



**YES. ... No. ... DEFINITELY YES. ...
ABSOLUTELY NOT!**

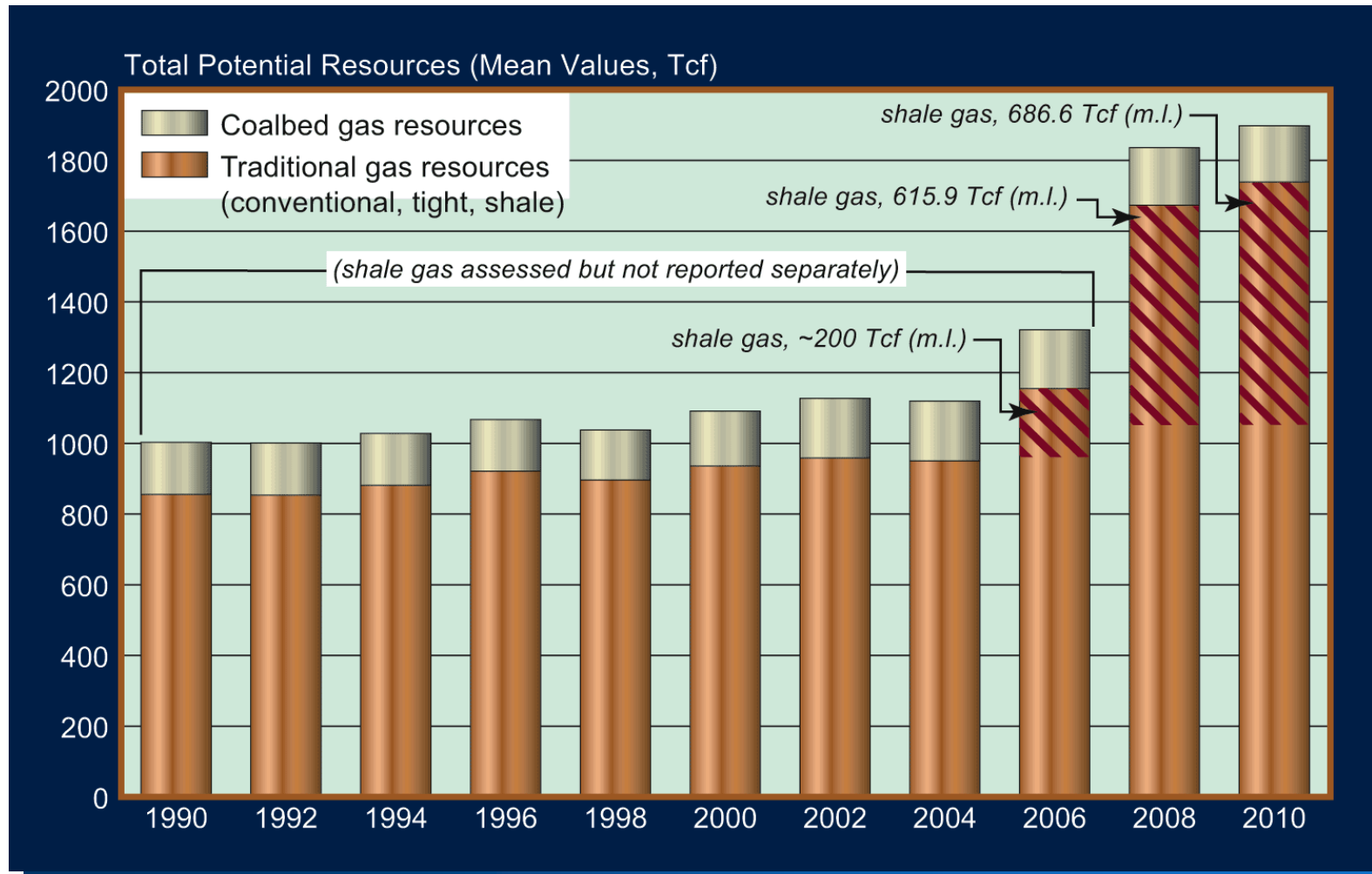
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**MONUMENTAL MARC 2011
JUNE 7, 2011
RAPID CITY, S.D.**



PGC Resource Assessments, 1990-2010

Total Potential Gas Resources (mean values)



