeed the context within which the industry operates has been undergoing major change coming from, amongst others:

• Increased LPG production.

• Significant drop in energy prices.

• Changing supply routes.

• A shift in focus from civil society institutions and policy makers. Environmental issues such as air quality, health, and climate change etc. are increasingly recognized as important, not just CO₂ or GHG emissions.

• Household air pollution has also come to the fore and studies from major intergovernmental organisations such as World Health Organization (WHO) have highlighted how harmful household and street air pollution is to human health.

• Recent issues related to the use of diesel in vehicles and challenge for OEM’s of complying with more and more demanding emissions regulations have changed the scene.

In the current period, the LPG industry has also continued to change. The trend of integrated oil companies exiting the business, which began with Exxon Mobil and Chevron, continued with the exit of Shell LPG and BP LPG in 2012, and is persisting in part with the downsizing of the LPG businesses in some of the remaining integrated companies. With the exiting of these companies goes also the expertise built up over generations, especially in areas such as safety standards and business practices. Important new multi-national players continue to emerge, some with a background in trading or logistics. Some of these players are not yet members of the WLPGA.

These changes will impact the global LPG industry, presenting both threats as well as opportunities for the WLPGA. For example, the increased fragmentation that is expected may lead to a greater need for a global Association that can broker knowledge. At the same time, the loss of established multi-nationals will impact national and regional associations through reduced access to expertise and other resources. Greater cooperation with and between regional and national associations will continue to be important in the coming years.

These developments present great opportunities for LPG, however, to seize them, the industry needs to stimulate demand. This can come from effecting policy changes to leverage LPG’s clean-burning qualities as well as ensuring safe, modern, competitive, reliable and efficient appliances for LPG are available.

The global LPG industry remains broadly split between mature and developing markets and WLPGA needs to carefully position its future activities so as to provide value to both. In a time of greater focus on cost and value, WLPGA must continue to respond to the specific needs of its member groups rather than providing only common industry-wide products and services. We must also review the structure of our organisation, its networks and committees and ensure that it efficiently meets the needs of the membership.

At the beginning of 2016, a new strategic plan review will be carried out to cover the next three year period until end 2019.
Questions

You have been identified as an important stakeholder in the LPG Business. Your answers to the following questions will help the WLPGA in determining its most appropriate activities in the coming three year period. This questionnaire will be used as the basis for an interview with the WLPGA or its nominated representative. The answers to these questions will be treated anonymously.

1 | What do you see as the most critical issue or issues facing the LPG industry over the next three to five years?

2 | What do you see as the key long term objectives for the WLPGA?

3 | The current Vision of the association is: “As the authoritative global voice for LPG, the WLPGA promotes the use of LPG worldwide to foster a cleaner, healthier and more prosperous world”
   Do you agree with this Vision and if not please elaborate

4 | The current Mission of the association is:
   • Demonstrate the benefits of LPG and inform, educate and influence all stakeholders.
   • Support the development of LPG markets.
   • Promote compliance with standards, good business and safety practices.
   • Identify innovation and facilitate knowledge transfer.
   Do you agree with this Mission and if not please elaborate, is there something we need to do more of or less of?

5 | In the current strategic plan how has the WLPGA performed vs its vision and mission?

6 | What do you see as the major strengths of the WLPGA?

7 | What do you see as the major weaknesses of the WLPGA?

8 | How should the WLPGA overcome these weaknesses?

9 | How should the WLPGA be perceived externally? How is it actually perceived?

10 | How should the LPG industry be perceived externally? How is it actually perceived?

11 | What do you see as major opportunities for the LPG industry in the coming three years?

12 | What do you see as major threats to the LPG industry in the coming three years?

13 | How can the WLPGA take advantage of these opportunities or mitigate any specific threats?

14 | How can the WLPGA add more value to the industry?

15 | How can the WLPGA add more value to your organisation?

16 | Should WLPGA execute special projects for selected members who would provide joint additional funding?
   If so do you have recommendations of topics or geography of such cooperation?

17 | In recent years the WLPGA has developed partnerships with organisations inside (e.g. AEGPL) and outside the industry. What new partnerships should we develop and how?

18 | During the 2014-2016 Strategic Plan, membership fees increased annually by 3% to cover the increased scope of work of the WLPGA. Do you believe this was appropriate?

19 | What is the value of WLPGA events (World LPG Forum, Regional Summits) to your organisation?

20 | What are the strengths and weaknesses of WLPGA events?

21 | WLPGA has four member networks (GAIN, GLOTEC, GCN and WINLPG) designed to engage members and leverage member (human) resource in WLPGA activities. What are the strengths and weaknesses of these networks?

22 | Please add any additional comments
Appendix 4: Benchmarking study of global associations
Objective
The goal of this report is to analyse specific elements of other industry associations that have a similar profile to the WLPGA in order to gain insight into their fee structures, benefits and services offered. In doing this we hope to ensure that in the context of the 2017-2018 Strategic Review, WLPGA can benchmark its fees and services with similar organisations and therefore continue to offer excellent added value to its global membership.

Methodology
Industry associations similar to WLPGA were identified on the basis of the following criteria:
- International or regional associations were considered while national or local associations were excluded.
- Associations related to the provision of energy or commodities were prioritised.

The associations selected were researched via their websites to ensure relative comparability with WLPGA. A variety of criteria were considered for this report including: numbers and geographic spread of members, profiles of the members’ activities and interests, membership categories, and variety of services offered by the associations to members.

