

A View From the Beltway
Maine Natural Gas Conference
October 9, 2014
Falmouth, Maine

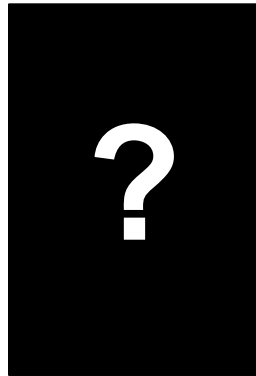


Jeff C. Wright, Director

OFFICE OF ENERGY PROJECTS

FEDERAL ENERGY REGULATORY COMMISSION

FERC's Organizational Structure



Office of Administrative
Law Judges
and Dispute Resolution

Office of the
Executive Director

Office of
External Affairs

Office of
Administrative
Litigation

Office of the
Secretary

Office of the
General Counsel

Office of
Enforcement

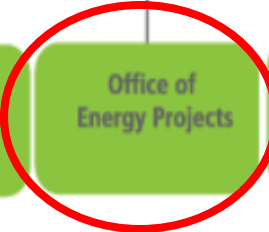
Office of Energy
Market Regulation

Office of
Energy Policy and
Innovation

Office of
Energy Projects

Office of
Electric Reliability

Office of
Energy Infrastructure
Security



Natural Gas Act

➔ Section 1

⇒ Non-jurisdictional

➔ Section 3

⇒ Imports/Exports...Pipes and LNG

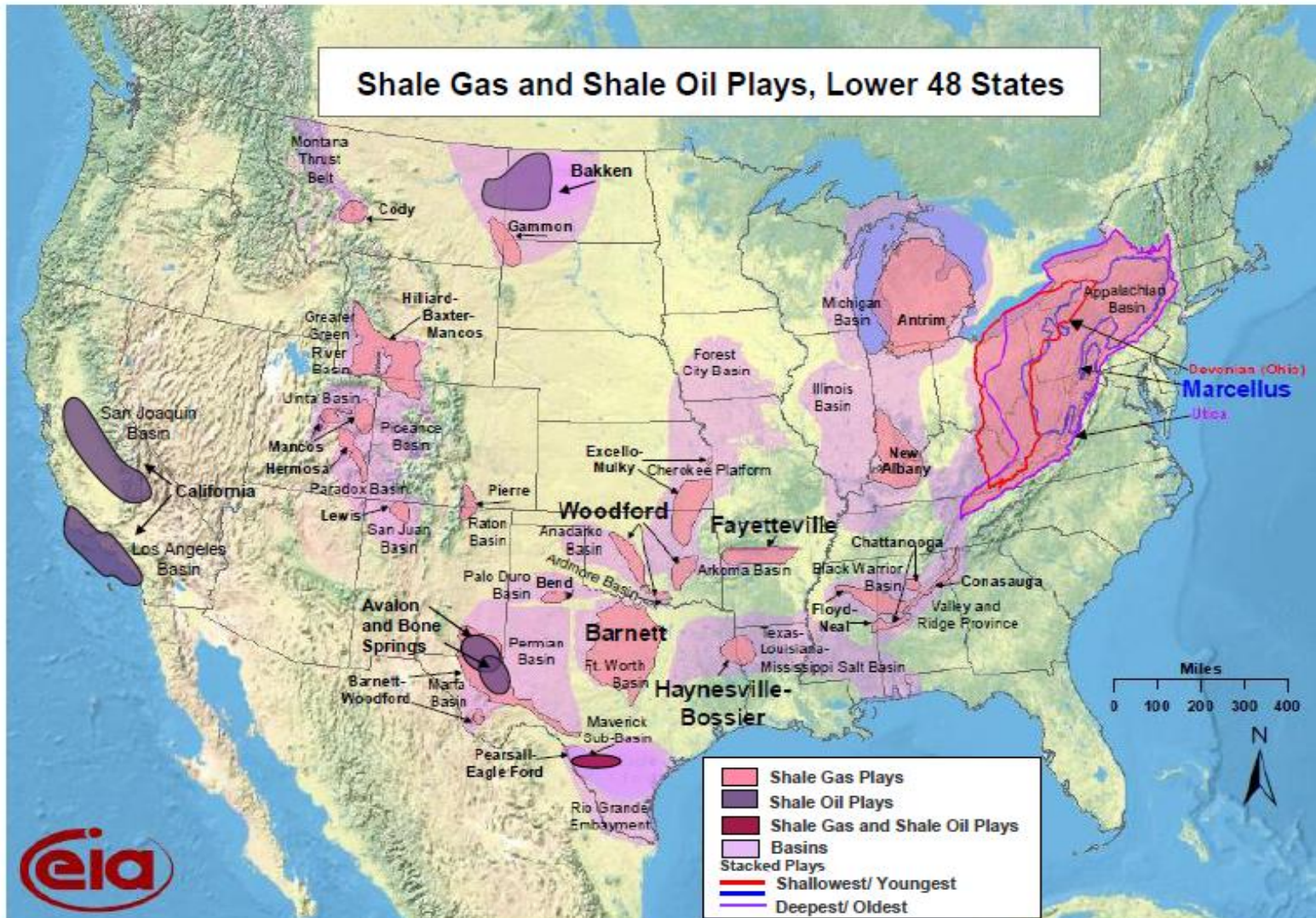
➔ Section 7

⇒ Siting...Pipes and Storage

Project Review Process

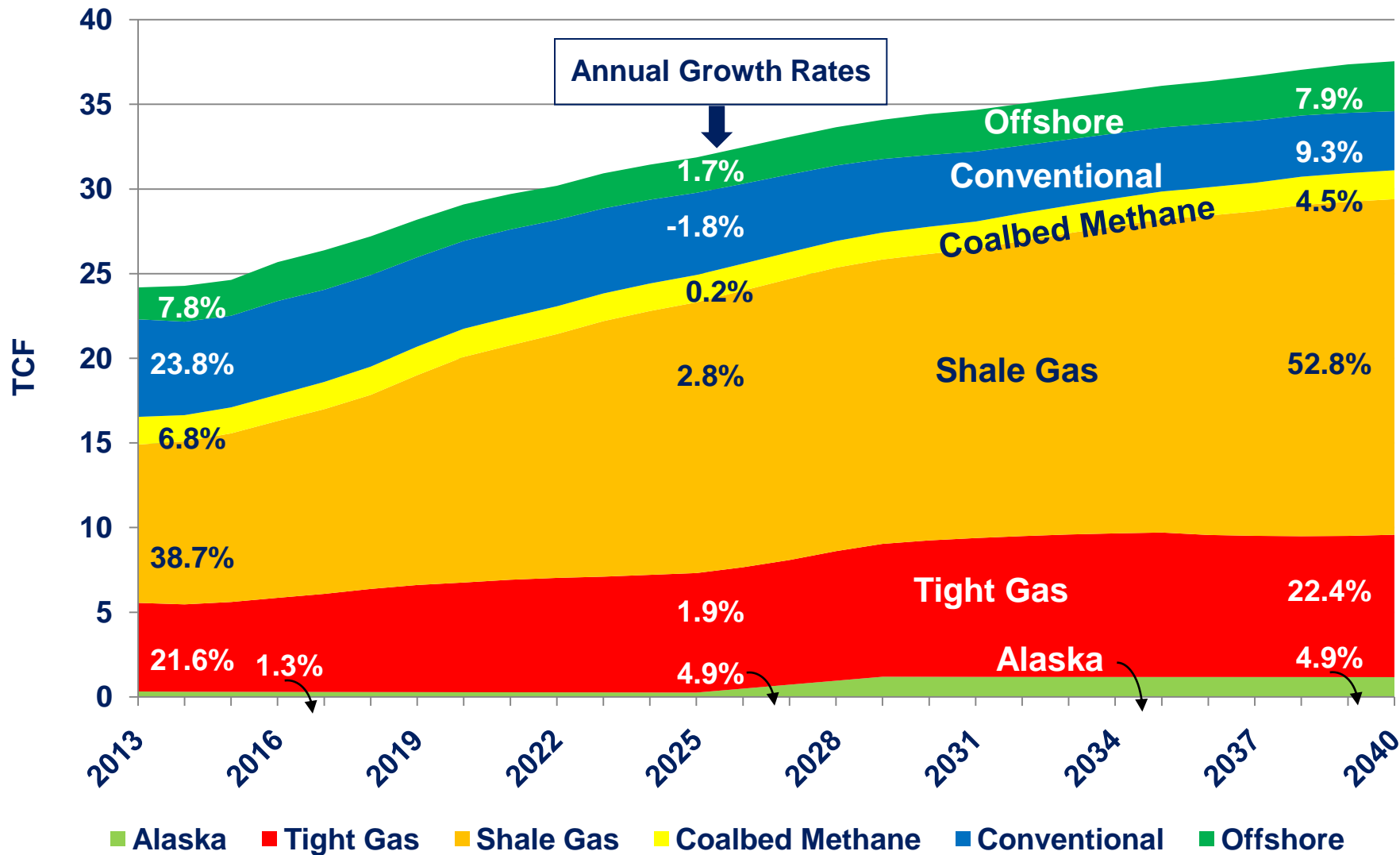
- ⇒ Project Preparation
- ⇒ Pre-filing
- ⇒ Application Review
- ⇒ Post-authorization

