

COOK INLET GAS



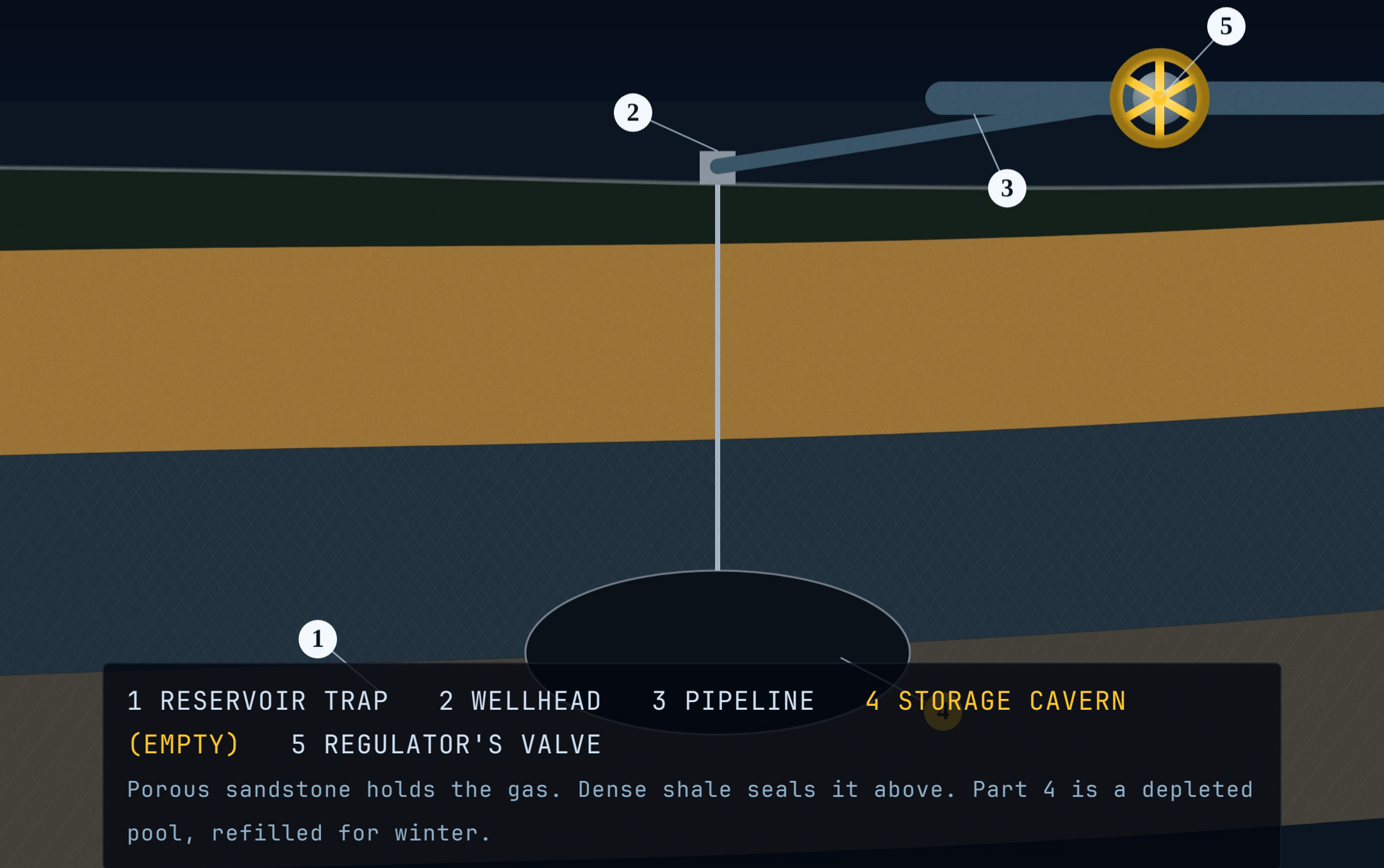
# Alaska's gas machine, in cutaway.

