



## Status of Renewables in Oregon 2025

- In 2021 it was estimated that to meet HB2021's 80% (2030) mandates, PAC and PGE would need to procure **~2,750 MW** of new renewable energy\*
- Since 2021 - major load growth and several barriers to procurement have risen
- New estimates of procurement needed between 2021 and 2030 to meet 80% mandate = **~3,500 MW** (*assuming 30% increase in load 2023-2033*)

\* <https://olis.oregonlegislature.gov/liz/2021R1/Downloads/PublicTestimonyDocument/30290#:~:text=Estimated%20Demand%20for%20New%20Renewables,renewables%20projected%20for%20this%20decade.>



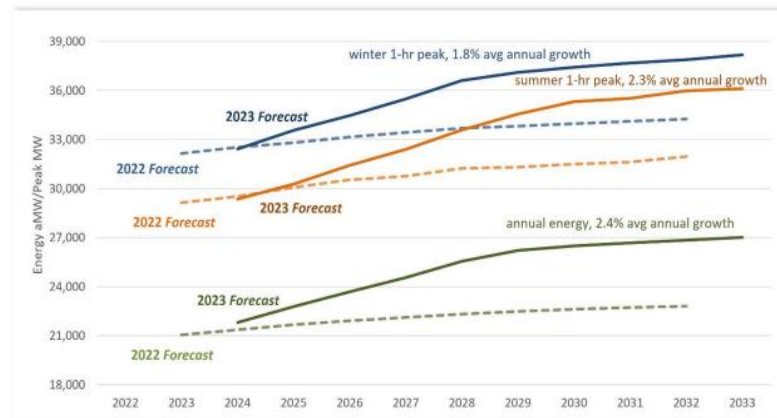
# Regional Procurement and Forecasts

- 2021 load growth was **relatively flat**
- 2023 was first year **load growth assumptions jumped**
- Current projections are **30% load growth over next 10 years** (*electrification, higher electricity usage, data center/AI growth*)
- In 2024 utilities planned to procure **4,400 MW** and actually only procured **1,200 MW**

## Loads Show Up with More Certainty

The 2023 *Forecast* reflects accelerated and steeper regional load growth compared to previous years. Much of this load growth is attributed to more certainty in prospective new industrial loads over the next five years.

Figure 1: Load Forecasts Comparison 2023 vs. 2022



# Utility Planned Procurement

## Resource Builds (MW) by 2030

	PAC	PGE	IPC	PSE	Avista	NWE
Solar	2,092	1,089	745	700		
Wind	2,267	1,362	700	1,400	400	
Storage	1,684	1,250	705	1,000		
LDES	511					
Hybrid				1,450		
Nuclear						
Gas			450		90	
'Clean Peakers'				711		
Total	6,554	3,701	2,600	5,261	490	0

Sourced from IRPs





# Oregon Utility Procurement Status Since Passage of HB2021

## PacifiCorp

- Wind/Solar: 3,301 MW total; ~825 MW in Oregon
- Storage: 1,072 MW total; ~268 MW in Oregon

*(given 6 state service territory, assumed rough estimate of  $\frac{1}{4}$  allocated to OR)*

## PGE

- Wind/Solar: 661 MW
- Storage: 492 MW

What's left to get to 2030???

Assuming **3,500 MW** of new generation is needed:  
**2,014 MW** more needed to meet 80% mandate

Assuming all storage is used to offset load, that can be reduced to **1,254 MW**

*\* These estimates drawn from publicly available data*





# In-State Build: Wind/Solar

Most unlikely to  
make IRA phase out  
date requirements

- Operational Since 2021
  - 410 MW of Wind
  - 327 MW of Solar
- Permitted (EFSC) awaiting transmission/procurement\*
  - ~2,800 MW
- In Permitting (EFSC)\*
  - ~3,189 MW
- Under Construction (EFSC)\*
  - 200 MW

*\*does not include county permitted projects*







## Challenges - *uncertainty at an all time high*

- **Wildfire Liability** - utility credit ratings are down, spending more time managing risk and reliability. IPPs concerned about viability of utilities.
- **Transmission Constraints** - BPA interconnection backlog and delays in upgrades and new TX (*most planned upgrades won't come online until post 2030*)
- **Siting Challenges** - it is harder than ever to get projects permitted
- **5 Federal Executive Orders and 12 Secretarial Orders/Memos** - no issuance of federal permits for wind/solar (even on private lands)
- **HR1** - loss of tax credits and FEOC provisions will make it more expensive going forward to procure RE



# Executive Orders

EOs	Name/Focus	References
<a href="#">Jan 20</a>	<i>Temporary Withdrawal of All Areas on the Outer Continental Shelf.....</i>	
<a href="#">14154</a>	<i>Unleashing American Energy</i>	
<a href="#">14156</a>	<i>Declaring a National Energy Emergency</i>	
<a href="#">14261</a>	<i>Reinvigorating America's Beautiful Coal</i>	
<a href="#">14315</a>	<i>Ending Market Distortions...</i>	

# Secretarial Orders/ Implementation Memos

Order	Name/Focus	References /Implementing orders
<a href="#"><u>3417</u></a>	<i>Addressing the National Emergency</i>	<a href="#"><u>EO 14156</u></a>
<a href="#"><u>3418</u></a>	<i>Unleashing American Energy</i>	<a href="#"><u>EO 14154</u></a>
<a href="#"><u>3437</u></a>	<i>Ending preferential Treatment for Unreliable...</i>	<a href="#"><u>EO 14315</u></a> , <a href="#"><u>EO 14154</u></a> , <a href="#"><u>SO3418</u></a>
<a href="#"><u>3438</u></a>	<i>Managing Federal Energy Resources.....</i>	<a href="#"><u>EO 14156</u></a> , <a href="#"><u>EO 14315</u></a>
<a href="#"><u>July 15</u></a>	DOI Departmental Review of Wind and Solar	<a href="#"><u>Jan 20 Pres Memo</u></a> , <a href="#"><u>EO 14315</u></a> , <a href="#"><u>EO 14156</u></a> , <a href="#"><u>SO 3417</u></a> , <a href="#"><u>SO 3418</u></a>
<a href="#"><u>July 29</u></a>	DOT memo on Wind Energy	
<a href="#"><u>July 30</u></a>	BOEM Rescinds Designated Wind Areas	<a href="#"><u>Jan 20 Pres Memo</u></a> , <a href="#"><u>SO 3437</u></a>
<a href="#"><u>Aug 4</u></a>	DOI Memo on BGEPA	<a href="#"><u>EO 14315</u></a> , <a href="#"><u>SO 3437</u></a>



# Secretarial Orders/ Implementation Memos

Order	Name/Focus	References /Implementing order
<a href="#">Aug 6</a>	<i>BLM Cancels Lava Ridge</i>	<a href="#">Jan 20 Pres Memo</a>
<a href="#">Aug 7</a>	<i>BOEM Reevaluation of Offshore Wind</i>	<a href="#">Jan 20 Pres Memo</a> , <a href="#">SO 3437</a> , <a href="#">SO 3438</a>
<a href="#">Aug 29</a>	<i>DOT Termination of Grants</i>	<a href="#">Pres Memo April 9</a>
<a href="#">Sept 3</a>	<i>Trump Admin pulls together agencies to look at impacts of wind</i>	

## Project Specific Actions

DOI Stop Work Revolution Wind

DOI Remand and Vacatur of Maryland COP

DOI Remand and Vacatur South Coast Wind COP

DOI Remand and Vacatur of NE 1 and 2 COP