

# 2018 Governor's Energy Summit

Cory Dennison, President, Vision Shared



**Cory Dennison**  
President/CEO

**Vision Shared is a  
501c3 non-profit**

- Economic Development
- Quality of Life
- Represents all of West Virginia
- Works closely with the West Virginia Development Office
- Founding member of the Tri-State Shale Coalition

# ABOUT THE TRI-STATE SHALE COALITION (TSSC)

Governors of PA, OH, and WV agreed to collaborate on development of natural gas and downstream development in the tri-state region — an agreement they renewed in 2018.



CLAUDE  
WORTHINGTON  
BENEDUM  
FOUNDATION



# WORKING TOGETHER



Pennsylvania Governor Tom Wolf  
“I’m proud to continue our successful collaboration with Ohio and West Virginia to ensure that we are doing everything we can to support additional development – and the jobs and economic growth that go with it – in a region with an unprecedented natural resource.”

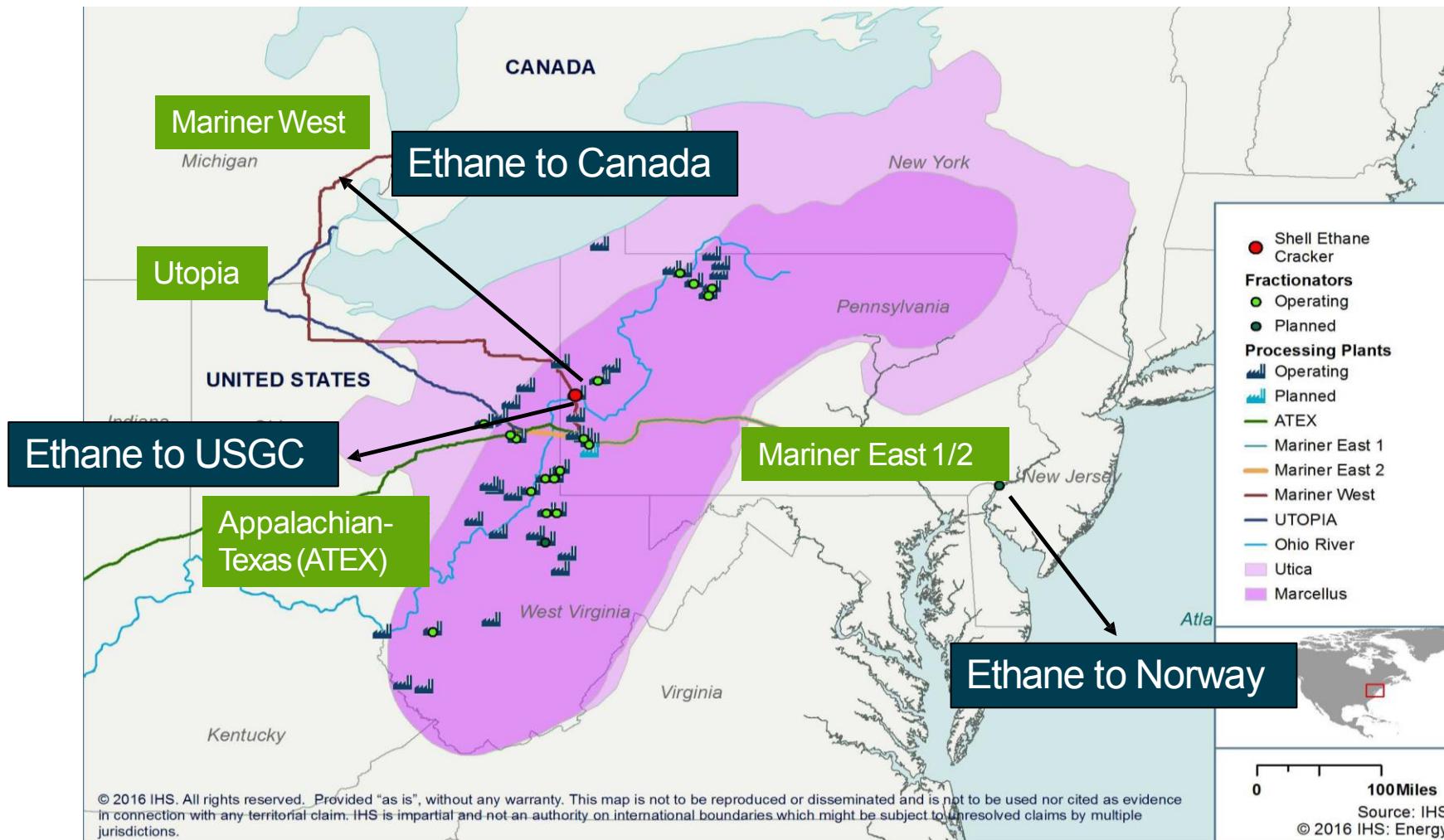


Ohio Governor John Kasich  
“[We] will continue to discuss ways to cooperate in marketing efforts to attract new businesses, strengthen workforce development programs, spur investments in expanding infrastructure and delivery of natural gas and liquids, and encourage its academic institutions to expand and collaborate on research.”



