Energy Trust of Oregon

Draft Energy Efficiency Resource Assessment and Supply Curves 2008 – 2027

December 3, 2008

Energy Trust of Oregon, Inc.

Purpose of Presentation – To Provide Draft Results of 2008 Resource Assessment conducted by the Energy Trust on Behalf of Oregon IOU's

Overview of Presentation:

- Show a draft of the Technical and Achievable, cost effective potential over 20 year planning horizon.
- What is new?
- Present total potential for both PPL, PGE, NWN, and CNG.
- Provide estimates of potential by Sector and End Use.
- Describe the steps of the estimation process.
- Talk about next steps: Bundling measures into programs, and deploying programs over the 20 years.

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What's New?

- Updated utility data
- Updated baseline, high efficiency specifications, and costs
- Added Benefit/Cost Ratios
- Addressed emerging technologies
- Industrial model can separate self direct and >1aMW

New measures

- Home energy monitors
- Refrigerator recycling
- Minisplit heat pumps
- New Energy Star homes
- Heat pump water heater
- Low Power Mode Appliances
- High efficient gas water heater

Before You Start –

- Participant Cost Test (PTC)
  - Costs and benefits to the program participant
- Total Resource Cost (TRC)
  - All Quantifiable costs & benefits regardless of who accrues them. Includes participant and others' costs
- Utility Cost Test (UTC)
  - Quantifiable costs & benefits that accrue only to the utility system. Specifically excludes participant costs
- Rate Impact Measure (RIM)
  - Net change in electricity utility revenue requirements.
    - Attempts to measure rate impact on all utility customers especially those that do not directly participate in the conservation program
    - Treats "lost revenues" (lower participant bills) as a cost

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- BCR = NPV of benefits / Total resource cost

- NPV of benefits includes:

  Savings * Avoided Costs

  Plus Adjustments for

  Time of use, Hedge Value, Carbon adder, quantifiable NEBs

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Inputs to Resource Potentials Assessment Methodology

- Availability
  - Scope of measures
    - Technologies
    - Practices
  - Applicability territory
    - Number of units
    - Units savings
  - Achievable over time
    - Retrofit
    - Lost-Opportunity

- Costs
  - Materials & labor
  - Annual O&M
  - Periodic Replacement
  - Program Admin
  - Financing costs
  - Externalities
  - Other non-electric

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Summary of Technical Potential by Utility for the years 2008-2027

Electric Utilities	**PGE**	**PAC**	**Both Utilities**
	aMW	**aMW**	**aMW**
Residential	79	132	211
Commercial	181	126	308
Industrial	223	82	305
Natural Gas Utilities	**NWN**	**CNG**	**Both Utilities**
	MMtherm	**MMtherm**	**MMtherm**
Residential	76	20	96
Commercial	38	2	40
Industrial	12		12