Shale Gas and Shale Oil Plays Lower 48 States

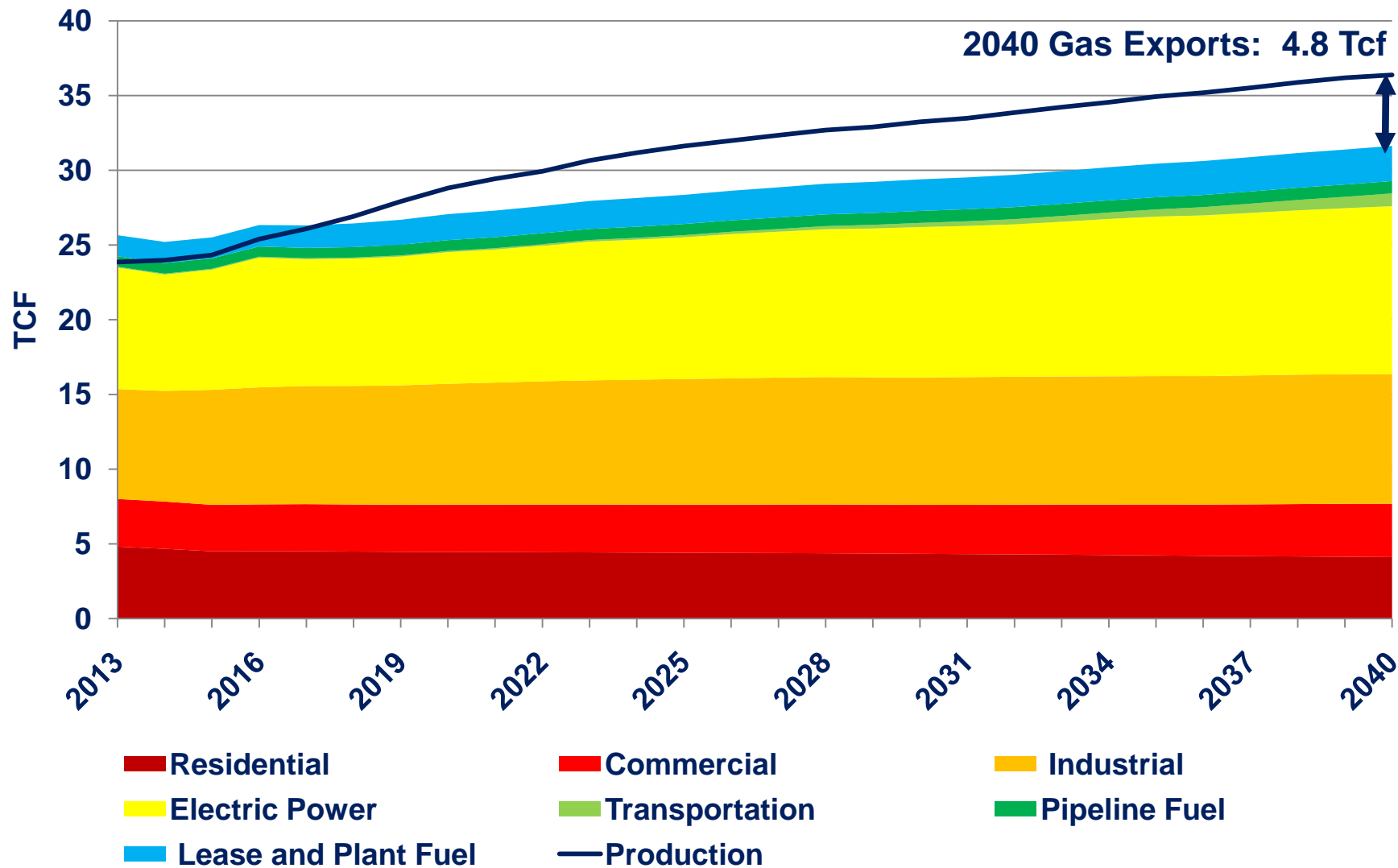


Source: EIA's Review of Emerging Resources: U.S. Shale Gas and Shale Oil Plays July 2011

