

YEAR IN REVIEW



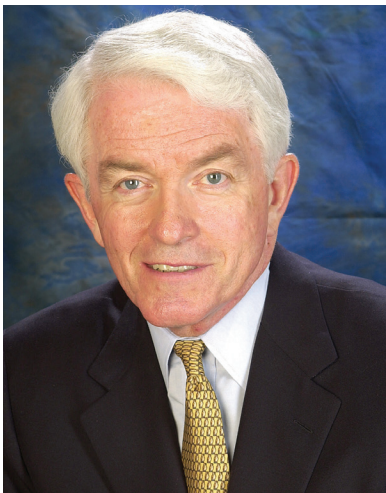
INSTITUTE FOR 21ST CENTURY ENERGY | U.S. CHAMBER OF COMMERCE



www.energyxxi.org

A MESSAGE FROM THOMAS J. DONOHUE

"The U.S. Chamber's Institute for 21st Century Energy continues to provide excellent leadership and analysis in an area that is transforming America's economy. The Institute's *Energy Works for US* platform will create millions of jobs, billions of dollars of revenue, and trillions of dollars of private investment and help make America an energy superpower. There is no question that the work of the Institute to build support for a pro-growth energy policy is making a big impact across the nation."



Thomas J. Donohue
President and CEO
U.S. Chamber of Commerce

OUR MISSION



The mission of the U.S. Chamber of Commerce's Institute for 21st Century Energy is to unify policy makers, regulators, business leaders, and the American public behind a common sense energy strategy to help keep America secure, prosperous, and clean. Through policy development, education, and advocacy, the Institute is building support for meaningful energy action at the local, state, national, and international levels.



The U.S. Chamber of Commerce is the world's largest business federation representing the interests of more than 3 million businesses of all sizes, sectors, and regions, as well as state and local chambers and industry associations.

U.S. CHAMBER OF COMMERCE

A MESSAGE FROM THE PRESIDENT AND CEO

America is in the midst of an energy revolution. Our nation has all the natural resources, technology, workforce, capital and entrepreneurial spirit needed to usher in a new era of energy abundance.

Energy has been by far the most successful sector of American industry over the past several years. In fact, the energy industry has been one of the largest contributors to bringing down America's unemployment rate with well-paying jobs. Thanks to our vast conventional and unconventional oil and gas resources, several hundred year's supply of coal, reliable nuclear energy, and increasing renewable sources, we can truly become an energy superpower and add jobs and generate investment and tax revenue for decades to come.



But the American energy revolution is not a foregone conclusion. We face continued threats from onerous regulations, policy inertia, and misinformation campaigns that could impact progress at every level.

Here at the Institute for 21st Century Energy, we've made it our mission to make sure that revolution becomes a reality. Over the past year, we've crisscrossed the nation and the world to educate and advocate on behalf of our great energy opportunity.

The centerpiece of our efforts is our new *Energy Works for US* platform, which provides 64 specific recommendations in 9 key policy areas that will ensure that America achieves its full energy potential. You'll read about this platform in this book, and also see how we're marshalling our resources to promote our agenda.

The Energy Institute continues to convene leading policy and thought leaders for rational, forward thinking discussions about our energy future. Our groundbreaking Energy Security Index series has gained traction in academia and amongst policy experts as a reliable way to track progress both at home and abroad.

On the advocacy front, we're experiencing record numbers of visitors to our website and social media channels, and are rapidly gaining advocates across the country who are introducing us to new audiences. We continue to be a go-to voice for media both in Washington and in the states on the leading energy issues of the day. When called upon, we're not afraid to fight for our principles in court, on the web and in print, or to mobilize our grassroots network to help influence change.

We're excited about the opportunities that lie ahead, and we appreciate the support we received in 2013. With your continued help, America's energy revolution won't be denied.

Sincerely,

A handwritten signature in black ink, appearing to read 'K. Harbert'.

Karen Alderman Harbert

THE FOUNDATION

The Institute for 21st Century Energy at the U.S. Chamber of Commerce was founded on the principle that energy is vital to our national and economic security. In 2008, we presented our Blueprint to Secure America’s Energy Future to the Administration and Congress. Much has changed for our nation’s energy future over the past five years. Now, to reflect America’s energy revolution and our changing policy and fiscal environment, the Energy Institute has released a new platform: *Energy Works for US*. We’ll continue to advance our principles in Washington, across the nation, and around the world.

TABLE OF CONTENTS

1	Promoting a Pro-Growth Energy Platform	3
2	Building a Bridge Between the States and Washington	11
3	Demonstrating National and International Thought Leadership	17
4	Expanding Our Reach	23

1

CHAPTER

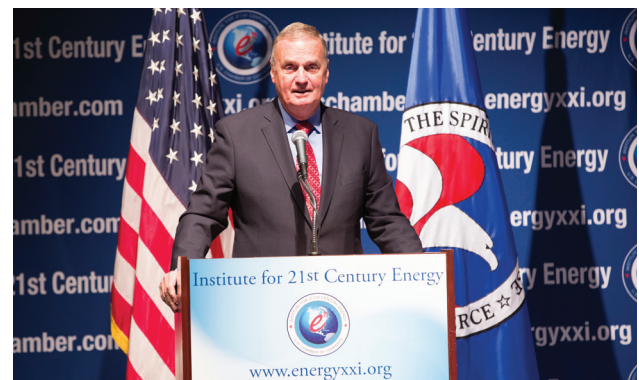
Promoting a Pro-Growth Energy Platform



While the American energy picture has changed, our policy framework has not. Recognizing the need for a sound strategy to unleash the energy revolution, we spent much of 2013 developing a new platform: *Energy Works for US*. Our 64 policy recommendations collectively will create millions of jobs, billions in revenue, and trillions in investment.



Karen Harbert introduces the U.S. Chamber's new energy policy platform, *Energy Works for US*, a plan to unleash America's energy revolution.



General James Jones, former president and CEO of the Institute for 21st Century Energy, discusses the national security implications of energy.



