

CASES AND MATERIALS ON  
OIL AND GAS LAW  
Fifth Edition

John S. Lowe  
Owen L. Anderson  
Ernest E. Smith  
David E. Pierce

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# CASES AND MATERIALS ON OIL AND GAS LAW

## Fifth Edition

By

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Professors John Lowe, Owen Anderson, Ernest Smith, and David  
Pierce dedicate this work to their respective spouses who have  
unselfishly supported them in their academic careers:

Jacquelyn Lowe  
Kathie Anderson  
Paula Smith  
Martha Pierce

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## Preface

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Law is the long shadow of the people who serve it. There are few absolute rules. For virtually every common law principle, there is a rebuttal or a could-have-been. Ultimately, what becomes *the law* is shaped by the dedication, the skill and the logic of the advocates, jurists and commentators who participate in the legal process.

Eugene Kuntz, who led us in the preparation of the first two editions of this book, and whose influence remains strong in this edition, cast a long shadow on oil and gas law. His work as a teacher, as a commentator and—on occasion—as an advocate, had a profound effect upon the development of oil and gas law in the second half of the Twentieth Century. Many of the concepts that we consider in this book, including the accommodation doctrine applied in surface use disputes, the meaning of “minerals,” and the “marketable product” rule of royalty valuation, come from his work. Indeed, Gene Kuntz may have influenced the development of modern oil and gas law more than any other single individual.

We miss Gene, but we were blessed by his friendship and counsel over the years, and we believe that he would have been pleased with this fifth edition of *Cases and Materials on Oil and Gas Law*. Its pages are filled with theoretical enigmas that intrigue legal theorists, yet oil and gas law is practical enough to satisfy the desire for “real law” shared by most second- and third-year law students. Students enjoy the course in large part because it is about the law governing an industry. An industry pioneered and developed by some of the greatest entrepreneurs of all time. It provides students with an opportunity to observe the many ways an industry is impacted by the law. Students will gain a better understanding of property, contract, and tort law as they analyze how courts struggle to apply common law concepts to a new and evolving industry with its own unique physical and practical limitations. Students will also evaluate the federal, state, and local regulatory regimes that have evolved to address perceived failings of the common law.

In this fifth edition, ownership materials previously contained in Chapter 4 have been consolidated with the basic ownership materials in Chapter 1. Conservation materials previously in Chapter 1 have been moved to Chapter 2 and consolidated with the pooling and unitization materials previously contained in Chapter 6.

This casebook addresses the law of oil and gas first by focusing on ownership of the resource. Chapter 1 examines the common law of oil and gas ownership and Chapter 2 explores the various legislative responses to problems created by common law ownership concepts. Chapter 3 focuses on the foundational business relationship used to develop oil and gas in the United States: the oil and gas “lease.” Once students have

studied ownership concepts and the oil and gas lease, Chapter 4 examines common problems encountered when interpreting oil and gas conveyances. Chapter 5 focuses on the other types of relationships frequently encountered in the industry, such as assignments, farmouts, operating agreements, drilling contracts, and gas sales contracts. Chapter 6 examines in depth the complex body of law that must be considered when oil and gas development is taking place on property owned by a state, federal, or tribal government. Chapter 7 follows the oil and gas development process chronologically, from land acquisition to abandonment, and examines the body of law designed to regulate the environmental impacts associated with oil and gas development. Most professors will structure the basic oil and gas law course around Chapters 1 through 4 and save Chapters 5 through 7 for advanced study.

In preparing a casebook to assist in the study of oil and gas law, we do not labor alone. We continue to be indebted to those who have taught oil and gas law in the past, including especially the late Professors A. W. Walker, Jr., Marion K. Woodard, and William O. Huie, whose casebook preceded ours and from whose analyses we drew in preparing the first edition. We are also indebted to the late Professor Victor H. Kulp, Professor Kuntz's predecessor at the University of Oklahoma and author of West's first oil and gas law casebook in 1924.

We have also drawn on the analyses of many law professors and lawyers. While we hesitate to list these names for fear of overlooking someone, the list certainly includes Professors Robert E. Beck, Laura H. Burney, Gary B. Conine, Harriet S. Daggett, John S. Dzienkowski, William J. Flittie, Richard W. Hemingway, Bruce M. Kramer, Marla E. Mansfield, Patrick H. Martin, Jr., Clyde O. Martz, Wilmer D. Masterson, Jr., Richard C. Maxwell, Maurice Merrill, Charles Meyers, Joshua M. Morse, Phillip E. Norvell, Robert J. Peroni, Joseph Shade, Marc I. Steinberg, Rennard J. Strickland, Robert Sullivan, W. L. Summers, Jacqueline Lang Weaver, and Howard R. Williams, as well as many others who have authored articles and commentaries in a variety of publications cited throughout this book.

The editors thank those who provided research and assistance in the preparation of the manuscript for the Fifth edition. Professor Lowe appreciates the work of his research assistant, Ashley Wells Songer, as well as that of Underwood Law Library's Associate Director, Kurt Adamson and IT Specialist Debbie Seiter. Professor Lowe also thanks John B. Attansio, Dean of the Dedman School of Law at Southern Methodist University, and William L. Hutchison and the Hutchison Endowment, for their moral and financial support of his work on this project.