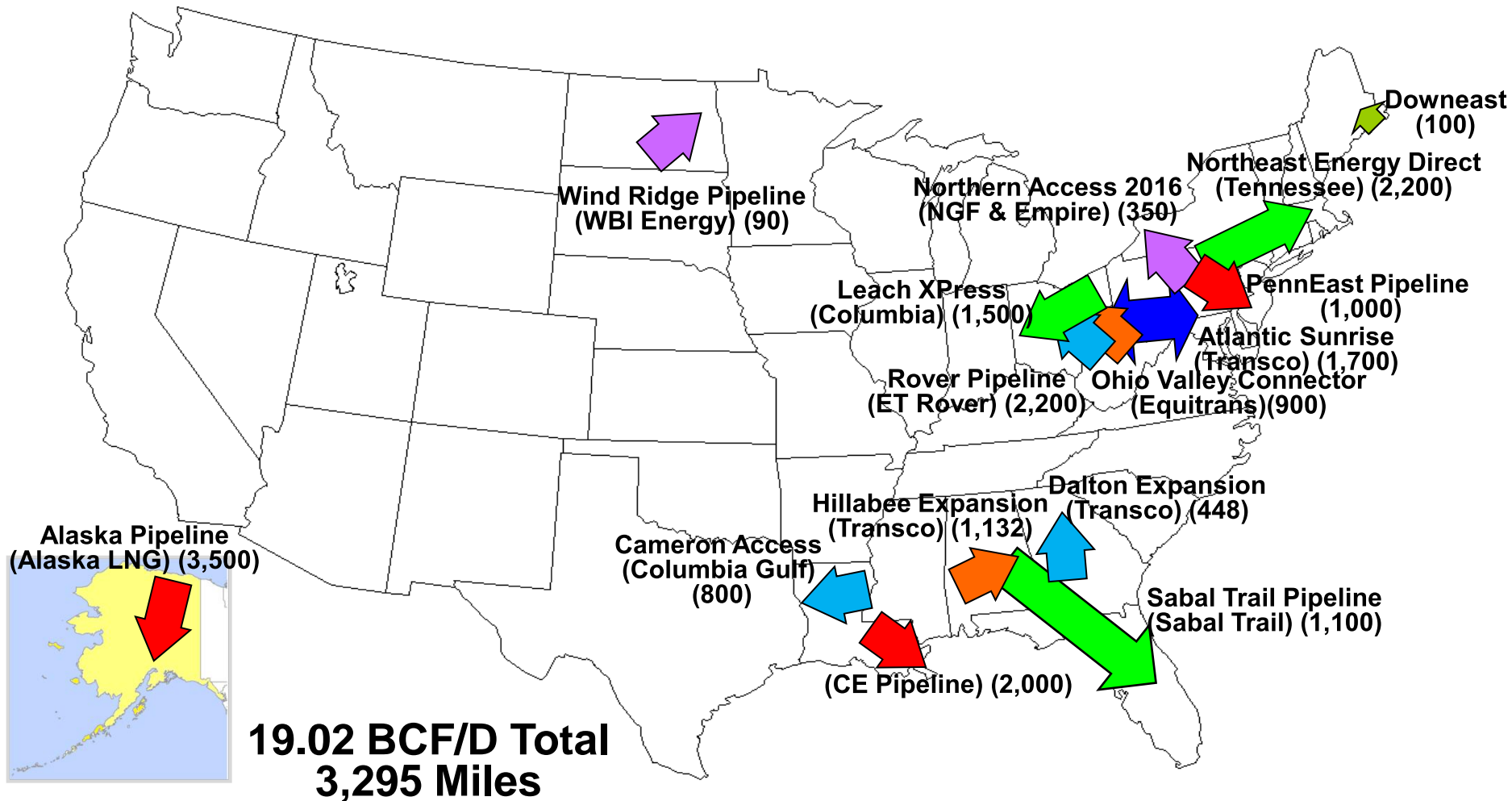
U.S. Gas Supply 2014 Outlook



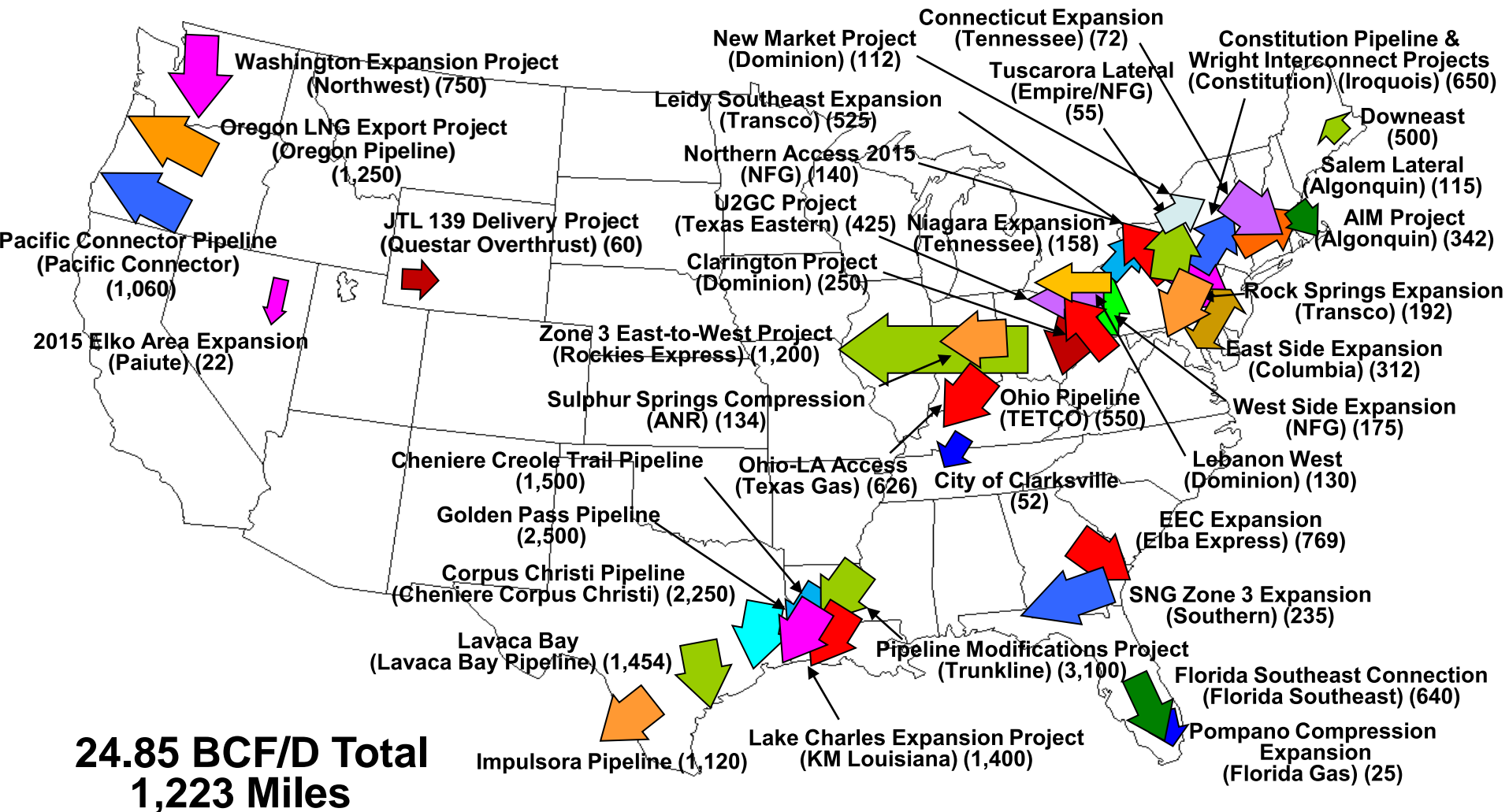