*And the valve that just shut.*



# Five parts move gas from rock to furnace

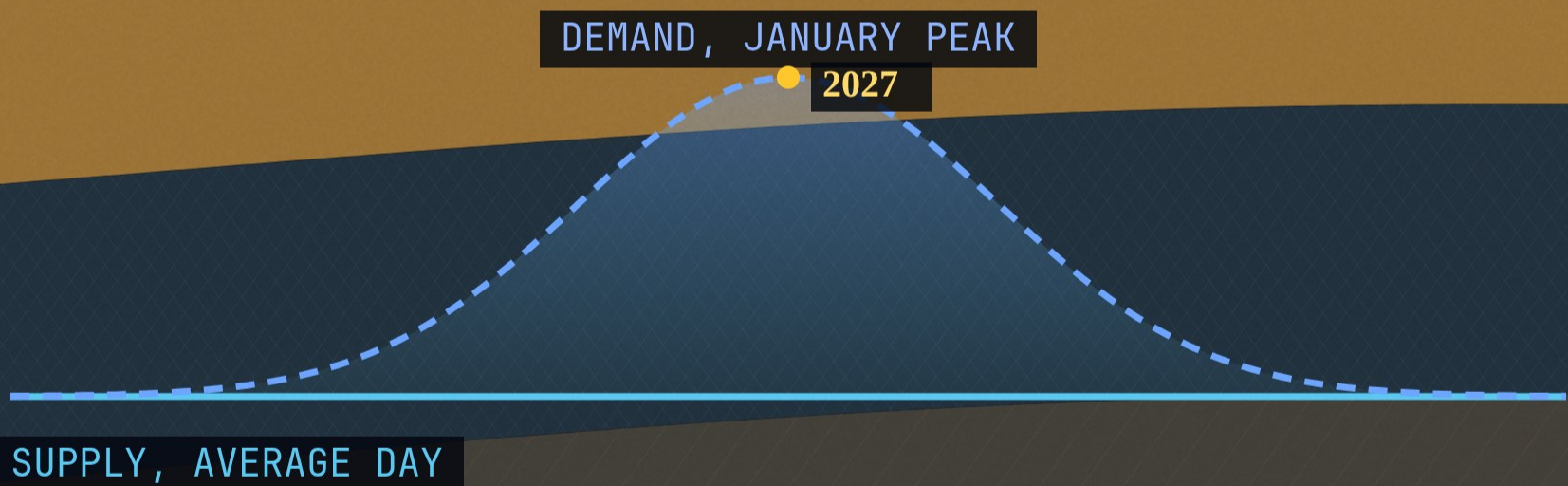
Reservoir trap, wellhead, pipeline, storage cavern, and the state regulator's valve. Part four is a battery for deep winter. Right now, it sits empty.



## THE PROBLEM

# Enough for an average day. Not for January.

Cook Inlet's aging fields can meet a normal day, but not a deep-cold peak, and there is little storage to bridge the gap. A former state senator's *op-ed* warns of a Southcentral shortfall by 2027.



op-ed, Anchorage Daily News, 2026-07-06 (c12) · curves illustrative

# Turn a dead reservoir into a winter battery

Enstar proposed buying the depleted Kenai Loop Pool from AIX Energy and refilling it to hold 25 billion cubic feet, close to half a year's gas, for about \$240 million and up to \$12 a month on the average bill.

\$240M plan (c3) · 25 Bcf, near half annual demand (c6)  
+\$12 / mo avg bill (c4)



ONE YEAR OF GAS



THE GATE

# Every fix runs through one valve

The Regulatory Commission of Alaska decides whether a utility's plan is prudent before customers ever pay for it.

RCA • PRUDENCE REVIEW

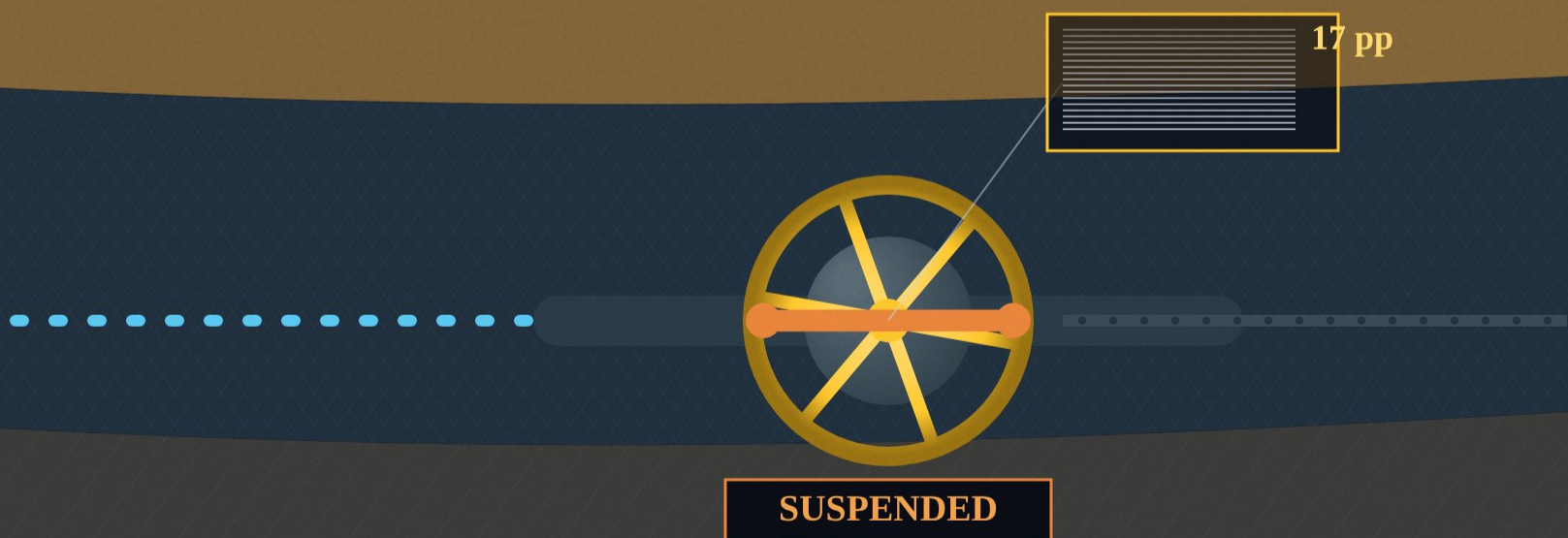


JULY 10

# The regulator shut the valve

On July 10 the RCA denied the plan, calling it an *"extraordinary request"* that *"lacked basic information about the project."* The order ran 17 pages. Enstar's president said the company suspended the project.

