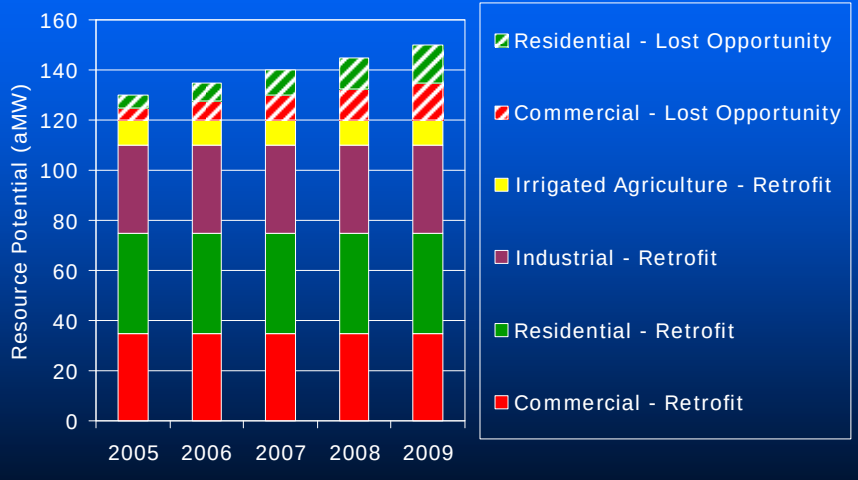
Regional Conservation Savings Since the 5th Plan's Adoption

Are We Meeting the Plan's Targets?

March 14, 2008

Northwest Power and Conservation Council

5th Plan Conservation Resource Acquisition Targets 2005 – 2009 = 700 aMW



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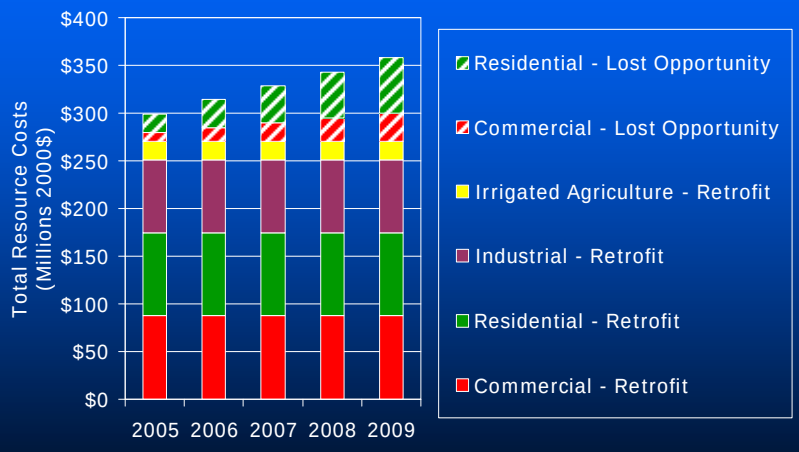
Total Resource Acquisition Cost 2005 – 2009 = $1.64 billion



Average Levelized Cost = 2.4 cents/kWh (2000$)

slide 3

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Regional Technical Forum's Utility System Conservation Accomplishments Survey

- Online Survey of All Utilities and System Benefits Charge Administrators
- Conducted Annually
- Supplemented By
  - Utility program reports submitted to Bonneville
  - Northwest Energy Efficiency Alliance regional evaluation of energy efficiency market changes

slide 4

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How "Good" Are the Numbers?

Survey Year	2005	2006	2007
Share of Regional Load	99%	98%	86%
Number of Utilities Covered	107	105	83

slide 5

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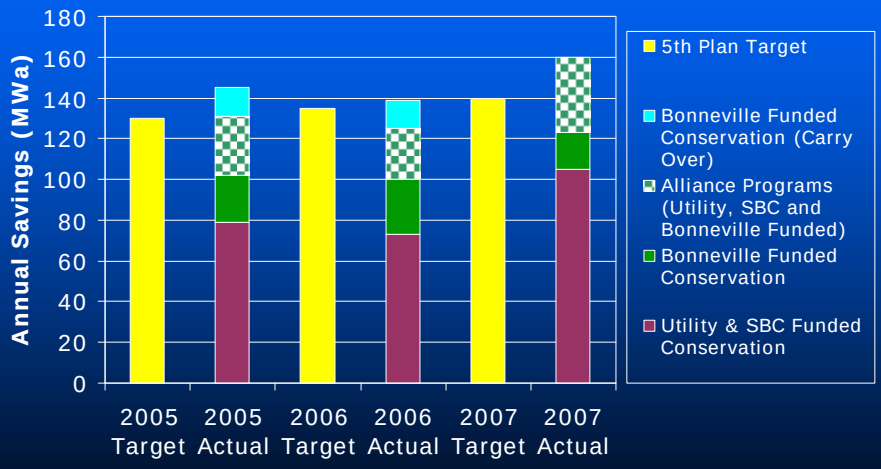
The Region Is *Exceeding* the 5th Plan's Targets With Utility Funded Programs Alone!



