

# Energy/Utilities Industry Overview

**Wendell Dallas**

**VP Operations, Atlanta Gas Light & Chattanooga Gas**

**Chair - State Workforce Investment Board – Georgia**

# ***“Safety Minute”***

# At-a-Glance



- Atlanta-based energy services company
- Nation's largest natural gas-only distribution company by customer count
- NYSE listed: GAS; listed on S&P 500 Index
- [www.aglresources.com](http://www.aglresources.com)



# Who Are We?



Keeping construction progressive and turn key



Keeping the lights on



Keeping the professionals cooking



Keeping the home fires burning



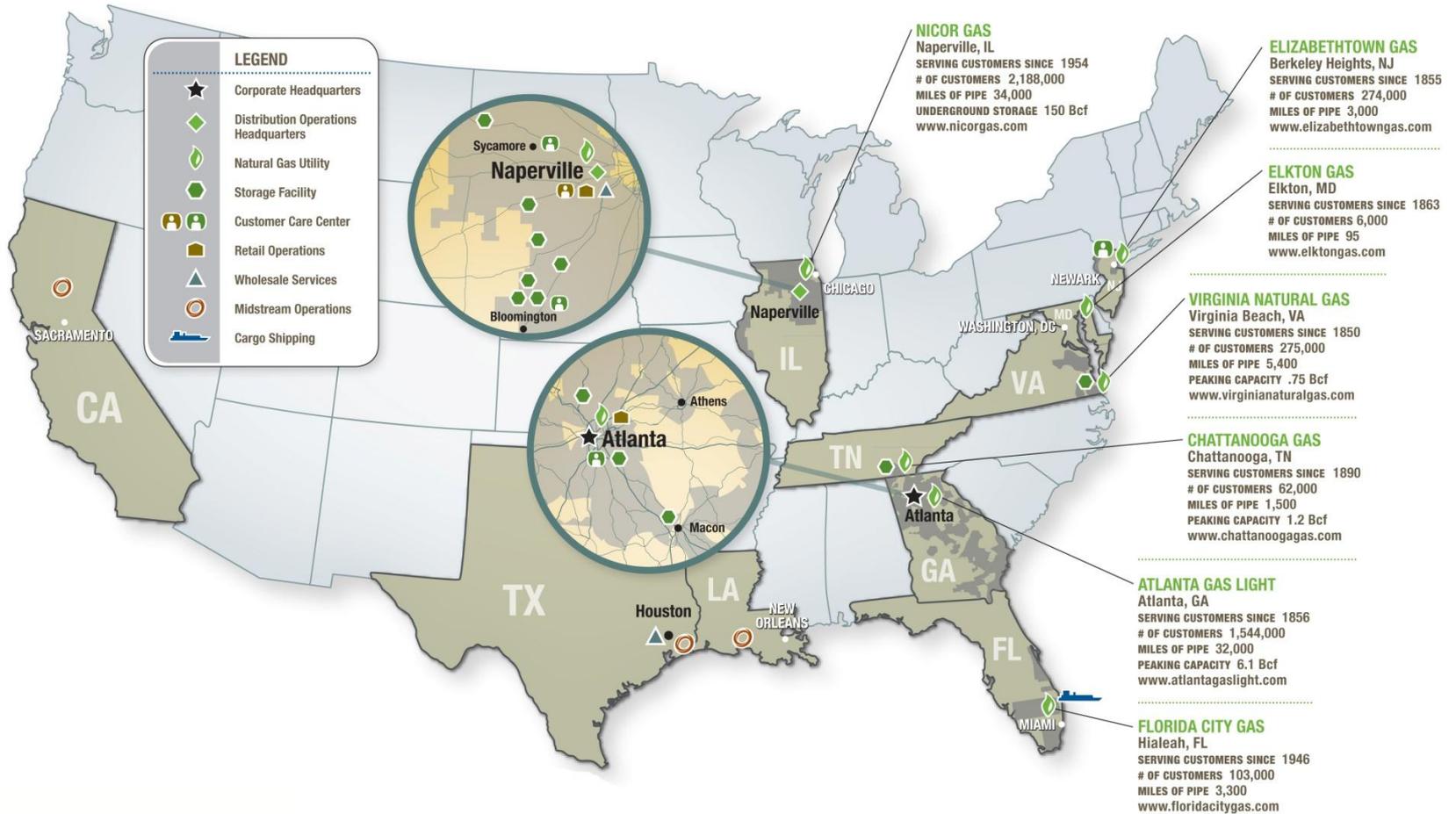
Keeping the laundry efficient, fast and fluffy