The areas examined and reported on are:
- Membership categories and fees.
- Overall scope of services and benefits offered for members.
- Special activities or services that could be of interest to WLPGA as templates.

Associations selected
The following associations were initially selected as being potentially similar in size and scope to WLPGA.

1 I International Fertilizer Association (IFA): www.fertilizer.org
2 I International Hydropower Association (IHA): www.hydropower.org/
3 I World Coal Association (WCA): www.worldcoal.org/
4 I World Nuclear Association (WNA): www.world-nuclear.org
5 I Natural Gas Vehicle Knowledge Base (NGV Global): www.ingv.org
6 I International Gas Union (IGU): www.igu.org
7 I The Global Wind Energy Council (GWEC): www.gwec.net
8 I World Steel Association (worldsteel): www.worldsteel.org
9 I World Petroleum Council (WPC): www.world-petroleum.org
10 I World Road Association (PIARC): www.piarc.org
Conclusions

Upon examination of the selected ten associations, it was evident that they share many similarities to WLPGA and each other as membership associations representing specific industries or sectors. However, there are also noteworthy differences in scopes of activity, services offered to members, membership profiles and fees. Some such as the IFA, worldsteel, WNA and to a lesser extent WCA are without question the global voice of their respective industries and work closely with an active membership to set the industry strategic direction. They also extend a range of services and benefits to members including offering baseline industry statistics, working groups on issues of interest, and networking opportunities. In all of these respects they are much like WLPGA.

WPC and PIARC are not traditional industry associations like most of the others. They are advocacy bodies that promote the benefits of a specific broad sector comprising many industries and are structured slightly differently in terms of revenue streams and mission.

Many of these organisations hold annual, biennial or even triennial industry conferences that are heavily attended and considered premier events within the industry. They also usually constitute an important stream of revenue and credibility for those groups. For example, the IFA event in 2016 will be the 84th edition of its annual conference and it is without question the biggest event on the global fertilizer industry’s calendar.

All these organisations are active in representing their industries in a number of national, regional and intragovernmental policy forums with particular emphasis on environmental issues, which depending on the institution and sector will focus on climate change, sustainable development, or increasingly clean air. To that end, they undertake lobbying, publish material to improve decision makers’ understanding of their industries and organise events designed to influence opinions.

Where these organisations differ most is in internal governance structures, which was not part of this analysis, and membership categories and fees which range from a stated maximum of £33,000 for IHA at the top end to €29 at the bottom end for PIARC.

However, it is important to note that many of these organisations base membership fees on a potential member’s size and scale of activity and do not publish costs of membership on websites or in promotional material, indicating that the fees are substantial.

Many have three to five different categories and sub-categories of membership with NGV Global acting as an outlier with ten. Almost all offer the possibility for individuals, other associations, academic institutions, government bodies and R&D organisations to join at discounted rates.

As part of this analysis, we attempted to gather information on membership costs and in a surprising number of cases were rebuffed indicating that fees structures are closely guarded. It is not clear why this is the case.

IFA, IHA, WPC, IGU, and worldsteel, each have award programmes usually coinciding with their industry conferences that seek to reward innovation and promote the industry. These award programmes appear to be effective and eagerly followed.

While training is part of their mission for some of the groups examined, only the WNA has a facility as part of its internal structure that is designed to train nuclear professionals and set standards for the industry.
International Fertilizer Association (IFA)

Introduction
The International Fertilizer Industry Association (IFA) is a not-for-profit organisation representing the global fertilizer industry on issues related to the promotion of plant nutrient, improvement of the operating environment of the member companies and the collection of industry information. IFA has more than 500 members in some 85 countries. About half of the membership is based in developing countries. IFA member companies represent all the activities related to the production and distribution of every type of fertilizer, their raw materials and intermediates. IFA’s membership also includes organisations involved in agronomic research and training with regard to fertilizers.

Mission
IFA’s mission is to:
• Actively promote efficient and responsible production and use of plant nutrients to maintain and increase agricultural production worldwide in a sustainable manner.
• Improve operating environments of the fertilizer industry in the spirit of free enterprise and fair trade.
• Collect, compile and disseminate information, and provide a discussion forum for members and others on all aspects of the production, distribution and consumption of fertilizers, their intermediates and raw materials.
• Recognising that crop nutrition is just one element of sustainable agriculture and rural development, IFA and its members seek to work with other stakeholders throughout the agricultural value chain to identify and implement holistic, integrated ways to meet the world’s food, feed, fibre and bioenergy needs.
• Influencing the formation of public policy relevant to crop nutrition and soil fertility management.

International Fertilizer Association (IFA) at a glance

<table>
<thead>
<tr>
<th>Website:</th>
<th><a href="http://www.fertilizer.org">www.fertilizer.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Founded in:</td>
<td>1927</td>
</tr>
<tr>
<td>Headquartered in:</td>
<td>Paris</td>
</tr>
<tr>
<td>Number of members:</td>
<td>525</td>
</tr>
<tr>
<td>Countries represented:</td>
<td>&gt;85</td>
</tr>
<tr>
<td>Fees:</td>
<td>min free, max is dependent</td>
</tr>
</tbody>
</table>

Membership categories and fees
There are four main categories of membership in IFA: ordinary, affiliate, associate, and correspondent.

Ordinary membership: Is reserved for companies or organisations that produce or distribute fertilizer materials. There are four main categories of membership in IFA: ordinary, affiliate, associate, and correspondent.
• Fees are a minimum of €4,750 there is no maximum fee.

