

Framing the Issues: Natural Gas and Electric System Interdependencies

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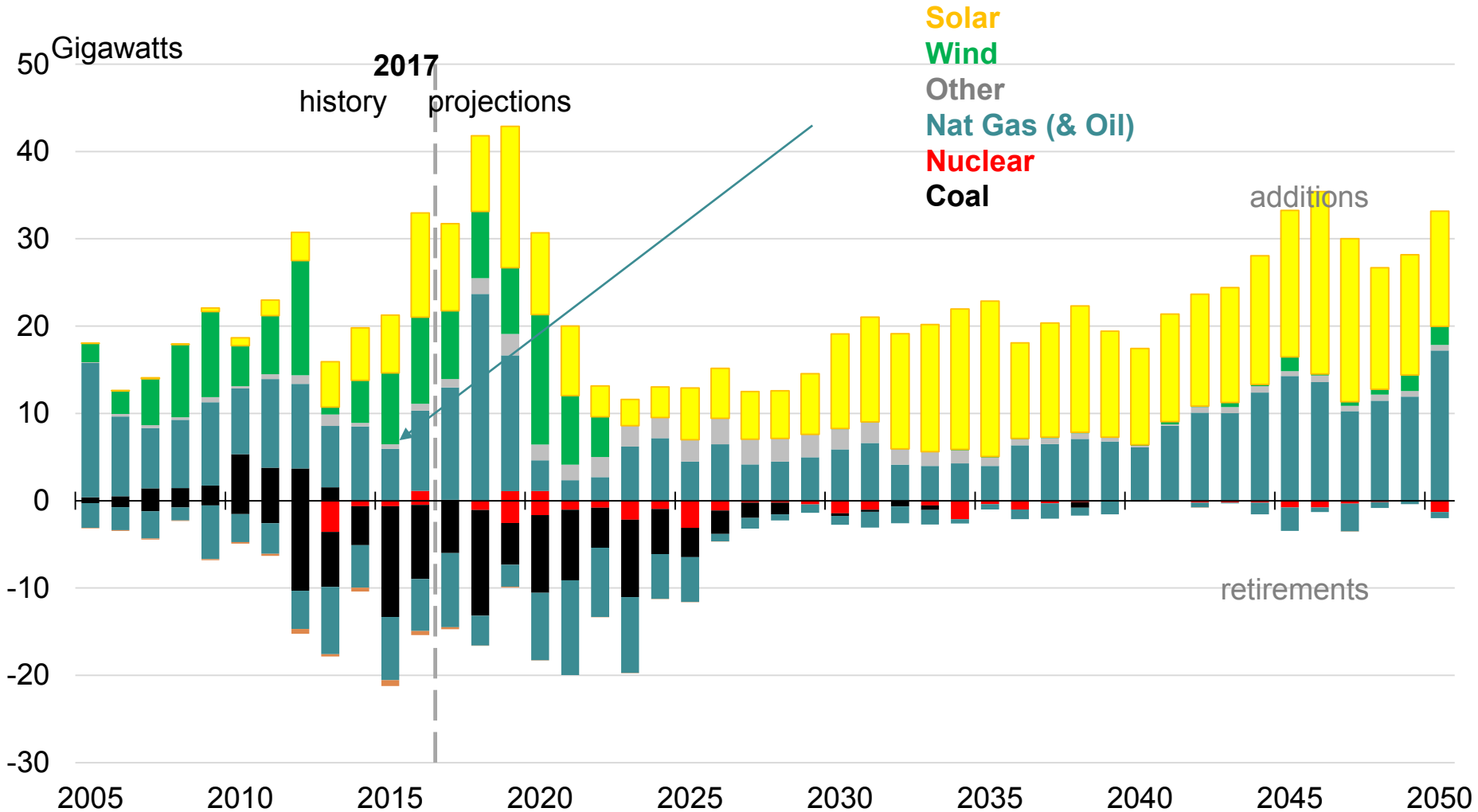


