

Load Forecast Report to the Resource Adequacy Work Group

January 23, 2009

In an ongoing effort to provide an accurate picture of our regional load, PNUCC is reflecting on two current draft forecasts of our region. The draft load forecast of Council's 6th Power Plan and the draft load forecast of the Northwest Regional Forecast 2009 are compared to provide a better understanding of our region as well as a foundation for further investigation. Included are 4 graphs depicting the two load forecasts over a 10 year period beginning in 2009.

The Forecasts

Below are the key elements that define the two regional load forecasts.

- The regional area covered is roughly defined by the Columbia River Basin in the Pacific Northwest.
- The graphs reflect firm load values. The load for the Northwest Regional Forecast is based on a compilation of forecasts from the Utilities in the region.
- The load forecasts are based on normal weather conditions.
- Peak loads are based on the highest expected 60-minute clock-hour average demand for each month.
- Aluminum loads have been removed from both forecasts to provide a uniform basis of comparison.
- The forecasts treat conservation similarly. They include the benefits of efforts that were in place before 2009 and do not include any new conservation initiatives.
- The Northwest Regional Forecast peak is non-coincident. The Council's peak forecast is coincident. Based on a study by PNUCC in the 1980's the difference between a coincident peak and a non-coincident peak for January 2009 is approximately 500 MW.

Observations

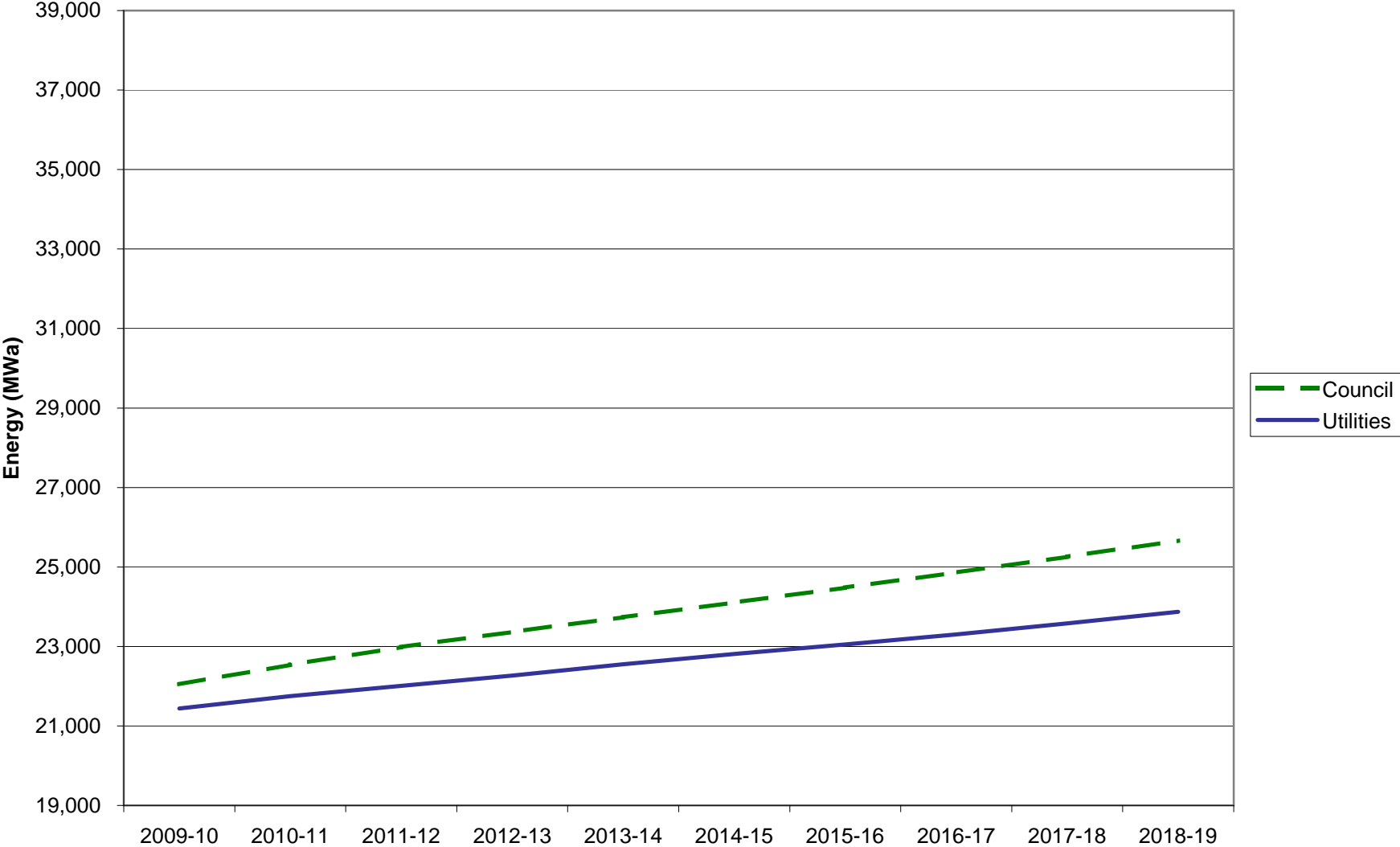
Attached are four graphs that compare the two forecasts. Below is a summary of each graph and a few observations.

