Clean Energy Development, Energy Infrastructure, and Market Regulatory Arrangements in the U.S.

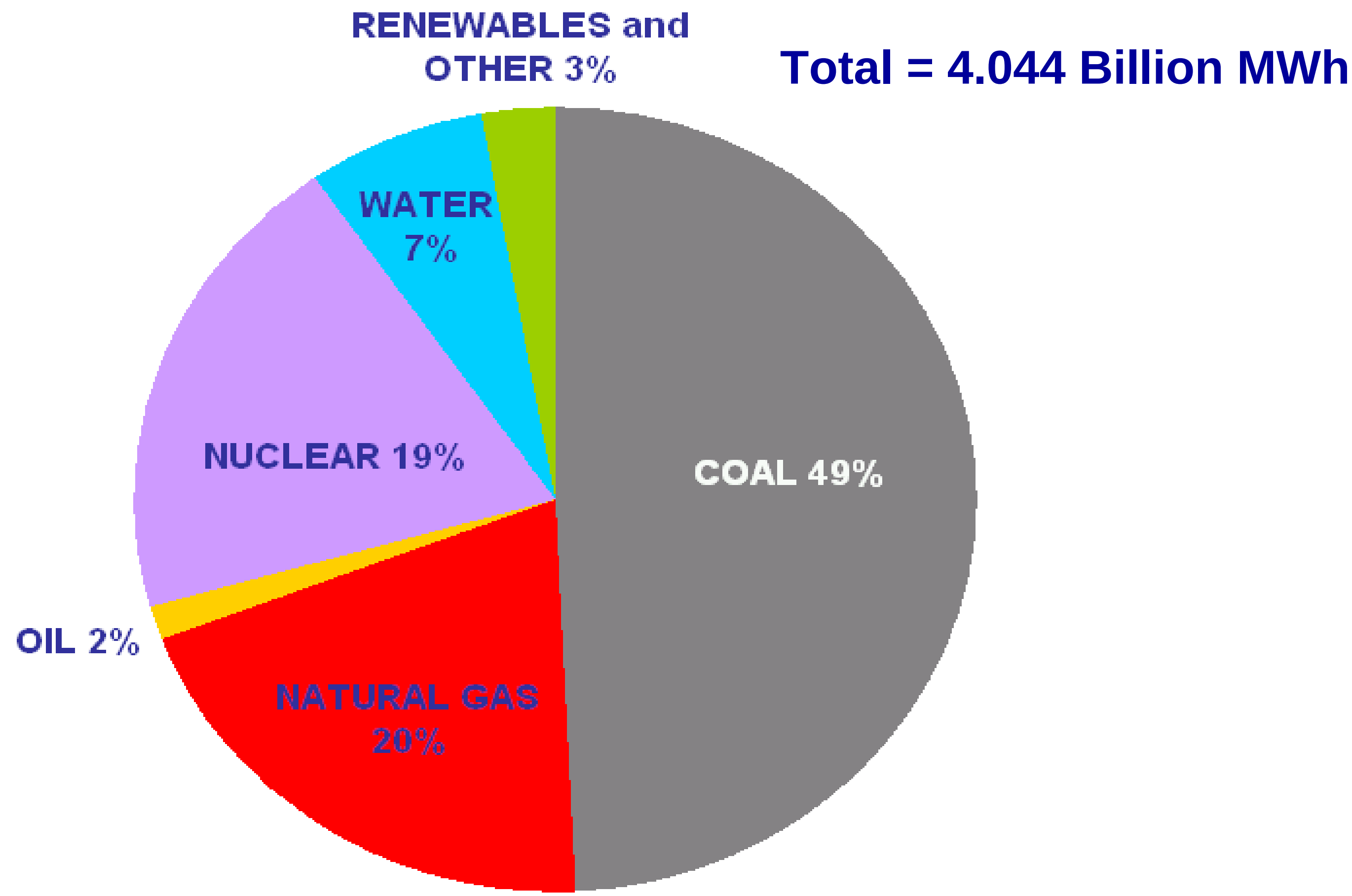
Energy Regulatory and Market Development Forum 2007