Conventional wisdom

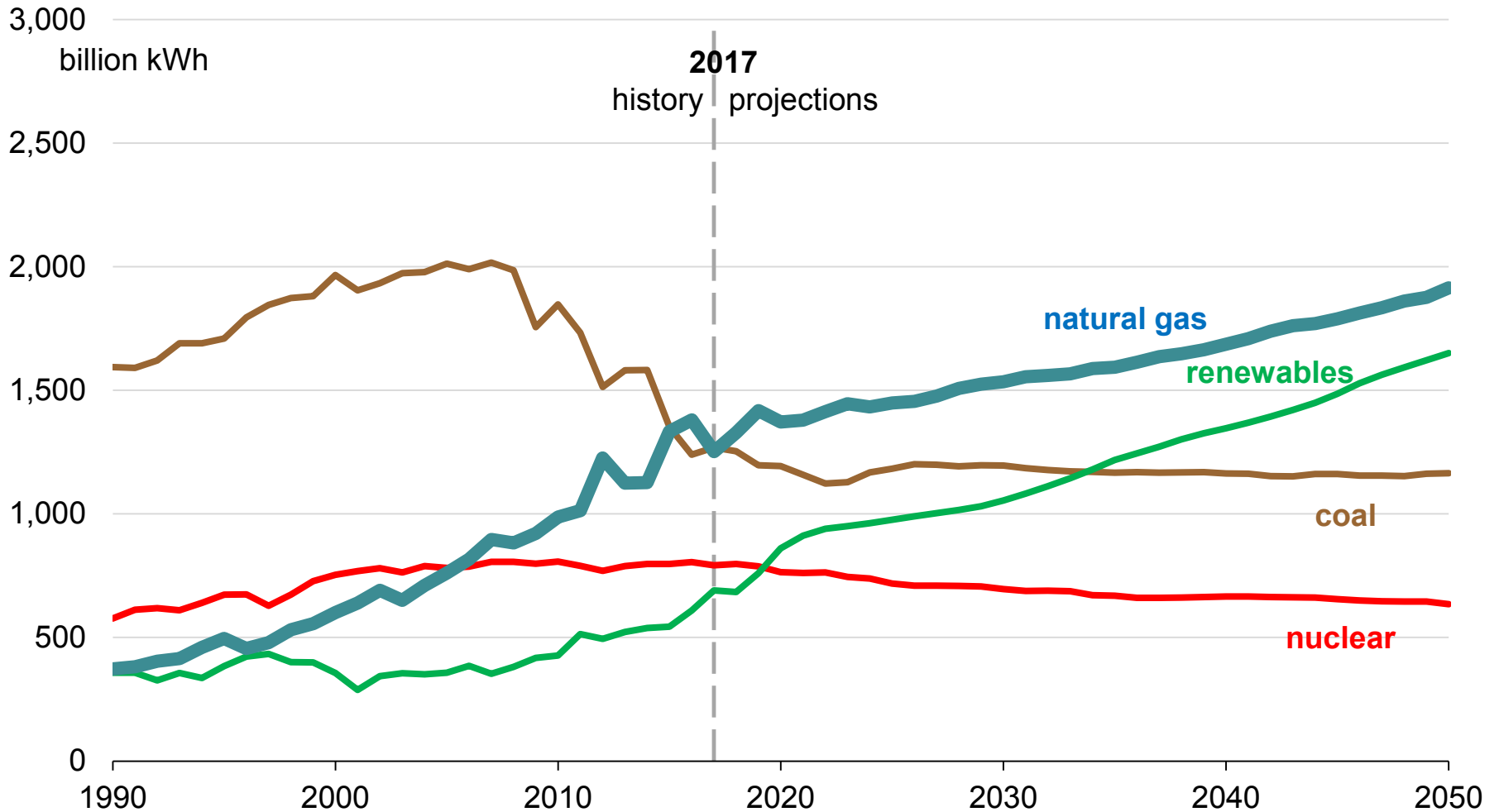
At least in the near term, the U.S. natural and electric industries are and will continue to be highly interdependent:

- **The electric industry will become even more dependent upon natural gas than it has been in the past**

Generating capacity additions by fuel type (2005-2050) (EIA AEO 2018)



Electric generation by fuel (1990-2050) (EIA AEO 2018)



Conventional wisdom

At least in the near term, the U.S. natural gas and electric industry are and will continue to be highly interdependent:

