

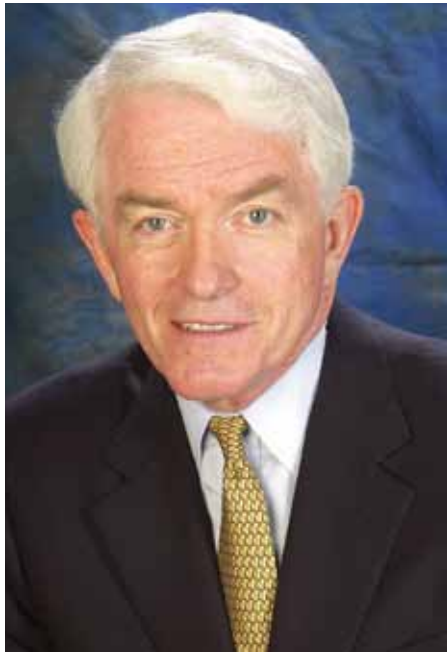
YEAR IN REVIEW 2011



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 is a pioneer in advancing common sense policies that will create jobs and enhance our energy security. Its platform is simple: responsibly unleash all of America's vast energy resources to create millions of jobs, improve our economy, and make the United States a global energy leader. With your continued support, the Institute will remain the nation's premier organization in devising and implementing smart strategies to make energy a powerful engine of growth, jobs, and security."

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 policymakers, 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.



100 Years Standing Up for American Enterprise

U.S. CHAMBER OF COMMERCE

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.

A MESSAGE FROM THE PRESIDENT AND CEO



I am pleased to present an overview of the Institute for 21st Century Energy's activities in 2011. As the Energy Institute has grown, so has our impact on the nation's energy debate. We've been able to continue to expand our reach across the nation and cement our place as an organization that is uniquely positioned to give voice to the thousands of businesses, small and large, that are impacted by the lack of progress being made in Washington on energy.

In 2011, the Energy Institute was engaged in major legislative, regulatory and judicial battles related to the limitation to drilling in the Gulf of Mexico and Alaska; the construction of the Keystone XL pipeline; the growing potential of shale oil and gas; and, the impact of EPA's proposed regulations on our electricity reliability, among others. Through the Chamber's legal arm, the National Chamber Litigation Center, the Institute ventured into the courtroom again eleven times to stand up for consumers. Of the 7 cases decided in 2011, the Institute's position prevailed in five of them.

The Energy Institute continues to bring facts and insightful analysis to polarized debates. We released the second annual Energy Security Risk Index, featuring a multitude of improvements since the inaugural Index in 2010. The Energy Security Risk Index remains the only tool available to quantify America's energy security. We also launched the Partnership to Fuel America, a new platform focused on emphasizing the growing opportunities for energy that exist between the U.S. and Canada.

With the U.S. Chamber's unparalleled network across the nation, the Energy Institute's reach can be felt in all 50 states. We travelled hundreds of thousands of miles to educate and mobilize over 20,000 members of the business community to join our cause. Our advocates generated over 90,000 letters to Congress and over 10,000 letters to President Obama in support of pro-energy positions on issues such as the Keystone XL pipeline and EPA regulations.

The business community, consumers and the media continue to turn to us for information and commentary. Our internet traffic rose nearly 60% over the last year with unique visitors from every state and 120 nations, and we significantly expanded our social media efforts. More than 200 media outlets reaching over 2 million people included us in their reporting in 2011.

This year, we'll be building on our success by ensuring that energy is at the forefront of the public debate during this critical election year. We will continue to expand the Partnership to Fuel America, and will be undertaking similar efforts to engage the business community on other critical issues. In particular, the Energy Institute will be educating business and opinion leaders about the enormous potential of shale oil and gas.

Thank you for your support of our activities, and we look forward to your continued involvement in our effort to advance a common sense energy policy in America.

Sincerely,

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

Karen Alderman Harbert

THE FOUNDATION

The Institute for 21st Century Energy was founded on the principle that energy is vital to our national and economic security. In 2008, the Energy Institute unveiled a policy platform of nearly 90 measurable energy and environmental recommendations for the new Administration and Congress. Over the past two years, dozens of these recommendations have been introduced in bills pending before the U.S. Congress or acted upon by the Administration. These key policy principles continue to inspire new activities and thought leadership and further validate the Energy Institute's mandate in Washington and around the country.

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PROMOTING
A PRO-GROWTH
ENERGY
PLATFORM





Energy Institute Policy Platform

- Aggressively Promote Energy Efficiency
- Immediately Expand Domestic Oil and Gas Exploration and Production
- Commit to and Expand Nuclear Energy Use
- Commit to the Use of Clean Coal
- Increase Renewable Sources of Electricity
- Transform our Transportation Sector
- Modernize and Protect U.S. Energy Infrastructure
- Address Critical Shortages of Qualified Energy Professionals
- Reduce Overly Burdensome Regulations and Opportunities for Frivolous Litigation
- Reduce the Environmental Impact of Energy Consumption and Production
- Invest in Climate Science to Guide Energy, Economic, and Environmental Policy
- Significantly Increase Research, Development, Demonstration, and Deployment of Advanced Clean Energy Technologies
- Demonstrate Global Leadership on Energy Security and Climate Change

The Energy Institute advocates for sound, common sense energy policies that will create jobs and make America more secure.

