



SOLUTIONS FOR A RESPONSIBLE ENERGY FUTURE

Strategic Review of WLPGA Activities
2020-2022



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Foreword by WLPGA CEO & Managing Director

LPG is the world's favourite form of gas energy. More people use it directly than any other gaseous fuel. LPG is a clean-burning, low-carbon fuel which naturally occurs during conventional natural gas extraction and oil refining processes. If it were not purified, contained and transported, it would often simply be flared and its huge potential wasted.

The professional global LPG industry exists to see that this does not happen.

This diverse, independent and innovative group of organisations are united by their passion for excellent customer service and their obsession for safety, to deliver many societal benefits. For example:

- In the developing world, clean-burning LPG stoves are improving health and literally saving lives by replacing highly polluting wood, coal and kerosene appliances
- In OECD countries, millions of homes and businesses beyond the natural gas grid get access to the latest gas technology via self-contained LPG storage vessels
- When society started to become concerned about the carbon emissions and air quality impact of road transport, LPG became the alternative vehicle fuel of choice in many countries around the world – it still is today

Today, these applications and thousands more are part of everyday life for millions of consumers all over the world. Tomorrow all of these benefits and more will be secured through the development of renewable sources of LPG. The first large scale bioLPG production plant came on line in 2018 and supplies tens of thousands of customers in Europe. The industry is actively pursuing many other renewable LPG sources in numerous countries, securing the role for this clean and popular fuel into the energy future.

This strategic review shows a clear shift from internal concerns (industry infrastructure, informal players, filling infrastructure etc.) to more existential concerns about the very future of the industry itself (electrification, decarbonisation etc.). The three-pillar structural response, which is defined within this strategic review, reflects the WLPGA member concerns and enables a more externally-focused leadership role for the global LPG industry during the current energy transition. To enable this long-term vision, the LPG industry needs to focus on three principal goals:

- The understanding, support and encouragement of Governments and key stakeholders of the position that LPG can occupy within the energy sector in the short, medium and longer terms. This is reflected in our **ADVOCACY** goal.
- A culture that pursues continuous business improvement through establishing and sharing good practices. This will be reinforced by a constant attention to safety issues and a comprehensive people development programme. This is reflected in our **BUSINESS IMPROVEMENT** goal.
- The identification and development of safe, efficient and environmentally sustainable technologies that maximise the energy delivery potential of LPG. The active promotion of these new-generation energy solutions will support the industry's growth and development ambitions. This is reflected in our **INNOVATION & GROWTH** goal.

The WLPGA exists to pursue and deliver these goals.

Executive Summary

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 and looks at 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 high and growing satisfaction with the performance of the WLPGA and a strong support to maintaining the current vision:

“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, there was a clear shift in focus, from internal concerns (such as informal/illegal filling, distribution optimisation etc.) to the appreciation of the potential impact of new external changes in the environment within which the LPG industry operates. Specifically, the drive towards deep decarbonisation of future energy threatens to challenge the realisation of future opportunities for the sector unless the industry is able to position itself effectively. WLPGA accepts the link between human activity and climate change and it is the lower-carbon nature of LPG (compared to other fossil fuels) as well as the potential for renewable LPG that differentiates LPG and provides opportunity for growth.

The most important opportunities for the industry were identified as coming from key application areas including Autogas, power generation, fuel switching and marine. Realising these opportunities and mitigating the threats requires the WLPGA to have a greater focus on advocacy but also to actively improve the cooperation between and with other regional and national LPG associations. There was also a recognition that in order to be more effective the WLPGA should have a sharper focus on the identified key issues.

To respond effectively and efficiently to these threats and opportunities, the WLPGA will focus its objectives in the coming three-year period under three goals which together form our new mission:

- A) Advocate LPG as part of the solution to future energy challenges**
- B) Support efficient and responsible business**
- C) Encourage innovation and support business growth**

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. This will be achieved through the completion of nine objectives, compared to 19 objectives which were set in the 2017 – 2019 period. Secondly, leveraging the member resource needs to be improved through improving the functioning of the matrix meetings. This will be achieved through better communication of the matrix concept as well as employing the latest communications technology to allow virtual participation in matrix meetings.

With regard to resource requirements, to respond to the need for greater investment to meet the identified challenges, this strategic plan assumes a 5% p.a. increase in membership fees during the period as well as a 3% p.a. increase in overall membership with a target of 330 members by the end of 2022.

Introduction to the WLPGA strategic review

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 the WLPGA Goal Chairs during the period 2017-2019. The objective of the review is to set the direction of the WLPGA for the period 2020 – 2022 through updating, as appropriate, the association's missions/goals and objectives while ensuring continuing clarity, relevance and feasibility.

In order to optimise the activities of the WLPGA and ensure maximum value for its membership, the WLPGA holds regular three-year Strategic Planning reviews. The purpose of these reviews is to analyse, on an incremental basis compared to previous reviews, any significant changes in the environment within which the WLPGA operates and the effect they may have on the strategic direction of the WLPGA as well as the resources required, both human and financial, to fulfil the agreed mission. In addition, the review aims to assess to what extent the WLPGA has been successful in fulfilling its current mission, to identify the association's strengths and weaknesses and make recommendations on organisational structures to optimise performance of the association and its member network.

Strategic review process

The secretariat, with the support of the Goal Chairs conducted the review. Central to the process was the "Focus Questionnaire and Interview" which engaged with 25 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 2016.
- An assessment of the ongoing relevance of the WLPGA Vision and Mission statements.
- Suggestions on 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 February/March 2019. In addition to the focus interviews, WLPGA circulated a simplified on-line questionnaire to all members on February 18th which received 76 replies (compared to 62 replies that were received during the last strategic review). The feedback was subject to an in-depth analysis by the WLPGA secretariat in Paris on May 13th. Views and comments received were tested, discussed and prioritised

Outcomes

In response to the question "How satisfied are you with the value that WLPGA has delivered to your organisation in the last three years" the results were very clear with **92% of respondents being either satisfied or very satisfied**. This compares with 90% in 2016, so a further improvement. This deep satisfaction of the status quo of most WLPGA activities seems very stable and the desire to "do even more" reflects an underlying confidence in the organisation.

1. WLPGA Vision and Mission

The vision of the WLPGA should not be affected by short term strategic imperatives but encapsulate the role of the organisation at the highest level. Although there were some suggestions that the vision could be shorter and should include the word “energy”, the overwhelming response from both focus questionnaires (93%) and on-line questionnaires (97%) was to **maintain the current vision as it is**:

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

There were some suggestions to change the vision subtly but these were generally isolated comments with no consensus around a specific change.

With regard to the mission, this is something that reflects the shorter-term operational activities of the WLPGA and should be subject to revision in response to significant changes in the environment in which the business operates.

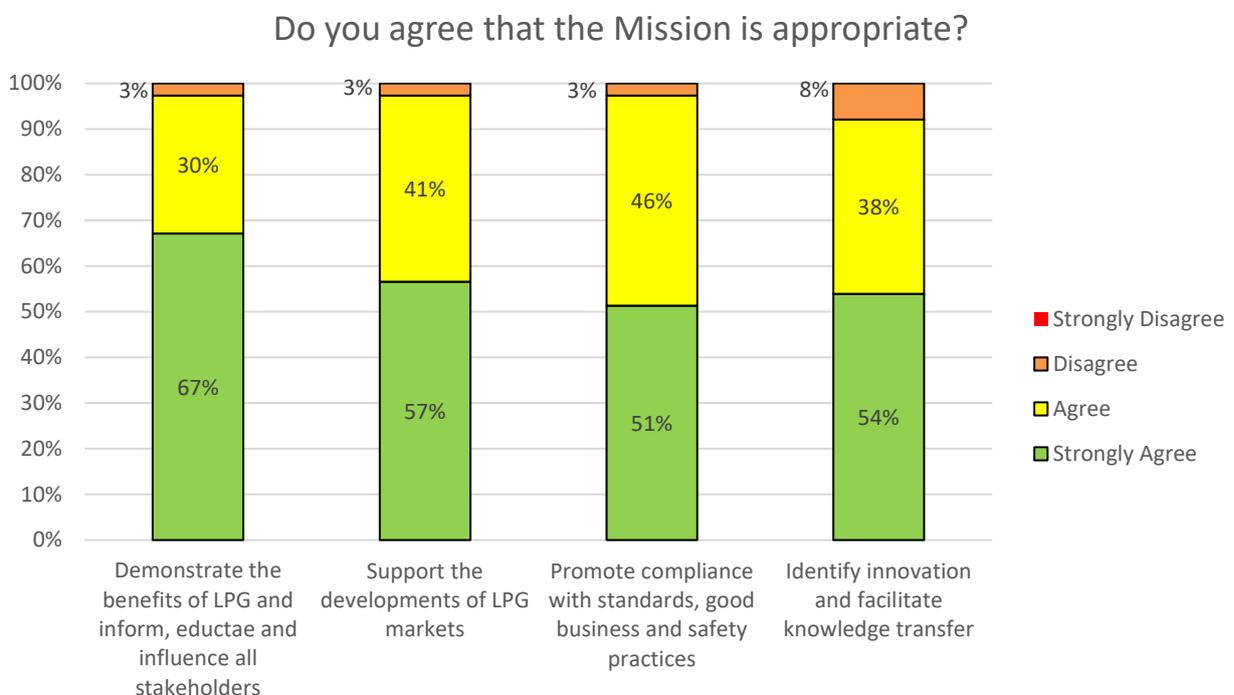


Fig 1.1 Appropriateness of the WLPGA mission (on-line questionnaire)

Fig 1 .1 above shows that the current mission statements – as reflected by our four principal goals, are seen as highly appropriate. The focus interviews were also 95% supportive of the current mission however there were some important observations: It was seen as inappropriate to target “all” stakeholders and it is suggested to change this to “key” stakeholders. Regarding who key stakeholders are, many responders felt WLPGA needs to target more stakeholders outside the industry and the International Energy Agency was cited several times. Some interviewees also urged a stronger focus on innovation and sustainability while some questioned what WLPGA is trying to achieve with market development.

Although the existing mission has high degree of support, the final selection of WLPGA goals for the coming three years needs to also reflect the objectives that are set and the reflection on WLPGA’s strengths and weaknesses. Following the in-depth review of the responses and categorisation of the WLPGA objectives, it is proposed to simplify and focus the mission around three principal pillars:

- A. Advocacy (ADV)
- B. Business Improvement (BIM)
- C. Innovation and Growth (IGO)

Each of these pillars, while distinct, also are strongly interconnected. Also, running through each of the pillars is communications which, while not a goal in itself, is fundamental to the success of each goal.

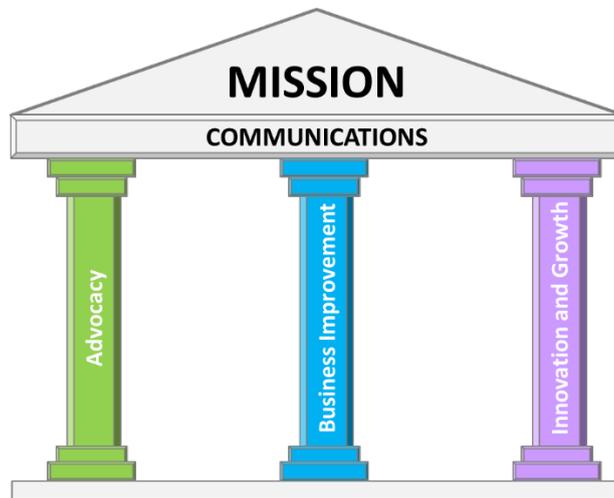


Fig 1.2 – The three pillars of the WLPGA mission

2. Changes in the operating context

Many of the trends noted from the focus interviews were unchanged from the previous strategic review. However, the most important existential threat to the industry is now seen to be decarbonisation/electrification while the most relevant activities for the WLPGA are now seen as advocacy (government lobbying and external communications) – clearly linked to the perceived threat. Interesting to note is that the prevalence of bad practices is not highlighted at the same level of threat compared to earlier reviews. Applications are highlighted as the key future opportunities which contrasts with earlier reviews that considered, amongst others, climate change, air quality, supply as principal opportunities

2.1. 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 that this remains the primary objective of the association with a new emphasis emerged regarding providing intelligence and information to the membership.

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

- The focus of civil society and governments on energy decarbonisation and the impact of this to the LPG industry.
- The growth of LPG used as a petrochemical feedstock and the role that WLPGA should have in this.
- WLPGA's role as a supplier of credible intelligence and information to its members.

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.

2.2 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.

Firstly, looking at opportunities, fig 2.1 below highlights end use applications as providing the major opportunities for LPG. Autogas again is seen by many as the most obvious opportunity but, in a change to earlier reviews, power generation and marine use are in the top five opportunities. The role for LPG in any of these applications will depend on demonstrating clear and credible environmental benefits of LPG relative to other fuels, either through original data-gathering and analysis or through collecting and disseminating existing, credible data. Once demonstrated, it is vital that the case for LPG is communicated effectively using modern communication channels. These are activities on which WLPGA can deliver.

Fuel switching 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 possibly a reflection of government policies targeting fossil fuels where LPG (and renewable LPG) can provide a pragmatic transition alternative. Fuel switching in some cases includes biomass to LPG for cooking and the awareness around this is a reflection of the successful work WLPGA has done with its Cooking For Life campaign and, together with the high ranking of the importance of developing markets, domestic and fuel switching would indicate that Cooking For Life remains an important project for WLPGA. Likewise, the opportunity from new applications would suggest that WLPGA needs to continue its activity in promoting the LPG Applications database and website.