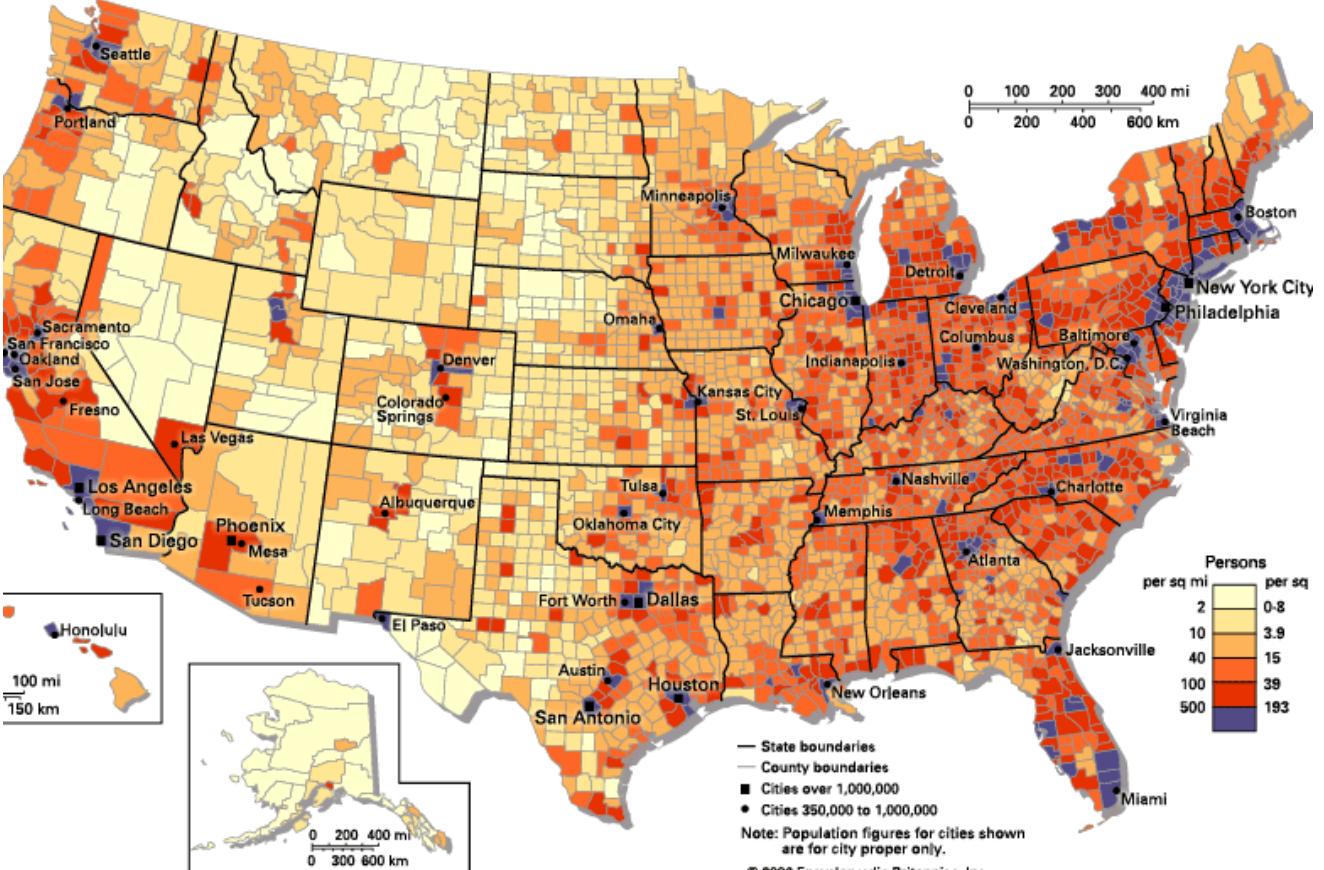
West Virginia Governor James Justice  
“Instead of competing, our three states are working together to promote the region as a center for shale-related manufacturing...We are encouraging chemicals and plastics manufacturers to come here, stay here and grow here with us in the Appalachian region.”