**Gold Coast, Queensland
Australia**

**Joseph T. Kelliher, Chairman
Federal Energy Regulatory Commission**

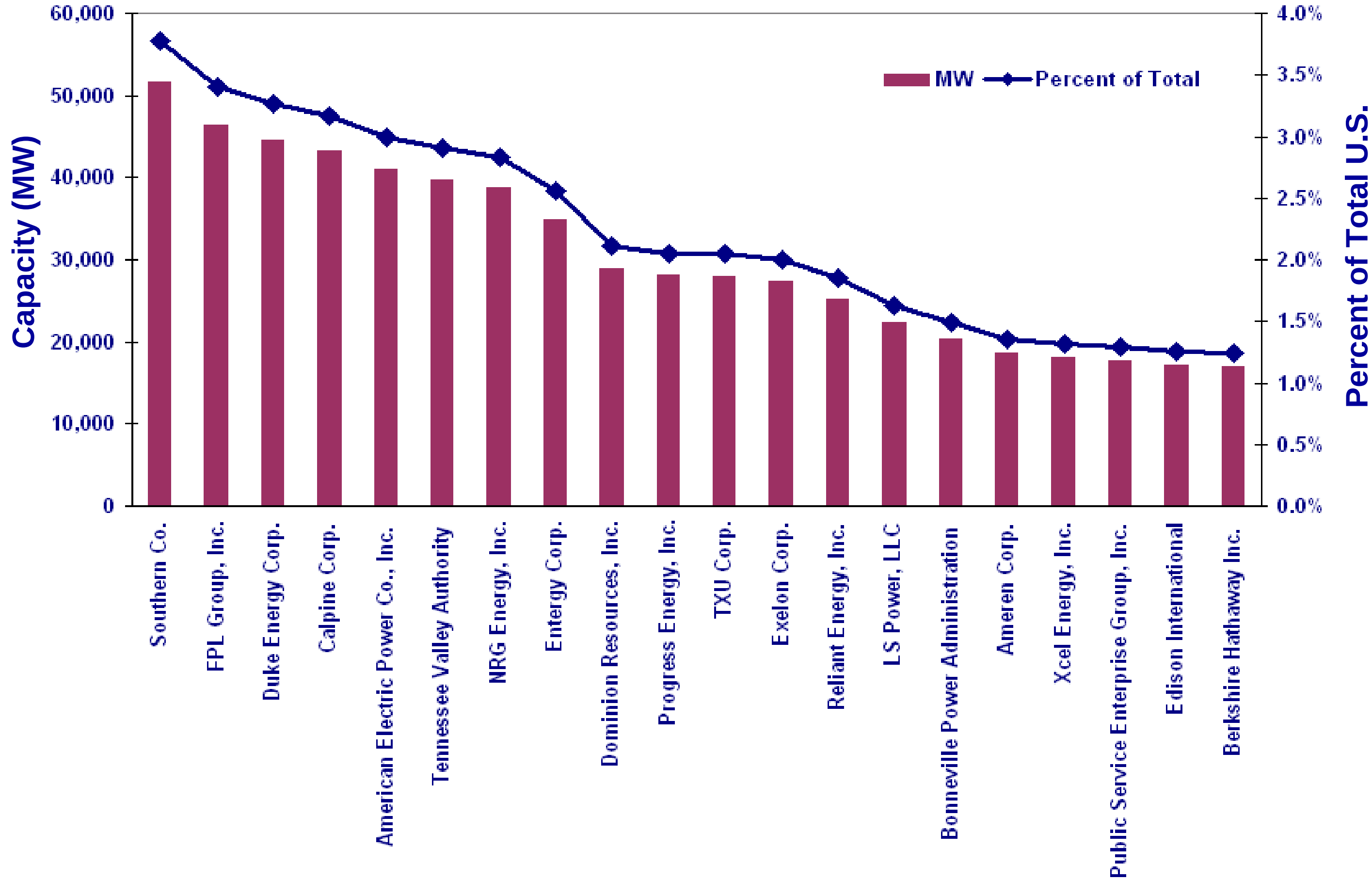
