Oregon Department of **ENERGY**

Data Centers and the Oregon Energy Strategy

House Committee on Climate, Energy, and Environment

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Overview of presentation

- Historical tech load growth
- Forecasted growth
- Oregon Energy Strategy recommendations

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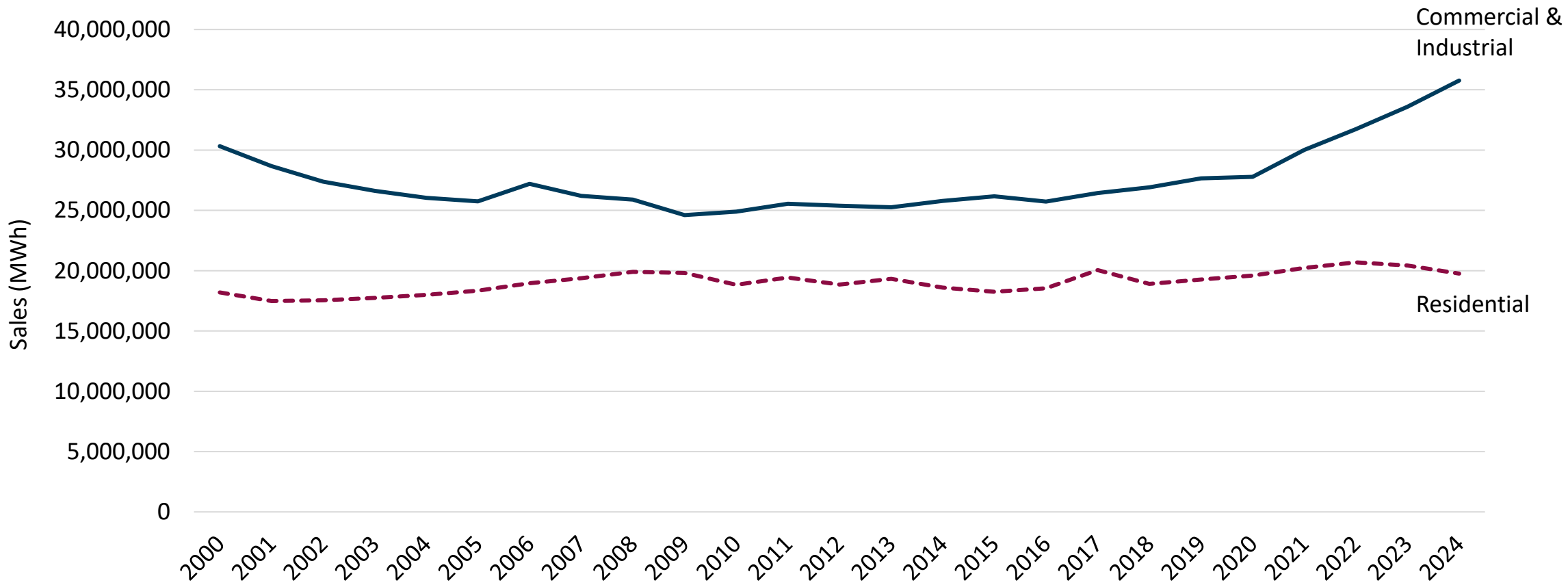
Historical Growth

