



Framing the Issues: Natural Gas and Electric System Interdependencies

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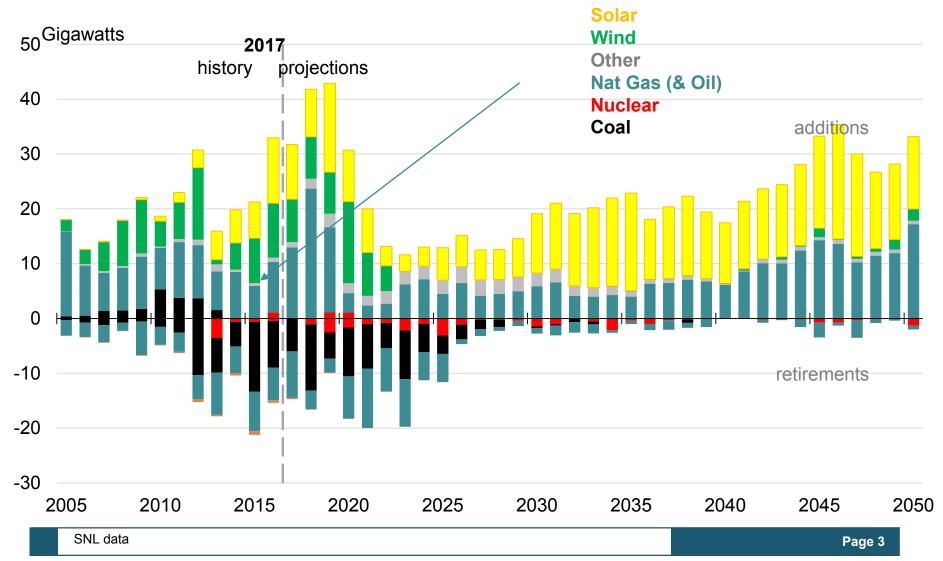
Conventional wisdom

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

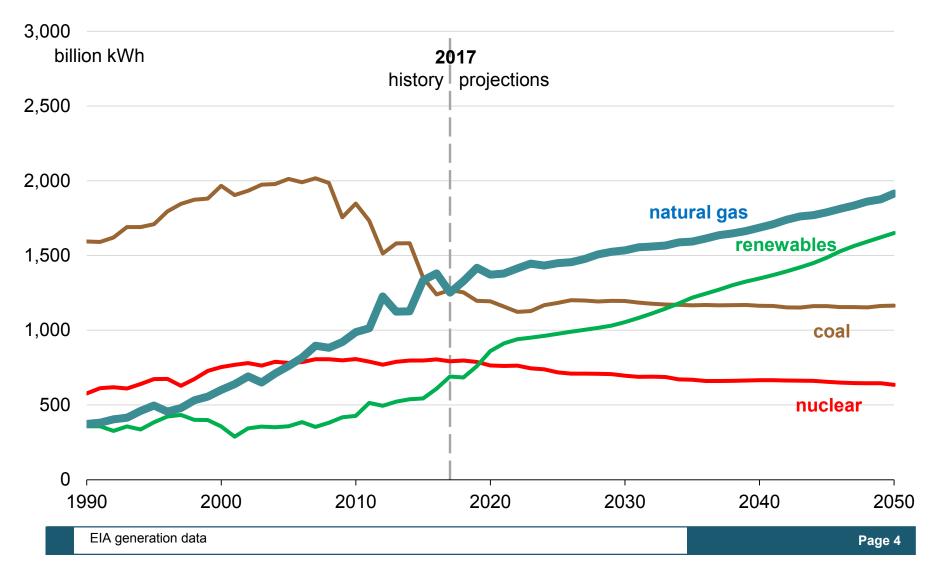


Generating capacity additions by fuel type (2005-2050) (EIA AEO 2018)





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





Conventional wisdom

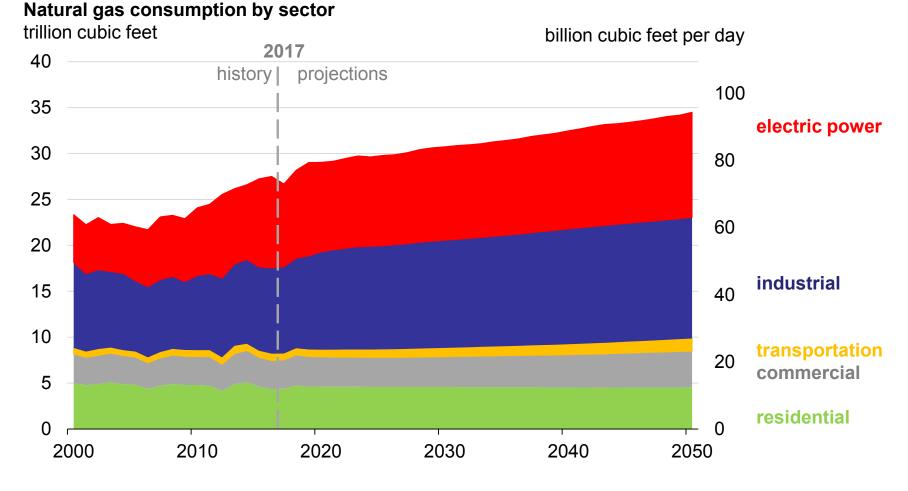
At least in the near term, the U.S. natural gas and electric industry are and will continue to be highly interdependent:

- 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)





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)