U.S. Chamber President and CEO Thomas Donohue unveils the Energy Institute's new *Energy Works for US* platform.

ENERGY

Works For US



Remove Barriers to Increased Domestic Oil and Natural Gas Exploration and Production and Fuel Manufacturing



Maintain Coal's Role as a Vital Part of a Diverse Energy Portfolio



Expand Nuclear Energy Use and Commit to a Nuclear Waste Solution



Enhance the Competitiveness of Renewable Sources of Energy



Promote 21st Century Energy Efficiency and Advanced Technologies



Modernize the Permitting Process for Our Nation's Energy Infrastructure



Protect Our Energy Infrastructure from Physical Disruptions and Cyber Attacks



Reform the Regulatory Process for Balance, Predictability, and Transparency



Ensure a Competitive Energy Workforce



INSTITUTE FOR 21ST CENTURY ENERGY
U.S. CHAMBER OF COMMERCE

The *Energy Works for US* platform drew widespread attention when it was launched. The Energy Institute developed a new website to feature the 9 key policy planks, and included videos, key facts, and a toolkit for state and local chambers of commerce. Our website saw all-time highs in web traffic, and copies have been provided to policy makers and energy advocates around the country.

US Chamber Proposes Reforms to Reflect New Energy Revolution

ENERGY Works For US
Read our plan to secure America's energy future.

Watch our introductory video

Policy Planks:

- Remove Barriers to Increased Domestic Oil and Natural Gas Production and Fuel Manufacturing
- Maintain Coal's Role as a Vital Part of a Diverse Energy Portfolio
- Expand Nuclear Energy Use and Commit to a Nuclear Waste Solution
- Enhance the Competitiveness of Renewable Sources of Energy
- Promote 21st Century Energy Efficiency and Advanced Technologies
- Modernize the Permitting Process for Our Nation's Energy Infrastructure
- Protect Our Energy Infrastructure from Physical Disruptions and Cyber Attacks
- Reform the Regulatory Process for Balance, Predictability, and Transparency
- Ensure a Competitive Energy Workforce

KEY FACTS

- 110%** There has been a 110% increase in coal exports over the past five years.
- 40%** Power generation accounts for 40% of U.S. energy consumption.
- 80%** More than 80% of the nation's energy infrastructure is owned and operated by the private sector.

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Coal
Maintain Coal's Role as a Vital Part of a Diverse Energy Portfolio

Coal is an indispensable foundation of the U.S. energy mix. But the EPA has begun issuing a rash of new regulations that are making it difficult to operate coal plants and virtually impossible to build a new ones.

Coal remains an affordable and reliable source of energy, and is necessary to generate the electricity Americans demand around the clock. We must continue to find ways to use coal more efficiently, and invest in technologies that reduce emissions. Steps should be taken to limit the harm from new and proposed rules that aim to curtail the use of one of our most abundant and secure sources of energy, ultimately harming businesses, consumers and the overall economy.

Nuclear
Expand Nuclear Energy Use and Commit to a Nuclear Waste Solution

Nuclear energy is a key source of electric power and has operated safely in the United States for decades, with no emissions. Nuclear energy produces about one-fifth of the electricity we consume and accounts for nearly two-thirds of the country's emissions-free power generation. Currently, the U.S. generates more electricity from nuclear power than any other nation. Nuclear reactors operate at about a 90% capacity factor, higher than any other fuel type, and efficiency gains since 1960 have resulted in a 40% increase in electricity generated without building new plants.

U.S. Sources of Electricity From Electricity 2012

Source	Percentage
Nuclear	21.1%
Coal	33.1%
Natural Gas	36.1%
Renewables	10.1%
Hydro	7.1%
Wind	2.1%
Solar	0.1%

Finding a Solution to Nuclear Waste Storage and Disposal

Efficiency
Promote 21st Century Energy Efficiency and Advanced Technologies

More efficient use of our vast energy resources remains an important component of America's long-term energy strategy. Leveraging policies, markets and technologies that promote energy efficiency has generally been the lowest-cost, fastest way to meet our energy demand. The projected peak of energy demand for the U.S.—energy use per unit of GDP—is expected to continue to improve to an even greater extent than in the previous four decades. Today, it takes just half of the amount of energy to produce a dollar of GDP that it did in 1970.

Encouraging the development and economic use of advanced energy technologies should be an integral part of our energy policy. America's scientists and engineers must be challenged to accelerate breakthroughs in the cost-effectiveness and performance of renewable, nuclear, fossil, energy storage, smart-grid and many other technologies that have the potential to alter the way energy is produced, delivered and consumed.

Will Upward Trends in Energy Efficiency Continue?

Residential and commercial buildings account for 40% of U.S. energy consumption. Residential energy efficiency has improved by just one percent per year, whereas commercial buildings have improved greatly in recent years. High energy prices, coupled with a high percent of U.S. energy use that has not, accelerated energy savings.

The industrial sector consumes 31 percent of U.S. energy use and has not, accelerated energy savings. About 60 percent of industrial energy use is associated with motors, steam, compressed air, pumps, fans, process heating, combustion loss, and electricity. New office and technologies and better energy management devices can spur significant energy savings.

Because bulk electricity is not easily stored, supply must equal demand. New regulatory models could reward saving electricity through the implementation of energy efficiency programs and new incentives to conserve and reduce.

Energy Intensity

Year	Energy Intensity (Btu per dollar of GDP)
2000	~1.0
2001	~1.0
2002	~1.0
2003	~1.0
2004	~1.0
2005	~1.0
2006	~1.0
2007	~1.0
2008	~1.0
2009	~1.0
2010	~1.0
2011	~1.0
2012	~1.0

Power generation accounts for 40% of U.S. energy consumption.

The Energy Institute continued its tradition of hosting key policy makers for thoughtful discussions on energy issues.



House Majority Leader Eric Cantor addresses the Energy Institute's Leadership Council.




Karen Harbert greets Representative Tom Reed before an Energy Institute hosted roundtable discussion on the "Impact of Increased Natural Gas Resources: Economies, Diversity, and Reliability."



