



New Mexico Energy Roadmap

A Guide to Achieving a More Resilient Energy Economy

WATER AND NATURAL RESOURCES COMMITTEE, July 26, 2018





Energy Roadmap Origin

- ▶ In 2016, the Energy Conservation and Management Division (ECMD) received funding to develop an energy roadmap over a two-year time period.
 - ▶ Goal: Strengthen and diversify New Mexico's energy economy to be resilient to global changes.
- ▶ In 2017, the Legislature passed Senate Joint Memorial 21, encouraging all state agencies to assist the development of the Energy Roadmap.
- ▶ ECMD contracted New Mexico First to conduct research, facilitation and early implementation.



Energy Roadmap Steering Committee

- ▶ The process to develop the Roadmap was inclusive and stakeholder-driven.
- ▶ A Steering Committee was created for the development of the Roadmap, including:
 - ▶ Individuals, organizations, industries, government and education
 - ▶ Nonpartisan, all sectors and interests within our state's energy economy





Energy Roadmap Subcommittees

▶ Five Topics

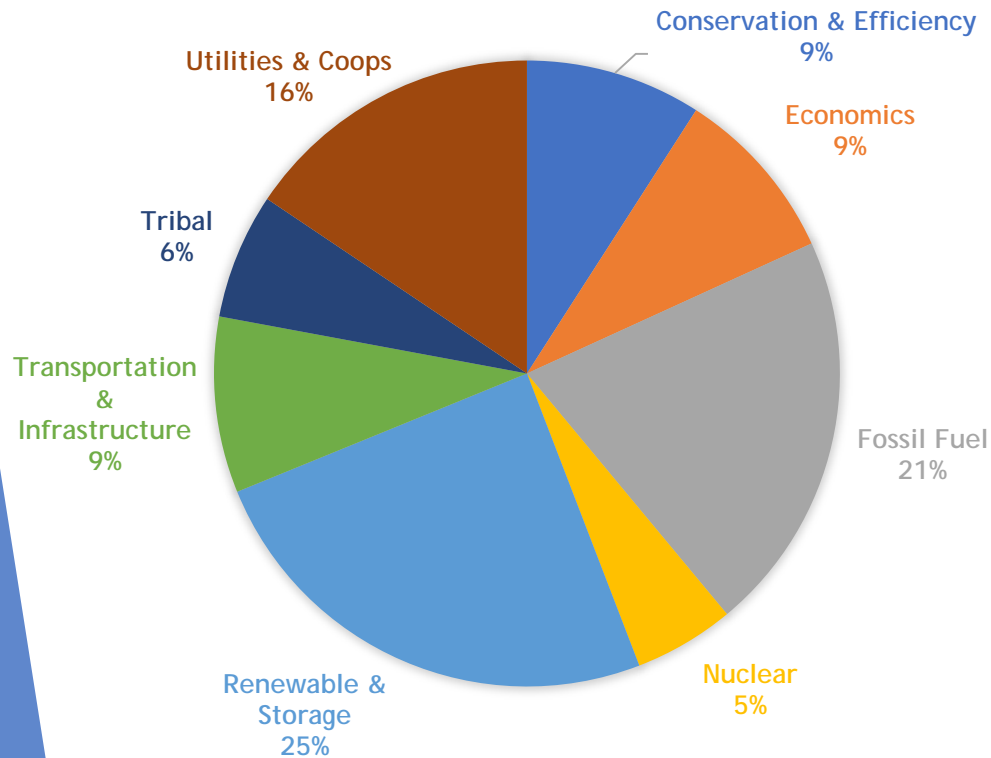
- ▶ Energy Economy Diversification
- ▶ Moving Energy
- ▶ Transportation
- ▶ Energy Efficiency
- ▶ Workforce and Education