Gas Supply v. Gas Demand



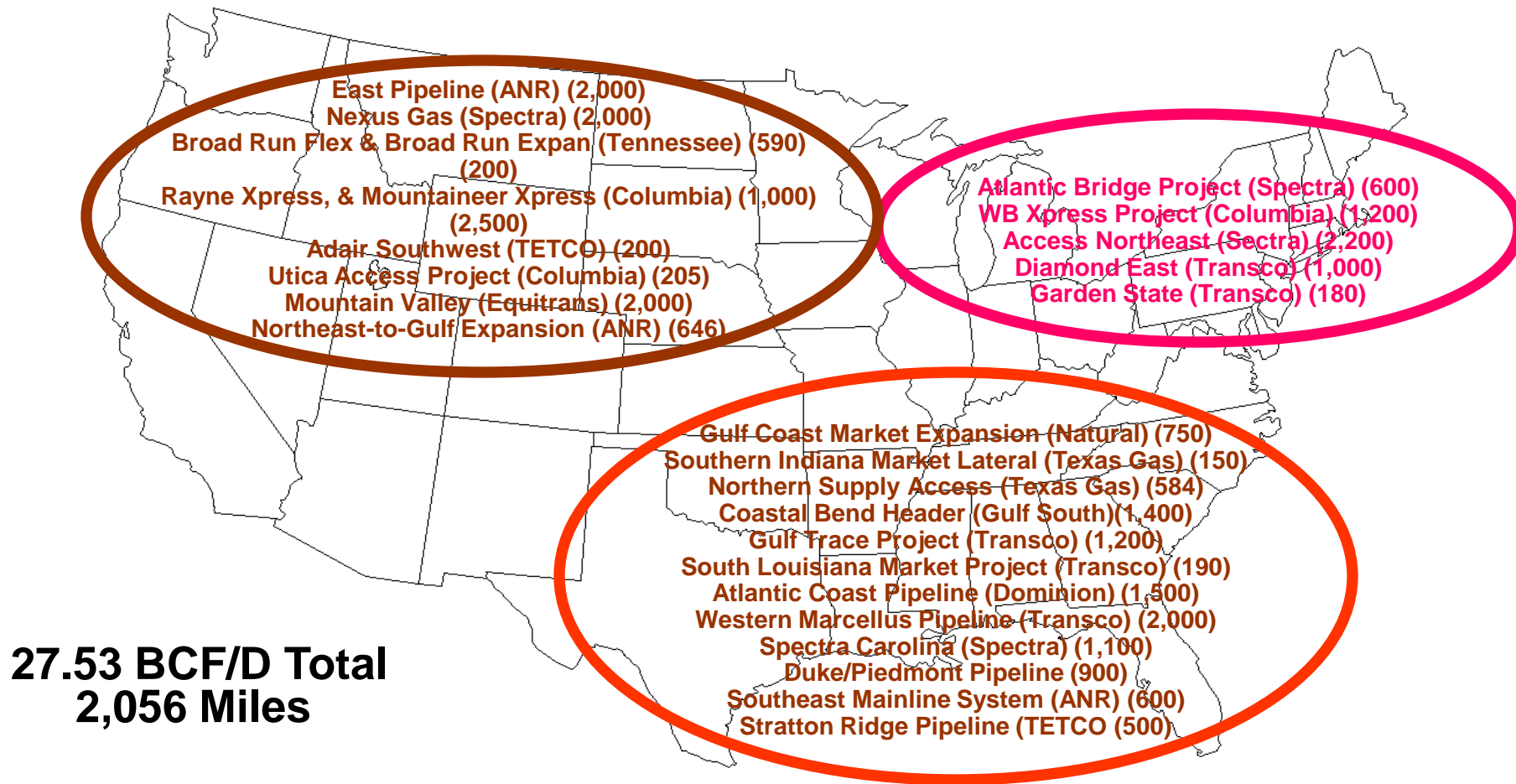
Pipeline Projects Pre-Filing (MMcf/d)



