Transmission Solutions: Gotta Love ‘Em?
Transmission Solutions

NARUC
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The MISO resource interconnection queue consists of 490 projects totaling over 80 GW

- **West**: 28.5 GW, 177 requests
- **East (ATC/UP)**: 6.7 GW, 46 requests
- **East (ITC)**: 12.7 GW, 67 requests
- **Central**: 20.5 GW, 108 requests
- **South**: 14.1 GW, 92 requests

### MISO Active Queue by Study Area

#### Fuel Type Legend
- Wind
- Gas
- Solar
- Other
The Eastern Interconnection is experiencing the same phenomenon
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NARUC 130th Annual Meeting

Jodi Moskowitz, Sr. Dir. Trans Strat, Policy & Rates
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November 13, 2018
How can we ensure that transmission planning processes and cost allocation practices are facilitating beneficial development?
Challenges and Needs – Reliability and Resiliency

Challenges and Needs – Aging Infrastructure and 21st Century Planning

Figure 9. Current transmission infrastructure age, relative to useful life

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Transmission Solutions: Potential Cost Savings Offered by Competitive Planning Processes

Discussion Paper

PRESENTED TO

NARUC
National Association of Regulatory Utility Commissioners

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November 13, 2018
U.S. transmission investments have stabilized at approx. **$20 billion/year** in the last five years, after rising steadily from $2 billion/year in 1990s.
STUDY HIGHLIGHTS

Limited Scope of Full ISO/RTO Planning Review (53%) and Competitive Projects (2%)

- 47% of total transmission investments across all ISO/RTO regions are not subject to full ISO/RTO and stakeholder review in regional planning processes.

- Since 2013, fifteen competitively-bid transmission projects account for only 2% of total transmission investments in ISO/RTO regions.

* CAISO full/limited share based on 2013-16 data
STUDY HIGHLIGHTS

Potential Customer Savings from Competitive Transmission Planning Processes ($8 billion)

Cost savings benefit both customer and transmission owners:

- Customers see lower overall costs
- Transmission owners benefit from keeping transmission a more attractive option to in an energy future of low gas prices and declining cost of wind and solar generation, batteries, and DER technologies

Even if long-term savings were only half this 55% difference and if the scope of competition could be expanded from 2% to 33% of total transmission investments, estimated customer benefits would be approximately $8 billion over just five years.
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Session A5

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