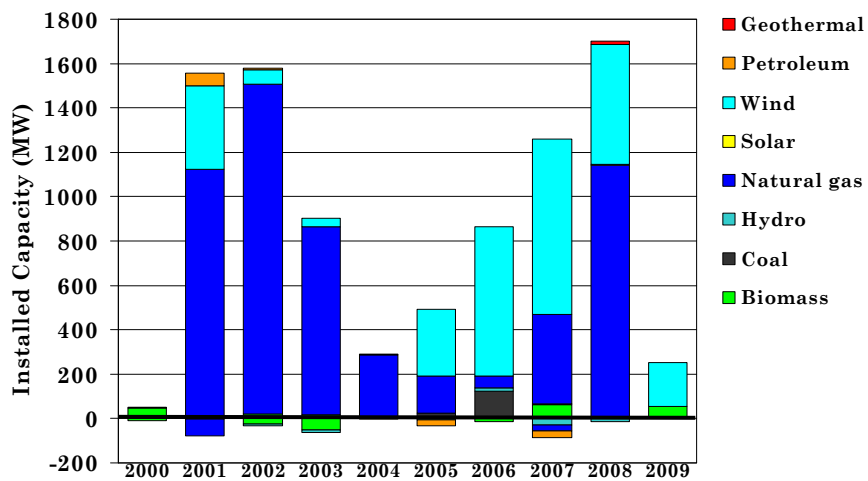


# Wind Power Development Activity

Northwest Wind Integration Forum  
December 2, 2008

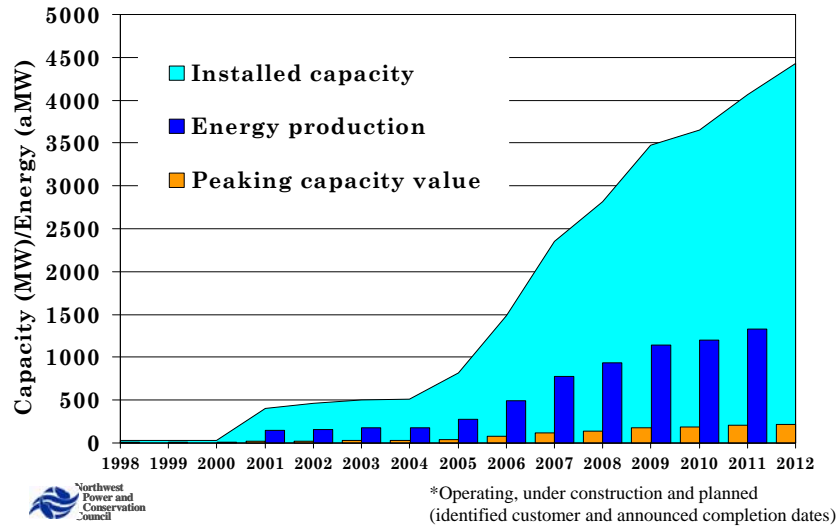


## Northwest generating project development\*

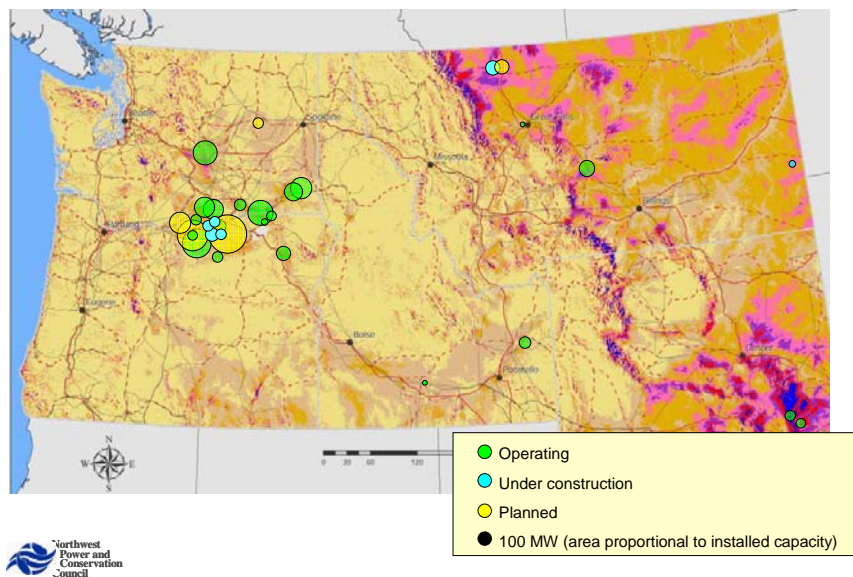


\* Committed projects (in-service or under construction)

