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OFFICE OF THE DIRECTOR

United States Department of the Interior

NATIONAL PARK SERVICE
WASHINGTON, D.C. 20240

September 6, 1974

NATURAL RESOURCE AND RECREATION ECONOMIC CONFERENCE DALLAS, TEXAS

SEPTEMBER 15-16, 1974

FACT SHEET

TRANSPORTATION:

From D-FW Airport, Surtran Bus/Fare
\$4.00 to Fairmont or Sheraton, does
not (repeat not) serve Hilton Inn.

Surtran taxi - fare ranges from \$13.50 to
\$15.00, depending on what terminal used at
airport to what hotel. Additional passenger
adds 50 cents.

Rent-A-Cars:

All are area code 214:

Hertz	-	574-2000
Avis	-	357-0301
National	-	574-3400
Budget	-	357-1574

Limousine Rentals:

Earl Hayes Leasing Company
214/748-7011

Shuttle Bus:

From hotels to Southern Methodist
University:



Shuttle Bus
Schedule:

SEPTEMBER 16, 1974

8:00 a. m.	DEPART Fairmont Hotel for SMU campus. Stops en route at the Sheraton- Dallas and the Hilton Inn.
8:05 a. m.	DEPART Sheraton-Dallas
8:15 a. m.	DEPART Hilton Inn
8:20 a. m.	ARRIVE Umphrey Lee Student Center for Conference.
→ 5:30 p. m. (approx.)	Bus will DEPART SMU en route hotels and airport.

NOTE:

Maps of the Dallas area will be provided to all participants so that they can get around the city more easily.

HOTELS:

Each participant should make his or her own accommodations in Dallas. The possible alternatives are listed below:

* Fairmont Hotel
1609 Ross Avenue
Dallas, Texas
Phone: 748-5454

<u>Rates:</u>	<u>Singles</u>	<u>Doubles</u>	<u>Suites</u>
	\$31 - 49	\$41 - 59	\$70 - 120

* Site of the Reception and Dinner on September 15. The Reception will be held in the Garden Room on the Terrace Level. The Dinner will be held in the Fountain Room, Terrace Level.



HOTELS: Continued

Sheraton Hotel
2117 Live Oak Street
Dallas, Texas
Phone: 748-6211

<u>Rates:</u>	<u>Singles</u>	<u>Doubles</u>	<u>Suites</u>
	\$22 - 35	\$30 - 43	\$78 - 112

Hilton Inn Hotel
5600 North Central Expressway
Dallas, Texas
Phone: 747-8011

<u>Rates:</u>	<u>Singles</u>	<u>Doubles</u>	<u>Suites</u>
	\$22 - 33	\$28 - 41	None

Southern Methodist University
Mockingbird & Hillcrest Street
Dallas, Texas
Phone: 692-2000

Umphrey Lee Student Center
(Located on SMU campus)
Phone: (Information) 692-2378

(Umphrey Lee Student Center is the
site of the Economic Conference on
September 16.)

*** SPECIAL NOTE:

The Washington Hilton is the headquarters
hotel for the final Economic Conference in
Washington, September 27 & 28. A large
block of rooms have been set aside. Delegates
to the Conference should contact the Hilton
for accommodations.





United States Department of the Interior

OFFICE OF THE SECRETARY
WASHINGTON, D.C. 20240

SEP 9 1974

Dear Mr. Adams:

I am pleased that you have accepted President Ford's invitation to attend the meeting on natural resources and recreation in Dallas, Texas, on September 16, 1974. We plan to hold our meeting in the Umphrey Lee Student Union Center of the Southern Methodist University Campus. I am enclosing a draft agenda. Please note that we plan a reception and dinner at the Fairmont Hotel on the evening of Sunday, September 15. A \$25.00 registration fee (cash or check) will be collected at the reception from all attendees to cover the cost of the event.

As indicated in the agenda, we are establishing four working groups, each to meet separately on the morning of the 16th and make its report to the plenary session in the afternoon. You are tentatively assigned to the working group on Oil and Gas. There will be a member of my staff available to serve each working group as needed; and members of Congress and other Federal officials, who have been invited to the meeting because of their expertise, will also participate in the working group deliberations.

Time will be very short and at a premium on the 16th. In order to maximize the effective use of our time, President Ford included a list of questions for our consideration with his letter of August 30. With the same objective, I have tried to recast and supplement these questions for consideration by each working group. These questions, together with some background material and detailed logistical information for our meeting, are also enclosed.

The major purpose of this meeting is to get input from you and other leaders from the private sector. The questions, materials, and agenda that have been provided you are intended only as helpful suggestions. They are not intended to limit the scope of our discussion. Please advise us by phone, or letter, of any points or materials you believe should receive specific attention at our meeting. And please feel free to submit written material for the record of our meeting, either at the meeting or within a few days thereafter. I have designated Deputy Under Secretary Jared G. Carter (202/343-2182) to handle the administrative details of this meeting; and he will be responsive to your questions and suggestions.



Save Energy and You Serve America!



Because we did not budget for this conference, we must ask you to bear your own expenses in connection with this meeting.

I look forward to working with you. I, and my colleagues from Interior and the other Federal agencies and the Congress, want to listen carefully to your ideas, concerns and specific action proposals. I am confident that our efforts will result in a substantial contribution to the conference chaired by the President on September 27 and 28.

Sincerely yours,

Rogers C. Baston
Secretary of the Interior

Mr. John H. Adams
Executive Director
Natural Resource Defense Council, Inc.
15 West 44 Street
New York, New York 10036

Enclosures



DEPARTMENT of the INTERIOR

news release

All participants not included

OFFICE OF THE SECRETARY

Ed Essertier (202) 343-3171

For Immediate Release (September 10, 1974)

INTERIOR DEPARTMENT ANNOUNCES AGENDA FOR ANTI-INFLATION CONFERENCE IN DALLAS

The Department of the Interior today announced a tentative agenda for a top-level Natural Resources, Recreation and Environmental Conference on Inflation to be held September 16 in Dallas, Texas.

Interior Secretary Rogers C. B. Morton will chair the all-day conference, which is one of 13 being held throughout the Nation under joint White House--Congress sponsorship to develop programs to combat inflation. President Ford opened the series of conferences in Washington on September 5. They will culminate in Washington on September 27 and 28.

Administration officials, members of the Senate and House, educators, and representatives of energy, mining, recreation and forest products industries, utilities, water users, conservation and consumer groups, will take part in the Interior conference, which will assemble on Sunday evening, September 15, at the Fairmont Hotel in Dallas. Secretary Morton, U. S. Senator John Tower, and Chancellor Willis M. Tate of Southern Methodist University will welcome the delegates at a reception and kickoff dinner for the participants in the conference.

On Monday, September 16, delegates will meet at the Umphrey Lee Student Center at SMU, beginning at 9 a.m. The delegates will first hear a report on the state of the economy by Gary L. Seevers, of the Council of Economic Advisers, and on the Federal budget by Frank G. Zarb, Associate Director of the Office of Management and Budget for Natural Resources, Energy and Science.

The conference will then break into four working groups for general discussions in four areas: Oil and Gas, Minerals and Materials, Coal and Electrical Generation, and Recreation and the Environment.

The working groups will report to the afternoon plenary session on the issues and their conclusions. Delegates in the afternoon session will discuss the major recommendations to submit to the Washington sessions. Secretary Morton will summarize the overall conference at its conclusion.

(over)



DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT
NEWSPAPER RELEASE

Among those who have accepted President Ford's invitation to take part in the Dallas conference are:

U. S. Senators Paul J. Fannin of Arizona, Clifford P. Hansen of Wyoming, and Floyd K. Haskell of Colorado; U. S. Representatives John B. Anderson of Illinois, Craig Hosmer and Harold T. Johnson of California, and Roy A. Taylor of North Carolina; Governor Dolph Briscoe of Texas.

John H. Adams, Executive Director, Natural Resource Defense Council, Inc., New York; Brown Badgett, President, Brown Badgett, Inc., Greenville, Ky.; S. Barker, Jr., President, Island Creek Coal Co., Lexington, Ky.; J. Robert Barkley, President, National Water Resources Association, Loveland, Colo.; Darrell Booth, Kampgrounds of America, Inc., Billings, Mont.; William M. Calhoun, President and General Manager, Day Mines, Inc., Silverton, Idaho; Marion Clawson, President, Resources for the Future, Inc., Washington, D. C.

S. David Freeman, Director, Energy Policy Project, Washington, D. C.; John L. Kemmerer, Jr., President, Kemmerer Coal Co., New York; E. B. Leisenring, Jr., President, Westmoreland Coal Co., Philadelphia; E. W. Littlefield, Chairman, Utah International, Inc., San Francisco; Charles Luce, Chairman, Consolidated Edison Co., New York; Professor Paul MacAvoy, Massachusetts Institute of Technology, Cambridge, Mass.

Ian MacGregor, Chairman, AMAX, Inc., New York; Michael McCloskey, Executive Director, Sierra Club, San Francisco; Margaret Mickey, Concern, Inc., Washington, D. C.; Professor Edward Mitchell, University of Michigan, Ann Arbor, Mich.; Richard O'Shields, Panhandle Eastern Pipeline Co., Houston; John W. Partridge, Chairman, Columbia Gas System, Inc., Wilmington, Del.