Residential & Commercial/Industrial Sales 2000-2024



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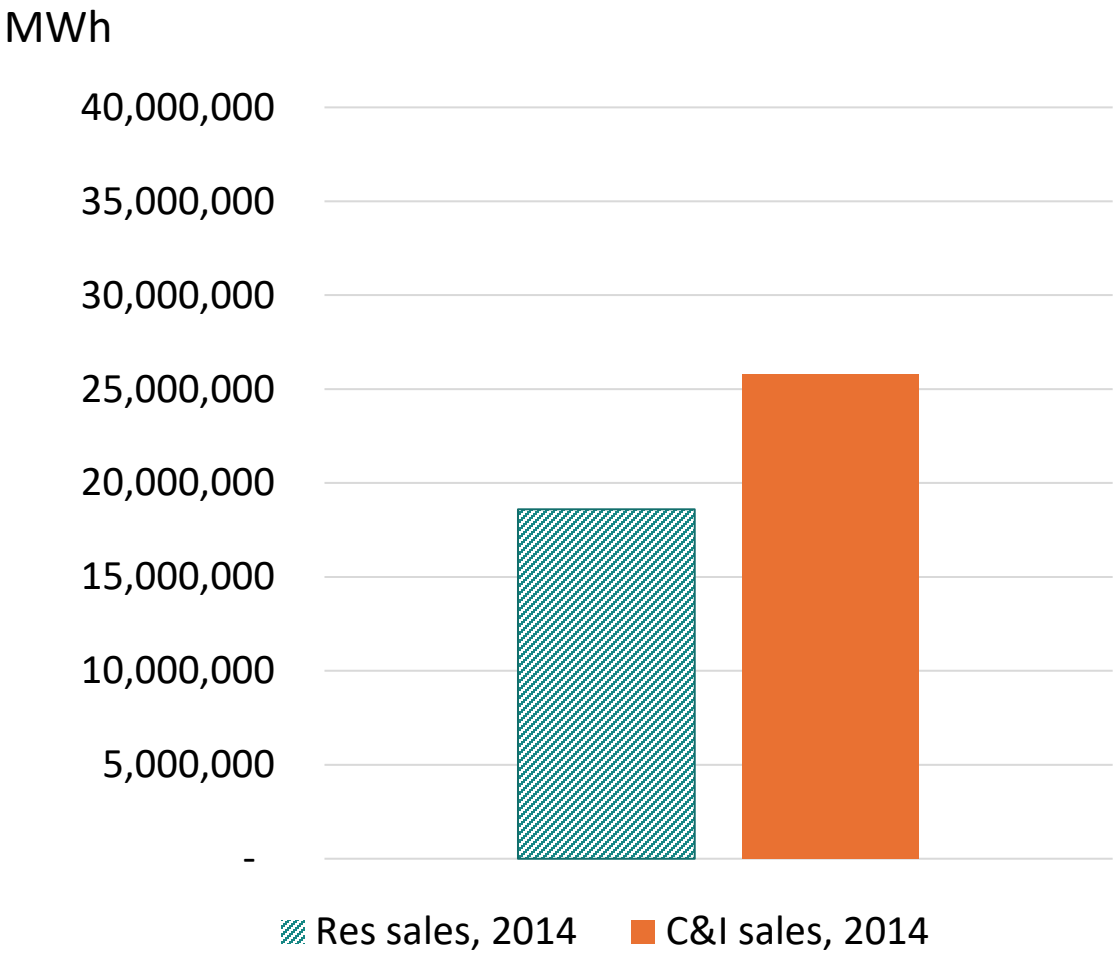
