



IECA MEETING AGENDA

Location:

**Le Méridien Arlington
Vivace Conference Room
1121 19th Street North
Arlington, VA 22209
(703) 351-9170**

TUESDAY, NOVEMBER 13, 2018

7:30 AM – COFFEE SERVICE (will be provided)

8:00 AM – 8:15 AM – Darren MacDonald, Director, Energy and Environment, Gerdau, Chairman of IECA

Subject: Welcoming remarks, review of agenda, and anti-trust compliance statement.

8:15 AM – 8:45 AM – Paul Cicio, President, IECA

Subject: Implications of the November 2018 midterm elections on electricity, natural gas, environment, and climate change issues. FERC, DOE, White House, CFTC, and EPA updates. Top 2019 policy issues.

8:45 AM – 10:00 AM – Andrew Weissman, CEO, EBW Analytics

Subject: Natural gas demand, supply, and price forecasts. Special focus on implications of delayed pipelines, impacts to basis pricing and increased LNG/exports to Mexico. Breakeven costs of producing natural gas.

10:00 AM – 10:15 AM – BREAK

10:15 AM – 11:30 AM – Natural Gas: State of the Market – Risks, Opportunities, and Policy Issues

Facilitator: Lloyd Webb, Director, Commercial Energy, Olin Corporation

Topics:

1. Status of pipeline build-out, including impact of delays and cancellations.
2. Top issues regarding natural gas/electricity interface, and future of gas generation in resource mix.
3. Implications of 9.5 Bcf/d of LNG exports by 2019 and increased shipments to Mexico.
4. Impact of all-of-the-above on natural gas commodity and natural gas transportation pricing nationally and regionally.
5. Actions that industrials can take.

Panelists:

- Rob McKim, Vice President, Amerex Energy Services
- Robert Ellis, Vice President, Sales & Origination, CenterPoint Energy Services
- Aubrey Hilliard, President, Carolinas Division, TEXICAN Natural Gas
- Mary Hensley, President & Director of Marketing, Enspire Energy

11:30 AM – 12:00 PM – Mike McKenna, President, MWR Strategies

Subject: Implications of the November 6 election on Congress and the Administration.

12:00 PM – 1:00 PM – LUNCH (Sponsored by Calpine Energy Solutions)

Location: Adagio Room @ Le Méridien Arlington

1:00 PM – 2:15 PM – Richard M. Redash, Head of Research, North American Gas & Power, Analytics, S&P Global Platts

Subject: Electricity supply, demand, and price forecasts. Natural gas production breakeven points.

2:15 PM – 2:30 PM – BREAK

2:30 PM – 3:30 PM – Electricity: State of the Market – Risks, Opportunities, and Policy Issues

Facilitator: Michael Peters, Manager, Energy, Linde

Topics:

1. FERC order/PJM's jump ball filing and where that may take competitive markets.
2. State of the electric market. Dynamics of generation, transmission, demand, and prices.
3. Winter outlook. Fuel security debate and ability to get natural gas on peak days.
4. Demand response: trends, options, and technology.

Panelists:

- Jeff Bush, Vice President, National Accounts, Calpine Energy Solutions
- Paul Super, Sales Manager, National Key Accounts East, Direct Energy
- Frank Frederickson, Vice President - Customer Experience, Minnesota Power
- Katie Guerry, Vice President, Regulatory Affairs, Enel X

3:30 PM – 3:45 PM – BREAK

3:45 PM – 4:30 PM – Renewable Energy: State of the Market – Risks, Opportunities, and Policy Issues

Facilitator: Dave Ciarlone, Sr. Manager, Energy and Carbon Strategy, Arconic

Topics:

1. What are the opportunities/options for industrials?

Panelists:

- Robert Michalczak, Director, Business Development, NextEra Energy
- John Martin, Client Development Manager, Strategic Renewables, Schneider Electric
- Jereme Kent, General Manager & CEO, One Energy Enterprises LLC

- Rob Martine, Director of Origination, Clearway Energy

4:30 PM – 5:00 PM – Matthew Butts, VP, Business Development, EDF Energy Services; Thomas Leyden, Senior Director Distributed Solutions, EDF Renewables; and Felix Aguayo, Director Distributed Solutions, EDF Renewables

Subject: Energy storage, state of the market, and industrial applications.

5:00 PM – 6:00 PM – Cocktail Hour (sponsored by CenterPoint Energy and One Energy Enterprises LLC)

Location: Vivace Foyer @ Le Méridien Arlington

WEDNESDAY, NOVEMBER 14, 2018

7:30 AM – COFFEE SERVICE (will be provided)

8:00 AM – 8:15 AM – Paul Cicio, President, IECA

Subject: Opening remarks.

8:15 AM – 9:15 AM – Electric Transmission Costs

Subject: The objective of this session is to discuss concerns of increasing transmission costs.

Speakers:

- Catherine Jereza, Deputy Assistant Secretary, Transmission Permitting & Technical Assistance, U.S. Department of Energy
- Anna Cochran, Director, Office of Market Regulation, Federal Energy Regulatory Commission

9:15 AM – 9:45 AM – BREAK

9:45 AM – 10:15 AM – Paul Cicio, President, IECA

Subject: Climate change data (GHG emissions, global climate trends).

10:15 AM – 11:00 AM – Climate Change Panel

Facilitator: Paul Cicio, President, IECA

Topics: Carbon tax legislation (with and without dividend) has been introduced in the U.S. House and Senate. The panel will discuss the implications for 2019.

Panelists:

- David Bookbinder, Chief Counsel, Niskanen Center: H.R. 6463, the “MARKET CHOICE Act”
- Jan Mares, Senior Advisor, Resources for the Future: Update on “Framework Proposal for a U.S. Upstream GHG WTO-Compliant Border Adjustments”
- Greg Bertelsen, Senior Vice President, Climate Leadership Council

11:00 AM – 12:00 PM – Electricity Supply Panel – Needed Changes

Facilitator: Steve Lomax, Director, Environmental Regulatory Affairs, Koch Industries

Topics: Policy perspectives on FERC, Congressional, organized markets, state electricity/natural gas issues. Trends that are driving change (+/-).

Panelists:

- John McCaffrey, Regulatory Counsel, American Public Power Association
- John Shelk, President and Chief Executive Officer, Electric Power Supply Association
- Melissa Horton, Government Affairs Director, Southern Company

12:00 PM – Paul Cicio, President, IECA/Meeting Adjourned

Subject: Wrap up, topics, and speakers for next meeting.