

# Transforming Supply

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Observations

Policy

And

In 20 Years

2013:  
A Great Inflection

We are on the right  
path--finally

# Observations

# Demand-Control Rules

# Efficiency Incentives

Big-lumps to local  
dollops



No New Nuclear and  
Coal

Backbone Still Needed

# The Nemesis: Natural Gas

Market-driven solar and  
renewables with storage

Higher Cost

# Citification Challenge

Will we use less energy because we are more efficient or because we are poorer?

Policy



Enable,  
Not Controlling

Encourage new  
entrants

# Transfer Risk to Users

# Localize Decisions

In 20 Years

Efficiency will skyrocket;  
Impact will diminish

"Cellular" will dominate

Generation will be local  
and renewable



Integrated electron  
world

Conclusion

Use less,  
Store more

Build small,  
Build close

Enable,  
Don't control

Thank you  
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