

The natural gas industry in the United States and the Liquefied Natural Gas (LNG) sector especially has experienced a core shift over the past ten years. America's consumption and production has dramatically increased due to the ability to capture shale gas. Gas imports are declining and waves of new LNG production and exports are coming online to supply growing demand. These changes have opened global and domestic opportunities for LNG supply to new consumers. The international business case is focused on capturing exporting opportunities to new importing countries and fast-growing buyers; and the domestic business case is centered on identifying new domestic users for natural gas. LNG demand is primarily driven by the low cost of natural gas compared to oil-linked alternatives and environmental policy pushing the reduction of greenhouse gas emissions in power generation and in the transportation sector. The "Small Scale LNG" market encompasses the distribution of smaller volumes of LNG to support the needs of remote power generation (such as islands where a large-scale import terminal is not workable), and the fueling needs of ships, trucks, and locomotives. Small Scale is an emerging market with vast opportunity. There is a gap between what the LNG industry has done traditionally and what the market is demanding now. Bridging this gap, and helping its clients understand the best path for LNG development is what TSG is dedicated to doing through the efforts of its LNG Practice Group. **How Transnational Strategy Group Can Help** We help firms capture new market opportunities and provide domestic and international resources in support of their ventures.

- Washington-Based Government Relations: We provide clients a wide range of cost-effective "Washington office" services. TSG facilitates key relationships with the U.S. Department of Energy, U.S. Department of State, U.S. Department of Commerce, the Federal Energy Regulatory Commission, Congress and various advocacy groups that will support and promote projects. As needed, our Congressional experts implement advocacy campaigns on behalf of clients.
- International Government Relations: Leveraging its network of experts and partnership organizations based worldwide in many LNG importing nations, TSG can provide in-country expertise to its clients. This can be used to connect clients to potential LNG opportunities in key markets and provide a larger platform for companies who may not have employees stationed in that country.
- Finance Support: TSG experts in official and commercial financing are equipped to propose creative financing solutions and connect clients to key international and domestic funding sources.
- Sales and Supply Chain Strategy: Whether it is for clients interested in understanding how Small Scale LNG might fit into their portfolio and what markets might be interesting for them, or for those entering a new geographic market and requiring information on the existing political, economic and

energy agendas which could impact their business, TSG provides expert strategy advice to support development efforts of its clients.

- Strategic Partnership Origination: LNG projects require support from numerous private and public groups to be successful. TSG manages the development of strategic partnerships and the connections and relationships necessary for new and existing project development.

For Additional Information For further information, interested firms are invited to contact Dana Marshall, Langley Wall or Doug Hengel. Our Washington office telephone is +1-202-320-5499 and email: info@transnationalstrategy.com.

Liquefied Natural Gas (LNG) Practice Group

For more information on the services TSG can provide, please

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Ensuring an adequate and reliable supply of energy at affordable cost in an environmentally sustainable manner is a central objective for every society. Increasingly, governments at national and subnational levels and private sector actors are examining how existing trade.

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