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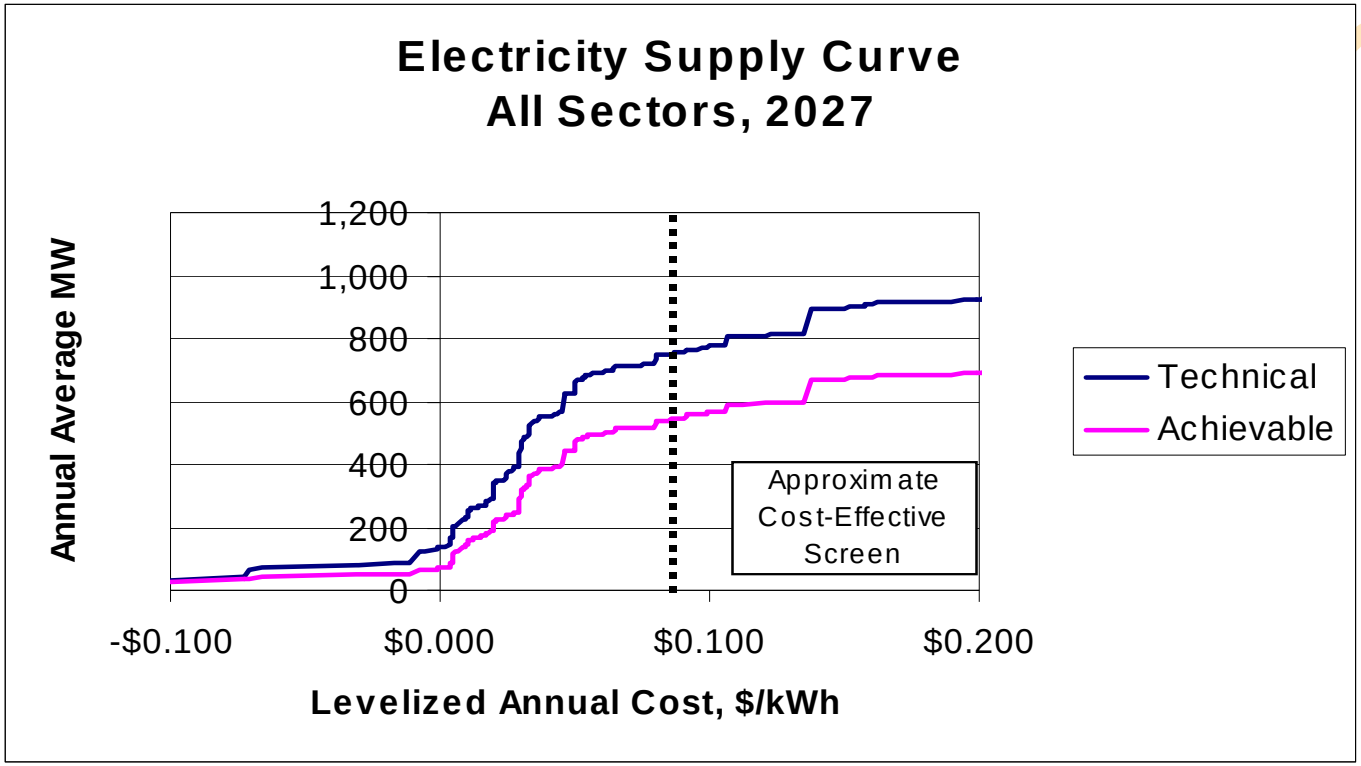
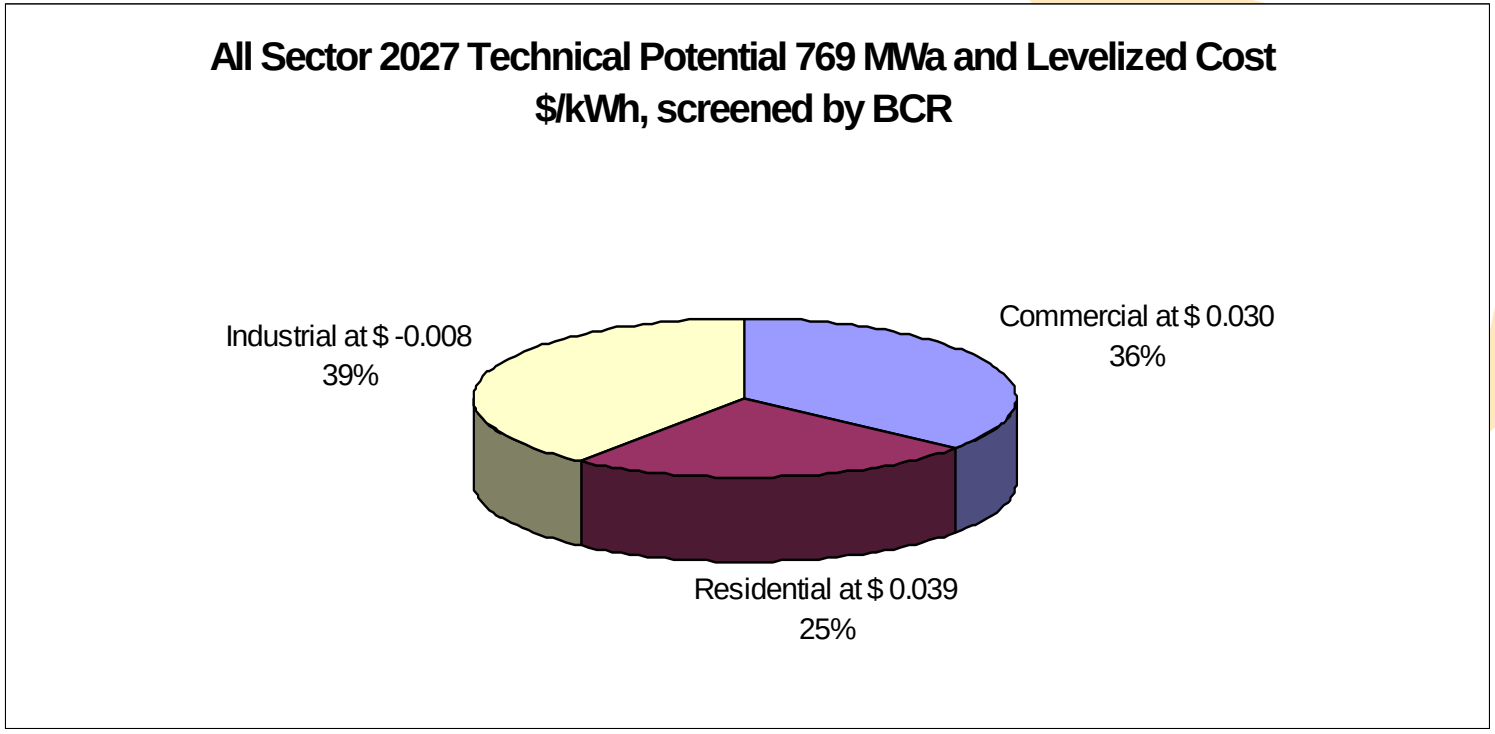
2008-2027 Draft Supply Curve for ETO - Oregon Electric IOU's