In 2011, we were engaged in major policy discussions including the construction of the proposed Keystone XL pipeline, the growing potential of shale oil and gas, the impact of EPA's proposed regulations on our electricity reliability, and many others.

The energy debate in Washington once again took place against a backdrop of a nation struggling with high levels of unemployment. To start 2011, we proposed a Five Point Plan of achievable items that could gain bipartisan support in the new Congress.

Despite the need for good jobs, energy projects were unable to gain traction with the Administration, which restricted access to future offshore exploration and sought to delay a decision on the Keystone XL permit.

For that reason, the Energy Institute continued to highlight the potential of energy as not just a component of our recovery, but the foundation upon which our economy could be built.

Together with policymakers and thought leaders, we demonstrated the ways in which our pro-growth energy platform will benefit our nation.

While the Energy Institute's basic platform remains central to our mission, we recognized that the election of a new Congress meant new priorities and opportunities for action on key energy policies.

As a result, we presented a five point plan of achievable items that Congress could accomplish. In recognition of the growing concern about the deficit, these items can be accomplished at minimal cost.

FIVE POINT PLAN

- ✓ Maximize America's own energy resources
- ✓ Make new and clean energy technologies more affordable
- ✓ Eliminate regulatory barriers derailing energy projects
- ✓ Do not put America's existing energy sources out of business
- ✓ Encourage free and fair trade of energy resources and technologies globally



Christopher Guith and Karen Harbert respond to reporters inquiries at the Five Point Plan roll-out on February 1.

The Energy Institute regularly convenes policy and thought leaders to discuss important energy topics.

For instance, in February, the Institute hosted a roundtable on shale gas regulation. Congressman Gene Green of Texas, Congressman Tim Murphy of Pennsylvania, and FERC Commissioner Mark Spitzer led the discussion. Also in attendance were many public utility commissioners and stakeholders who work on the ground on shale issues, including Robert Powelson, chairman of the Pennsylvania Public Utility Commission, and Katie Klaber, president and executive director of the Marcellus Shale Coalition.



Karen Harbert discusses shale gas policy with Robert Powelson, chairman of the Pennsylvania Public Utility Commission, and Katie Klaber, president and executive director of the Marcellus Shale Coalition.



Karen Harbert moderated the Institute's Roundtable Discussion on Shale Gas Policy and Regulation.

Energy Institute leaders are often called upon to give expert testimony at Congressional hearings.

In 2011, Energy Institute officials appeared before panels in the House of Representatives and the United States Senate.



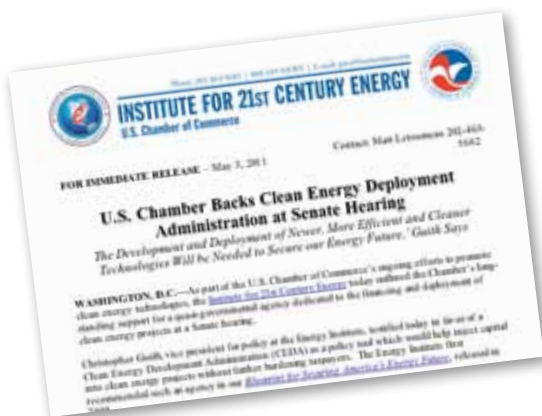
Christopher Guith testifies before the Senate Energy and Natural Resources Committee.



“ We have an abundance of resources, but from its earliest days, the Obama Administration has continually been taking land and coastal areas off the table for oil and gas production by canceling onshore leases, imposing a moratorium on exploration and production in the Gulf of Mexico, and proposing a leasing plan that prevents us from developing more resources for the next five years.”

~ Karen Harbert, 3/31/11

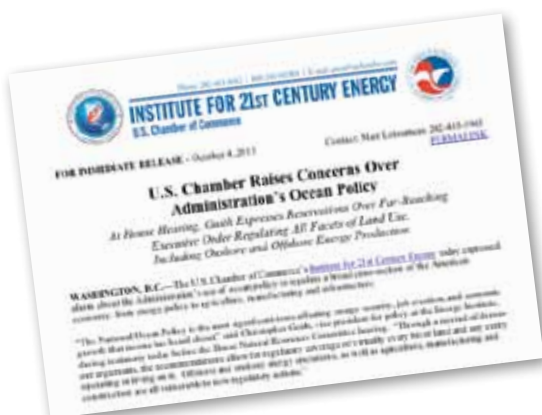
House Committee on Natural Resources – Hearing on Gasoline Prices



“ The label ‘clean energy’ is not reserved solely for renewables, but must be accurately applied to any and all new technologies and processes that reduce environmental impact, whether it be clean coal, advanced biofuels, natural gas vehicles, advanced nuclear or energy storage, among others.”