August 2007

Fueling U.S. Electric Generation 2006



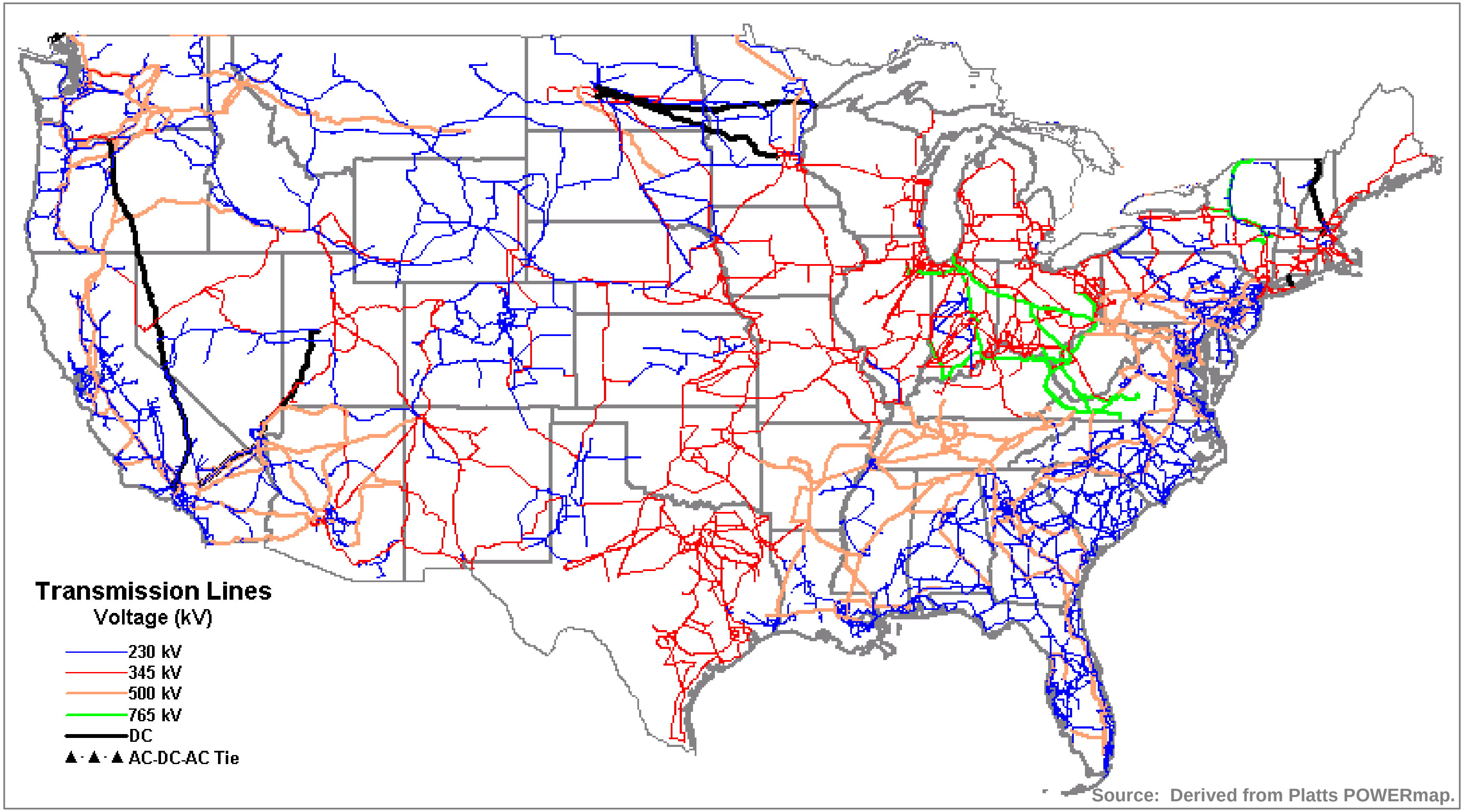
Source: Based on EIA data, Electric Power Monthly, August 2007

