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Energy Capital Conference

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Oil, Gas and U.S. Elections

Current State of Play

Getting to 270

Trend in the States

Legislation, Regulation and Litigation

Outlook (My Wild Guess)



Current State of Play

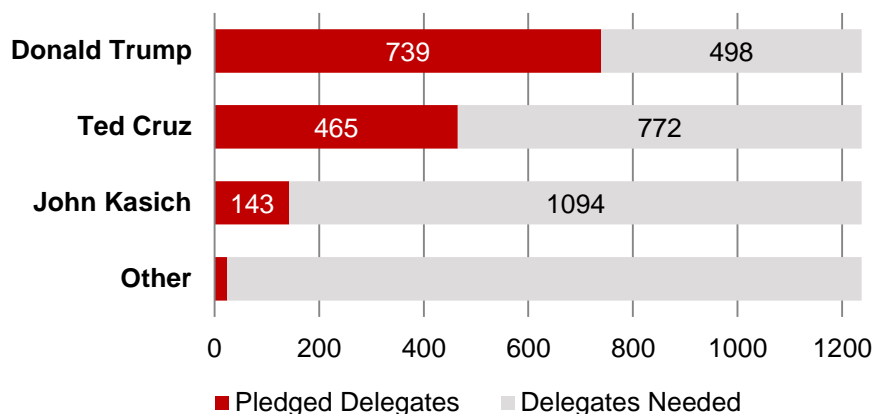
Current State of Play – Primary Season

The Race to 1,237 or 2,383 – Delegate Counts

Republican National Convention
July 18-21 in Cleveland

Democratic National Convention
July 25-28 in Philadelphia

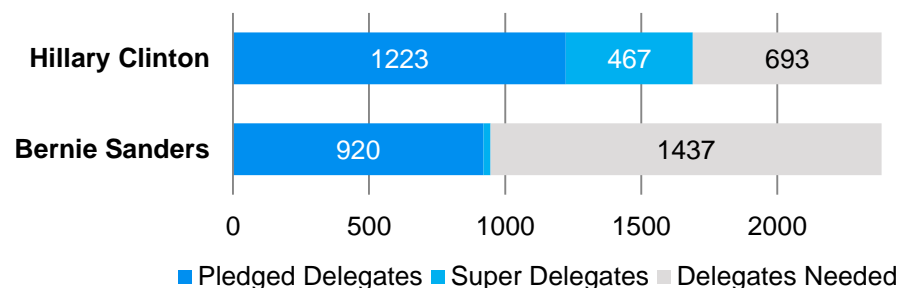
GOP Delegate Count



Delegates needed for nomination – 1,237

Delegates remaining - 944

Democratic Delegate Count



Delegates needed for nomination – 2,383

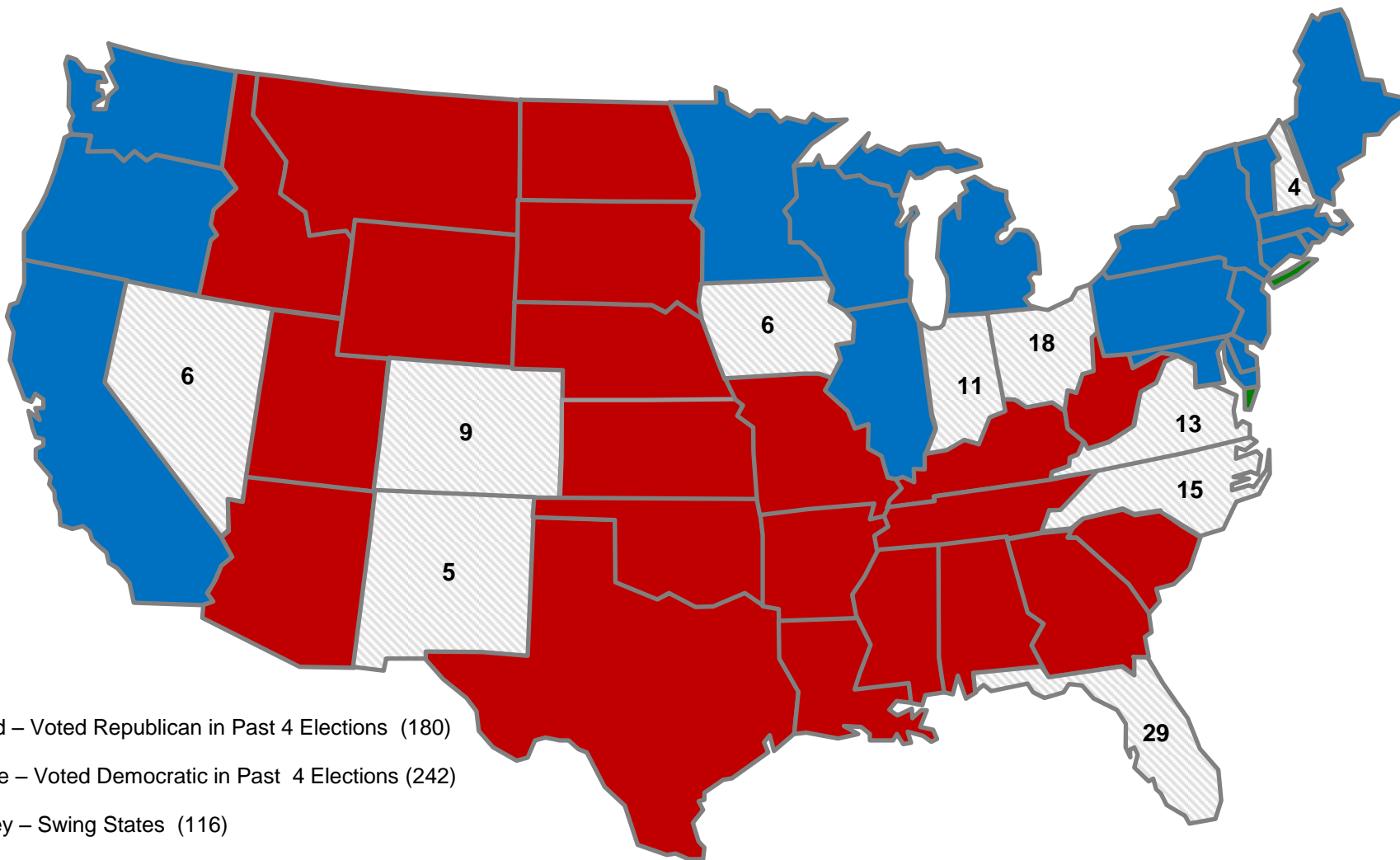
Delegates remaining – 2,129



Getting to 270

Getting to 270 – Electoral Vote Outcomes 2000 to 2012

GOP Challenge to Win 270 Electoral College Votes



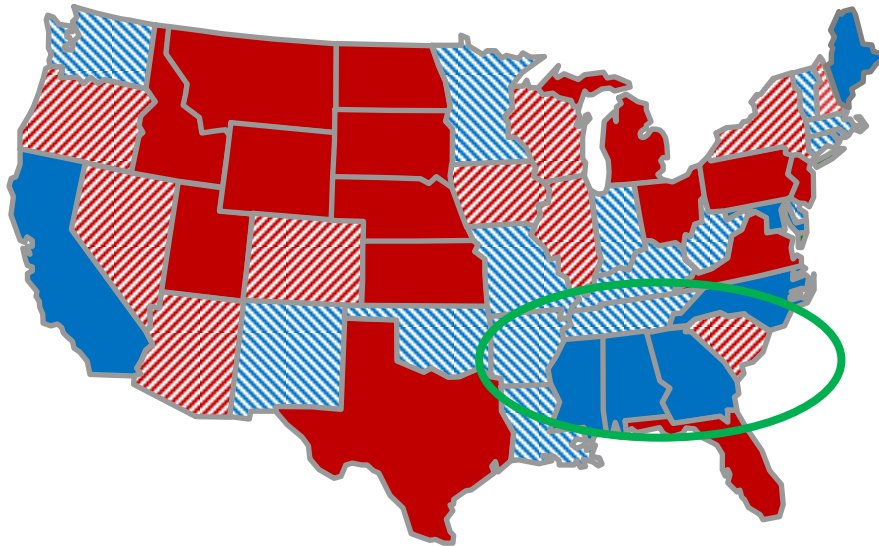