Affiliate membership: Includes international, national or non-commercial, non-profit making associations of entities which are Ordinary Members. As well as not-for-profit governmental or intergovernmental organisations and private or public research institutes engaged in work recognised by the Board of Directors as beneficial to the objectives of the association.
• Membership is on a complimentary basis but IFA reserves the right to tailor its services to Affiliate members and can limit access to certain services.

Associate membership: Is reserved for companies or organisations which do not produce fertilizers but which are involved in associated activities such as trading, shipping, marketing, engineering, distribution, construction, among others. It is also open to companies which manufacture trace element, soil conditioning and organic or specialty fertilizer products.
• Fees are a minimum of €5,915 and a maximum of €17,745.
Correspondent membership: Is reserved for retired executives of any entity that was a member of the association at the time of his/her retirement and upon approval of their application by the Board.

- Fees are on an individual basis of €150.

Services to members
IFA’s main activity is to provide information about the industry worldwide, especially through conferences and meetings and the exchange of non-commercial information in the form of statistics and publications, questions of general interest, such as environment and safety, best management practices, etc. IFA also offers members industry emissions benchmarking, technical information, a members only website, conferences reserved for members, peer contact, external issues management and policy guidance. Part of IFA’s mandate is to represent the fertilizer industry with regard to a number of international organisations including UN bodies and development agencies.

Awards: IFA offers the “IFA Norman Borlaug Award” every year, which recognises individuals whose contribution in crop nutrition knowledge transfer has been most outstanding. The award is given out at the annual conference, with the recipient receiving €10,000. IFA also offers the “Green Leaf Award” every two years to a deserving member company of Excellence in Safety, Health and Environment. The recipient will be invited to the Global Safety Summit to receive the award and participate in a roundtable discussion.

Level of Staffing
Board and Executive Board: IFA is managed by its Board of Directors, composed of senior representatives of different companies from different regions of the world. The number of Board members per region is calculated according to that particular region’s share of global fertilizer consumption and production, as well as its share of membership fees of IFA’s total membership fees.

Finance Committee: The role of the Finance Committee is to guide and manage, under the supervision of the Board of Directors, the finances of the association.

Secretariat:
Director Generals Office
- Director General
- Member services coordinator and Executive Assistant to the Director General

Agriculture Service
- Senior Director
- Project coordinator, Technical & SHE and Agriculture Services
- Market Analyst
- Policy Analyst

Production and International Trade Service
- Senior Director
- Assistant
- Coordinator, PIT Statistics
- Phosphate products Market Analyst
- Potash and Sulphur Market Analyst

Technical & SHE Service
- Director
- Project Coordinator, Technical & SHE and Agriculture Services

Communications and Public Affairs Service
- Director
- Communications Specialist
- Communications Assistant

Conference Service
- Director
- Conference Planner
- Communications Specialist

Administration
- Director
- Senior Accountant
- Accountant

Information Technology Service
- Director
- Assistant I.T. Service
International Hydropower Association (IHA)

Introduction
The International Hydropower Association (IHA) addresses the role of hydropower in meeting the world’s growing water and energy needs as a clean, renewable and sustainable technology. IHA has members in more than 80 countries, including over 100 corporate and affiliate members working across sectors such as electricity generation, water management, construction, engineering and related industries. IHA is a not-for-profit, non-governmental and mutual association of organisations and individuals. Its membership is open to all those involved in hydropower.

Mission
To advance sustainable hydropower by building and sharing knowledge on its role in renewable energy systems, fresh water management and climate change solutions through:

- Advancing policies and strategies that strengthen the sector’s performance.
- Building a vibrant, inclusive and proactive hydropower community.
- Creating an open, innovative and trusted platform for knowledge.
- Increasing awareness of the role hydropower can play in sustainable development as an important source of renewable energy.

Membership categories and fees
There are 4 main categories of membership in IHA: Platinum Corporate, Gold Corporate, Silver Corporate and Individual Members.

Platinum Corporate: Hydropower sector leaders actively engaged in dialogue on the future of hydropower.
- Fees are £33,000.

Gold Corporate: Major hydropower companies that are committed to supporting the future of the sector.
- Fees are £13,200.

Silver Corporate: Companies with a portfolio or interest in the hydropower sector that support IHA’s mission.
- Fees are £3,300.

Individual Members: Independent specialists and students working or interested in hydropower and the renewable energy sector.
- Fees are £110 (reduced rates available).

Services to members
Benefits to members include knowledge and tools for sustainable hydropower practices, information on latest opportunities and policy developments in the sector, networking opportunities with leading hydro companies, utilities, government agencies and independent experts, participation in working groups to address specific topics, opportunity to shape future IHA strategy and activities, ensuring a strong and credible voice for the hydropower sector. IHA is also active in representing the hydropower sector in various international discussions and forums with a heavy emphasis on issues of sustainable development and renewable energies.
Awards: Every two years the IHA, along with UNESCO's International Hydrological Programme, award the “Blue Planet Prize” to a hydropower scheme that demonstrates excellence in sustainability, or provides significant improvement of the manner in which projects are developed in a country or region. IHA launched the “Mosonyi Award for Excellence in Hydropower” in 2015, which recognizes individual contributions to a commitment or initiative that has had major impact, a specific hydropower project, or an aspect of hydropower sustainability or a broad-ranging initiative. Also launched in 2015 is the “Young Researcher Award” to recognize and reward emerging talent in the hydropower sector.

Level of Staffing
Board of Directors: The IHA is governed by a Board that comprises an international group of experts, bringing together high-level experience and different international perspectives of hydropower.