Top twenty generation companies in the United States

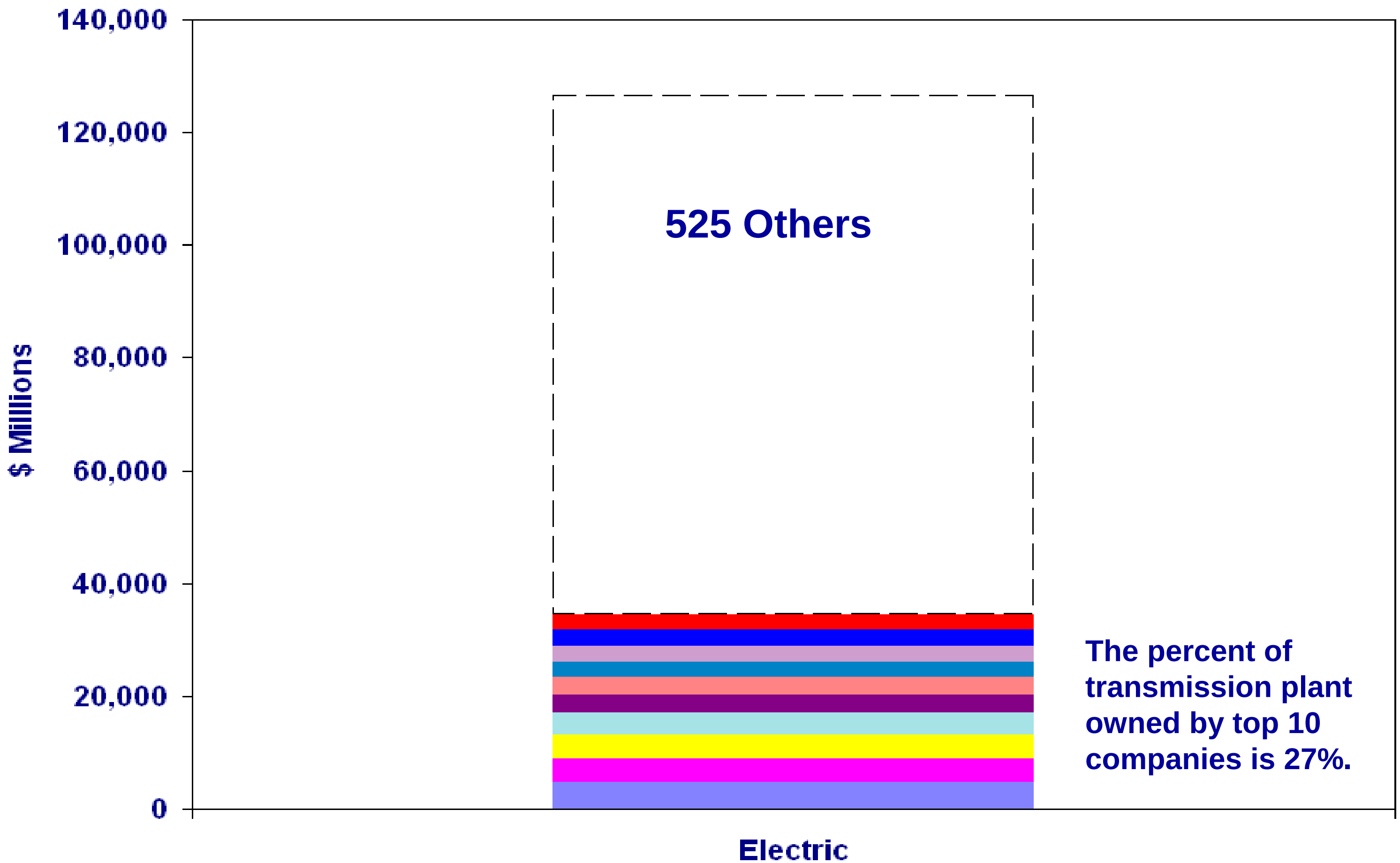


Source: Derived from Platts Powerdat.
Note: Only generation facilities with a nameplace capacity of 20 MW and greater were included.