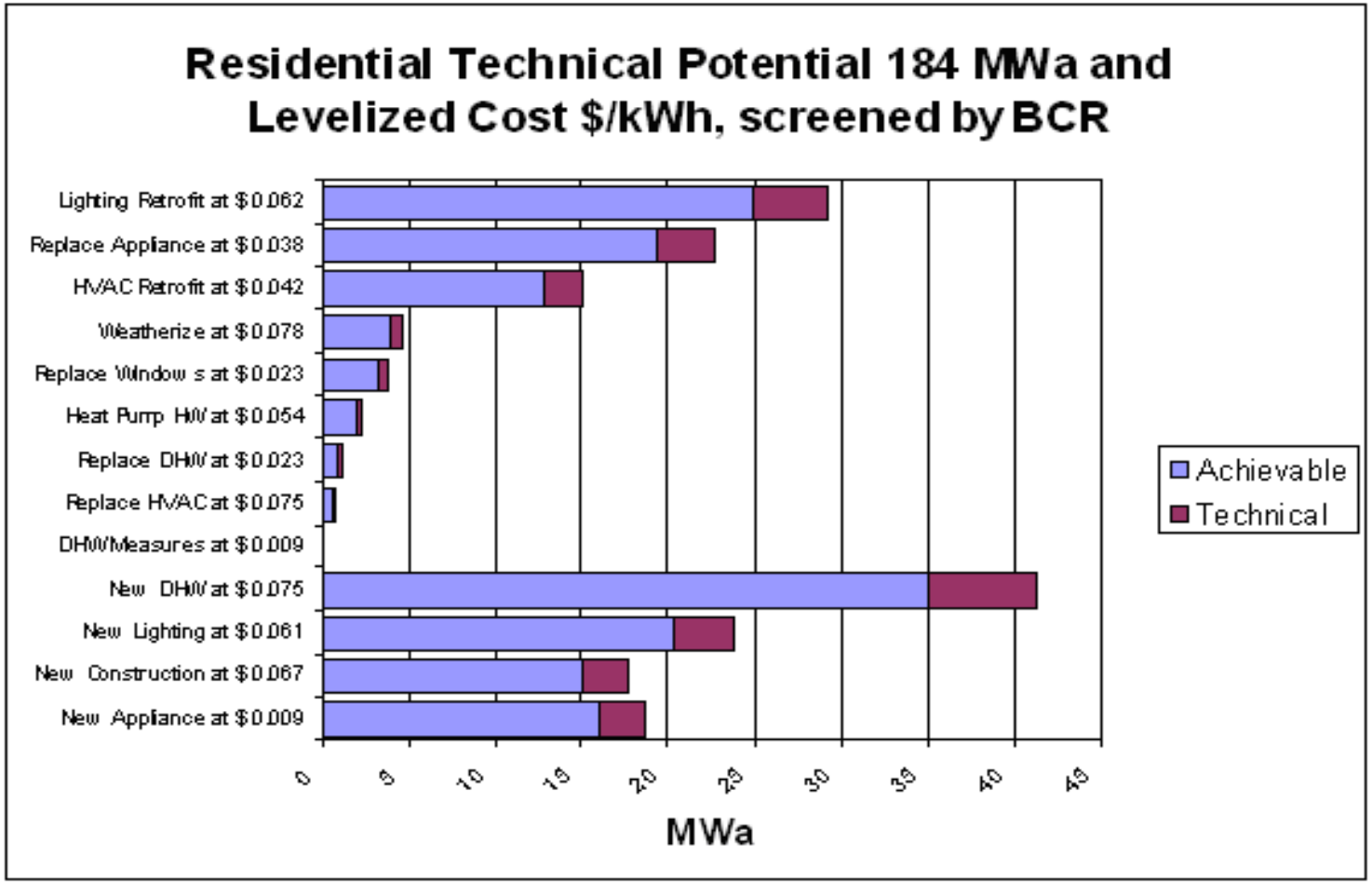
- 769 aMW of Technical Potential at $0.095/kWh Levelized cost