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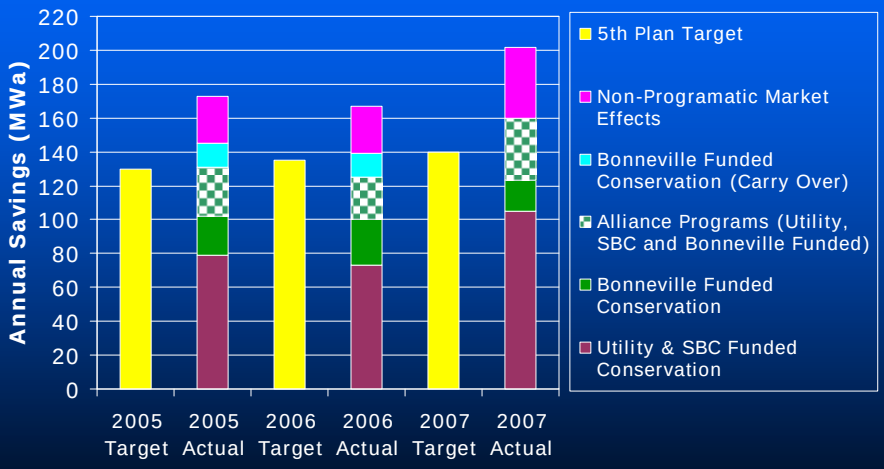
When Overall Market Changes Are Considered, The Region Set An All Time Savings Record in 2007



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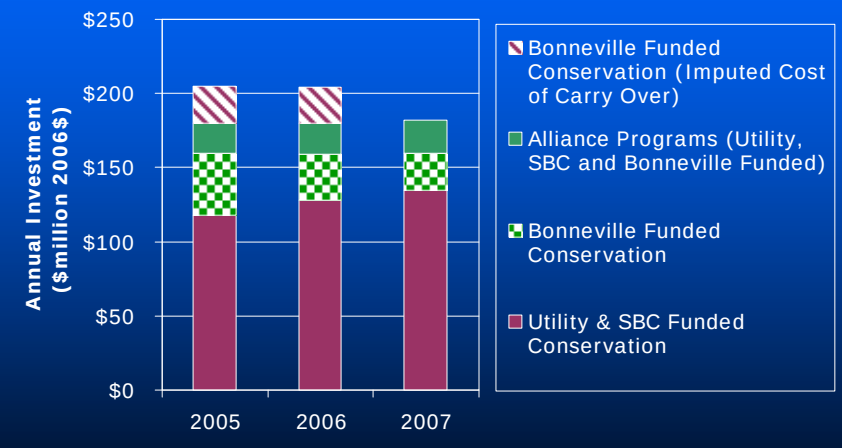
Regional Utility, SBC Administrator and Bonneville Conservation Investments



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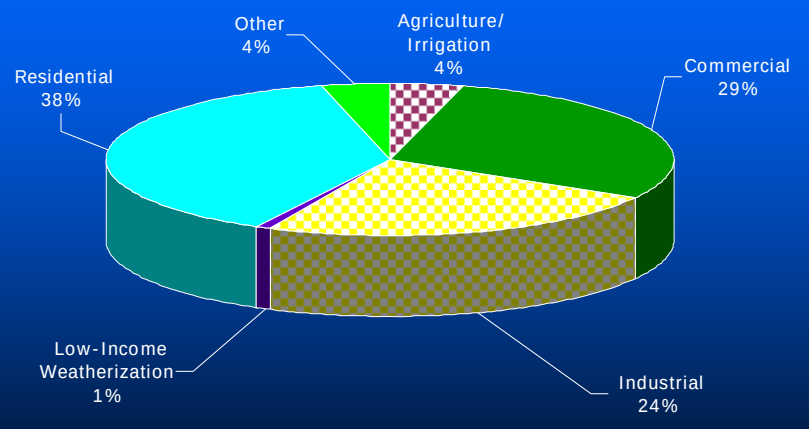
Distribution of Savings Across Sectors (Excludes NEEA)