House Majority Whip Kevin McCarthy shares his thoughts and goals and the agenda of the House Energy Action Team (HEAT) during an off-the-record discussion with the Energy Institute's Leadership Council.

The Chamber regularly weighed in on key energy legislation.

KEY VOTE *ALERT!*



U.S. CHAMBER OF COMMERCE
Congressional & Public Affairs
1615 H Street, NW
Washington, DC 20062
202-463-5600


May 22, 2013

Key Vote letter on H.R. 3, the "Northern Route Approval Act"

TO THE MEMBERS OF THE U.S. HOUSE OF REPRESENTATIVES:

The U.S. Chamber of Commerce, the world's largest business federation representing interests of more than three million businesses of all sizes, sectors, and regions, as well as state and local chambers and industry associations, and dedicated to promoting, protecting, and

KEY VOTE *ALERT!*



U.S. CHAMBER OF COMMERCE
Congressional & Public Affairs
1615 H Street, NW
Washington, DC 20062
202-463-5600

June 25, 2013

Key Vote letter on H.R. 1613, the "Outer Continental Shelf Transboundary Hydrocarbon Agreements Authorization Act" and H.R. 2231, the "Offshore Energy and Jobs Act"

TO THE MEMBERS OF THE U.S. HOUSE OF REPRESENTATIVES:

KEY VOTE *ALERT!*



U.S. CHAMBER OF COMMERCE
Congressional & Public Affairs
1615 H Street, NW
Washington, DC 20062
202-463-5600

July 23, 2013

Key Vote letter on H.R. 2218, the "Coal Ash Recycling and Oversight Act of 2013"

TO THE MEMBERS OF THE U.S. HOUSE OF REPRESENTATIVES:

The U.S. Chamber of Commerce, the world's largest business federation representing the

Energy Institute leaders are sought after experts on hot policy topics. In 2013, we testified in front of the House of Representatives and at hearings on EPA regulations.



Christopher Guith before the House Committee on Natural Resources.

"Onshore production is quickly moving the country towards greater energy security, but we still have a long way to go. Responsibly increasing offshore production is the next important step towards less imported oil and less energy security risk."

– Christopher Guith, June 6, 2013



Karen Harbert testifies before the House Energy and Commerce Committee's Subcommittee on Commerce, Manufacturing, and Trade about "Keystone's Red Tape Anniversary: Five Years of Bureaucratic Delay and Economic Benefits Denied."

"The failure of the federal government after five years to grant a construction permit for the Keystone XL pipeline exemplifies perhaps better than anything the challenges of building energy infrastructure in the United States. This failure has not only denied Americans the benefits of the economic shot in the arm this project would provide, it also has tarnished America's image as a "can do" country open to investment, a failure that can be difficult to shake from investors' minds."

– Karen Harbert, September 19, 2013



Karen Harbert testifies at an EPA listening session in Washington, D.C., on proposed carbon pollution standard for new power plants.

"It is difficult to overstate the economic threat presented by these regulations, which together with other EPA rules could wipe out an entire industry—something Congress surely never contemplated."

– Karen Harbert, November 7, 2013

Industry leaders and policy makers alike can count on the Energy Institute to provide a forum to make news and deliver messages to a wide audience.



Thomas F. Farrell II, Chairman, President, and CEO of Dominion Resources, addresses the audience at the CEO Leadership Series luncheon.



Representative James Lankford (OK) addresses the Energy Institute's Leadership Council.



Representative Tim Murphy (PA) addresses the audience at a meeting hosted by the Energy Institute.



Alaska Governor Sean Parnell makes a major announcement regarding the State's pursuit of offshore resources at a press conference hosted by the Energy Institute. Governor Parnell was joined by Dan Sullivan, former Commissioner of the Alaska Department of Natural Resources, and other Alaska leaders.



FOCUS

Bringing Our Case
to the Courts

The Washington Times

U.S. judge tosses 'arbitrary'
SEC Oil Payment disclosure rule

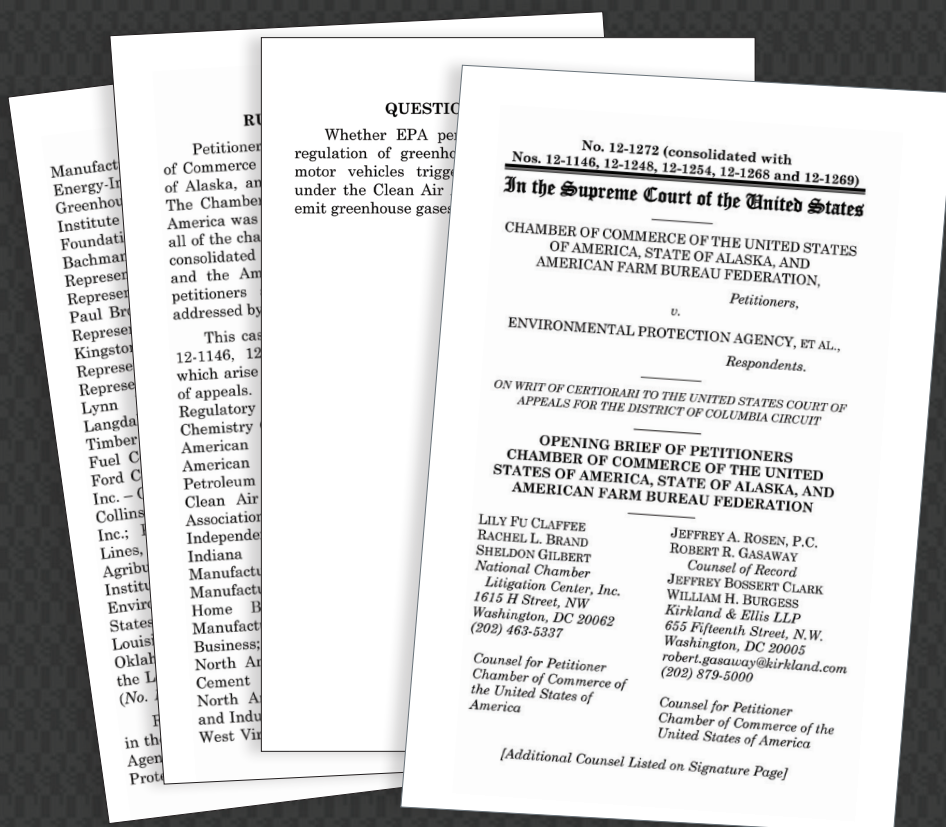
The Energy Institute actively supports businesses and consumers through the Chamber's in-house law firm, the National Chamber Litigation Center (NCLC). In 2013, the Institute was involved in 24 cases, and has a total of 15 pending. Among the 11 cases decided in 2013, our position prevailed in 7 of them.

