

What You Need to Know About



Webinar 1

June 9, 2026

Who We Are

- The NW Energy Coalition is an alliance of over 100 environmental, civic, and human service organizations, utilities, and businesses in Oregon, Washington, Idaho, Montana, and British Columbia
- Our mission: NWEAC advances clean, equitable, and affordable energy policies by leveraging our analytic expertise and convening a broad alliance of people and organizations



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Agenda

- Background on the Power Plan
- Timeline and opportunities for engagement on the 9th Plan
- Q&A
- How the 9th Plan is shaping up:
 - Demand forecast
 - Sensitivity modeling
 - Initial Staff proposals:
Resource strategy (2046 long term plan, 2032 Action Plan)
Action Plan recommendations
- Key issues and improvements
- Q&A



Webinar Ground Rules

- Please stay on mute unless the presenter asks for audience input or questions
- Please ask questions and comment in the chat throughout the webinar, however, please make sure comments are respectful to the speaker and other participants
- If providing comments or asking questions, please be mindful of how much you are speaking and make sure to share airtime with other voices





Background on the 9th Power Plan



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Northwest Power Act of 1980

In 1980, Congress passed the Pacific Northwest Electric Power Planning and Conservation Act (i.e., Northwest Power Act):

- to encourage **conservation and efficiency** in the use of electric power and the development of **renewable resources** within the Pacific Northwest
- to assure the Pacific Northwest an **adequate, efficient, economical, and reliable power supply**
- to provide for the **participation and consultation** of states, local governments, consumers, customers, users of the Columbia River system, federal and state fish and wildlife agencies, Indian tribes, and the public
- to **protect, mitigate, and enhance the fish and wildlife** of the Columbia River and its tributaries, including related spawning grounds and habitat



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The Council



Northwest **Power** and
Conservation Council

- An interstate compact agency established in April 1981 by Idaho, Montana, Oregon, and Washington
- Consists of eight members, two from each NW state appointed by their respective Governors
- Central staff in Portland and staffs in the four states; multiple public advisory committees
- Responsible for the development of the Northwest Power Plan, including the Fish and Wildlife Program, and advancing its implementation



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Power Plan Directive

The Northwest Power Act directed the Council to:

- 1) Prepare and review a “regional conservation and electric power plan” not less than once every five years
- 2) Prior to each plan, prepare and periodically amend a program to protect, mitigate, and enhance fish and wildlife affected by the Columbia River Basin hydropower system
- 3) Develop both the power plan and the fish and wildlife program in a highly public process with broad consultation and participation



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What is the Power Plan?

- 20-year plan that aims to ensure an adequate, efficient, economical, and reliable power supply for the NW region while mitigating adverse effects on fish and wildlife
 - 6-year Action Plan window
- Key energy analyses in the Plan include:
 - Electricity demand forecast
 - Electricity and fuel price forecasts
 - Assessment of cost-effective energy efficiency and demand response
 - Least-cost generating resources portfolio
 - A resource strategy that meets adequacy metrics
 - Other recommendations



Why is the Power Plan important?

- Provides guidance to the Bonneville Power Administration on resource procurement, energy efficiency, fish and wildlife protections, and other energy issues.
- Informs other energy planning and action in the region:
 - Insights into key questions of the day such as load growth and decarbonization
 - The region's utilities, regulatory commissions, and policymakers can use the Plan and its findings to inform decisionmaking
 - Trusted source of regional information, analysis, and vision since 1983



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9th Plan Timeline and Opportunities for Engagement



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9th Plan Fish & Wildlife Program

- **Draft issued Dec 2025, public comment closed Mar 2026**
- Final Program under review by the Council, possible adoption in June or July
- Council must also prepare a detailed response to more than 1300 comments from states, Tribes, and the public