2008-2027 Sector Percentages of Technical Potential - Oregon Electric IOU's

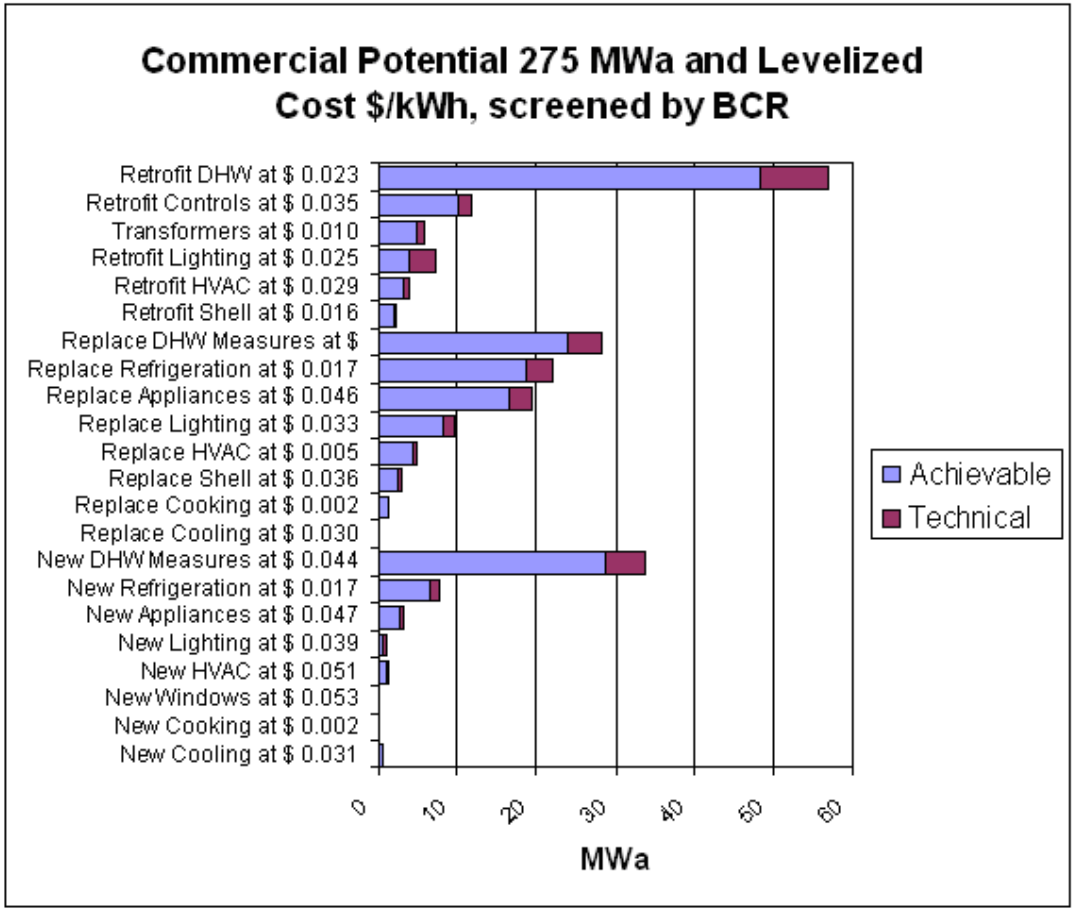


2008-2027 Residential Sector Measures of Cost Effective Achievable & Technical Potential - Electric



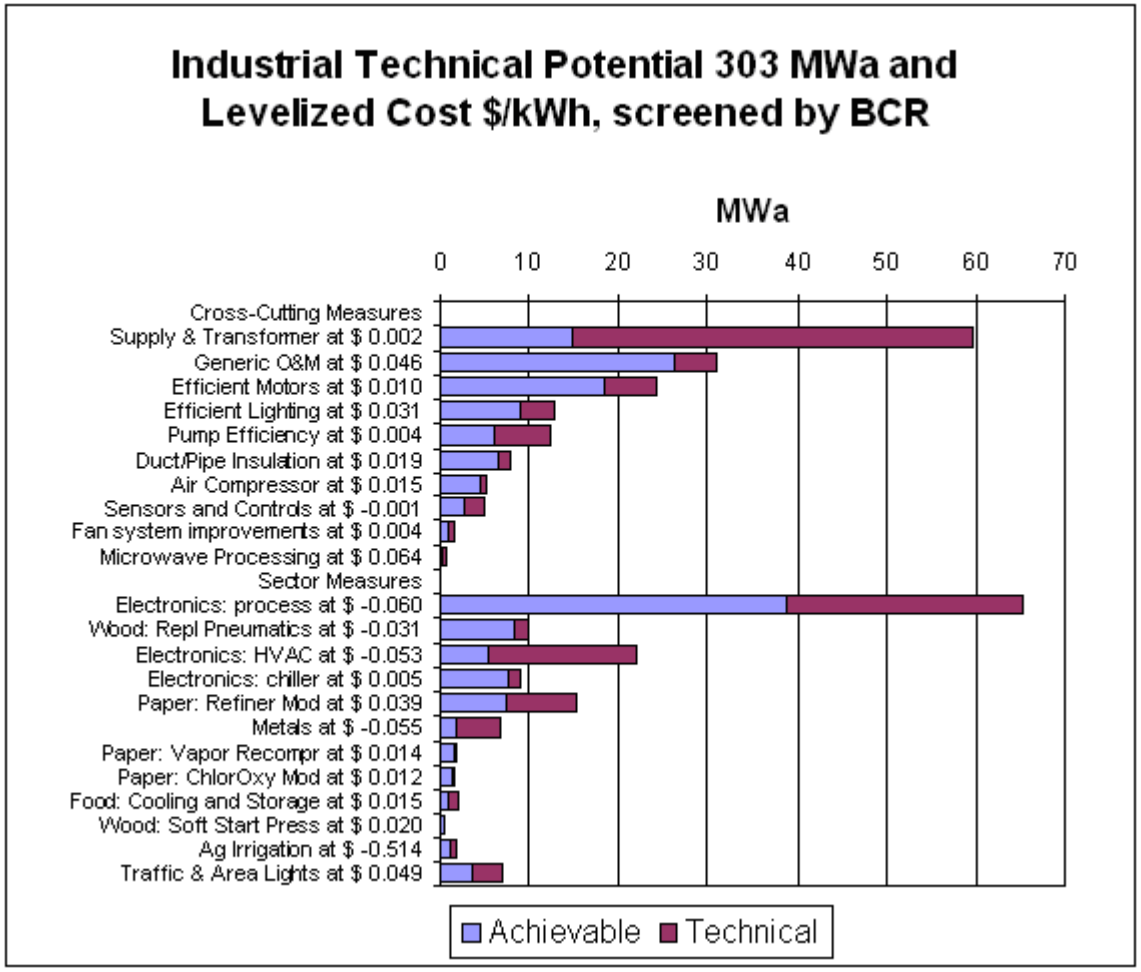
2008 Commercial Sector Measures of Cost Effective Achievable & Technical Potential - Electric