ENERGY CASES

24
cases
active or
pending

11
decisions
in 2013

7
victories
in 2013

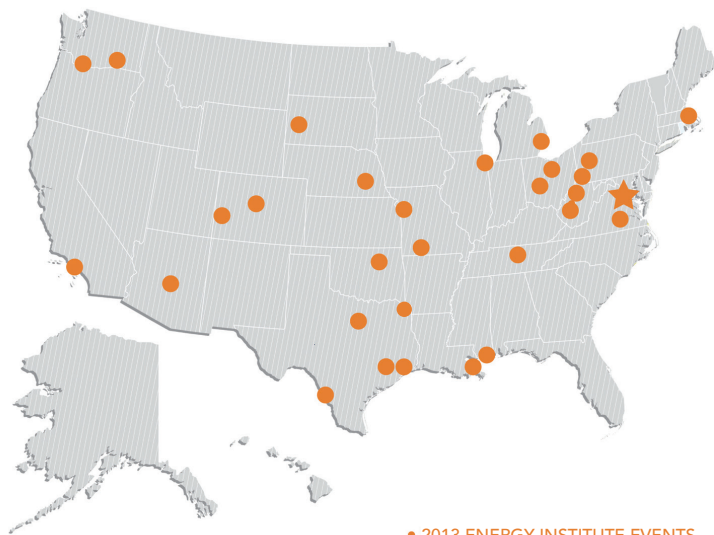


CHAPTER 2

Building a Bridge Between the States and Washington



Over the course of 2013, Energy Institute leaders headlined over 109 events in 20 states and 7 countries that reached an estimated audience of over 24,000.



Akron, OH
Bay Town, TX
Biloxi, MS
Boston, MA
Branson, MO
Canonsburg, PA
Charleston, WV
Chicago, IL

Columbus, OH
Dallas, TX
Detroit, MI
Grand Junction, CO
Houston, TX
Kansas City, MO
Keystone, CO
Laredo, TX

Lincoln, NE
Louisville, KY
Nashville, TN
New Orleans, LA
Pasco, TX
Pittsburgh, PA
Richmond, VA
Rapid City, SD

Santa Barbara, CA
Scottsdale, AZ
Tulsa, OK
Vancouver, WA
Washington, DC
Wheeling, WV



BILOXI, MS — Karen Harbert sits on a panel to discuss “America’s Energy Perspective” with Harry Alford (National Black Chamber of Commerce), David Holt (Consumer Energy Alliance), Roger Bernstein (American Chemistry Council), moderated by Barry Cannada (Mississippi Energy Institute).



KENNEWICK, WA — Christopher Guith and Mike McWhorter, Chairman of the Tri-City Regional Chamber of Commerce Board, present Representative Doc Hastings with the U.S. Chamber's Spirit of Enterprise award.



CHARLESTON, WV — Karen Harbert and West Virginia Chamber President Steve Roberts present Congresswoman Shelley Moore Capito with the Spirit of Enterprise award at the West Virginia Chamber of Commerce.



CANONSBURG, PA — Karen Harbert makes remarks at the Mylan Classic Energy Symposium hosted by the Washington County Chamber of Commerce.



PITTSBURGH, PA — Dan Byers meets with Dewitt Peart, President of the Greater Pittsburgh Chamber of Commerce, and his members to discuss EPA's proposed carbon pollution standards for power plants.



LOUISVILLE, KY — Karen Harbert participates on a panel, "Energy Policies Impacting Manufacturing," at the Southern Governors' Association's Annual Meeting.

When called upon, the Energy Institute does not hesitate to engage our grassroots activists across the nation on behalf of sound energy policy.

The Energy Institute is part of the Alliance for Northwest Jobs and Exports, an alliance formed in Washington state in support of building a coal export terminal there that would create jobs and generate much-needed local revenue. Activists—many of whom oppose the use of coal itself—are seeking to block construction of the terminal.