~ Christopher Guith, 5/3/11

Senate Energy and Natural Resources Committee – Hearing on Clean Energy Technologies



“ The National Ocean Policy is the most significant issue affecting energy security, job creation, and economic growth that no one has heard about. Offshore and onshore energy operations, as well as agriculture, manufacturing and construction are all vulnerable to new regulatory actions.”

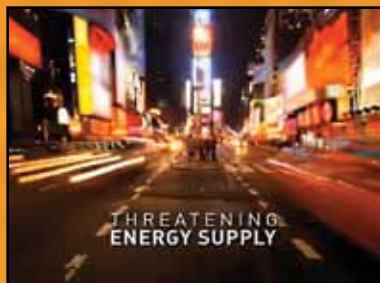
~ Christopher Guith, 10/4/11

House Natural Resources Committee – Hearing on Onshore and Offshore Land Use

in focus: Utility MACT

As the Obama Administration's EPA continued its march toward overregulation, the Energy Institute responded with a campaign against the proposed "Utility MACT" regulations.

The Energy Institute was the leader of a large group of business organizations that argued that industry needs more time to comply with strict standards. The EPA's rule threatens America's electricity reliability and could cost consumers millions, which is why the Energy Institute launched an aggressive advertising campaign and mobilized the Chamber's grassroots network to oppose it.



Television advertisements on national networks, December 2011.



Don't Let the EPA Turn Out the Lights on the American Economy

EPA is finalizing the most expensive rule in its history. Known as Utility MACT, it could threaten America's energy supply, cost jobs, and raise energy prices on businesses, manufacturers, and families if it is implemented too fast.

Twenty-five states, organized labor, manufacturers, and businesses from across the country are seeking additional time for power plants to comply with this expensive new rule.

Tell President Obama—America needs more time to get the job done right, not more lost jobs.



Print advertisement in national publications, December 2011.

The Energy Institute was proud to co-host two energy leaders as part of the ongoing National Chamber Foundation CEO Leadership Series.

In April, we heard from Thomas Fanning, president and CEO of Southern Company. In July, Shell Oil Company president Marvin Odum joined us. Both addressed large crowds in the Chamber's Hall of Flags.



“...the decisions we make around energy use will define whether we will face a period of extraordinary opportunity for policy-makers, businesses like ours and for society at large.”

- Tom Fanning
President and CEO of
Southern Company

“...there are two major elements that make up a sensible national energy policy. First, we need all the arrows in the quiver – a full portfolio of energy resources – nuclear, 21st Century coal, natural gas, renewables and energy efficiency.”

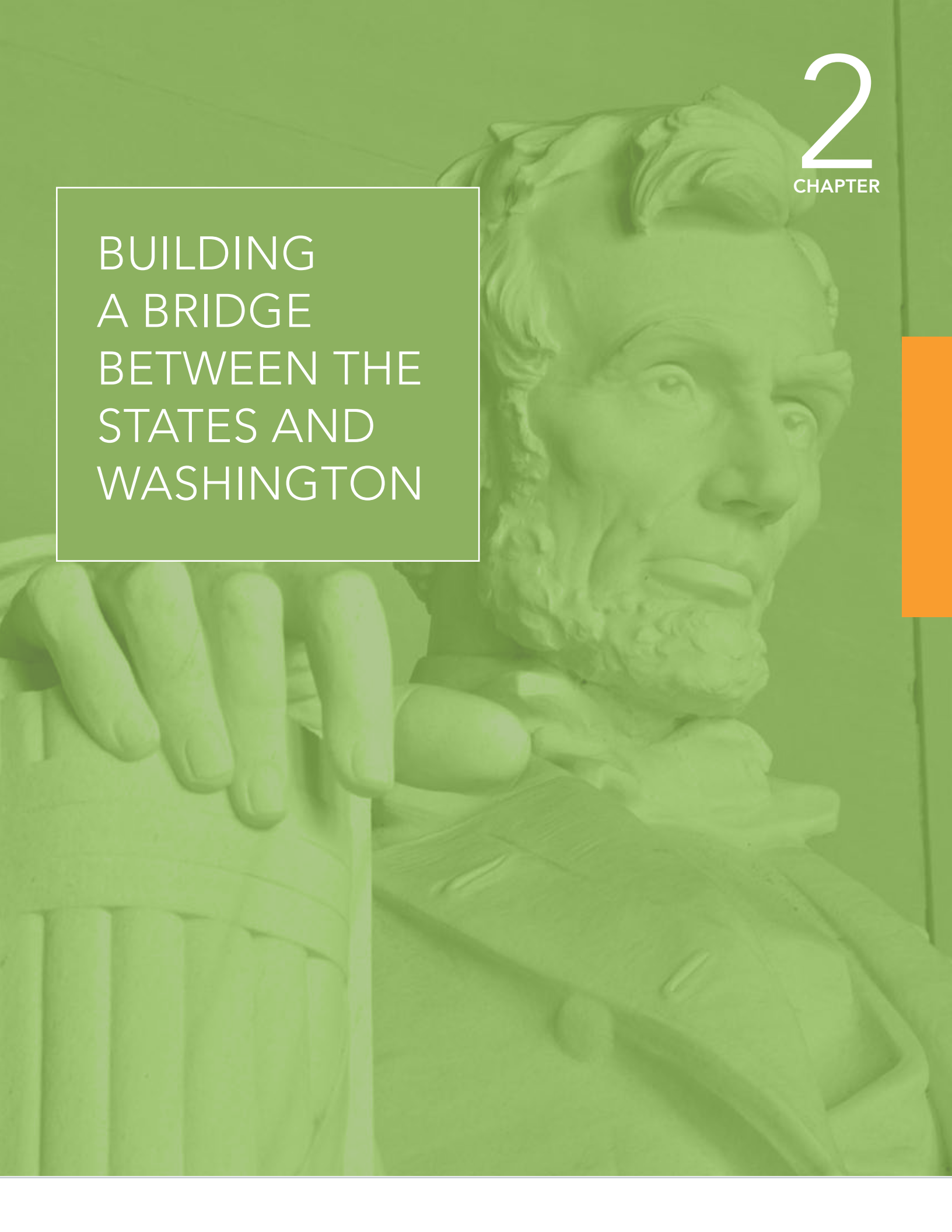
- Marvin Odum
President of Shell Oil Company



