

Responding to attack

Without political context, the US approach to energy would look like a study in contradiction. For decades, Americans have fretted about reliance on oil from faraway exporters thought to be unfriendly. Now, with reliance on imported oil shrinking, they should be happy. Yet the US political system is resisting developments with potential to keep imports in decline. Why the contradiction? In the energy politics of 2011, import dependency works better as a lever of polemics than as a metric of policy.

This observation is harsh. But it's the only explanation for opposition to recent developments promising not only to limit US reliance on oil from abroad but also to move sourcing closer to US borders.

Antidotes for anxiety

US oil imports have fallen since the financial crisis of 2007-08 because of consumption damped by economic recession and domestic production boosted by technical innovation. Consumption won't always bear the economic constraint. But oil imports can remain in check as deepwater production resumes, shale and other unconventional plays expand, and maybe as natural gas displaces oil. What's more, long-growing pipeline imports from Canada can increase further as production expands from the Alberta oil sands, backing out imports from less neighborly suppliers.

For anxiety over foreign oil, these developments represent strong antidotes. Yet hydraulic fracturing, a technology crucial to realization of the rich promise of oil and gas in low-permeability reservoirs, is under political attack. So is a proposed pipeline able to raise US supply from the Canadian oil sands by more than 500,000 b/d. So is deepwater work. And the attacks aren't limited to oil.

"We are at war," declares John Davies, chief executive officer of Davies Public Affairs of Santa Barbara, Calif. At PennWell Corp.'s Oil Sands and Heavy Oil Technologies Conference & Exhibition July 19-21 in Calgary, Davies quoted environmentalists asserting that antidevelopment campaigns have to do less with scientific facts than with "psychological warfare."

Industry groups have responded admirably to attacks on work important to domestic oil and gas supply with campaigns rich in facts. They have

responded aggressively to misrepresentations in the news media of hydraulic fracturing. They have shown how important deepwater exploration and production are to energy supply and Gulf Coast economies. They have projected the employment benefits of construction of the Keystone XL pipeline between Alberta and refining centers in Texas.

These are important efforts. If Davies is correct, however, the facts on which industry responses to environmental opposition pivot aren't enough. Environmentalists circumvent facts by appealing to fear.

In Calgary July 21, Davies concentrated on the "baby-boom" generation, which he said has changed American culture at every stage. Members of that generation, oldest members of which are entering retirement, fear the unknown, change, and insignificance. They thus oppose change and feel hostile and in need of a cause. According to Davies, they exhibit another characteristic that deserves heed from the oil and gas industry's architects of persuasion. Baby-boomers, Davies said, are "not seeking a solution."

This judgment helps explain how modern energy politics so readily turn obstructionist. Opposing activity—hydraulic fracturing, transcontinental pipelines—is easier than solving problems—ensuring supply of affordable energy, lowering imports from possible hostile countries. Determined obstructionists know how to exploit the difference. The target of many determined obstructionists nowadays is not oil from outside the US but oil itself.

Feeling defensive

In the modern political context, contradictions aren't logical problems; they're barrages from different directions. In modern energy politics, the oil and gas industry is not engaged in an argument; it is, as Davies asserts, at war. Saying so is unsettling. It feels defensive. To such concerns, Davies has a response. He asked his Calgary audience a rhetorical question that went something like this: "If your family members were under attack, what would you do? You'd defend them. Why don't you treat your industry the same way?"

The question is important—unless you think the attack is unreal or part of someone else's war.