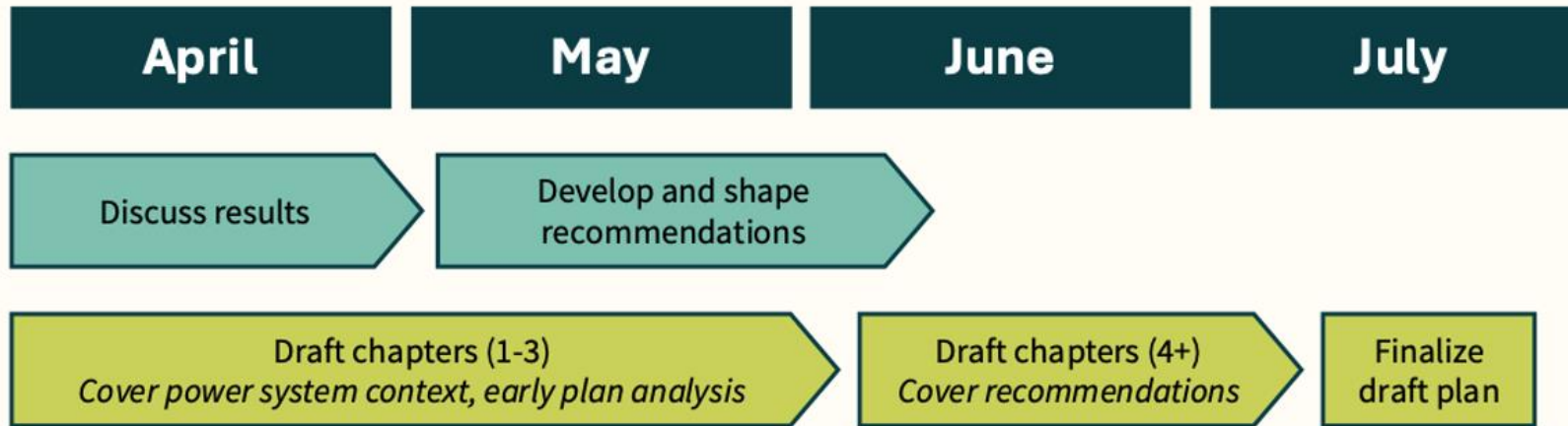


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Draft 9th Power Plan Development

Draft – Subject to Change

The Road Ahead



Current Comment Opportunities (June-July)

- The Council is currently reviewing staff modeling, resource strategy, and recommendations
- Public comment at the end of each public meeting, written comments, informal discussion with Council members and staff
- Council meetings:
 - June 16-17 (Portland)
 - June 30-July 1 (online)
 - **July 14-15 (Portland, possible approval of Draft Plan)**, late July if needed (online)



Draft Plan Public Comment Period (July-Sep)

Draft Power Plan public comment period

- 60 day minimum (Council can extend)
- Current expectation: July 21 to September 18

Formal hearings for public comment

- At least 1 in each state required
- Council usually schedules 1 or 2 per state plus online options
- Likely starting early August

Written comments via online form or email

- Online form can include free form comments and attached documents

Public comment at Council meetings

- August 11-12 (Seattle), September 9-10 (Portland)



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9th Plan Overarching Campaign Priorities

- Energy efficiency, demand response and data center flexibility are maximized
- Clean energy (including storage) prioritized for new resources
- Strong fish protections included as a baseline for power planning
- Compliance with state and utility clean energy priorities
- Prioritize affordability, resource adequacy and reliability

Mobilize diverse and effective public comments on the Draft 9th Plan from NWECC members and partners including Tribes, clean energy businesses, and state and local governments



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How is the 9th Power Plan Shaping Up?



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Demand Forecast

- The Council does a very thorough forecast for changes in Northwest power demand over the next 20 years
- The forecast shows unprecedented and sustained demand growth with a very large range of uncertainty
- For the next decade, data center and high tech demand growth is the biggest factor
- Unlike previous Plans, conservation (energy efficiency) cannot mostly cover the potential demand growth
- However, as discussed below, the Council staff is focusing on the importance of prioritizing high value/low regrets conservation



Demand Forecast

- Developed five pathways of load growth reflecting a range of assumptions across different sectors to account for uncertainty in timing, size, and shape
 - Economics
 - Transportation
 - Data centers and high-tech
 - Building electrification
 - Hydrogen (or industrial electrification)
- Future energy demand increases between 50 and 100% over the next 20 years
- Peaks also grow significantly, doubling in some of the pathways by the end of the study

Demand Forecast Pathways

Pathways	Economics	Transportation	Data Centers	Building Electrification	Hydrogen
Persistent high growth	Medium	Higher	Higher	Higher	Higher
Persistent low growth	Lower	Lower	Lower	Lower	Lower
Early growth	Medium	Lower	Higher	Lower	Lower
Late growth	Medium	Higher	Medium	Higher	Higher
Mixed bag	Medium	Higher	Medium	Lower	Lower