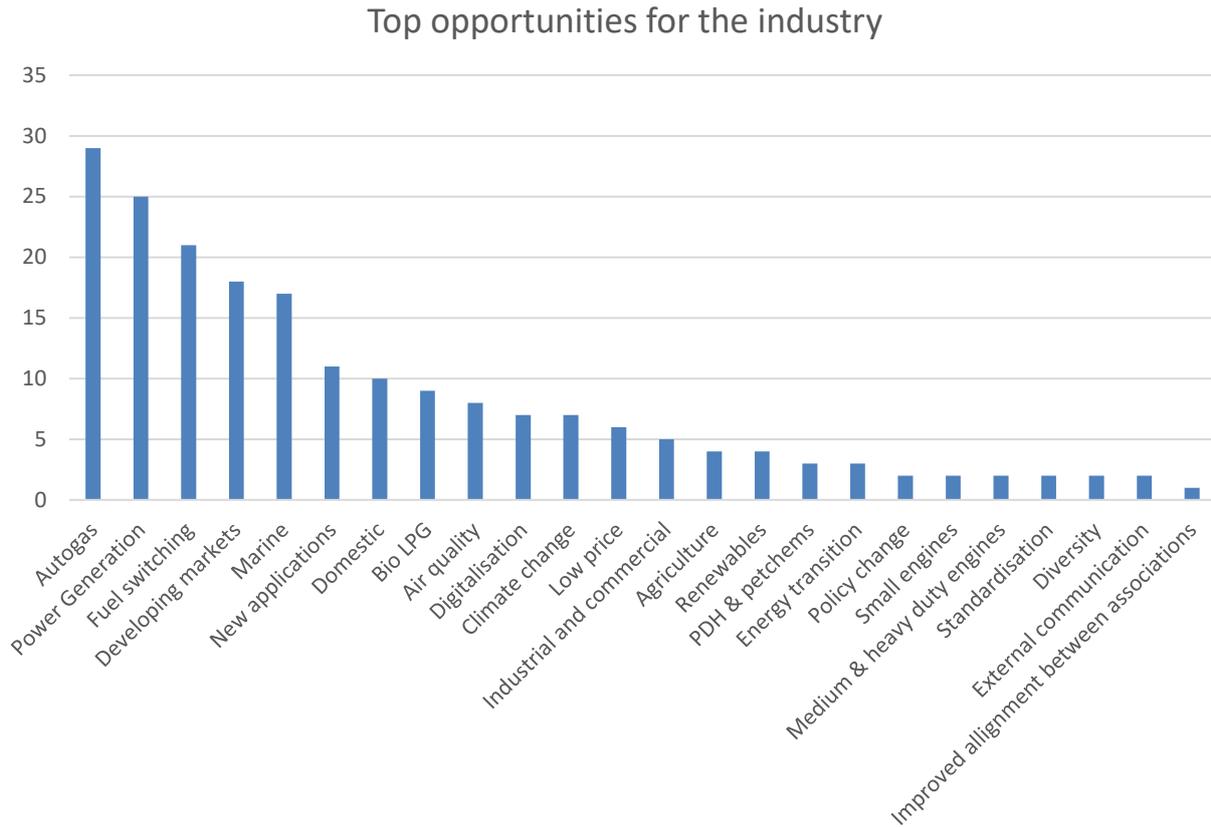


Fig 2.1 – What are the major opportunities for the LPG industry in the coming 3 years?

Turning to threats, we see a significant change in the last three years. Where poor perception of LPG was the leading concern amongst interviewees this has dropped to sixth in relative importance (see Fig 2.2). Instead, the greatest perceived threat, by a long way, is now seen to be coming from competing energy sources and in particular electricity and the trend toward “electrification of everything”. When considering that decarbonisation comes third, government policy fourth and renewables fifth, the case for WLPGA to advocate for the positioning of the industry in the future energy transition is very strong. The perception of natural gas being a threat is not unexpected since the two industries often compete for the same customers. However, it should be noted that natural gas is also identified as an ally in the campaign for gas as a transition fuel and therefore the WLPGA relationship with the natural gas industry needs to be finely tuned.

There are many other important considerations such as poor perception and awareness, an industry that is weak at innovation and an aging workforce that seems unattractive to youth. WLPGA needs to ensure that these issues do not go unaddressed in the coming plan.

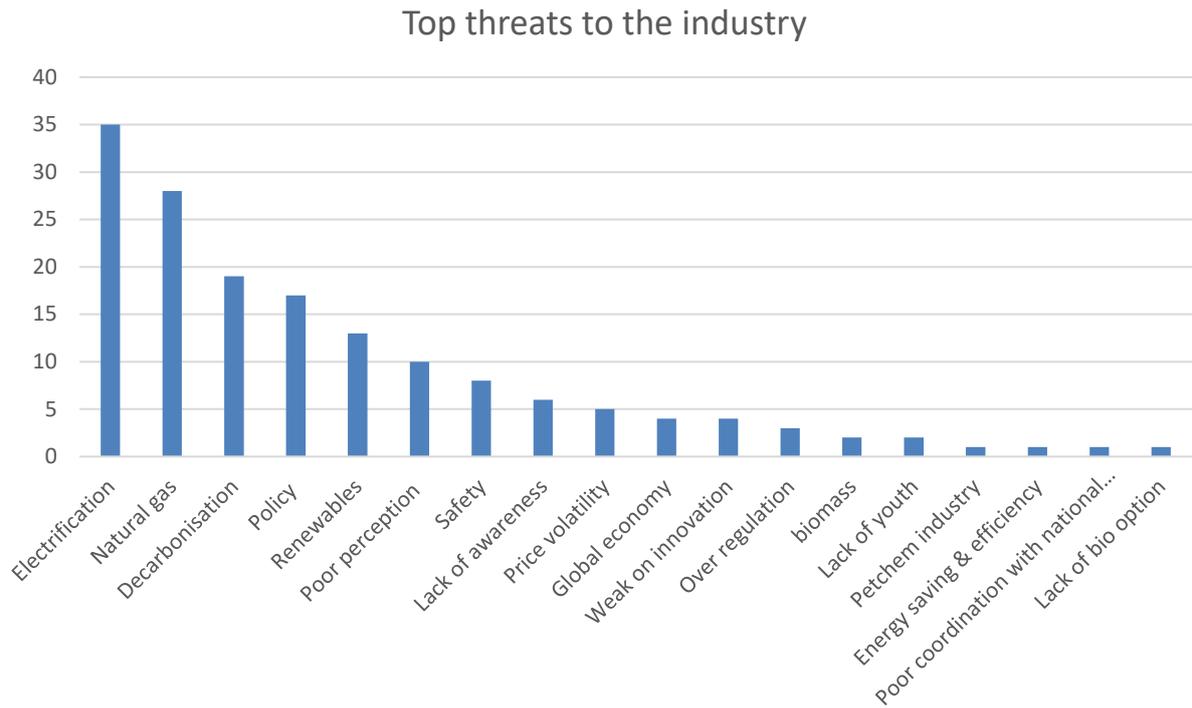


Fig 2.2 – What are the major threats for the LPG industry in the coming 3 years?

When asked for specific suggestion on how WLPGA could take advantage of these opportunities or mitigate the threats the responses were remarkably similar to the last review (see fig 2.3). The need to improve advocacy (communication and government lobbying) were again seen as the top two priorities and further strengthening these activities would appear to be crucial for improving the position of LPG in the energy sector. In addition, WLPGA is seen as having an important role at improving inter-association cooperation with many respondents identifying inconsistent messaging and failure to realise inherent synergies in the industry as areas where WLPGA can make a difference. Improving focus/prioritisation was seen by many as an opportunity (not only in this response but in others as well) while promotion of diversity in the business had a greater focus on youth rather than, as seen in the 2016 review, gender equality. The promotion of technology and innovation in the business remains a key role for WLPGA.

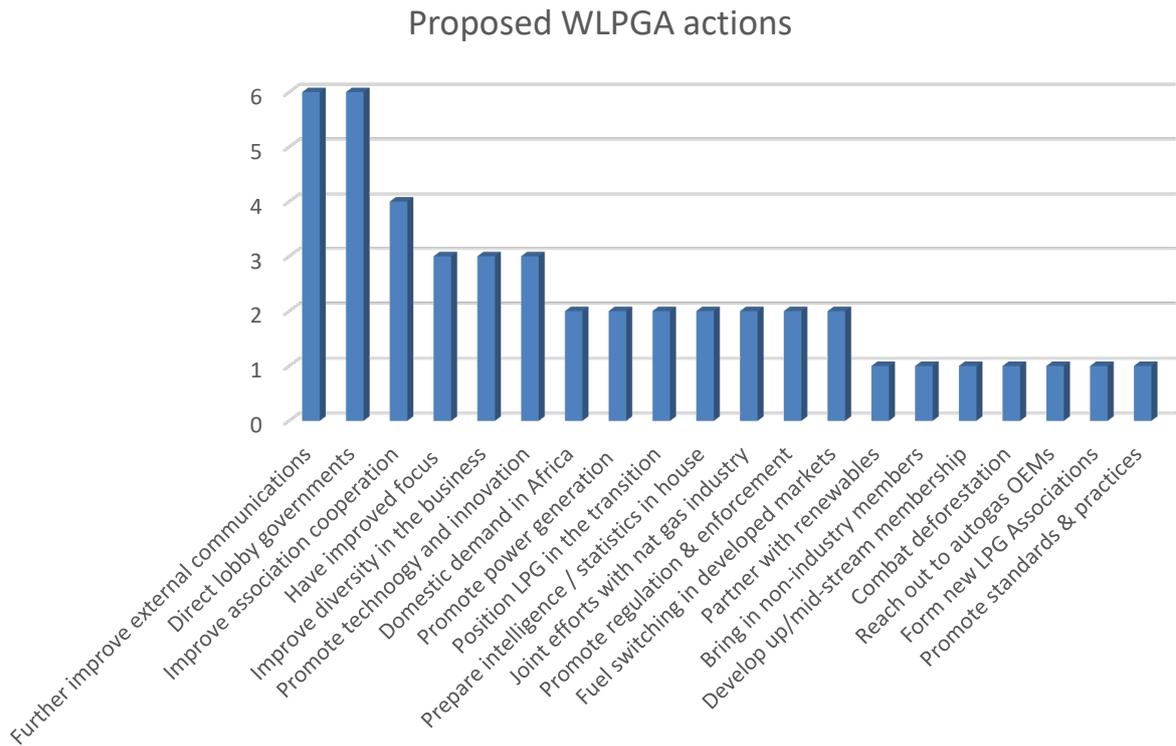


Fig 2.3 How can WLPGA take advantage of these opportunities and mitigate any threats?

2.3 Internal factors: WLPGA strengths and weaknesses

There is a broad acknowledgement from interviewees that the WLPGA is performing very well. The strengths of the WLPGA need to be recognised and leveraged in order to further improve performance. Fig 2.4 below shows some interesting changes since the last review. Our greatest strength is seen to be our membership and this is perhaps a reflection of the drive in the last three years to both increase the number of members but also to engage more effectively with, and between, members to realise the value of our member resource. The quality of the team, as well as the leadership group vested in our Industry Council, clearly adds to the credibility of the association which is seen as the third greatest strength. 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 important to recognise that the current team has been stable for several years. This should be seen as significant investment by the members and something that should be maintained. However, succession planning within the team was highlighted as an area for action.

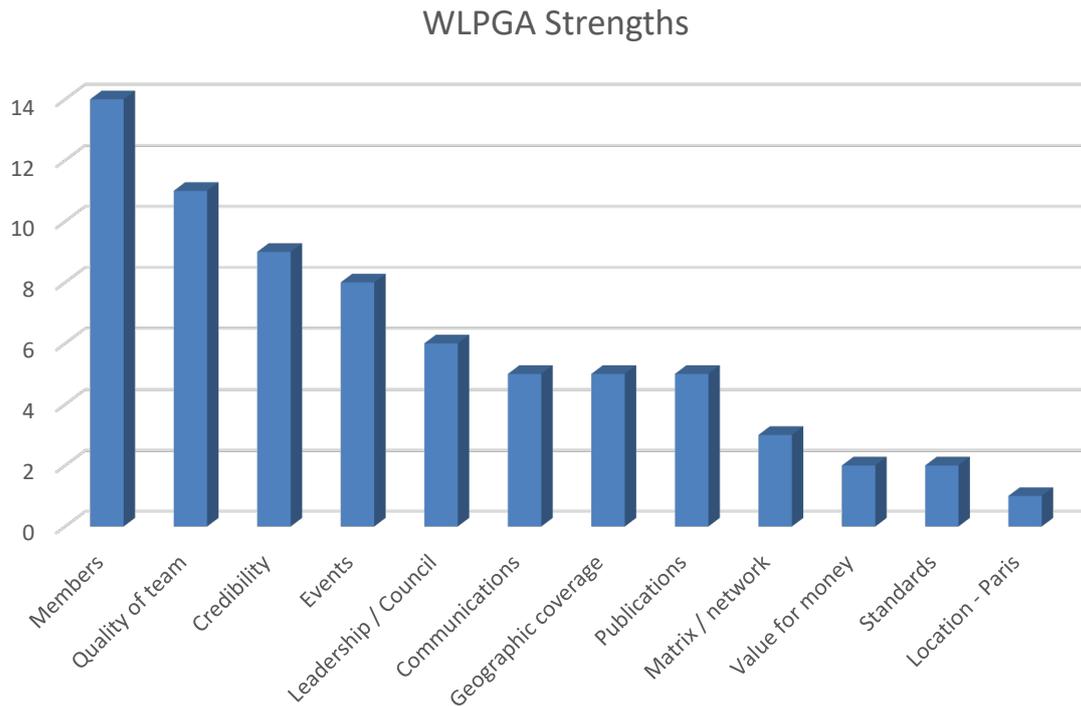


Fig 2.4 What do you see as the major strengths of the WLPGA?