Secretariat:
Chief Executive

Operations and Membership
- Operations Director
- Assistant Accountant

Hydropower Development
- Technical Director
- Development Director
- Communications Director
- Hydropower Sector Analyst
- Programme Communications Officer
- Programme Researcher

Sustainability
- Sustainability Director
- Senior Sustainability Specialist
- Sustainability Specialist
- Sustainability Support Officer

China National Office
- China National Liaison Officer

South American Regional Office
- South American Regional Liaison Officer

Administration
- Director
- Senior Accountant
- Accountant

Information Technology Service
- Director
- Assistant I.T. Service

Revenue

<table>
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<th>Principle Revenue Streams:</th>
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<tr>
<td>Membership fees</td>
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<tr>
<td>Project funding</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

Every second year, IHA organizes an industry congress, which might generate an additional £1.0m in the form of sponsorship and registration fees.
World Coal Association (WCA)

Introduction
The World Coal Association (WCA) is a non-profit, non-governmental association that represents the coal industry. The WCA undertakes lobbying, organizes workshops, and provides coal information to decision makers in international energy and environmental policy and research discussions, as well as supplying information to the general public and educational organizations on the benefits and issues surrounding the use of coal. It also promotes clean coal technologies.

Mission
• Influencing and engaging: strengthen their influence by engaging global thought leaders and policy makers in rational, data driven debate to position the coal industry as responsible and progressive.
• Powering economies: demonstrate that coal plays an indispensable role in addressing energy poverty, supporting urbanization and delivering economically competitive energy to support modern economies in developed and developing countries.
• Meeting environmental challenges: demonstrate that global climate ambitions can only be achieved with significant international support for cleaner coal technologies.
• Building sustainable societies: demonstrate that coal production and use contributes to the development of prosperous and sustainable societies.

Membership categories and fees
There are two categories of membership in WCA: Corporate and Associate.

Corporate Members: Are companies engaged in the production, sale or use of coal, or manufacture of equipment used for the same.

Associate Members: Are not-for-profit industry associations, research bodies and other stakeholders who can join the WCA for a nominal fee.

Fees: Annual fees for membership to WCA are determined by the size, scale and location of the prospective member.
Services to members

- Voice: members play a pivotal role in shaping the future of the global coal industry. WCA has been influencing policy at the highest level for almost 30 years. Members can participate in committees and networks to determine our programme of work.

- Information: regular policy briefings, media updates, a members-only area of the WCA website, policy workshops and the expertise of the team mean you have access to the highest level of information on the global coal industry.

- Events: WCA holds prestigious, invitation-only events, bringing together policymakers, thought-leaders and industry figures who shape the operating environment. Without access to WCA you do not have access to these meetings.

- Network: WCA gives you opportunities to build relationships and exchange ideas and challenges with peers worldwide in your industry.

- Research: WCA Strategic Research Institute in Beijing carries out a research programme directed by WCA Members. This research is made available to all WCA Members.

- Promotion: WCA promotes the work of its members through its website and social media channels. The WCA encourages all Members to interact and provide us with material we can use on these forums.

Levels of Staffing

WCA is managed by leadership team composed of a Chair, a Chief Executive and three Vice Presidents. There is also an Executive Committee made up of what appears to be seconded executives from the industry. There is no further information available on Secretariat staffing of hydropower.
World Nuclear Association (WNA)

Introduction
The World Nuclear Association is the international organisation that promotes nuclear power and supports the companies that comprise the global nuclear industry. It seeks to promote the peaceful worldwide use of nuclear power as a sustainable energy resource for the coming centuries. Specifically, the WNA is concerned with nuclear power generation and all aspects of the nuclear fuel cycle, including mining, conversion, enrichment, fuel fabrication, plant manufacture, transport, and the safe disposition of spent fuel. WNA Members are responsible for well over 70% of the world’s nuclear power as well as the vast majority of world uranium, conversion and enrichment production.

Mission
To promote a wider understanding of nuclear energy among key international influencers by producing authoritative information, developing common industry positions, and contributing to the energy debate.

<table>
<thead>
<tr>
<th>World Nuclear Association (WNA) at a glance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website: <a href="http://www.world-nuclear.org">www.world-nuclear.org</a></td>
</tr>
<tr>
<td>Founded in: 2001</td>
</tr>
<tr>
<td>Headquartered in: London</td>
</tr>
<tr>
<td>Number of members: 173</td>
</tr>
<tr>
<td>Countries represented: &gt;30</td>
</tr>
<tr>
<td>Fees: Dependant</td>
</tr>
</tbody>
</table>

Membership categories and fees
There are three types of memberships for WNA: Supplier, Generator and General.

Supplier membership: A corporate or government body engaged (or intending to engage in) the production, processing, conversion or enrichment of uranium for use in civil nuclear power plants.

Generator membership: A corporate or government body that is using (or intending to use) nuclear fuel for power production.

General Member: A corporate or government body, or a research or educational institution that falls outside the definition of eligibility of producer or consumer. General members may be either commercial or noncommercial.