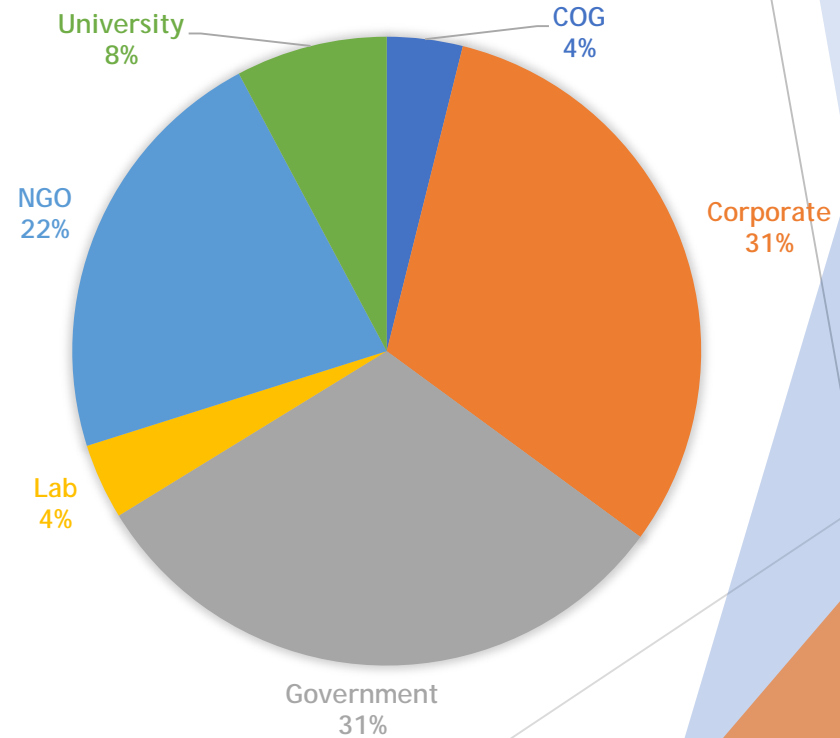
Energy Roadmap Steering Committee

Power in Diversity

ENERGY ROADMAP STEERING COMMITTEE
BY PRIMARY INTEREST



ENERGY ROADMAP STEERING COMMITTEE
BY ORGANIZATION TYPE

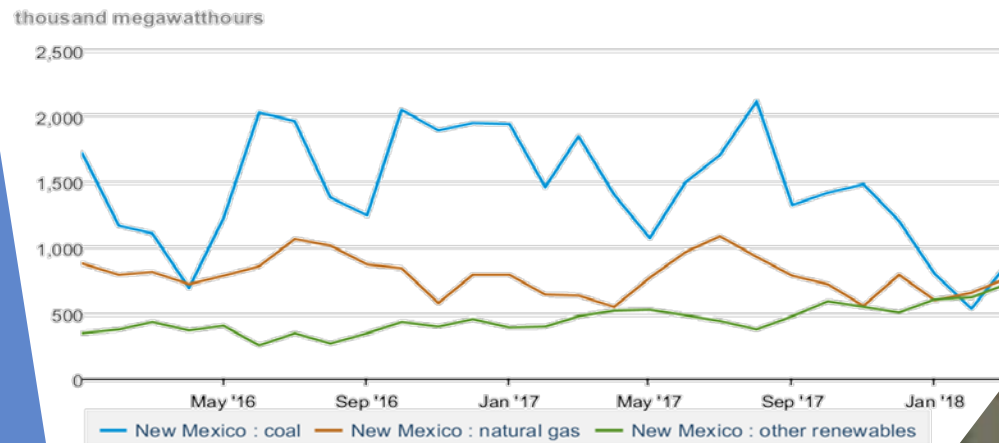


Goals and Strategies

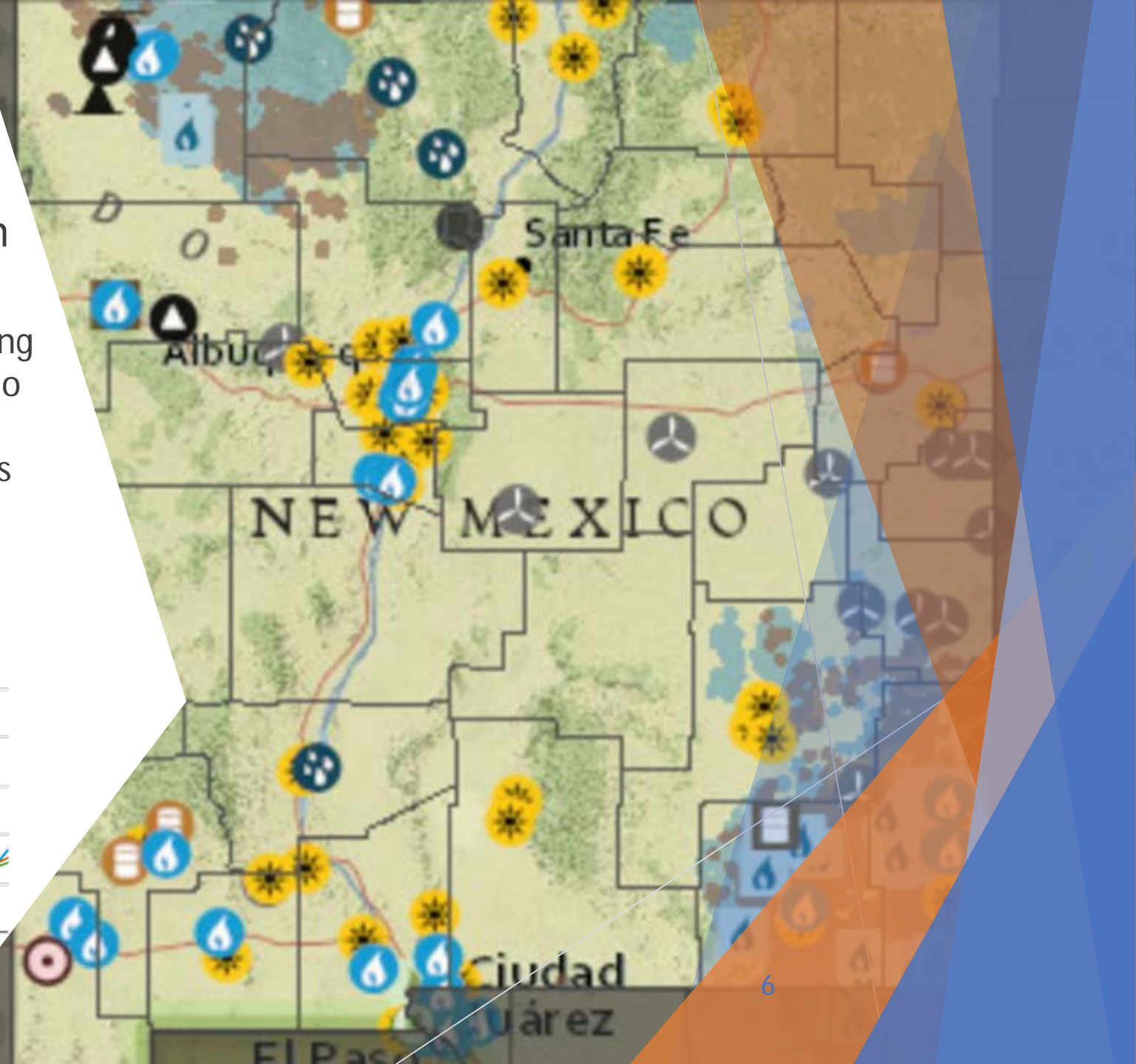
► Energy Economy and Diversification

- Diversifying and strengthening New Mexico's energy economy by diversifying its energy resources, turning waste into value and pursuing emerging energy technologies and value-added products from traditional energy sources

Net generation for all sectors, monthly



Data source: U.S. Energy Information Administration





Goals and Strategies

- ▶ Moving Energy
 - ▶ Optimizing electricity and natural gas transport to reduce waste
- ▶ Transportation
 - ▶ Reducing mobile source emissions by increasing use of alternative fuel vehicles and alternative forms of transportation



Goals and Strategies

▶ Energy Efficiency

- ▶ Improving energy efficiency through both physical and behavioral change

▶ Workforce and Education

- ▶ Removing access barriers, improving outreach and better aligning education and training programs with current and future energy workforce needs





New Mexico Energy Roadmap

More job displacement, small coal export market remains, new opportunities created through aggressive advanced manufacturing initiatives and enhanced transport

Renewable Energy production doubles, EUEA renewal holds EV load growth in check

Global peak oil (for energy) demand reached, value-added initiatives started 20 years earlier pays dividends.

Renewable energy exceeds 50% of NM generation mix, need for energy storage grows

Jobs created in new value-added manufacturing sector offsetting losses in other areas, peak oil demand reached in NM, O&G export market still growing

Begin Initiatives aimed at job training, incentivizing innovation and discouraging inefficiency and waste