Alex Radin, General Manager, American Public Power Association, Washington, D. C.; Dwight F. Rettie, Executive Director, National Recreation and Park Association, Arlington, Va.; Wilton E. Scott, President and Chief Executive Officer, Tenneco, Inc., Houston; John W. Simmons, President, Water Resources Congress, Orange, Texas; Elvis J. Stahr, President, National Audubon Society, New York; Wesley Steiner, Colorado River Basin, Phoenix, Ariz.; William Stimpson, Board Chairman, Gulf Lumber Co., Inc., Mobile, Ala.; H. A. True, Jr., True Oil Co., Casper, Wyo.; A. J. Wagner, Chairman and Director, Tennessee Valley Authority, Knoxville, Tenn.; George H. Weyerhaeuser, President, Weyerhaeuser Co., Tacoma, Wash.; and M. A. Wright, Chairman and Chief Executive Officer, Exxon U.S.A., Houston.

The conference on September 16 will be open to the public as space permits. Written statements for the record on problems and possible solutions for inflation are being encouraged from groups and individuals.

x x x

REGARD R. FORD

as much as possible
- Two Blue
- Suite - date 2-27

O: 1 + Gas Group

Jr. Ball Rm. Level

- Consumer Interest - Nat. Gas Derogulation (oppose)
- Individual - Nat Gas Derog. (oppose)
- Environmental Controls (Prevention Measure) suggest

David Freeman - Energy Policy Council

- Supports Conservation efforts (Major solution 150 million → consumers)
- Not further increase in petrol products. Freeze on further increase
- and roll back on current Petroleum Products
- Stock pile policy

Sen. Haskel

Wilton Scott

- No shortage in world petroleum products
- Anticipate significant increase in price of crude oil (World wide problem)
- Gov. Control

Day for anti
(202) 456-6554 - Defense Production Act (steel) →

cancel appoint - Nat. Farmers Union

(0-202) ↔

John

2507 Calchew

✓ Crk soon after

749-1011

← I have decided

2MS 1425 →



Minerals + Materials

- Minerals Problem (Safety Regulation May be too restrictive)
- Uncontrollable demand
- Gov. Control (low) - (not sure)

1st Floor

Conf

101

San Antonio

Mr. Ross

ITINERARY - NORM ROSS
Dallas, Texas Sept. 15 & 16

Check-in	1:15 p.m. Sept. 15	Andrews Air Force Base <i>Passenger Bldg.</i>
Departure	1:30 p.m. Sept. 15	Andrews Air Force Base
Arrival	3:20 p.m. Sept. 15	Dallas - Ft. Worth Airport
Conference Begins	5:00 p.m. Sept. 15	Fairmont Hotel, Dallas (214) 748-5454
Conference Begins	8:00 a.m. Sept. 16	SMU campus, Dallas (214) 363-2368
Departure	6:15 p.m. Sept. 16	Dallas - Ft. Worth Airport
Arrival	10:00 p.m. Sept. 16	Andrews Air Force Base



Senate

Gaylord Nelson

Floyd K. Haskell

Paul J. Fannin

Clifford P. Hansen

House

Harold T. Johnson

Roy A. Taylor

Craig Hosmer

John B. Anderson

Federal Officials

Russell Peterson

Chairman

Council on Environmental Quality

Duke Ligon

Assistant Administrator

Federal Energy Administration

John N. Nassikas

Chairman

Federal Power Commission

Robert W. Long

Assistant Secretary--Conservation,
Research and Development

Department of Agriculture



Oil & Gas

Honorable Dolph Briscoe
Governor of Texas
State Capitol
Austin, Texas 78711

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Casper, Wyoming 82601

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Chairman & Chief Exec. Off.
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Houston, Texas 77001

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Northeast Petroleum
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Chelsea, Mass. 02150

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Chairman
Columbia Gas System, Inc.
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Wilmington, Delaware 19807

Mr. Richard O'Shields
Panhandle Eastern Pipeline Co.
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Houston, Texas 77001

Mr. Wilton E. Scott
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Ann Arbor, Michigan 48104

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Chairman and President
Union Oil Company of California
Union Oil Center
Los Angeles, Calif. 90017

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Cabot Corporation
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Executive Director
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Detroit, Michigan 48202

Mrs. Carol Foreman
Executive Director
Consumer Federation of America
1012 - 14th Street, N. W.
Washington, D. C. 20005



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Pacific Gas & Electric
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Chairman and Director
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General Manager
American Public Power Assn.
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Mr. Wesley Steiner
Colorado River Basin
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Phoenix, Arizona 85004

~~Mr. Daniel A. Poole
Chairman
Citizens Committee on
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1346 Connecticut Ave., N.W.
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Chairman
Utah International, Inc.
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San Francisco, Calif. 94104

Mr. Elvis J. Stahr
President
National Audubon Society
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Executive Director
National Recreation & Park Assn.
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Arlington, Virginia 22209

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Association Kampgrounds
of America, Inc.
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Billings, Montana 59103

Lawrence M. Jones
President
Coleman Company
250 N. St. Francis
Wichita, Kansas 76201

Mr. John Simmons
President
Water Resources Congress
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Orange, Texas 77630

Mr. Michael McCloskey
Executive Director
Sierra Club
1015 Mills Tower
San Francisco, Cal. 94104

Miss Margaret Mickey
Concern, Inc.
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Washington, D. C. 20007

Mr. S. L. Richardson
Vice President
Outboard Marine Corp.
100 Sea Horse Drive
Waukeegan, Illinois 60085



Minerals & Materials

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1270 Ave. of the Americas
New York, N. Y. 10020

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President & General Mgr.
Day Mines, Incorporated
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Silverton, Idaho 83867

Mr. Edward B. Walker
Ex. Vice President
Gulf Oil Corporation
439 Seventh Avenue
Pittsburgh, Pa. 15230

Mr. George H. Weyerhaeuser
President
Weyerhaeuser Company
Tacoma, Washington 98401

Mr. William Stimpson
Chairman of the Board
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Mobile, Alabama 36601

Mr. J. Robert Barkley
President
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Loveland, Colorado 80537

Mr. Marion Clawson
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Ms. Betty Furness
Consumers Union
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New York, N. Y. 10022

Dr. Richard L. Leshner, President
National Center for Resource
Recovery, Inc.
1211 Connecticut Ave., N. W.
Washington, D. C. 20036

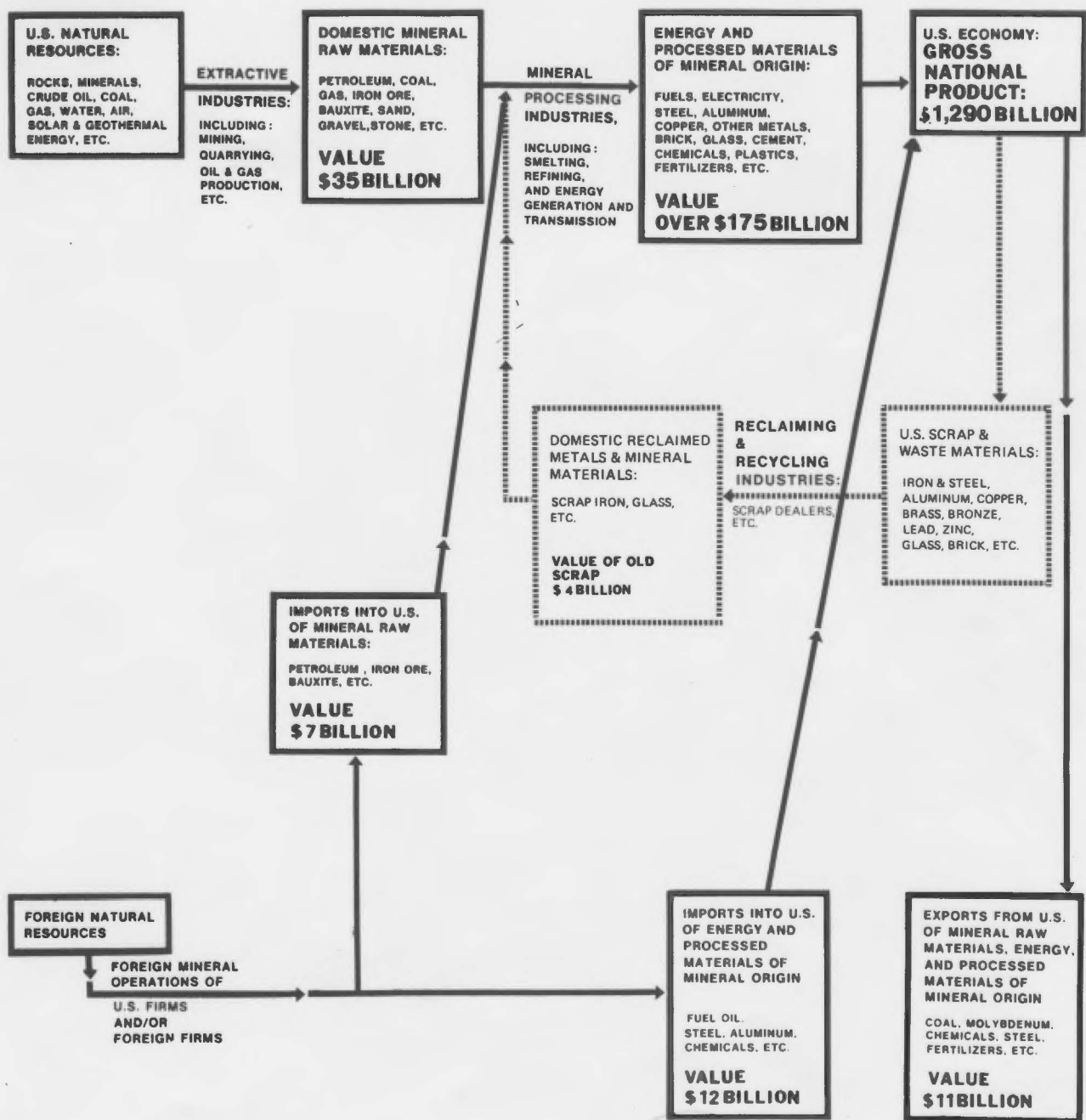
Mr. Milton Herbert, President
Northwest Timber Association
Herbert Lumber Company
Riddle, Oregon 97469