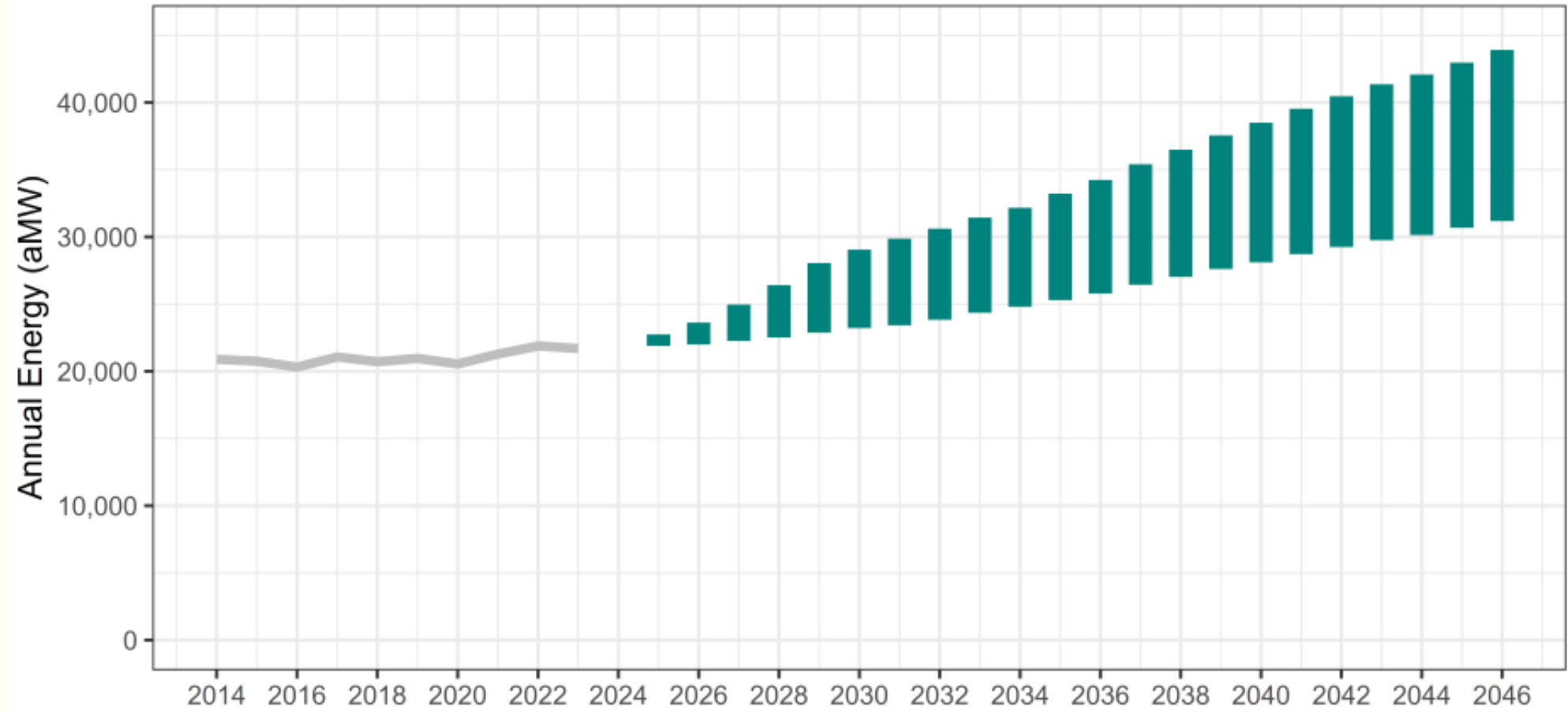
Demand Forecast, Energy



Demand Forecast, Peak

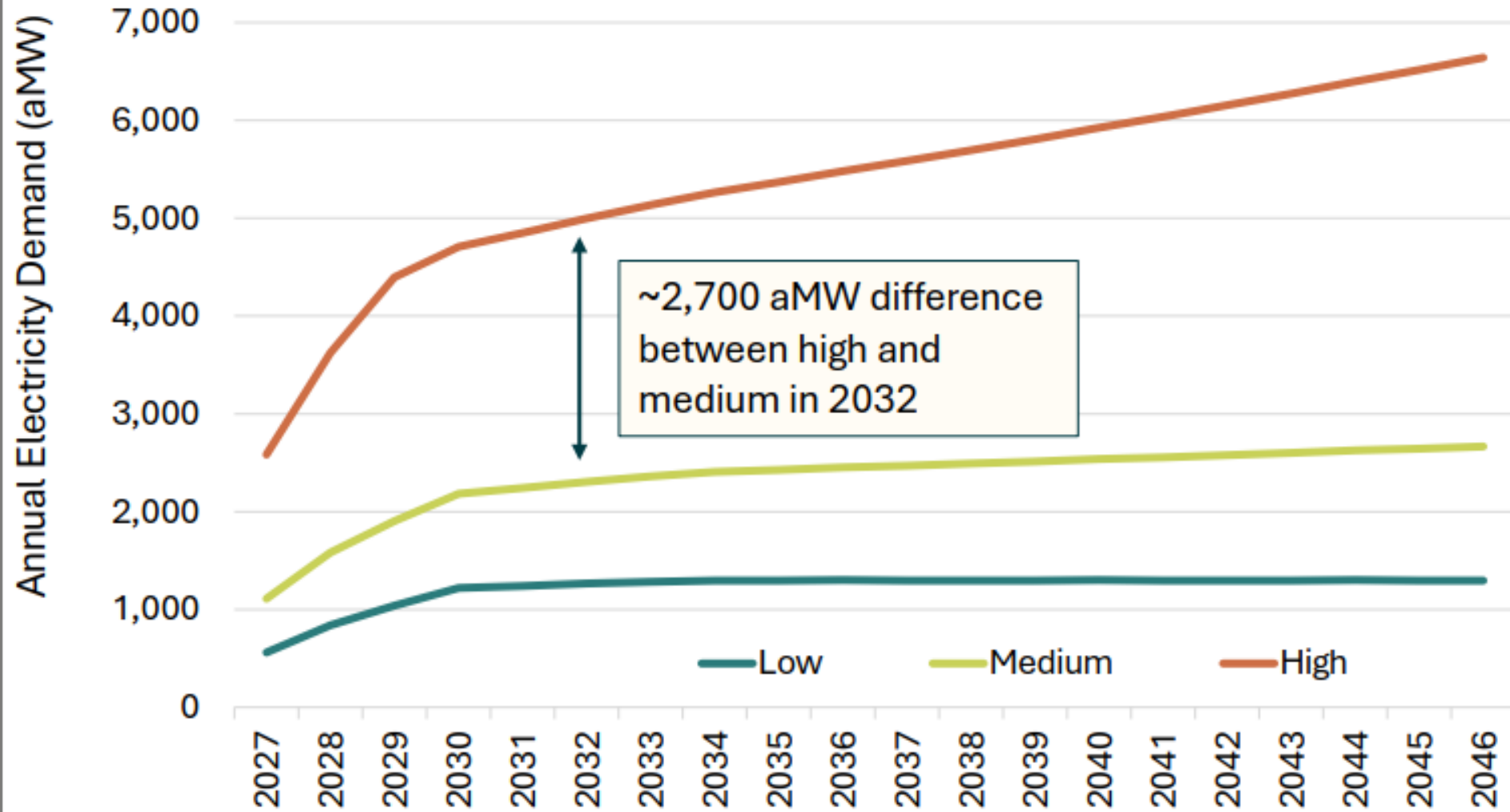


Energy Demand Range for Climate A



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Ninth Plan Tech Load Forecast



Sensitivity Modeling

- The Council staff prepared 13 sensitivities (different combinations of demand, generation and system conditions) for the next 20 years
- The sensitivities include existing and available resources (conservation, demand response, wind, solar, conventional geothermal, natural/methane gas and storage)
- The sensitivities provide guidance for the Council's adoption of a 20-year resource strategy for 2046 and targets for the 2027-2032 Action Plan period



Scope – Sensitivities

See cheat sheet!

New Resources and Transmission Risk

Constrained Resources and Transmission

Changing Transmission Availability

Changing Emerging Technology Costs

Limited Short-Duration Storage Availability

Slower Demand Side Resource Availability

Evolving Federal Policy Landscape

Changing Hydro Operations

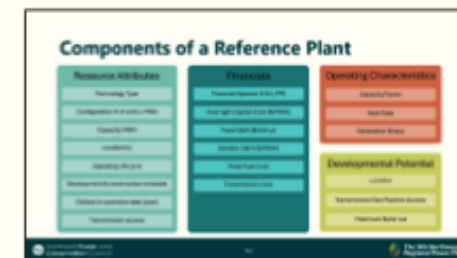
2020 BiOp Flex Spill Operation

2023 RCBA Operation

Recommended Spill and MOP Targets

Limited Flex Operation

New Generating Resource Potential



Primary

- ⚙️ Utility Scale Solar PV
- ⚙️ Onshore Wind
- ⚙️ Small Scale Renewables
- ⚙️ Gas Combined Cycle
- ⚙️ Gas Simple Cycle
- ⚙️ Battery Storage (Li-Ion)
- ⚙️ Renewables + Storage