Active Shale Gas Plays

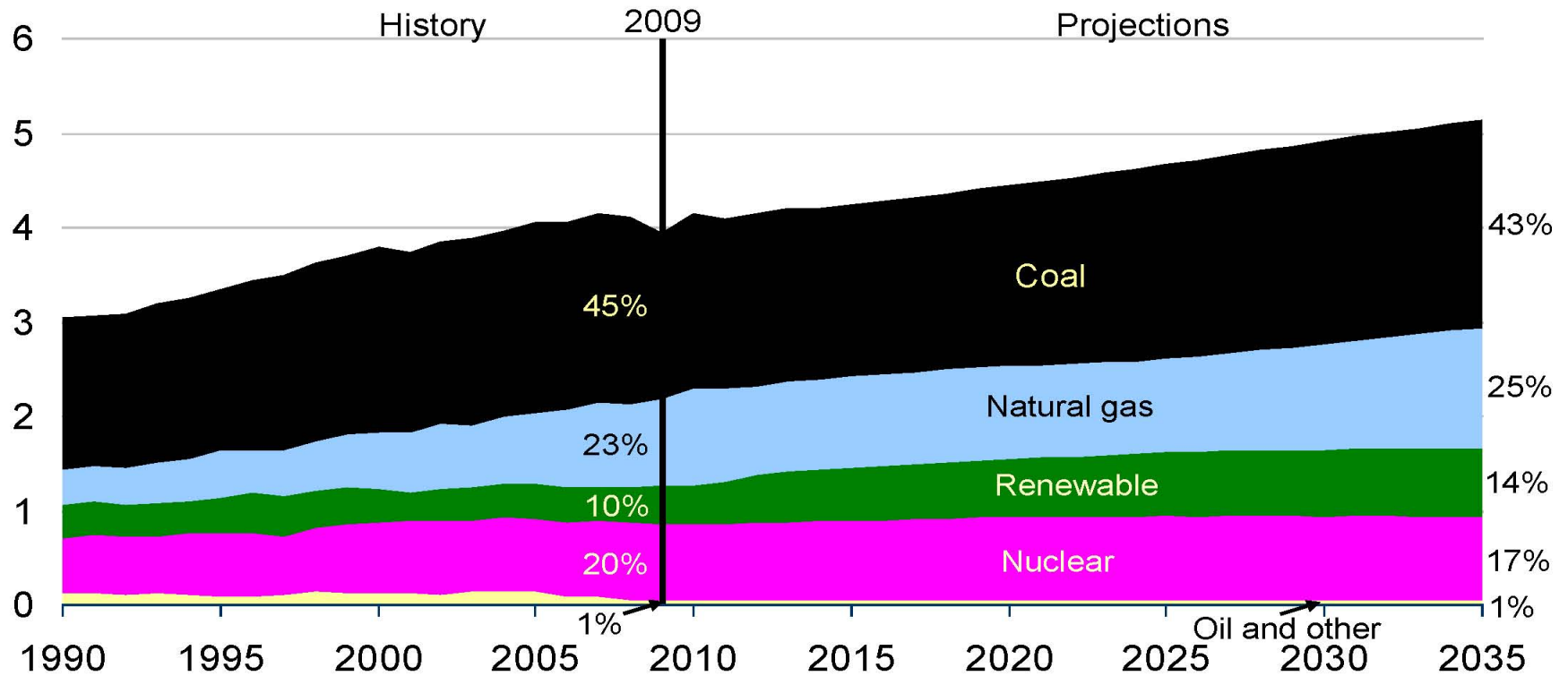
Lower 48 States



Source: Energy Information Administration based on data from various published studies
Updated: May 26, 2009