Mr. Nels W. Stalheim
President
Federal Resources Company
1370 South 400 West
Salt Lake City, Utah 80215



THE ROLE OF MINERALS IN THE U.S. ECONOMY

(ESTIMATED VALUES FOR 1973)



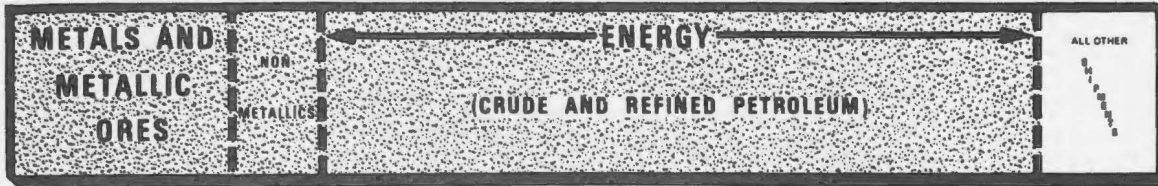
Reference

Table 35- Indicate that of the Average enrolled per school in the area parishes having the highest per pupil cost. There by the common. Therefore, what would be per capita for the total. The table would have to be played it. Don't say that.

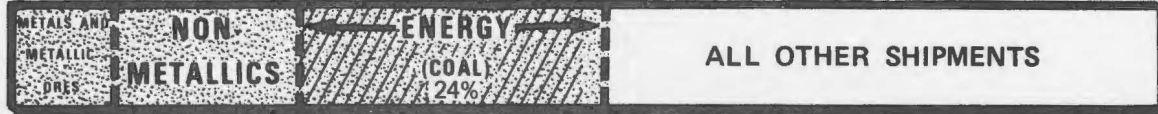


MINERALS ARE MAJOR TRANSPORTATION USERS

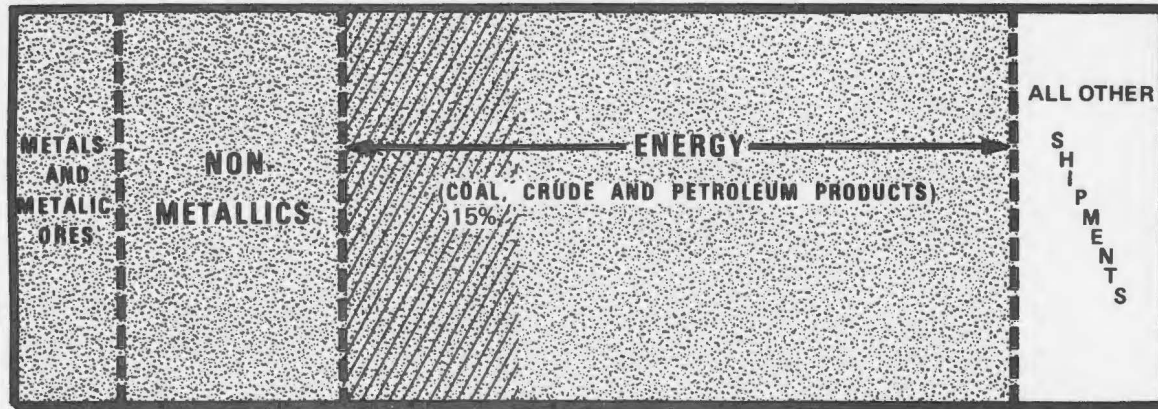
U.S. WATERBORNE IMPORTS 1972 = 398 MILLION TONS



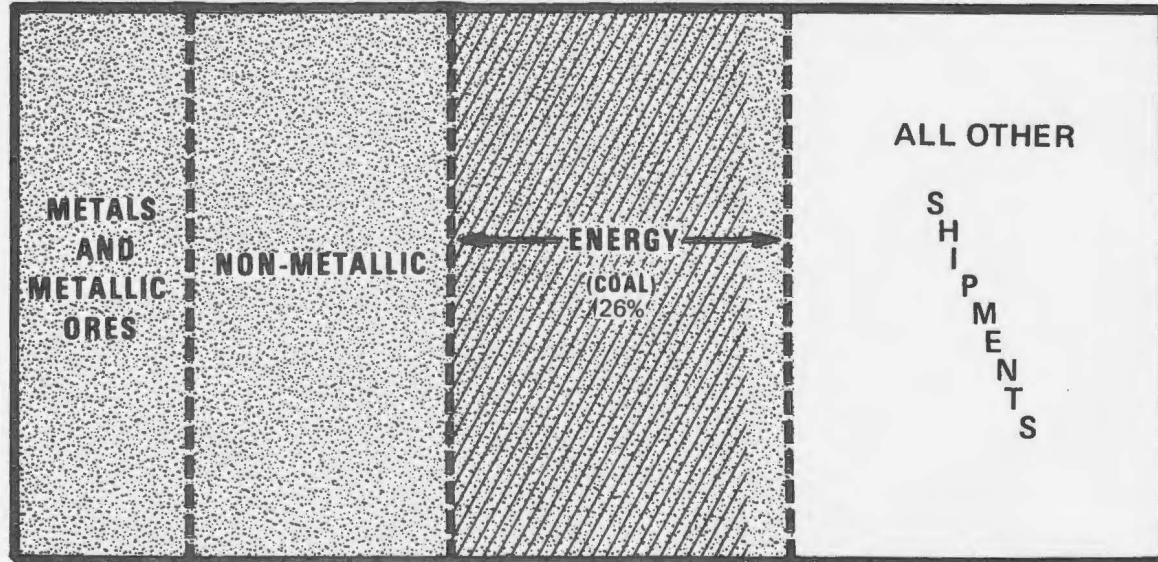
U.S. WATERBORNE EXPORTS 1972 = 232 MILLION TONS



DOMESTIC WATERBORNE COMMERCE 1972 = 987 MILLION TONS



DOMESTIC RAIL TRAFFIC 1972 = 1,433 MILLION TONS



COAL AS A PERCENTAGE OF TOTAL SHIPMENT



THE CURRENT STATUS OF THE U.S. MINING INDUSTRY AND THE NEED FOR BOTH INCREASED PRODUCTION AND INCREASED PRODUCTIVITY

Dr. John D. Morgan, Jr.
Assistant Director - Mineral Position Analysis
Bureau of Mines, Department of the Interior

ABSTRACT

The U.S. economy annually needs over 4 billion tons of new mineral supplies. The value of domestically produced energy and processed materials of mineral origin exceeds \$175 billion annually, but domestic production of both raw and processed minerals is not keeping pace with demand.

* * * * *

Mining and agriculture are the primary sources of all new wealth and minerals are the lifeblood of any industrialized civilization. Annually, the economy of the United States now requires over 4 billion tons of new mineral supplies. Two decades ago that tonnage was only half as large, while projections indicate that demand could nearly triple from present levels by the year 2000.