# MARCELLUS & UTICA NGL INFRASTRUCTURE

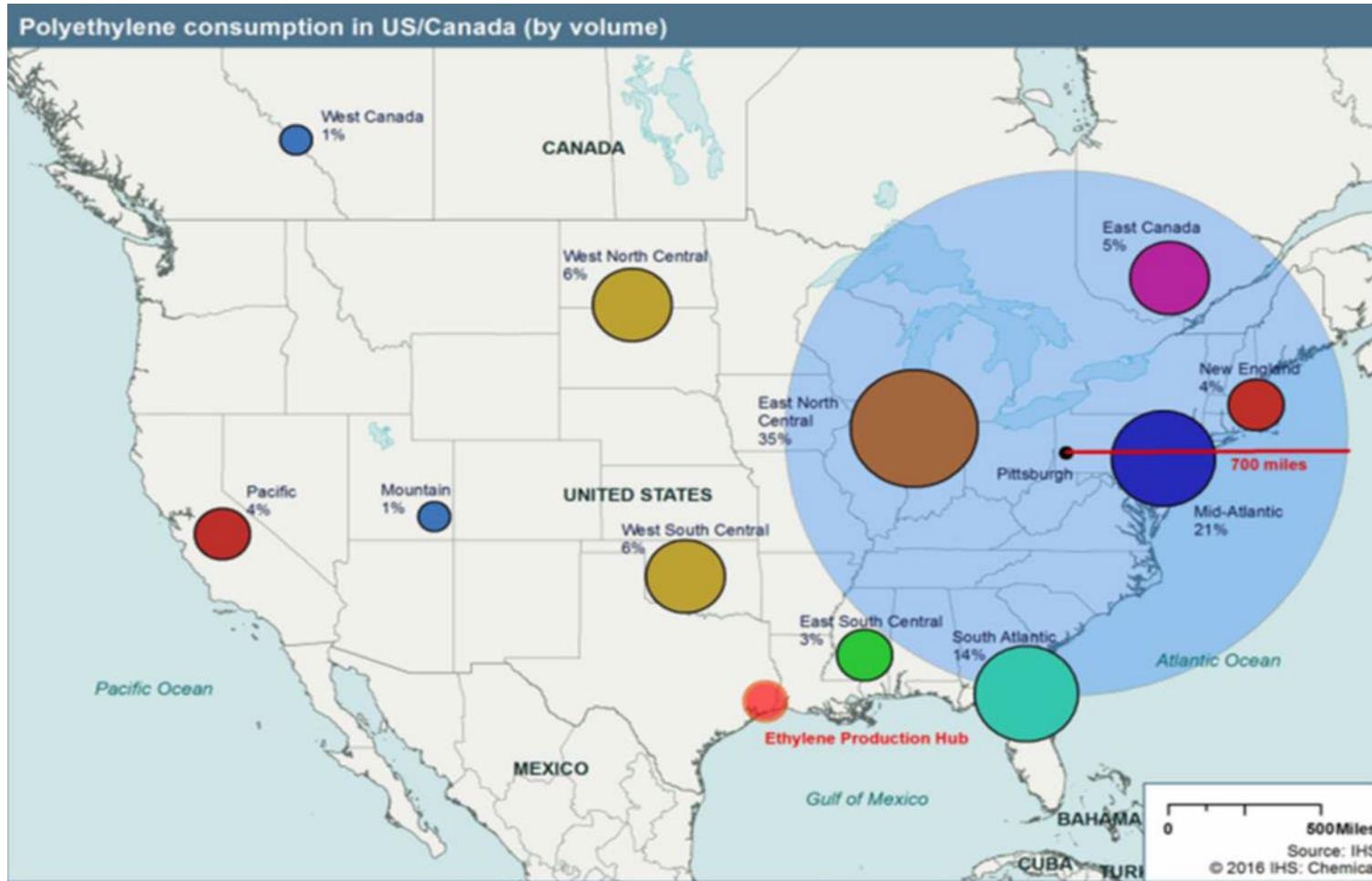


# Access to Markets-

- A Day Drive from WV to 65% of US population
- A Day Drive from Manufacturing facilities in WV to industrial markets in the USA
- Detroit, Cleveland, Baltimore, Washington, New York, Philadelphia, Atlanta, Charlotte, Indianapolis, Chicago, St. Louis, Pittsburgh.



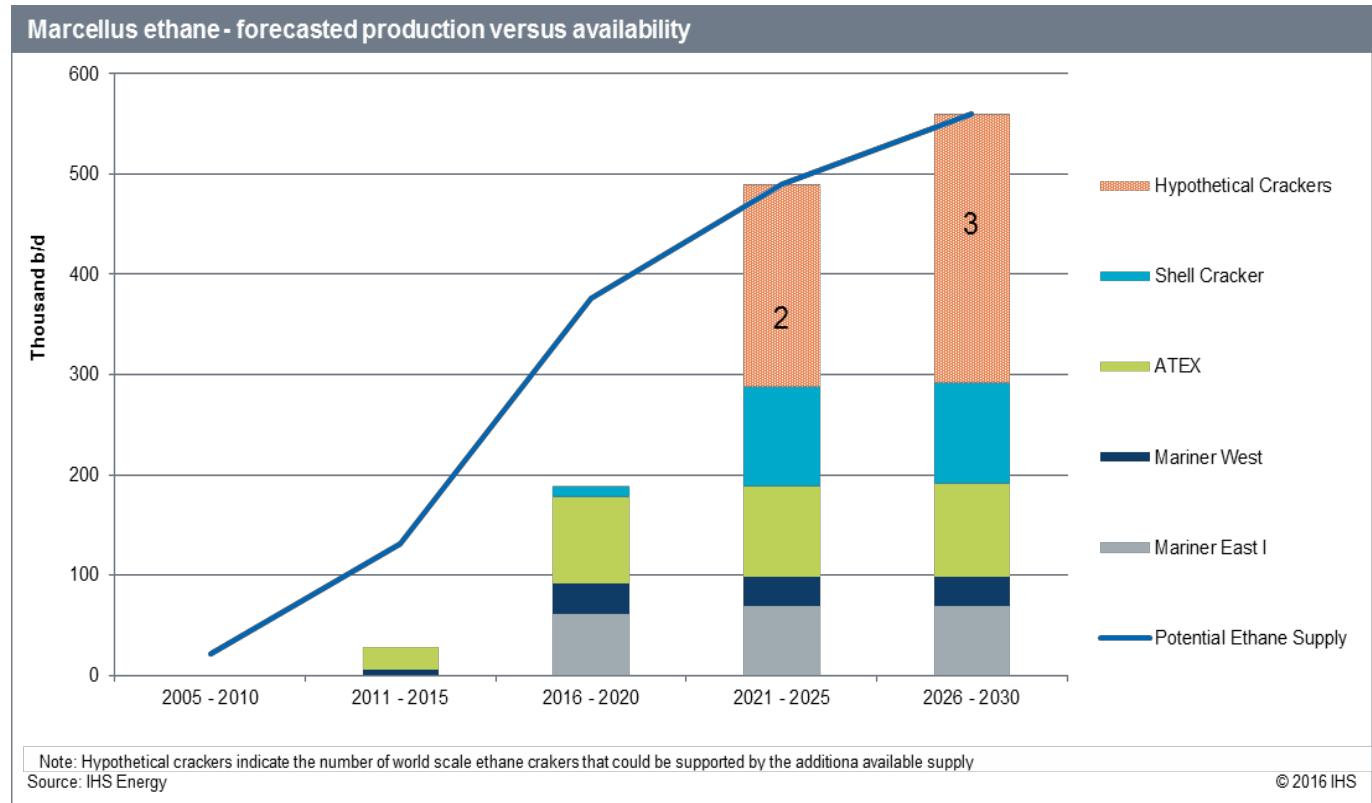
# US & CANADIAN POLYETHYLENE CONSUMPTION