The weaknesses of the WLPGA are less specific without a clear leading issue. Compared to the last review, WLPGA being distant from the realities in country has emerged as the leading issue. Part of this could be attributed to the growing number of members spread across the world with an expectation of specific local support. Lack of resources again is highlighted as a barrier to increasing influence and this goes hand in hand with a concern expressed by many that WLPGA tries to cover too many issues and needs to better prioritise its activities, albeit in contradiction to the desire of many for WLPGA to be more regionally/nationally active. Improved coordination with national association will be a partial solution to this apparent dilemma. Communication - internal and, more particularly, external - is also seen as a weakness however this has dropped from the being our number one issue three years ago and reflects the greater focus of WLPGA on this area. Responders did remark, however, that WLPGA needs to modernise its communications to stay abreast of the latest developments in technology.

Lastly there were some suggestions that the demographics and location of both the WLPGA team and leadership groups is not representative of where the market is growing fastest. Some suggestions to open regional WLPGA representative offices to counteract this, and to improve regional engagement, were suggested. This need careful consideration.

Recommendations on how WLPGA should overcome the weaknesses were similar to previous reviews and included improving/sharpening focus on priority activities; increasing available resources (though increasing membership revenue but also through other sources); improving communications, particularly external and leveraging the power of the member networks. The need to be closer to national realities could be managed by having more nationally or regionally-focused meetings and engaging more closely with national associations.

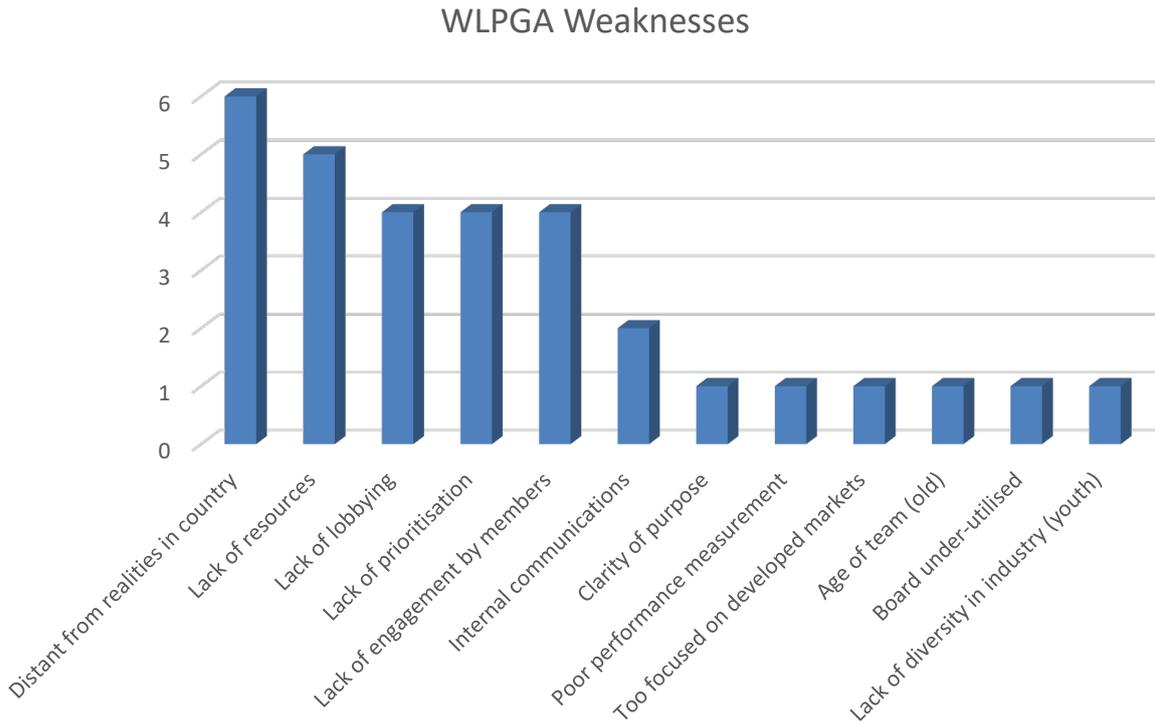


Fig 2.5 What do you see as the major weaknesses of the WLPGA?

2.4 External perception of the LPG industry

Previous reviews have shown that the perception of LPG among external stakeholders is often far removed from how the industry sees itself or wishes to be seen. This question sought to understand how the LPG business is seen, how this perception has changed in the last three years and what are the gaps with how we would like to be perceived. The LPG industry needs to be seen as part of the solution to the future energy challenges. This desired perception is essentially the same as the second highest ranked response which is that LPG should be seen as clean, safe and reliable. The actual perception is rather poor - not well understood and specifically that LPG is old-fashioned, dangerous and not innovative. In this review we also note that the actual perception is not always negative with some responders highlighting that the industry is seen as well-organised and linked with natural gas. It was also noted that perceptions are highly heterogenous across the world. In developed economies LPG is seen as a more old-fashioned fuel and part of the problem. In emerging economies, it is seen as costly and dangerous. Lack of innovation and being a niche fuel are perceptions that perhaps reflect reality even if the industry would prefer itself to be seen differently. Part of the solution to this is improved advocacy and communication but improving innovation in the sector is a major task that WLPGA can only help stimulate.

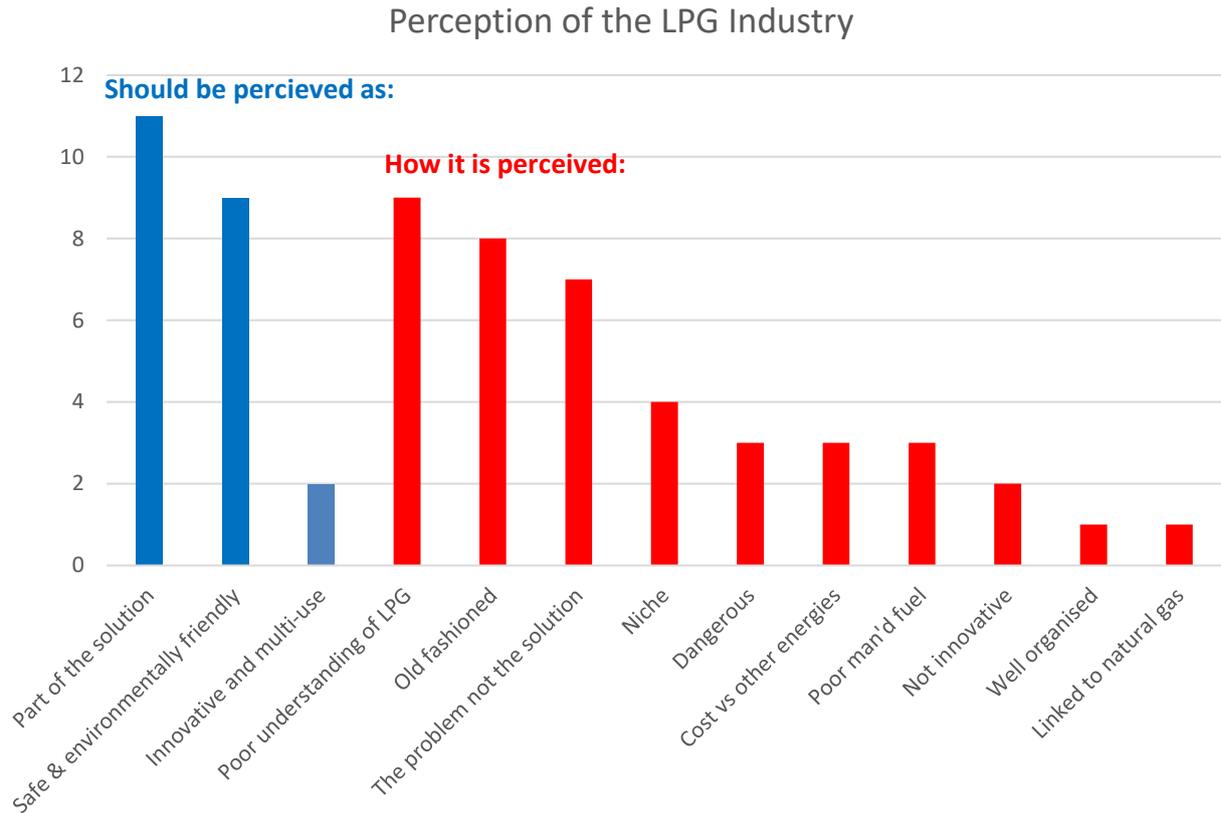


Fig 2.6 How should the LPG industry be perceived?

2.5 WLPGA events

Feedback on WLPGA events was generally 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. Networking and learning were highlighted as the key strengths however, while positive, these are predominantly internally-focused outcomes and do not reflect the external objectives of the event. This can be seen as an area of future improvement. There was strong encouragement to continue with regional events however though there is a growing feeling of event saturation with many now being supported by WLPGA. This is something that needs to be carefully considered in the coming period.

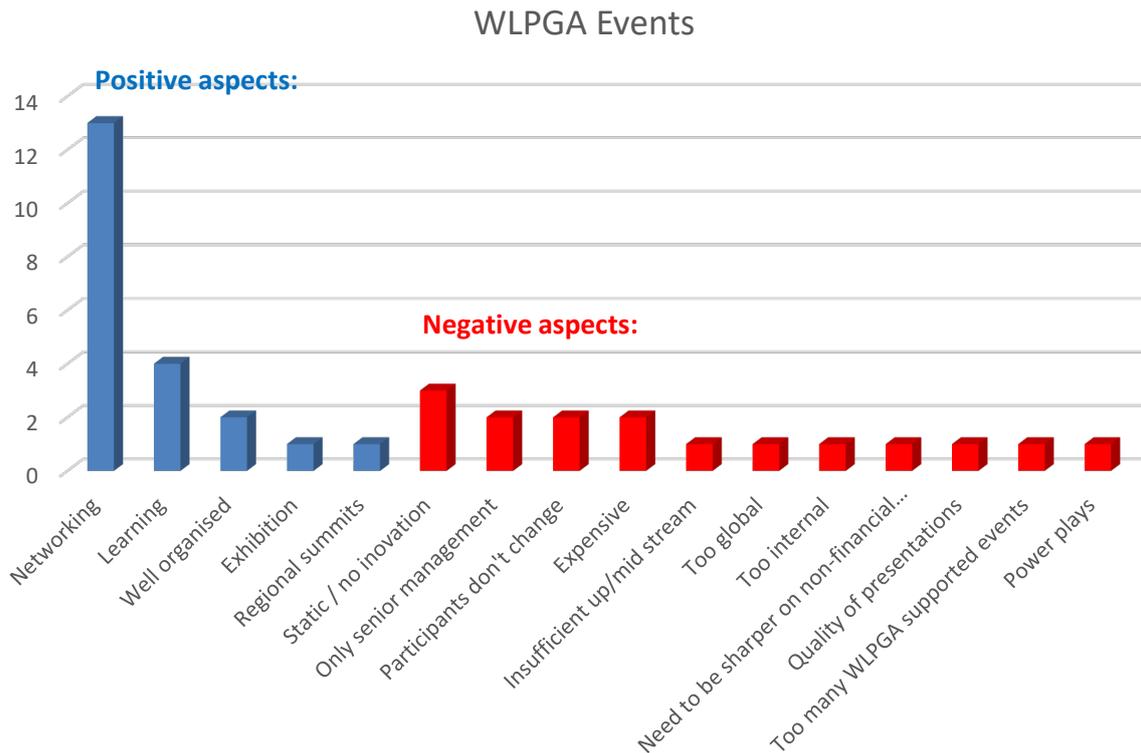


Fig 2.7 What are the strengths and weaknesses of WLPGA events?

There were no commonly agreed areas of weakness related to events but the top three considered together can be seen as related: Static, limited to senior management, participants do not change. The lack of new faces perhaps reflects the reality of industry which is small, however we should take note of the lack of middle and junior staff. These are the future of our industry and their involvement and visibility may help to counteract some of the other issues that our industry faces related to external perceptions, lack of innovation and poor diversity. There is a perception that the focus of the events is too internal and this reinforces the more general feedback concerning lack of external communication.

2.6 The Matrix

In response to some of the shortcomings identified in the last strategic review, the WLPGA created the Matrix as a way to improve the effectiveness and efficiency of member engagement across all WLPGA activities. Previously the major weakness of our member engagement structures was the limited active engagement of members (and lack of diversity of members). It can be seen that despite the move to the Matrix this is still seen as an issue. Previously, our networks were seen to lack focus or be “all talk and no action”. These weaknesses have no longer been identified as major issues in the matrix structure.

The majority of responders were very positive about the matrix concept – trying to ensure that meetings map against all areas of activity and focus on issues affecting participants in the country/region where the meeting is held. Important concerns however are that the concept is only well understood by a small group of “insiders” who regularly attend all meetings. There are too few participants and far too little change in those who do attend (i.e. often the same people participate). Some responders also called in to question the effectiveness of the format.

Given the general support for the concept, the matrix is something that WLPGA should pursue but greater effort needs to be focussed on internal communication around the matrix concept to ensure better understanding. In addition, the effective use of modern communications systems to allow remote connections to meetings need to be explored which would allow greater and more diverse participation.

Beyond this, feedback also indicates that WLPGA internal communication often does not extend beyond the member representative. Many staff of member companies are totally unaware of the activities and benefits of membership and this may be a contributor to the problem regarding diversity and level of participation. Given the lack of resources and the need to improve effectiveness, WLPGA needs to better leverage its member resource and improving the effectiveness and understanding of the matrix is a clear priority.