2

CHAPTER

BUILDING A BRIDGE BETWEEN THE STATES AND WASHINGTON



With the U.S. Chamber's unparalleled network across the nation, the Energy Institute's reach can be felt in all 50 states.



Mike Catanzaro, energy policy advisor to House Speaker John Boehner, previews 2012 energy legislation at the December Leadership Council meeting.



Dr. Arun Majumdar, Director, Advanced Research Projects Agency – Energy, speaks at an Energy Institute roundtable event.

In 2011, the Energy Institute logged hundreds of thousands of miles to educate and mobilize the business community to join its cause.

Due to gridlock in Washington, some of the best opportunities for progress exist outside the Beltway. As a testament to the Institute's growing network in the states, Alaska Governor Sean Parnell chose the Chamber and the Energy Institute as the host of a major announcement from his state designed to boost energy production. And CEO Karen Harbert collaborated with some of the nation's top governors to tackle our country's growing energy challenges.



Karen Harbert delivers remarks at the Chamber's Regional Government Affairs meeting in Chicago.



Karen Harbert, Shariq Yosufzai of Chevron Corporation and Ralph Cavanagh of National Resources Defense Council discuss energy security in San Francisco.



Karen Harbert addresses the American Association of Petroleum Geologists in Houston.



Karen Harbert discusses U.S. offshore oil exploration at an event hosted by Rice University.

Building a bridge between the States and Washington





in focus:

Partnership to Fuel America

The Partnership to Fuel America (PFA) was launched in 2011 to emphasize the growing opportunities for energy that exist between the U.S. and Canada.

While the Partnership will be focused on long term opportunities, the initial focus was on the construction of the proposed Keystone XL pipeline. The Partnership has quickly grown to include members in 12 states, mostly from the Midwest, where the greatest impact from Canadian energy development will be felt. In particular, PFA recruited and built local supporters in the states closest to the Keystone XL pipeline, and played a role in a significant turnout from the business community at the State Department's public hearings on Keystone held along the pipeline route. Our partners include local and medium-sized businesses and business organizations. Many of the individuals that have attended Partnership events are leaders in their communities and are helping to educate other business leaders and citizens.



**IT'S TIME TO PUT
ENERGY
INTO CREATING AMERICAN JOBS**

The Keystone XL Pipeline project is good for America—and Nebraska. This shovel ready project will create 20,000 well-paying jobs in the short term, and thousands more in the long term. It will also generate \$465 million in new investment here in the Cornhusker state.

The Keystone XL Pipeline will provide our nation with a safe, secure supply of reliable and affordable energy from our trusted ally Canada. Nebraskans now have an opportunity to help America reduce our dependence on oil from unfriendly regimes. It's time to put more energy into creating jobs and investing in a secure energy future.

JOBS. SECURITY. NOW.

For more information about the Partnership to Fuel America, please visit www.FuelingUS.org

PARTNERSHIP TO FUEL AMERICA

Partnership to Fuel America advertisement, December 2011.

The Partnership to Fuel America has quickly grown to include members in 12 states.



PFA member John Meyer of Winner, SD, testifies about the benefits of Keystone XL pipeline at a Senate Health, Education, Labor and Pensions committee hearing on December 8.



John McCollister of the Platte Institute testifies on behalf of PFA at the State Department's Keystone XL hearing in Atkinson, NE.



Larry Tveit, former Montana state senator, gives a preview of his testimony in support of the Keystone XL pipeline at a State Department hearing in Montana.



3

CHAPTER

DEMONSTRATING NATIONAL AND INTERNATIONAL THOUGHT LEADERSHIP



A major component of the Energy Institute's mission is to educate the public and the business community about energy issues facing the nation.

In 2011 the Energy Institute continued its tradition of providing timely and insightful analysis, through print reports, expert testimony provided to Congress, and in support of litigation when necessary.

