

DOCKETED

Docket Number:	17-IEPR-04
Project Title:	Natural Gas Outlook
TN #:	221397
Document Title:	MEETING SCHEDULE 2017 IEPR Workshop on Draft Natural Gas Outlook Report
Description:	10.09.2017: MEETING SCHEDULE: 2017 IEPR Workshop on Draft Natural Gas Outlook Report
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Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	10/5/2017 1:34:09 PM
Docketed Date:	10/5/2017



MEETING SCHEDULE: 2017 IEPR Workshop on Draft Natural Gas Outlook Report

Monday, October 9, 2017 – 10:00 AM

**California Energy Commission
First Floor – Rosenfeld Hearing Room
1516 9th Street, Sacramento, CA 95814**

(Listed times are general guidelines only.)

Introduction (10:00-10:05)

Heather Raitt, California Energy Commission

Opening Remarks (10:05-10:15)

Chair Robert B. Weisenmiller, Lead Commissioner for 2017 IEPR and Electricity and Natural Gas
Commissioner Karen Douglas, California Energy Commission
Commissioner Andrew McAllister, California Energy Commission
Matthew Coldwell, California Energy Commission

Presentations on the *Natural Gas Outlook* (10:15-10:25)

Jennifer Campagna and Leon Brathwaite, Energy Commission

Natural Gas Market Gas-Trade (NAMGas) Model Results (10:25-10:40)

Anthony Dixon, Energy Commission

Presentation on North American Natural Gas Supply and Demand (10:40-10:55)

George Wayne, Kinder Morgan

Natural Gas Demand Forecast for Power Generation (10:55-11:10)

Angela Tanghetti, Energy Commission

Presentation on a Natural Gas Imbalance Market (11:10-11:45)

Greg Lander, Skipping Stone

BREAK (12:00 – 1:00)

Panel #1: The Natural Gas Market: Present and Future (1:00-2:00)

Moderator: Jason Orta, California Energy Commission

- Michael Shaw, California Manufacturers and Technology Association
- Derek Jones, California Natural Gas Producers Association

Panel #2: Natural Gas Electricity Market Coordination and Natural Gas Storage (2:00-3:00)

Moderator: Jason Orta, California Energy Commission

- Greg Lander, Skipping Stone
- Kevin Conneighton, Central Valley Gas Storage LLC

Public Comments

Closing Remarks

Adjourn

Panel Discussion Questions

Panel #1

General

- Where do you see the market for natural gas going in the next 10 years?
- Are there issues of significance that are not included in the *Natural Gas Outlook* or *2017 Integrated Energy Policy Report (2017 IEPR)* relating to California's natural gas infrastructure, along with future natural gas supply and demand?

Natural Gas Production

- Over the next 10 years, what is the future of natural gas production in California?
- Please describe the economic impact of natural gas production in California. Where in California is the strongest economic impact of natural gas production and which part of the state has the highest number of jobs in this sector?
- How do California natural gas producers control greenhouse gas emissions at existing and at capped production wells?

Natural Gas Demand

- How does natural gas fit into the current and future energy needs of agricultural, industrial, and other large customers over the next 10 years?
- For large customers, which fuels are realistic alternatives for natural gas heating and power generation? Do these substitutes include renewable gas or power to gas?
- Recently, portions of California's natural gas infrastructure have received repairs and upgrades with the aim of enhancing safety and reducing natural gas leakage. How have recent changes in additional state and federal regulations regarding natural gas infrastructure affected the market for natural gas customers' costs and reliability?

Panel #2

General

- Where do you see the market for natural gas going in the next 10 years?
- Are there issues of significance that are not included in the *Natural Gas Outlook* or *2017 Integrated Energy Policy Report (2017 IEPR)* relating to California's natural gas infrastructure, along with future natural gas supply and demand?

Natural Gas Electricity Market Coordination

- How can natural gas electricity market coordination be improved in the future?
- What changes in state and federal regulations would be needed to improve natural gas electricity market coordination? What lessons are there to be learned from PG&E's attempt to have its backbone system regulated by FERC instead of the CPUC in the 1990s and 2000s?
- Does California need an independent system operator for its natural gas system?
- Please discuss the idea of a natural gas imbalance market presented by Skipping Stone.

Natural Gas Storage

- In planning for phasing out the use of the Aliso Canyon storage facility within ten years, what policies and specific programs should the California Energy Commission consider?
- In planning for the proposed phasing out of PG&E's Los Medanos and Pleasant Creek natural gas storage facilities, what policies and specific programs should the California Energy Commission consider?
- How does PG&E's proposed retirement of the retiring its Los Medanos and Pleasant Creek storage facilities affect independent storage facilities?
- Over the next ten years, what do you see for the future of California's natural gas infrastructure including pipelines and storage facilities?
- How have recently enacted laws Senate Bill 380 (Pavley, Chapter, 14, Statutes of 2016) and Senate Bill 887 (Pavley, Chapter 673, Statutes of 2016) affected independent natural gas storage facilities?
- How have emergency regulations promulgated by the Division of Oil, Gas, and Geothermal Resources (DOGGR) affected the operations of independent natural gas storage facilities?
- How would proposed DOGGR regulations affect the operations of independent natural gas storage facilities?