**IHS ENERGY**

**North American Gas and Power Scenarios**

**BENEFITS:**
The service allows members to

- Learn how key drivers—such as fuel prices, global LNG developments, renewable energy technologies, environmental policies, and shifting regulations—impact business conditions

- Test internal strategy and risk analysis with a third-party expert perspective to reveal strengths and weaknesses

- Assess long-term investment strategies with a sustainable, integrated approach across regional markets

- Keep risk analyses up to date with regular scenario alerts and updates

- Identify new investment opportunities and stay abreast of competitive and regulatory threats

IHS Energy’s North American Gas and Power Scenarios focus on the future of the North American natural gas and power industries—projecting how business conditions might change and exploring the appropriate strategic and investment responses.

This service provides ongoing monitoring and updating of our proprietary long-term scenarios, alerts clients to impending changes in the industry, and assesses the strategic implications of unfolding events.

**Service Components**
North American Gas and Power Scenarios members benefit from

- **Long-term outlook (to 2040):** Access to IHS Energy’s latest long-term regional US and Canadian gas and power scenarios.

- **Semiannual client meetings:** Held every spring and fall. The spring meeting focuses on the research agenda for the year. The fall meeting reviews the detailed regional results of the research and identifies the critical signposts for the direction that the gas and power industries are heading.

- **A midyear update:** This complete update of the “planning” scenario incorporates the most recent monthly gas and power market data, the macroeconomic outlook, and the near-term outlooks of IHS Energy’s North American Gas and Power Advisory Services.

- **Access to the data center:** Supplemental data provide long-term projections of power, natural gas, and emission allowance markets. Content includes annual market summaries at the NERC region/subregion level; monthly wholesale electricity prices for over 20 key US and Canadian power markets; annual capacity prices’ natural gas balances for the US and Canada; natural gas regional productive capacity; natural gas demand by census and power regions; natural gas commodity price outlooks for Henry Hub and major regional markets; annual emission amounts and emission allowance prices for NOX, SO2, and carbon; and projections for the US GDP and GDP Deflator Index.
IHS Energy’s Global Scenarios Framework is the foundation for our energy insights. Our suite of scenarios draws upon expertise from across IHS and addresses key questions that policymakers and energy industry decision makers face. Rivalry—our planning scenario—comprises the set of assumptions and outlooks in our base-case view. The alternatives—Autonomy and Vertigo—offer alternative views of the future and help our clients with contingency planning in the event of major deviations from the assumptions in Rivalry.

Rivalry
- Energy rivalry is driven by four factors: price differentials, environmental concerns, technology improvements, and energy security.
- Gas loosens oil’s grip on transport demand; and renewables are increasingly competitive with gas, coal, and nuclear in power generation.
- Pollution paradox: countries grow richer, consume more energy, and then address pollution.

Autonomy
- Market, technology, and social forces transform the global energy system.
- Decentralization of energy supply is characterized by widespread development of unconventional oil and gas.
- Generational change and urbanization pressures alter energy demand dynamics.
- Breakthroughs emerge in electricity storage and solar PV.

Vertigo
- Frequent economic and financial tremors cause instability that undermines confidence and exacerbates risk aversion; investment time lag leads to mismatches between demand and supply.
- Disruptive innovations heighten sense of imbalance and instability.