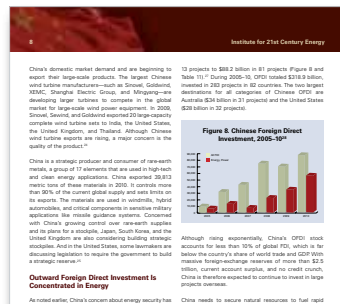
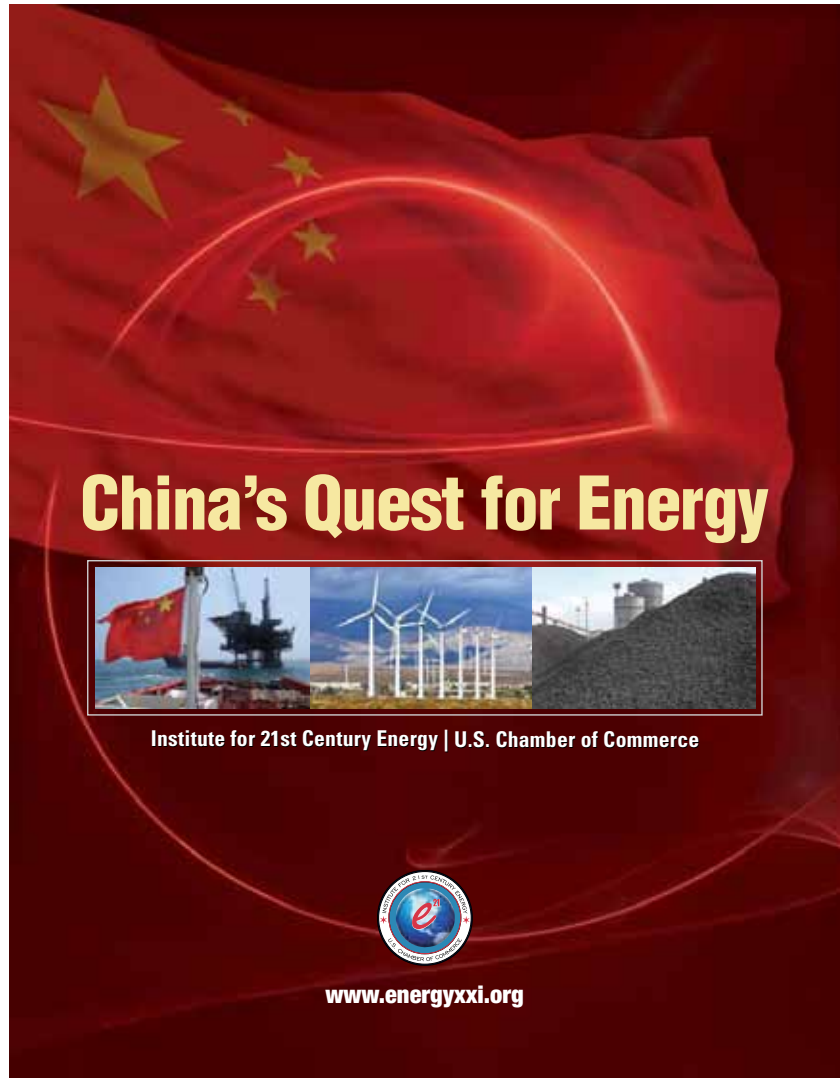
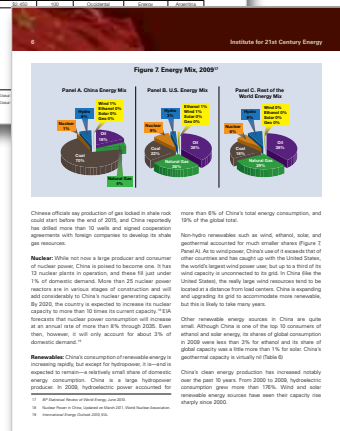


Table 12. Top 10 Destinations for Chinese OFDI in Energy and Power, 2005-10*

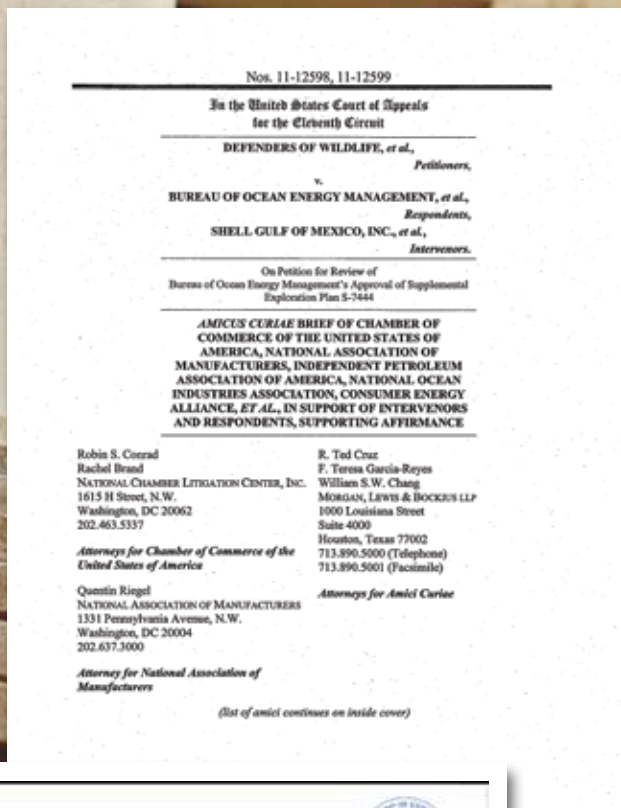
Country	Number of Deals	Amount of Investment (\$Billion)	Percentage of Total
United States	10	\$11.1	21.2%
Canada	8	\$7.1	13.5%
United Kingdom	7	\$6.0	11.4%
France	6	\$5.0	9.4%
Germany	5	\$4.0	7.5%
Italy	4	\$3.0	5.6%
Spain	3	\$2.0	3.7%
Sweden	2	\$1.0	1.9%
Denmark	1	\$0.5	0.9%
Total	50	\$52.7	100%

