

Energy 2021

USA

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Overview of the current energy mix, and the place in the market of different energy sources

Due in large part to the COVID-19 pandemic, U.S. total energy consumption in 2020 is on pace to decline for a second straight year. Consumption in the first half of 2020 was 45 quadrillion British thermal units (Quads) compared to 50 Quads during the same periods in 2019 and 2018. For the entire year 2019, the U.S. consumed 100.3 Quads and produced 101.1 Quads.

Renewables

Wind and solar consumption in 2019 constituted 11 percent of electric generation, the same percentage as in 2018, but renewables have thus far bucked the overall trend of declining energy consumption in 2020. For the first time in the U.S., wind generated more electricity than coal for several days in the spring of 2020. Solar also increased in the first six months of 2020 from the same period in 2019.

Investor support for environmental, social, and governance (ESG) initiatives is growing in the electric utility sector. More than 20 investor-owned utility companies now have zero-carbon emission goals. In 2020, several new commitments were announced, and such efforts are frequently coupled with new investments in renewables.

Natural gas

Natural gas continued to be the largest power fuel source, accounting for 38 percent of electricity generated. U.S. natural gas production grew by 10 percent in 2019 to 111.5 billion cubic feet per day (bcf/d), an increase of 10.5 bcf/d over 2018. Appalachia remained the largest natural-gas-producing region, while production increased the most in the Permian Basin and Haynesville formations in Texas. Exports continued to rise as well, reaching new highs at the end of 2019 and the beginning of 2020. Consumption was down slightly through the first half of 2020 as economic activity slowed due to the pandemic, a trend that looks set to continue for the rest of the year.

Refined petroleum products

Liquid petroleum products continued to be the largest primary energy source in 2019, accounting for 37 percent of overall consumption. Consumption was up nearly 500,000 barrels per day (bpd) from 2017, due primarily to increased demand from the industrial sector. In 2019, the U.S. was the world's largest petroleum producer, with total field production in excess of 12 million bpd.

The Trump Administration continued to try to spur offshore oil exploration and production but has achieved only mixed results. In an election-year turnabout, President Trump imposed a 10-year moratorium on offshore drilling along the coasts of Florida, Georgia, South Carolina, North Carolina, and Virginia.

Coal

The rapid rise of renewables and the steady ascent of natural gas stand in contrast to the fate of coal. After constituting 23.5 percent of electricity generation in 2019, coal is projected to make up approximately 20 percent in 2020 after a sharp fall in demand in the first half of the year. Coal production is projected to decline by 26 percent in 2020.

Power plant closures continued in the unforgiving economic environment that predated the pandemic. In 2019, 10.6 gigawatts (GW) of coal-fired generating capacity was retired, including the largest coal plant in the western U.S., the 2.5 GW Navajo Generating Station, and a 1 GW unit at Paradise Fossil Plant.

Nuclear

Nuclear power provided 8 percent of primary energy in 2019, and its long-term outlook remains essentially unchanged. Through the first six months of 2020, production was down slightly.

The Trump Administration released a long-awaited report outlining strategies to revive uranium mining, spur research and development in advanced nuclear technologies, and grow exports of U.S. nuclear technology. Uranium prices rose sharply in the first half of 2020 following disruptions at several large uranium mines and facilities. The Department of Energy announced 10 years of funding for a small modular reactor startup whose development is already under way.

Changes in the energy situation in the last 12 months which are likely to have an impact on future direction or policy

Oil's twin supply and demand challenges

It is hard to recall that life in most countries was not affected by COVID-19 until late March 2020. Before the sheltering orders came down outside China, the oil industry was rocked by an excess of supply. The Organization of Petroleum Exporting Countries (OPEC), led by Saudi Arabia, had cooperated for some years with Russia and other producers in limiting supply in response to the growth in U.S. shale oil output. That cooperation stopped in the first quarter, leading to a sharp reduction in oil prices. Some supply cuts finally occurred in April and June, but not nearly enough to return prices to even their 2019 levels.

The travel and work restrictions then had a strong impact on demand for jet fuel and other products. The result was a further drop in prices, resulting in a credit crunch in the oil patch accompanied by bankruptcies, workouts, and rig count drops. Hopes for a recovery in the fourth quarter have been stymied by the ongoing sheltering orders. The U.S. Energy Information Administration (EIA) predicts a return of liquids product demand and higher prices in 2021.