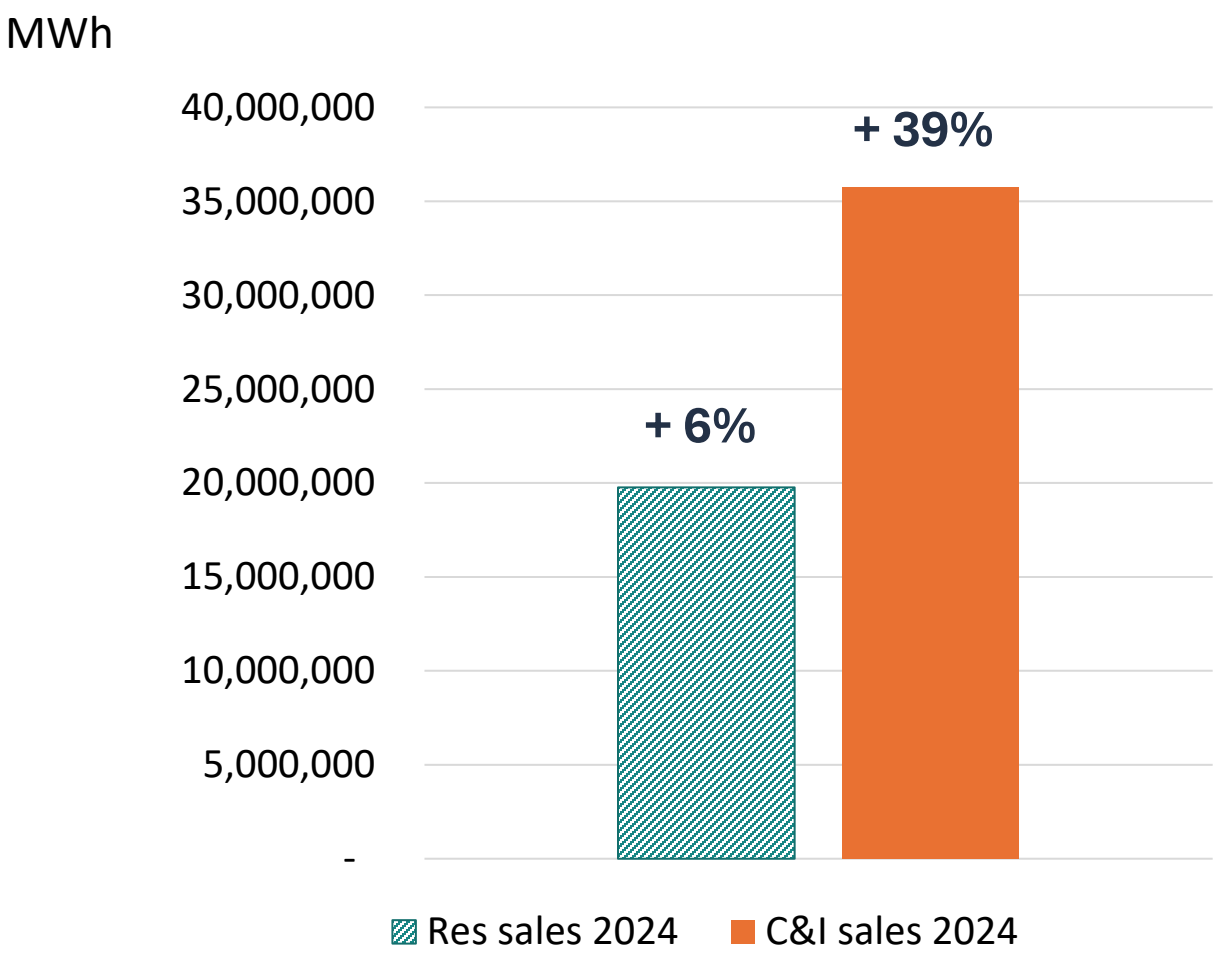
Data from OPUC's annual Oregon Utility Statistics books, all at https://www.oregon.gov/puc/forms/Pages/default.aspx