# IHS MARKIT REPORT

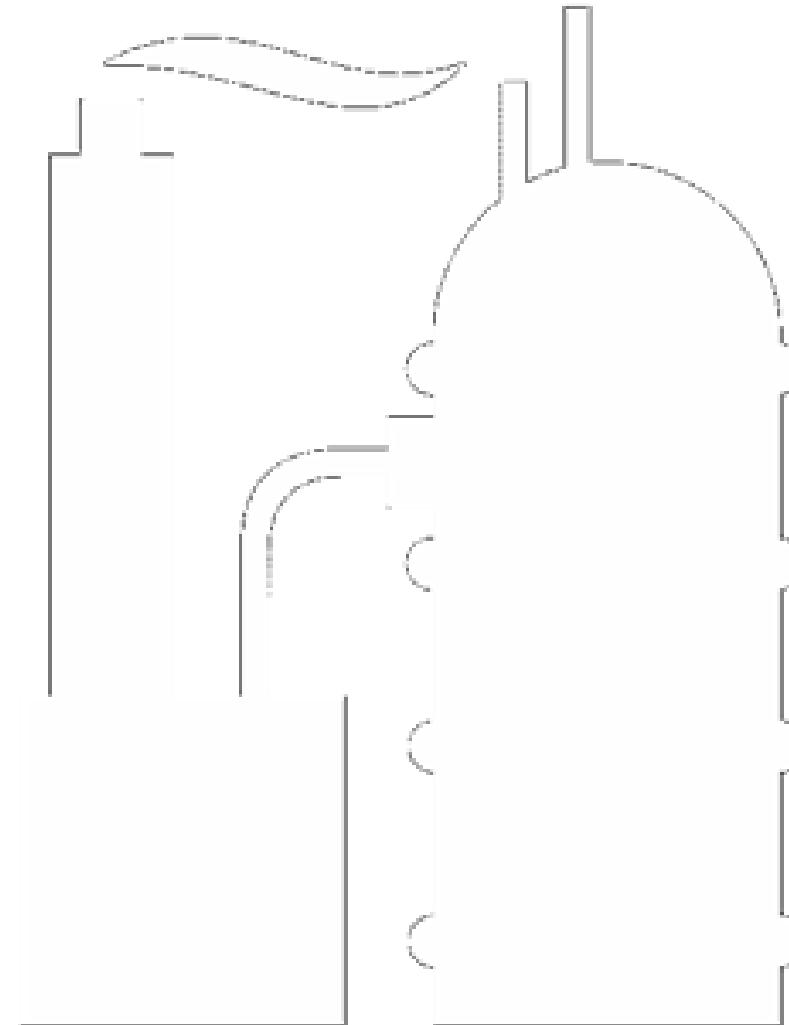
PA's IHS Markit Report estimates enough ethane remaining in the Marcellus to support three additional world-scale ethane crackers.

There is enough ethane in the Utica to support one additional ethane cracker.