Pipeline Projects Pending (MMcf/d)

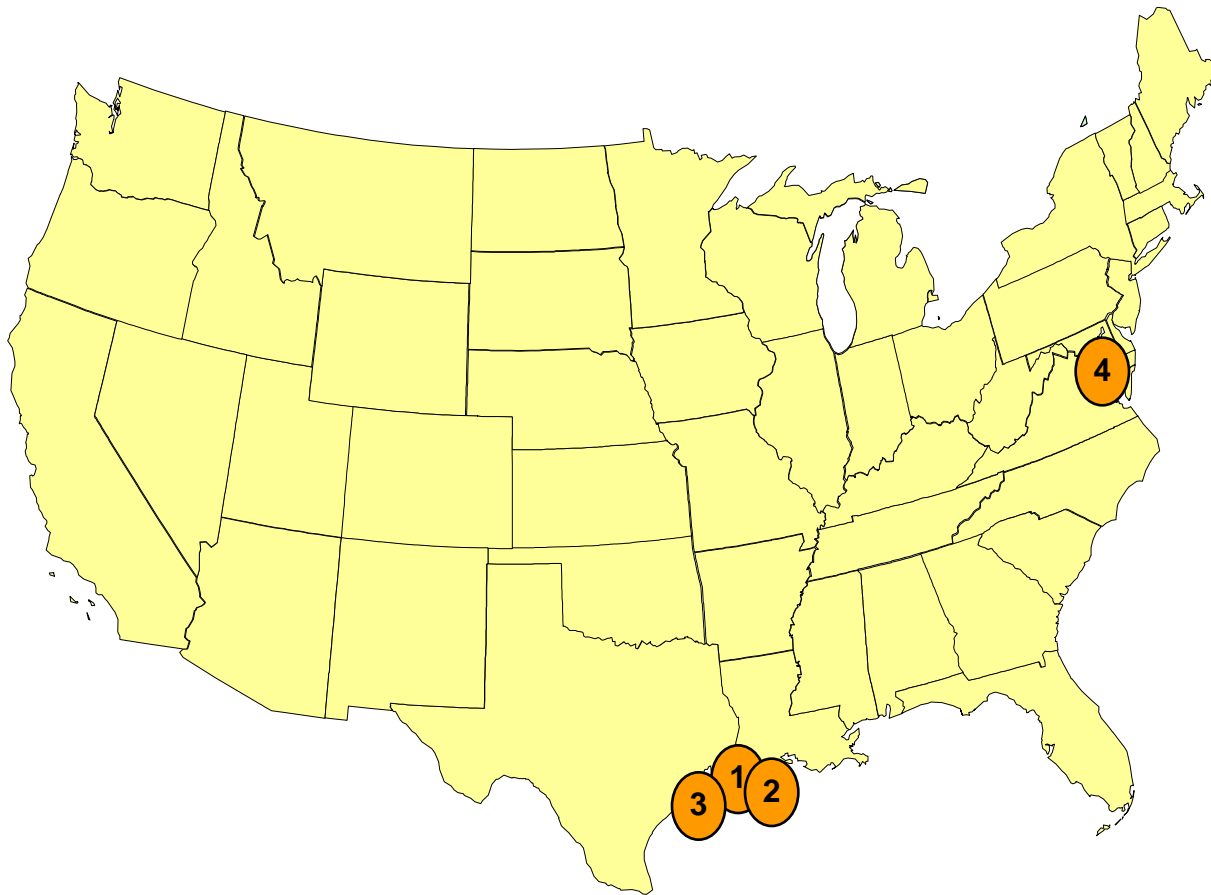


Major Pipeline Projects On The Horizon (MMcf/d)



