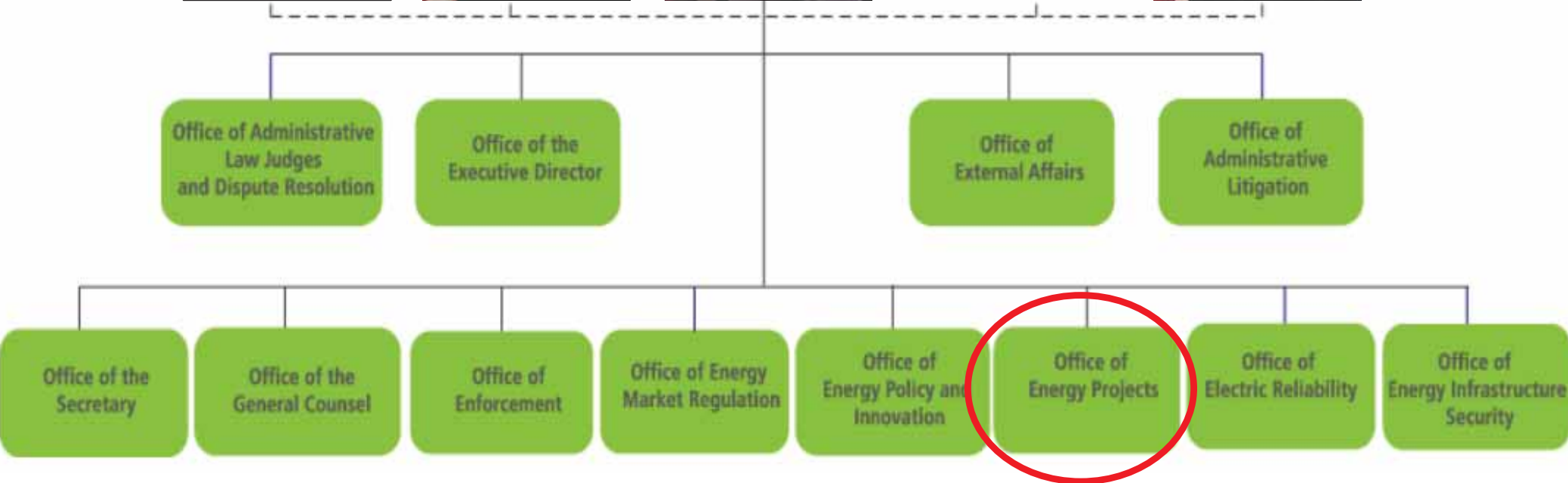
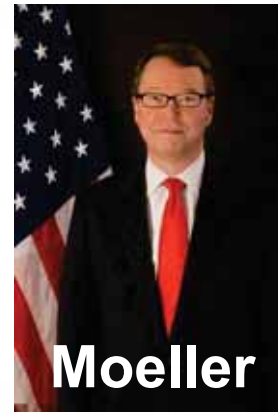


*A View From the Beltway*  
Maine Natural Gas Conference  
October 9, 2014  
Falmouth, Maine