Natural gas price differentials drive trade

Natural gas prices hovered at low levels in 2020 owing to decreased domestic demand. But the differentials between prices on different continents indicate that transactions can still be made on the right terms. Traders forecast a positive gas outlook over the next five years, both in the U.S. and internationally, putting many rigs back to work. A recent expansion in the number of liquefied natural gas (LNG) export facilities launched on the Gulf Coast can respond to the predicted needs of the Asian markets using relatively low-cost U.S. sources. A current export rate of 4.9 bcf/d is forecast to rise to 9 bcf/d in 2021.

Sea change in the renewables surge

The continuation of tax incentives, and existing and new state renewables mandates, drove a strong year for wind and solar despite the impact of the pandemic. The share of renewables

in power generation rose from 17 percent in 2019 to about 20 percent for 2020, *en route* to a 22 percent share forecast for 2021. 23.3 GW of wind capacity were added, as were 13.7 GW of solar capacity. Moreover, 2020 was a year in which a number of large organizations, including energy companies particularly in Europe but also in the U.S., signaled their alignment with various net-zero carbon emission goals for their overall portfolios.

Advanced energy storage is critical for growth of renewable generation, particularly for baseload application. The fourth quarter of 2019 saw 186 megawatts and 364 megawatt-hours of storage capacity added in the U.S. After an uneven 2020 owing to COVID-19 conditions, the sector is projected for considerable growth over the 2020–2026 period. Both behind-the-meter and utility scale storage are being pursued, leading in the Pennsylvania-Jersey-Maryland (PJM) and California Independent Service Operator (CAISO) regional transmission organization (RTO) territories, but expanding elsewhere. In addition to traditional pumped water, compressed air, and lithium-ion technologies, growth is expected in flow and sodium batteries for electricity storage and in a wide variety of types of thermal storage.

Hydrogen on the rise

2020 also saw the re-emergence of hydrogen in the energy transition discussion – both as a fuel and as a storage medium in raw form or in fuel cells. Governments and private actors are attracted to hydrogen’s promise to make use of intermittent renewable sources during times when the grid cannot use their output, and its energy density for many transportation and industrial applications. In the U.S., turbines capable of burning either or both natural gas and hydrogen are gaining appeal while the manufacturing, logistics and economic challenges are sorted out. The H2@Scale project at the University of Texas is drawing attention. The stage is set for the U.S. to join Europe and Asia in promulgating further incentives for the development of an integrated hydrogen economy.

Developments in government policy/strategy/approach

Offshore wind

The uptick in planned offshore wind and solar projects in the U.S. over the last few years has been driven in large part by state policies to increase renewable sources in their energy portfolios, including commitments to buy offshore wind power to achieve those goals. State commitments to buy offshore wind exceeded 25 GW as of April 2020.

The U.S. is on target to install a record amount of new renewable capacity in 2020, despite the ongoing COVID-19 crisis. In July 2020, New York formally opened the largest combined solicitation for renewable energy ever issued by a U.S. state, seeking over 4 GW from combined sources including solar and offshore wind. The state has a goal of generating 70 percent of its electricity from renewable sources by 2030 and developing at least 9 GW of offshore wind by 2035.

However, state policy approaches towards offshore wind projects and other renewables have been countered by mixed signals from the Trump Administration and delayed federal permitting. The Vineyard Wind project off the coast of Massachusetts was unexpectedly delayed in 2019 by the federal government’s decision to require a cumulative impact review for offshore wind projects along the Northeastern Atlantic coast. Many industry commentators have raised renewed questions about the federal government’s support for the sector. The Vineyard Wind project was expected to be the first full-scale offshore wind project to be permitted in the U.S. In June 2020, the Bureau of Ocean Energy Management (BOEM) released the Supplemental Cumulative Environmental Impact Review, which identified both significant impacts and benefits from offshore wind. BOEM states that it

expects to complete a final environmental review of the project by the end of 2020, and the developer estimates permitting of the project will be complete in March 2021.

Although BOEM indicated in April 2020 that it did not anticipate any schedule slips in its permitting of offshore wind proposals for the year, at least one other major project – the Skipjack project – announced a one-year delay in 2020. In its public filing, the company reported that the delay was due to BOEM’s starting the NEPA review process later than originally anticipated.