Growth in Residential vs. Commercial/Industrial Sales 2014 - 2024

2014

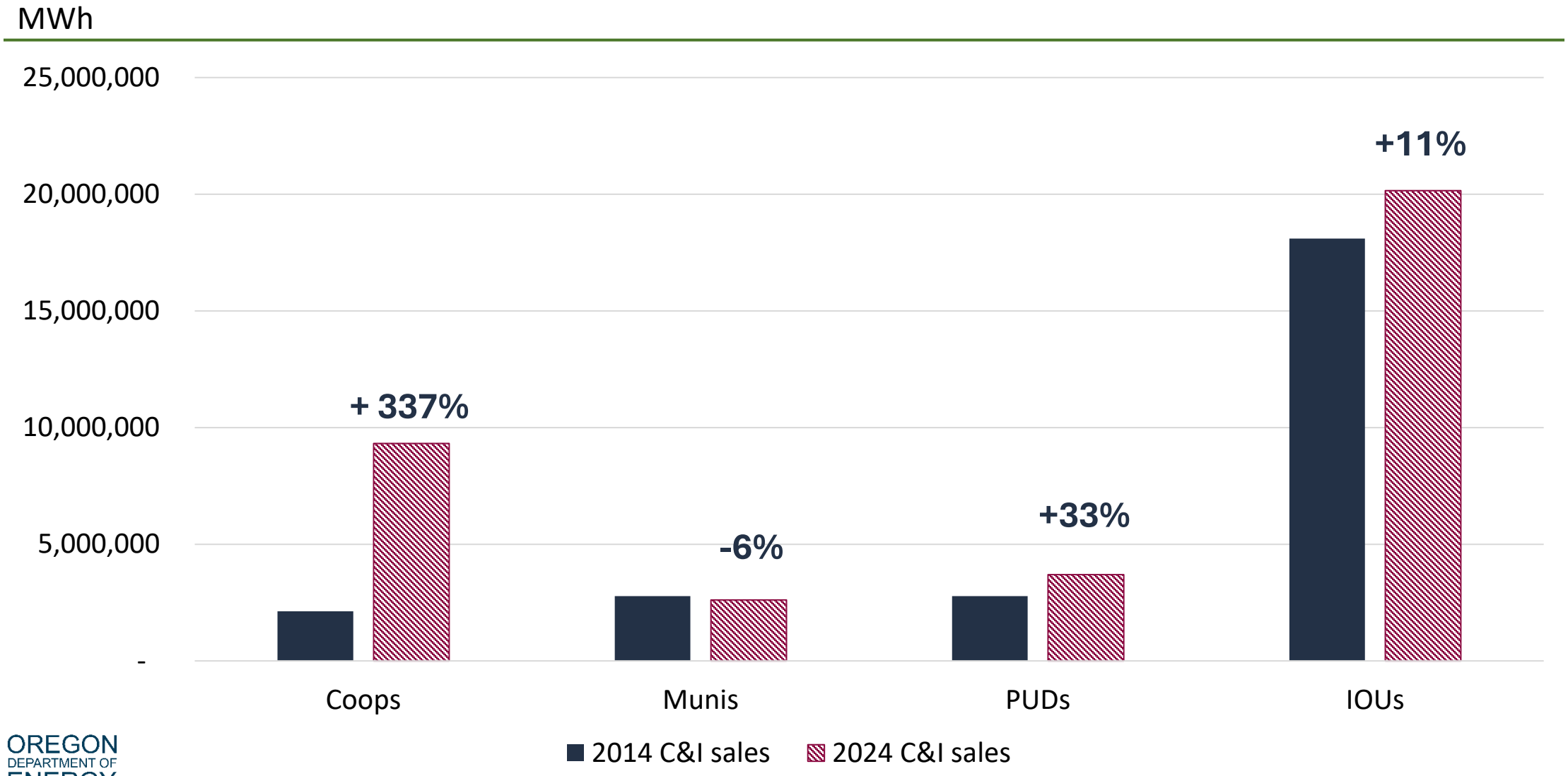


2024



Source: Oregon Utility Statistics Book, 2014 and 2024

Growth in Commercial & Industrial Sales 2014 - 2024



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Forecasted Growth