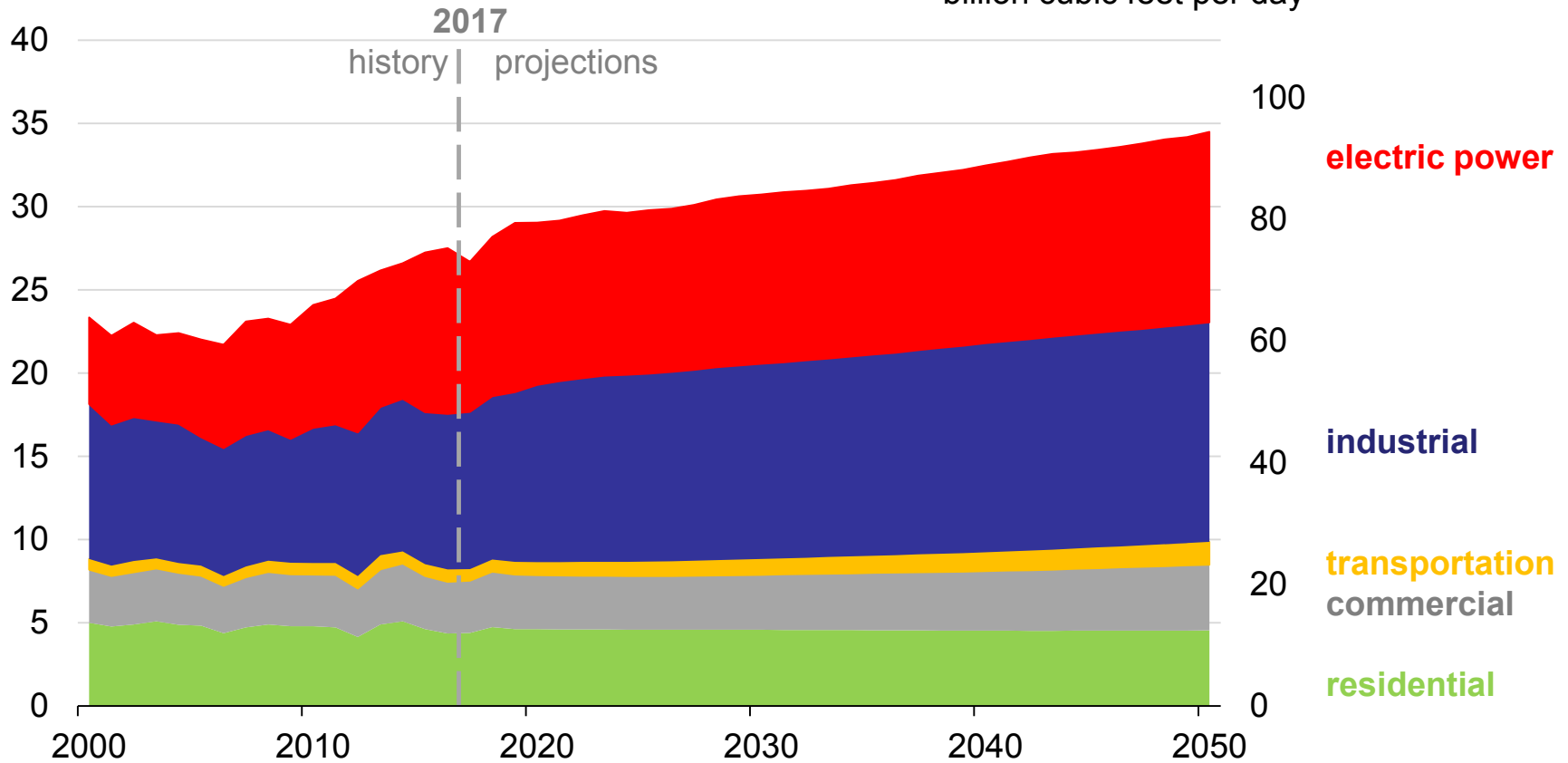
- The electric industry will become even more dependent upon natural gas than it has been in the past
- **The natural gas industry will rely on power sector demand for a growing and important share of its market for some years to come**

Natural gas: Estimated consumption by sector (EIA AEO 2018)

Natural gas consumption by sector

trillion cubic feet

billion cubic feet per day



Panelists on gas/electric issues

- **Arnie Quinn (Federal Energy Regulatory Commission)**
- **Thomas Coleman (North American Electric Reliability Corp)**
- **Greg Stark (National Renewable Energy Lab/JISEA)**