**Jeff C. Wright, Director**  
OFFICE OF ENERGY PROJECTS  
FEDERAL ENERGY REGULATORY COMMISSION

# FERC's Organizational Structure



# Natural Gas Act

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## ⇒ Section 1

⇒ Non-jurisdictional

## ⇒ Section 3

⇒ Imports/Exports...Pipes and LNG

## ⇒ Section 7

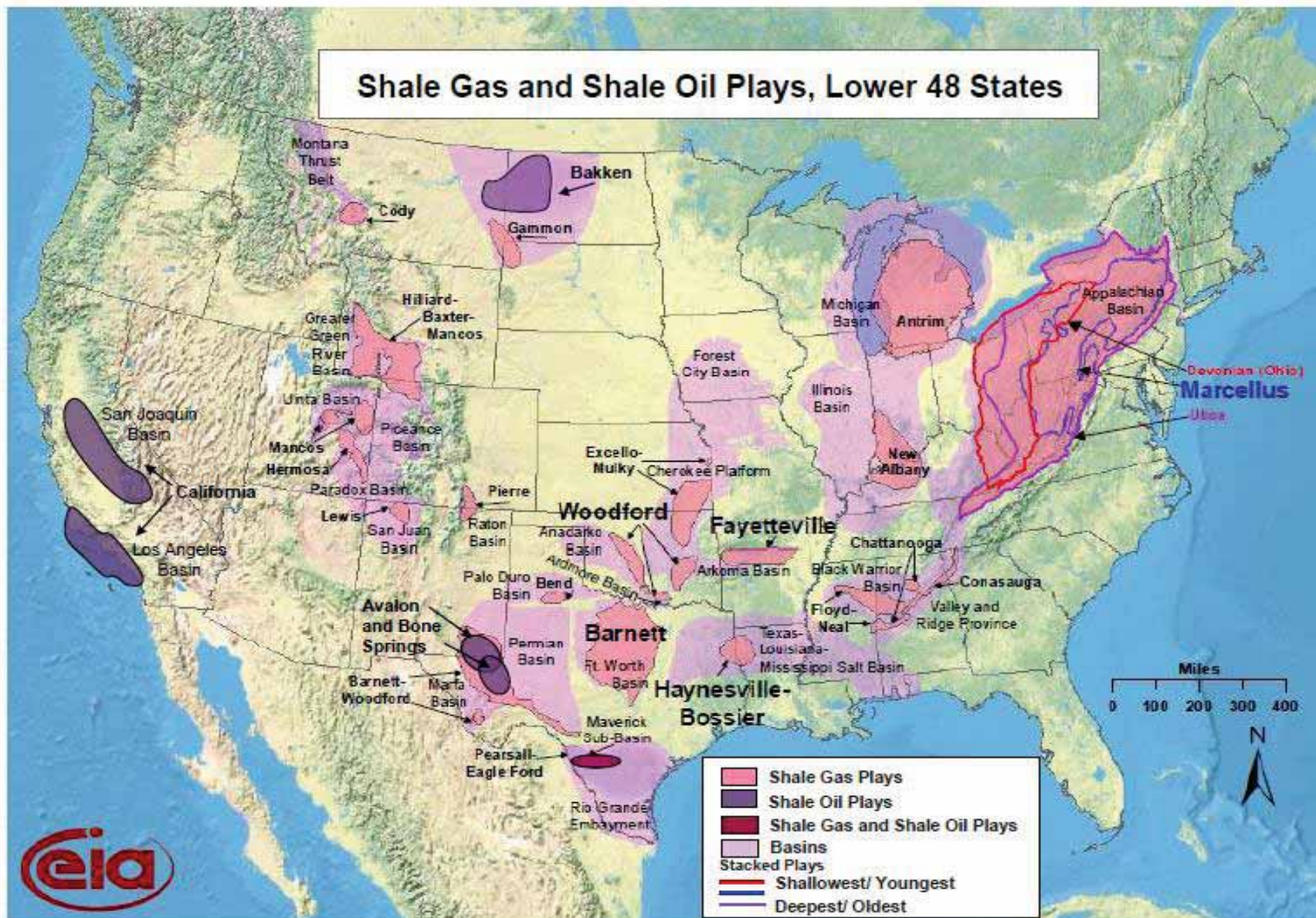
⇒ Siting...Pipes and Storage

# Project Review Process

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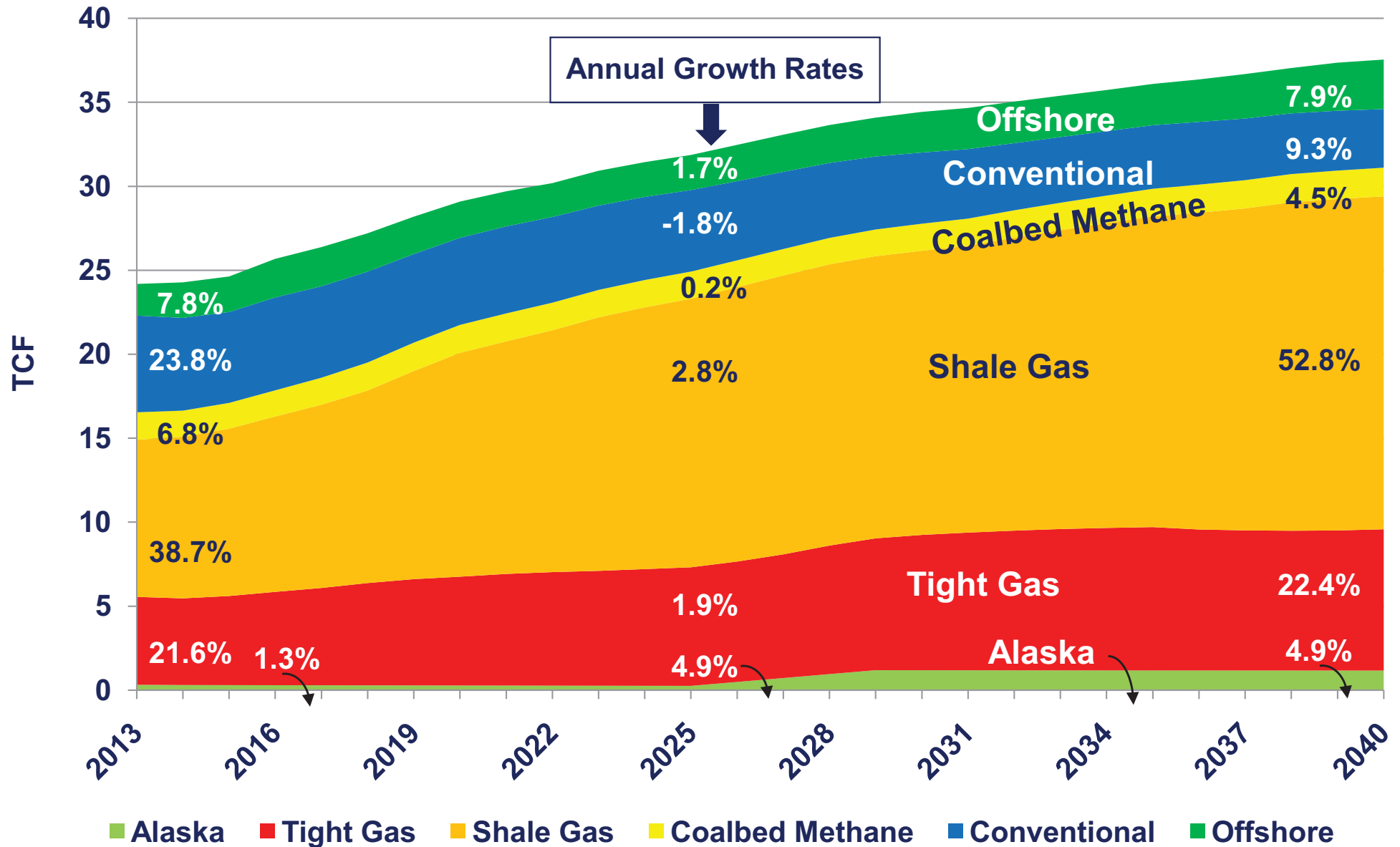
- ⇒ Project Preparation
- ⇒ Pre-filing
- ⇒ Application Review
- ⇒ Post-authorization