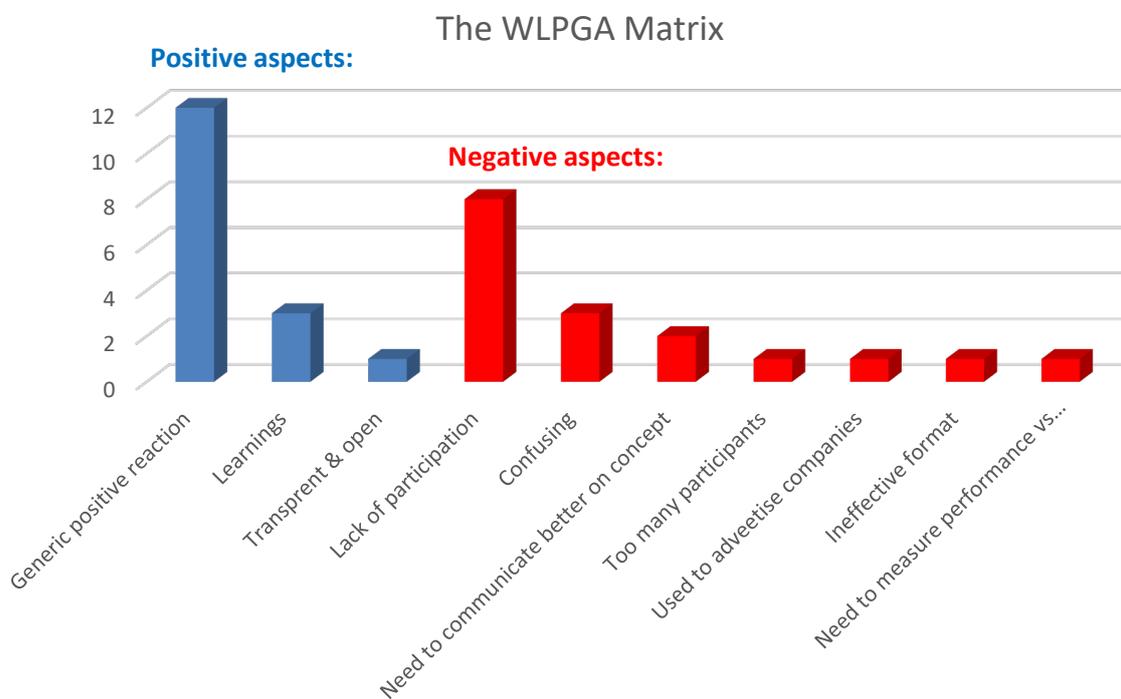


Fig 2.8 What are the strengths and weaknesses of WLPGA networks?

2.7 Imperatives for change – what WLPGA should address

The value of WLPGA’s current mission and other key activities was assessed through the on-line questionnaire – see fig 2.9 below

With regard to importance, all key activities that WLPGA undertakes are considered by more than 70% of respondents to be either very important or important. 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” and “important” has grown significantly while the number of replies indicating “unimportant” or “very unimportant” has declined considerably. The activities that scored lowest were regional summits and matrix days which were each considered as “unimportant” or “very unimportant” to 25% of responders. Both of these activities require participants to travel which makes them necessarily restrictive and perhaps less attractive.

Importance of WLPGA activities

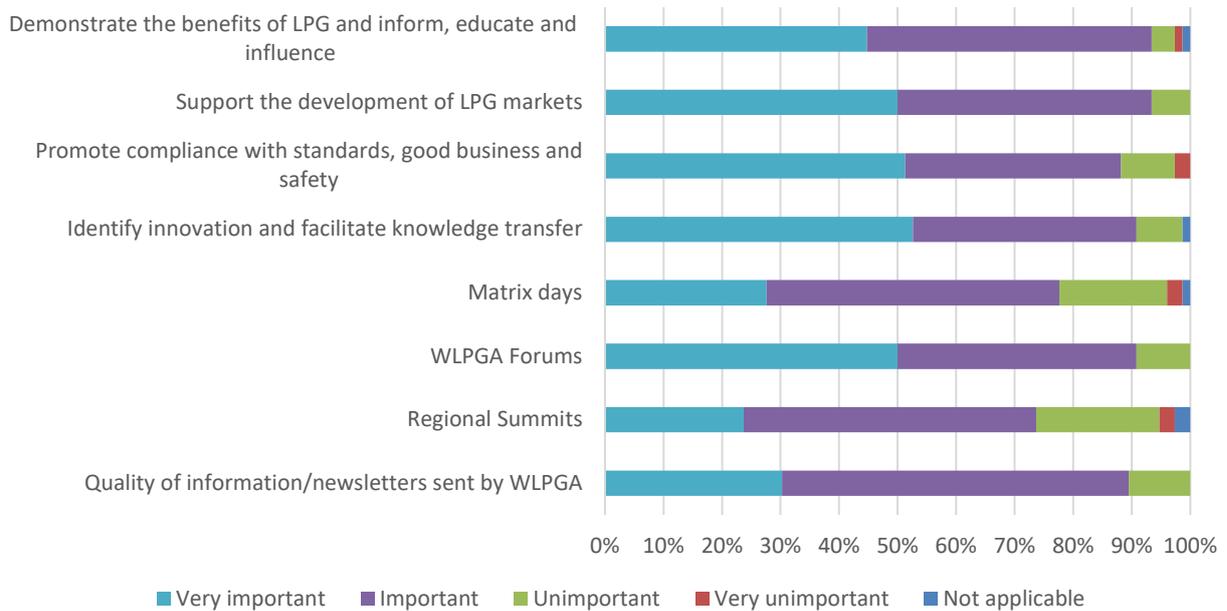


Fig 2.9 How important are the following activities to your organisation?

2.8 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. The feedback is shown in fig 2.10. In the last review, the natural gas industry was highlighted as the key area of new partnerships. What we now see is that while the gas industry remains important, responders feel that internal partnerships with regional and national association are equally important. This change reinforces the trends that are seen in other questions in this analysis which is the need for WLPGA to further coordinate with and between national and regional associations

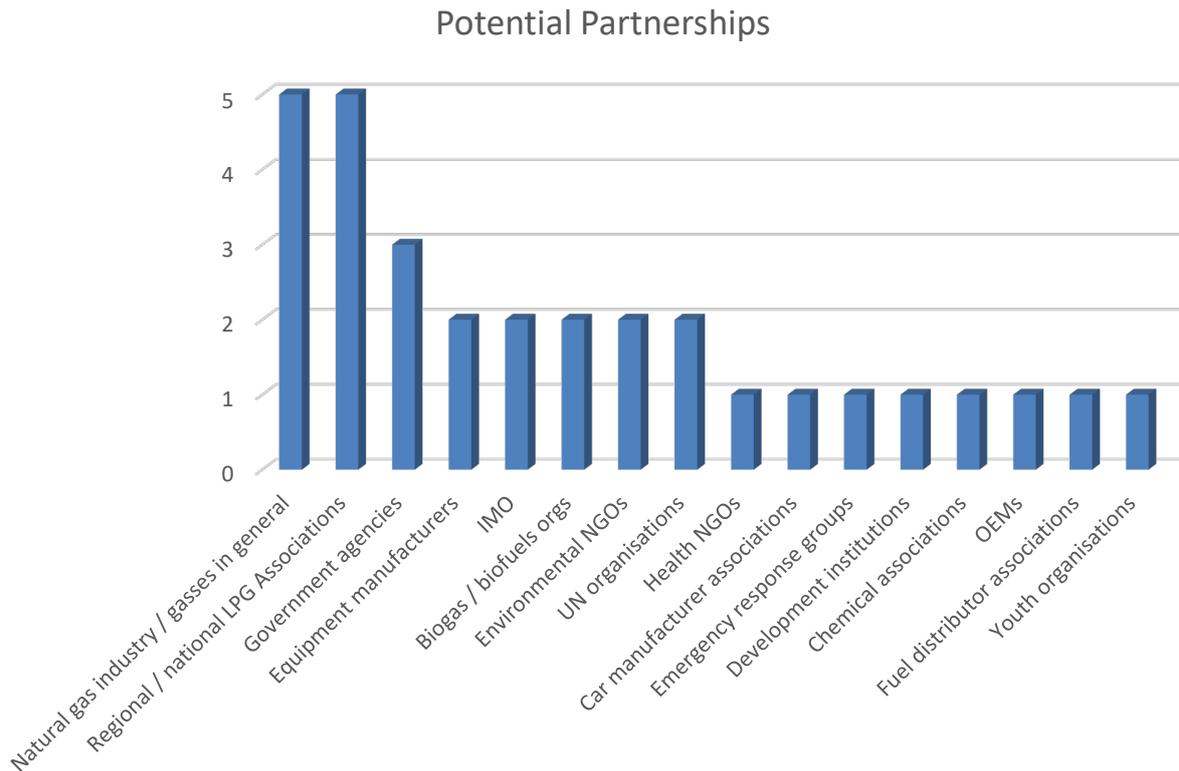


Fig 2.10 What new partnerships should WLPGA develop?

Put together, government agencies, UN organisations and the IMO would account for the largest target group and these external stakeholders have to be taken into account in the future period.

2.9 Membership vs fee increase

In the last four years the WLPGA has kept its annual free fixed. This is despite increases in general operating expenses in France. To ensure sufficient financial resources to maintain planned operations, the WLPGA focused on increasing the number of members. This was a clear strategic decision and the targets were successfully met. As we look forward to the next three-year period the question was raised as to whether fee increases would now be appropriate to cover inflationary cost increases or whether further increase in the number of members is more appropriate.

The feedback is not clear cut. While the majority of responders preferred an increase in number of members, many recognised that member development and maintenance becomes a significant burden on a small team. As the absolute number of members increases, incremental new members tend to be those that require greater level of individual service and are more focused on tangible return on investment. This increases the member turn-over and the consequent bureaucratic burden on the team. When considering those respondents who agreed that an increase in fees was appropriate only if justified, the option to increase fees became the preferred option. Many respondents did not see the increase in resources as coming from membership revenue, but rather from other revenue sources such as training, events or direct sponsorship/special projects. As with increased membership, these other sources would require a diversion of staff time which is already limited. Another interesting concept that emerged from this question was the possibility to change the structure of membership – introducing tiers, with different levels of service, that are optional rather than proscriptive. This would give the possibility to increase the overall membership revenue while attracting more members at a

low-service level. However, such a change would also risk revenue should members decide to downgrade.

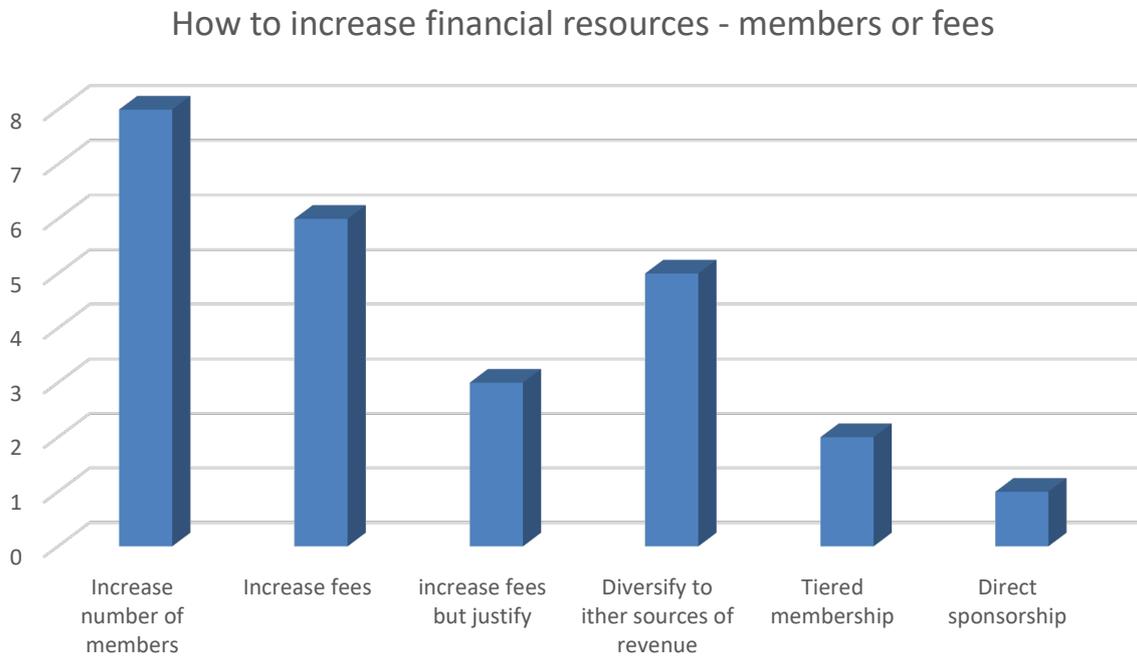


Fig 2.11 How to increase financial resources?

3. WLPGA Goals and Objectives for 2020 - 2022

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 for the sake of avoiding misunderstanding:

- Vision:** A statement that provides long strategic direction for the organisation.
- Mission:** A statement or series of statements that describe the organisation's purpose in general terms.
- Goals:** Generalised statements of what the organisation wants to focus on during a defined period.
- Objectives:** 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.
- Actions:** 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.

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

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

Despite there being broad support for the current mission, based on the full feedback to the questionnaires and focus interviews, it is recommended to adjust the Mission of the WLPGA for the forthcoming period as follows:

- To advocate LPG as part of the solution to future energy challenges
- To support efficient and responsible business
- To encourage innovation and support business growth

The mission statements above will form the three principal goals of the WLPGA in the coming period, namely: Advocacy (ADV); Business Improvement (BIM); Innovation & Growth (IGO).

3.1 Advocate LPG as part of the solution to future energy challenges

It is clear from the findings of the strategic review that the industry faces significant future challenges due to regulatory pressure from governments enacting ambitious legislation to accelerate the move to decarbonised economies. In this context the role of WLPGA as a strong voice of advocacy and clear communications for the industry is crucial.

Aggressive measures to decarbonise often through the promotion of increased access to electricity as well as expansion of renewable energy sources, creates a need for the LPG industry to articulate clear messages on the role the industry should play in the coming energy transition. By focusing on the integral qualities of the product there is a strong case to be made that LPG as a fuel should be included in the future energy mix in both developing and developed countries.

Clear, coherent and consistent messaging as well as strong advocacy positions will be crucial in addressing the poor perception of LPG with key stakeholders and ensuring that its inherent qualities as a fuel are recognised and understood.

WLPGA must work closely with its national association members to create the necessary advocacy and communications tools to ensure that decision makers in their respective capitals are informed and knowledgeable about the benefits of LPG and its position in the energy sector. It must also strive to position the industry as modern, innovative and forward looking.