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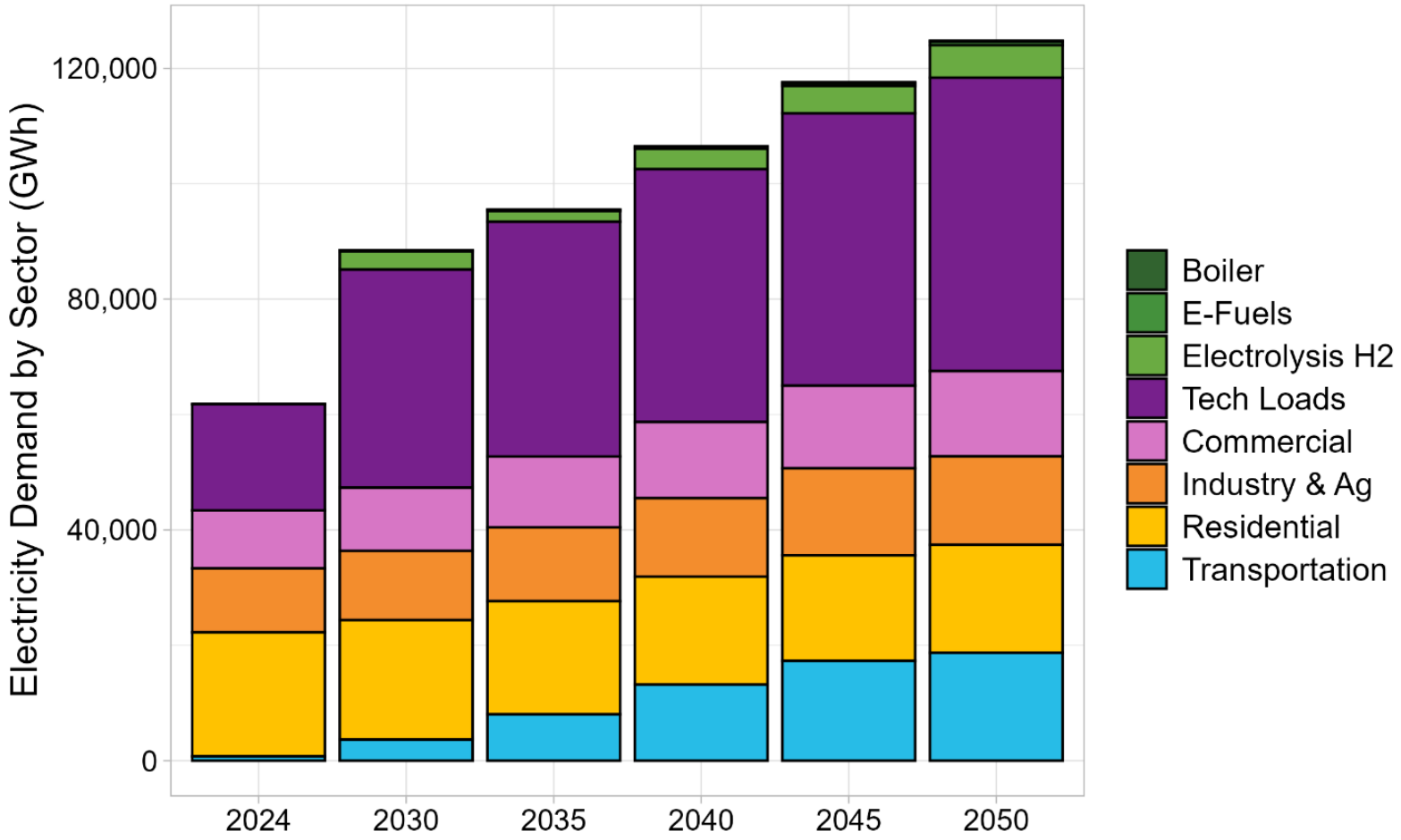
Oregon Energy Strategy Modeling: Tech Loads in Context



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Near-term regional forecast used for the Oregon Energy Strategy