# Shale Gas and Shale Oil Plays Lower 48 States

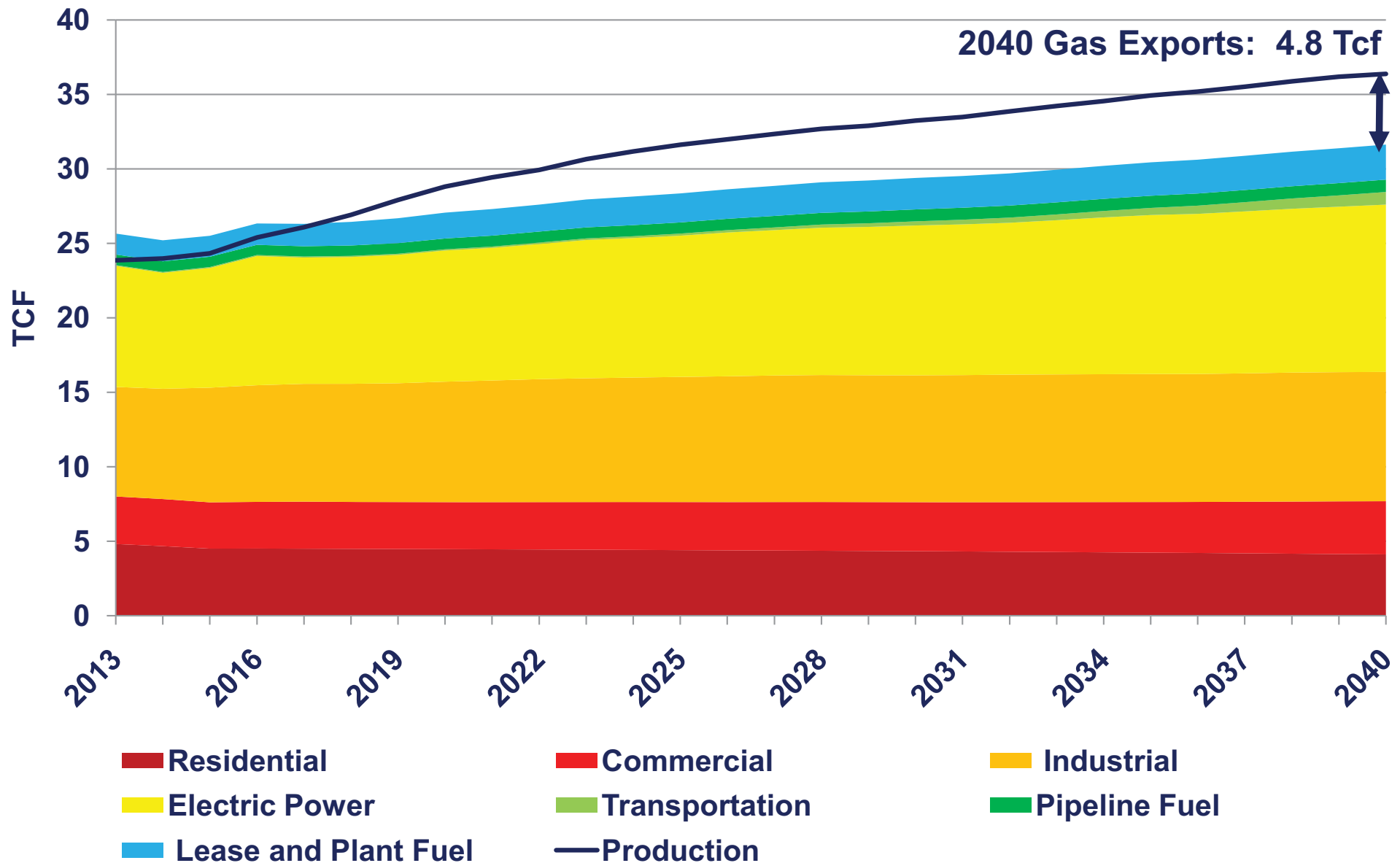


Source: EIA's Review of Emerging Resources: U.S. Shale Gas and Shale Oil Plays July 2011