Advocates for offshore wind are also targeting areas off the coast of California for future projects. The Department of Defense has objected to development of many identified sites, citing interference with military radar and other activities that include live-fire exercises. Over the last year, military officials have joined a working group with California legislators and agencies to assess the issue, but most analysts agree federal leadership will be an essential factor before wind projects off the coast of California can become a reality.

Environmental justice in project siting

Environmental justice considerations are increasingly becoming a focus for many agencies responsible for issuing energy project permits, including state air boards, local government zoning councils, and federal agencies such as EPA and FERC. In January 2020, a federal appeals court found that Virginia’s Department of Environmental Quality violated state law when it failed to adequately consider environmental justice issues relating to the siting of a compressor station along the Atlantic Coast pipeline’s planned 600-mile route. The pipeline had selected a site for its compressor station in Union Hill, a rural and historically African-American community in Virginia. The plaintiffs contended that the station would be located just yards from some residents’ homes and would unreasonably expose the community members to air pollution and noise. Following this decision and other legal setbacks, the developer announced in July that it was cancelling the project due to the “ongoing legal uncertainties facing the project”.

In September 2020, New Jersey’s governor signed legislation that some consider to be the most restrictive environmental justice rules in the U.S., regarding how or if certain facilities can be built in “overburdened communities”. The law applies to new or expanded pollution-emitting facilities such as power plants and requires the state’s Department of Environmental Protection to evaluate environmental and public health impacts when reviewing permit applications. Other states are considering or have implemented similar measures. For example, Colorado preliminarily approved new rules in October that require new oil or gas well permitting to consider proximity to minority and low-income residents.

Developments in legislation or regulation

Methane rule rollback

The long-planned repeal of certain Obama-era methane rules relating to oil and gas producers and midstream facilities was finalized by EPA with the publication of two final rules in September 2020. The new rules eliminated new source performance standards (NSPS) for methane, relaxed volatile organic compound (VOC) and methane leak detection and repair requirements for oil and gas producers, and removed transmission and storage facilities from VOC and methane regulation entirely. The replacement rules also eliminated certain federal recordkeeping and reporting requirements that industry had argued were duplicative of state reporting and therefore unnecessary. Within days of publication in the *Federal Register*, 20 states and the District of Columbia, as well as numerous environmental groups, sued EPA, arguing that the rules were arbitrary and violated the Clean Air Act by abdicating EPA’s responsibility to regulate methane emissions from the oil and gas sector. A federal appeals

court temporarily stayed implementation of the new rules pending further court proceedings, but lifted the stay in late October 2020. The lawsuits remain pending before the court.

While EPA was finalizing its methane rule rollbacks, the Department of the Interior's Bureau of Land Management (BLM) was in court defending its attempt to rescind Obama-era methane regulation relating to oil and gas production on federal lands. In July 2020, a federal court struck down BLM's attempt to finalize its "rescission rule", which aimed at overturning the methane waste prevention rule put into place by the prior administration. The court found that BLM ignored its statutory mandate under the Mineral Leasing Act and failed to justify numerous reversals in the agency's prior policy positions and scientific findings.

State initiatives and federal incentives

State mandates have been essential to the renewables surge in the U.S. The Uniform Law Commission estimates that half the growth in wind and solar energy since 2000 has been attributable to renewable portfolio standards, procurement goals, and similar programs.

The past year has witnessed the following new or revised state clean energy programs:

- New Mexico (legislation, 100 percent net zero by 2050).
- California (executive order, 100 percent new zero emission vehicle (ZEV) sales by 2035).
- Massachusetts (distributed solar and storage procurements).
- Virginia (first state in the South with 100 percent clean energy legislation).

The Illinois Governor is pursuing 100 percent net zero legislation, Michigan created new state climate offices, and the state of Washington enacted policies for specific sectors of the economy.

New York, Colorado, and Maine are requiring regulators to implement cuts in carbon emissions and, notably, to support communities and workers most impacted by the transition from fossil fuels.

The news on the federal incentive front is that the expected credits have met expectations. The previously announced federal carbon capture credit (45Q, US\$35 or US\$50/metric tonne of CO₂) has been implemented by regulation. The otherwise expiring credit for residential energy efficiency credits was also extended retroactively, through December 31, 2020.