Issues such as climate change, urban air quality, clean transport, clean cooking and energy access offer the LPG industry very clear opportunities for future growth and positive messaging. Ensuring that what has traditionally been a fragmented industry speaks with one voice when addressing these issues is something that WLPGA can do through various advocacy and communications programmes and initiatives.

Objectives:

Objective A1 – Identify Key Global Stakeholders through a focussed mapping process and development of a comprehensive advocacy strategy.

In order to maximise the ability of the global industry to position itself in the energy transition and future energy mix, it is imperative that WLPGA form strategic partnerships with key global stakeholders. Objective A1 will identify which stakeholders are crucial to positioning the industry and create, or in some cases maintain, strong working relationships that work towards better positioning LPG. Organisations such as the EU, IMO, UNFCCC, IEA and others that cover a broad spectrum of interests and focus areas impacting the LPG industry will be targeted. With some organisations, e.g. the IMO, WLPGA will look for specific engagement where we will secure Observer status to ensure that the LPG industry has a voice within the 120 delegations during discussions on the Hazardous and Noxious Substances Convention. Continued WLPGA observer status is seen as vital to the interests of the LPG industry.

As a global industry association, we have to deal simultaneously with numerous issues across many countries. National and regional LPG companies and associations need powerful arguments and effective materials to educate their own stakeholders to ensure that legislation takes into account the concerns of the local LPG industry. Cross border and global stakeholders are becoming increasingly influential and the WLPGA will undertake an extensive audit of these organisations to ensure we approach all advocacy audiences in a vertically integrated and consistent way. This approach will start with a detailed stakeholder analysis and lead to a structured engagement programme. Here is a brief outline of the process:

- Map the current international energy, health and environmental stakeholder population by geography, issue and influence.
- Design the communication approach by groups of related/complimentary stakeholders.
- Identify appropriate channels etc to ensure these influencers are engaged (measure via social media).
- Create a calendar of engagement activity including events, publications and direct interventions.
- Identify the key national/regional stakeholders and support more localised engagement by national companies/associations through the common use of material and key messages.

WLPGA Events (regional summits and the annual Forum) continue to be key opportunities to advocate LPG to industry stakeholders. In the period 2020 – 2022 the World LPG Forum will be transformed into *LPG Week* - an initiative by WLPGA to regroup a number of LPG related events under the branding '*LPG Week*'. *LPG Week* will be the umbrella for a suite of events/activities/meetings taking place during the week of the World LPG Forum. The fixed features of *LPG Week* are the Association's internal meetings, the Global Technology Conference and the World LPG Forum. The location and theme of *LPG week* will be chosen to reflect the objectives of *LPG Week* and WLPGA's strategy during the period.

LPG Week has a key role to play in the outreach to external stakeholders. The external stakeholders of the World LPG Forum identified in the past are the following:

- International bodies
- Key-opinion-leaders
- Government/policy-makers
- R&D
- Legal
- Press/Media: international, national, regional, sectorial
- Students
- Trade Associations
- Other industries
- NGO's
- End-user, Consumers

The key measures of the delivery of objective A1 will include:

- The quality and timeliness of the stakeholder audit (member feedback).
- The production of four major issue-based publications aimed at stakeholder groups.
- 100 + Twitter based comments on relevant issues from direct action.
- 1,000 national social media interventions inspired by WLPGA initiatives.
- 50 LPG supportive stakeholder endorsements published during each year.
- Increase the participation of external stakeholder at WLPGA events to be 4% of the total registrations.

Objective A2 – Advocate for LPG in the decarbonisation debate through a series of initiatives including, but not limited to: media outreach; annual studies focussed on the contribution of LPG to the energy transition; direct support to lobby activities of national and regional LPG associations.

Like many segments of the energy industry the LPG industry is coming under immense regulatory pressure from governments that are setting highly ambitious decarbonisation targets. It is very clear from the findings of the strategic review that the industry wants WLPGA to have a large role in confronting this challenge. While there is a limit to what WPGA can directly undertake at a global level, it can work with its members at a national and regional level to ensure that the role LPG has to play in the energy transition is clearly understood, monetised and articulated.

The LPG Contribution to the Energy Transition: In order to support understanding of the role of LPG in the energy transition WLPGA will work with its members to create an annual report and related communications campaign that highlights the contribution of LPG in the decarbonisation debate.

The stakeholder analysis, issue identification and media relations activity will inform the establishment of a common communications platform. This piece of work will hold all of the extensive LPG industry data and content collected over the years. This will then be updated and collated for fast recovery and dissemination. This will enable us to respond to key issues featured in the media immediately and also support national associations to do the same in their local markets. The extensive content contained within this platform will also feed the creation of planned campaigns as required to support our three strategy pillars.

Improved member/association alignment was identified as one of the top opportunities for the industry. Likewise, poor alignment was also seen as a threat to the industry, especially poor coordination with national associations. It was also identified as the third most important proposed WLPGA action. During the last three years significant effort has been put into enhancing cooperation with associations and this needs to continue and be enhanced.

The priority measures for this objective are:

- All selected content held in this platform should be true, compelling and designed to educate, inform and influence key stakeholder audiences.
- This platform will include an updated Charter of Benefits together with new focused material to support coherent global campaigns.
- Social media will be a key target for an ongoing constant campaign to position LPG in the electrification/decarbonisation and clean air debate. The direct WLPGA social media intervention will aim to generate 1000 social media inputs on top of the national association target mentioned in the stakeholder section.
- Identify the key association partners (minimum 25% of our associations members) and agree a tailored MOU to align strategies.
- Support national associations directly with lobby activities.

The three strategy pillars of the WLPGA will all require communication campaigns to support their initiatives from time to time. The WLPGA communications team and infrastructure will develop and ensure delivery of these agreed campaigns. The pursuit of the core communications objectives detailed above will radically increase the capability of the WLPGA to undertake external advocacy, business improvement and innovation support campaigns. The process for agreeing, designing, delivering and measuring these campaigns will be a joint responsibility of the communications team and the coordinators for each goal. The common approach to these projects will include a defined budget, allocated resources, a beginning and end timeframe and measurable targets.

Thought Leadership Think Tank: Part of today's industry association advocacy activity always includes the endorsement of sympathetic and independent experts. These will be sought by the WLPGA in accordance with the issue management objectives. To also increase the credibility of the association itself, the WLPGA leadership will also contribute to articles dealing with our defined target areas. It is anticipated that the WLPGA will establish an ongoing relationship with two independent experts, or organisations and have quarterly articles published by WLPGA staff in targeted websites – every year. In order to increase effectiveness of industry-wide advocacy initiatives, it is important that for WLPGA to have strong working relations with national and regional LPG associations. WLPGA will work to form national associations where they do not already exist and to ensure close cooperation and coherent and consistent messaging where they do already exist. Leveraging national associations will allow WLPGA to be more effective in diffusing positions and information regarding the industry and ensuring that it is positioned accurately and fairly.

Objective A3 – Formulate and promote LPG's contribution to achieving the Sustainable Development Goals (SDGs) through a communications and advocacy campaign.

The 17 SDGs were launched by the UN in 2016 with a target date for completion of 2030. They cover social and economic development issues including poverty, hunger, health, education, climate change, gender equality, water, sanitation, energy, urbanisation, environment and social justice. The LPG Contribution to the SDGs project was launched in 2019 as a way to map the contribution that LPG makes in achieving the SDGs. The goal is to highlight how LPG can contribute to achieving all 17 of the SDGs and ensure that there are adequate communications and advocacy tools for this purpose.

Promote how LPG contributes to achieving the SDGs: To achieve widespread understanding of how LPG can contribute to achieving the SDGs, WLPGA will take the following actions:

- Build on the 2019 mapping of the seven SDGs where LPG has the most tangible impact and create a mapping for all 17 of the SDGs which will be illustrated via a range of case studies.
- Work with the WLPGA communications team to ensure that a full communications campaign around the SDGs is launched and managed. This will include a web presence and full use of relevant social media channels which leverage the already existing SDG infographics.
- Create a Charter of Benefits for LPG's contribution to the SDGs that is consistent with the existing WLPGA Charter of Benefits.
- Raise awareness with members of LPG's contribution to achieving the SDGs and get them to contribute case studies to WLPGA to illustrate the issue. It will also be crucial to get members to use WLPGA's communications collateral and messaging in their communications to amplify the story.
- Represent the industry in key global events where issues related to the SDGs are discussed.

3.2 Support efficient and responsible business

The strategic review reconfirmed that one of the primary objectives of the WLPGA is to promote LPG as a safe and efficient fuel and enhance the image of the product and the industry.

The review also highlighted a background of significant changes to the global energy industry and the LPG sector during the last three years. Amongst these changes were the emergence of new threats and opportunities for the industry that were not identified as significant three years ago. For example, the threat of electrification and decarbonisation, and the opportunities in emerging sectors such as gas to power generation and LPG as a marine bunker fuel.

WLPGA needs to continue to deliver its core support to the industry but at the same time it needs to be agile to change, and monitor threats and identify new opportunities when they emerge. A good example is the subject of digitalisation. It has emerged as a potential key tool for the industry but was not identified three years ago. Following the recent WLPGA report on the Internet of Things (IoT) - which demonstrated many opportunities for the industry to improve, be more efficient, and become smarter - the plan for the next three years is to include digitalisation as a subject to closely monitor and share the opportunities it presents with members.

The business improvement goal (BIM) will not only focus on many of the core programmes that the WLPGA has delivered in the past - to ensure a safe and sustainable industry - but also to closely monitor and report on new developments as they occur and take advantage of these. This also includes closely monitoring and reporting on the changing energy and LPG sector environment through the annual global statistical review and other more regular reports.

Objectives:

Objective B1: Improve safety in the business through developing three new WLPGA Good Industry Practice Guides for specific LPG sectors and holding six in-country workshops, focused on cylinder management, market regulations and enforcement.

Following publication of the two flagship WLPGA documents - Guidelines for Good Business Practices and Good Safety Practices, a series of Good Industry Practice Guides that focused on the more important and riskier areas of the business were developed. During the next three-year period three more Guides will be prepared with one being published each year. The first of these will be completed in 2020.

A steering group will be established to oversee production of the Guides, selecting topics to be covered, drafting a manuscript and then securing approval from the group for publishing the Guides in pdf flip-book format. In addition, it is planned during the period to update the current library of ten Guides.

The absence or lack of adherence to generally accepted good industry practices (both safety and business) undermines the sustainable development of LPG markets. Using the WLPGA Guidelines for Good Business Practices and Good Safety Practices – the Guides, as well as the WLPGA recommendations on cylinder management and requalification – the WLPGA will work with member organisations to disseminate key messages and influence operators and governments wherever possible. Requests for workshops will be assessed on their merit and conducted after Industry Council approval.

In order to directly influence practices in key markets, two countries will be identified each year by the WLPGA Industry Council to hold in-country workshops. These workshops, which will bring together

government and industry, will focus on cylinder management and enforcement, using the WLPGA Guidelines and Guides.

Objective B2: Encourage business improvement through knowledge transfer, to and within the industry, on issues such as: market intelligence; digitalisation and through standards harmonisation.

Under objective B2 we will focus on several key elements: The role of LPG Week and the annual Statistical Review of LPG in the context of knowledge transfer; the potential impact of digitalisation in the business and the harmonisation of selected LPG standards.

LPG Week is an initiative by WLPGA to regroup a number of LPG related events under the branding '*LPG Week*'. The LPG Week will be the flagship event for the WLPGA and is to be seen as the umbrella for a suite of events/activities/meetings taking place during the week of the World LPG Forum.

The objective under B2 is to further improve and develop the World LPG Forum as part of LPG Week ensuring the participation of at least 580 delegates while meeting minimum revenue targets.

The Global Statistical Review is a flagship publication for the WLPGA. Under objective B2, the WLPGA will continue to produce the report on an annual basis, ensuring that feedback from members is considered as part of a process of continuous improvement.

The impact of digitalisation on life has been one of the major changes in the last decade with a projected 50 billion devices being connected to the internet by 2020 (Cisco IBSG). It has been estimated that the LPG industry is probably ten years behind the telecommunications industry with the adoption of digitalisation. The WLPGA responded to this in 2018 with a report on the IoT which highlighted the current status and showcased some of the areas where the industry could adopt IoT to become safer and smarter. Under objective B2 WLPGA will create a programme for the next three years that allows the industry to continually monitor, share and report events in the digital space to ensure the industry is not being left behind. Specific measurable activities include:

- Hold an annual start-up competition, focusing on external players as part of LPG Week.
- Hold one educational session each year as part of the WLPGA schedule of events.
- Keep the IoT report continually updated with an annual revision including new case studies that demonstrate adoption opportunities for the LPG industry.
- Set transformation goals for the industry to monitor digital adoption.

Production of LPG-related standards and their harmonisation are important activities in the LPG industry. This involves resolving any conflicts between standards, particularly related to ISO standards (in relation with European, CEN standards), aligning the industry on a clear global LPG operational strategy, helping to drive efficient and effective practices and driving standardisation decisions according to the interests of the LPG industry. In the coming three years we aim to enlarge the scope of our involvement into other standards, outside ISO, of international interest.

WLPGA will continue working with its members and particularly Liquid Gas Europe (on CEN standardisation), to harmonise, simplify and optimise ISO standards impacting the industry. This will also involve related work in the context of the UN Sub-Committee of Experts on the Transport of Dangerous Goods - UN Model Regulations (Orange Book) and representation in the meetings in Geneva.

Objective B3: Support improved diversity in the LPG business through increasing women employed in the sector by 3% compared to 2019 and through developing a programme to attract young talent

WLPGA has recognised an opportunity for the industry to address the issue of diversity, not only with respect to gender balance, but also regarding the engagement of youth.