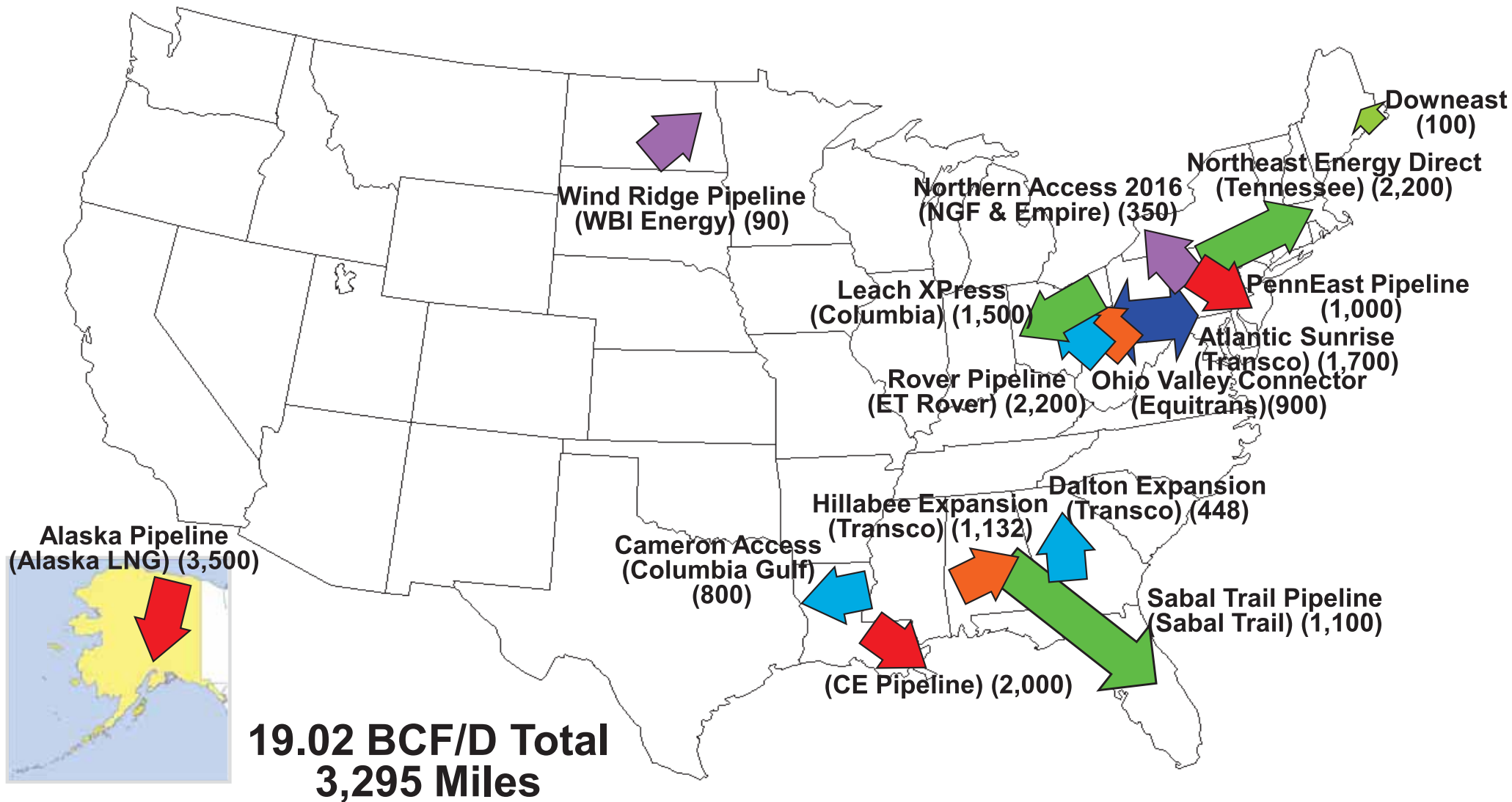
# U.S. Gas Supply 2014 Outlook



# Gas Supply v. Gas Demand

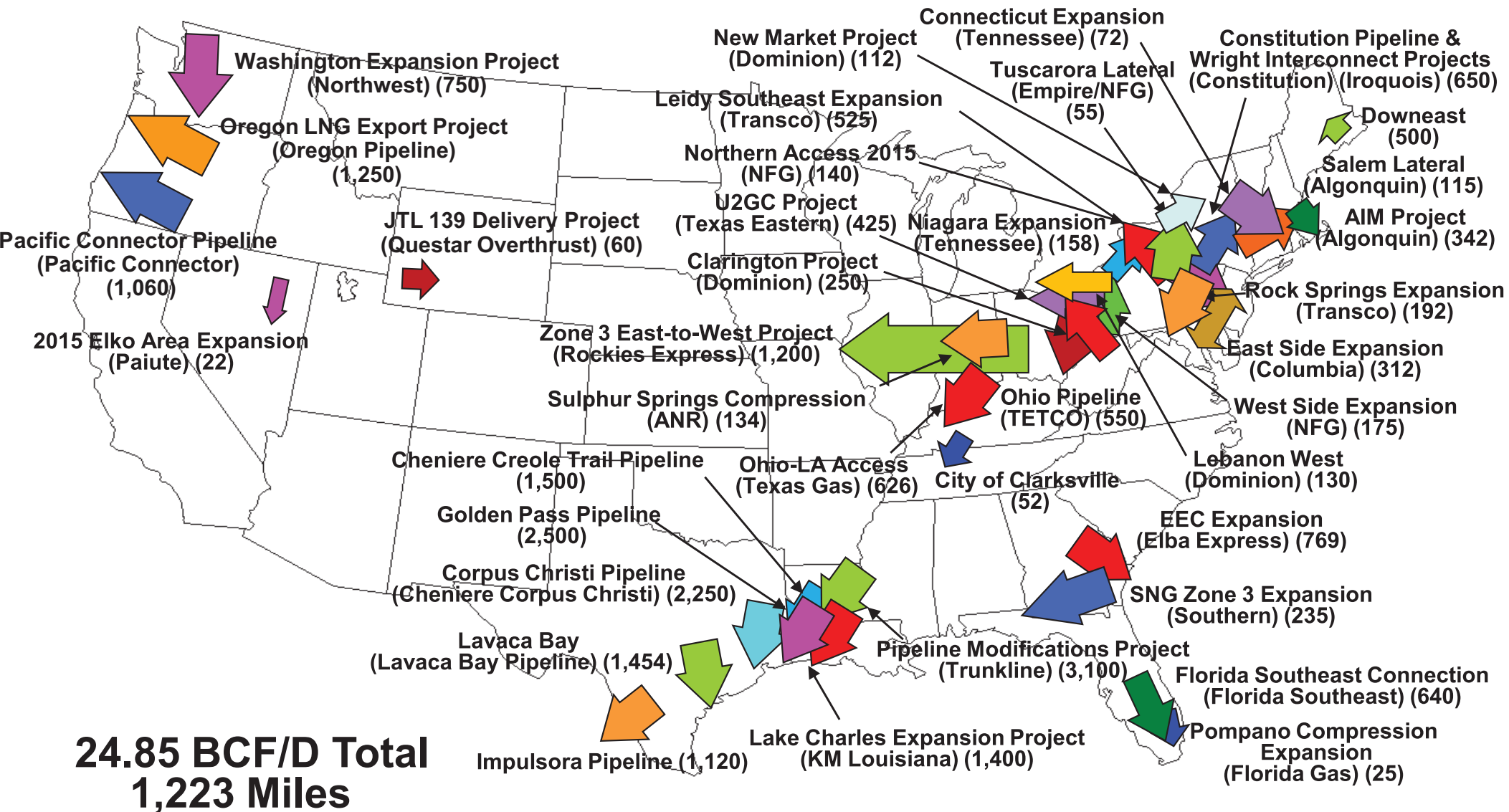