Winter 2018 full electric power diversity, NM No.3 in U.S. oil production



Implementation

- ▶ The Energy Roadmap project is a living project that will evolve and progress with time.
- ▶ A re-evaluation of the Energy Roadmap project and the documents created for the project should be conducted on an annual basis by ECMD.
- ▶ The goals and strategies developed for the Roadmap have staggered start dates with end dates ranging from mid-2018 thru 2027.
- ▶ ECMD should continue to work with energy stakeholders and Strategy Leaders in the future to ensure the successful implementation of the Roadmap.





How can Legislators Help?

Support Initiatives that Promote Innovation and Reduce Waste in all energy sectors and provides a clear path forward for the energy industry to position New Mexico as a national energy leader.

- ▶ Energy Efficiency
- ▶ Energy Portfolio Standard
- ▶ Transportation and Value-added Products
- ▶ Education and Workforce
- ▶ State Energy Bill(s)?



2016 2017 2018 2019 2020 2021 2022 2023 2024 2025

Resources

▶ New Mexico Energy Roadmap Landing Page,
<http://www.emnrd.state.nm.us/ECMD/energyroadmap.html>

ALL

KEY DATES
DEADLINES

- ▶ View progress of roadmap implementation on our timeline
- ▶ Download the New Mexico Energy Roadmap final report
- ▶ Download the "Scenarios and Baseline" background report

▶ NMFirst.org

NM Energy Roadmap working group launched!

Jun 14, 2017

NM Energy Roadmap goals & strategies completed

Dec 7, 2017

NM Energy Roadmap released to the public

Feb 22, 2018

Scenarios and Baseline Report

Mar 13, 2018

GOAL 1: Advance strategies to strengthen New Mexico's overall energy economy by 2025

1.a. Create a workable mechanism to bring state, federal, tribal, and local authorities together to streamline regulatory processes

1.b. Advance a productive and predictable regulatory structure for the energy sector that guides industry and investment

1.c. Research tax reforms for NM that incentivize resiliency measures in the energy sector.