Women in LPG Global Network WINLPG

WINLPG was launched in 2015 and currently has almost 2,000 members, six national chapters and a full social media and communications programme. The targets for WINLPG under objective B3 are:

- Increase the percentage of women employed in the industry by 3% (on the results of an audit to be carried out Q4 2019) by 2022.
- Increase WINLPG membership by 50% from 2,000 to 3,000 by the end of the period.
- Add at least one national chapter per year to reach a target of nine chapters by the end of the period.

Youth

Lack of youth has been identified as a threat to the industry and an area that merits increased attention. This issue was also identified as an issue for the association itself. WLPGA is well placed to put in place measures to address this issue, as has been done (and continues to be done) for women in the industry.

The targets for youth engagement under objective B3 are:

- Create a dedicated working group to propose solutions to attracting youth.
- Carry out an audit of current activity within key WLPGA members companies.
- Audit the number of 'young' talent in key companies (e.g. what percentage of people under 35 in ten major member companies) and propose target for the sector.

3.3 Encourage Innovation and Support Business Growth

Business growth needs innovation, new technology, applications, studies, reports and good awareness of all of the above.

In addition, for the LPG industry to grow in the current environment characterised by aggressive decarbonisation targets as well as aspirations to for the rapid electrification of everything, requires strong and coherent industry responses. The industry must also be able to demonstrate the viability of renewable LPG as a long-term energy alternative.

The conversion of an additional 150 million people to cooking on LPG from biomass and other dirty and dangerous traditional fuels must be pursued with determination. The Cooking For Life programme has been very successful in getting LPG recognised globally as one of the best solutions for addressing the environmental and health challenges associated with indoor air pollution related to the use of traditional fuels for cooking and this will continue.

Flagship and highly promising LPG applications like Autogas must continue to be promoted through direct policymaker, media and social-media engagement. The WLPGA global Autogas roadmap will include implementation scenarios and programmes in three countries as part of this strategic plan.

Specific awareness campaigns will be developed and sustained around key areas of future LPG consumption including: Identifying key influencers; communications campaigns; outreach to OEMs/appliance manufacturers and more.

Activities on identifying innovation and new technology, particularly related to applications; as well as ensuring that these are well known to the industry and outside must be pursued through studies and reports, promotional materials and events the Exceptional Energy in Action website.

Objectives:

Objective C1: Promote new technology, innovation and applications for LPG through, amongst other activities: the preparation of three studies on new application opportunities; development of the Exceptional Energy in Action website and participation in selected exhibitions/conferences in key sectoral areas

The identification of new technology, innovation, new applications, appliances and dissemination of related information throughout the membership and wider is key. It is imperative that this knowledge is captured, documented and shared within the members and the wider industry, and be the guide for the future direction and future opportunities for the years to come. These reports also serve as foundations for market development activities as was the case in the past with gas heat pumps, mCHP, heavy duty engines, power generation, marine, hybrids and many others.

One report per year will be produced over the period, reflecting the areas that require attention, the needs of the industry and the market. Maintenance of existing past reports will be also pursued where considered necessary. Exploitation and follow up of recommendations from these reports may also be included as activities.

Technological direction and selection of focus areas can be driven through ad-hoc workshops, new technology roadmaps and technology summits.

WLPGA will continue promoting LPG applications, maintaining the web-based directory and the website - Exceptional Energy in Action (LPGApps), including its social media support and twitter feed with a target increase in followers of 50% year on year through the period. Sponsoring opportunities

from members and external resources will still be pursued if possible, to cover costs associated with the maintenance of the site, production of supporting materials, videos, case studies, brochures etc.

Exceptional Energy in Action, launched in 2014, is now the largest online directory of LPG applications in the world, directly impacting the image and perception of the LPG industry, helping to position LPG as an Exceptional Energy, stimulate the spread of new LPG applications technologies, and promoting the use and knowledge of LPG and its applications to a broader audience. The site and its specific applications will continue to be maintained and enhanced and communicated as widely as possible, with promotional materials, brochures videos as needed.

In support of Exceptional Energy in Action and following up recommendations from the produced studies and reports, WLPGA will also participate in selected exhibitions and conferences in key sectoral areas, including agricultural, gardening, construction and other related sectoral exhibitions.

Objective C2: Demonstrate the credibility of meeting at least 50% of the 2050 non-chemical LPG demand with renewable LPG.

Renewable fuels are globally on the rise, mainly because they are a way to reduce carbon emissions and thereby slow or halt climate change. Regulators, customers, end users and the LPG industry itself require fast expansion of renewable LPG and expect it to be a growing and ultimately a significant part of total supply and demand.

To this end, bioLPG appeared on the market in 2018 and WLPGA has already been active on this subject with two reports. A significant interest in this lowest carbon drop-in solution around the world was noted. In order to continue LPG's role in the energy transition, an increasing volume of renewable LPG will be required. Currently it is mainly produced as a by-product of renewable diesel/renewable jet fuel made via the so-called HVO (hydrotreated vegetable oil) technology. This type of renewable LPG, almost identical to fossil LPG, can constitute up to 8% of an HVO plant's capacity by volume. Production of renewable diesel is increasing, due to legislation and public pressure. Coming regulation of the airline industry – forcing it to use more renewable diesel – is expected to significantly grow demand for renewable diesel. Volumes of renewable LPG through this route are expected to grow as well. Co-processing of vegetable oils HVO feedstocks in existing oil refineries is also growing, biobutylene has also debuted commercially, and WLPGA will continue to promote these opportunities and particularly in existing infrastructure as an immediate priority.

The 'low hanging fruit' of HVO is indeed attractive, but HVO feedstock volumes and product demand are not enough to displace a large portion of the LPG market with renewables. Therefore, the LPG industry is also keen to explore and promote additional technology pathways that lead to increasing volumes of renewable LPG. Potential sources of feedstock for producing renewable LPG essentially fall into four categories: organic hydrocarbons from agricultural waste and residues; biomass and animal/vegetable oils/fats; recycled CO₂ from industrial sectors such as aluminium, cement, steel and possibly carbon capture and storage, recycled hydrocarbons from tyres, plastics and the organic fraction of municipal waste; and electrons, i.e. using renewable electricity to generate low-carbon hydrogen.

Aside from HVO, the technologies for conversion fall into three broad types: biomass-to-liquids (BtL), biomass-to-gas (BtG), and power-to-gas. They also might be defined to include renewable DME alongside or in substitution of renewable LPG.

There will not be a 'one size fits all' approach to renewable LPG production. The WLPGA will focus on encouraging and demonstrating routes that maximise available feedstock conversion to renewable LPG or its components. The focus will be on the three technology types that are pre-commercial: these

that need broad, consortium-type support that individual LPG companies cannot provide. Cooperation of and engagement with national and regional LPG Associations, as well as member companies will be key. WLPGA is envisaging to play a central facilitator role in these efforts and a partly dedicated resource is also being considered to assist.

Objective C3: Support the growth of LPG demand in specific end-use applications with a focus on cooking, transport and power generation.

Objective C3 addresses an important part of the WLPGA activities – namely supporting growth in premium (non-chemical) demand for LPG in various sectors. Since being launched in 2012 Cooking For Life has been successful in getting LPG recognised globally as one of the best solutions to address the health and environmental challenges associated with cooking with traditional fuels. Additionally, Cooking For Life has established WLPGA as the global hub for information on the benefits of switching to LPG in a development setting and as a conduit to the industry.

Building on the 2017 – 2019 strategic review objective, in 2020 – 2022 Cooking For Life programme will focus on moving closer to achieving the goal of facilitating the switch of one billion people from cooking with traditional fuels to LPG by 2030. This objective of switching an additional 150 million consumers to LPG will be achieved by continuing the successful initiative from 2017 – 2019 of partnering with key stakeholders and members to hold at least three in-country Cooking For Life workshops focusing on informing participants about the benefits of LPG as well as addressing challenges faced in their own markets and getting the industry to grow in a safe and sustainable manner.

Cooking For Life will also work with representatives of the Indian government to jointly identify countries of interest where the various Indian LPG initiatives to could feasibly work and will help to convene high level bilateral/inter-governmental meetings for engagement with these countries aimed at getting partner governments to learn from the Indian experience of increasing access to LPG.

The UNHCR is a key global stakeholder and joined the WLPGA as an observer member in 2018. The UNHCR and the WLPGA have formed a partnership to facilitate the goal of the UNHCR of transitioning 70m refugees from traditional fuel to LPG. The initial target (800,000) of the refugees in the Cox's Bazaar camp in Bangladesh has now been extended to Africa. This project includes the provision of technical and operational support to the UNHCR in order to successfully transition refugees, previously using traditional fuel such as wood, to safely using LPG with fit for purpose equipment.

In the coming period, WLPGA will work closely with the UNHCR (both in Geneva and in country), local WLPGA members and government officials, by providing technical and operational support, and guidance to the UNHCR transition programmes. The success of these partnerships will be communicated through regular communiques and during conferences, highlighting the social, health and environmental benefits (especially the impact on reducing carbon emissions) within the refugee camps.

Autogas was defined as the number one opportunity for the industry in the strategic review. It is a flagship application that can be leveraged to position the overall benefits of LPG. However, Autogas is sometimes seen as a fuel from the past and there is a lack of knowledge on its benefits among key stakeholders. The global focus on zero-emission mobility is currently driving the mobility debate. With the increased scrutiny on air quality and climate change, major markets and OEMs themselves have made public announcements to phase-out of both petrol and diesel vehicles. The role of sustainable mobility is seen as a vital pillar of the energy transition. Now is the time to influence and raise awareness on the environmental and societal benefits of Autogas to protect existing markets and

develop new ones. The challenge will be to ensure our share of voice among a crowded and EV-centric space. The goal is to bring Autogas to the forefront of the policy and environmental debate and position it as part of the solution now and in the future.

Specific objectives will include:

- Identify extended ecosystem on sustainable mobility: In order to understand the landscape, key global stakeholders influencing the debate need to be identified and analysed. The objective is to map out individuals, organisations, key media sources and international events that can be targeted to broaden the reach of Autogas and convey positive messaging & publications.
- Engage in a meaningful way: Being clear on the priority stakeholders, we will then need to engage with the right message to the right audience. Change and opportunity require a broader network, including policymakers, OEMs, consumers, media, and strategic organizations. Engaging beyond the LPG industry can provide a broader narrative to support our agenda.
- Prepare for the future: Building our global reputation will require a thoughtful and deliberate approach to issues that will resonate with key audiences. In order to stay relevant in on-going policy discussions around the energy transition and sustainable mobility, it will be imperative to focus efforts on positioning Renewable LPG as a long-term solution.

The Global Roadmap for Autogas, developed in 2018/19 is a key WLPGA publication that examines the global potential of Autogas in the vehicle fleet through to 2040. The report highlights that vehicle ownership rates in the emerging economies are still far below the saturation point, pointing to further strong growth in the global vehicle fleet over the coming decades. The focus under objective C3 will be to promote global Autogas growth by disseminating the information. We will do this by developing and executing a communication plan, including identifying the key messages we want to convey and to who. In other words, tailoring the messages and engagement for our target audiences. WLPGA will use the report as a hook to raise awareness and interest among a target list of key stakeholders in order to enable policies resulting in market growth. The report will also be promoted through social media channels, traditional media and direct market engagement. Other specific activities will include annual updates of the WLPGA Autogas Incentives Policies document.

Interest in LPG-fuelled marine engines is largely being driven by impending new regulations imposed by the International Maritime Organization (IMO) which will take effect in 2020. These new regulations will limit the amount of sulphur oxide emissions permitted in bunkering fuel. This has opened up an opportunity for LPG fuelled marine engines which can reduce sulphur emissions by up to 97% which will allow for full compliance with all current and future sulphur emissions requirements. LPG also offers efficiencies with LPG including easy storage, faster refuelling and wide availability of bunkering ships and facilities.

WLPGA has been working on promoting the feasibility and benefits of using LPG as a marine fuel for a number of years and the results of the strategic review demonstrate that many WLPGA members consider this segment as a potentially big opportunity for the industry in the future. The goal is to ensure that the industry has the right tools to make the most of this opportunity.

Specific objectives will include:

- Building on the successful work that WLPGA has done in highlighting this issue to the industry, the 2020 – 2022 period will continue with further efforts to raise the potential of LPG in the marine

segment. This will include representing the industry at key events and establishing clear and coherent advocacy and communications positions to bolster the case.

- Continued engagement with equipment manufacturers and OEMs so that they understand the opportunity that LPG engines can provide.
- Engagement with authorities, regulatory bodies and other key stakeholders through conferences, workshops and other events to promote understand of LPG and its use in marine applications.

Like marine applications, LPG-fuelled power generation offers the industry a large window of opportunity in certain situations. The work WLPGA has done on using LPG for power generation definitively shows that this sector is poised for growth due to factors such as growing demand for power, aging grid infrastructure, and lack of access to electricity as well as increasing construction and infrastructure investment across the globe. However, the single biggest challenge facing the industry in this segment is lack of awareness that the technology exists and is already being used around the world to provide power generation. The main aim of this objective is to raise awareness about LPG as a fuel for power generation systems.

Specific activities will include:

- Continuing to work with the current Working Group on LPG and Power Generation to promote the technology.
- Creation of at least three case studies over the next three years each highlighting a power generation system that is currently in operation.
- A multi-year communications campaign focused on outreach to key stakeholders at a variety of events to promote LPG as a solution for power generation. The stakeholders who should be approached include equipment manufacturers, policy makers, national LPG associations, multi-lateral institutions such as the World Bank and producers of LPG.

4. Analysis of funding requirements

One of the weaknesses of the WLPGA as highlighted, not this just in this review, but in previous editions, is the lack of resources to provide effective services to a global industry. Revenue is derived almost entirely from membership fees and commercial revenue from events – mostly the annual World LPG Forum. The WLPGA also has the ability to raise specific revenue from groups of members for special projects although this is not frequently done.

4.1 Historical analysis

During the period 2016 – 2018, total revenue has seen a 5.3% CAGR increase in the period compared to 5.6% in the period 2014-2016. Refer to Fig 4.1 below. This increase comes from growth in membership revenue (4.8% CAGR) and commercial revenue growth (5.7% CAGR), principally from for World LPG Forum.