- Commercial 2008 Draft Resource Assessment

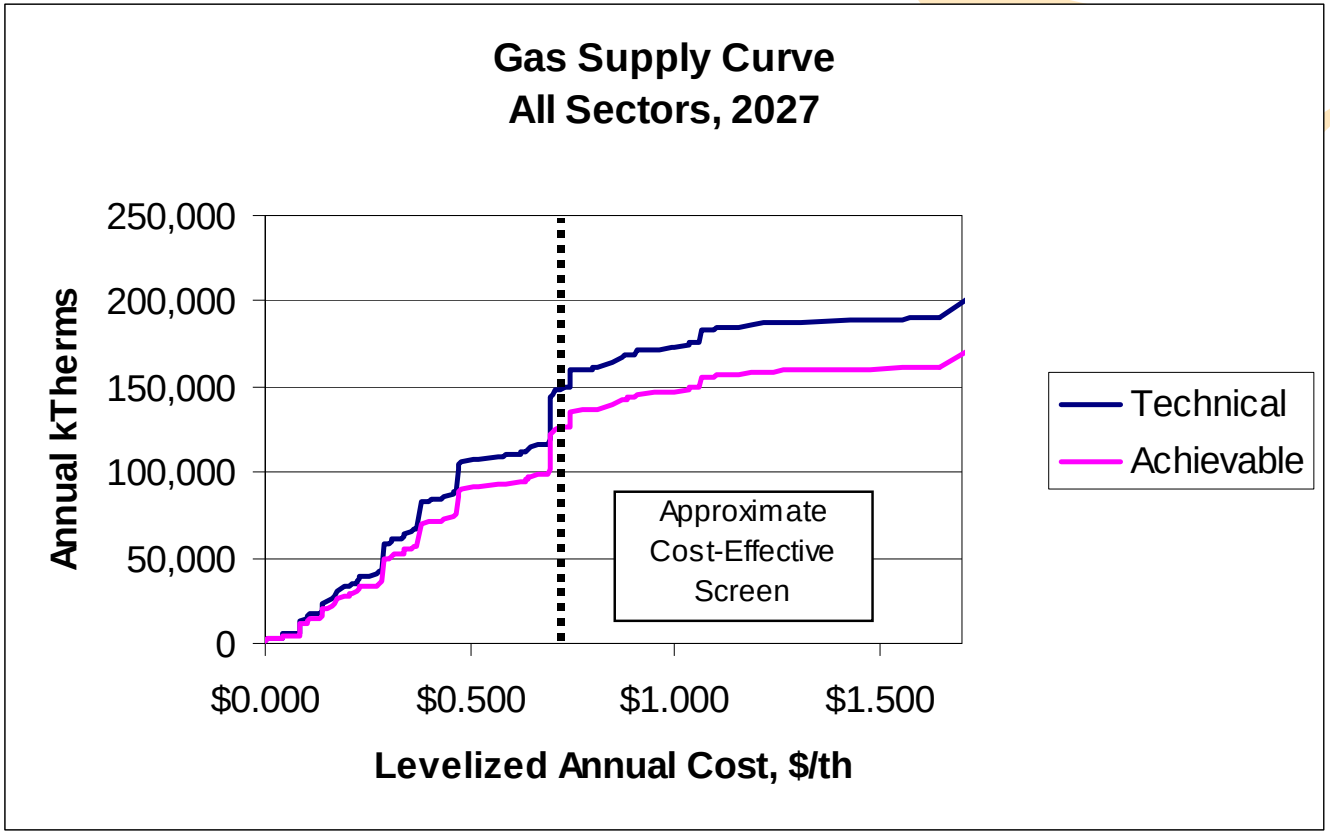


2008 Industrial Sector and Cross-Cutting Measures of Cost Effective Achievable & Technical Potential - Electric

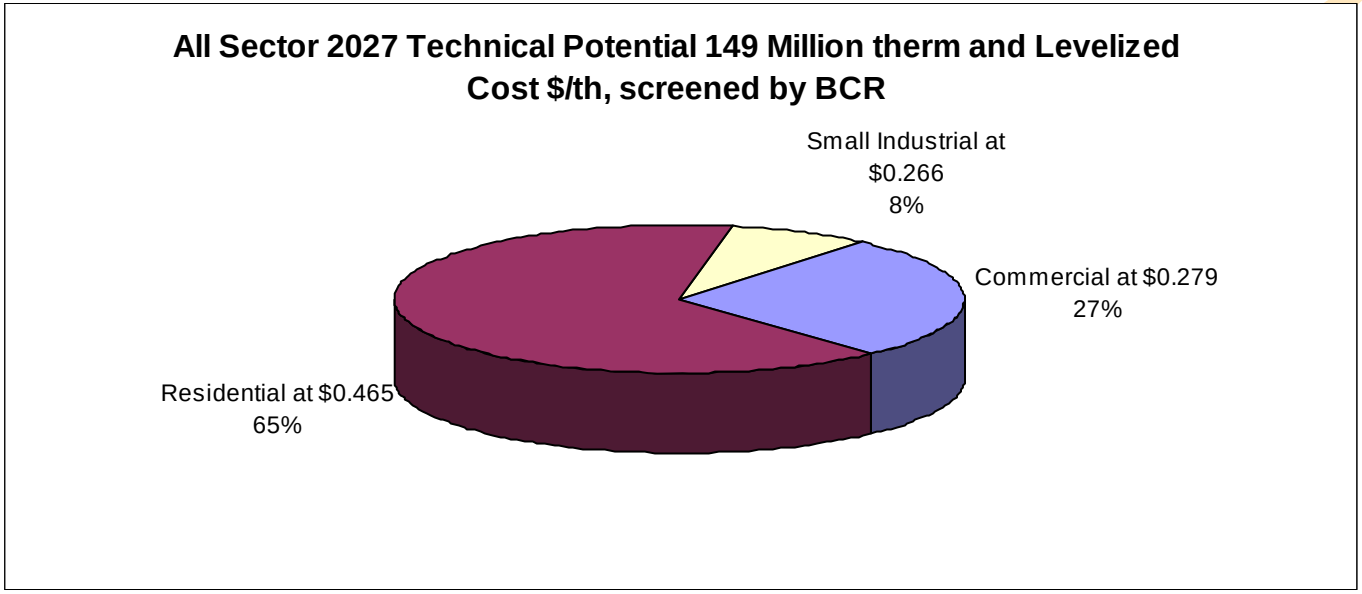
Industrial 2008 Draft Technical Potential