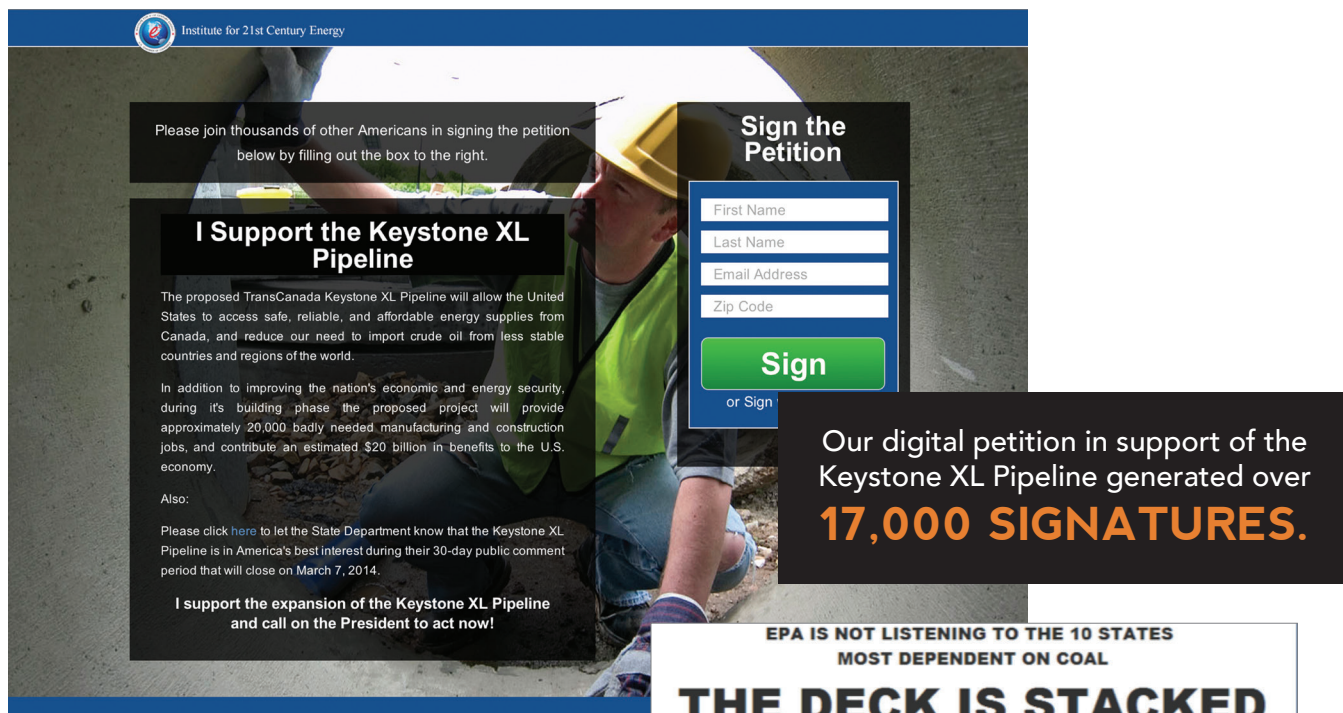
TACOMA, WA — Karen Harbert leads a rally in support of a new export terminal.

The Institute remained a national leader in the effort to build the Keystone XL pipeline. The Institute generated thousands of signatures on a petition in support of Keystone and kept the pressure on the Obama Administration to support the pipeline.



LINCOLN, NE — Karen Harbert strategizes on a conference call with Keystone XL pipeline supporters in Nebraska.

The Energy Institute has continued to promote its platform through **DIGITAL AND SOCIAL MEDIA**. The website welcomed more than **65,000 VISITORS** from **50 STATES** and **149 NATIONS**.



The screenshot shows the Energy Institute's website with a petition form for the Keystone XL Pipeline. The form includes fields for First Name, Last Name, Email Address, and Zip Code, along with a 'Sign' button. A text box on the left states: 'I Support the Keystone XL Pipeline. The proposed TransCanada Keystone XL Pipeline will allow the United States to access safe, reliable, and affordable energy supplies from Canada, and reduce our need to import crude oil from less stable countries and regions of the world. In addition to improving the nation's economic and energy security, during its building phase the proposed project will provide approximately 20,000 badly needed manufacturing and construction jobs, and contribute an estimated \$20 billion in benefits to the U.S. economy. Also: Please click [here](#) to let the State Department know that the Keystone XL Pipeline is in America's best interest during their 30-day public comment period that will close on March 7, 2014. I support the expansion of the Keystone XL Pipeline and call on the President to act now!'

Our digital petition in support of the Keystone XL Pipeline generated over **17,000 SIGNATURES**.

The Energy Institute also pressured EPA to add listening sessions in communities that will be negatively impacted by proposed regulations. Most of EPA's outreach took place in states without a great deal of coal production.



EPA IS NOT LISTENING TO THE 10 STATES MOST DEPENDENT ON COAL

THE DECK IS STACKED

THE 10 MOST COAL DEPENDENT STATES: VS **STATES THAT HAD EPA LISTENING SESSIONS:**

The infographic shows two hands holding cards. The left hand holds 10 cards, all labeled 'LISTENING SESSIONS'. The right hand holds 11 cards, all labeled 'LISTENING SESSIONS'.

WHY DOESN'T EPA WANT TO HEAR FROM CONSUMERS WHO ARE MOST DEPENDENT ON COAL?

The Environmental Protection Agency held "listening sessions" to help guide new regulations on all of our nation's electricity generation facilities.

America gets 40 percent of our electricity from coal—some states get as much as 95 percent. Yet EPA did not visit any of the top ten states most reliant on coal for their electricity.

EPA should listen to them, too.

Tell EPA to Add Listening Sessions

FIRST LAST
EMAIL ZIP
Take Action

The Energy Institute's **FACEBOOK** and **TWITTER** following continues to grow and build relationships with advocates nationwide.

Institute for 21st Century Energy shared a link.
April 8, 2013

The Keystone XL pipeline will improve our nation's economic and energy security. If you support the pipeline – and the 20,000 jobs it will create – sign our petition!

<http://www.energyxxi.org/keystone-petition>

I Support the Keystone XL Pipeline
www.energyxxi.org

The proposed TransCanada Keystone XL Pipeline will allow the United States to access safe, reliable, and affordable energy supplies from Canada, and reduce our need to import crude oil from less stable countries and regions of the world.

Like · Comment · Share 344 28 42

Energy Institute @Energy21 · Dec 2
Shale energy is putting money in your wallet. Learn more at energyxxi.org.
#CyberMonday #tracking pic.twitter.com/v3p0LwfFVN

SHALE ENERGY IS PUTTING MONEY IN YOUR WALLET

Shale energy directly benefits everyone – the **average American household** will see over **\$2,000** in additional disposable income as a result of shale production by 2025.