Fees: The annual subscription fee for a member is based on its size and scale of activity. Upon receiving an inquiry or application, the WNA Secretariat determines the fee according to standard criteria and informs the candidate organisation accordingly. The fee structure provides, in many cases, for significant discounts for organisations located in countries outside the OECD.
Services to members

- The primary engine of WNA activity is through the “working groups” on various issues important to the industry. Composed of industry experts and staffed by the WNA secretariat, these groups cover a full range of topics from the nuclear fuel market, to trade issues, to waste management, to climate change.
- WNA also hosts the annual WNA Symposium in London which features distinguished industry participants and is considered the premier conference on the world nuclear industry agenda.
- WNA together with the IAEA, WANO and the OECD’s Nuclear Energy Agency hosts the World Nuclear University (WNU). Located in London, the WNU is a worldwide network of leading institutions of nuclear learning, supported by key multinational nuclear organisations. The WNU’s essential aim is inter-institutional cooperation to enhance nuclear coursework and to establish widely accepted global standards in academic and professional qualification.
- WNA is heavily involved in advocacy work at a national, regional and international level on issues impacting the industry and has numerous partnerships with international business organisations.

Level of Staffing

Board of Management: Fulfills all statutory duties pertaining to the organisation’s governance, sets policies and strategic objectives acting on proposals from the Director General.

Secretariat: The World Nuclear Association is made up of an international Secretariat of 30 people, covering a broad range of expertise and experience. Led by the Director General, the Secretariat is composed of five departments: Industry Cooperation, Information Management, Strategic Communication, Administration and Finance, and World Nuclear University.
Natural Gas Vehicle Knowledge Base (NGV Global)

Introduction
The Natural Gas Vehicle Knowledge Base (NGV Global) was established in 1986 to provide the NGV industry with an international forum and to foster growth, safety, product development and policy formation. In June 2010, NGV Global changed its name from the International Association for Natural Gas Vehicles (IANGV) to NGV Global, to differentiate it from the many international NGV associations that have flourished in recent years, and to more appropriately represent its global mission and objectives.

Mission
- Government lobbying and policy assistance.
- Providing industry information to members and stakeholders.
- Standards development and dissemination.
- Standards harmonisation.
- Organising industry conferences, including their own held every two years.
- Collecting relevant statistical data.
- Facilitating technical information exchange.
- Marketing and industry awareness activities.

Membership categories and fees
There are six categories of membership in NGV Global with Annual fees range from a minimum of NZ $150 to a maximum of NZ $2,500:

- Commercial entities
- Governments
- Industry and associations
- Academic or research organisations
- Individuals
- Students or retired professionals

Services to members
NGV Global operates in coordination with regional associations working in the natural gas vehicle arena. NGV Global plays the role of harmonising the information from the industry at a global level. Joining the NGV Global gives members a say in industry development issues as well as access to: discounts for NGV Global and affiliated conferences and exhibitions; discounts on NGV Global publications and reports; eligibility for listing in the Members’ Directory; eligibility for Council and committee memberships. The organisation also provides members with access to numerous reports and papers on issues of concern to the industry including statistics, international standards, and environmental issues.

Level of Staffing
NGV Global is overseen by a Global Board of Directors is appointed by a combination of elected and automatic entitlements (depending on the level of membership). The Secretariat is composed of an Executive Director and a Business Manager.
International Gas Union (IGU)

Introduction
The International Gas Union (IGU) is a worldwide non-profit organisation aimed at promoting the political, technical and economic progress of the gas industry. The Union has more than 140 members worldwide on all continents, representing approximately 97% of the world gas market. The members of the IGU are national associations and corporations within the gas industry worldwide. IGU encourages international trade in gas by supporting non-discriminatory policies and sound contracting principles and practices, promoting development of technologies which add to the environmental benefits of gas and further enhance safe production, transmission, distribution and utilisation of gas.

Mission
- IGU is the key and credible advocate of political, technical and economic progress of the global gas industry, directly through its members and in collaboration with other multilateral organisations.
- IGU works to improve the competitiveness of gas in the world energy markets by promoting transparency, public acceptance efforts, and the removal of supply and market access barriers.
- IGU seeks to collaborate with governmental agencies and multilateral organisations to demonstrate the economic, social and environmental benefits of gas in the global energy mix.
- IGU supports and facilitates the development of new technologies and best practices, while emphasizing sound environmental performance, safety, reliability and efficiency across the entire value chain.
- IGU maximizes the value of its services to members and other stakeholders.

Membership categories and fees
There are two categories of membership in IGU: Charter members and Associate members.

Charter Members: The gas industry of a country or of a geographical area is represented with IGU by one charter member considered to be the most representative gas entity of the country concerned.

Associate Members: Any entity owning gas related assets or having an interest in advancing the global gas industry can become an associate member.

Services to members
- Networking and professional development: members are offered easy contacts to gas specialists and useful business contacts worldwide, creating meeting places for gas professionals and providing a unique international forum for personal and professional development.
- Promotion and marketing: IGU ensures top class contacts with companies and organisations. It influences the way that gas is promoted in different parts of the world and attracts companies seeking an international arena.
- Exchange of information: IGU offers the latest knowledge about technological and regulatory developments in the gas sector in different parts of the world through its publications, website and participation in committees.
Awards: IGU considers energy efficiency one of the most important ways of achieving a more sustainable energy future, or reducing greenhouse emissions, enhancing security of supply and reducing energy related costs. Therefore, IGU awards The Global Gas Award every three years for best paper for energy efficiency and best paper for new ideas and projects.

Level of Staffing
Council/Management Team:
- President
- Vice President
- Immediate Past President
- Vice Chair
- Secretary

Coordination Committee:
- Chair

Secretariat:
- Secretary General
- Director
The Global Wind Energy Council

Introduction
The Global Wind Energy Council (GWEC) is the international trade association for the wind power industry. It was established to provide a credible and representative forum for the entire wind energy sector at an international level. It is a member-based organisation that represents the entire wind energy sector. GWEC works at the highest international political level to create a better policy environment for wind power and to help advocate new policies to help wind power reach its full potential in as wide a variety of markets as possible.