Operating costs as a function of revenue have increased from 69% to 76% in the period 2016 – 2018 while salary costs as a function of revenue in the same period have increased from 33% to 34%. Overall the long-term trend shows revenue growth outpacing the growth in operating costs and salary costs providing greater available resources for projects.

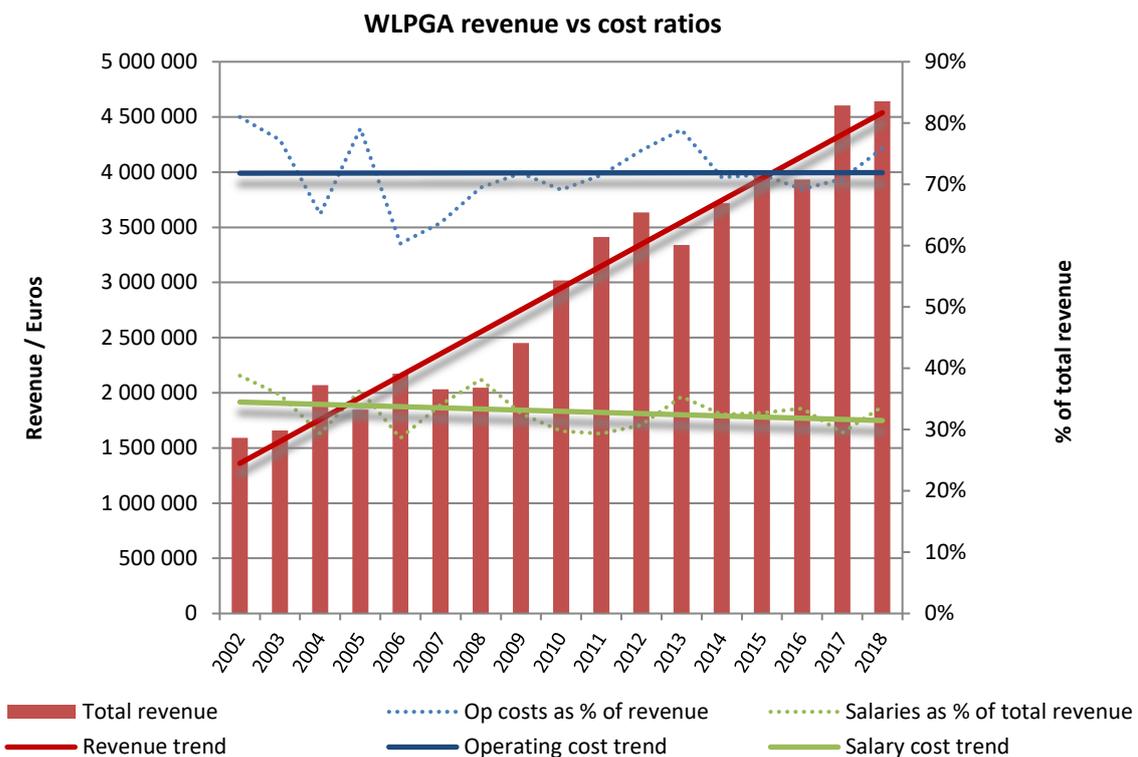


Fig 4.1 WLPGA revenue vs cost ratios

During the period 2017 – 2019 inc., the WLPGA aimed to increase its resources through increasing the absolute number of members (from 240 at the end of 2016 to 300 at the end of 2019). As shown in fig 4.2 below, the target of total members was achieved but this was due in part to the growth in observer members – a free category. Revenue targets were met however since the target for higher-paying member categories was generally exceeded.

It is important to note that the number of new members recruited in the period is anticipated to be 110 (a record for WLPGA), whereas the number of resignations is approximately 50 (also a record). It is clear that new membership tends to be more volatile and requires considerably greater effort for retention.

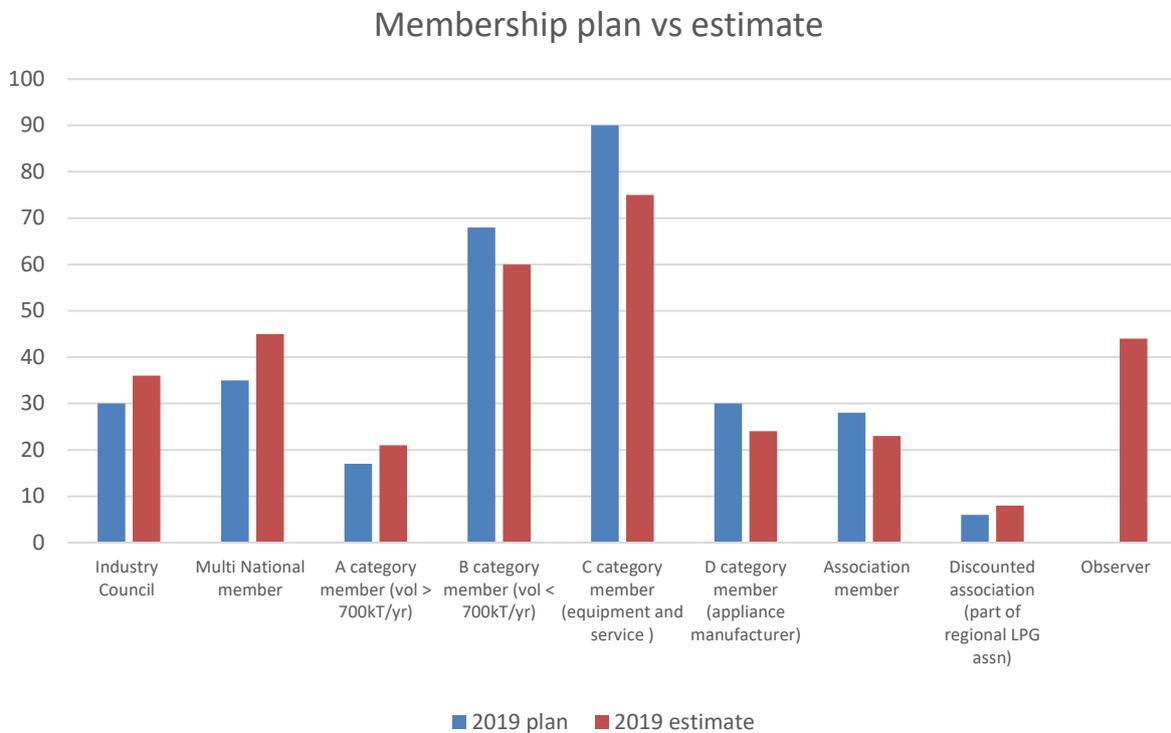


Fig 4.2 – Membership growth: Plan vs reality

During the period 2017 – 2019 WLPGA froze the membership fees whereas the French retail price growth index was on average 1.5% p.a. while the forecast for the period 2020 – 2022 inc. is for an average annual increase of 1.6% (source: IMF consumer price index for France). Importantly for WLPGA, operating costs increased by 6.9% CAGR between 2016 and 2018 – higher than the average retail price index due in particular to a salary budget increase from new additional staff and staff changes – all of which were deemed vital to fulfil the association objectives.

4.2 Funding requirements for proposed three-year plan

During the coming three-year period it is assumed that WLPGA operating costs will increase at 3% p.a. This is lower than the 6.9% experienced during 2016 – 2018 but it is assumed that there will be no net additions to the staff. The assumed increase is higher than the anticipated retail price increase and this is due to the expectation of a 3% p.a. salary inflation - broadly in line with the French market.

The anticipated project spend is shown in fig 4.3 below. The Advocacy goal is new and of high priority given the feedback from the review questionnaires. In order to effectively achieve the objectives under this goal, an increase in project budget compared to the previous three-year plan is envisaged. In addition, the objective related to renewable LPG is new and vital to the success of the three-year plan and this also adds to the overall project budget. Through reducing the spend in other areas and through focusing the WLPGA activities to three goals with nine objectives (compared to four goals and 19 objectives) the increase in anticipated project spend over the three-year period from 2020 – 2022 is limited to 40%.

STRATEGIC PLAN BUDGETS	2020	2021	2022
GOAL A ADVOCACY			
A1 Identify Stakeholders, Strategy, Comms Tools			
Stakeholder mapping & strategy	60,000	20,000	20,000
Global Advocacy Council	45,000	15,000	15,000
Communications tools	58,000	58,000	58,000
Sub Total A1	163,000	93,000	93,000
A2 Decarbonisation			
Content development	30,000	50,000	50,000
Content application	20,000	30,000	30,000
Content delivery	40,000	60,000	60,000
Sub Total A2	90,000	140,000	140,000
A3 SDGs			
Content development	10,000	10,000	10,000
Content application	10,000	10,000	10,000
Content delivery	25,000	25,000	25,000
Sub Total A3	45,000	45,000	45,000
TOTAL GOAL A	298,000	278,000	278,000

GOAL B Business Improvement			
B1 GIP guides, workshops			
Guides	15,500	15,500	8,000
Workshops	20,000	21,000	22,000
Sub Total B1	35,500	36,500	30,000
B2 Knowledge transfer, digitalisation, standards harmonisation			
Digitalisation	30,000	30,000	30,000
Statistical Review	33,000	33,000	33,000
Standards harmonisation	24,000	24,000	24,000
IMO	20,000	35,000	22,000
Sub Total B2	107,000	122,000	109,000
B3 Diversity			
WINLPG	40,000	40,000	40,000
Youth	10,000	10,000	10,000
Sub Total B3	50,000	50,000	50,000
TOTAL GOAL B	192,500	208,500	189,000

GOAL C Innovation & Business Growth			
C1 Promote new technology			
Technology roadmap and summit	15,000	0	0
Reports and studies - consulting support	13,000	13,000	13,000
Exceptional Energy in Action	30,000	35,000	35,000
GTC support	10,000	10,000	10,000
Sub Total C1	68,000	58,000	58,000
C2 Renewable LPG			
Renewable LPG estimate for consulting support	50,000	45,000	45,000
Sub Total C2	50,000	45,000	45,000
C3 Support growth in sectors (cooking, transport, power gen)			
Autogas communications and market support	55,000	55,000	55,000
UNHCR cooperation	15,000	16,000	23,000
Cooking For Life	23,000	23,000	17,000
Power Generation	10,000	10,000	10,000
Marine LPG	10,000	10,000	10,000
Sub Total C3	113,000	114,000	115,000
TOTAL GOAL C	231,000	217,000	218,000

TOTALS	Year 1	Year 2	Year 3
GOAL A	298,000	278,000	278,000
GOAL B	192,500	208,500	189,000
GOAL C	231,000	217,000	218,000
GRAND TOAL	721,500	703,500	685,000

Fig 4.3 – Forecast budget spend by goal

Given the anticipated increase in non-project related operating expenses, in order to cover the projected project spend, WLPGA revenues need to increase at approximately 8% p.a. during the period. To meet this, it is recommended to both increase membership fees - by 5% p.a. on all categories (except D category), and to increase the absolute number of members by 3% p.a. This would result in an addition of approximately ten (net) members per year bringing the WLPGA to 330 members by end 2022. These changes would increase the available budget for projects in line with the anticipated project spend per year although, since the budget available to projects increases year-on-year, there will be a requirement to draw down on WLPGA reserves in 2020 – by an amount that can be returned to the reserves in 2022. This is illustrated in Fig 4.5.

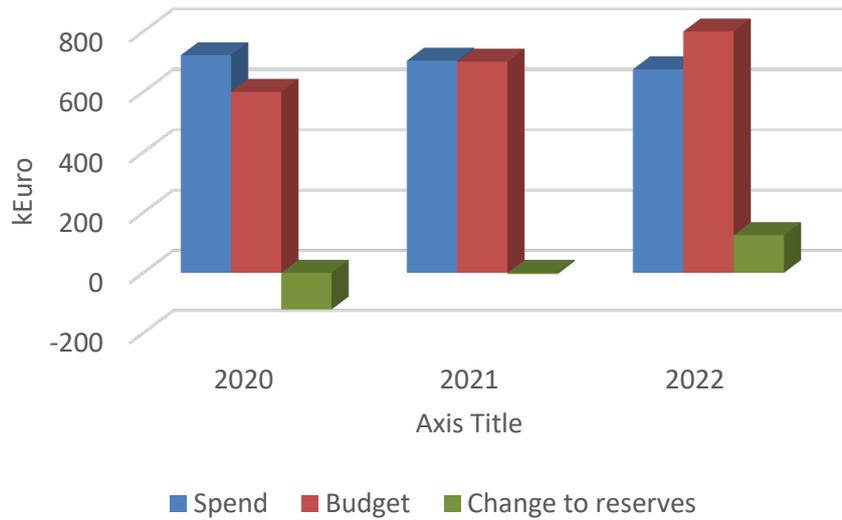


Fig 4.5 – Project spend vs budget during 2020 - 2022

5. Organisational structure



Fig 5.1 WLPGA Secretariat

From left to right:

Communications Coordinator, Mimi Brasseur

Digital Communications Manager, Camille Pieron

Technical Director, Nikos Xydas

Events Director, Esther Assous

CEO & Managing Director, James Rockall

Communications Director, Alison Abbott

Deputy Managing Director, Michael Kelly

Sustainable Mobility Director, Filipa Rio

Office and Member Relations Manager, Audrey Ginsz (missing)

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 working groups of members under the supervision of the Industry Council.