\$1,200 **\$3,500**

2012 2025

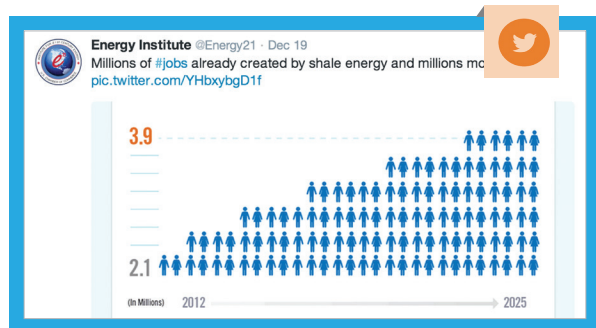
Monetary Benefits, Per Household

Source: IHS report *America's New Energy Future: The Unconventional Oil & Gas Revolution and the U.S. Economy*

INSTITUTE FOR 21ST CENTURY ENERGY
U.S. CHAMBER OF COMMERCE

WWW.ENERGYXXI.ORG

RETWEETS 19 FAVORITES 6



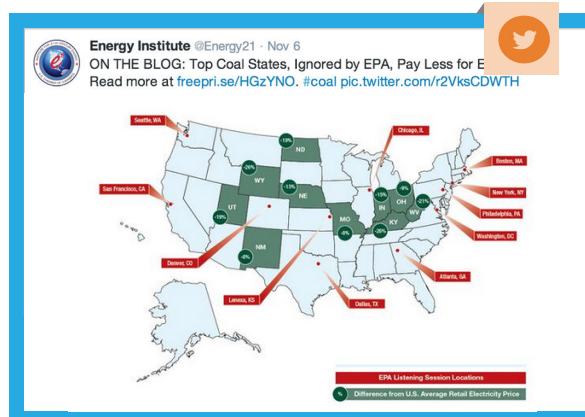
Energy Institute @Energy21 · Apr 8
Are you in favor of #KeystoneXL and increased #energysecurity? Name to show your support: bit.ly/14RVkAn

Expand Reply Retweet Favorite More

Institute for 21st Century Energy shared a link.
December 23, 2013

Have you heard about EPA's selective hearing problem?

Tell EPA to Add Listening Sessions
www.energyxxi.org



@Energy21

3

CHAPTER

Demonstrating National & International Thought Leadership





WASHINGTON, D.C. — Karen Harbert participated in the launch of the American Shale and Manufacturing Partnership, a diverse group of organizations and industries united in a singular goal of fostering an American manufacturing renaissance through sound analysis.

The Energy Institute is committed to a robust dialogue and scholarship in support of our ideas. Our experts travel around the country and across the globe to share their analysis and help build the case for investment in American energy.



DALLAS, TX — Karen Harbert hosts a panel discussion on energy growth and regulation in the United States at the Bush Institute's Conference on Energy Regulation.



HOUSTON, TX — Karen Harbert discusses the impact of shale oil and gas development on energy infrastructure investments at the Women's Global Leadership Conference in Energy and Technology.

Taking the Energy Institute message around the world.



BERLIN, GERMANY — Steve Eule participates on a panel to discuss the Transatlantic Trade and Investment Partnership at the American Institute for Contemporary German Studies (AICGS) conference.



MADRID, SPAIN — Steve Eule speaks about the U.S. energy boom and its impacts on cross-Atlantic trade and competitiveness at the Spanish Chemical Industry Business Federation (FIEQUE) Conference on the United States and Mexico.



TOKYO, JAPAN — Christopher Guith addresses the crowd at the Japan Atomic Industrial Forum (JAIF) Annual Conference.

The Energy Institute was at the forefront of the national discussion on energy exports in 2013. Now that it is clear that the U.S. has abundant energy supplies, we're challenging outdated assumptions from years ago on export and trade policy.



WASHINGTON, D.C.—Karen Harbert discusses the America's energy exports and global energy trade at the Association of Women in International Trade (WIIT) conference.



CALGARY, CANADA — Matt Koch discusses oil sands exports and trade relationships at the 12th Annual Oil Sands Symposium hosted by the Canadian Institute.

Our Steve Eule once again participated in the United Nations Climate Change Conference, which was in Warsaw in 2013. The Energy Institute is a founding member of the Major Economies Business Forum on Energy Security and Climate Change, which plays an active role in generating discussion at UN conferences by providing a way for the business community to be heard.



WARSAW, POLAND — Steve Eule represents the U.S. Chamber of Commerce at the United Nations Climate Change Conference (COP19/CMP9).



The Energy Institute worked with IHS to produce a comprehensive three-part study detailing the economic opportunities associated with shale energy production. The final phase of this analysis was released in 2013, and it revealed the benefits of shale on American manufacturing and other sectors of our economy.

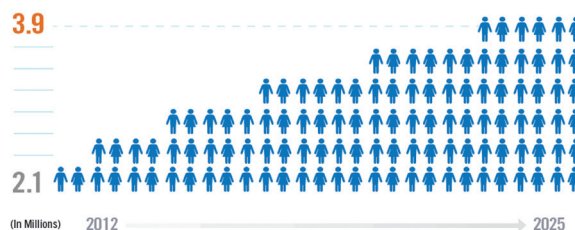


The Energy Institute promoted the findings of the report through infographics shared on the website and social media channels.



SHALE ENERGY IS CREATING JOBS

Shale energy has already created millions of well-paying jobs for Americans and will support nearly 2 million more by 2025.



Source: Energy Future: The Unconventional Oil & Gas Revolution and the U.S. Economy



SHALE ENERGY IS GENERATING GOVERNMENT REVENUE

With **government budgets** facing increased fiscal strain, **shale energy** is providing federal, state, and local governments with much needed revenues. By 2025, shale energy will have **generated over a trillion dollars** in government **revenues**.

Government Revenue in Billions



Source: IHS report America's New Energy Future: The Unconventional Oil & Gas Revolution and the U.S. Economy



SHALE ENERGY IS FUELING ECONOMIC GROWTH

Shale energy already contributes **an enormous amount to annual GDP**, and it's projected to nearly **double by 2025**.