National Environmental Policy Act overhaul

In July 2020, President Trump announced a comprehensive rewrite of National Environmental Policy Act (NEPA) rules aimed at streamlining government approval of new projects and shortening environmental review periods, including by eliminating the requirement to consider the cumulative impacts of projects. NEPA is intended to call attention to environmental impacts of major federal actions, and has provided a mechanism for communities to challenge major projects, including pipelines and other energy projects.

Even if a project ultimately proceeds, NEPA reviews often take years and can cause significant expense – something cited by proponents of the Trump Administration's rewrite. Opponents of the new NEPA rules argue that environmental project reviews will fail to fully consider environmental justice and climate impacts. In September, Republican lawmakers in Congress introduced a bill to codify the rule changes to make it harder for future administrations to reverse them. Among other things, the bill would restrict NEPA reviews to a project's direct impacts, removing the requirement that the review consider downstream effects, such as climate change or potentially cumulative impacts on disadvantaged communities. In the absence of Congressional action, an incoming Biden administration will likely reverse many of the environmental policies implemented by President Trump, including the controversial NEPA reforms.

FERC Minimum Offer Price Rule – impact on renewables

In April 2020, the Federal Energy Regulatory Commission (FERC) issued an order clarifying the PJM Interconnection Minimum Offer Price Rule (MOPR). The PJM is the electric grid

operator covering 13 states plus the District of Columbia. In a 2018 order, FERC found PJM's tariff to be "unjust and unreasonable" due to what the agency believed was price distortion. That distortion was found to result from state subsidies provided to renewable sources not addressed by the MOPR. In December 2019, FERC ordered PJM to make changes to the MOPR to address price distortions before resuming capacity auctions. The April 2020 order, while exempting most existing renewables, is expected to significantly restrict participation of new renewables in the market.

Due in part to state mandatory renewable portfolio standards, the MOPR may not prevent new renewable projects from being built – although the cost to ratepayers will likely be higher. The largest impact of the MOPR may be felt by the nuclear industry. Unlike existing renewable sources, existing nuclear sources are not exempt under the order. Therefore, the financial assistance provided to nuclear facilities by states in the PJM will no longer serve to lower the cost of the resource. Instead, existing nuclear plants will have to bid into the market at their net avoidable cost rate (ACR), which for nuclear is currently set at the highest possible value of any technology. Coal plants are likely to be most benefited from the MOPR, because they will become more competitive in the market relative to cleaner resources.

This difference in impacts has led to charges that FERC's order undermines state policies that promote renewable energy sources, excluding them from the capacity market while boosting revenues of coal and natural gas power plants. In May, two states and several environmental groups filed lawsuits challenging the order, claiming that it unlawfully interferes with state jurisdiction over energy resource portfolio decisions.

Clean Water Act Section 401 final rule

In July 2020, EPA published its final rule revising the Clean Water Act (CWA) Section 401 certification rule. The revisions change the process by which states participate in the permitting process for federal projects requiring CWA authorizations, including many energy projects. Under the new rule, states: (1) must take final action on the certification request within one year of receipt; (2) only have certification authority over projects that discharge from a point source into waters of the U.S.; and (3) have a more limited ability to insert conditions into the certifications that are unrelated to water quality.

Shortly after publication of the final rule, a coalition of 22 state attorneys general filed a lawsuit challenging the rule, claiming that it unlawfully curtails state authority under the CWA. As of the writing of this chapter, the lawsuit was still pending.

Judicial decisions, court judgments, results of public enquiries

Army Corps of Engineers Nationwide Permit 12

In April 2020, a federal court in Montana invalidated Army Corps of Engineers Nationwide Permit 12 (NWP 12), which is the streamlined environmental authorization used by the Army Corps to issue dredge and fill permits under the CWA for utility construction activities, including pipelines. The immediate target of the court's ruling was the Keystone XL pipeline, which was required to immediately cease construction as a result. However, the decision also prevented the Army Corps from using NWP 12 to issue dredge and fill permits to any new oil and gas pipeline project throughout the country. The basis of the court's ruling was that the Army Corps violated the Endangered Species Act when it reissued NWP 12 in 2017 without first consulting with the U.S. Fish and Wildlife Service.

