



The Tragedy of Elections

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Tags: [biofuel](#), [coal](#), [natural gas](#), [petroleum](#), [politics](#) [[list all tags](#)]

I was, just recently, at one of our annual Conferences. There were about 450 delegates, from 17 countries, with an associated exhibition with, I suppose, around 50 displays. After the meeting was over I wandered down town and took in a show that featured 12 Irish tenors (who came from places such as Australia, London, and the U.S. as well as the auld sod itself). Following the show I dined, in this inland, rather dry location, on seafood that, though delicious, had obviously traveled some considerable distance. I mention this because, for many academic types, this is a fairly common annual activity. It is how we network most frequently (and not just academics, since we were very much in the minority at this particular gathering). These types of event provide considerable income to the locations where they are a common happening. It is, like tourism, an activity that requires considerable travel, and considerable fuel (and not just the sort that comes in small glasses at the social events). Travel has become an assumed right, and there is no thought, at gatherings such as this, that their day in the sun may very soon wane. I helped put a meeting together in 2003 and with the concerns and expense of travel at that time, the attendance was down significantly from earlier meetings, and took another year to bounce back, and it is only in the last two years that we have been seeing the sorts of numbers that we had pre-2001.

It set me to thinking of the Denver Peak Oil meeting, when one evening as Stuart, Dave Cohen and I headed out for dinner, Stuart commented that I was much the most pessimistic of the three. And now I am trying to decide whether that is still true (if it was). I think, in the short-term it probably isn't, but in the longer-term it may well be. So let me explain my reasons and, in the process, perhaps disagree a little with some of my colleagues.

In the short term (say ten years) I think that Stuart's view is gloomier than mine. He has done superb work on demonstrating how close to being done are the oil reserves at Ghawar, but I am not totally convinced that there is not still enough in the Northern part of the field that there will remain significant production over this time interval. I continue to think that the current Saudi drop is politically, and economically driven, rather than geologically. But, as I note, this is only for the short-term. In ten years life will get a bit grimmer.

Within this next ten years I do feel that we will see a greater contribution from bio-generated ethanol. Among the meetings I have been to there is talk of corn varieties that will produce up to 4 times the quantity of fuel per acre that is now common. And it may be, though I suspect here that I am just as cynical as Robert and some DoA economists, that cellulosic ethanol may prove, as production moves to a larger scale, to be able to make some of the breakthroughs that will be necessary before it can be viable. But there is one thing that concerns me a little about this debate

(and I include [fireangel's post](#) in this), and that is that we are perhaps not truly appreciative, perhaps because now we talk about it, of the need for all the solutions we can get, and that we need more investment in any and all potential ideas that have a chance of working. I therefore am somewhat optimistic that we may see more from the biofuels side of the house than others may, provided, that is, that the investments are made to expand the fields of investigation.

And this is where my vision turns darker. Let me pinch a figure from the [EIA](#). It shows U.S. energy sources for 2004, but they haven't changed that much since.

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The three big slices of the pie Petroleum, Natural Gas and Coal are depleting fossil fuels. I need to explain my concern about coal in a longer post, but readers of the many detailed articles by the well-informed community that writes on this site cannot be in any doubt that the other two large slices cannot be sustained much longer. And as we erase chunks from those three large wedges, the hope for the thin slices to fill the gap is becoming less realistic. And this is my concern.

Just as the folk that attended the Conference (unrelated to energy) had very little thought about the rapidly approaching supply problem that we are heading into, so there is no immediate concern for most politicians and the movers and shakers of the world. We are now approaching the 2008 election, and those who must make the large investments needed to generate fuel at the levels that will be needed are starting to be shy of making those investments. Why? Because the rules may change with the regulators in a new Administration. Thus why begin to invest in the paperwork to start a new refinery/power plant/reactor if you can't be certain that new rules, set in a couple of years, may negate the value of that investment? And so we enter into a period of uncertainty, of caution and, with it delay.

Unfortunately the problem itself is not concurrently delayed. And so, with the time span that it will take to bring forth new ideas still remaining at around 20 years (and bear in mind that it is somewhat difficult to legislate new technology) and with lots of words but no action (wasn't there a Texas saying about that once?) we are probably now some years away from any significant government action in the U.S. We really cannot tell which direction the new Administration will favor at this time, and once in power it will take some time for the new levels of senior Administration of the different departments to be put in place, and then to begin to move plans of action forward. It is an opportunity that is now lost, and a time that cannot be regained. And it makes me more worried, and gloomier, and I begin to accept that Stuart was right about my pessimism. (And I haven't mentioned Hurricanes once).



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