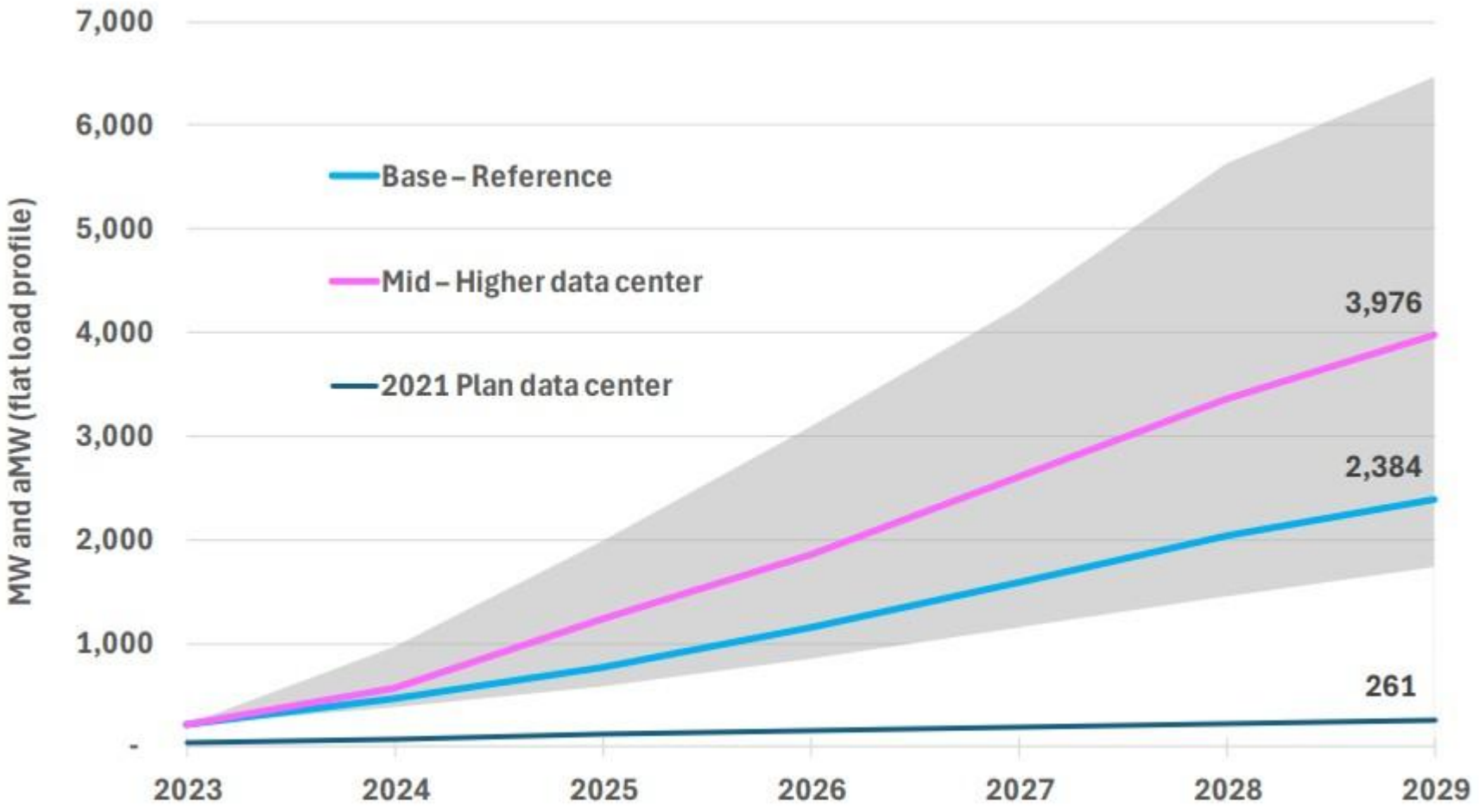


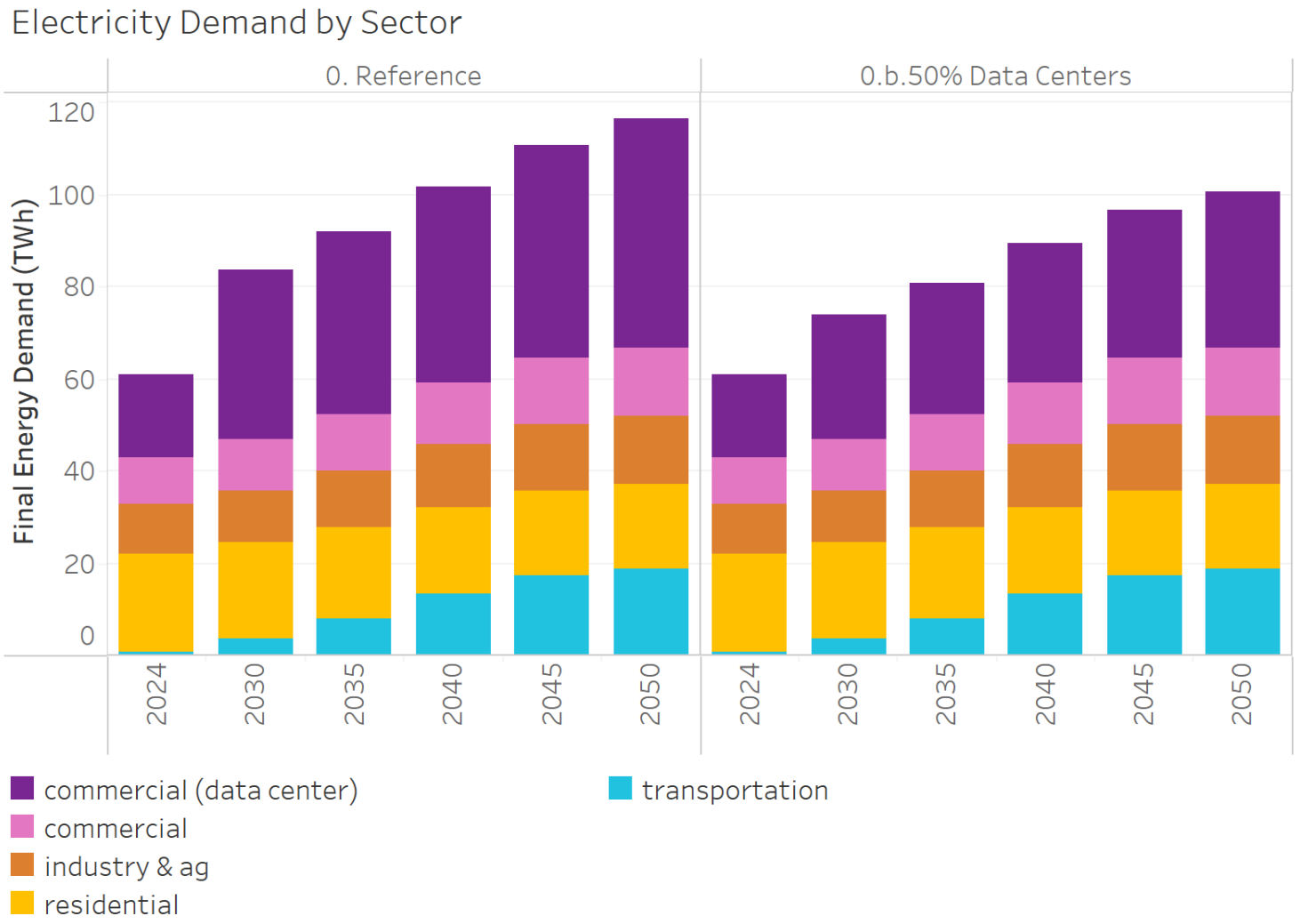
Figure 2. Incremental data center and fab growth forecast, 2023 to 2029

- Applied mid-higher data center forecast
- Informed by public consultation
- Since then, numbers have been revised – still see significant potential near-term growth & uncertainty

Source: Northwest Power & Conservation Council

What if Data Center Growth is 50% Lower?

- Tech load growth is uncertain.
- If 50% lower than Reference Scenario:
  - Electric loads are 11% lower by 2030 and 14% by 2050 compared to the Reference
  - Electricity demand from other sectors still increases overall load by over 25% by 2030