Limited Availability

- ⚙️ Conventional Geothermal
- ⚙️ Offshore Wind
- ⚙️ Pumped Storage
 - Biomass
 - Hydro Upgrades
 - Biogas
 - Small Hydro
 - Combined Heat and Power

Emerging Technology

- ⚙️ Clean Baseload
- ⚙️ Clean Long Duration Storage
- ⚙️ Clean Peaker/Medium Duration Storage

⚙️ Generating resources explicitly modeled

See cheat sheet!



Selected Modeling Results



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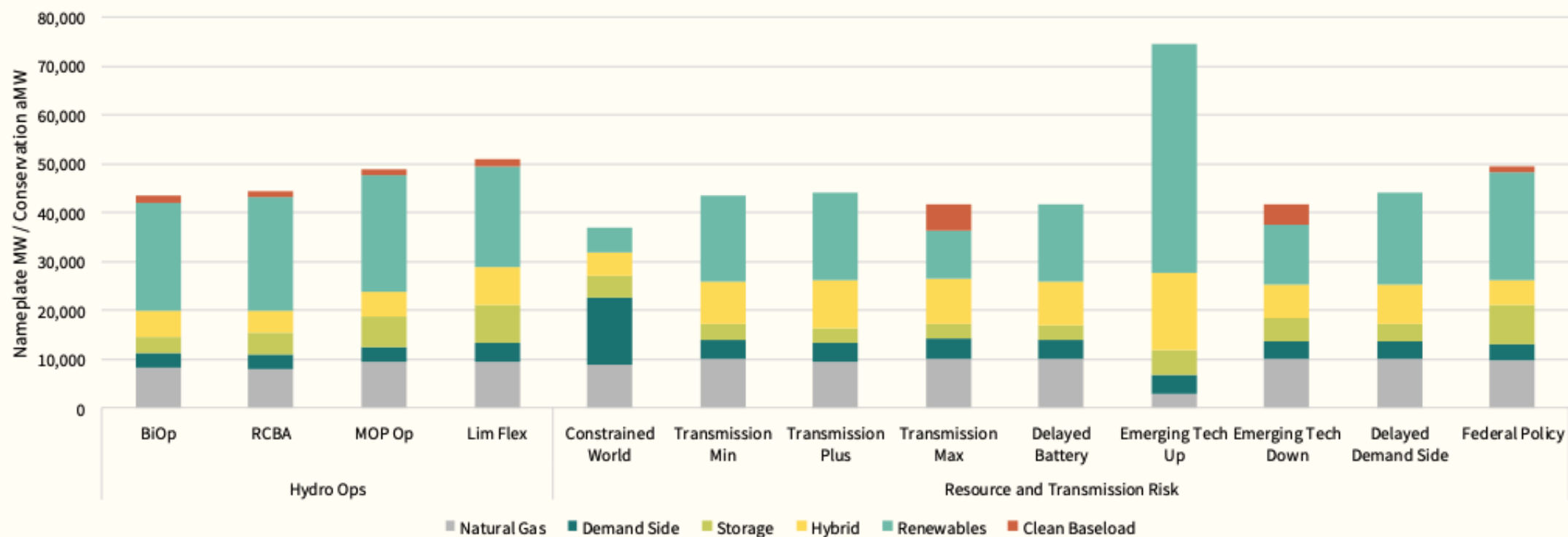
Total Buildout in 2046



Conservation is in energy (aMW), while the rest are in terms of nameplate capacity (MW)