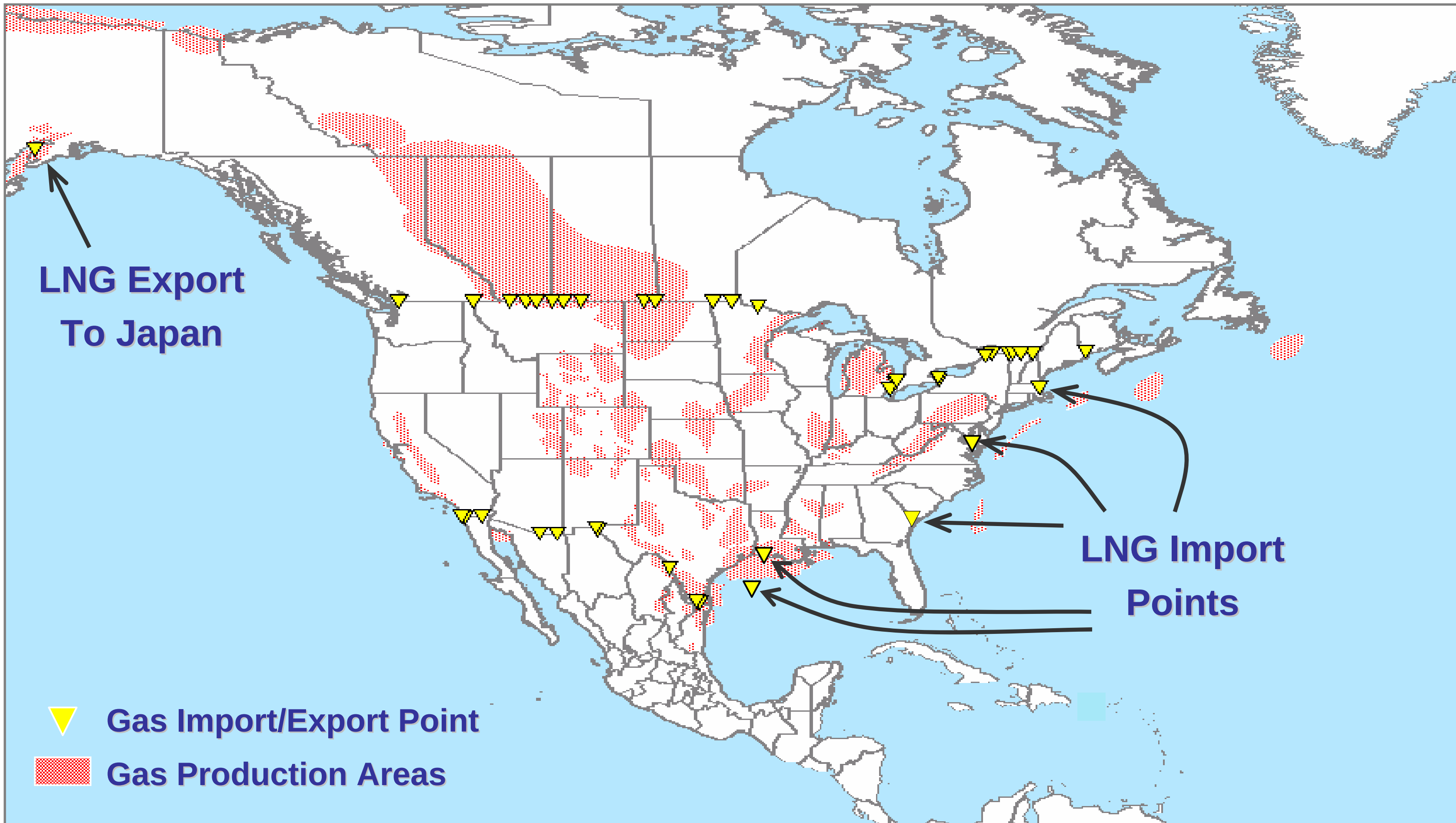
Existing Bulk Electric Transmission Grid



