



*Guiding the transformation
of the global energy economy*

Natural Gas Opportunities and Challenges

**JISEA Annual Meeting
Golden, Colorado
March 13, 2014**

**Mark K. Boling
President**



Development Solutions

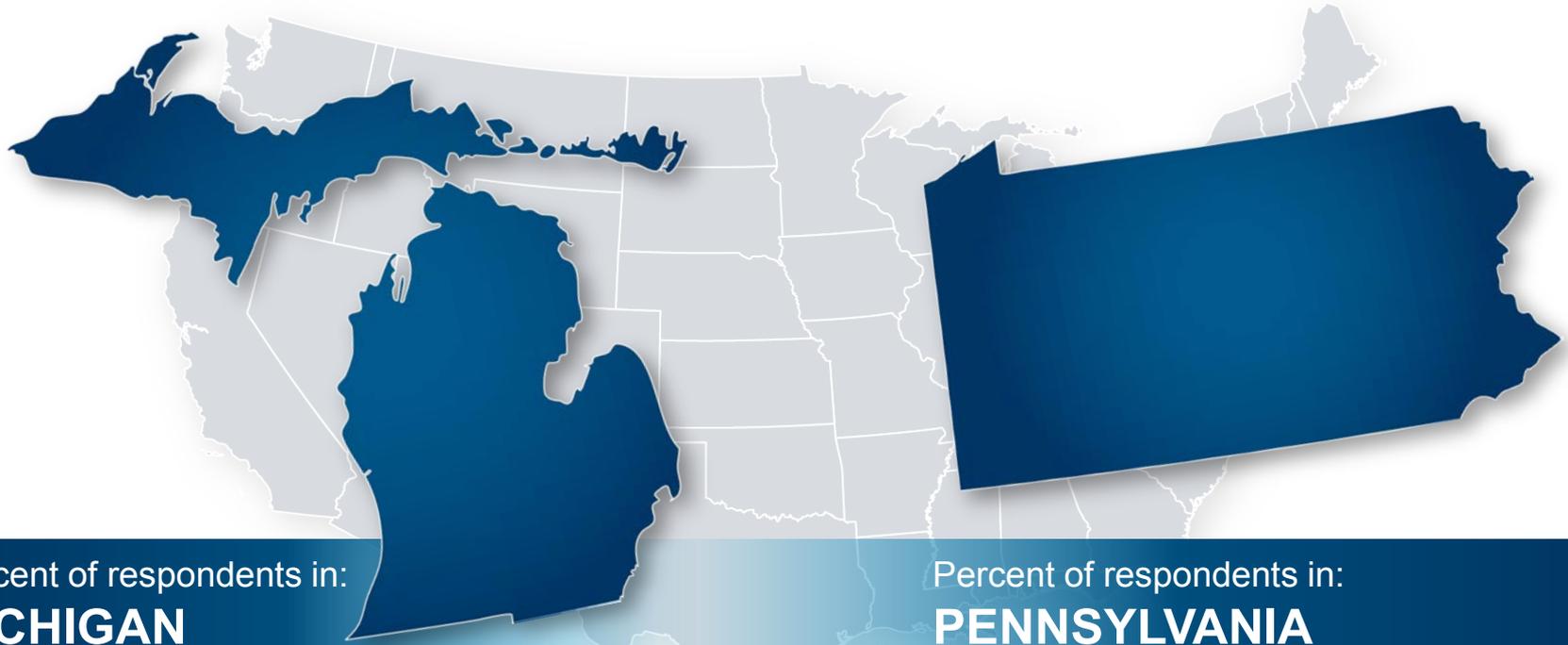
Balancing Environment, Community & Economy
a division of Southwestern Energy



MID-TERM REPORT CARD

SUBJECT	GRADE
Geosciences	A
Energy Economics	C+
Supply Chain Management	B-
Social Studies	D

Public Opinion of Hydraulic Fracturing



Percent of respondents in:
MICHIGAN

- 82%** Believe HF is important to the state's **financial well being**
- 52%** Believe HF's **economic benefits** outweigh environmental risks
- 52%** Favor a temporary **ban on HF**

Percent of respondents in:
PENNSYLVANIA

- 86%** Believe HF is important to the state's **financial well being**
- 54%** Believe HF's **economic benefits** outweigh environmental risks
- 58%** Favor a temporary **ban on HF**

What Does This Mean?



The “economic benefits” argument, while persuasive, is not enough to assure public acceptance of hydraulic fracturing operations.

Industry must do more to ensure public trust and acceptance of hydraulic fracturing operations.





Spend LESS time minimizing the public's concerns about hydraulic fracturing...

and MORE time communicating the real risks and what industry is doing to mitigate those risks.





Recognize that enactment of “smart regulations” can benefit all stakeholders, including industry.





COLLABORATION AND RISK COMMUNICATION





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