2046 Buildout Across Sensitivities



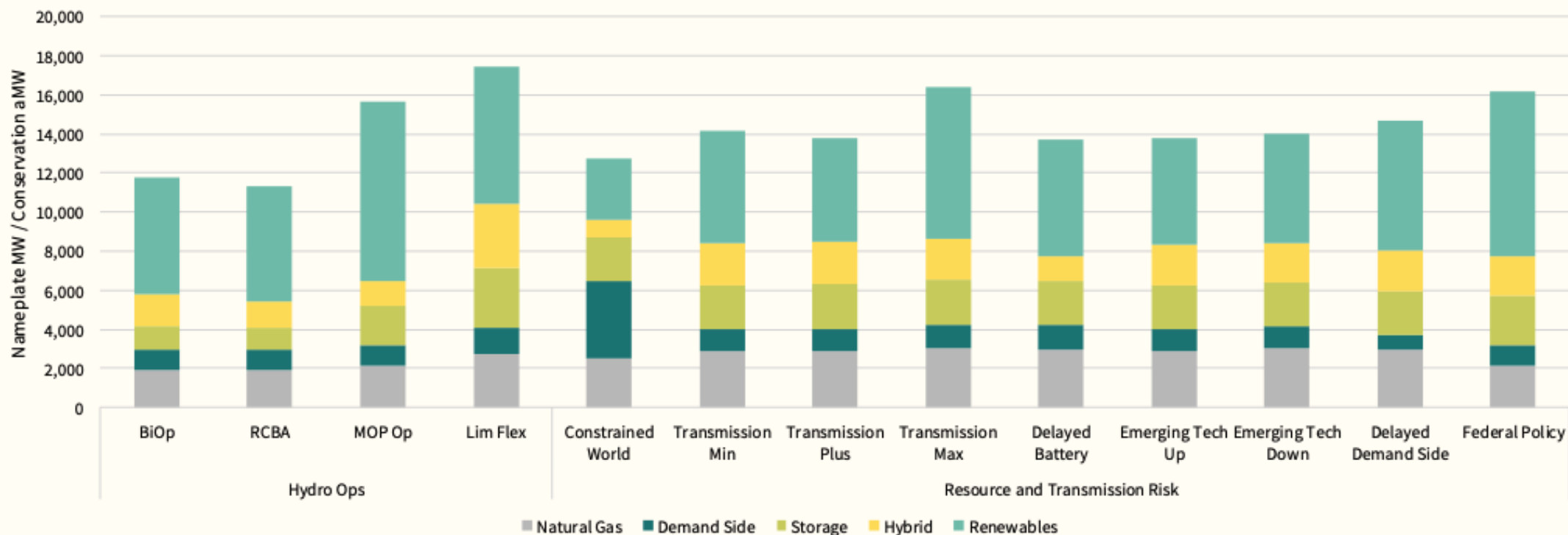
Total Buildout in 2032



Conservation is in energy (aMW), while the rest are in terms of nameplate capacity (MW)



2032 Buildout Across Sensitivities





Initial Council Staff Resource Strategy and Recommendations



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What is a Resource Strategy?

- The resource strategy is the core piece of the power plan, setting for a recommendation for new resources and amounts to meet the region's needs
- It directly connects to the Power Act requirements around:
 - “The plan shall set for a general scheme for implementing conservation measures and developing resources ... to reduce or meet the Administrator’s obligations”
 - This “general scheme” is to give due consideration to environmental quality, compatibility with the existing system protection of fish and wildlife, and other criteria that the Council sets forth
 - Elsewhere, the Act requires the plan provide a forecast of resources and amounts of those resources to meet the Administrator’s obligation
- This resource strategy can then be supported by other recommendations



Key Theme: Portfolio of Resources

- A portfolio of resources will be needed to meet needs
- In the Action Plan period (2027-2032)
 - Conservation, demand response, wind, solar, battery storage and natural gas show up in every sensitivity in all years available
 - Long duration energy storage also shows up in all but two, one when it is not allowed in the study and one when the costs are 50% higher
- Over the 20-year period
 - Conservation, demand response, wind, solar, storage, and natural gas continue to play a role
 - Conventional geothermal and clean medium duration storage also show up in every sensitivity
 - Clean baseload shows up in 2046 in about half the studies
 - The remaining three resources (rooftop solar, pumped storage, and offshore wind) only show up in one sensitivity each, meaning there is not a strong signal for these resources



Role of Recommendations

- In addition to the resource strategy, the Council's plans are to include:
 - Conservation program
 - Model conservation standards (a required element of the energy conservation program)
 - Recommendations for research and development
- The Council has always included supporting recommendations to the resource strategy to cover these requirements, as well as to highlight specific areas that require attention in order to help ensure effective implementation of the policy
- Staff has compiled a suite of proposed supporting recommendations to provide a starting point for discussion and solicit refinement and addition from members



Order of Topics

- Conservation program elements
- Demand response
- Supply side resource development
- Data centers
- Transmission and markets
- Emerging technology
- Other research and development recommendations



Transition Slide

Topic

- **Issue:** This is the challenge that staff (or advisory committee members, or others) have articulated.
- **Recommendation:** This is an initial staff proposal on a recommendation to address this issue.



