Renewable Northwest

Advocating New Generation For The Next Generation

Renewable Energy Resource Development in Montana

Energy & Telecommunications Interim Committee

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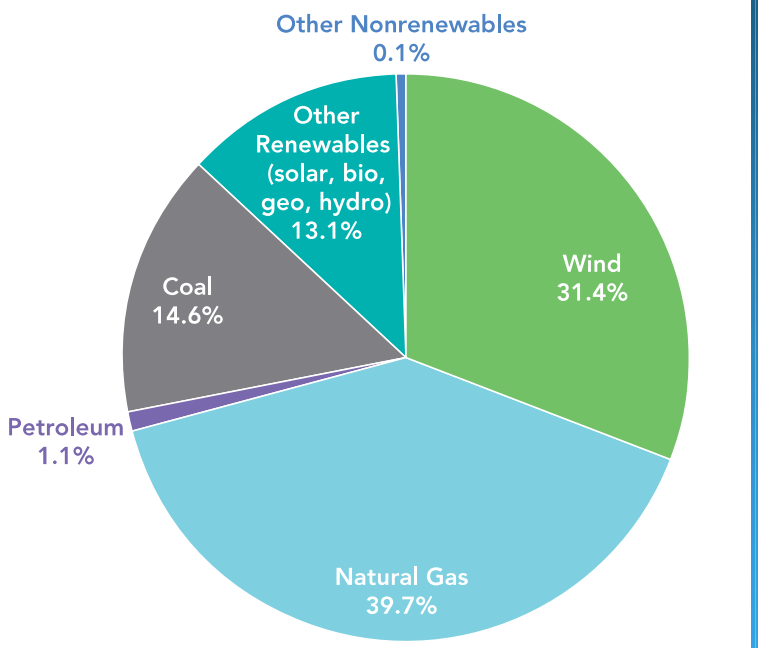
What's getting built? Natural Gas, Wind & Solar

Figure 3
U.S. Annual Power Capacity Additions, 5-year Average, 2009–2013



Data Sources: AWEA, EIA, SNL

What's getting built? Natural Gas, Wind & Solar

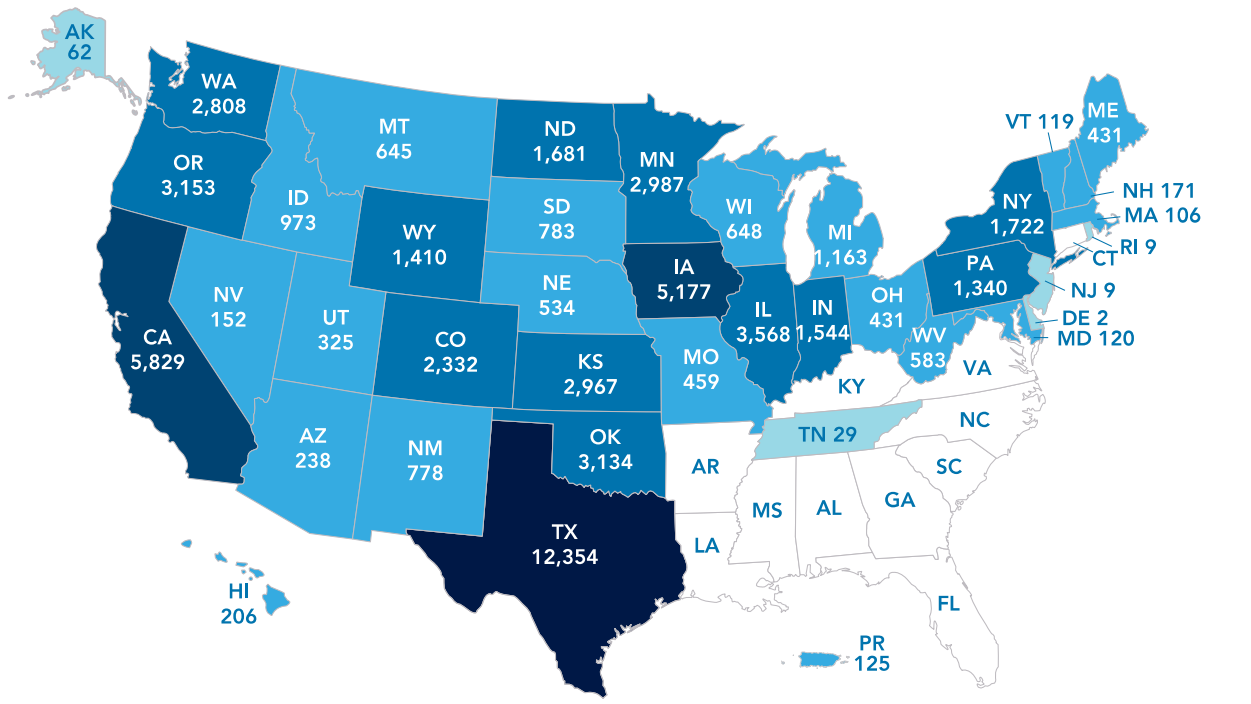
New Generation In-Service (New Build and Expansion)