RCA order · 17 pp (c2) · STATUS: SUSPENDED (c9)



# Can it hold?

Three questions the fix could not answer. Any power promise should have to.

## 1 Hold the winter?

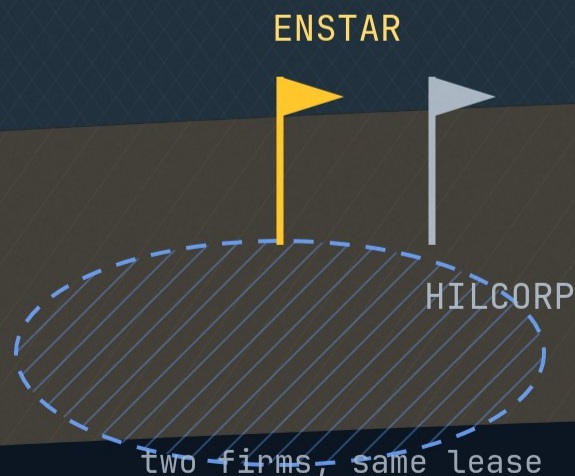
Even half a year of storage was denied. (c6, c1)

## 2 Hold the ground?

The state has not confirmed the pool can store gas, and two firms claim the same lease. (c7, c8)

## 3 Hold the bill?

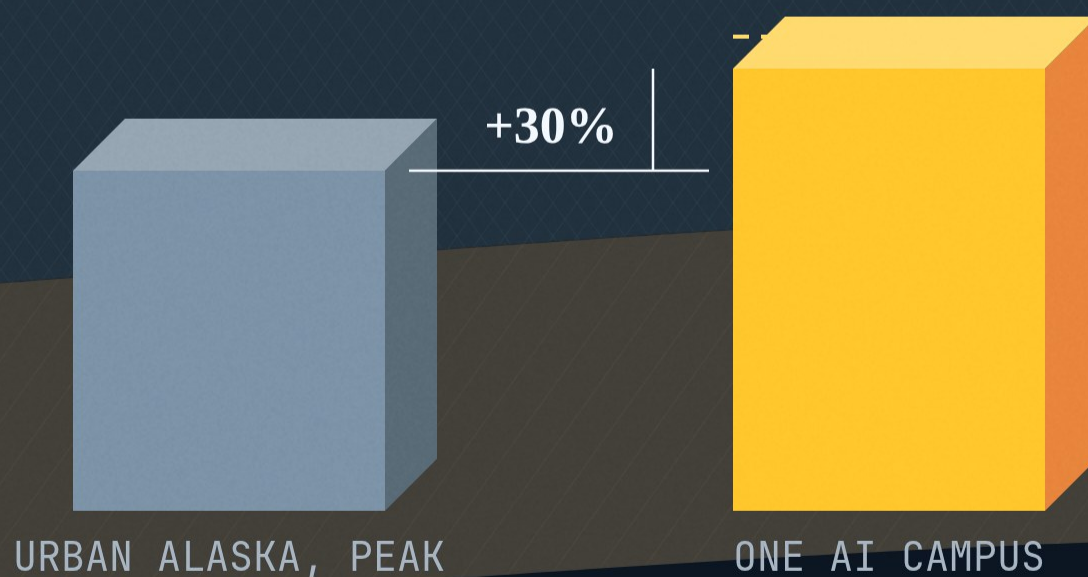
About \$12 a month, and the project is now suspended. (c4, c9)



# Now measure what wants to plug in

One proposed North Slope AI campus, from STAK Energy, would generate "a gigawatt or more, some 30% more than urban Alaska's peak demand." More than \$10 billion at full buildout. Its comment window closes July 17.

STAK lease: 500+ comments, fewer than a dozen in favor (c15) · \$10B+ (c14) · window closes JUL 17 (c16)



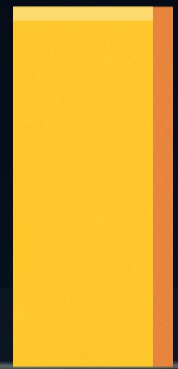
Northern Journal, Jul 3 (c13)

Gas storage and power demand are different units, not one sum.

ONE QUESTION

# Store one winter first?

Should Alaska approve a gigawatt of AI load before it can store a single winter of gas?



ALASKA.AI

alaskaaihq.com

60°33'N · 151°15'W

Sources in comments.

09 / 09