Keeping the water continuously hot



# Corporate Footprint



# Corporate Values



- **SAFETY is the NUMBER ONE value in our organization**

# Corporate Values (cont.)

- **Integrity, Honesty, Dignity & Respect**
- **Personal Responsibility & Teamwork**
- **Stewardship**
- **Value Seeking**
- **Generosity of Spirit**



# Industry Trends & Challenges

# New Technologies Have Unlocked Abundant U.S. Supply

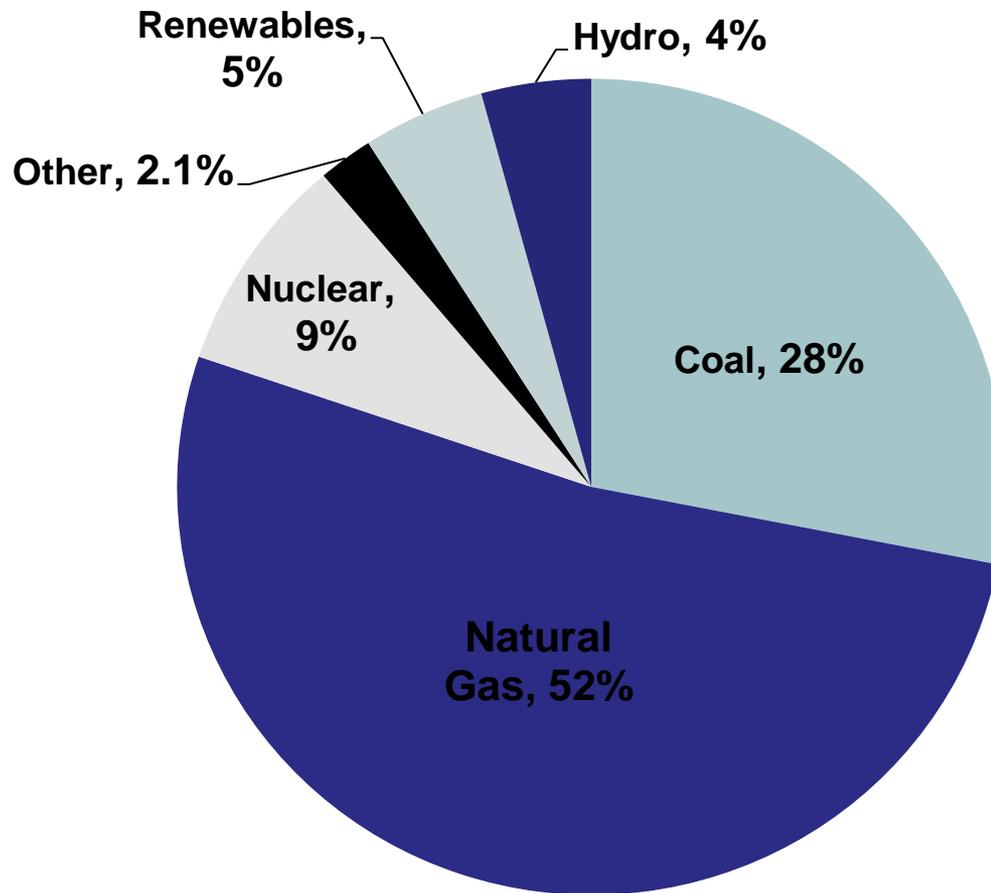


# Significant Industry Change Drivers

- **Shale gas – supply abundance has led to low natural gas prices and increased electricity generation from natural gas.**
- **EPA regulations – leading to less coal generation, increasing generation from natural gas.**
- **State Renewable Portfolio Standards (RPS) – the primary driver for renewables.**
- **Nuclear – a couple new plants are under construction in the Southeast, retirements are planned in other regions.**
- **Electric demand growth – varies by region, but overall expected to be flat**