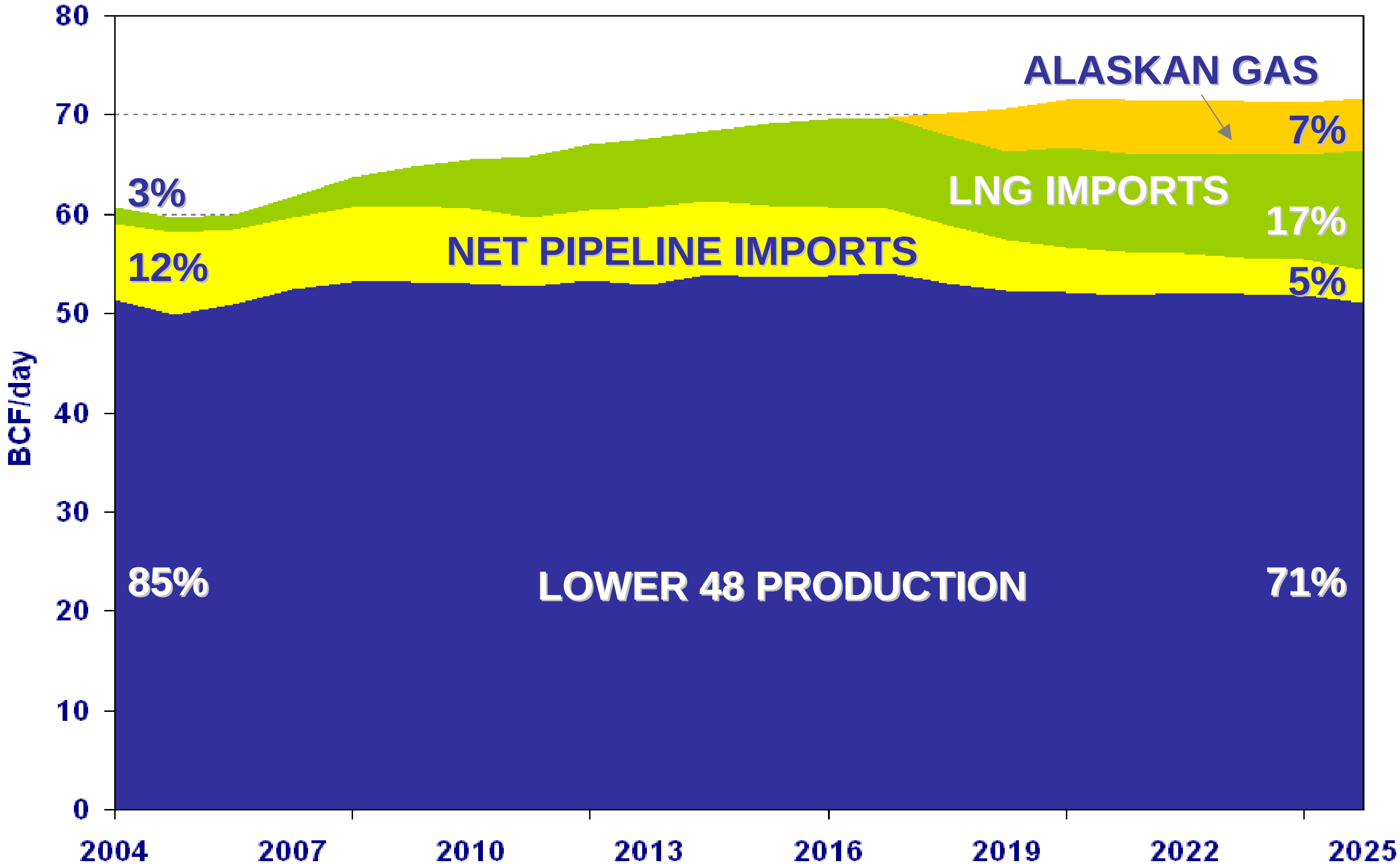
Electric Transmission Ownership (US Total and Top 10 Companies Indicated)



US Sources of Gas Supply



Domestic production and Canadian imports will not keep pace with total consumption. LNG will be a vital component of U.S. gas supply.