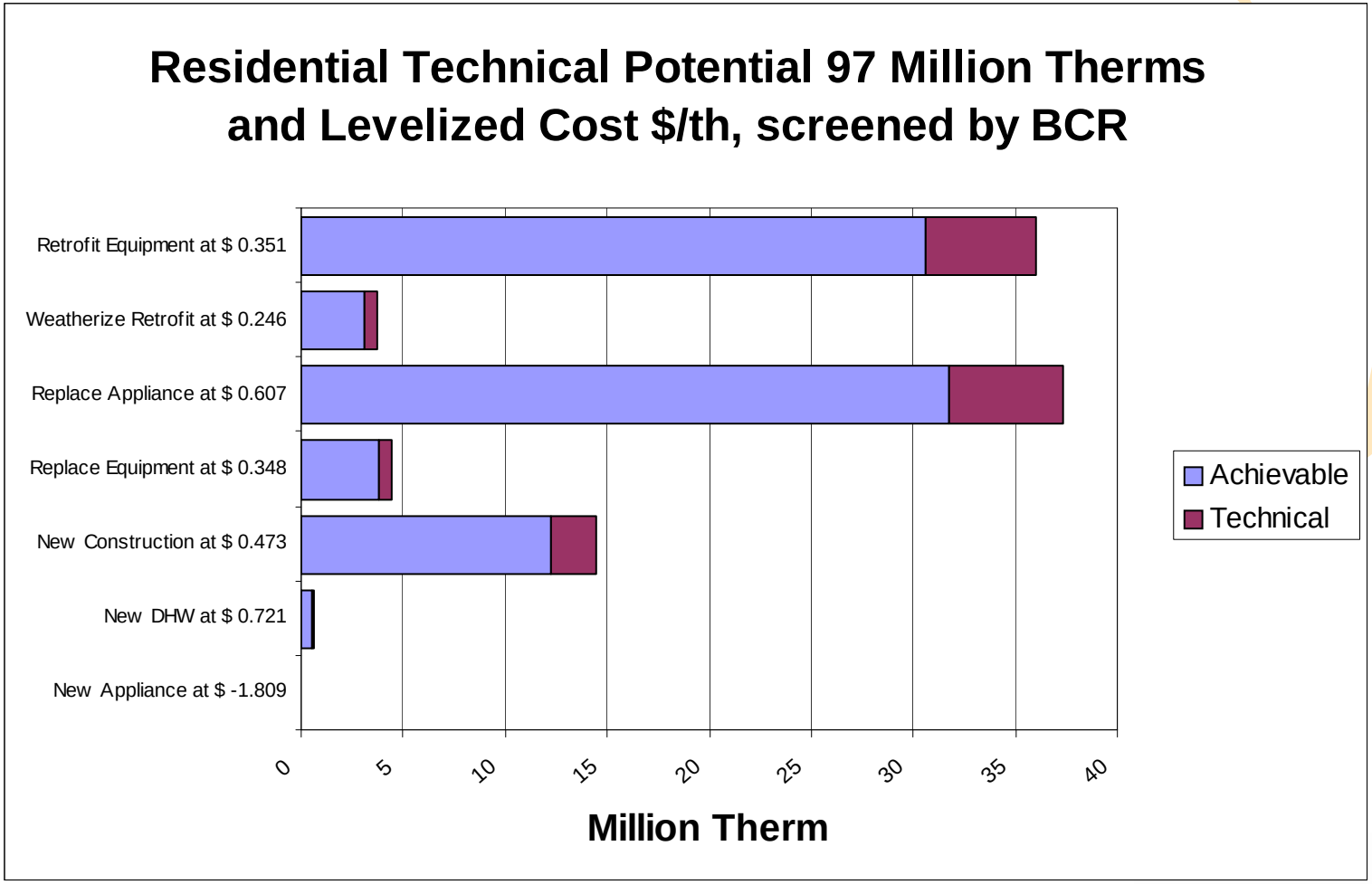
2008 Draft Supply Curve for ETO - Oregon Natural Gas Utilities