Mission
To ensure that wind power establishes itself as the answer to today’s energy challenges, providing substantial environmental and economic benefits.

- To communicate the benefits of wind power to national governments, policy makers and international institutions.
- To provide authoritative research and analysis on the wind power industry in more than 80 countries around the world.
- To work with governments to give them transparent information about the benefits and potential of wind power, enabling them to make informed decisions about national energy policies.
- To support the collaboration between policy makers in different countries to help them share best practices and experiences in adding clean power to their energy mix.

Membership categories and fees
There are three categories of membership in GWEC: Corporate members, Association members, and Individual members.

Corporate Members: This is specified for corporations with a specific annual turnover.
- Fees are a minimum of €1,200 and maximum of €36,000.

Association Members: Specified for not-for-profit organisations.
- Fees are a minimum of €0 and maximum of €10,800.

Services to members
- A board seat.
- Potential speaking slots in GWEC events.
- Access to webinars and training events.
- Introductions to key companies in emerging markets.
- Consultancy on approach to doing business in markets.
- GWEC newsletter.

- Minimum 10% discounts on booths at GWEC events.
- Invitations to member receptions or events.
- Discounts with GWEC media partners.
- Free listing of events in GWEC communications and listing of organisation or name on the GWEC website.

Levels of Staffing
- Chair
- Secretary General
- Communications Director
- Marketing and Event Manager
- Events and Business Development Manager
- Policy and Global Projects Director
- China Director
- Communication, Events and Office Assistant
World Steel Association

Introduction
The World Steel Association (worldsteel) is the international trade body for the iron and steel industry. It is one of the largest and most dynamic industry associations in the world. The association represents over 150 steel producers (including nine of the world’s ten largest steel companies), national and regional steel industry associations and steel research institutes. World Steel Association members represent around 85% of world steel production. The purpose of the association is to promote steel and the steel industry to customers, the industry, media and the general public.

Mission
• Worldsteel acts as the focal point for the steel industry.
• Worldsteel provides global leadership on all major strategic issues affecting the industry particularly focusing on economic, environmental and social sustainability.
• Worldsteel promotes steel and the steel industry to customers, the industry, media, financial markets and the general public.
• Worldsteel assists its members to develop the market for steel, managing major projects in a range of industry sectors.

Membership categories and fees
There are three categories of membership in worldsteel: Regular, Associate and Affiliate.

Regular Members: Produce at least two million short tons of raw steel per annum and operate as independent commercial enterprises. State-controlled companies must be free to make their own economic and investments decisions and operate in a market based economy.
• Fees are minimum €5,000 and maximum is dependent on tonnage.

Associate Members: Any raw steel producing company, other than those qualified to be a regular member.
• Fees are fixed at €1,325 per annum.

Affiliate Members: Steel and steel-related industry associations, federations and steel research organisation are eligible to join as affiliated members.

Services to members
• Members have access to the latest technical and economic data on industry trends and performance affecting the steel industry through the member-only extranet.
• Membership provides the opportunity to obtain member-only data, reports, publications and authoritative works on specialist subjects.
• Members are given the opportunity to become involved at an international level in common market development programmes and initiatives.
• Membership also offers the possibility of networking with other steel industry professionals from around the world at meetings, events, and the annual conference.
• Members have access to the latest technical information affecting the industry.
Level of Staffing

Board of Directors: The world of worldsteel is overseen by its members through the Board of Directors. The Board is composed of the Chair or CEO’s of member companies. Executive Committee: Elected by the Board each October, the Executive Committee oversees worldsteel’s day to day work. It is made up of board members and worldsteel’s Director General.

Secretariat:
Director General’s Office
- Director General
- Executive Assistant

Industry Excellence
- Director
- Head of Raw Materials
- Head of Construction Coalitions
- Head of Environment and Climate Change
- Head of Technology
- Manager of Safety Technology and Environment

Communications and Public Policy
- Director
- Manager, Extranet
- Manager of Communications and Media Relations
- Publications and Online Manager
- Communications Administrator
- Head of Product and Sustainability
- Life Cycle Assessment Specialist
- Manager of Sustainability

Economic Studies and Statistics
- Director
- Manager, Economic Studies, Analysis and Statistics
- Manager, Economic Studies, Steel Industry Statistics and Strategic Analysis

Steel University
- Director
- Manager

World Autosteel
- Director
- Advisor
- Communications Manager

Finance, I.T. and Office Management
- Director
- Manager of Administration Services
- Manager of Accounting
- Manager of Office and Reception
- Administrative Assistant

Events and Administration
- Executive Assistant
- Manager of Conference and Events
- Assistant

Human Resources and Member Services
- Head of Human Resources, Legal and Membership Services
- Manager of Membership and Business Development

International Stainless Steel Forum
- Secretary General
- Assistant
- Administration and Communications Manager
- Director of Economics, Statistics and Long Products
- Market Development Manager
World Petroleum Council (WPC)

Introduction
The World Petroleum Council (WPC) is a non-advocacy, non-political organisation with charitable status in the U.K. and has accreditation as an NGO from the United Nations. The WPC is dedicated to the promotion of sustainable management and use of the world's petroleum resources for the benefit of all. In their efforts to promote sustainable management, WPC holds congresses and conferences, publishes and distributes educational materials to schools and universities, maintains electronic libraries to provide public access to papers and research documents, and promotes training courses, scholarship grants and awards.

