Electric Transmission Infrastructure Challenge

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Outline

• Transmission Projects in the West
• Market Uncertainties
• Policy Uncertainties
• Final Messages
2026 Common Case Transmission Assumptions (CCTA)

The purpose of the CCTA is to provide a basic set of facilities that TEPPC can use as a starting point for their own studies. The CCTA is a list of facilities that are expected to be in-service by 2026.

1. Boardman – Hemingway (B2H) [500 kV]
2. Delaney – Colorado River (Ten West Link)
3. Delaney – Palo Verde [500 kV]
4. Delaney – Sun Valley [500 kV]
5. Energy Gateway: Wallula – McNary [230 kV]
6. Energy Gateway South: Aeolus – Mona [500 kV]
7. Energy Gateway West: Bridger – Populus [500 kV]
9. Energy Gateway West: Midpoint – Hemingway [500 kV]
10. Energy Gateway West: Populus – Midpoint [500 kV]
11. Energy Gateway West: Populus – Cedar Hill – Hemingway [500 kV]
12. Harry Allen – Eldorado (Centennial II) [500 kV]
13. I-15 Corridor Reinforcement Project (Castle Rock – Troutdale)
14. Morgan – Sun Valley [500 kV]
15. Pawnee – Daniels Park
16. West of McNary Reinforcement Project Group 2 (Big Eddy – Knight)

Blue text – Indicated “Under Construction”

Regional Planning Coordination Group (RPCG)

CAISO – California Independent System
CTPG – California Transmission Planning Group
CG – Columbia Grid
CCPG – Colorado Coordinated Planning Group
NTTG – Northern Tier Transmission Group
SIERRA – Sierra Subregional Planning Group
SIWAT – Southwestern Area Transmission
AECS – Alberta Electric System Operator
BCCPG – BC Coordinated Planning Group
## 5 Advanced Projects

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Voltage (kV)</th>
<th>Project Transfer Capability (MW)</th>
<th>In-service Date (Year)</th>
<th>Length (Miles)</th>
<th>Origin</th>
<th>Termination</th>
<th>Sponsor</th>
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</thead>
<tbody>
<tr>
<td>Gateway South</td>
<td>500 kV AC</td>
<td>600</td>
<td>2020-2024</td>
<td>400</td>
<td>Aeolus, WY</td>
<td>Clover, UT</td>
<td>PacifiCorp</td>
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<tr>
<td>Gateway West</td>
<td>230/500 kV AC</td>
<td>600</td>
<td>2019-2024</td>
<td>1000</td>
<td>Windstar, WY</td>
<td>Hemingway, ID</td>
<td>PacifiCorp</td>
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<tr>
<td>Gateway Full (both projects)</td>
<td>230/500 kV AC</td>
<td>3000</td>
<td>2019-2024</td>
<td>1400</td>
<td>See above</td>
<td>See above</td>
<td>PacifiCorp</td>
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<tr>
<td>Southline</td>
<td>230/345 kV AC</td>
<td>1000</td>
<td>2018-2020</td>
<td>370</td>
<td>Afton, NM</td>
<td>Saguaro/Tortolita, AZ</td>
<td>Hunt Power, Black Forest Partners</td>
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<tr>
<td>SunZia</td>
<td>500 kV AC</td>
<td>1500-3000</td>
<td>2020</td>
<td>515</td>
<td>Near Corona, NM</td>
<td>Pinal Central, AZ</td>
<td>SouthWestern Power Group</td>
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<td>SWIP North</td>
<td>500 kV AC</td>
<td>1700</td>
<td>2021</td>
<td>275</td>
<td>Midpoint, ID</td>
<td>Robinson Summit, NV</td>
<td>LS Power</td>
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<tr>
<td>TransWest Express</td>
<td>600 kV DC</td>
<td>1500-3000</td>
<td>2021</td>
<td>730</td>
<td>Near Platte, WY</td>
<td>Eldorado/Mead, NV</td>
<td>TransWest Express</td>
</tr>
</tbody>
</table>
Market Uncertainties

- BTM Solar PV
  - Over-generation
  - Changing imports/exports
- Coal Unit Retirements
  - Freed-up transmission
- Load Departures
  - Impact utility renewable procurement
  - Aggregator procurement likely to be local
Policy Uncertainties

• State RPS Requirements
  • On-Target Utilities: Lack of urgent procurement need

• Tax Credits
  • ITC/PTC Extension: Not enough to incentivize near-term investment

• Regional Electricity Markets
  • CAISO EIM / Regional Market
  • Mountain West Transmission Group
  • Alberta Energy System Operator
Final Messages

• Developers and financiers need market and policy certainty prior to investing in capital intensive long-lived assets.

• Long-term commitment of end-use electricity customers is the key. Investment risk is not diminished, it is transferred from transmission investors to electricity ratepayers.

• Not easy in this market/policy environment.
Thank You

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