GDP in Billions

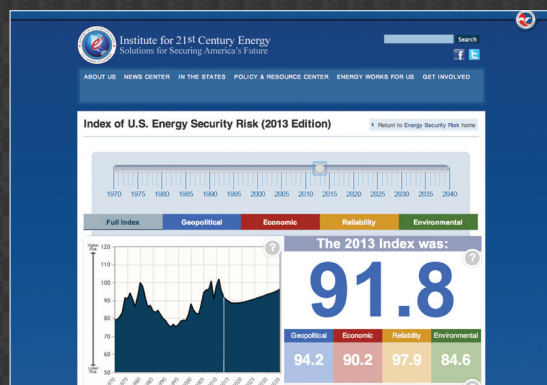
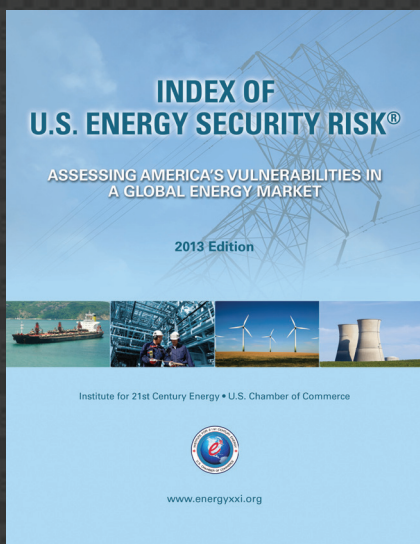
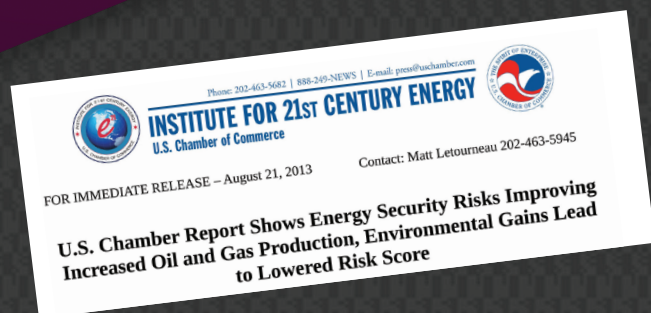


Source: IHS report America's New Energy Future: The Unconventional Oil & Gas Revolution and the U.S. Economy

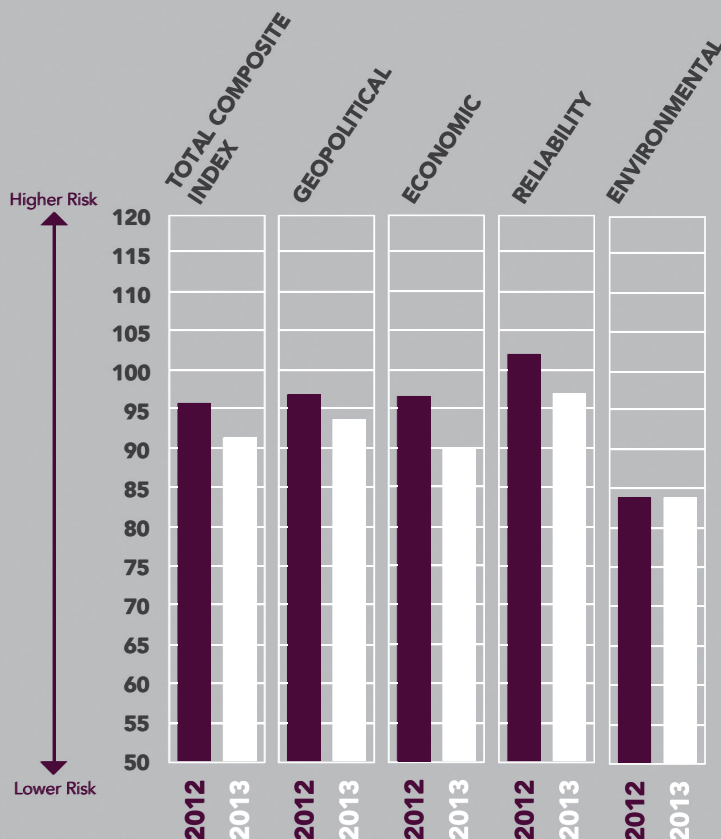
(N) FOCUS

The landmark Index of U.S. Energy Security Risk continues to drive discussion on energy security in America. For 2013, our analysis found that American energy security improved—driven largely by our abundance of unconventional oil and gas.

Overall, U.S. risk dropped from a high of 101.3 last year to 95.3 in our latest edition.



Index of U.S. Energy Security Risk Summary Table:



4

CHAPTER

Expanding Our Reach



MENTIONED IN...



Over 300 news articles



Appeared in 8 television interviews



Participated in 19 radio interviews



Issued 27 press releases and 174 blog posts



Ran 10 national and regional print ads

Delivering our message to a broad audience is a key part of the Energy Institute's mission. Our aggressive outreach included print, television and radio opportunities. In addition, we've continued to grow our digital audience and network of supporters.



Christopher Guith promotes the Energy Institute's platform during an interview in Colorado.



Karen Harbert talks energy security with Neil Cavuto on FOX Business.



Karen Harbert discusses the latest Keystone XL pipeline developments on KLIN's morning show in Lincoln, NE.

THE ADVOCATE

HOME

U.S. Chamber CEO cites 'energy revolution' in BR speech

The Examiner
SAN FRANCISCO
Tom Donohue: America's New Era of Energy Security

The Washington Post

SNL

Thursday, October 10, 2013 12:32 PM ET Extra

Roughly 170 business leaders urge Obama to approve Keystone XL

POLITICO

U.S. Chamber says energy security risks improved in 2012

The New York Times

FOX BUSINESS
THE POWER TO PROSPER™

Report: Energy Boom to Help Boost American Jobs, Salaries

National Journal

ENERGY

Business Groups Press Obama to Approve Pipeline



CBN NEWS Politics

Chamber Fights Unprecedented Red Tape under Obama

SPIRIT OF ENTER

The U.S. Chamber of Commerce said it's going to use every resource at its disposal to fight the growing number of federal regulations.

observer-reporter.com
Serving Southwestern Pennsylvania

February 3, 2014 3:43 pm

News Sports Opinion Multimedia Obituaries Lifestyle

Harbert calls for U.S. to become united on energy

Chicago Tribune

THE HILL
US Chamber urges support for new bill to thwart EPA climate rules

WYOMING BUSINESS REPORT

EPA coal outreach ignores key regions

Montana Energy
SUMMER 2013 Review

EXPORT POLICY NEEDS TO MATCH DOMESTIC ENERGY POTENTIAL

U.S. News & World Report

THE WALL STREET JOURNAL. BUSINESS

Households Gained \$1,200 Thanks to Surging U.S. Oil Production
Surging U.S. Oil Production

