

Natural Gas—Not Nuclear—Is the Key to Powering North America's Future

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A receiving platform at the export terminal for the Coastal GasLink natural gas pipeline under construction in Kitimat, B.C., on Sept. 28, 2022. The Canadian Press/Darryl Dyck



By Gwyn Morgan

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Commentary

After decades on the outs with environmentalists and regulators, nuclear power is being heralded as a key component for a “net zero” future of clean, reliable energy. Its promise is likely to fall short, however, due to some hard realities. As North America grapples with the challenge of providing secure, affordable, and sustainable energy amidst soaring electricity demand, it is time to accept this fact:

Natural gas remains the most practical solution for powering our grid and economy.



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Nuclear power’s limitations are rooted in its costs, risks, and delays. Even under ideal circumstances, building or restarting a nuclear



facility is arduous. Consider Microsoft’s much-publicized plan to [restart the long-dormant Unit 1 reactor](#) at Three Mile Island in



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Pennsylvania. This project is lauded as proof of an incipient “[nuclear revival](#),” but despite leveraging existing infrastructure it will cost US\$1.6 billion and take four years to bring online.

This is not a unique case. Across North America, nuclear energy projects face monumental lead times. The new generation of small modular reactors (SMRs), often touted as a game-changer, is still largely theoretical. In Canada—[Alberta](#) in particular—discussions around SMRs have been ongoing for years, with no concrete progress. The most optimistic projections estimate the first SMR in Western Canada might be operational by 2034.

The reality is that nuclear energy cannot scale quickly enough to meet urgent electricity needs. [Canada’s power grid is already strained](#), and electricity demand is set to grow significantly, driven by electric vehicles and [enormous data centres for AI applications](#). Nuclear power, even if expanded aggressively, cannot fill the gap within the necessary time frames.

Natural gas, by contrast, is abundant, flexible, low-risk—and highly affordable. It accounts for 40 percent of U.S. electricity generation and plays a critical role in Canada’s energy mix. Unlike nuclear, natural gas infrastructure can be built rapidly, ensuring that new capacity comes online when it’s needed—not decades later. Gas-fired plants are

cost-effective and capable of providing consistent, large-scale power while being capable of rapid starts and shut-downs, making them suitable for meeting both base-load and “peaking” power demands.

Climate-related concerns surrounding natural gas need to be put in perspective. Natural gas is the lowest-emission fossil fuel and produces less than half the carbon dioxide of coal per unit of energy output. It is also highly adaptable, supporting renewable energy integration by compensating for the intermittency of wind and solar power.

Nuclear energy advocates frequently highlight its zero-emission credentials, yet they overlook its immense challenges, not just the front-end problems of high cost and long lead times, but ongoing waste disposal and future decommissioning.

Natural gas, by comparison, presents fewer risks. Its production and distribution systems are well-established, and North America is uniquely positioned to benefit from the vast reserves underlying all three countries on the continent. Despite low prices and ever-increasing regulatory obstacles, Canada’s natural gas production has been setting new records. [Streamlining regulatory processes](#) and expanding liquefied natural gas (LNG) export capacity would help revive Canada’s battered economy, with plenty of natural gas left over to help meet growing domestic electricity needs.

Critics argue that investing in natural gas is at odds with the “energy transition” to a glorious net zero future, but this oversimplifies the related challenges and ignores hard realities. By reducing reliance on dirtier fuels like coal, natural gas can help lower a country’s greenhouse gas emissions while providing the reliability needed to support economic growth and renewable energy integration.

Europe’s energy crisis following the recent reduction of Russian gas imports underscores natural gas’s vital role in maintaining reliable electricity supplies. As nations like Germany still phase out nuclear power due to the sheer blind ideology of their left-wing parties,

they're growing more dependent on natural gas to keep the lights (mostly) on and the factories (partially) humming.

Europe is already a destination for LNG exported from the U.S. Gulf Coast, and American LNG exports will soon resume growth under the incoming Trump administration. Canada has the resources and know-how to similarly scale up its LNG exports; all we need is a supportive federal government.

For all its theoretical benefits, nuclear power remains impractical for meeting immediate and medium-term energy demands. Its high costs, lengthy timelines, and significant remaining public opposition make it unlikely to serve as North America's energy backbone.

Natural gas, on the other hand, is affordable, scalable, and reliable. It is the fuel that powers industries, keeps homes warm and provides the stability our electricity grid needs—whether or not we ever transition to “net zero.” By prioritizing investment in natural gas infrastructure and expanding its use, we can meet today's energy challenges head-on while laying the groundwork for tomorrow's innovations.

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Gwyn Morgan

Author

Gwyn Morgan devoted three decades to building North America's leading oil and gas company. When he stepped down as founding CEO in 2006, EnCana Corporation had an enterprise value of approximately \$60 billion. Gwyn has served as a director of five global corporations including HSBC. He was appointed a Member of the Order of Canada in 2011.

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