Table 13. Top 10 Chinese Foreign Investment Projects, 2009*

Country	Project Name	Investment (\$Billion)	Capacity (MW)
United States	China Energy	\$1.0	1,000
Canada	China Energy	\$0.5	500
United Kingdom	China Energy	\$0.5	500
France	China Energy	\$0.5	500
Germany	China Energy	\$0.5	500
Italy	China Energy	\$0.5	500
Spain	China Energy	\$0.5	500
Sweden	China Energy	\$0.5	500
Denmark	China Energy	\$0.5	500
Total	10	\$5.0	5,000



With an increasing amount of attention on China, the Energy Institute released a report examining its energy consumption patterns. Some have asserted that China has an advantage over the United States in clean energy development, but the Energy Institute's analysis showed that alternative energy sources account for a negligible share of China's energy consumption. In fact, China has become an important market for American coal, which has been squeezed by U.S. regulations.



Nos. 11-12598, 11-12599

In the United States Court of Appeals
for the Eleventh Circuit

DEFENDERS OF WILDLIFE, et al.,
Petitioners,

vs.
BUREAU OF OCEAN ENERGY MANAGEMENT, et al.,
Respondents,

SHELL GULF OF MEXICO, INC., et al.,
Intervenors.

On Petition for Review of
Bureau of Ocean Energy Management's Approval of Supplemental
Exploration Plan S-7444

AMICUS CURIAE BRIEF OF CHAMBER OF
COMMERCE OF THE UNITED STATES OF
AMERICA, NATIONAL ASSOCIATION OF
MANUFACTURERS, INDEPENDENT PETROLEUM
ASSOCIATION OF AMERICA, NATIONAL OCEAN
INDUSTRIES ASSOCIATION, CONSUMER ENERGY
ALLIANCE, ET AL., IN SUPPORT OF INTERVENORS
AND RESPONDENTS, SUPPORTING AFFIRMANCE

Robin S. Conrad
Rachel Brand
NATIONAL CHAMBER LITIGATION CENTER, INC.
1615 H Street, N.W.
Washington, DC 20062
202.463.5337

*Attorneys for Chamber of Commerce of the
United States of America*

Quentin Ringel
NATIONAL ASSOCIATION OF MANUFACTURERS
1331 Pennsylvania Avenue, N.W.
Washington, DC 20004
202.637.3000

*Attorney for National Association of
Manufacturers*

R. Ted Cruz
F. Teresa Garcia-Reyes
William S.W. Chang
MORGAN, LEWIS & BOCKLE LLP
1000 Louisiana Street
Suite 4000
Houston, Texas 77002
713.890.5000 (Telephone)
713.890.5001 (Facsimile)

Attorneys for Amici Curiae

(List of amici continues on inside cover)

U.S. CHAMBER OF COMMERCE NEWS

Phone: 202-463-5682 | 888-249-NEWS | E-mail: press@uschamber.com



FOR IMMEDIATE RELEASE — August 2, 2011

Contact: Bryan Goettel 202-463-5682

[PERMALINK](#)

U.S. Chamber Applauds Court's Dismissal of Oil Sands Fuels Lawsuit

*Sierra Club's Lawsuit Against Defense Department Threatens
American Jobs, Growth, and National Security*

WASHINGTON, D.C.— The U.S. Chamber of Commerce applauds today's [decision](#) by a federal district court to dismiss a lawsuit brought by environmentalists intended to prevent the U.S. Department of Defense from purchasing fuels derived from Canadian oil sands.

"The court got it right. This case simply does not belong in our courts," said Robin Conrad, executive vice president of the National Chamber Litigation Center, the Chamber's public policy law firm. "This lawsuit was yet another effort to regulate greenhouse gas emissions through litigation rather than legislation. This litigation could harm a wide range of American employers, from the domestic refiners who process the oil sands crude to the mechanics who work on the equipment."