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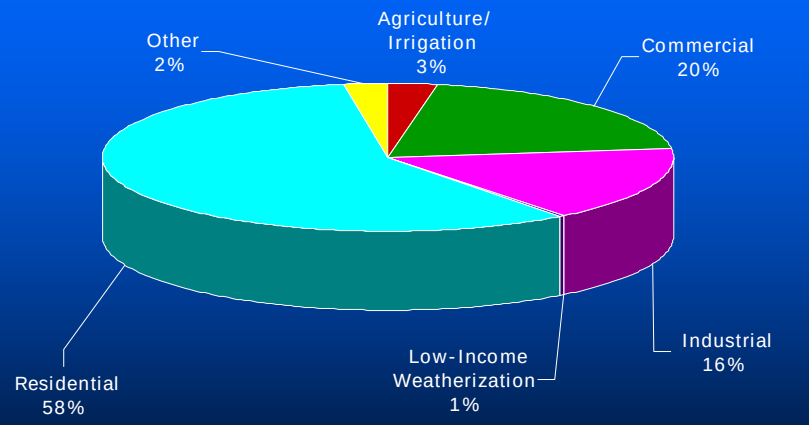
Distribution of Savings Across Sectors with NEEA



60% of Residential Sector Savings Come from CFLs – This is consistent with 5th Plan's Assessment of sector conservation potential

slide 10

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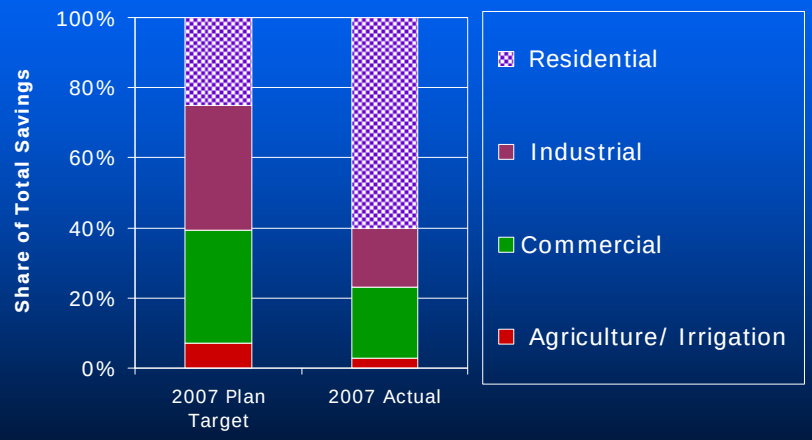
Residential Sector Savings Comprise Nearly 60% of the Total



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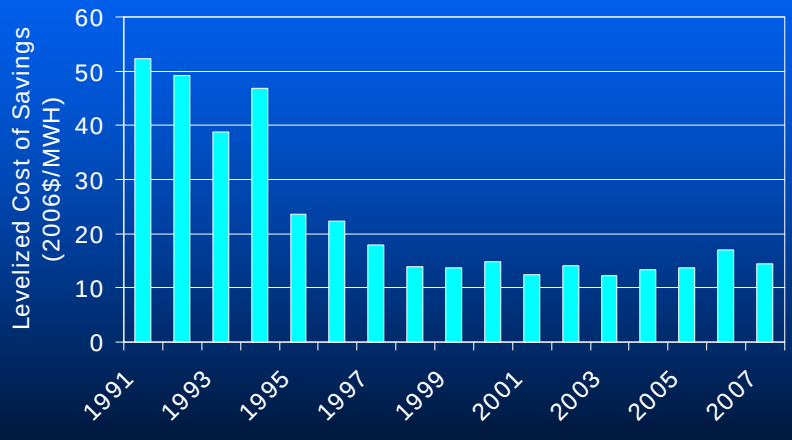
Utility Cost of Conservation Savings Are Below $20/MWH (20006$)