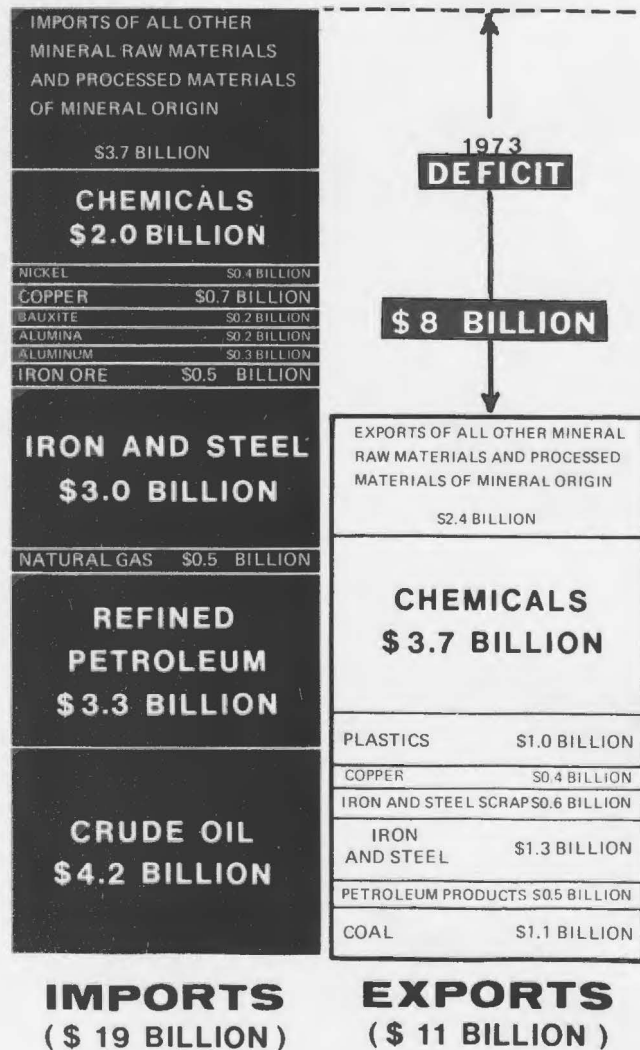


Fig. 1. U.S. Mineral Import Deficit - 1973

In 1973 the U.S. economy reached a new annual high of \$1,288 billion, increasing each quarter. However, there was a relative plateauing in the last quarter of the year, reflecting the impact of the "energy crisis" precipitated by the Arab oil embargo. The value of domestically produced energy and processed materials of mineral origin was estimated to be more than \$175 billion in 1973, based largely on mineral raw materials of domestic origin valued at \$35 billion, supplemented by imports of raw and processed mineral materials valued at \$19 billion. Imports were, however, offset to some degree by exports of raw and processed minerals valued at \$11 billion, leaving a net U.S. deficit of the order of \$8 billion. This deficit, which has been increasing over the years, is a major factor pointing to the need for increased domestic productivity. As detailed in Fig. 1, crude and refined petroleum and iron and steel were the major items contributing to the net deficit position. Imports of both those major materials have been rising steadily over the past two decades, as shown in Figs. 2 and 3.

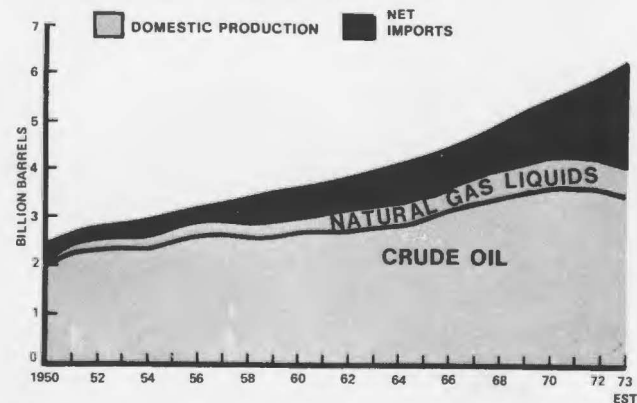


Fig. 2. U.S. Supplies of Petroleum - 1950 thru 1973

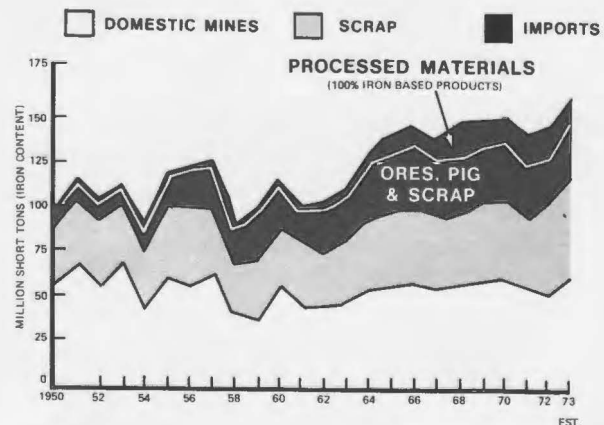


Fig. 3. U.S. Supplies of Iron and Steel - 1950 thru 1973

In 1973, domestic production of most major metals, led by a 14 percent rise in domestic raw steel production, was up somewhat and domestic production of most nonmetallurgics was also up. However, on an overall basis, domestic mineral production is not keeping pace with domestic demand. In 1973 demand for minerals was stimulated in part by business expenditures for new plant and equipment estimated at \$100 billion, while the value of new construction put into place was valued at \$135 billion. Demand for motor vehicles also stimulated demand for minerals because about one-fifth of our steel and proportional quantities of many other minerals are so used: 1973 production of new automobiles was up 9 percent to a total of 9,667,000 units and truck production was up 21 percent to a total of 3,014,000 units.

Despite a variety of price controls in effect in 1973 pursuant to the Economic Stabilization Act of 1971, as amended, the wholesale price indexes of major mineral commodity groups increased. The 1973 indexes, based on 1967 = 100, were as follows: metals and metal products, up 7.5% to 132.8; non-metallic mineral products, up 3.3% to 130.2; chemicals and allied products, up 5.6% to 110.0; and fuels and related products and power, up 23% to 145.5. These price increases are another major factor pointing to the need for increased productivity. Domestic price controls were alleged to have created a number of anomalies in the mineral industry in 1973, including such diverse impacts as creating domestic "shortages" of ammonium nitrate for fertilizers and explosives, of roof bolts for coal mine safety, and of domestic copper, lead, zinc, and other materials in instances where world prices rose significantly above domestic prices and where United States export controls were either not in effect or inadequate. The President, in his February 1, 1974, "Economic Report to the Congress" recognized the importance of free markets, stating:

"In the past several years, under the pressure of emergency conditions, we have made great, but temporary, departures from reliance on free prices and free markets. In special circumstances and for short periods these departures have been helpful. But taken together, these experiences have confirmed the view that the free market is, in general, our most efficient system of economic organization, and that sustained and comprehensive suppression of it will not solve the inflation problem."

In line with this philosophy, price controls on all metals except steel, copper, and aluminum were lifted completely in December of 1973, and controlled rises in some of these product areas were permitted. All price controls expired on April 30, 1974, except those on petroleum.

In mid-1973, the Secretary of the Interior issued his "Second Annual Report Under the Mining and Minerals Policy Act of 1970." Stating that "development of domestic mineral resources is not keeping pace with domestic demand," he cited nine major problem areas confronting the mining, minerals, metal, mineral reclamation, and energy industries as follows:

- "(1) Mineral imports have an unfavorable impact upon the U.S. balance of trade and upon the U.S. balance of payments;
- "(2) Expropriations, confiscations, and forced modifications of agreements have severely modified the flow to the U.S. of some foreign mineral materials produced by U.S. firms operating abroad, and have made other materials more costly;

- "(3) U.S. industry is encountering greater competition from foreign nations and supranational groups in developing new foreign mineral supplies and in assuring the long-term flow of minerals to the United States;
- "(4) Development of the U.S. transportation net is not keeping pace with demand, thus seriously affecting the energy and minerals industries;
- "(5) Removal of billions of tons of minerals annually from the earth contributes to a variety of disturbances;
- "(6) The U.S. mining, minerals, metal, and mineral reclamation industries are encountering increasing difficulty in financing needed expansion of capacity and the introduction of new or improved technology;
- "(7) Management of the resources of the public lands, including the continental shelves, must be improved;
- "(8) The factual basis for the formulation and implementation of environmental regulations must be improved, so that man and nature are properly protected with minimum dislocation of important economic activities; and
- "(9) The U.S. Government information base for the conduct of its mineral responsibilities is grossly inadequate."

A number of corrective legislative recommendations were made, including creation of a Department of Energy and Natural Resources, provision of an organic act for the Bureau of Land Management, revision of the mineral leasing laws, regulation of surface mining activities, amendment of the Natural Gas Act, construction of deep-water ports, and modification of right-of-way limitations, but only the latter, as the Alaska Pipeline Bill, was enacted into law in 1973, and the other recommendations were carried forward into the considerations of the Congress in 1974. Also in mid-1973, the National Commission on Materials Policy issued its "Final Report" which made 177 detailed recommendations, those affecting minerals being in close agreement with the Mineral Policy Report. Perhaps, the most significant recommendation of the NCMP was that-

"it should be the policy of the United States to rely on market forces as a prime determinant of the mix of imports and domestic production in the field of materials but at the same time decrease and prevent wherever necessary a dangerous or costly dependence on imports."

While our economy has grown over the years, that of the world has increased even more, so that today we are finding ever increasing competition when it comes to acquiring needed raw materials, while, at the same time, we are also finding it increasingly difficult to sell many manufactured articles in world markets to pay for imported raw materials. Two decades ago, the United States produced about one-half of the world's steel as shown by Fig. 4, whereas today, despite growth, we now only produce one-fifth. Similarly, as shown by Fig. 5, where we once produced larger fractions, today we produce only one-fourth of the world's refined petroleum, and one-third of the world's aluminum metal. And, as shown by Fig. 6, we are dependent upon imports for substantial portions of a number of important mineral materials. Lessening such dependence by increasing domestic production and/or productivity would be highly desirable.