Options Building on Initial Test Strategy

Resource	Option 1	Option 2
Conservation	1,060 aMW \$150/MWh OR & WA (860 aMW) \$70/MWh ID & MT (200 aMW)	950 aMW \$100/MWh OR & WA (800 aMW) \$60/MWh ID & MT (150 aMW)
Demand Response	590 MW	
Voltage Regulation	220 MW	
Renewables	9,000 MW + 335 MW wind	9,000 MW
Storage	5,200 MW	
Natural Gas	2,000 MW	2,250 MW

We'll come back to these specifics, but first let's walk through the rationale behind each of these resources



Key Issues and Improvements

work in progress!



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Staff Recommendations for 2032: *good*

Fully supports **state clean energy policies** (WA, OR) and utility targets

Solid 2032 Action Plan resource strategy recommendations for conservation/EE, renewables and storage:

- **1060 MW regional conservation**
 - **435 MW for BPA conservation**
- **9000 MW renewables** (wind/solar/hybrids), **5200 MW storage** (including hybrids), good locational diversity across the region

Many positive **Action Plan recommendations** for conservation, renewables, storage and transmission



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Staff Recommendations for 2032: *needs more review*

- 2000 MW of new gas (mostly peakers)—does not fully incorporate **new pipeline capacity costs** (billions of dollars, 4-6+ years) and **new gas plant costs**—which will reduce new gas selection

Gas plant type	Council input cost	Current cost
Combined cycle (60% capacity factor)	\$1,500/kW	\$3,000/kW (EPRI)
Peaker (simple cycle, reciprocating engine, etc.)	\$1,078/kW	\$2,500/kW (Austin TX)



Staff Recommendations for 2032:

programmatic DR/data centers—missing in action

Staff focuses on two kinds of demand response (DR):

- 220 MW distribution voltage reduction (utility measure)
- 590 MW general DR, mostly EV time-of-use (rate measure)

Staff does not recommend most available programmatic DR

- model prefers gas and hybrids providing both energy/flexibility—that blocks most programmatic DR (next slide)

For data centers, staff recommends model conservation standard (MCS) but no target amounts for load management/flexibility

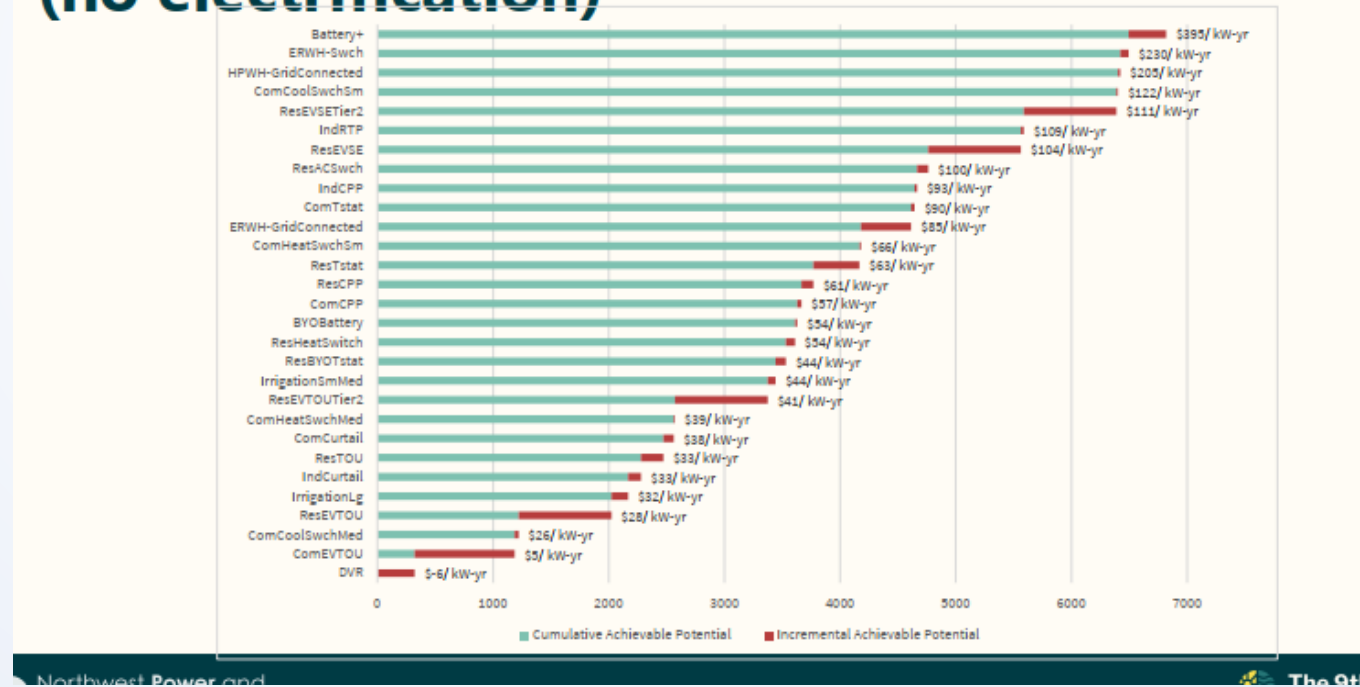
- largest amount of demand forecast variability
(new tech demand will grow 2000-5000 MW by 2032)
- the achievable amount for flexibility is certainly way above zero!