Mission
The WPC is the only organisation representing the global oil and gas community. The Council’s core value and purpose centers on sustaining and improving the lives of people around the world, through:
- Enhanced understanding of issues and challenges.
- Networking opportunities in a global forum.
- Co-operation with other organisations.
- An opportunity to showcase the industry and demonstrate best practice.
- Information dissemination via congresses, reports, regional meetings and workshops.
- Initiatives for educating young people on energy matters.
- Awareness of environmental issues, conservation of energy and sustainable solutions.

Membership categories and fees
Membership is open to National Committees representing a range of petroleum interests operating within a country and sponsored by an appropriate organisation. Once established, the NC should seek recognition from WPC’s Executive Committee. Once the application is approved by the Council, the NC has six months to pay annual dues, and notify the names of up to three Council representatives.

Services to members
- Opportunities to host meetings of the Executive Committee, task forces, committees and a congress.
- Discounts on Congress fees and publications.
- Regular information on WPC activities, task forces, meetings and briefings.
- Network with other National Committees, directly through the Secretariat.
- Invitations to propose programme officers and authors for congresses.
- To have an equal voice in the WPC’s deliberations, decisions and policy recommendations.

<table>
<thead>
<tr>
<th>World Petroleum Council (WPC) at a glance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website: <a href="http://www.world-petroleum.org">www.world-petroleum.org</a></td>
</tr>
<tr>
<td>Founded in: 1933</td>
</tr>
<tr>
<td>Headquartered in: London</td>
</tr>
<tr>
<td>Number of members: 70</td>
</tr>
<tr>
<td>Countries represented: not indicated</td>
</tr>
<tr>
<td>Fees: not indicated</td>
</tr>
</tbody>
</table>

-
**Awards:** The Dewhurst Award (lecture) is used to celebrate scientific and technological excellence in the petroleum industry. The recipients of the award are well known and have demonstrated unusually high achievements over many years. The WPC Excellence Awards are honored every three years for outstanding projects within the oil and gas sector. And lastly, the Award for Young Authors aims to honor the best young presenter of a paper or poster at the Congress under 35 years as a way to attract and retain more youth in the industry.

**Level of Staffing**
The governing body of the World Petroleum Council is called the Council. It convenes once a year and elects the President and the Executive Committee in order to develop and execute its strategy. The Executive Committee is composed of 12 representatives including a President and Senior Vice President. All Executive Committee members are elected for three year terms. The WPC Secretariat is composed of a Director General and a Director of Communications.
World Road Association (PIARC)

Introduction
The World Road Association (PIARC) is the world leader in the exchange of knowledge on roads and road transport policy and practices within an integrated sustainable transport context. PIARC aims to promote sustainable and sound economic solutions and to recognize road transport in an integrated transport and land use context. It is a customer driven association, respecting the differing international road transport needs.

Mission
PIARC exists to serve all its members by:
- Being a leading international forum for analysis and discussion of the full spectrum of transport issues, related to roads and road transport.
- Identifying, developing and disseminating best practice and giving better access to international information.
- Fully considering within its activities the needs of developing countries in transition.
- Developing and promoting efficient tools for decision making on matters related to roads and road transport.

Membership categories and fees
There are three categories of membership in PIARC: National and Regional Authorities and Collective or Individual.

National/Regional Authority Members:
- Fees are not indicated.

Collective Members:
- Fees are a minimum of €290 and a maximum of €470.

Individual Members:
- Fees are a minimum of €29 and a maximum of €58.

Services to members
National Governments
- Appoint two or more delegates to the Council.
- Nominate members to Technical Committees and other bodies.
- Receive as many copies of each edition of the association’s magazine as they have delegates to the Council, as well as all other documents published by the association.
- Access the member’s area of the website.
- Receive the associations electronic newsletter.
- Appoint official representatives to the World Road Congress.
- Appoint up to two official representatives to the International Winter Road Congress.
Regional Authorities
- Nominate one member to up to three Technical Committees.
- Receive five copies of each edition of the Association’s Magazine.
- Receive one copy of all other documents printed by the Association.
- Receive the Association’s electronic newsletter.
- Appoint one official representative to the World Road Congress.
- Appoint one official representative to the International Winter Road Congress.

Collective and Individual Members
- Receive printed copies of Routes/Roads magazine.
- Receive the Association’s electronic newsletter.
- Access additional Association publications and products free of charge.
- Access the members’ area of the Association’s website.
- Receive one copy of the published proceedings of each congress.

Level of Staffing
Council: Has the ultimate responsibility for the governance of PIARC. It is composed of delegations from member states and elects the officers, the Secretary General and the members of the Executive Committee.

Executive Committee: Manages the Association by delegation of the Council. It is supported by the Commissions and the General Secretariat.