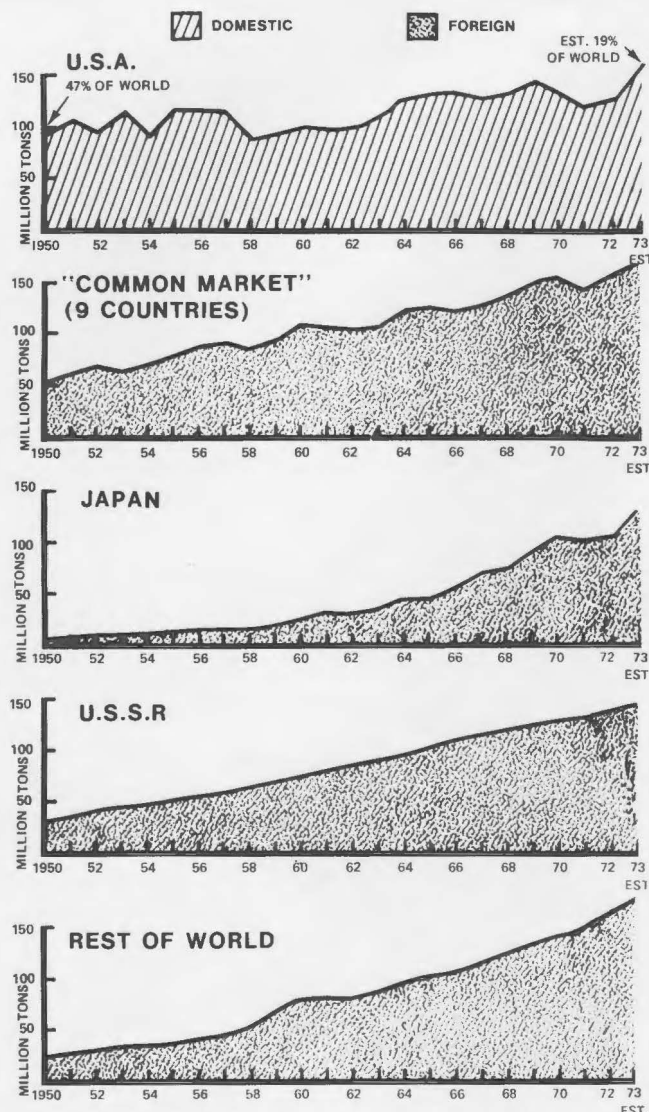


Fig. 4. World Steel Production - 1950 thru 1973



Fig. 5. U.S./World Production - 1950 and 1973

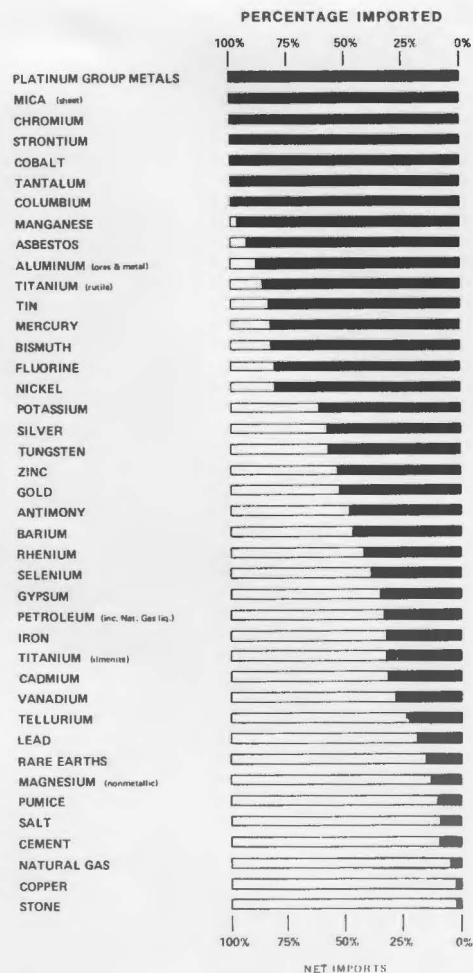
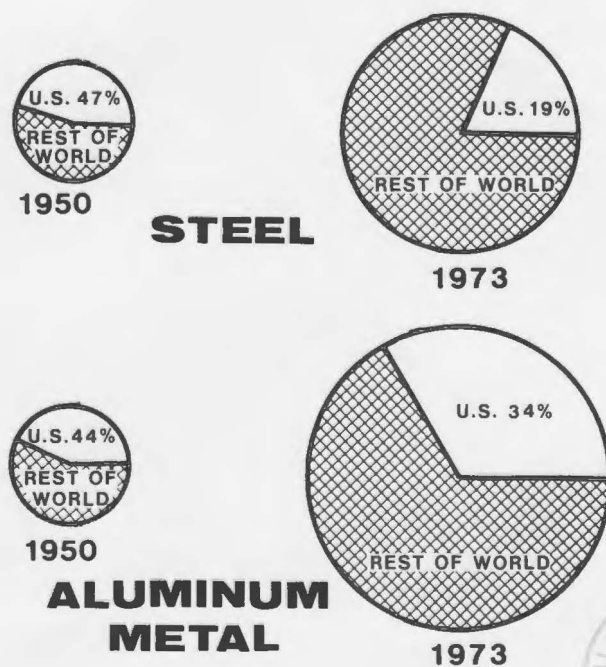


Fig. 6. U.S. Dependence Upon Imports - 1973



The natural resources of the United States are vast, but to be useful to man natural resources must be found, developed, and processed. The natural resources of any nation are related to its size, its geology, and its location on the earth. Only one nation - the Union of Soviet Socialist Republics - substantially exceeds the United States in land area, and only four other nations - the People's Republic of China, Canada, Brazil, and Australia - have land areas about the size of the United States. In addition to its land area, the United States has extensive continental shelves and direct access to the seas and the seabeds of the world. The United States has almost every type of geologic formation within its borders. As a consequence of its size, geology, and geography, the United States has vast resources of rocks and minerals, soils, subsurface fluids (including oil and gas), waters, and air.

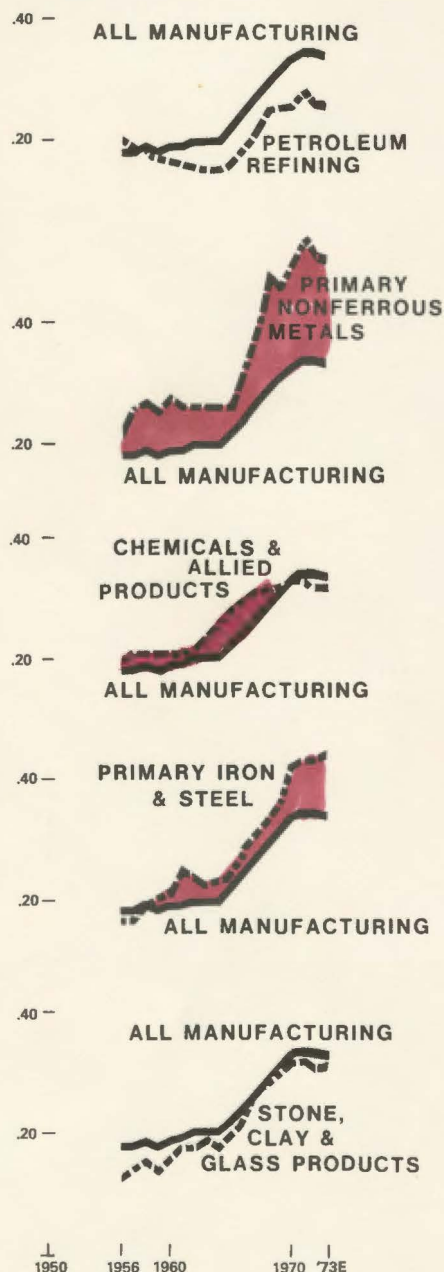


Fig. 7. Debt/Equity Ratios - 1956 thru 1973

However, to convert natural resources into useful materials technology must be continuously improved; the technology must be workable at reasonable prices; the processes must be compatible with environmental regulations and industrial health and safety standards; and the business must yield profits comparable with other economic activities. Examination of Fig. 7 covering debt/equity ratios and of Fig. 8 covering profits as a percent of stockholders' equity indicates that some major segments of the mineral industry are not in as satisfactory position as "all manufacturing" as a whole. Consequently, improvement of productivity is essential.