In September 2010, the Chamber, along with the American Petroleum Institute and the National Petrochemical and Refiners Association, intervened in the lawsuit in support of the Defense Department. Today, the Eastern District of Virginia dismissed the case because the environmentalist plaintiffs did not have standing to bring the lawsuit. The case is [Sierra Club, et al. v. U.S. Defense Energy Support Center, et al.](#)

"Today's ruling was a victory for the many U.S. industries that produce, process, transport or rely on oil derived from Canadian oil sands—making it ultimately a victory for the consumer," said Karen Harbert, president and CEO of the U.S. Chamber's Energy Institute. "At this time of high energy prices and economic hardships, the last thing we should do is restrict the use of a stable, reliable fuel source which would harm our energy security and cost us jobs."

The Eastern District of Virginia agreed with the U.S. Chamber and the Defense Department that the plaintiffs lacked standing to bring the lawsuit. According to the court, the plaintiffs' alleged injuries from the Defense Department's fuels contracts were too remote, and that regardless, barring the military from purchasing fuels derived from oil sands would not reduce the climate change-related risks that the plaintiffs alleged. The plaintiffs had argued that the Defense Department violated Section 526 of the Energy Independence and Security Act of 2007 by purchasing fuels produced from crude derived from Canadian oil sands, which the plaintiffs alleged emit higher levels of greenhouse

While the Energy Institute's preference would be for sound policies that are determined in the legislative process, at times it is necessary to stand up for consumers and American energy resources in the courts.

In 2011, through the Chamber's legal arm, the National Chamber Litigation Center, the Institute entered into 11 new cases, and has a total of 21 pending. Of the seven cases decided in 2011, the Energy Institute's position prevailed in five of them.

in focus:

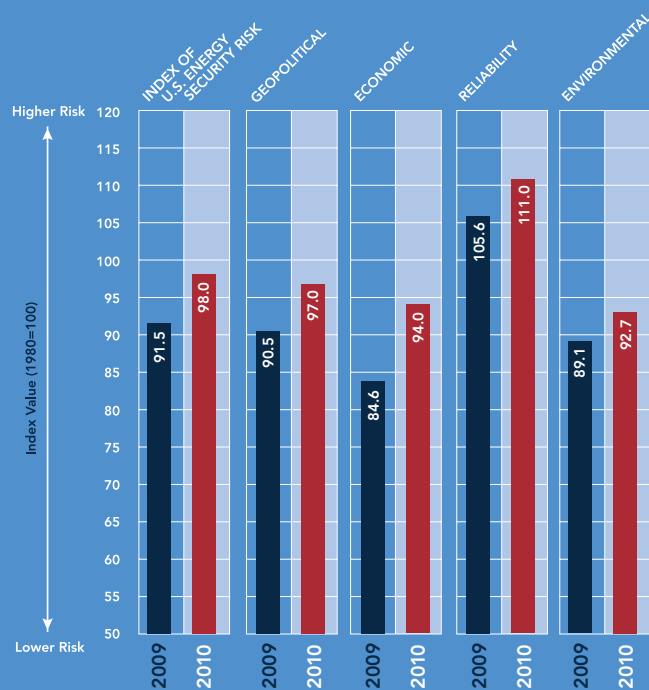
Index of U.S. Energy Security Risk

The 2011 edition of the Index of U.S. Energy Security Risk featured a multitude of improvements based on feedback received after the launch of the inaugural Index in 2010.

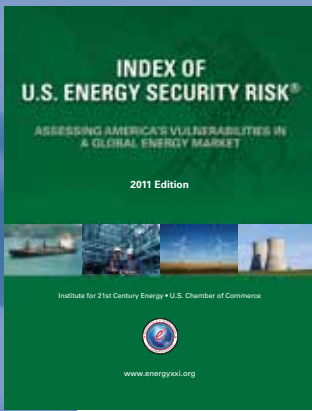
The Index of U.S. Energy Security Risk remains the only tool available to quantify America's energy security, based on 37 separate metrics covering four primary areas – geopolitical, economic, reliability and environmental. **For 2010, the most recent year in the Index, the energy security risk index score was 98.0, the fourth highest score since 1970 (higher scores mean more risk).**

Of the 37 metrics, 20 showed increased risk in 2010, 11 showed improvement, and six were unchanged. Eight of the top 10 metrics showing the largest changes in score were related to energy prices, price volatility and expenditures.

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



The Index of U.S. Energy Security Risk demonstrates that in 2011, America faced a greater risk – largely due to high energy prices and price volatility.



The Energy Institute released the 2011 index of U.S. Energy Security Risk on August 4, with a discussion that included Dr. Daniel Yergin.

The Energy Institute presented the Index to a host of organizations including Bipartisan Policy Center, U.S. Association of Energy Economists, World Green Energy Symposium, and the State Department's Visitor Exchange Program.



Above, Steve Eule discusses the Index of U.S. Energy Security Risk during a panel discussion hosted by the U.S. Association of Energy Economists.

Left, Karen Harbert delivers remarks at the launch event for the Institute's Index of U.S. Energy Security Risk.



A key component of the Index is an online tool which allows users to see for themselves the components of the risk index score. The online tool is helpful in understanding trends and the impacts that policy decisions have had on our energy security.



Steve Eule addresses a meeting hosted by the Major Economies Business Forum during the COP17 meetings in Durban, South Africa.

The Major Economies Business Forum on Energy Security and Climate Change was created to give the international business community a voice in the U.N. climate change negotiations.