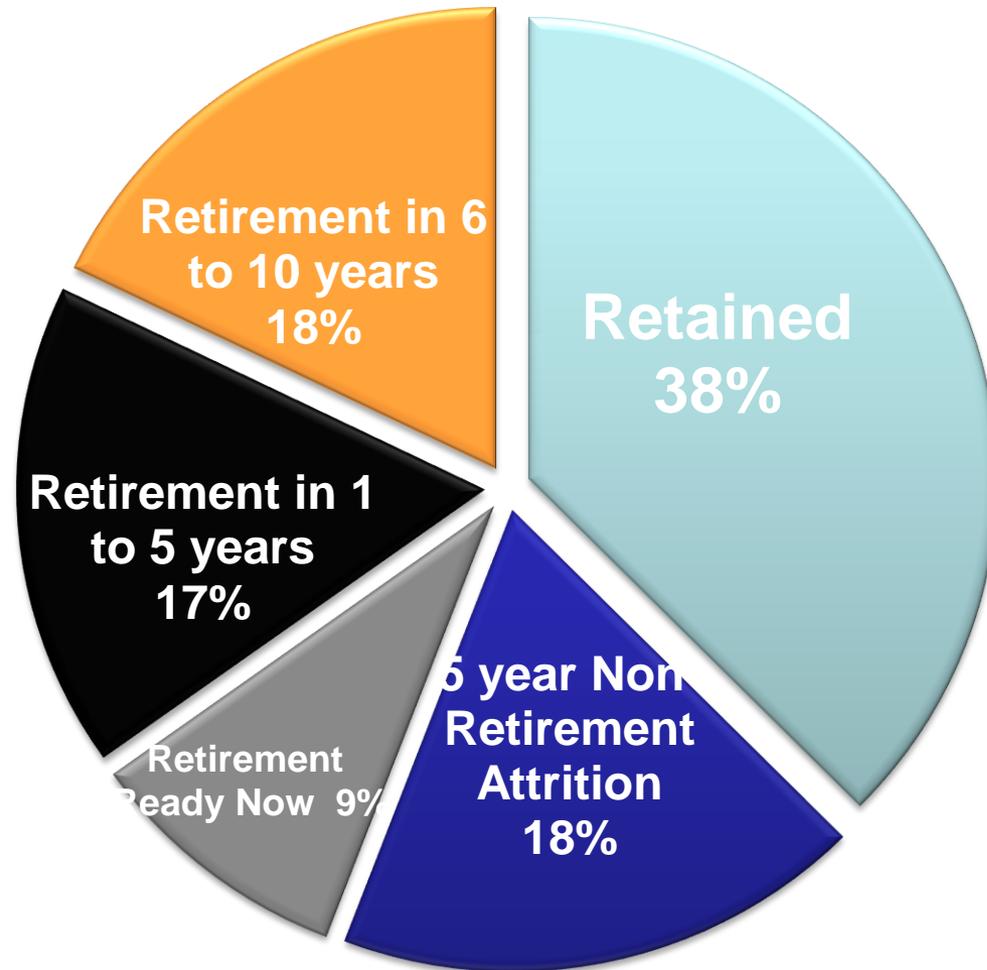


# Current Generation Capacity Mix in the South/Southeast



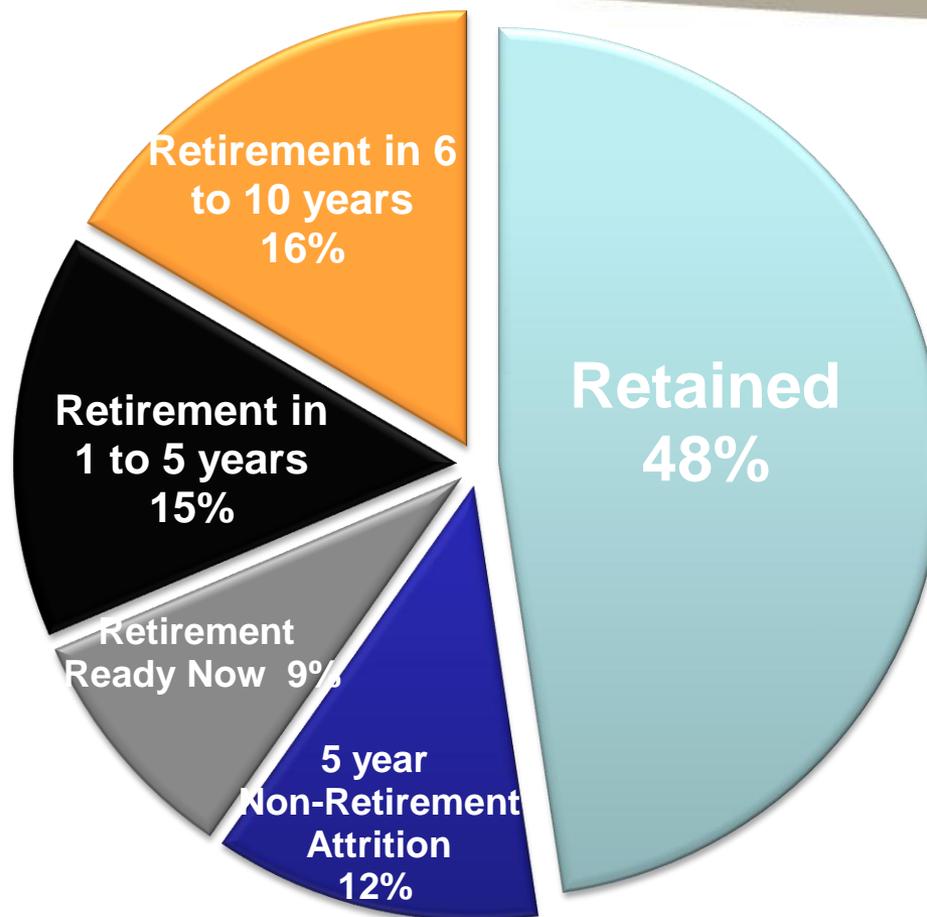
# Total Industry Potential Replacement Impact on Retirement and Non-Retirement Attrition

**62 % of the workforce may need to be replaced in the next 10 years**



# Key Jobs - Potential Replacement Impact on Retirement and Non-Retirement Attrition

**52 % of skilled technicians and engineers may need to be replaced in the next 10 years**



# Largest Energy Gaps in State of Georgia

- General/operations managers (bachelor's degree or higher plus work experience required)
- First line supervisors/managers (work experience in related field)
- Construction trades and extraction workers (work experience in related field)
- Accountants and auditors (bachelor's degree)
- Electrical engineers (bachelor's degree)
- Industry production managers (work experience in related fields)

# Growth in Georgia Energy Occupation Demand 2011 - 2020

- Power/Communication Lines/Related Structures 78%
- Crude, Petroleum and Natural Gas Extraction 60%
- Fossil Fuel Electric Power Generation 45%
- Power, Distribution and Special Transformer Mfg 43%
- Other Scientific/Tech Consulting 37%
- Nuclear Power Generation 27%
- Engineering services 21%
- Testing Labs 21%

# How Can We Work Together?

- Recognize and Strengthen your Top 2-3 Competencies
- Build New or Leverage Existing Alliances
- Remove Barriers – be easy to do business with
- Learn our Requirements:
  - ✓ Help us find or build needed **Technical Skills**
  - ✓ Help us find or build needed **Interpersonal Skills**
  - ✓ Help us attract and manage a **Local, Diverse** workforce that mirrors community demographics
  - ✓ Help us attract **High School Graduates** with mechanical aptitudes