# Pipeline Projects Pre-Filing (MMcf/d)

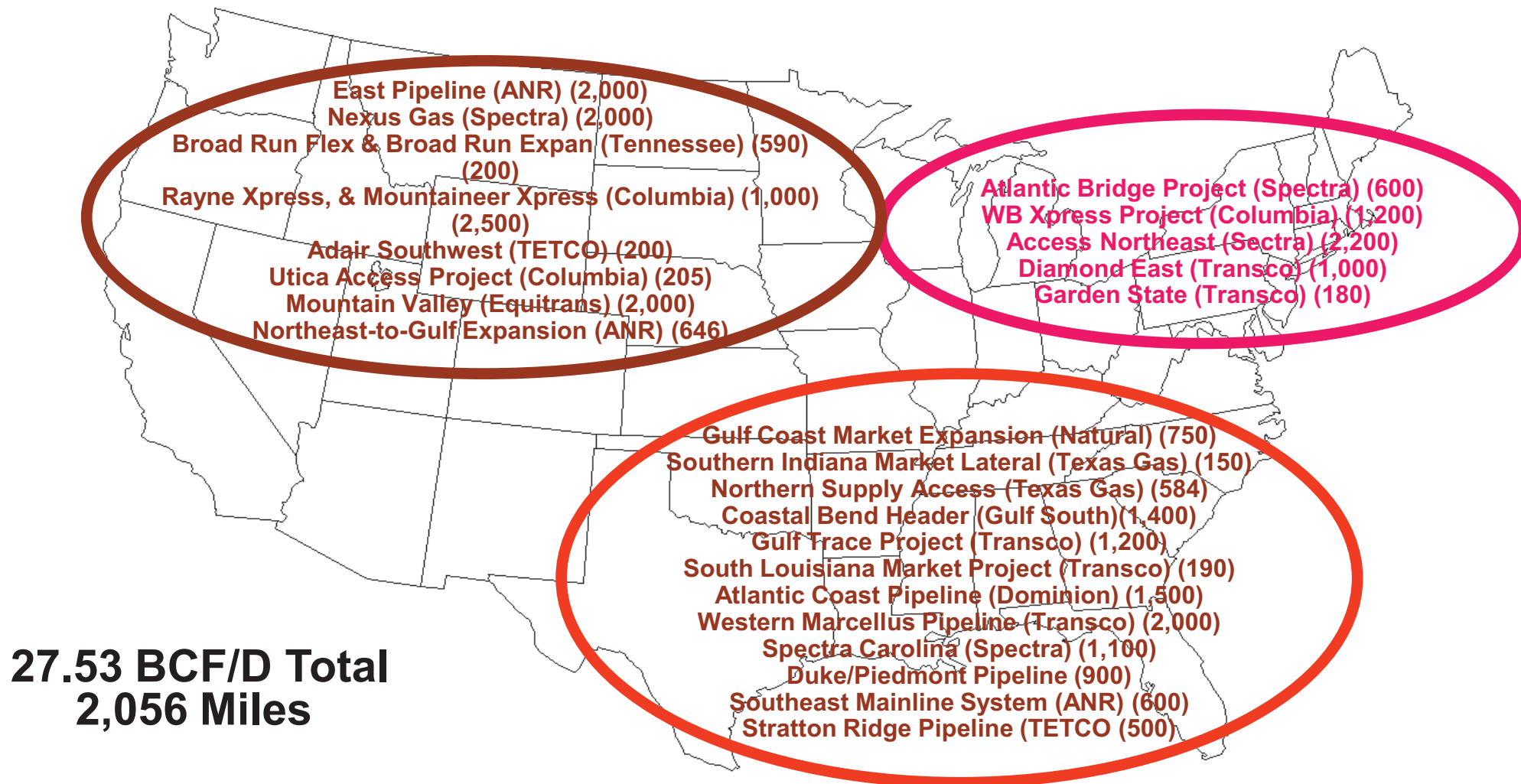




# Pipeline Projects Pending (MMcf/d)

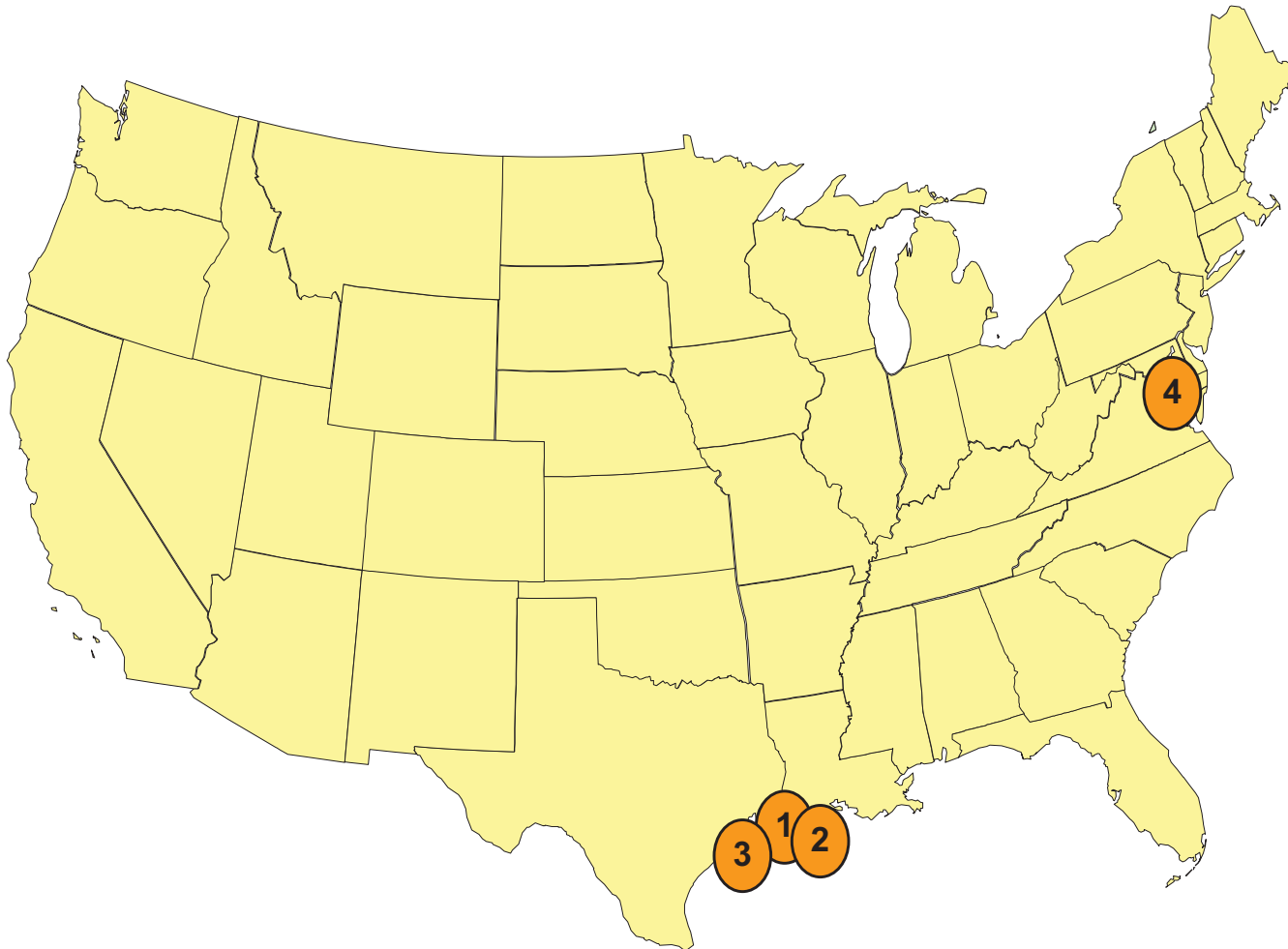


# Major Pipeline Projects On The Horizon (MMcf/d)



# 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