U.S. LNG Export Terminals

Approved



APPROVED - UNDER CONSTRUCTION

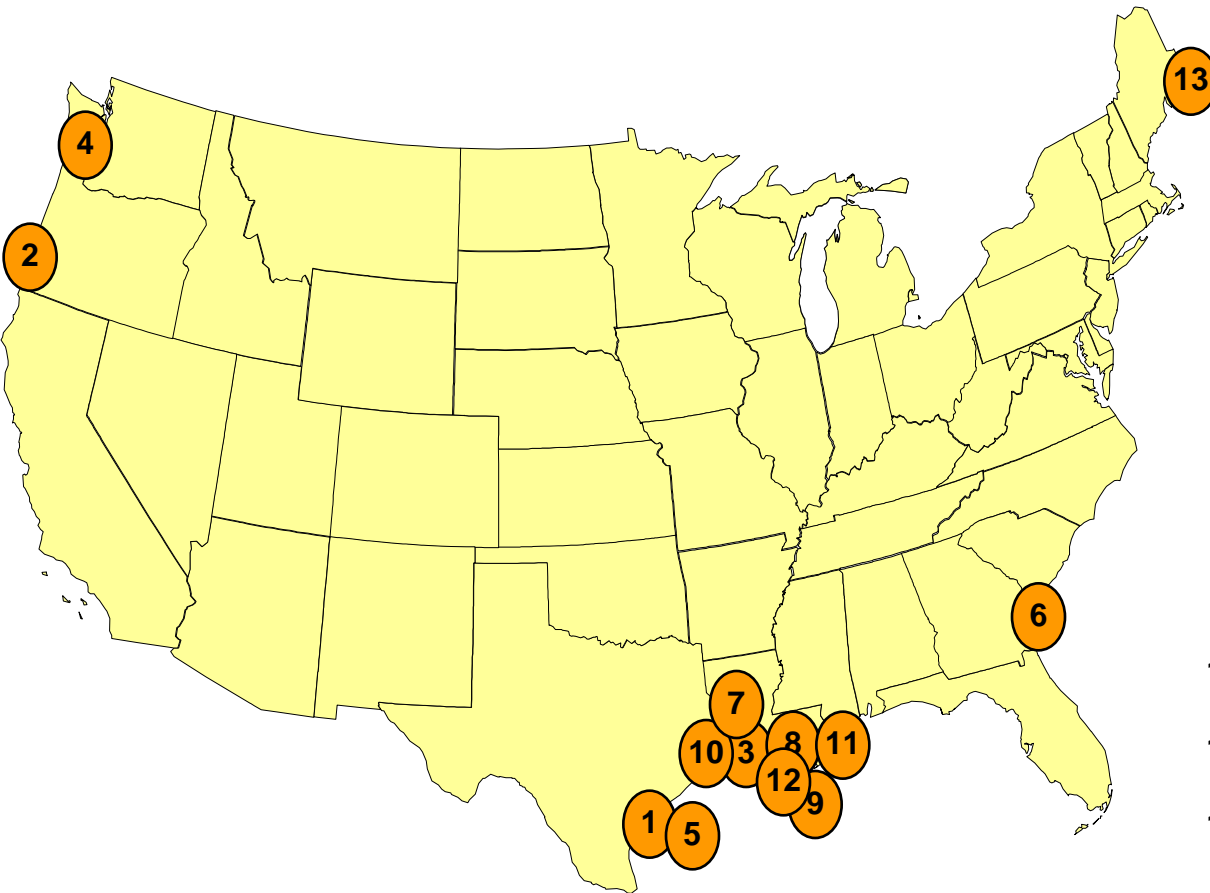
1. **Sabine, LA:** 2.76 Bcfd (Cheniere/Sabine Pass LNG)(CP11-72 & CP14-12)

APPROVED – NOT UNDER CONSTRUCTION

2. **Hackberry, LA:** 1.7 Bcfd (Sempra – Cameron LNG)(CP13-25)
3. **Freeport, TX:** 1.8 Bcfd (Freeport LNG Dev/Freeport LNG Expansion/FLNG Liquefaction)(CP12-509)
4. **Cove Point, MD:** 0.82 Bcfd (Dominion – Cove Point LNG)(CP13-113)