Trend in the States

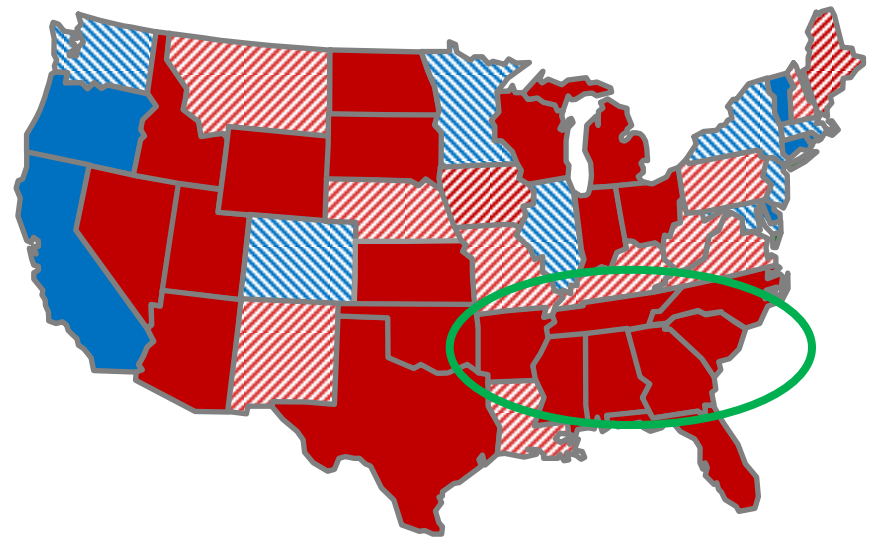
Trend in States – Political Picture 2000 vs. 2016

Residual Southern Democrats Changing to Republican Party Supporters

2000



2016



Red – Governor & Legislature GOP

Blue – Governor & Legislature Democrat

Red Stripe – Mixed Control Favoring GOP

Blue Stripe – Mixed Control Favoring Democrats



Legislation, Regulation and Litigation

Legislation, Regulation and Litigation (and Election)

What major issues impact the oil and gas sectors?

114th Congress

- Supreme Court Nomination
- Trade Agreements
- Iran Sanctions
- FY 2017 Budget

Obama Regulations

- Clean Power Plan – not “all of the above”
- Methane emissions
- Federal lands & offshore drilling restrictions
- BOEE blowout preventer

Litigation

- Ozone NAAQS
- BLM hydraulic fracturing
- Clean Power Plan
- Cross State Air Pollution
- RFS Standard

November 8, 2016

- House GOP majority at risk?
- Senate majority flip?
- White House – another President Clinton?
- State GOP gains?



Outlook (My Wild Guess)

Outlook (My Wild Guess) - National Elections

Changing Landscape or More of the Same?



Divisive campaigns keep voters anger high

- “New” President Clinton in White House
- Trump campaign hurts down-ballot GOP



Congressional election outcomes

- Democrats retake majority in Senate
- GOP holds House majority (but loses seats)



Split-government and gridlock (more of the same)

- Budget battles remain
- Supreme Court nomination(s)
- Executive order/regulation as main strategy



Q & A

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We can help you develop a deeper understanding of the developments that are shaping the future of oil & gas. Our support includes customized consulting that is focused on a client's specific strategic objectives, competitive challenges and asset base. Additionally, we offer support through subscription services and comprehensive market studies.

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