# Boutique Manufacturing

- Smaller manufacturing
- 15-65 employees
- 10-120 million in investment
- Benefiting from cheap Ethane, propane, methane
- manufacture a variety of products –
- Chemical, petro-chem, lubricants, additives

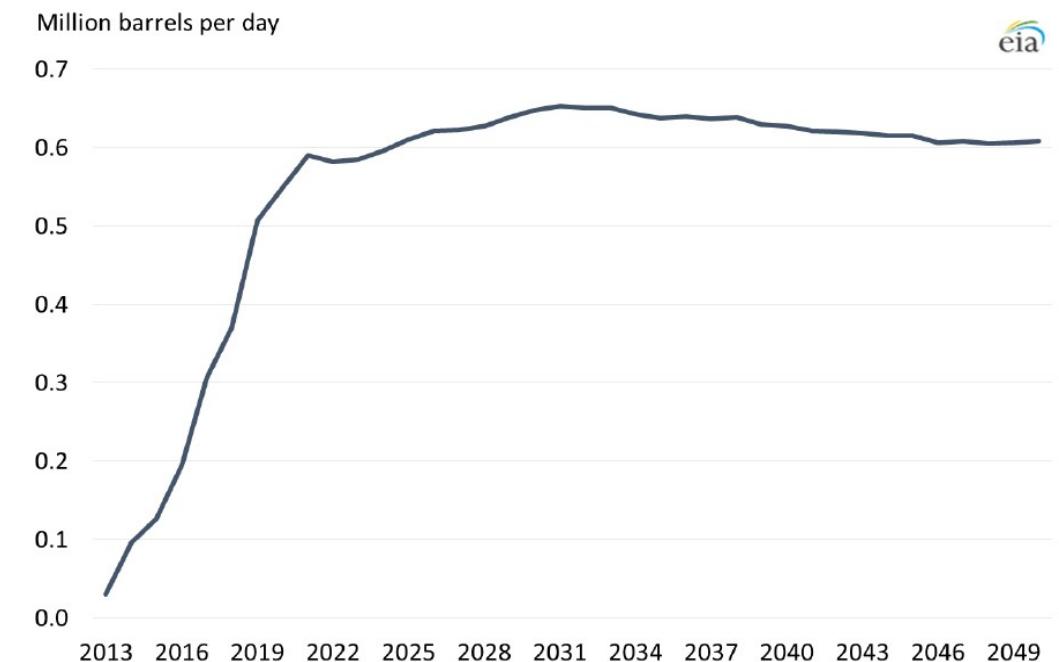


# COULD THE APPALACHIAN BASIN BE THE NEXT SILICON VALLEY OF AMERICAN ENERGY INFRASTRUCTURE?

*-Energy in Depth, September 2017*

- Staggering Appalachia NGL production growth expected in the years to come
- Appalachia NGL infrastructure is keeping pace, but storage is needed to maximize local use.
- ACC has found that by addressing NGL storage the region could see up to 100,000 permanent jobs.
- Storage will also help keep ethane and propane in the United States and, more specifically, in the Appalachian region.
- Region needs 30 million barrels of NGL storage at full development