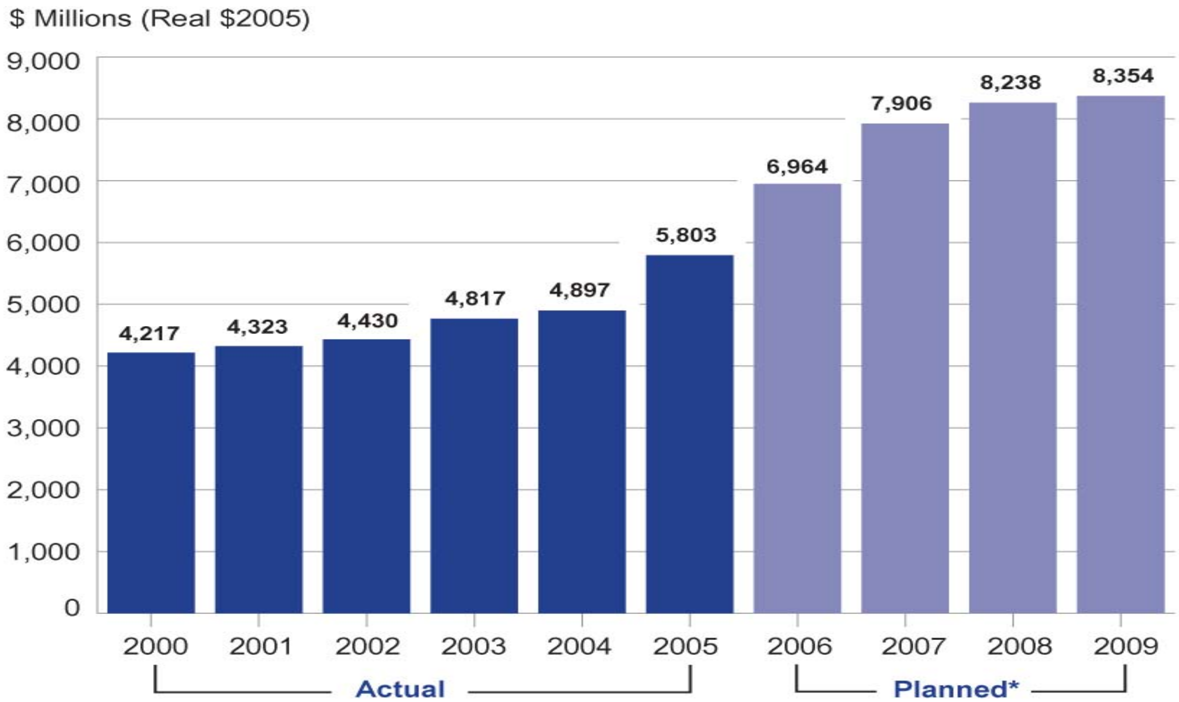


Source: EIA, EEA, FERC

U.S. Competition Policy

- Competition, not deregulation
- Reaffirmed as national policy
- Reliance on mixture of competition and regulation
- Goal: workable competition

Actual and planned transmission investment by shareholder-owned electric companies in the United States (2000-2009)



Note: In 2004 and 2005, the industry exceeded investment projections in their transmission capital budgets. *The Handy-Whitman Index of Public Utility Construction Costs* used to adjust for inflation from year to year. Data represents both vertically integrated and stand-alone transmission companies. *Planned total industry expenditures are estimated from 90% response rate to EEI's Electric Transmission Capital Budget & Forecast Survey. Actual expenditures from EEI's Annual Property & Plant Capital Investment Survey & Form 1s.

Source: Edison Electric Institute

Source: Edison Electric Institute. Actual and Planned Transmission Investment by Shareholder-Owned Electric Companies (2000-2009). http://www.eei.org/industry_issues/energy_infrastructure/transmission/index.htm

In the United States, there are 480,000 kilometers of interstate and intrastate transmission pipeline.