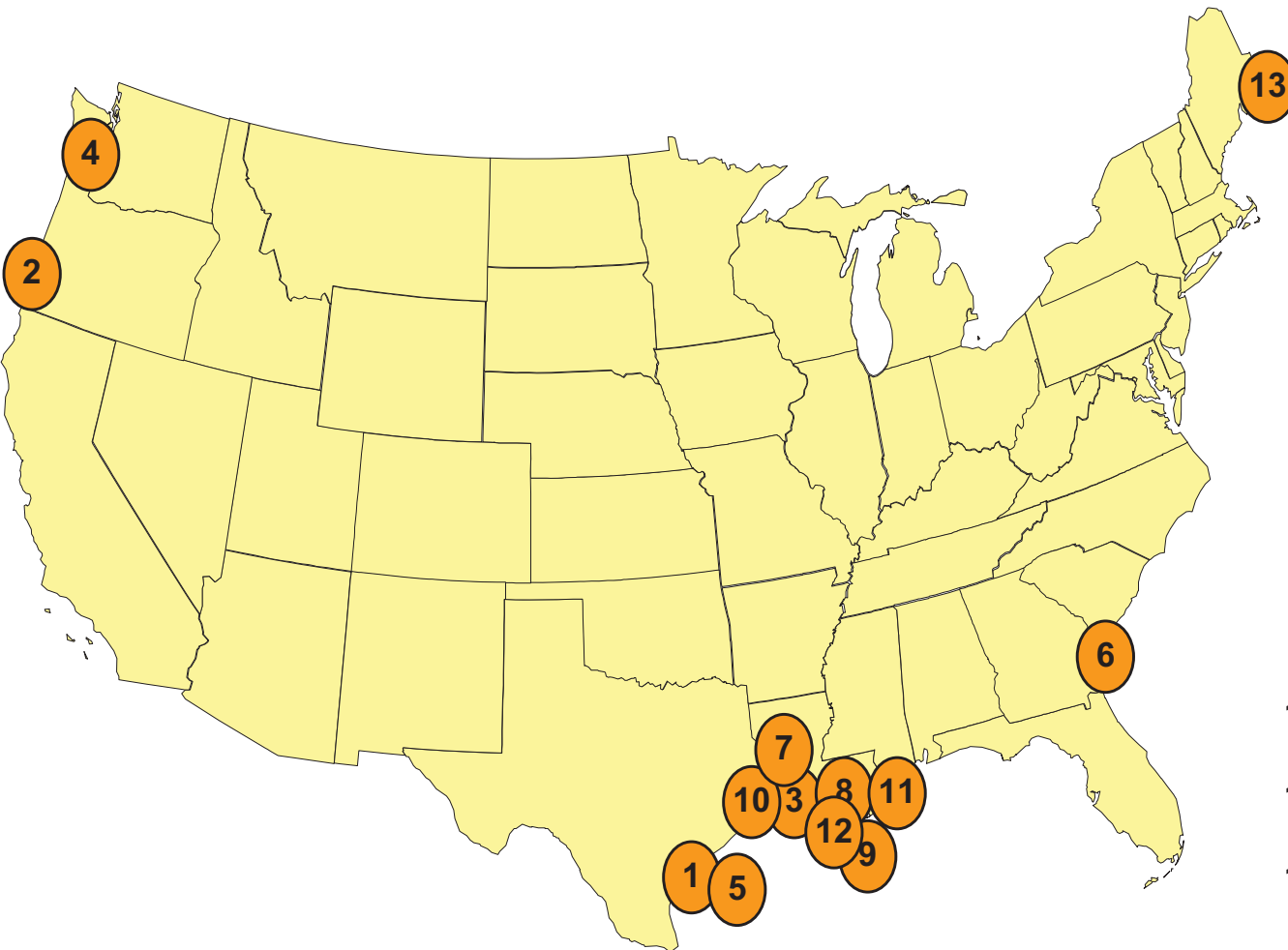
**2. Hackberry, LA:** 1.7 Bcfd (Sempra – Cameron LNG)(CP13-25)