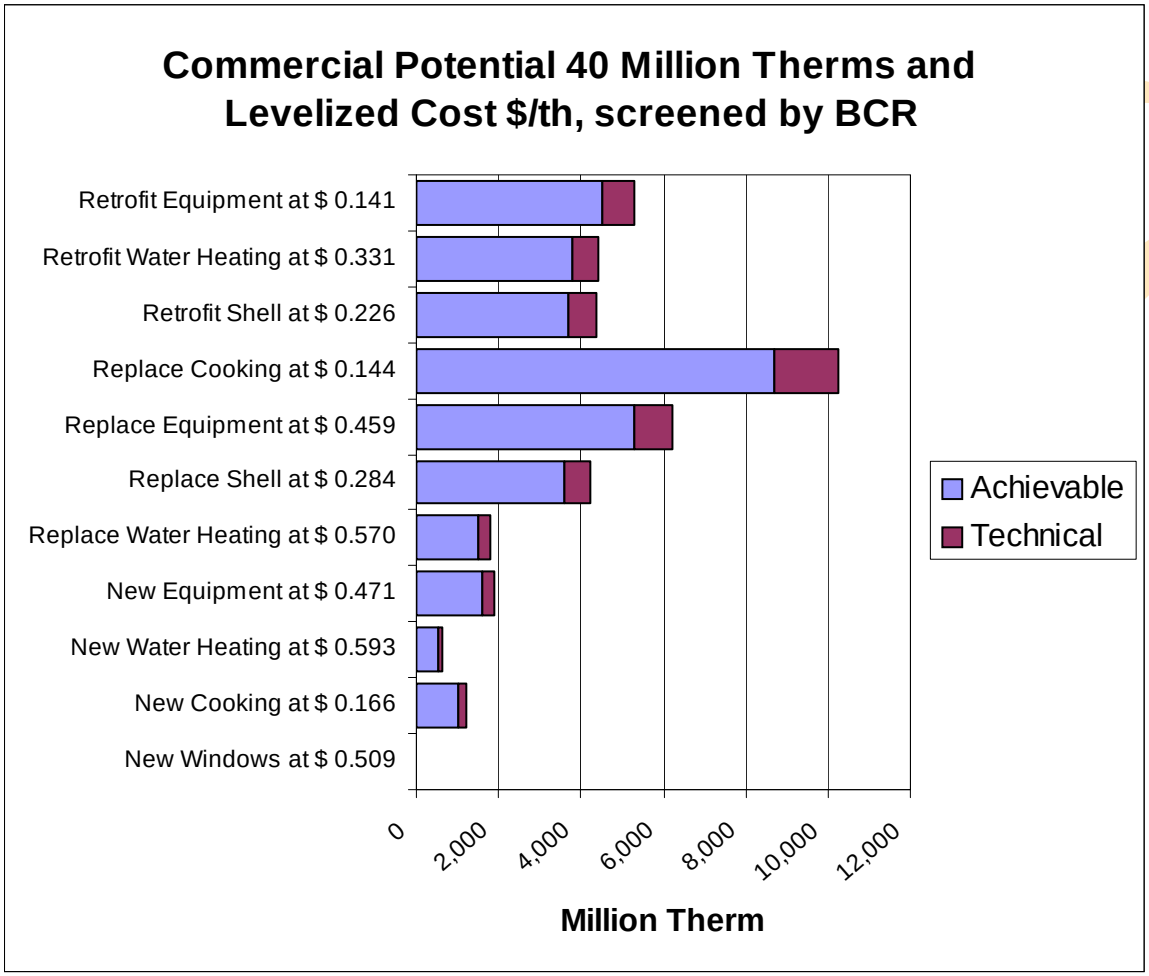
2008 Sector Percentages of Technical Potential - Oregon Natural Gas Utilities