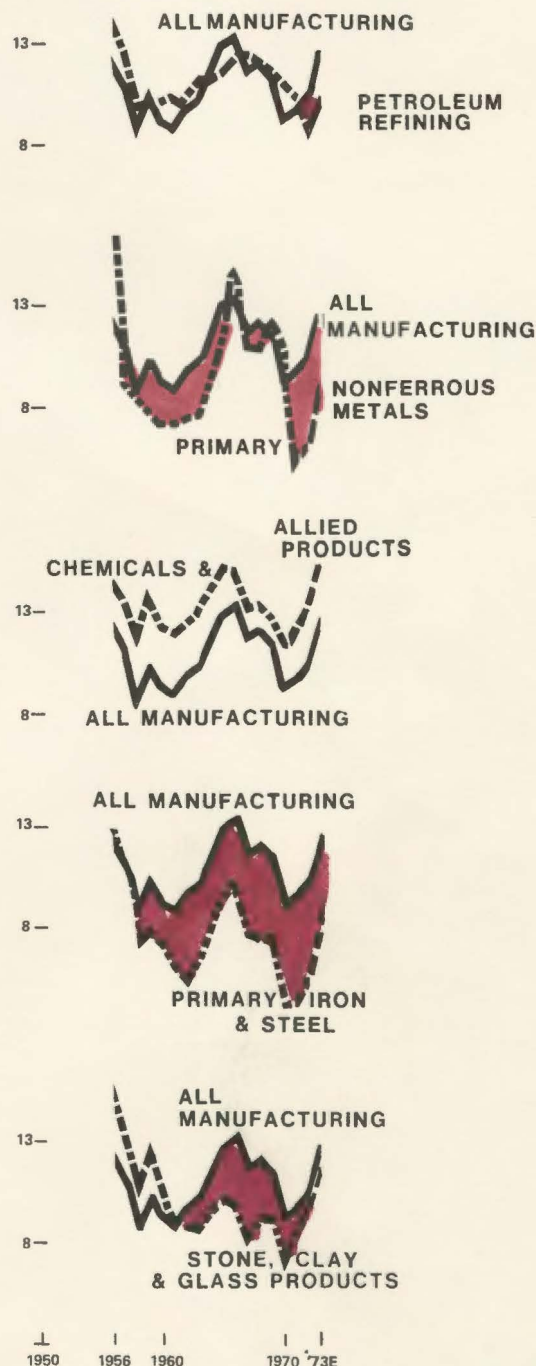


Fig. 8. Profits as a Percent of Stockholders' Equity - 1956 thru 1973



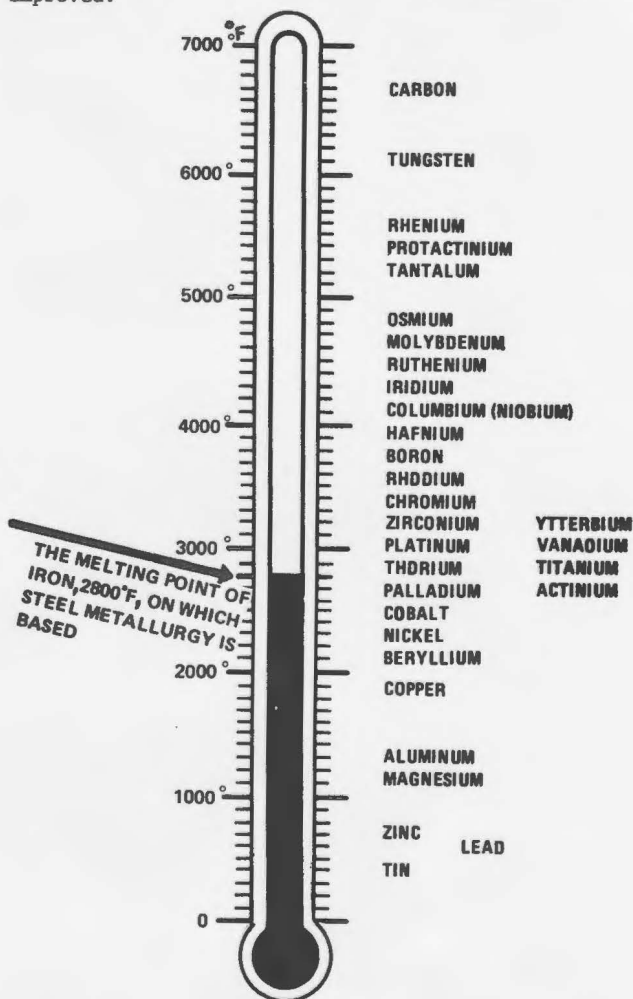
Mineral deposits generally are harder to find and assess than agricultural resources, because most mineral deposits are located out of sight below the earth's surface. Our deepest mines have penetrated only somewhat beyond a mile in a few places and our deepest wells only to about six miles in a few places. Our deepest dredges now operate in only a few hundred feet of water; yet it is nearly four thousand miles to the center of the earth. Through the study of geological maps and the making of complex geophysical and geochemical measurements skilled geologists can, in some cases, infer what lies below the surface. Obviously, in areas where the rock strata are relatively uniform and cover many square miles, inferences as to what may be found below are better than in areas of very complex geology where heat, pressure, and earth movements have greatly deformed the rocks. Mineral deposits that have been found, adequately drilled to determine their content of valuable minerals, and that can be mined, processed, and converted into useful materials with known technology at reasonable prices are commonly called "reserves." (Example: the rocks of the earth's crust average 5% iron, the United States has vast "resources" of rocks containing more than 5% iron; the iron ore "reserves" of the United States are 10,000,000,000 tons, which in turn contain 2,000,000,000 tons of recoverable iron metal, compared to U.S. steel production of 151,000,000 tons in 1973). Agricultural materials are generally renewable in relatively short time spans, in that some crops can be raised four or five times a year, annual cycles are common, and softwood trees can be raised on fifteen to twenty year cycles. Mineral deposits, however, normally are formed only over much longer periods of time - usually tens of millions or hundreds of millions of years. Consequently, the total supply of all minerals accessible to man in the earth's crust is, to all practical purposes, relatively fixed; consequently, mineral materials are generally of greater concern to nations with heavy industry.

Other than in nuclear processes, elements are neither created nor destroyed - man's processing merely combines them in certain ways, recombines them, or reduces combinations into elemental form. Thus, the materials industries are engaged in extracting elements from natural materials, and/or combining or recombining them into forms useful to man. Nature itself is constantly engaged in vast processing activities, in which the "carbon-oxygen" and "nitrogen" and "hydrologic" cycles are major examples.

For many purposes interchangeabilities in materials are possible. (For example: rubber can be made from: natural latex from rubber trees, carbon and hydrogen from alcohol from grain or other agricultural materials, carbon and hydrogen from hydrocarbons from petroleum, natural gas, coal, etc.; and buildings can be constructed from: steel, aluminum, copper, glass, stone, slate, concrete, tile, wood, plastics, plywood and many, many other materials.)

However, in specialized technological applications in which a multiplicity of properties are required, (for example: a combination of strength, electrical conductivity, temperature resistance, corrosion resistance, and creep resistance) the available materials are much more limited. If we are to achieve substantial breakthroughs in metallurgy, chemical processing, and energy generation, we must have greatly improved

temperature-resistant materials, yet Fig. 9 shows that there are only a very limited number of elements which possess such properties. Here, too, the "productivity" of our alloys and refractories must be improved.



[THIS CHART SHOWS ALL KNOWN ELEMENTS ABOVE IRON AND MAJOR METALS MELTING AT LOWER TEMPERATURES]

Fig. 9. Melting Points of Selected Elements

Today improvement of productivity in the mining, minerals, metal, mineral reclamation, and energy industries requires accelerated development of new and improved technology and rapid introduction thereof into all stages including:

- Exploration
- Mining and petroleum and natural gas production
- Processing
- Use
- Recovery and Recycling

In all of the above appropriate provision must be made for the health and safety of workers and for environmental enhancement through: minimizing air, water, and land pollution; land restoration; and esthetic improvement.

Further, because many important minerals are initially large bulk items, mineral production is heavily dependent on the United States transportation infrastructure. Minerals account for:

- 90% of all U.S. waterborne imports
- 50% of all U.S. waterborne exports
- 85% of all domestic waterborne commerce
- 70% of all railroad traffic
- 100% of all pipeline traffic

Consequently, improvements in rail and water transportation are of direct concern to major segments of the domestic mineral industry.

The resources of industry, government, and of academia, must be brought to bear on current major problems, including:

- **Discovery and assessment of resources presently untouched by our deepest mines and wells.
- **Development of safe and efficient coal mining systems to significantly increase underground extraction ratios from the present level of about one-half.
- **Development of improved petroleum recovery methods to significantly increase extraction ratios above the present level of about one-third.
- **Development of underground and surface mining methods to minimize degradation of the land surface, subsidence, and harm to surface and sub-surface waters.
- **Development of clean burning solid, liquid, and gaseous fuels from coal, petroleum, and other energy materials.
- **Improvement of combustion processes to increase efficiency and to reduce emissions of fumes and particulates.
- **Improvement of electricity generation, transmission, and conversion methods.
- **Development of new energy sources including geothermal and solar.
- **Development of stronger, lighter, corrosion-resistant and temperature-resistant materials.
- **Improvement of recycling techniques to conserve natural materials and energy, and to promote environmental enhancement.
- **Stimulation of measures to conserve energy and materials in actual or potential short supply.

In the Department of the Interior, the Geological Survey, the Office of Coal Research, and the Bureau of Mines, under the immediate direction of the Assistant Secretary--Energy and Minerals, and the Secretary, are working closely together in furtherance of the above objectives to improve our domestic minerals position.

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(This paper was prepared for the
"Conference on Productivity in Mining"
May 13-15, 1974, at Rolla, Mo.,
Sponsored by the Mining Departments of the following:
University of Missouri - Rolla,
Pennsylvania State University,
University of Arizona).