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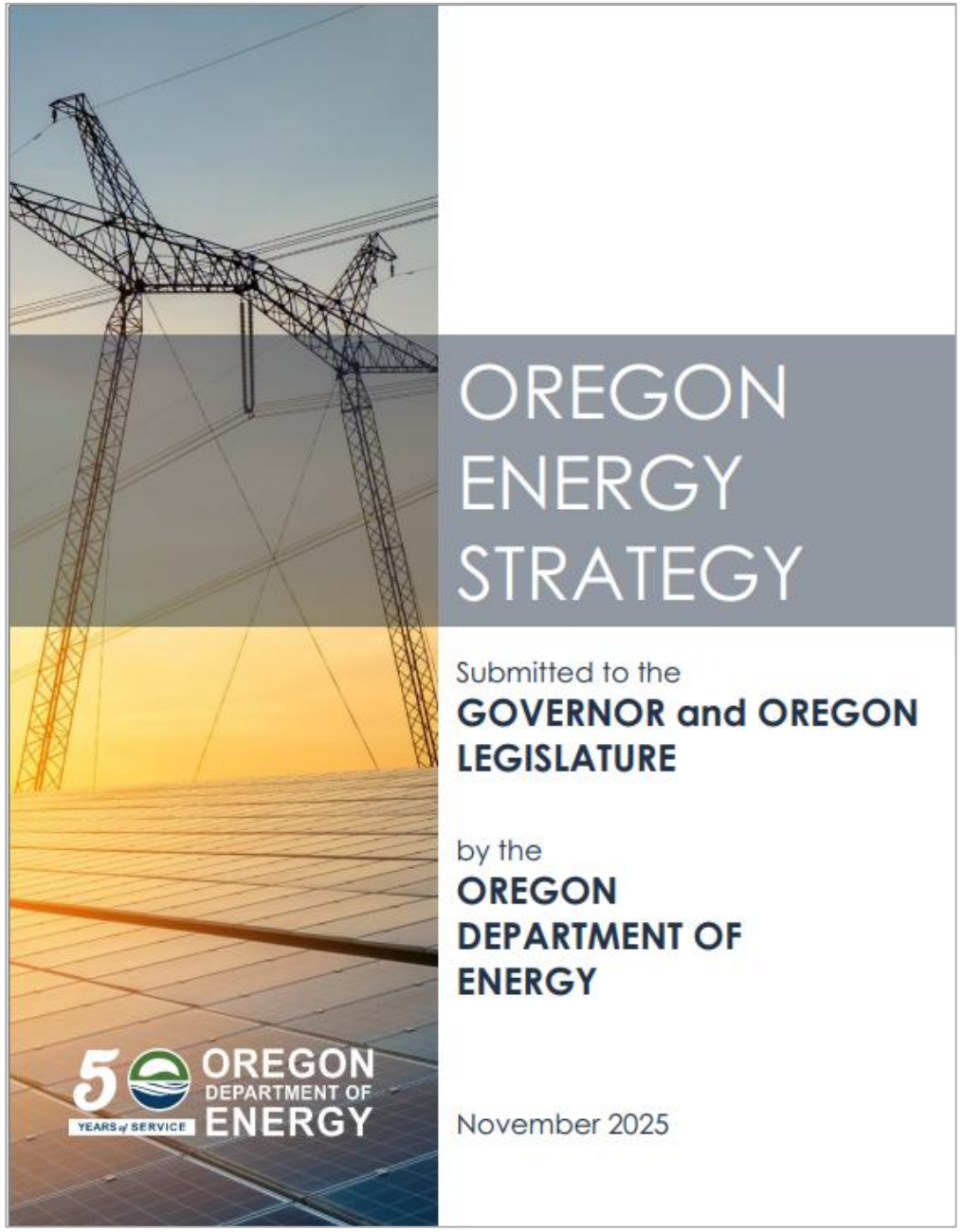
Energy Strategy

Cross-Cutting Action 1

Impose registration and reporting requirements upon all new large electric loads to inform greenhouse gas emissions analyses and evaluate whether policy changes are needed to bring emissions in line with state policies. This would require an action from the Environmental Quality Commission.

SCAN OR CLICK



https://energystrategy.oregon.gov/

Demand-side Flexibility

- We frequently hear concerns about resource adequacy
- Data centers are important to consider in this context
- New study* finds large electric load flexibility can play a big role
- Important considerations: air quality (backup diesel generators at data centers) and how to engage data centers to be flexible

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*Sylvan Energy Analytics, Near-term winter resource adequacy challenges in the Pacific Northwest, a review of E3's Northwest RA Study Phase 1 and independent evaluation of near-term winter challenges.

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Questions?

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