U.S. LNG Export Terminals

Proposed

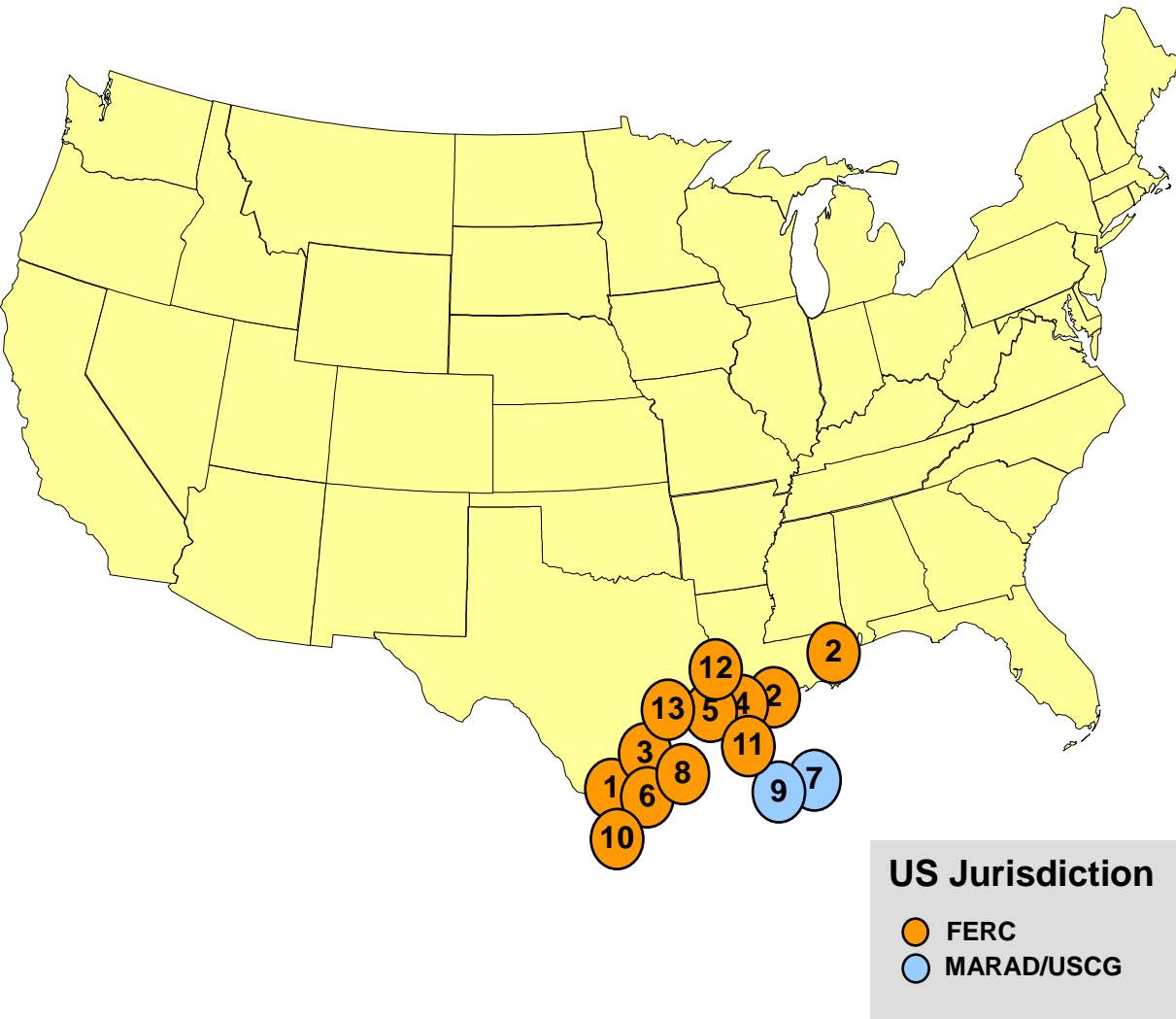


1. **Corpus Christi, TX:** 2.1 Bcfd (Cheniere – Corpus Christi LNG)(CP12-507)
2. **Coos Bay, OR:** 0.9 Bcfd (Jordan Cove Energy Project)(CP13-483)
3. **Lake Charles, LA:** 2.2 Bcfd (Southern Union - Trunkline LNG)(CP14-120)
4. **Astoria, OR:** 1.25 Bcfd (Oregon LNG) (CP09-6)
5. **Lavaca Bay, TX:** 1.38 Bcfd (Excelerate Liquefaction)(CP14-71 & 72)
6. **Elba Island, GA:** 0.35 Bcfd (Southern LNG Company)(CP14-103)
7. **Sabine Pass, LA:** 1.40 Bcfd (Sabine Pass Liquefaction)(CP13-552)
8. **Lake Charles, LA:** 1.07 Bcfd (Magnolia LNG) (CP14-347)
9. **Plaquemines Parish, LA:** 1.07 Bcfd (CE FLNG) (PF13-11)
10. **Sabine Pass, TX:** 2.1 Bcfd (ExxonMobil – Golden Pass)(CP14-517)
11. **Pascagoula, MS:** 1.5 Bcfd (Gulf LNG Liquefaction) (PF13-4)
12. **Plaquemines Parish, LA:** 0.30 Bcfd (Louisiana LNG) (PF14-17)
13. **Robbinston, ME:** 0.45 Bcfd (Kestrel Energy – Downeast LNG) (PF14-19)

U.S. LNG Export Terminals Potential

POTENTIAL U.S. SITES IDENTIFIED BY PROJECT SPONSORS

1. **Brownsville, TX:** 2.8 Bcfd (Gulf Coast LNG Export)
2. **Cameron Parish, LA:** 0.16 Bcfd (Waller LNG Services)
3. **Ingleside, TX:** 1.09 Bcfd (Pangea LNG (North America))
4. **Cameron Parish, LA:** 0.20 Bcfd (Gasfin Development)
5. **Cameron Parish, LA:** 1.34 Bcfd (Venture Global)
6. **Brownsville, TX:** 3.2 Bcfd (Eos LNG & Barca LNG)
7. **Gulf of Mexico:** 3.22 Bcfd (Main Pass - Freeport-McMoRan)
8. **Brownsville, TX:** 0.94 Bcfd (Annova LNG)
9. **Gulf of Mexico:** 1.8 Bcfd (Delfin LNG)
10. **Brownsville, TX:** 0.27 Bcfd (Texas LNG)
11. **Cameron Parish, LA:** 1.6 Bcfd (SCT&E LNG)
12. **Port Arthur, TX:** 0.2 Bcfd (WesPac/Gulfgate Terminal)
13. **Galveston, TX:** 0.77 Bcfd (Next Decade)



Problems on the Horizon?

- Stakeholder Opposition to Infrastructure
 - ⇒ Landowners
 - ⇒ Non-governmental Organizations
- Politics
 - ⇒ Legislation
 - ⇒ Who's In Charge?
- Getting Infrastructure Where It's Needed

Questions?