Secretariat:
- Secretary General
- Deputy Secretary General
- Head Secretary
- Webmaster
- Publications Advisor and Art Direction
- Publishing Assistant and Desktop Publishing
- Translation/Interpretation
- Membership and Accounting
- Publication Orders and Subscriptions
Appendix 5: WLPGA Consolidated budget for 2017, 2018 & 2019*

<table>
<thead>
<tr>
<th>FORECAST BUDGET 2017 (Unit: ‘000 Euros)</th>
<th>World LPG Association forecast 2017 budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVENUE</td>
<td></td>
</tr>
<tr>
<td>IC Membership Fees (30 members)</td>
<td>645</td>
</tr>
<tr>
<td>MNC Membership Fees</td>
<td>86</td>
</tr>
<tr>
<td>A Category membership fees</td>
<td>125</td>
</tr>
<tr>
<td>B Category membership fees</td>
<td>285</td>
</tr>
<tr>
<td>C Category membership fees</td>
<td>394</td>
</tr>
<tr>
<td>D Category membership fees</td>
<td>0</td>
</tr>
<tr>
<td>Association category membership fees</td>
<td>96</td>
</tr>
<tr>
<td>Discounted association membership fees</td>
<td>19</td>
</tr>
<tr>
<td>Financial Revenue (interest on loan to SARL)</td>
<td>8</td>
</tr>
<tr>
<td>Fee from SARL</td>
<td>34</td>
</tr>
<tr>
<td>World Forum (net)</td>
<td>0</td>
</tr>
<tr>
<td>Regional summits (net)</td>
<td>0</td>
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<tr>
<td>Special Project AEGPL (Congress net)</td>
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<tr>
<td>Training sales (net)</td>
<td>0</td>
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<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td><strong>1693</strong></td>
</tr>
<tr>
<td>EXPENSES</td>
<td></td>
</tr>
<tr>
<td>Salaries and Costs (ex special projects)</td>
<td>883</td>
</tr>
<tr>
<td>Salaries Special Project AEGPL Technical Support</td>
<td>0</td>
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<tr>
<td>Salaries Special Project AEGPL Other Support</td>
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</tr>
<tr>
<td>External costs Special Project AEGPL</td>
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<tr>
<td>Office Rent</td>
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<tr>
<td>Services</td>
<td>32</td>
</tr>
<tr>
<td>Phone / Fax / Mailing</td>
<td>31</td>
</tr>
<tr>
<td>Printing</td>
<td>12</td>
</tr>
<tr>
<td>Travel / Hotel / Meetings</td>
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<tr>
<td>Office Supplies</td>
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<tr>
<td>Bank fees</td>
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<tr>
<td>Sundry</td>
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<tr>
<td>Depreciation</td>
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<tr>
<td>Provision for unpaid fees &gt; 2 years</td>
<td>0</td>
</tr>
<tr>
<td>Provision for fees write-off (2.5% of budget)</td>
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</tr>
<tr>
<td>Projects</td>
<td>372</td>
</tr>
<tr>
<td>Interest on loan to WLPGA</td>
<td>0</td>
</tr>
<tr>
<td>Fee to WLPGA</td>
<td>0</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>1588</strong></td>
</tr>
<tr>
<td><strong>TOTAL NET INCOME</strong></td>
<td><strong>1,8</strong></td>
</tr>
</tbody>
</table>

*These budgets are for indicative purposes only. Annual budgets will be prepared and agreed with the Board and General Assembly as necessary.
<table>
<thead>
<tr>
<th>World LPG Communications SARL forecast 2017 budget</th>
<th>Consolidated Forecast Budget 2017</th>
<th>Member Category</th>
<th>Annual fee (k€)</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>645</td>
<td>Industry Council</td>
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<td>30</td>
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<tr>
<td>0</td>
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<td>Multinational Company member</td>
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<tr>
<td>0</td>
<td>125</td>
<td>A member</td>
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<td>0</td>
<td>285</td>
<td>B member</td>
<td>4,92</td>
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<tr>
<td>0</td>
<td>394</td>
<td>C member</td>
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<td>D member</td>
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<td>Association member</td>
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</tr>
<tr>
<td>0</td>
<td>8</td>
<td>Discount association</td>
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<tr>
<td>0</td>
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<td>500</td>
<td>500</td>
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<tr>
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<td>0</td>
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</tr>
<tr>
<td>200</td>
<td>200</td>
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<td></td>
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<tr>
<td>10</td>
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<tr>
<td><strong>710</strong></td>
<td><strong>2403</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes on members:
- Increase multinational members by 0
- Increase A members by 0
- Increase B membership by 5
- Increase C membership by 5
- Increase D membership by 10
- Increase association members by 1

Notes on membership categories:
- Multinational company: Operations on more than one continent
- A category: Handling >700kT of LPG per year
- B category: Handling < 700kT of LPG per year
- C category: LPG equipment manufacturer or service company
- D category: LPG appliance manufacturer
- Discount association: an LPG association that is also a member of a regional association, ie AEGPL or AIGLP
<table>
<thead>
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</tr>
<tr>
<td>C Category membership fees</td>
<td>418</td>
</tr>
<tr>
<td>D Category membership fees</td>
<td>39</td>
</tr>
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*These budgets are for indicative purposes only. Annual budgets will be prepared and agreed with the Board and General Assembly as necessary.*
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<th>World LPG Communication SARL forecat 2018 budget</th>
<th>Consolidated Forecast Budget 2018</th>
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**Notes on members:**
Increase multinational members by 0
Increase A members by 0
Increase B membership by 5
Increase C membership by 5
Increase D membership by 10
Increase association members by 1

**Notes on membership categories:**
Multinational company: Operations on more than one continent
A category: Handling >700kT of LPG per year
B category: Handling < 700kT of LPG per year
C category: LPG equipment manufacturer or service company
D category: LPG appliance manufacturer
Discount association: an LPG association that is also a member of a regional association, ie AEGPL or AIGLP
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<th>World LPG Association forecast 2019 budget</th>
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<th>World LPG Communication SARL forecast 2019 budget</th>
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<th>Member Category</th>
<th>Annual fee (k€)</th>
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- Increase C membership by 5
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