

## 2021 In Energy - The Year We Seem To Travel On Separate Planets

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If 2020 was the year of the great energy disconnect, 2021 was the year the people carrying out the energy debate appeared to be living on different planets, floating aimlessly through time and space and never intersecting with each other, or even attempting to do so. Should this continue through 2022, the entire world will be the worse for it.

2021 was a year in which climate change became tangible. Regardless of whether humans had involvement in it, or even were its cause, it became increasingly hard to stick to the mantra that weather patterns remain relatively static when the Pacific Northwest reached temperatures exceeding 115 degrees and large tornado outbreaks hit in places like New Jersey and Pennsylvania, as well as in December in Kentucky. It seems clear now that weather patterns are indeed changing.

Many scientists and environmental advocates have a simple explanation for that, as well as a simple solution. They assert that the weather changes are being caused by global warming resulting from the "greenhouse effect" caused, primarily, by the use of fossil fuels. Get rid of fossil fuels, some assert, and you can hope to limit further climate change (although it may already be too late to undo the damage that has already been done).

Hard core advocates like New York Congresswoman Alexandria Ocasio-Cortez have claimed that if we don't end fossil fuel usage within twelve years (now maybe ten?), human life as we know it may even cease to exist.

Swedish teenager Greta Thunberg, who has become the face of the anti-fossil fuel movement, dismisses any potential international climate agreement as more "blah, blah blah."

And what will replace fossil fuels? Why renewable energy from sources like solar, wind, and hydroelectricity, of course.

Were it only so easy.

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Since the start of the Biden Administration on January 20, 2021, the United States has almost called a complete halt in building out (or even repairing and replacing) our existing oil and gas energy infrastructure. One of the new President's first acts was to kill the Keystone XL Pipeline. After months of discussion, the Administration finally informed Canada that the United States no longer would attempt to close Enbridge Line 5.

No assistance has been given to the potential for unlocking the immense natural gas reserves located thirty miles west of Scranton, Pennsylvania, despite the fact that the New York Metropolitan Area, which faces potentially serious energy shortages should 2022 be a bad winter, is located less than 150 miles away, and despite the fact that the reserves in that location are not only abundant, but they are far less prone to contribute to global warming than other fossil fuels.

Instead, the Biden Administration has put nearly all of its energy eggs in the basket of increasing renewables. The bipartisan infrastructure bill contains \$9.5 billion for research into hydrogen-based technologies, \$7.5 billion for electric vehicle charging stations (meaning Elon Musk need not spend his own money on this, the taxpayers will do it for him), and nearly \$1 billion for hydroelectric power and research. There is \$65 billion for energy grid reliability and resiliency updates, but it remains a question of how much of that would go to grids transporting fossil fuels, as opposed to renewable generated electricity.

All of this is well and good, but while the people who still claim there is no climate change seem increasingly like they are ignoring the obvious, so too do those who assert that we can just cut out fossil fuels "cold turkey," or that doing so unilaterally will have a major impact on the planet's climate. In 2020, China added over 73 gigawatts of new coal fired power plant capacity, five times as much as in all other countries.

Without the buy-in of places like China, we cannot possibly make a real dent in global greenhouse gas emissions even if we were to successfully shift all energy production in the United States to so-called renewables under the most optimistic scenario.

This leads to a difficult dilemma for the climate alarmists. In order to be true to their professed beliefs, they must push for strong action to isolate China and extract a large economic price for its fossil fuel increase. This has immense consequences for the world, both economically and geo-politically. To date, the Greta Thunbergs of the world have remained largely silent on China.

Geopolitically, the results of the actions taken by the West yet not copied by countries such as China and Russia weakens American and Western security generally. Without our fossil fuel infrastructure buildout, anomalies like the fact that, during a bad winter, New York may have to import natural gas from places like Russia, will only grow. As gas and oil prices have risen sharply throughout 2021, inflation has risen along with it, taking an ever-larger bite from the paychecks of the working man and woman. Nord Stream 2 remains a thorn in the side of international relations as Russia has completed the pipeline yet due to its adventures on the Ukrainian border there are major players arguing that it should not be opened.

If it opens, Russia will have unprecedented opportunity to exert increased influence over Western Europe's economy.

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These same contradictions run throughout the energy world. Those who seek to increase electric car usage, virtually overnight, fail to appreciate where that electricity presently comes from (often from power grids that are still based on coal), and just how difficult it will be to move to the nearly 100% green energy model that is their ultimate goal. Those who want to eliminate fossil fuels entirely ignore the fact that the coronavirus has been fought using PPE's made mostly of fossil fuel products and that fossil fuel products are pervasive in society (such as Gortex jackets). Those who want to power the entire country through renewable energy ignore the fact that the energy buildout is now so toxic politically that states won't even allow power lines for renewable energy transmission when it goes to other states.

They also ignore the enormous of amounts of energy that would be created just to build the solar panels and installations, wind turbines, power lines etc. that such a task would involve.

From an energy context, it is like people mostly want to move in a similar direction, but they are approaching it by flying on two separate planets, refusing to find a way to intersect, meet, and find a way forward. Unfortunately, by not having these conversations, we are ensuring that the day of reckoning comes quicker and we are less prepared for it. With Russia still threatening Ukraine, the Beijing Olympics coming up under the shadow of Omicron and inflation surging, that day of reckoning might come quicker than we want or think.