In July, the U.S. Supreme Court issued an order partially staying the district court's injunction, except as it applies to the Keystone XL pipeline, pending disposition of the appeal in the

Ninth Circuit Court of Appeals. Although the Keystone XL pipeline remains enjoined, the Army Corps can issue CWA permits to other projects under NWP 12 while the matter winds through the appellate courts. However, in part as a result of the uncertainty surrounding an eventual ruling on NWP 12, the potential impact on the cost and schedule of the project, as well as other ongoing legal challenges, the developers of the Atlantic Coast Pipeline announced cancellation of the project in early July.

Climate change litigation

Climate change lawsuits continued to be filed in 2020 against energy companies in jurisdictions throughout the U.S. Plaintiffs in the lawsuits have primarily been states and local governments seeking damages and injunctions under state laws, alleging fossil fuel production has resulted in global climate change and attendant local impacts. There has been an ongoing struggle in each of these cases between the companies on the one hand, and the plaintiffs on the other, over the proper forum in which the matters should be tried, with the companies arguing federal courts have jurisdiction, and the plaintiffs generally seeking to keep the cases in state court.

In October 2020, the U.S. Supreme Court agreed to hear an appeal by energy companies contesting a lawsuit filed by the City of Baltimore. The issue that the Court will decide is whether the case should be tried in federal court or state court. The appeal comes from a Fourth Circuit Court of Appeals ruling in March upholding the lower court's ruling that the action should be heard in state court. The Court's decision will significantly impact the many pending cases throughout the country.

Another type of climate change lawsuit that has been attempted in recent years involves private citizen plaintiffs suing governments (state or federal) asserting a violation of the plaintiffs' constitutional right to a stable climate. Perhaps the most famous of such cases was *Juliana v. United States*, filed by a number of children in a federal court in Oregon. In January 2020, the Ninth Circuit Court of Appeals found that the children in *Juliana* did not have Article III standing to pursue their constitutional claims against the federal government because their claims were not redressable by the court. The court found that it was beyond the power of a federal court to order, design, supervise, or implement plaintiffs' requested remedial plan, a plan which would require a host of complex policy decisions properly left to the discretion of the legislative and executive branches.

Affordable Clean Energy Rule challenges

In 2019, the EPA issued the final Affordable Clean Energy (ACE) Rule, which was a replacement rule for the Obama-era Clean Power Plan. As compared to the predecessor Clean Power Plan, the ACE Rule gives states more authority to determine the best way to reduce emissions from coal-fired power plants. Rather than setting specific standards to cap the emissions, the ACE Rule instead calls on states to decide the best emissions control technologies for power plants within their boundaries.

In April 2020, more than two dozen states and cities, as well as several environmental groups, filed legal challenges in federal court. The complaints argue that EPA abdicated its responsibility under the Clean Air Act to regulate air pollution. Interestingly, some power plant operators and utilities that had already installed expensive pollution-control equipment also filed lawsuits siding with the environmental groups. In addition, certain coal companies filed briefs arguing that EPA went *too* far with the ACE Rule because it does not have the authority to issue the regulation without a formal finding that coal causes or contributes significantly to air pollution.

Major events or developments

The pandemic and energy

Energy production and consumption have both been hit by the pandemic. While these forces should rebound in due time, the pandemic may prove to be a catalyst for trends already under way in U.S. energy. Producers of all stripes have been beset by pandemic-related problems, but the impact has been uneven. A down year for fossil fuels and the simultaneous rise of renewables could signal the beginning of a long-term shift in U.S. energy, or it may prove to be little more than a speed bump for oil and gas.

Overall, renewable energy has weathered the pandemic comparatively well, but 2020 was not without its difficulties. A number of wind projects have been delayed due to supply chain disruptions, and workforces have been reduced as projects are put on hold. In New York, a large solicitation for offshore wind was delayed for several months due to the virus, although it was revived by the governor in July (see *Offshore Wind* discussion above).

The impact on fossil fuels has been greater. More than 30 oil and gas producers sought bankruptcy protection through the first nine months of 2020, and several states, including major producers such as Texas and New Mexico, suspended oil and gas taxes, and waived shut-in penalties following the collapse of demand in the spring. Several mid-year oil and gas lease sales were postponed by BLM.

Renewables look set to be the clear winner in 2020, but natural gas is by no means the clear loser. The global outlook for natural gas does not appear to have deteriorated. Low natural gas prices may prove to have a silver lining by keeping the sector competitive with the ever-increasing supply of cheap renewables.