- Regional Annual Energy Load - depicts the expected average annual load. The Council's estimate of near-term loads is approximately 600 MW higher than that of the Utilities. The loads look similar, although the Council forecasts a slightly higher rate of increase. These forecasts are in draft form and upcoming changes are expected produce energy values that are even more similar.
- Regional Monthly Energy Load- depicts monthly energy loads. There is a noticeable difference in seasonal load shape. The Council has a higher energy load in the winter and a lower energy load in the summer.
- Regional January Peak Load - depicts the peak load in January. The Council's near-term peak load is significantly (4,900 MW) lower than that of the Utilities. The council's peak load is forecasted to increase at a slightly higher rate.
- Regional July Peak Load - depicts the July peak load. The Council's near-term peak load is much (3,600 MW) lower than the Utilities' forecast. The Council's July peak increases at a slightly higher rate.

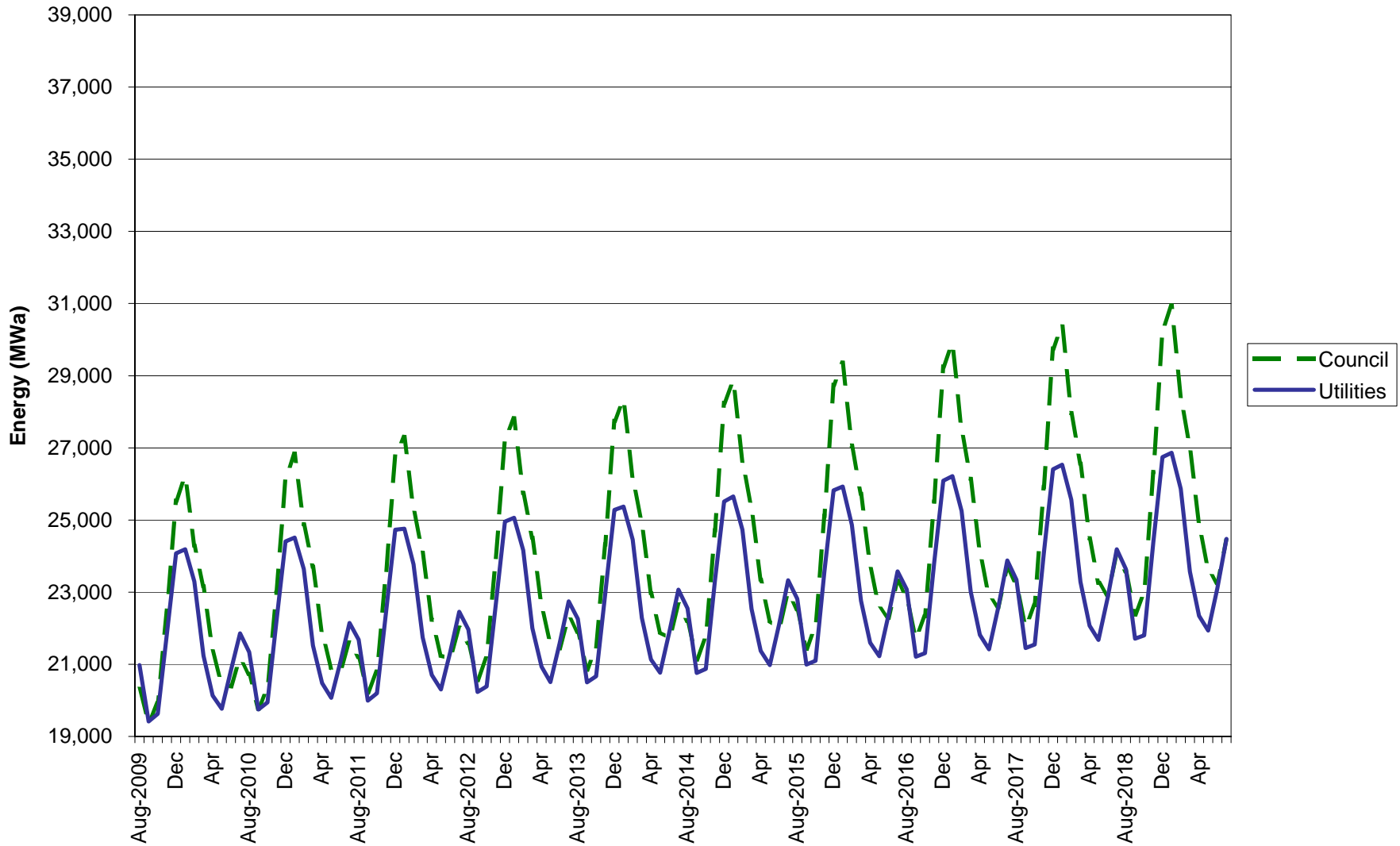
Recommendations

- Regional Annual Energy Load – Update comparison with final forecasts.
- Regional Monthly Energy Load - Investigate the seasonal shape of the forecast for the 6th Power Plan. Perhaps the Demand Forecast Advisory Committee is a suitable forum for this process.
- Peak Load Forecasts – Convene a group of forecast experts to better understand the challenges our region faces in forecasting peak loads. In addition, PNUCC will follow up with the utilities to confirm that we have properly interpreted the forecasts that they have provided.

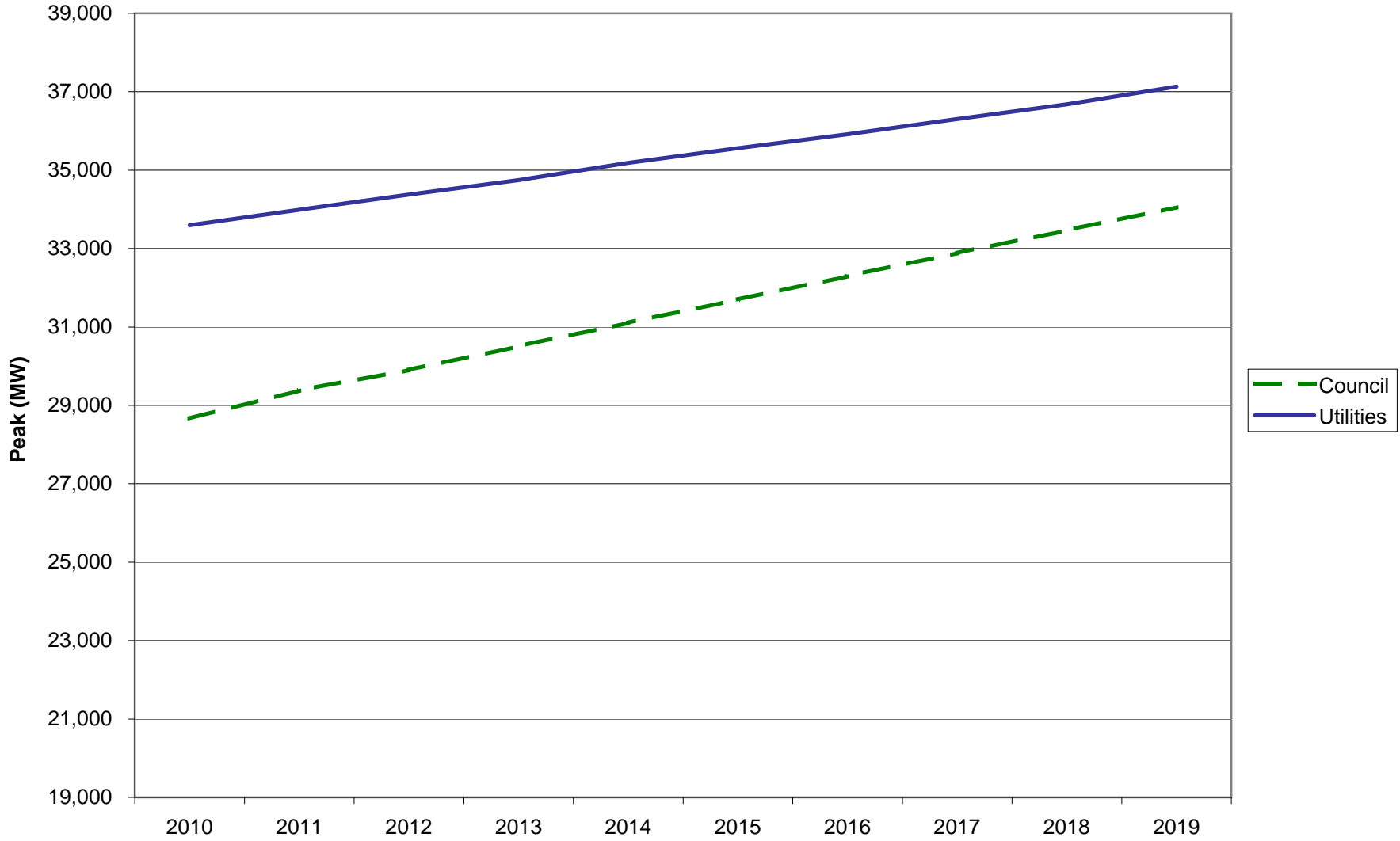
Regional Annual Energy Load



Regional Monthly Energy Load



Regional January Peak Load



Regional July Peak Load