DEPARTMENT OF THE INTERIOR

Statement of Appropriations and Outlays
FY 1973, 1974, 1975

	1973		1974		1975	
	Appropriation	Outlays	Appropriation	Outlays	Appropriation	Outlays
<u>Oil and Gas</u>	80,161	76,946	109,775	110,297	180,560	173,461
<u>Minerals and Materials</u>	815,328	732,402	727,787	749,658	948,345	1,003,589
<u>Recreation</u>	723,564	590,532	585,870	681,373	879,274	835,368
<u>Electrical Generation</u>	390,128	338,585	477,948	419,243	682,182	571,939
Total	<u>2,009,181</u>	<u>1,738,465</u>	<u>1,901,380</u>	<u>1,960,571</u>	<u>2,690,361</u>	<u>2,584,357</u>



DEPARTMENT OF THE INTERIOR

OIL AND GAS
Category

Appropriations and Outlays
F.Y. 1973 - F.Y. 1975
(In thousands)

Bureau	1973		1974		1975	
	Appropriation	Outlays	Appropriation	Outlays	Appropriation	Outlays
<u>Bureau of Mines</u>						
Petroleum & natural gas stimulation	3,518	3,100	6,515	6,372	26,018	22,275
<u>Geological Survey</u>						
Oil & gas resource assessment and leasing activity	20,953	19,381	26,579	27,474	55,032	53,186
<u>Bureau of Land Management</u>						
Leasing & exploration OCS & upland	55,690	54,465	76,681	76,451	99,510	98,000
TOTAL, Oil and Gas	80,161	76,946	109,775	110,297	180,560	173,461

Office of Budget
Sept. 4, 1974.

DEPARTMENT OF THE INTERIOR

Minerals and Materials
Category

Appropriations and Outlays
F.Y. 1973 - F.Y. 1975
(In thousands)

Bureau or Office	1973		1974		1975	
	Appropriation	Outlays	Appropriation	Outlays	Appropriation	Outlays
Bureau of Land Management	\$ 161,934	\$ 158,371	\$ 175,211	\$ 174,685	\$ 191,495	\$ 232,845
Bureau of Reclamation	328,636	279,804	229,990	243,819	235,434	322,470
Office of Water Research and Technology	41,175	41,200	17,396	26,800	16,892	20,592
Geological Survey	128,434	119,058	145,765	150,926	191,668	185,314
Bureau of Mines MESA	155,149 (65,307)	133,969 (53,235)	100,385 --	98,163 --	194,943 --	169,161 --
Mining Enforcement and Safety Administration	--	--	59,040	55,265	67,913	73,207
TOTAL, Minerals & Materials	<u>815,328</u>	<u>732,402</u>	<u>727,787</u>	<u>749,658</u>	<u>948,345</u>	<u>1,003,589</u>

Office of Budget
Sept. 4, 1974

DEPARTMENT OF THE INTERIOR

Recreation

Appropriations and Outlays
F.Y. 1973 - F.Y. 1975
(In thousands)

Bureau or Office	1973		1974		1975	
	Appropriation	Outlays	Appropriation	Outlays	Appropriation	Outlays
Bureau of Land Management	\$ 13,380	\$ 12,999	\$ 13,785	\$ 13,764	\$ 14,996	\$ 14,000
Bureau of Reclamation	9,065	7,627	9,156	8,709	16,084	14,477
Bureau of Outdoor Recreation	304,222	209,340	80,919	246,800	305,210	277,260
Fish and Wildlife Service	158,822	151,641	181,290	162,300	207,536	196,688
National Park Service	238,075	208,925	300,720	249,800	335,448	332,943
TOTAL, Recreation	<u>723,564</u>	<u>590,532</u>	<u>585,870</u>	<u>681,373</u>	<u>879,274</u>	<u>835,368</u>

Office of Budget
Sept. 4, 1974

DEPARTMENT OF THE INTERIOR

Electrical Generation

Appropriations and Outlays
F.Y. 1973 - F.Y. 1975
(In thousands)

Bureau or Office	1973		1974		1975	
	Appropriation	Outlays	Appropriation	Outlays	Appropriation	Outlays
COAL						
Office of Coal Research	\$ 46,961	\$ 36,505	\$ 133,400	\$ 60,700	\$ 274,278	\$ 207,000
UTILITIES						
Bureau of Reclamation	187,519	159,293	196,470	198,272	211,243	190,119
Alaska Power Administration	1,228	992	1,269	1,000	1,300	1,329
Bonneville Power Admin.	146,246	135,234	140,133	154,100	188,000	166,009
Southeastern Power Admin.	941	922	924	800	946	946
Southwestern Power Admin.	7,233	5,639	5,752	4,371	6,415	6,536
Subtotal, Utilities	343,167	302,080	344,548	358,543	407,904	364,939
TOTAL, Electrical Generation	390,128	338,585	477,948	419,243	682,182	571,939

Office of Budget
Sept. 4, 1974



QUESTIONS FOR DALLAS SUMMIT MEETING

Coal and Electric Power Generation Group

1. Coal and oil are the most widely used fuels for generating this Nation's electricity. This situation will probably continue for at least the next 10 to 15 years. Increased oil prices have greatly increased the cost of electricity. Increased air quality standards, among other factors of probably less significance, have raised questions about the long-term viability of coal as a primary fuel and have added to the cost of electricity from coal-fired plants. Technology and capital are not now available to substitute nuclear (much less solar or geothermal) energy for coal and oil in the next few years on a sufficiently large scale to substantially affect the situation caused by these facts. This gives rise to several questions:
 - a. Are there any policy options that can and should be adopted to assure the availability of increasing quantities of oil, and at lower costs, for electric power generation?
 - b. Should the Clean Air Act be amended to facilitate conversion to (and the building of new) coal-fired generation facilities?
 - c. Will the proposed strip-mining act substantially affect the availability and cost of coal?
 - d. What will be the effect on our economy if there is a coal strike this year?
 - e. Have other environmental regulations, or existing health and safety regulations, driven up costs for coal or electricity--and, if so, have these costs produced compensating benefits for the public?
 - f. Are there problems concerning capital availability for the utility and coal mining industries that can and should be remedied by Federal action?
2. What conservation (or demand-reducing) policy options are available? For instance, should an energy use labeling act be adopted; should tax incentives, or pricing policies, be adopted to encourage conservation?
3. What Federal policies should be pursued in the near term to increase the role of nuclear, solar and geothermal energy in electric power generation? For instance, what should be the level of Federal R&D in each area; what licensing (or permit issuing) practices should be followed; should tax incentives, etc., be adopted?



4. For FY 1976, should we continue to hold down the budget for electric generation programs in order to balance the budget or to create a surplus? If some modest budget increases over FY 1975 are desirable, what program should be decreased as a trade-off?
5. Are there particular hardships or inequities connected with the electric power generation industry caused by inflation which should receive immediate attention by the Federal Government?



QUESTIONS FOR DALLAS SUMMIT MEETING

Minerals and Materials Group

1. Domestic production of non-fuel minerals is increasing, but is not keeping up with domestic demand. Costs and prices are increasing. The United States has substantial imports and exports of raw materials and products of this type. Federal policy has impact upon the cost of development, production and distribution of these minerals. What, if any, policy changes should be made to help combat inflation? In particular:
 - a. What policies should be changed, or what legal uncertainties removed, to encourage expansion of domestic production?
 - b. Should our trade policy be changed regarding any segments of this industry to avoid harmful boycotts in the future by encouraging domestic development; or on balance, would it be harmful to back away from existing trade policy?
 - c. In what way, if any, have Federal Government environmental and health and safety policies driven up costs? By how much? To what extent do you regard these policies as having produced compensating benefits for the public? What changes would you recommend, if any?
 - d. Do you presently experience, or do you foresee in the near future, physical shortages of production inputs? What, if any, steps should the Federal Government take to prevent these shortages from developing?
 - e. Are there demand-reducing or conservation measures which you think might have a significant effect on inflation? Some suggestions have included consumer-oriented conservation campaigns, regulation of allowable materials uses (e.g., prohibiting disposable metal beverage containers), excise taxes to discourage consumption, taxes and/or subsidies to encourage recycling, taxes and/or subsidies to promote less minerals-intensive technologies. Which of these or other measures do you think would be best from the point of view of reducing inflation in the minerals and materials sector? Which would be best from the point of view of the minerals and materials industry? Which would be best from the point of view of consumers or of long-term protection of the environment?
2. The price of forest products has increased dramatically. Exports benefit our balance of payments but could create some shortages if other constraints on home construction are overcome. Most of the questions under paragraph 1, above, are also relevant to this segment of our economy.

Additionally, if other factors allow for a considerable expansion of homebuilding, will sufficient materials be available at reasonable prices to accommodate this expansion; and, if not, what policies should be adopted to deal with this problem?

3. For FY 1976, should we continue to hold down the budget for minerals and materials programs in order to balance the budget or to create a surplus? If some modest budget increases over FY 1975 are possible, where do you think they should come from?
4. Are there particular hardships or inequities connected with the minerals and materials industry caused by inflation which should receive immediate attention by the Federal Government?