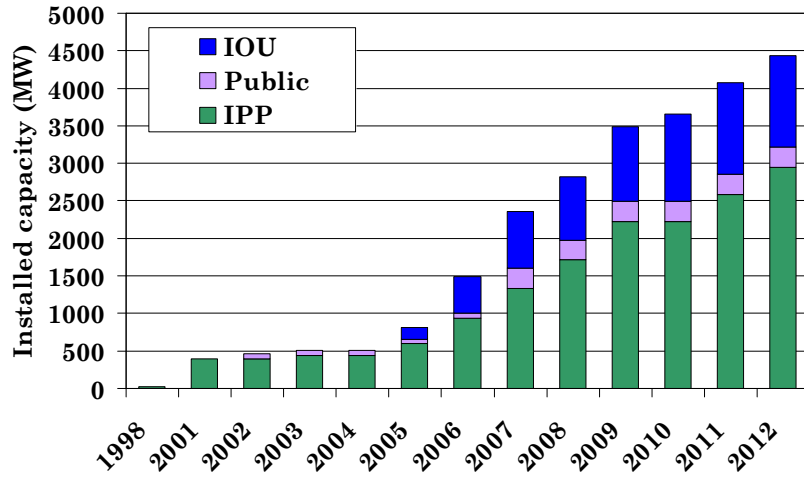
## Cumulative existing & planned wind power development in the four states\*



## Wind Project Development November 2008



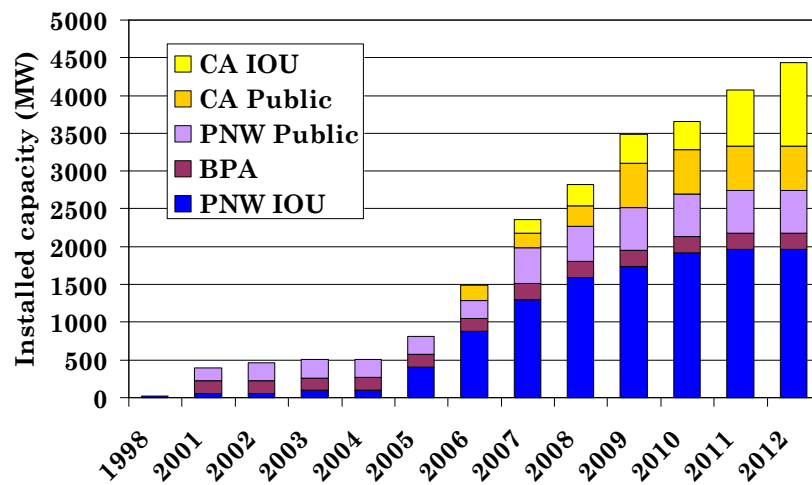
## Ownership of Northwest wind capacity



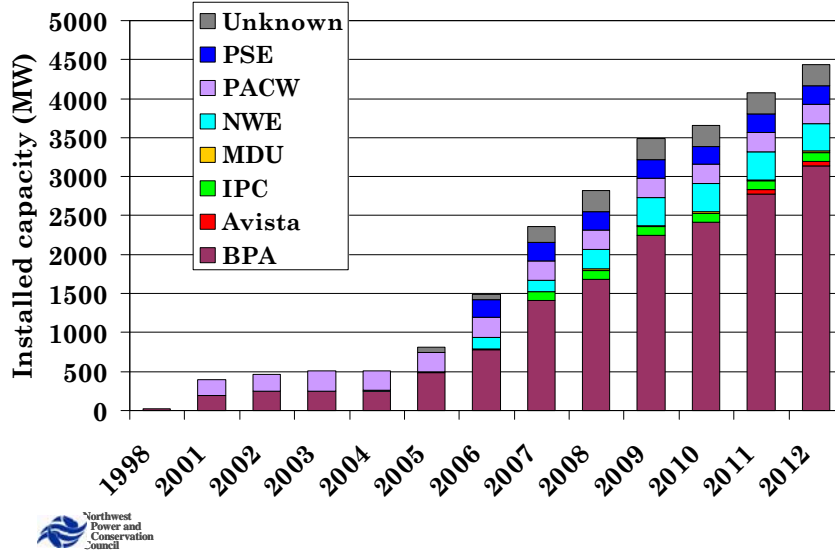
"Public" includes tax-credit driven "flip" ownership structure



## Customers for Northwest wind power



## Wind capacity by balancing authority



## Near-term development highly uncertain

- Near-term demand driven by RPS, not resource adequacy
- PNW utilities appear to be close to meeting near-term RPS benchmarks
- CA utilities appear to be far from meeting near-term (20%) benchmark in terms of operating capacity
  - Substantial contracted capacity though much of questionable credibility
  - Contracted MW, however, may satisfy RPS criteria
  - Continued CA-driven activity in PNW will depend on available transmission capacity & availability of financing