The projected electricity mix gradually shifts to lower-carbon options, with generation from natural gas rising 37% and renewables rising 73%

electricity net generation
trillion kilowatthours per year

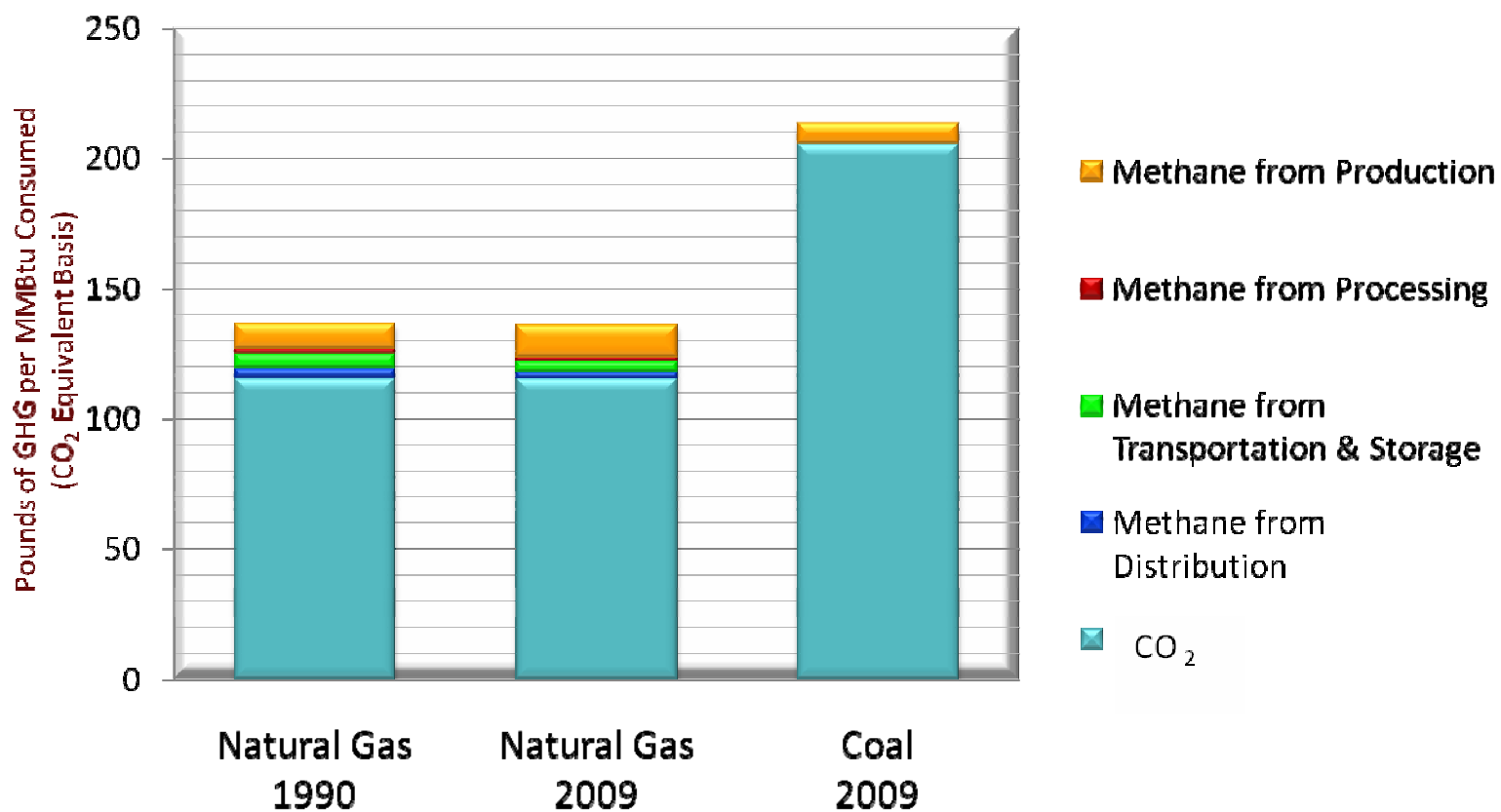


Richard Newell, December 16, 2010

Source: EIA, *Annual Energy Outlook 2011* 16

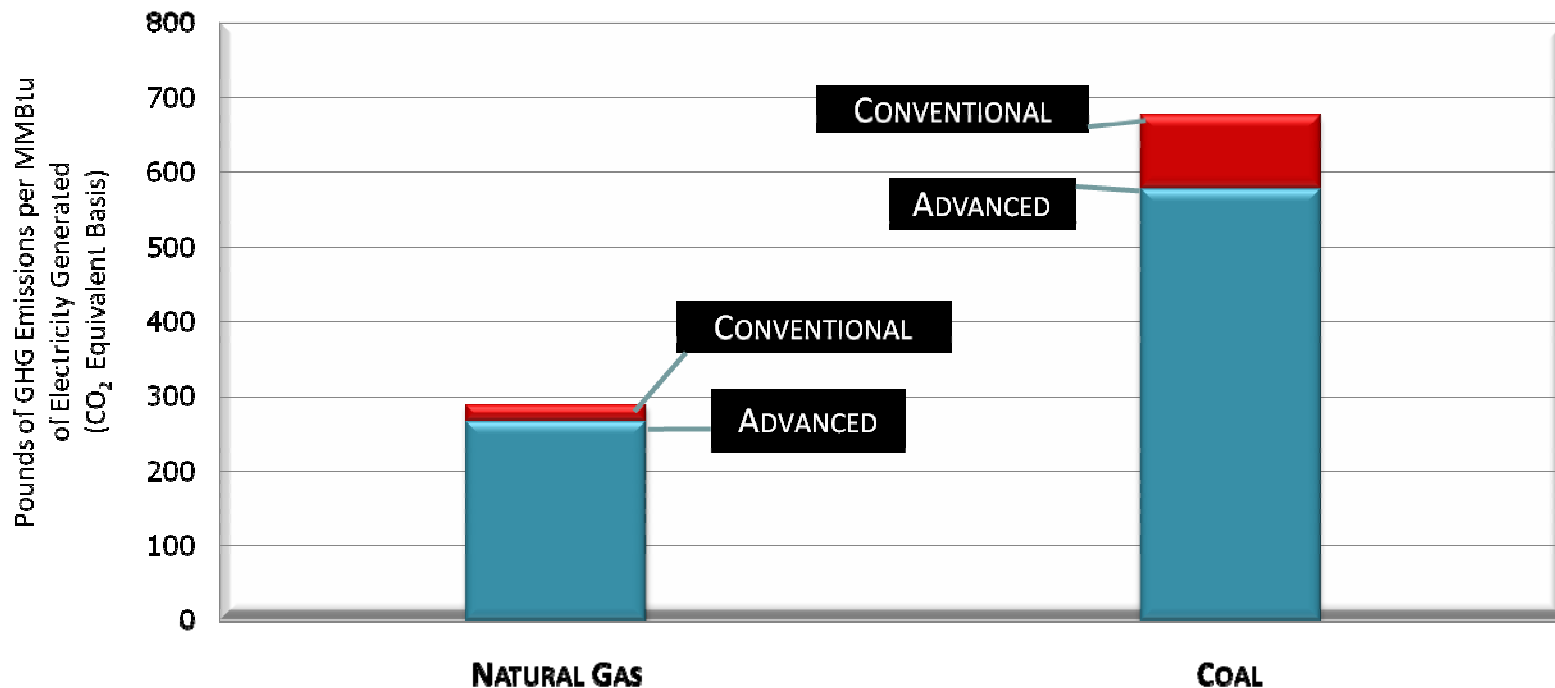


Greenhouse Gas Emissions per MMBtu of Fuel Consumed



NOTES: Data based on CO₂ equivalence using methane potency factor of 21 as per Intergovernmental Panel on Climate Change. Consumption data from U.S. Energy Information Administration website. Emissions data from U.S. Environmental Protection Agency, *Greenhouse Gas Inventory, April 18, 2011*.

Greenhouse Gas Emissions per Unit of Electricity Produced - - Conventional and Advanced Generating Units



NOTES:

Based on GHG emissions per MMBtu of fuel consumed (See Table 1) and electricity conversion factors for conventional and advanced equipment as employed by the U.S. Energy Information Administration. Includes emissions of CO₂ and methane (methane GWP of 21 times CO₂ as per IPCC).

Natural Gas Direct Use Has an Advantage Relative to Other Fuels

Checkmark given for each advantage a fuel source provides

	Direct Use Natural Gas	Heating Oil	Electricity				
			Coal	Coal CCS	Solar / Wind	New Nuclear	New Gas
Cost effective	✓+						✓
Resource efficiency	✓+				✓	✓	✓
Resource availability	✓		✓	✓	✓	✓	✓
Enhances energy security	✓		✓	✓	✓	✓	✓
Lowers carbon emissions	✓			✓	✓	✓	✓
Reliable / Proven Technology	✓	✓	✓				✓
Regulatory Certainty	✓	✓					



THANK YOU!

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