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# 2014 10-Year Assessment Preliminary Needs and Solutions

April 14, 2013

Stakeholder and Customer Presentation

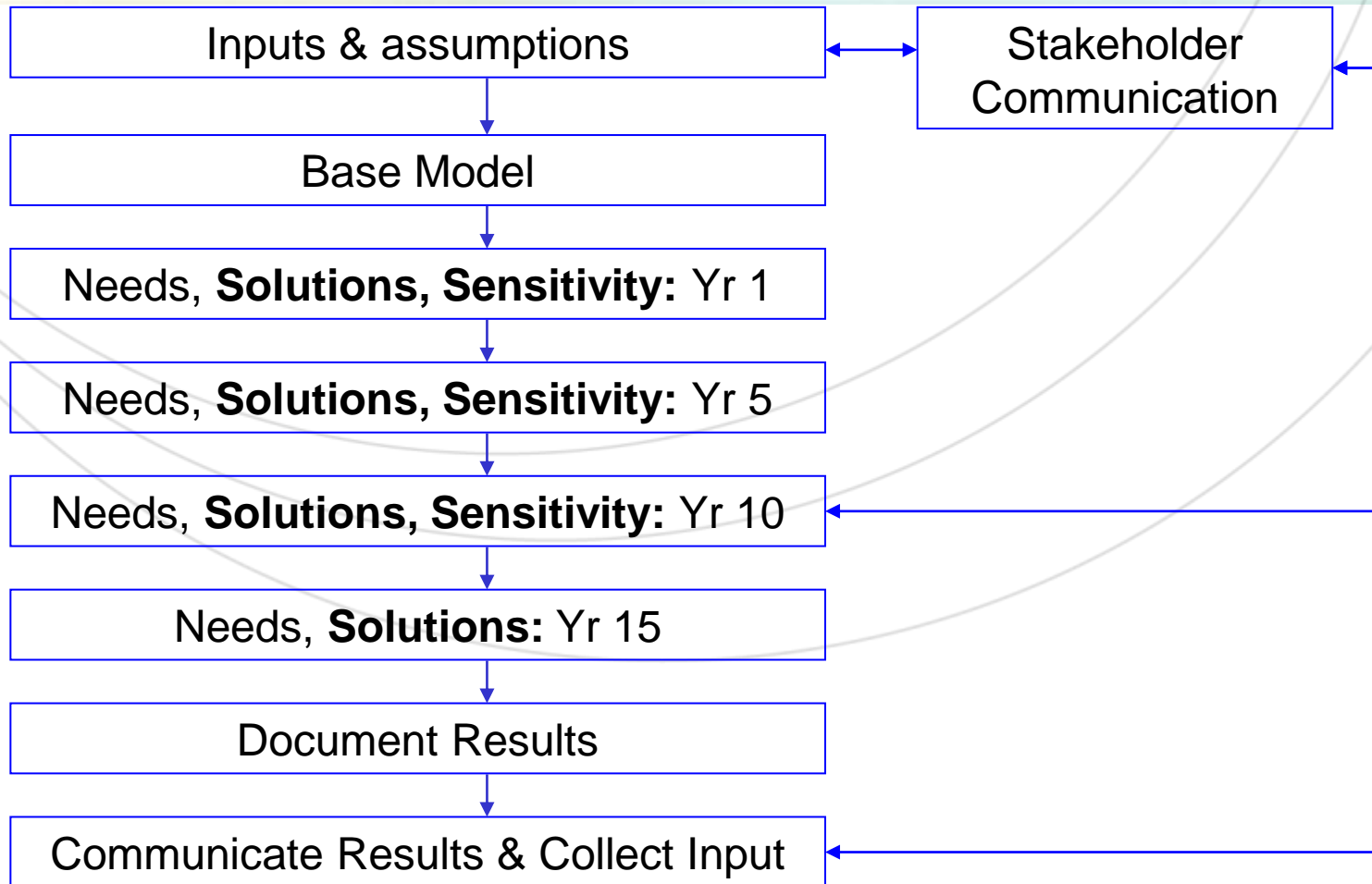
# Purpose

- Summarize Needs
- Present Preliminary Solutions
- Obtain feedback on solutions
- Continue to comply with FERC open planning requirements