DEPARTMENT OF THE INTERIOR

Statement of Appropriations and Outlays
FY 1973, 1974, and 1975

(in thousands of dollars)

	<u>FY</u> <u>1973</u>	<u>FY</u> <u>1974</u>	<u>Est.</u> <u>1975</u>
<u>Bureau of Land Management</u>			
Appropriated.....	231,004	265,677	306,001
Budget Outlays.....	225,835	264,900	344,845
<u>Bureau of Outdoor Recreation</u>			
Appropriated	304,222	80,919	305,210
Budget Outlays	209,340	246,800	277,260
<u>Geological Survey</u>			
Appropriated	149,387	172,344	246,700
Budget Outlays	138,439	178,400	238,500
<u>Bureau of Mines</u>			
Appropriated	158,667	106,900	220,961
Budget Outlays	137,069	104,535	191,436
<u>Mining Enforcement and Safety</u>			
<u>Administration</u>			
Appropriated	--	59,040	67,913
Budget Outlays	--	55,265	73,207
<u>Office of Coal Research</u>			
Appropriated	46,961	133,400	274,278
Budget Outlays	36,505	60,700	207,000
<u>U.S. Fish and Wildlife Service</u>			
Appropriated	158,822	181,290	207,536
Budget Outlays	151,641	162,300	196,688
<u>National Park Service</u>			
Appropriated	238,075	300,720	335,448
Budget Outlays	208,925	249,800	332,943
<u>1/ Office of Water Research Technology</u>			
Appropriated	41,175	17,396	16,892
Budget Outlays	41,200	26,800	20,592

	<u>FY</u> <u>1973</u>	<u>FY</u> <u>1974</u>	<u>Est.</u> <u>1975</u>
<u>Bureau of Reclamation</u>			
Appropriated	525,220	435,616	512,761
Budget Outlays	446,724	450,800	527,066
<u>Bonneville Power Administration</u>			
Appropriated	146,246	140,133	188,000
Budget Outlays	135,234	154,100	166,009
<u>Southeastern Power Administration</u>			
Appropriated	941	924	946
Budget Outlays	922	800	946
<u>Southwestern Power Administration</u>			
Appropriated	7,233	5,752	6,415
Budget Outlays	5,639	4,371	6,536
<u>Alaska Power Administration</u>			
Appropriated	1,228	1,269	1,300
Budget Outlays	992	1,000	1,329
SUBTOTAL APPROPRIATED	2,009,181	1,901,380	2,690,361
SUBTOTAL BUDGET OUTLAYS	1,738,465	1,960,571	2,584,357
<u>Bureau of Indian Affairs</u>			
Appropriated	718,111	778,634	848,705
Budget Outlays	712,093	838,400	1,021,549
<u>Office of Territorial Affairs</u>			
Appropriated	103,978	97,506	103,075
Budget Outlays	105,116	103,100	116,275
<u>Office of the Solicitor</u>			
Appropriated	7,360	9,089	12,040
Budget Outlays	7,091	7,000	12,045
<u>2/ Office of the Secretary</u>			
Appropriated	21,308	34,884	65,567
Budget Outlays	19,340	28,700	95,415
SUBTOTAL APPROPRIATED	850,757	920,113	1,029,387
SUBTOTAL BUDGET OUTLAYS	843,640	977,200	1,245,284
TOTAL APPROPRIATED	<u>2,859,938</u>	<u>2,821,493</u>	<u>3,719,748</u>
TOTAL BUDGET OUTLAYS	<u>2,582,105</u>	<u>2,937,771</u>	<u>3,829,641</u>

1/ Effective July 26, 1974, the combined functions of the Office of Water Resources Research and the Office of Saline Water were assigned to the Office of Water Research and Technology.

2/ Includes Underground and other Electric Power Transmission Research. Includes \$40,700,000 Land Use Control and Mined Area Protection--proposed legislation.

QUESTIONS FOR DALLAS SUMMIT MEETING

COMMITTEE ON OIL & GAS

President Ford has identified inflation as the Nation's number one economic problem. The problem has been particularly burdensome in the area of oil and gas. The following questions are intended to elicit discussions as to steps that should be taken to moderate inflation and achieve other objectives in this sector:

1. What steps should the Federal Government take to encourage domestic conservation of oil and gas --
 - a. change regulations on natural gas?
 - b. change the old crude oil ceiling?
 - c. change environmental regulations?
 - d. change other regulations?
 - e. change taxes?
 - f. change budget?
2. What steps should State and local governments consider to conserve oil and gas usage?
3. What steps should consumers take to conserve oil and gas?
4. What steps should be taken to encourage additional supplies of oil and gas --
 - a. provide access to public lands (i.e. leasing policy in OCS frontier area)?
 - b. change regulations (similar to 1a, b, c, d and 2)?
 - c. change taxes?
 - d. increase readiness of strategic resources (e.g. Naval Petroleum Reserve No. 1)?
 - e. price support (i.e. for limited volume of oil from oil shale)?
 - f. additional or different composition of R&D to reduce costs of extracting and processing?
 - g. change export or import policies?
 - h. change structure of industry?
 - i. limitations on expansion of supply --
 - (1) skilled labor
 - (2) plant and equipment
 - (3) rigs tubing and other intermediate products
 - (4) others
5. What steps should be considered internationally to enhance conservation and provide reliable and low-cost supplies?
6. What is the proper balance among objectives --
 - a. environment?
 - b. production?
 - c. health and safety?
 - d. reduced dependence on unreliable and high-cost supplies?
 - e. consumer purchasing power?
 - f. profit motive (short-term level of industry profits)?
7. What should be the relative roles of the private producing sector, the consumer and various levels of Government?



Natural Resources and Recreation
Conference on Inflation
Dallas, Texas

Sunday, September 15

Begins at 5:00 pm Registration*

6:00 pm - 6:30 pm Reception*

6:30 pm Dinner*

8:00 pm Welcome, introduction of Congressional delegation
and special guests by Secretary Morton

 --Welcome remarks by Texas Delegate (5 minutes)

 --Congressional Statement (by one member of delegation
 chosen by them. Subject: Congress and the Economy
 with emphasis on Natural Resource Legislation)

 --Assignment of Working Groups:

 (a) Oil & Gas Group

 (b) Minerals & Materials Group

 (c) Coal & Electrical Generation Group

 (d) Recreation & Environment Group

 --Discussion topic suggestions presented to Working
 Groups**

Monday, September 16

9:00 am - 10:00 am --Report on the State of the Economy--Council of
 Economic Advisers

 --Report on the Federal Budget--Office of Management
 and Budget

10:00 am - 12:30 Working Group sessions (meeting separately)
 General discussion of issues related to Working
 Group categories

 Working Groups to prepare outline and talking points
 for presentation to the Plenary Session



12:30 pm	Lunch* (Unstructured; but space available for Working Groups to continue discussions over lunch.)
2:00 pm	Plenary Session
	45 minute presentation and discussion by: Oil & Gas Group Recreation & Environment Group
3:30 pm	Break
3:45 pm	45 minute presentation and discussion by: Minerals & Materials Group Coal & Electrical Generation Group
5:15 pm	Summary and remarks by Secretary Morton
5:30 pm	Adjourn

* Cost covered by registration fee.

** Four or five discussion topics presented to each Working Group, based on fundamental questions in President's letter refined to deal with Working Group's particular segment of the economy.



QUESTIONS FOR DALLAS SUMMIT MEETING

Recreation Group

1. What impact has inflation had upon the recreation industry; does the impact vary with different sectors of the industry (i.e., outdoor recreation versus foreign travel)? What steps, if any, can the Federal Government take that will both combat inflation and assist the recreation industry?
2. Millions of Americans enjoy outdoor recreation in public and private facilities (i.e. federal and state parks, national forests, beaches, and private campgrounds). An increasing population creates pressures to create additional outdoor recreation facilities; but during a period of inflation the cost of such facilities are high. On the other hand, the availability of inexpensive recreation is even more important to consumers during an inflationary period than at times when they have more of their income available for recreation. What policies should the Federal Government follow regarding creation of new recreation facilities during the current period?
3. As recognized in the National Environmental Policy Act, our environment is an extremely important natural resource. Several laws and policies, in addition to NEPA, are designed to protect our air and water quality and our landscape; some are procedural, others are substantive. During the current period of short supply for some resources--particularly energy resources--several questions arise that cut across the entire range of issues related to natural resources and recreation:
 - a. In what way, if any, have the procedural requirements of our environmental laws (such as NEPA) contributed to inflation? To what extent? If so, should the procedures be changed?
 - b. What is the effect, if any, on our foreign trade of the cost elements associated with environmental protection in our production processes?
 - c. Do environmental standards (such as the Clean Air Act) contribute to inflation and, if so, to what degree? If so, should the standards be changed?
3. For FY 1976, should we continue to hold down the budget for recreation programs in order to balance the budget or to create a surplus? If some modest budget increases over FY 1975 are possible, where do you think they should come?
4. Are there particular hardships or inequities connected with the recreation industry caused by inflation which should receive immediate attention by the Federal Government?

