



California Energy Commission

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2013 Integrated Energy Policy Report Lead Commissioner Natural Gas Issues, Trends, and Forecast Scenarios Workshop

Wednesday, July 17, 2013 10:00 a.m.
1516 Ninth Street, Hearing Room A
Sacramento, California

AGENDA

For directions, please go to:

<http://www.energy.ca.gov/commission/directions.html>

Welcome and Introductions

Commissioner Andrew McAllister, *IEPR Lead and Natural Gas Lead*
Suzanne Korosec, *IEPR Lead*

Workshop Overview

Ivin Rhyne, *Energy Commission*

Morning Session: Changes in Gas Demand and its Effects on Gas Infrastructure

Forecast Scenarios:

- Natural Gas Use for Electric Generation – PLEXOS . Angela Tanghetti, *Energy Commission*
- Common Case Scenarios: Robert Kennedy, *Energy Commission*
- Policy and Market Development Scenarios: Peter Puglia, *Energy Commission*

Panel 1 Discussion: Moderator: Ivin Rhyne

- **Dorthy Rothrock**, *California Manufacturers and Technology Association*
- **Chris Ellsworth**, *FERC*
- **George Wayne**, *Kinder Morgan*
- **Chris Fan** *PG&E*
- **Dede Subakti**, *CAISO*
- **Erica Bowman**, *America's Natural Gas Alliance (ANGA)*

Panel Questions: Moderator: Ivin Rhyne

- How will changes in industrial demand patterns create new stresses on the existing infrastructure?
- How will additional demand in Mexico affect California gas users?
- How much LNG export capabilities do panelists expect to be approved? What are the expected effects of LNG exports on NA markets?
- How will the carbon emissions standard proposed by President Obama for electric generation change the demand for gas nationwide? Within WECC?
- What levels of CHP and gas-fired DG penetration will require upgrades to the gas distribution system?

- What changes in natural gas infrastructure will be needed to support natural gas vehicle demand?
- How will the San Onofre nuclear plant retirement affect NG demand and future infrastructure decisions?
- What changes in the gas nomination framework (additional nomination window, etc.) might be needed to support further integration of renewables?

Lunch Break

Afternoon Session: Gas Supply Trends and Issues Panel

Forecast Scenarios:

- Shale Development Scenarios: Leon Brathwaite, *Energy Commission*

Panel 1 Discussion: Moderator: Ivin Rhyne

- **Terry Rivasplata**, *ICF*
- **Tim Kustic**, *DOGGR*
- **George Wayne**, *Kinder Morgan*
- **Chuck White**, *Waste Management*
- **Bevin Hong, Jr.**, *TransCanada*

Panel Questions:

- Under what circumstances do panelists foresee development of the Monterey Shale in CA for the purposes of gas extraction (beyond the current oil extraction)?
- What role will seismic and water issues play in the decision to develop the Monterey shale?
- To what extent will the producers of natural gas become secondary to the extraction of other products that produce gas as a byproduct (such as oil, other gaseous liquids, etc)?
- What do the panelists believe will be the regulatory landscape for shale development the next 10-20 years?
- What role will biogas play in California's gas supply portfolio?
- How might Cap and Trade affect the supply regime for natural gas in CA?

Public Comment

Closing Remarks

Adjourn