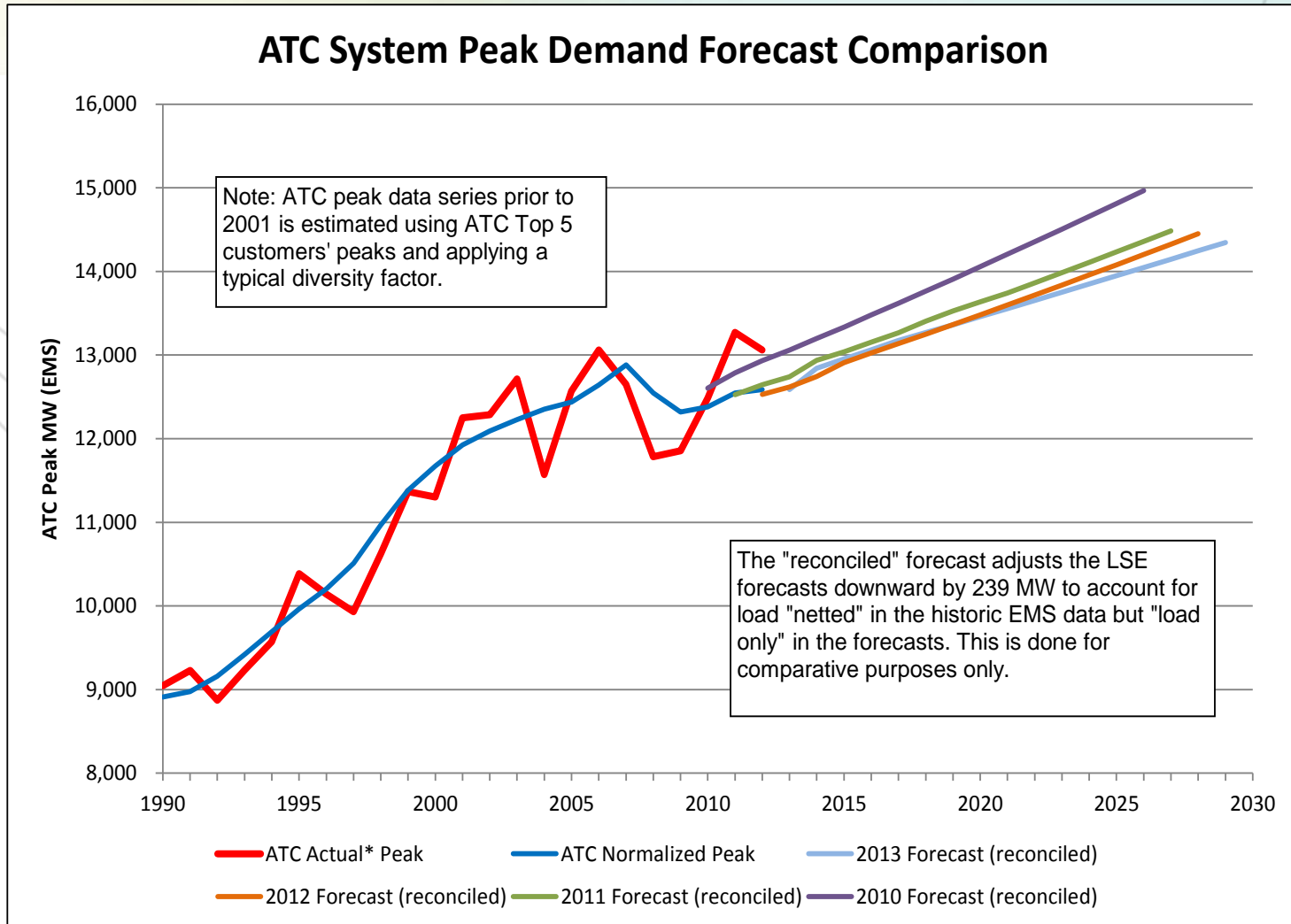
# Preliminary Key Messages

- Load forecast growth rate similar to 2013 Assessment
- Generation assumption changes
- Some new or advanced projects
- Some projects delayed or cancelled
- Participating in Regional Studies

# Assessment Process



# Forecast Trends



# Generation Changes

- Retirements (-265 MW)
- Wind (-29 MW)
- Other increases (+10 MW)
- Other reductions (-24 MW)

# Need Drivers Summary

Need Drivers	Zone				
	1	2	3	4	5
G-T		X	X	X	
TSR	X				
Condition	X	X	X	X	X
D-T	X	X	X	X	X
Economic Benefits	X	X	X	X	X
Load Growth	X	X	X	X	X
Dispatch/Biases	X	X	X	X	X
Regional		X	X		

# Load Range Models

2013 TYA		2014 TYA	
<i>Model</i>	<i>Year(s) Studied</i>	<i>Model</i>	<i>Year(s) Studied</i>
Summer Peak	2014,2018,2023, and 2028	Summer Peak	2015,2019,2024, and 2029
Minimum Load (40% peak)	2014, 2023	Minimum Load (40% peak)	2015, 2019
70% Load Firm Transfers <i>(All-Projects Model Only)</i>	2018, 2023	Shoulder Load (70/80/90% peak) Firm Transfers <i>(All-Projects Model Only)</i>	2019, 2024



# Sensitivity Models

2013 TYA		2014 TYA	
<i>Model</i>	<i>Year(s) Studied</i>	<i>Model</i>	<i>Year(s) Studied</i>
<i>Not Studied</i>	<i>N/A</i>	90/10 High Load	2024
90% Load E-W Bias	2018, 2023	Shoulder Load E-W Bias	2019, 2024
70% Load W-E Bias	2018, 2023	Shoulder Load W-E Bias	2019, 2024

- No new public policy requirements were identified beyond what is modeled

# Contributing Studies

- 1<sup>st</sup> contingency Needs – 4 years
- Multiple Outages
- Generation – Transmission studies
- Distribution – Transmission studies
- Economic Benefits studies
- Regional Reliability
- Public Policy Benefits
- Bay Lake studies

# Preliminary Impacts to Capital Forecast

- **First 2 years**
  - 2 projects deferred
  - 8 projects advanced
  - 1 project cancelled
  - 2 projects added
- **Beyond 2 years**
  - 4 projects deferred
  - 0 projects advanced
  - 4 projects cancelled
  - 6 projects added
- **Refer to Preliminary Network Project List for more detail**

# Stakeholder Communication

- **February – April 2013**
  - Requested load forecast from LDCs
- **September 2013**
  - Sent final load forecast back to LDCs
  - Process and assumptions meeting
  - Suggested new sensitivity studies
- **February 2014**
  - Posted preliminary needs summary
- **April 2014**
  - Stakeholder preliminary needs and solutions meeting

# Next Steps

- Spring – Cost estimates developed
- Spring – Study write-ups drafted
- Summer – ATC Review/approval
- Autumn – Publication

# Questions?

For more information, please contact

David Smith

Phone: 920-338-6537

Email: [dsmith@atcllc.com](mailto:dsmith@atcllc.com)



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