The oil sector has faced considerable hardship due to the pandemic, and the long-term outlook for liquid petroleum products is complicated by the uncertain future of transportation. As long as economic activity is hamstrung by the pandemic, demand for petroleum is likely to remain depressed. The long-term outlook for oil seems to have shifted, however, as evidenced by the renewed interest in the demand-side aspect of “peak oil”. Whether “peak oil” occurred in 2020, as some have speculated, or is just around the corner, or is decades away is the looming question. The unusual circumstances of 2020 do not provide a clear answer.

California wildfires and power shutoffs

The U.S. was affected by numerous natural calamities in 2020, overlaying the effects of the COVID-19 pandemic. It was the second most active Atlantic hurricane season in history, with Isaias and Laura the most severe of storms running all the way at least to Theta after the Roman alphabet was exhausted. Wildfires burned large swaths of Oregon, Washington state, California, and Colorado. Heat waves and flooding impacted other parts of the country.

The California wildfires had the most energy implications. A single fire complex, the August Complex, burned over 3,000 square kilometers (approaching the size of the state of Rhode Island). Transmission lines have been identified as immediate contributors to some of the recent blazes, and ‘public safety power shutoffs’ (PSPSs) have been imposed for the customers many miles down-wire from the sensitive sections in fire conditions.

Even in the absence of a conflagration, the Golden State has a precarious energy mix dependent on renewables and a nuclear facility slated for shutdown in 2025. Storage capacity is being built up, but when imports from neighboring states are unavailable, actual or near-miss precautionary shutdowns have occurred – in October 2019 and again in August 2020. Conservation and pricing measures are planned to address the load issues in the short term, while longer-term changes in the complex decision-making among government, system operator and utility actors are debated.

Proposals for changes in laws or regulations

As events stand in the second week of November 2020, Joe Biden is the presumptive President-elect. President Trump has not yet conceded, and lawsuits and recounts are still pending in several states. If these challenges are unsuccessful, U.S. energy policy will shift under a Biden administration, though perhaps less radically than some might have hoped or feared.

Before addressing policy differences between President Trump and President-elect Biden, it is worth noting some probable sources of continuity that are largely dictated by market forces. Renewables should continue growing their respective shares of the energy mix, coal will be squeezed more and more by cheaper renewables and natural gas, and the outlook for nuclear and hydroelectric facilities is not likely to dramatically change over four years.

On policy, there are real differences between a Trump administration and a Biden administration. Climate change will again be a focal point of U.S. policy. President-elect Biden has stated that he will rejoin the Paris Agreement on day one of his presidency. This move will be cheered by the broad coalition of climate activists that supported his campaign and much of the general public, but, without major domestic legislation, it will not produce a seismic shift in the U.S. away from fossil fuels.

Without a filibuster-proof majority or, for that matter, a majority in the Senate (two seats in the state of Georgia are subject to runoff elections in January), passing major legislation to address climate change and transition the economy away from fossil fuels is improbable. It remains to be seen whether less ambitious policies, such as a carbon tax or increased R&D for carbon capture and advanced nuclear technologies, could receive bipartisan support.

In lieu of major legislation, a Biden administration will rely heavily on existing regulatory authority. As a nominee, Biden pledged to use executive permitting authority to stop new oil and gas leases on public lands. While this would be a major change from the Trump administration's policy of "energy dominance", the impact of a ban on new leases may be relatively minor, at least in the short-term, because most production occurs on private lands and many oil and gas regulations are the domain of the states. During his campaign, Biden also pledged to cancel the presidential permit that authorized the Keystone XL pipeline, which as president he will have the power to do without legislation or administrative process.

New air and water regulations on oil and gas are likely. Deregulatory moves by the Trump administration will probably be reversed, although any new rules will be subject to administrative process and judicial review. Authority under the Clean Air Act for control of tailpipe emissions could be re-delegated to the state of California, which has an outsized impact on the practices of automotive manufacturers worldwide. Permitting of major infrastructure projects may slow as projects undergo more thorough environmental reviews, especially as it concerns their impacts on climate change if Biden follows through on his promise to reverse Trump's NEPA reforms. By contrast, renewables should expect a more favorable regulatory environment. Offshore wind permitting should accelerate, and renewables could receive an additional boost through increased federal procurement and the opening of leasing areas off the coast of California.

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