Available NW demand response is very large

- Programmatic DR includes many well-established measures: residential HVAC and water heaters, commercial, industrial and irrigation equipment
- 6500 MW of DR potential by 2046 at less than the cost of new gas
- At least half of DR potential could be available by 2032

Example Demand Response Supply Curve (no electrification)



Staff Recommendations for 2032:

Proposed OR/WA and ID/MT split conservation target needs a reset

Proposal: Two Targets

- Develop two targets: (1) OR & WA and (2) ID & MT
- Results suggest more than 2 targets, but this approach seeks to both recognize the locational realities while minimizing some of the implementation complexity

Washington & Oregon

- Load growth exists, but there is more limited resource potential
 - Limited renewable potential west of the Cascades
 - Statewide clean policies limit natural gas availability and economics
 - Transmission constraints limit near-term potential to bring remote resources to load
- These factors increase the value of conservation for ensuring resource adequacy, and therefore more conservation is part of a cost-effective portfolio

Idaho & Montana

- Load growth exists, but there are more resource options available in these states
 - Greater renewable potential
 - Natural gas is a more available and a more economic option (even when meeting utility goals)
 - Greater transmission connectivity to the broader west
- These factors results in conservation being cost-effective only up to the comparable price of natural gas and renewables



Proposed OR/WA and ID/MT split conservation target needs a reset

- Staff has (limited) modeling to support—for the first time ever—multiple conservation target zones
- Separation of single conservation target would break precedent from 8 previous NW Power Plans
- Climate zones are very different within and across state boundaries (ex: Puget Sound, Portland-Vancouver, Columbia corridor, eastern WA)
- Publicly owned and investor-owned utilities within climate zones are very different
- Would reduce east side weatherization and make BPA conservation program coordination across the region impossibly complicated



Summary: Areas for Improvement

Rebalance the resource strategy:

- Full accounting for new gas power plant and pipeline costs
- Recognize full availability of cost effective programmatic DR
- Adopt a provisional target for data center load management
- Increase transmission limits from California/Southwest (currently 2500 MW winter/1500 MW summer) to 4000 MW winter/2500 MW summer

Do not force in poorly designed conservation zones along state boundaries

Recognize the value of a strong 9th Power Plan for fish and wildlife protection



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9th Plan Overarching Campaign Priorities

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- Compliance with state and utility clean energy priorities
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Mobilize diverse and effective public comments on the Draft 9th Plan from NWECC members and partners including Tribes, clean energy businesses, and state and local governments



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Reminder on Upcoming Actions

- Continuing dialogue with the Council and staff
- Draft 9th Plan release expected in mid-July (*July 21 target date*)
- Organizing around the public comment period on the Draft 9th Plan—July-September
- Stay tuned for the second NWECC 9th Plan webinar! (*Date TBD*)

NW Power and Conservation Council

<https://www.nwcouncil.org/calendar/>

<https://www.nwcouncil.org/energy/ninthpowerplan/>

NWECC

fred@nwenergy.org

zach@nwenergy.org



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Thank You!