2008 – 2027 Residential Sector Measures of Cost Effective Achievable & Technical Potential – Natural Gas



2008 - 2027 Commercial Sector Measures of Cost Effective Achievable & Technical Potential – Natural Gas



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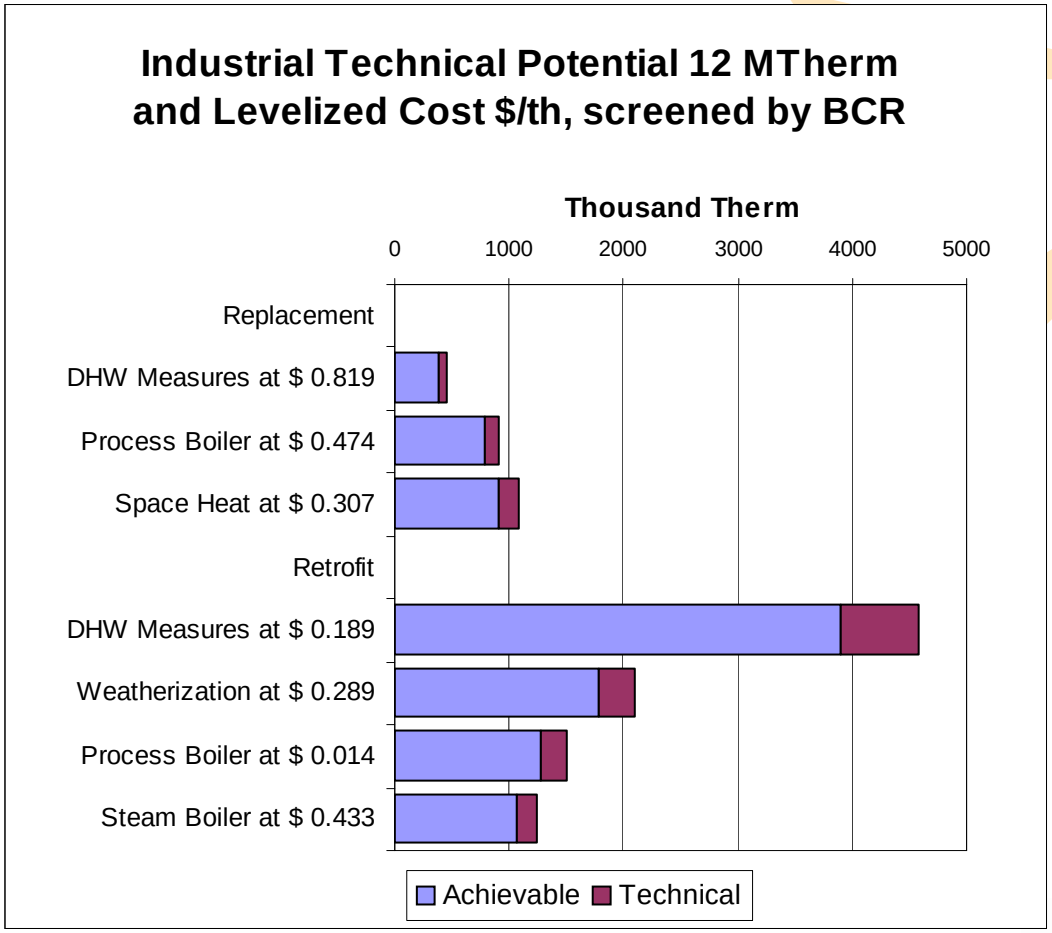
2008 - 2027 Industrial Sector and Cross-Cutting Measures of Cost Effective Achievable & Technical Potential – Natural Gas



Next Steps

- Program Budgets – Ramping in new measures, going deeper with existing programs (2 years).
- Deployment Scenarios (20 years).
- Integrate with utility IRP's