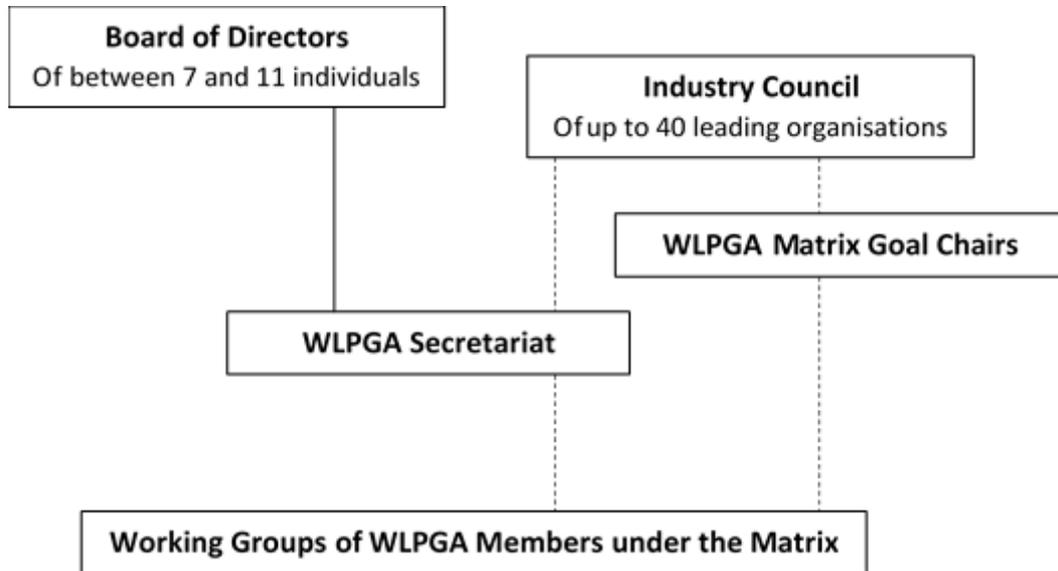


Fig 5.2 – Structure of WLPGA in period 2017 – 2019

The current structure was developed in order to be fully inclusive of all members while retaining powerful advisory groups in the form of the Board of Directors, the Industry and working groups of members, created on an ad-hoc basis to meet the requirements of the objectives under the goals.

The “Matrix” and the “Matrix Day” concept were adopted in the period 2017 – 2019 with the intention of improving member engagement in WLPGA projects and activities. A key aspect of the Matrix is the nomination, for the three-year period covered by the strategic review, of Goal Chairs, selected from WLPGA Industry Council member companies. The Goal Chairs are champions of the goal at the level of the Industry Council and are also instrumental in supporting delivery on the objectives by the secretariat.

The Matrix maps all of the WLPGA projects against the WLPGA goals and ensures that every activity of the organisation can be related to the mission. The Matrix Days that are organised three times per year in different parts of the world are intended to engage very specifically with projects from the matrix that are relevant to the members in that region. This enables WLPGA to be both global and local in its relation with the membership and ensures that the activities remain relevant across our broad geographic base.

In the period 2020 - 2022 greater effort will be dedicated to communicating with the membership on the purpose of the matrix and greater effort will be made to encourage member participation through web-based tools.

6. Measurement and reporting

A successful membership-based organisation sets its objectives in close consultation with its member stakeholders. Through the transparent strategic review process WLPGA does just this. Once objectives are agreed, WLPGA allocates its resources for their successful completion. The member stakeholders are requested to fund the WLPGA on an annual basis and it vital that they remain informed on progress versus targets.

A key element of WLPGA operations over recent years has been to ensure transparency in terms of WLPGA resource allocation to the agreed priorities set by the membership and the reporting of progress versus targets set. Only in this way can the WLPGA 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. For the current period these goals are:

- A) *Advocate LPG as part of the solution to future energy challenges*
- B) *Support efficient and responsible business*
- C) *Encourage innovation and support business growth*

For each of these goals, specific measurable objectives are agreed which relate to the priorities emerging from the strategic review. In the current period nine 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. 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 are added to the members only web site in the form of a “dash board”, allowing rapid communication of progress vs. objectives.

Appendix 1 – 2017 - 2019 review of performance

The 2017-2019 strategic plan identified four goals to be achieved over the three-year period. At the date of this report the WLPGA has completed two and a half years of its three-year plan and therefore the goals are not yet fully achieved. Nonetheless an analysis of the current completion can give a good indication of the degree of success of the overall plan and highlight any areas insufficiently addressed which may be considered for inclusion in the coming three-year plan.

The performance as measured against the annual targets is shown in table 1 below. According to the mid-2019 assessment of achievements it is estimated that the four goals to which we are working in the 2017 - 2019 period have the following levels of completion:

Table 1

	Goal	% Progress
A	Demonstrate the benefits of LPG and inform, educate and influence all stakeholders	93%
B	Support the development of LPG markets	95%
C	Promote compliance with standards, good business and safety practices	93%
D	Identify innovation and facilitate knowledge transfer	95%
TOTAL		93%

Goal A

Goal A consisted of five principle objectives. The first, A1 was in three parts: the preparation of a charter of benefits, a detailed stakeholder mapping and a series of specific communications campaigns. The charter of benefits was successfully completed in the first year and was prepared in a way that was simple for all interested stakeholders to access and use. This objective was further developed to include specific charter of benefits for specific segments including Autogas, power generation, marine and bioLPG. The stakeholder mapping process was conducted in year 1 and allowed for more targeted communication during the period, however it is recognised that there is an ongoing action to maintain the mapping and it will be continued into the next three-year period. Specific communications campaigns launched during the period under objective A1 included Autogas, Cooking For Life; Power Generation; Marine use and Exceptional Energy in the City. At the end of the period it is considered that objective A1 has been fully completed.

Objective A2 related to improving internal communications and ensuring that members can be active at supporting the overall external communications of the WLPGA. Through newsletters, website development, social media and physical meetings a large proportion of this objective was met. The specific objective of ensuring participation of at least 62.5% of members in the annual general assembly was not met.

Objective A3 related to participation at the annual LPG Forum and was exceeded in each of the three years of the plan. In addition, regional summits were held in New Delhi (twice), Beirut and Istanbul. Objective A4 related to Autogas and is considered fully met in terms of external communications with the preparation of the Global Autogas Roadmap and culminating in the first global Autogas Day at the time of the World LPG Forum in Amsterdam. Objective A5 was met with the IGU referencing LPG in their 2019 - 2021 triennial plan.

Overall it is expected that Goal A will be 98% complete by the end of the period.

Goal B

Spread over three objectives, market development was focused on Cooking, Autogas and three other applications over the period – power generation, heavy duty engines and marine use. Objective B1 related to the ongoing WLPGA project “Cooking For Life”. Through in-country workshops, the preparation of specific reports, cooperation with identified partners such as the Clean Cooking Alliance and the Global LPG Partnership and a dedicated communications campaign, the objective of converting 150 million people to LPG for cooking was met (with more than this number being achieved in India alone during the period).

Objective B2 was fully met albeit with varying degree of success. The focus on power generation saw the creation of a dedicated working group that continued through all three years of the plan and involved the publication of reports, case studies and in-country workshops. The development of the marine sector was also seen as very successful with a strong focus on Technology (as part of goal D) and Communications (as part of goal A). Heavy duty engines did not produce the same level of impact although a working group was formed and a report published.

Objective B3 related to the Autogas market and this was fully met with in-country support to Morocco, the USA and The Netherlands during the period. In addition, the Autogas Incentives Policy was updated and published on an annual basis.

Overall it is expected that Goal B will be 100% complete by the end of the period.

Goal C

At mid-2019 Goal C was 93% complete and fully expected to be 100% complete by the end of the year. Focus during the period 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 and three new guides for specific sectors were produced. The target for in-country workshops (of six in the period) was exceeded with ten having been completed by mid-2019.

Objective C5 related to diversity in the business had a focus on Women in LPG. The target for 1,000 members of the network by end 2019 was exceeded by 100% before the end of the period with more than 2,000 members. During the period, the average of the number of women employed in selected WLPGA member companies increased by 6.1%

In addition to the planned activities under goal C, WLPGA launched a number of activities related to the impact of the Internet of Things (IoT) on the business. A working group was formed, a report into the impact of IoT was prepared, a start-up competition was held and several webinars were conducted.

Goal D

The goal had 4 objectives. Objective D1 related to the preparation of new reports with a target of two per year. Over the period this objective was exceeded with nine new reports being released. Objective D2 covered the Exceptional Energy in Action applications directory and web site. The objectives under D2 were achieved in spite of not securing external funding.

Objective D3 was related to the annual; Global Technology Conference. This annual event was highly successful with delegate targets being exceeded each year. The main measurable objective was to achieve a 10% increase in abstracts received year-on-year and this was achieved already after the first year with a 130% increase.

Objective D4 concerned the preparation of training materials – specifically the preparation of six training modules with trainer notes and the successful application of the “train-the-trainer” concept in at least three countries. At the end of the period seven training modules had been completed while the “train-the-trainer” concept had been applied in five countries.

At the end of the period it is expected that Goal D will be 100% achieved.

Conclusion

It is expected that the overall completion of the goals set for the period 2017 - 2019 will be close to 100%. In this no account is taken of objectives being significantly exceeded (e.g. charter of benefits or good practice workshops). In some cases, additional activities have been included (e.g. the application of IOT in the business) for which no account is taken in the overall evaluation.

Appendix 2 – List of Focus interviewees

Focus interviews were completed by the following organisations/individuals:

Business type	Region	Company	Name
National association	Japan	Japan LP Gas Assn	Mr Yoshida
Regional association	Europe	LGE	Francesco Franchi
National association	Colombia	Gasnova	Alejandro Martinez
Regional association	LatAm	AIGLP	Riccardo Tonnieto
Producer	USA/global	Targa	Rob Donaldson
Distributor / marketer	Global	SHV Energy	Bram Gräber
Distributor / marketer	Global	UGI	Roger Perreault
Distributor / marketer	Global	DCC LPG	Henry Cubbon
Manufacturer	Global	Makeen	Lillian Christensen
Manufacturer	Global	Ragasco	Frederic Gausson
Manufacturer	Global	Cavagna	Davide Cavagna
Consultant	Global	IHS Markit	Walt Hart
Observer	Global	IGU	Luis Bertran
Observer	Global	GLPGP	Richendra van Leeuwen
Non-member	Global	Morris & Chapman	Simon Leysen
National distributor	Turkey	Aygaz	Gökhan Tezel
African distributor	Africa	Oryx	Blaise Edja
National association	USA	PERC	Tucker Perkins
National distributor	Brazil	Ultragaz	Mauricio Jarovsky
Integrated Co.	UAE	Emirates Gas	Nader al Farden
Media	Global	Argus Media	Phil Shaw
National distributor	Bangladesh	Omera	Tanzeem Chowdhury
Regional distributor	Middle East	Uinigaz	Mahmoud Sidani
National Association	Far East	Philippines LPGA	Mercy Pastrana
Manufacturer	Africa	Paygo	Nick Quintong

Appendix 3 – Focus interview questionnaire

BACKGROUND

The World LPG Association (WLPGA) is a not-for-profit association based in France with some 300 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 safer, 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 2016, a Strategic Plan Review was held which defined a set of objectives for the three-year period from 2017 until end 2019, to which all activities in the annual action plans for 2017, 2018 and 2019 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 safer, 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 the LPG sector has been undergoing major change coming from, amongst others:

- Increased LPG production particularly from US shale as well as new LNG projects.
- Expansion of trade routes with widening of the Panama Canal seeing larger US cargoes heading to Asian markets.
- Growth in demand from petrochemical sector and Asian residential sector.
- Emergence of new demand sectors in marine and power generation.
- Continued decline in the North American, Northwest European and Northeast Asian residential heating markets.
- A decline, after decades of growth, in the global Autogas demand. It remains to be seen if this is an aberration or the beginning of a structural decline.
- Increasing energy (and LPG) prices.
- Growing demand for butane vs increasing supply of propane leading to distinct market dynamics for butane and propane.
- Dramatic increase in focus from policy makers and civil society on energy decarbonisation, particularly in Europe, New Zealand and some parts of the US. At the same time the growth in the perception that electrification will solve all future energy challenges.
- Household air pollution and urban air pollution remain major opportunities for the sector
- Pressure on diesel and heating oil with many countries banning their use may provide opportunity to the LPG industry in the long term.
- Continued dramatic growth in the Indian domestic market linked to government policy, innovative programmes and heavy investment in infrastructure.

- Strong growth and potential in specific markets such as Bangladesh and Myanmar that are bright spots of opportunity for the industry.
- Climate change continues to be a big driver for many countries to try and reduce national emissions profiles and adhere to targets in agreed in the Paris accords. LPG is recognised as being helpful in achieving these goals.
- In terms of development there is increasing recognition that LPG is one of the best solutions available to reduce household air pollution related to cooking and achieve health, environmental, gender and emissions targets.

In this period the LPG industry has also continued to change. The trend of integrated oil companies exiting the business is persisting with the continued 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. 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.

The global LPG industry remains broadly split between mature and developing markets and WLPGA needs to position its future activities to provide value to both. 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 while ensuring maximum utilisation of the member resource.

At the beginning of 2019, a new strategic plan review will be carried out to cover the next three-year period until end 2022.

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 key long-term objectives for the WLPGA?

2) 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 safer, cleaner, healthier and more prosperous world”

Do you agree with this Vision? If not please elaborate

3) 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? if not please elaborate? Is there something we need to do more of or less of?

4) What do you see as the major strengths of the WLPGA?

5) What do you see as the major weaknesses of the WLPGA?

6) How should the LPG Industry be perceived externally? How is it actually perceived?

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

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

9) How can the WLPGA take advantage of these opportunities or mitigate any specific threats?

10) 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?

11) During the 2017-2019 Strategic Plan, membership fees were kept fixed while general operating expenses increased. WLPGA successfully completed its programs by increasing total membership but this growth risks diluting the service provided to individual members. What do you believe WLPGA should do in the coming period?

12) What are the strengths and weaknesses of WLPGA events (World LPG Forum, Regional Summits, workshops)?

13) WLPGA has created the Matrix to ensure that all activities under the current strategic plan are available for engagement with the membership at regular Matrix Day events. This is designed to engage members and leverage member (human) resource in WLPGA activities. What are the strengths and weaknesses of the Matrix?



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