**Figure 8. Appalachia Ethane Production<sup>15</sup>**

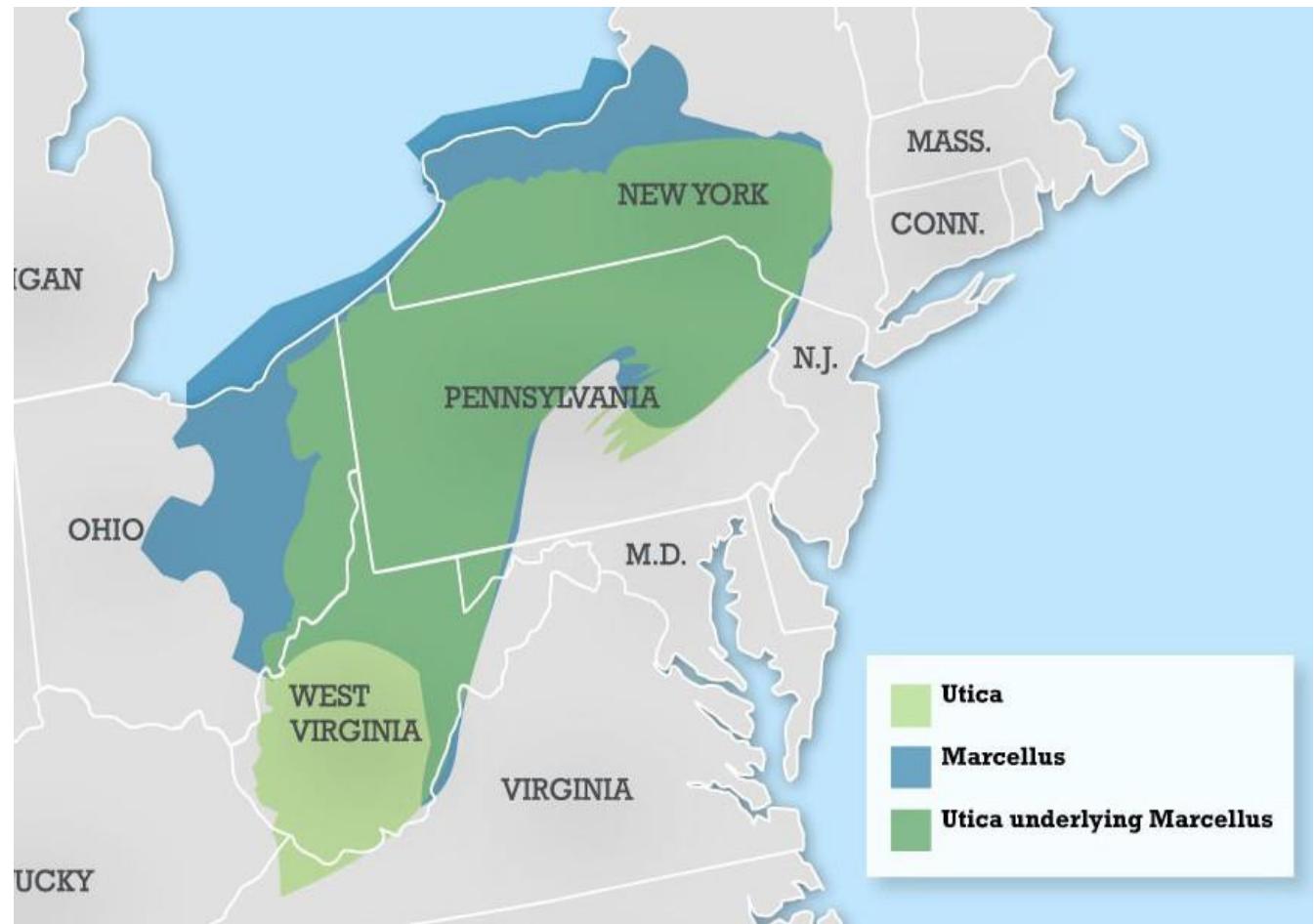


# COLLABORATION



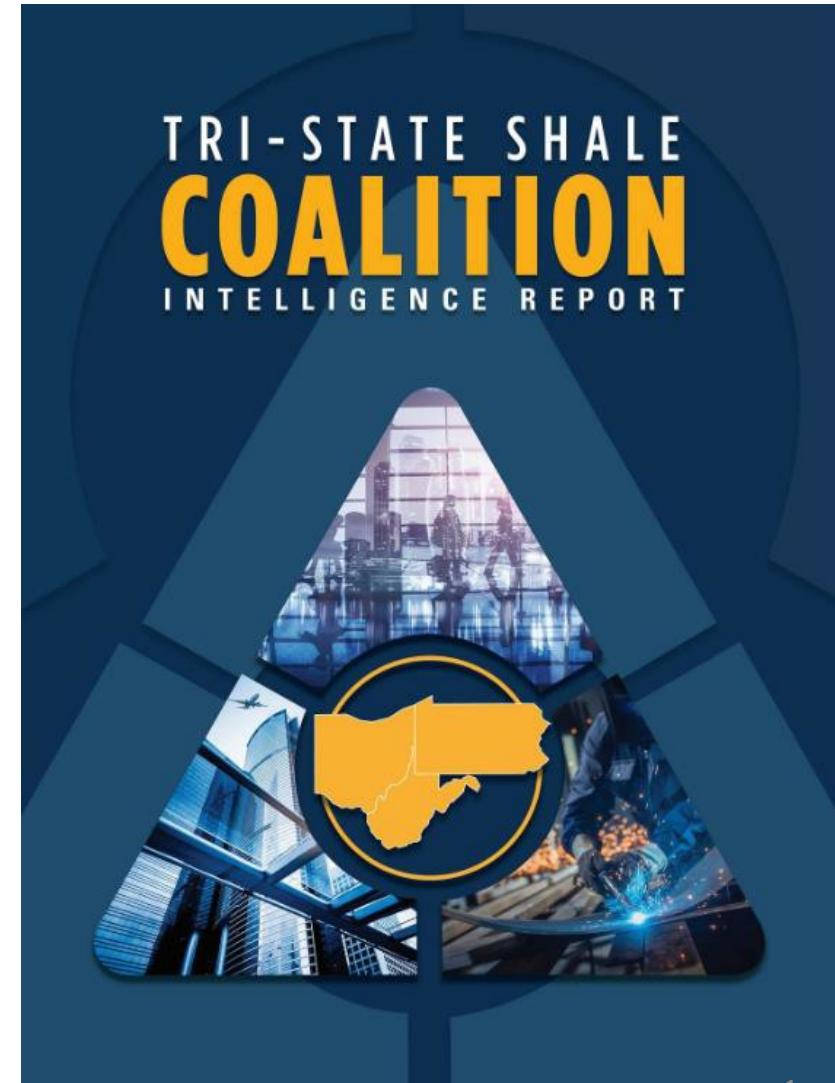
PA, OH & WV will work  
collaboratively on issues regarding:

- Marketing the Region
- Transportation & Infrastructure
- Workforce
- Research, Innovation,  
Commercialization



# MARKETING THE REGION

- Presentations
- Outreach
- Official Brand
- Energy & Downstream Intelligence Report in Site Selection Magazine (January 2018)
- National Media Familiarization Tour (April 2018)



# DEVELOPING A BRAND

- Conducted research and material audit
- Conducted customer/stakeholder interviews
- Narrowed down to four positioning areas:
  - Economics
  - Proximity
  - Convergence
  - Next/Future/Forward