	June 2014		January – June 2014 Cumulative		January – June 2013 Cumulative	
Primary Fuel Type	No. of Units	Installed Capacity (MW)	No. of Units	Installed Capacity (MW)	No. of Units	Installed Capacity (MW)
Coal	0	0	0	0	2	1,543
Natural Gas	8	63	18	1,555	41	4,498
Nuclear	0	0	0	0	0	0
Oil	1	9	2	10	6	32
Water	2	8	5	16	10	81
Wind	2	21	18	699	10	963
Biomass	2	5	28	87	53	136
Geothermal Steam	0	0	5	32	1	14
Solar	11	40	102	1,131	127	1,194
Waste Heat	0	0	0	0	1	36
Other	0	0	2	1	2	0
Total	26	146	180	3,529	253	8,496

Source: Data derived from Ventyx Global LLC, Velocity Suite.

Montana's wind energy potential is in among the top 5 States…

Figure 14
U.S. Wind Power Capacity Installations, by State



… yet we lag behind our peers & neighbors in development

Challenges & Opportunities for More Wind Development

- PTC Uncertainty
- RPS Requirements Slowing
- And…

Lack of Available Transmission Capacity is Montana's Biggest Barrier to Development

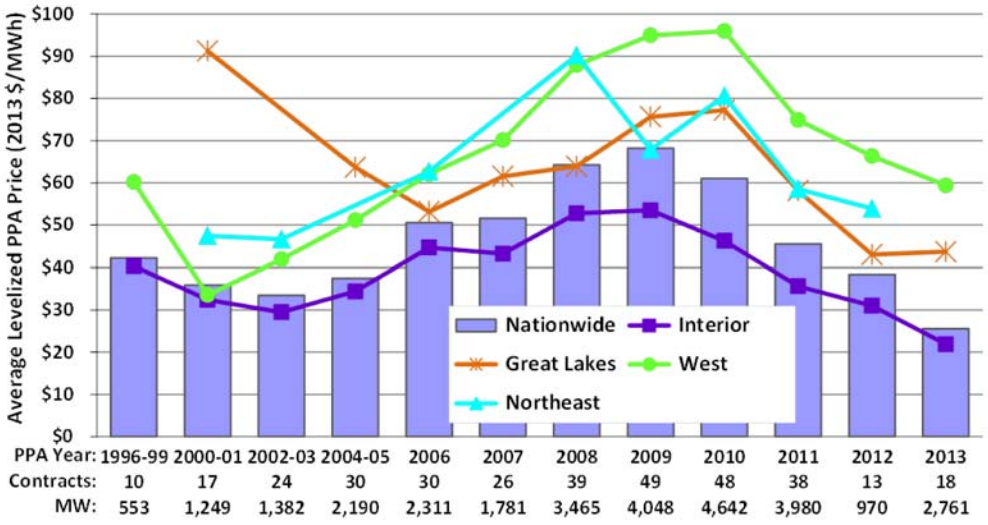
Challenges & Opportunities for More Wind Development

- RPS Increases or Similar Policy
- Retiring Coal Facilities
- Declining Cost of Wind Energy

Declining Cost of Wind

WIND AND WATER POWER PROGRAM

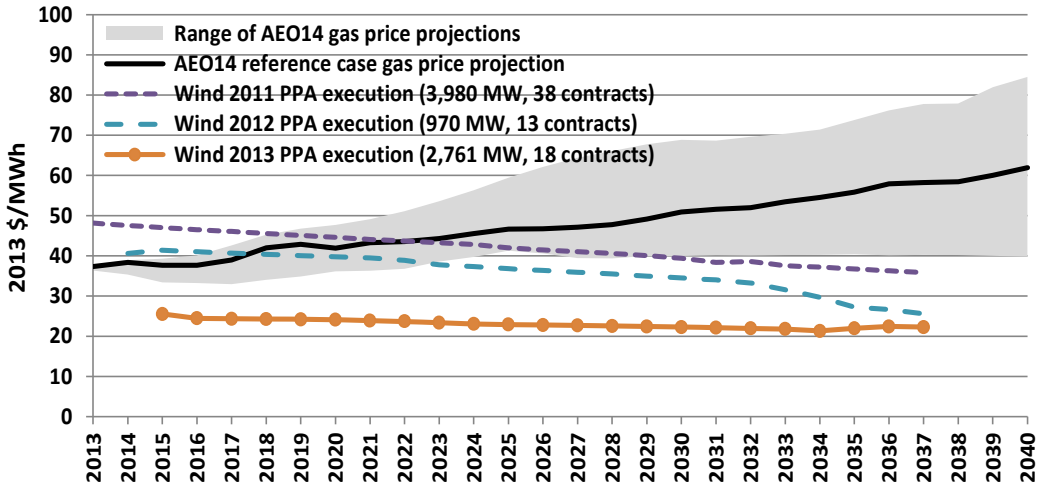
A Smoother Look at the Time Trend Shows Steep Recent Decline in Pricing; Especially Low Pricing in Interior Region