**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

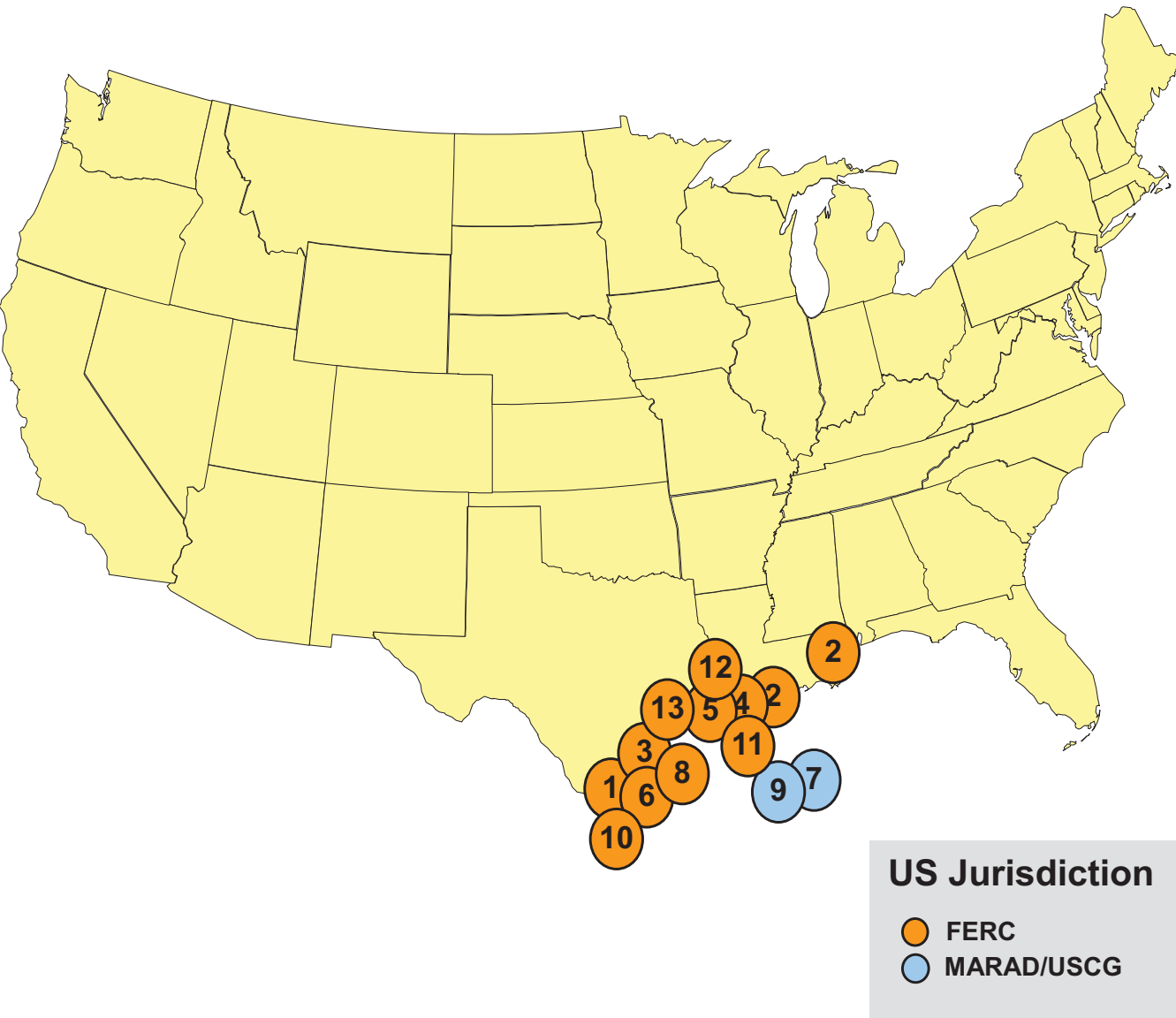


1. **Corpus Christi, TX:** 2.1 Bcfd (Cheniere – Corpus Christi LNG)(CP12-507)
2. **Coos Bay, OR:** 0.9 Bcfd (Jordan Cove Energy Project)(CP13-483)
3. **Lake Charles, LA:** 2.2 Bcfd (Southern Union - Trunkline LNG)(CP14-120)
4. **Astoria, OR:** 1.25 Bcfd (Oregon LNG) (CP09-6)
5. **Lavaca Bay, TX:** 1.38 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?

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

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# Questions?