Professor Anderson thanks Andrew M. Coats, Dean of The University of Oklahoma College of Law, for his encouragement and the many friends of Eugene Kuntz for the support provided by the Eugene Kuntz Chair in Oil, Gas and Natural Resources. Professor Anderson also thanks research assistants Reagan Bradford, Rachel Kirk, and Ivan London.

Professors Lowe and Anderson express their appreciation to the faculty and staff of the University of Dundee's Centre for Energy, Petroleum & Mineral Law & Policy and to the University of Melbourne's Faculty of Law for the international perspectives that teaching at those institutions have given them.

Professor Smith is indebted to the late Rex G. Baker, his son, Rex G. Baker, Jr., and his grandson, Rex G. Baker III, for the support provided by the Rex G. Baker Centennial Chair in Natural Resources Law. He also thanks Dean Lawrence G. Sager of The University of Texas School of Law, his many and able research assistants, Debbie Steed, his administrative assistant for many years who provided invaluable assistance in the preparation of the manuscripts for the first four editions, and his current administrative assistant, Renee Loyless-May, for her help with the 5th edition.

Professor Pierce thanks Thomas J. Romig, Dean of Washburn University School of Law, for his support of this project, and extends a special thanks to Angela Y. Carlon, research assistant and second-year law student at Washburn, for her assistance in updating citations and proofreading the manuscript.

We have adopted a number of conventions in the preparation of these materials. We have frequently omitted citations from cases and other quotations without inserting ellipses. Because oil and gas law is largely a matter of state law, we have modified the usual form for citation of federal cases that apply state law by including the state from which the case arose. The names of frequently cited treatises are abbreviated in accordance with the "Citation Abbreviations" page that follows this Preface. All footnotes are consecutively numbered within each chapter.

JOHN S. LOWE  
OWEN L. ANDERSON  
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November 2007

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## Citation Abbreviations

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Throughout this casebook the following citation abbreviations have been used:

- Brown: Earl A. Brown, *The Law of Oil and Gas Leases* (Update Editors: Earl A. Brown, Jr. & Lawrence T. Gillaspia) (Matthew Bender & Co. 2d ed. 2006).
- Forms Manual: John S. Lowe, Owen A. Anderson, Ernest E. Smith, David E. Pierce, *Forms Manual to Accompany Cases and Materials on Oil and Gas Law* (Thomson/West 4th ed. 2004).
- Hemingway: Owen L. Anderson, John S. Dzienkowski, John S. Lowe, Robert J. Peroni, David E. Pierce, and Ernest E. Smith, *Hemingway Oil and Gas Law and Taxation* (West 4th ed. 2004).
- Kramer & Martin: Bruce M. Kramer & Patrick H. Martin, *The Law of Pooling and Unitization* (Matthew Bender & Co. 3d ed. 2006).
- Kuntz: Eugene Kuntz, *Oil and Gas Law* (Update Editors: Owen L. Anderson, John S. Lowe, Ernest E. Smith, David E. Pierce) (Anderson 1987–2001 and Matthew Bender & Co. 2007).
- Lowe: John S. Lowe, *Oil and Gas Law in a Nutshell* (West 4th ed. 2003).
- Manual of Terms: Howard R. Williams and Charles J. Meyers, *Williams & Meyers Manual of Oil and Gas Terms* (Update Editors: Bruce M. Kramer & Patrick H. Martin) (Matthew Bender & Co. 13th ed. 2006).
- Merrill: Maurice H. Merrill, *The Law Relating to Covenants Implied in Oil and Gas Leases* (Thomas Law Book Co. 2d ed. 1940).
- O&GR: Oil and Gas Reporter (Bruce M. Kramer, Administrative Editor) (Matthew Bender 1952–2007) (specific Discussion Notes author identified by last name).

**CITATION ABBREVIATIONS**

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- Pierce: Kansas Oil and Gas Handbook (Kansas Bar Association 1986).
- Smith: Ernest E. Smith, John S. Dzienkowski, Owen L. Anderson, Garry B. Conine, John S. Lowe, and Bruce M. Kramer, International Petroleum Transactions (Rocky Mtn. Min. L. Found. 2 ed. 2000).
- Smith & Weaver: Ernest E. Smith and Jacqueline L. Weaver, Texas Oil and Gas Law (Matthew Bender & Co. 2d ed. 2006).
- Sullivan: Robert E. Sullivan, Handbook of Oil and Gas Law (Prentice Hall, Inc. 1955).
- Summers: W. L. Summers, The Law of Oil and Gas (Update Editor: John S. Lowe) (Vernon 1954 and Thomson 2007).
- Williams & Meyers: Howard R. Williams and Charles J. Meyers, Williams & Meyers Oil and Gas Law (Update Editors: Bruce M. Kramer & Patrick H. Martin) (Matthew Bender & Co. 2006).

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