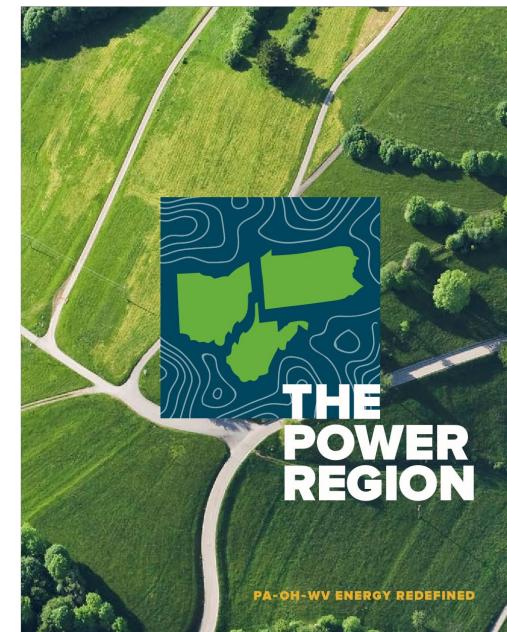
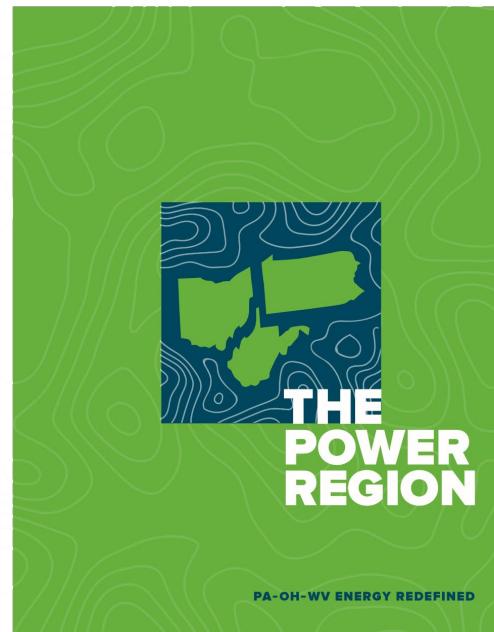
# THE POWER REGION

PA-OH-WV ENERGY REDEFINED



**PROXIMA NOVA**

AABbCcDdEeFfGgHhIiJjKkLlMmNnOoPpQqRrSsTtUuVvWwXxYyZz  
1234567890





LEAGUE GOTHIC

AaBbCcDdEeFfGgHhIiJjKkLlMmNnOoPpQqRrSsTtUuVvWwXxYyZz  
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Potential  
Branding for  
the POWer  
Region