slide 12

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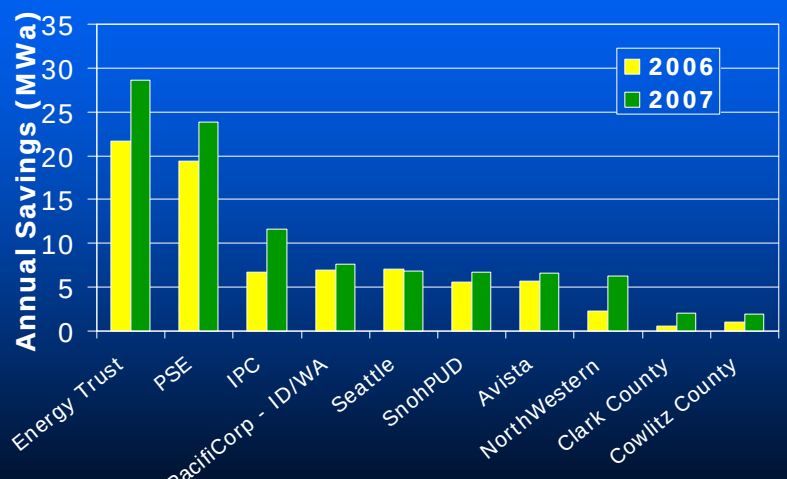
10 Largest Utilities/Program Administrators 2007 vs 2006 Savings



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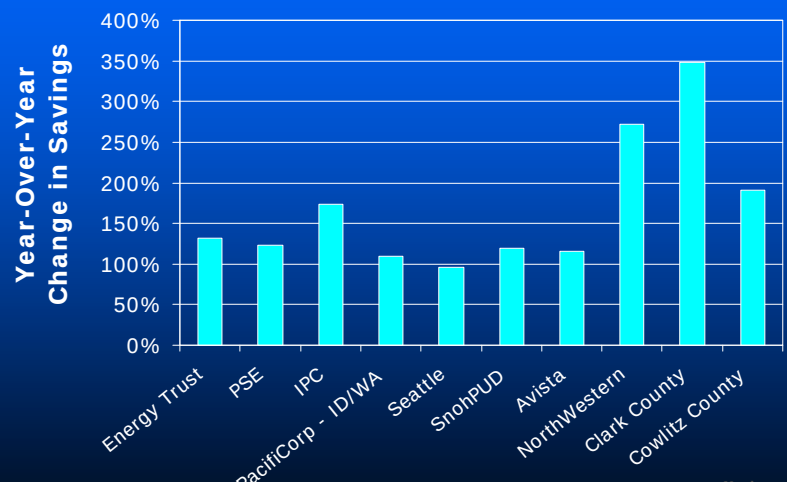
10 Largest Utilities/Program Administrators Year-Over-Year Change in Savings



slide 14

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Summary

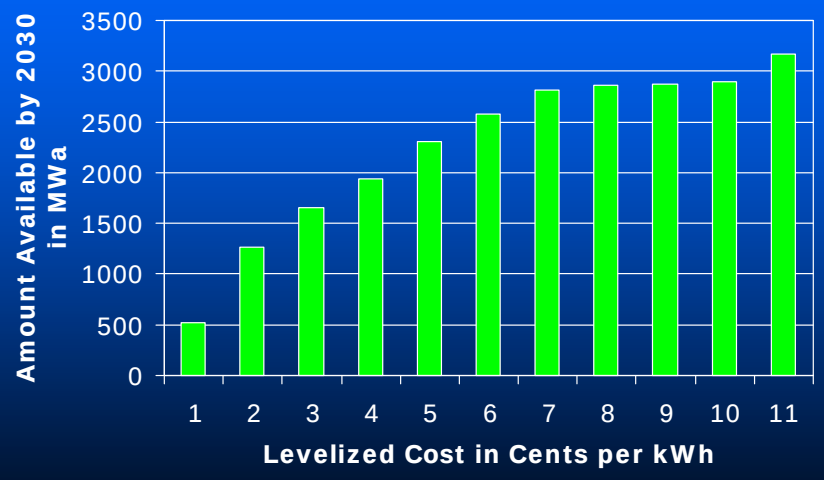
Initial Direction on Conservation Supply Curves 6th Power Plan