Bloomberg

Forbes

Los Angeles Times

LOCAL U.S. WORLD BUSINESS SPORTS ENTERTAINMENT HEALTH STYLE TRAVEL OPINION

MONEY & CO. TECHNOLOGY AUTOS HIGHWAY 1 COMPANY TOWN PERSONAL FINANCE JOBS

Judge throws out SEC's disclosure rule for energy companies



ROLL CALL

POLITICS POLICY **INFLUENCE** OPINION HILL LIFE BLOGS CLASSIFIED

Chamber Urges More Robust Energy, Trade and Regulatory Policies

FINCHANNEL.COM - GLOBAL NEWS CHANNEL

FINANCIAL

HOME GEO INSURANCE BANKS TRAVEL MARKETS JOBS BUSINESS WORLD SCHOOL TECH PR SEARCH CAREER CONTACT

U.S. Chamber Report Shows Energy Security Risks Improving

OIL & GAS JOURNAL

UNCONVENTIONAL OIL & GAS MAGAZINE PAST ISSUES

HOME GENERAL INTEREST EXPLORATION & DEVELOPMENT DRILLING & PRODUCTION

More energy development would significantly help US, Donohue says



Karen Harbert joins Ross Eisenberg of the National Association of Manufacturers, former Michigan Governor John Engler of the Business Roundtable, and former Senator Byron Dorgan of the Bipartisan Policy Center at a news conference to kick off the Alliance to Save Energy's EEGlobal event.

In 2013, we increased our investment in **DIGITAL ADVERTISING**. Utilizing the latest technology and marketing tactics, we're able to focus on advertising to key demographics and locations that move the needle the most. Our digital advertising campaigns were viewed by over **6.5 MILLION** and generated thousands of new supporters to help us make an impact.

The collage displays several digital advertising spots:

- US News Money:** A banner at the top of the Money section with the headline "TELL PRESIDENT OBAMA YOU SUPPORT KEYSTONE XL. CLICK HERE TO SIGN OUR PETITION TO SAY YES TO JOBS AND ENERGY SECURITY."
- New York Post:** A banner on the Page Six section with the same headline and call to action.
- Chicago Tribune Business:** A banner on the Business section with the headline "TELL PRESIDENT OBAMA YOU SUPPORT KEYSTONE XL. CLICK HERE TO SIGN OUR PETITION TO SAY YES TO JOBS AND ENERGY SECURITY."
- CBS Money Watch:** A banner on the Money Watch section with the headline "TELL PRESIDENT OBAMA YOU SUPPORT KEYSTONE XL. CLICK HERE TO SIGN OUR PETITION TO SAY YES TO JOBS AND ENERGY SECURITY."

Other visible content includes a "BEST JOBS" ranking, a "Vocus" advertisement, and a "How to estimate your Social Security benefits" article by Steve Vernon.



Our advertising strategy is multi-faceted. To help augment our digital campaigns, the Energy Institute ran **PRINT ADVERTISING** in outlets across the country, including the Wall Street Journal, Politico, Washington Post, and regional newspapers.

[illegible]

Where Do You Want To Get Your Oil From?

What Will President Obama Decide?

XL pipeline will provide 800,000 barrels of oil a day from Canada and American refineries. That's 800,000 barrels a day that we won't need to import from countries that don't always share our values. The Keystone XL pipeline could create jobs for Americans to work and generate millions in investments and revenues. So, tell President Obama to approve the Keystone XL pipeline today. Visit <http://www.energyxli.org/keystonexl>

U.S. CHAMBER OF COMMERCE

www.energyxli.org

SENATORS

ENACT **SHAHEEN-PORTMAN**

TODAY!

The Energy Savings & Industrial Competitiveness Act will...

SAVE

Businesses & Consumers Money

CREATE

American Jobs

INNOVATE

U.S. Industry

REDUCE

Federal Waste

WE STAND UNITED TO BUILD A **STRONGER, MORE ENERGY-EFFICIENT AMERICA.**

ALLIANCE
for the Auto Industry

Uniting lives. Changing minds.

American
Chamber of
Commerce

BIPARTISAN POLICY CENTER

U.S. Business
Roundtable

NAIMA

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IR Ingersoll Rand

U.S. DEPARTMENT OF ENERGY

Johnson
Controls

legrand

NEMA

nationalgrid

Pacific Gas and
Electric Company

Rinnai

U.S. HOUSE OF REPRESENTATIVES



 @ENERGY21



**EPA IS NOT LISTENING TO THE 10 STATES
MOST DEPENDENT ON COAL**

THE DECK IS STACKED

**THE 10 MOST COAL
DEPENDENT STATES:**



VS

**STATES THAT HAD EPA
LISTENING SESSIONS:**



**WHY DOESN'T EPA WANT TO HEAR FROM CONSUMERS
WHO ARE MOST DEPENDENT ON COAL?**

The Environmental Protection Agency held "listening sessions" to help guide new regulations on all of our nation's electricity generating facilities.

America gets 40 percent of our electricity from coal—some states get as much as 95 percent. Yet EPA did not visit any of the top ten states most reliant on coal for their electricity.

EPA has refused to listen, too.

Tell EPA to Add Listening Sessions.
Email carbonpollutioninput@epa.gov and make your voice heard.



SEE THE FACTS FOR YOURSELF

www.energyxxi.org



2013 LEADERSHIP AND STAFF



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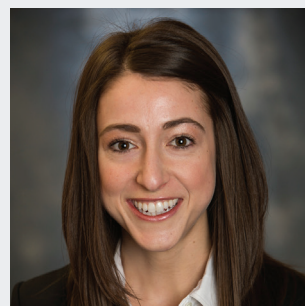
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