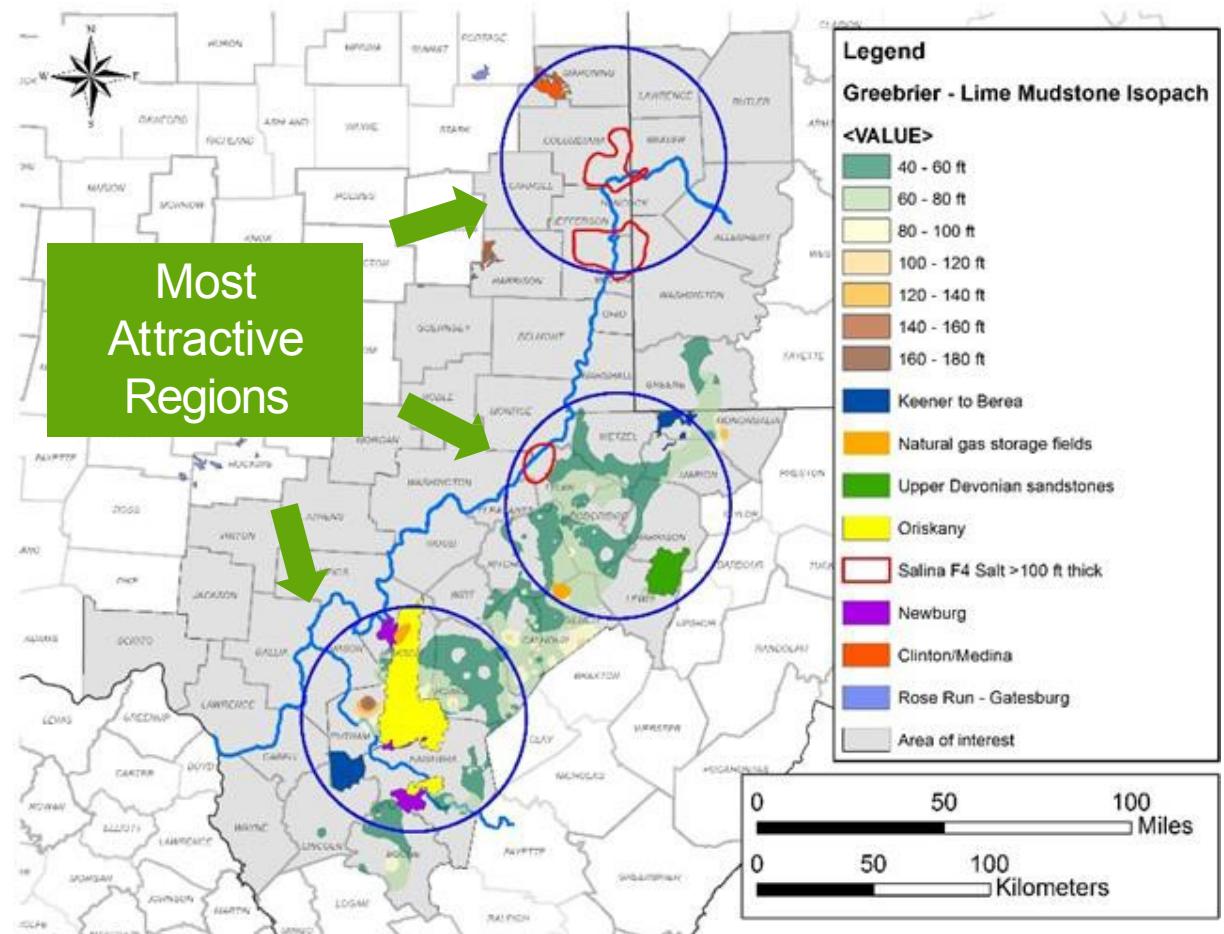
# DEVELOPING A BRAND

- Several options have been developed
- Currently discussing final options with stakeholders and developing taglines that will encompass the new brand
- New brand will be implemented within the next few weeks



# TRANSPORTATION & INFRASTRUCTURE

- TSSC sponsored joint study with OH, PA, & WV Geological Surveys to identify potential storage hub locations
- Exploring engagement strategies with industry and government groups on understanding key transportation and infrastructure issues



# TRANSPORTATION & INFRASTRUCTURE

- Developing natural gas liquids storage hub by securing \$2.5 billion federal loan guarantee through Department of Energy
- Storage will be developed in a phased build out, starting with 8 to 10 billion barrels
- Pipeline build out is expected to be 400 miles

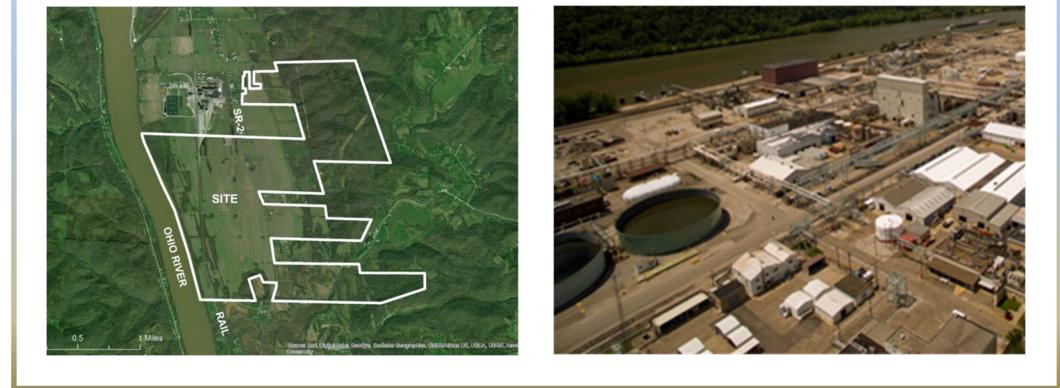


# Regional List of Industrial Sites

Access is Key

## Transportation and Infrastructure

- Comprehensive list of Industrial sites
- Promotion of Industrial ready sites
- Kanawha County West Virginia has a list of 72 industrial site
- Flat land, water, access to gas, access to rail, access to four lane roads



# WORKFORCE

Working closely with TEAM\* Consortium to develop new and seamless systems for companies and workers to:



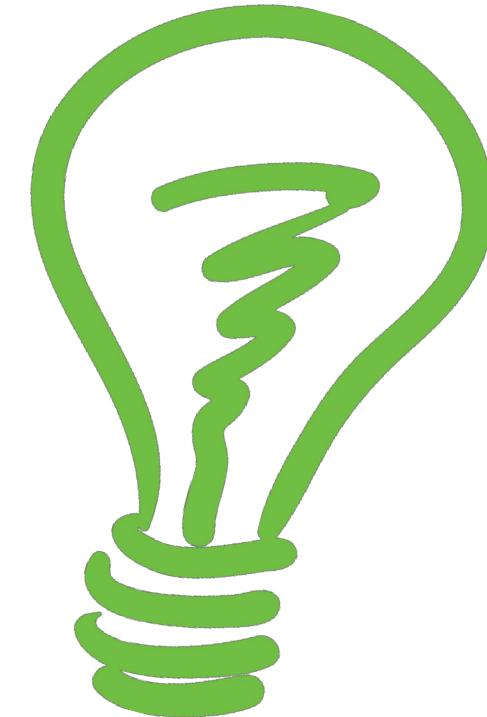
- Recognize what knowledge and skills employers will need for in-demand occupations
- Share information with education and training partners
- Share the development and delivery of relevant curricula across state and institutional boundaries (32 COUNTIES)
- Raise awareness and understanding of types of available jobs
- Connect students and trainees with internships, apprenticeships, and jobs

\*Tri-State Energy & Advanced Manufacturing Consortium

# RESEARCH, INNOVATION, & COMMERCIALIZATION

In addition to developing an MOU CMU and CWRU, encouraging academic institutions to expand collaborative research efforts that identify broader and environmentally-appropriate end uses of natural gas and NGLs, including:

- Electricity generation
- Liquid fuel
- Feedstocks for petrochemicals
- Alternative transportation fuels
- Heating applications



Thank You  
Cory Dennison  
President/CEO

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