First convened by the Energy Institute in 2009, the group of nearly 20 international business organizations was actively engaged at the 2011 Climate Change conference in Durban, South Africa.



The 17th Conference of the Parties (COP17) to the United Nations Framework Convention on Climate Change (UNFCCC) meeting took place in Durban, South Africa.



4

CHAPTER

EXPANDING OUR REACH



In 2011, the Energy Institute utilized traditional and new forms of media to share our message.



CNBC ran a feature on the Energy Institute's Five Point Plan launch in February.



Karen Harbert was interviewed live on CNBC's Squawk on the Street in May.



Matt Koch was interviewed by Fox News in November.



Yoshiki Hidaka, executive producer of The Washington Report, which airs nationally on Japanese television, interviews Christopher Guith about nuclear energy.

The Energy Institute continues to maintain a strong media presence, with officials regularly quoted in national, regional and local media.

Energy Institute leaders appeared in the media over 200 times, including outlets such as CBS, Fox News, The Wall Street Journal, POLITICO and numerous others.



One of the missions of the Energy Institute is to educate and then activate the public on behalf of common sense energy policies.

In 2011, the Institute reached over 85,000 activists by email, who in turn contacted Members of Congress and the White House tens of thousands of times to share their views on specific energy issues. The Energy Institute is fully integrated into the U.S. Chamber's renowned grassroots network, allowing it to help shape the debate in Washington and across the country.



The Energy Institute continued to utilize Facebook and Twitter to communicate to our network of supporters.



in focus: Websites

On the digital side, the Institute launched its custom designed new website and a stand-alone site to feature the Partnership to Fuel America.

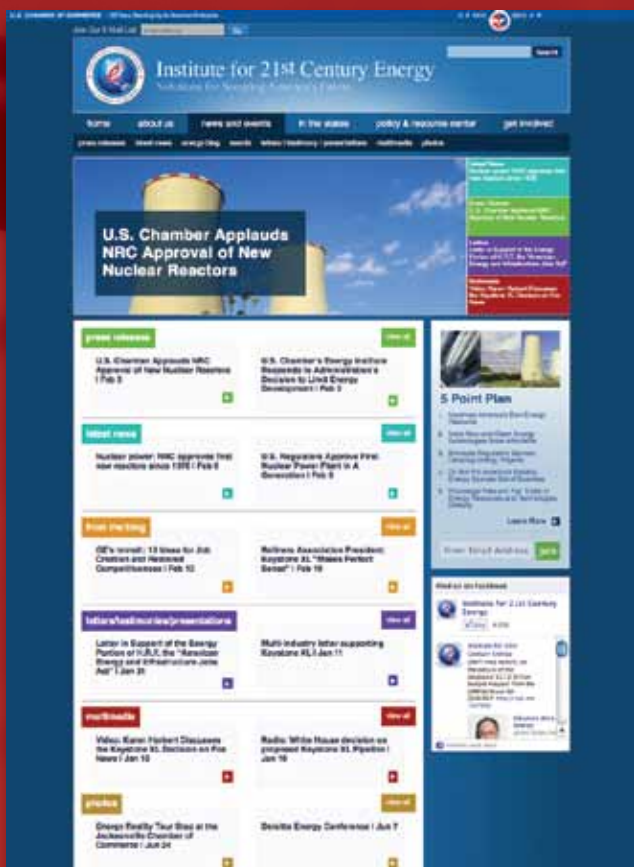
The Energy Institute's new website is more user-friendly and allows for the business community, government and the public to better access information about energy issues.

The website is regularly updated with timely information, news from the Energy Institute, and facts about energy in all 50 states.

The Partnership to Fuel America's website is an important tool to educate the public about the potential of Canadian energy resources. The website features an interactive map of the Keystone XL pipeline route, with state-specific job impact numbers along the way.



EnergyXXI.org



EnergyXXI.org



Fuelingus.org



2011 Leadership and Staff



Karen Alderman
Harbert
President and CEO



Stephen Eule
Vice President and
Managing Director,
Climate and Technology



Christopher Guith
Vice President and
Managing Director, Policy



Matthew Koch
Vice President
and Managing Director



Heath Knakmuhs
Senior Director, Policy



Susan Forrester
Director, Advocacy
and Outreach



Leila Getto
Director, Programs



Matt Letourneau
Director, Communications
and Media



Alyssa Cherif
Manager of Communications,
Strategy and Operations



IN MEMORY OF Fred Smith

Frederick C. Smith was the Energy Institute's first vice president and a valued colleague and friend. Fred joined the Energy Institute at its beginning, in 2007, and helped guide us as we've grown. Prior to joining the Chamber, Fred held a variety of distinguished positions at the Pentagon and in business. In November 2011, Fred lost his battle with cancer that he had so valiantly fought for several years. He will be sorely missed.



Institute for 21st Century Energy
U.S. Chamber of Commerce
1615 H Street, NW
Washington, DC 20062
Phone: 202-463-5558 | Fax: 202-887-3457
energyinstitute@uschamber.com
www.energyxxi.org



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