

Tudor Pickering Holt & Co. Equity Research

Morning Note

Energy Thoughts for February 21, 2020

TPH Coffee With The Chairman

We enthusiastically welcomed Dr. Scott Tinker of Switch Energy Alliance

Few phrases have more quickly become part of the vernacular of our industry than has “energy transition”, so we were honored to recently host Dr. Scott Tinker, who began framing the energy transition long before the topic became topical. We’re not convinced that Scott ever sleeps because, by day, he is Director of the Bureau of Economic Geology at The University of Texas at Austin, and the rest of the time he’s the passionate Chairman of Switch Energy Alliance (non-profit, non-partisan organization committed to energy education via fact-based reasoning over feelings-filled rhetoric). Emotions tend to run high in conversations about the role of energy in the global economy and on the environment, so it was incredibly refreshing to hear Scott frame the increasing importance of growing the “radical middle” in thinking critically about how these three important global systems (i.e., energy, economy, environment) interact. Switch Energy Alliance’s initial energy documentary film (Switch) laid the foundation for a common understanding of energy when it was released back in 2012, and we’re eagerly awaiting the Houston premiere (next Wednesday evening) of Scott’s sequel documentary (Switch On) as it tackles the tough topic of energy poverty in the developing world, and will certainly spark constructive conversations about how we, as an industry and as individuals, can all play a role in helping alleviate it in the decades to come.

You can find more information about the organization here: <https://switchon.org/>

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