Describe the Characteristics of Conservation Available to be Developed

- Amount of conservation available
- At what cost
- Over what time frame

Typical Supply Curve

Amount & Cost



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Suite of Supply Curves

Depending on Timeframe Available

- Lost-Opportunity
  - Available only as new homes & businesses, new appliances or equipment
  - Only incremental cost & savings
  - 'Lost' as a resource, at that cost, if not developed
  - Amount available tied to economic forecast
- Non- Lost-Opportunity (Retrofit)
  - Available any time over forecast period
  - But practical limits on developable pace

slide 18

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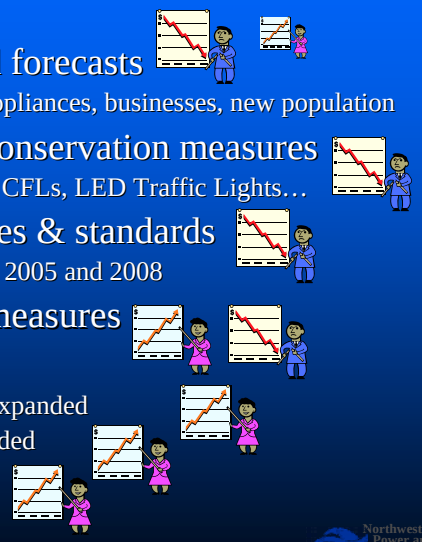
Revisions to 5th Plan Conservation Supply Curves - Major Changes

- Calibrate to new load forecasts
  - Units: Number homes, appliances, businesses, new population
- Remove completed conservation measures
  - Conservation 2005-2009: CFLs, LED Traffic Lights…
- Remove adopted codes & standards
  - State & Federal standards 2005 and 2008
- Revise key existing measures
- Add new measures
  - Industrial supply curves expanded
  - Distribution efficiency added
  - New technologies added



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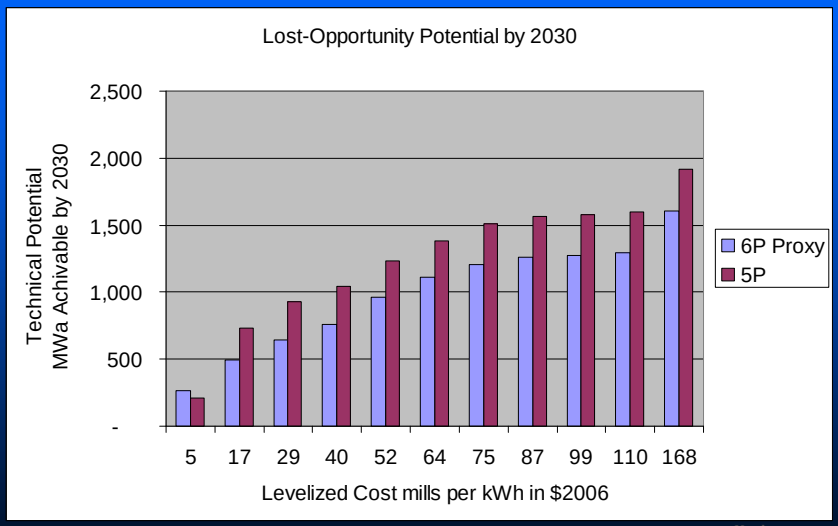
Test Curve - Lost Opportunity



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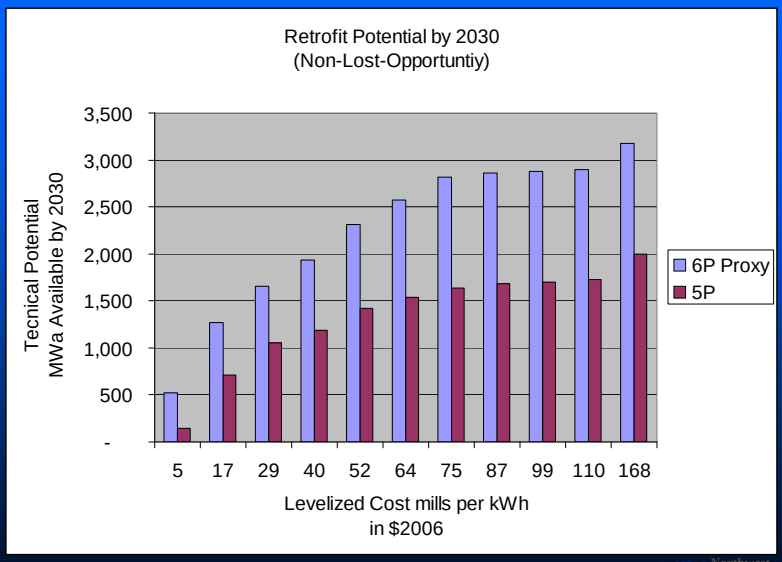
Test Curve – Retrofit 2030



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