Declining Cost of Wind

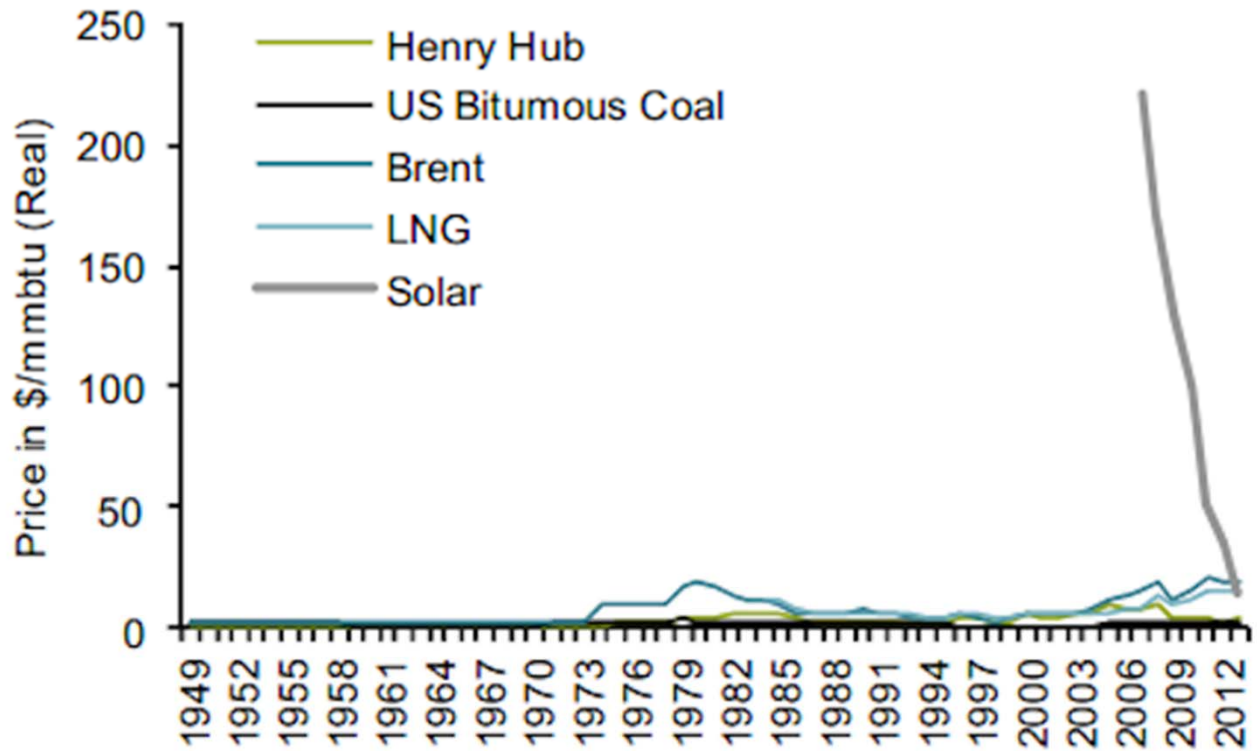
WIND AND WATER POWER PROGRAM

Recent Wind Prices Are Hard to Beat: Competitive with Expected Future Cost of Burning Fuel in Natural Gas Plants



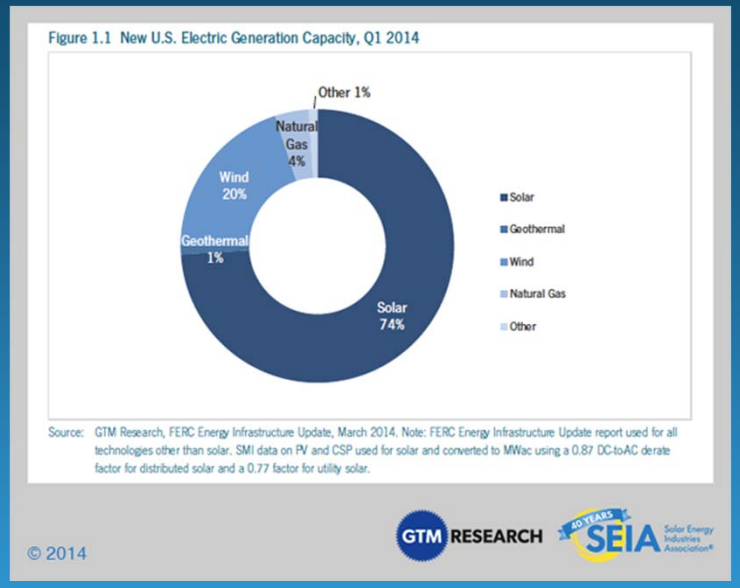
*Price comparison shown here is far from perfect – **see full report for caveats***

Declining Cost of Solar



Source: EIA, CIA, World Bank, Bernstein analysis

A Closer Look at the Solar Market



- In the first quarter of 2014, 74% of new electric generating capacity in the U.S. came from solar

- In the first quarter of 2014, 33% of the solar capacity additions were residential and commercial systems.

Barriers to Residential & Commercial Solar

- Raise the net metering cap
- Allow for meter aggregation
- Neighborhood Net Metering
- Ensure just compensation for excess production

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