

Planned Transmission: Lessons Learned, At Home and Abroad

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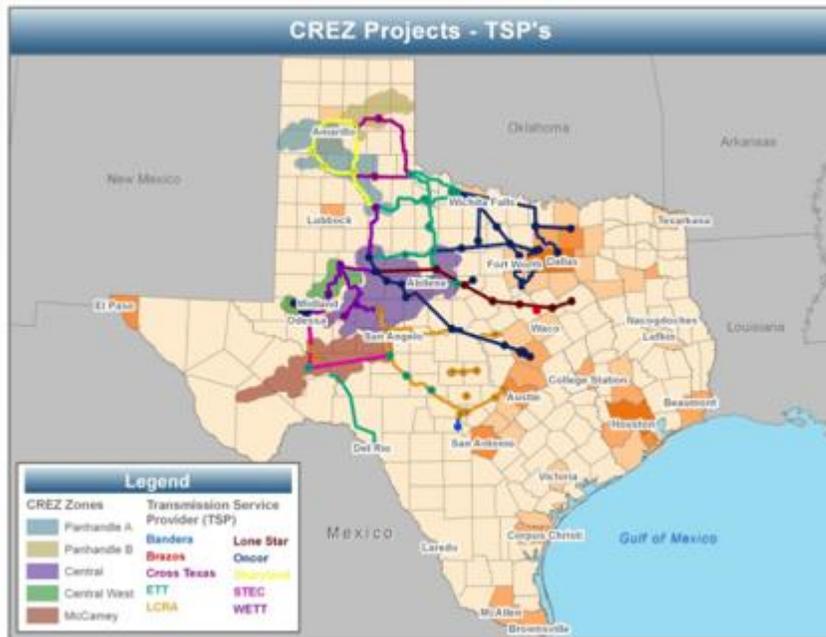


A tale of two states: what works and what doesn't

Texas Model

Planned, open access transmission spurs growth.

In great part because of CREZ, Texas has the highest amount of installed wind capacity in the country (nearly 25 GW), yielding 25,000 jobs, \$46 billion in capital investment and \$307 million each year in landowner payments and state and local taxes.



Maine Model

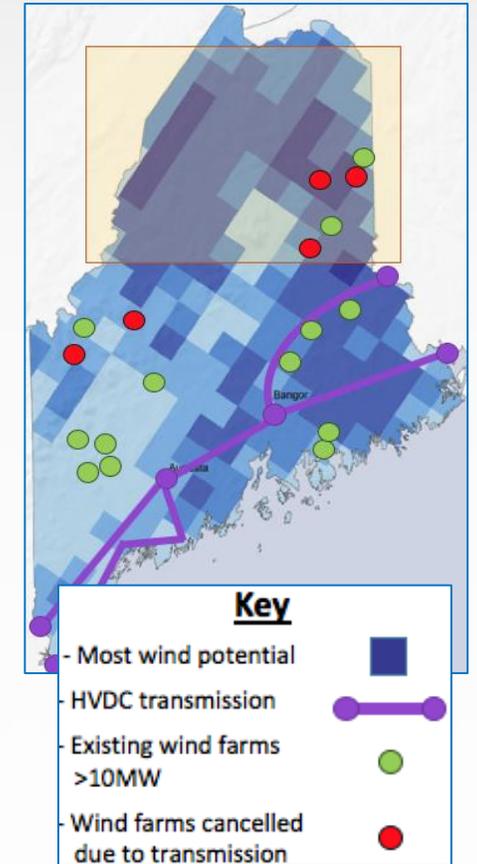
2015 Target: 2000 MW onshore wind

2019 Result: 923 MW (46% of goal)

>At least five major wind farms cancelled due to transmission constraints and interconnection delays.

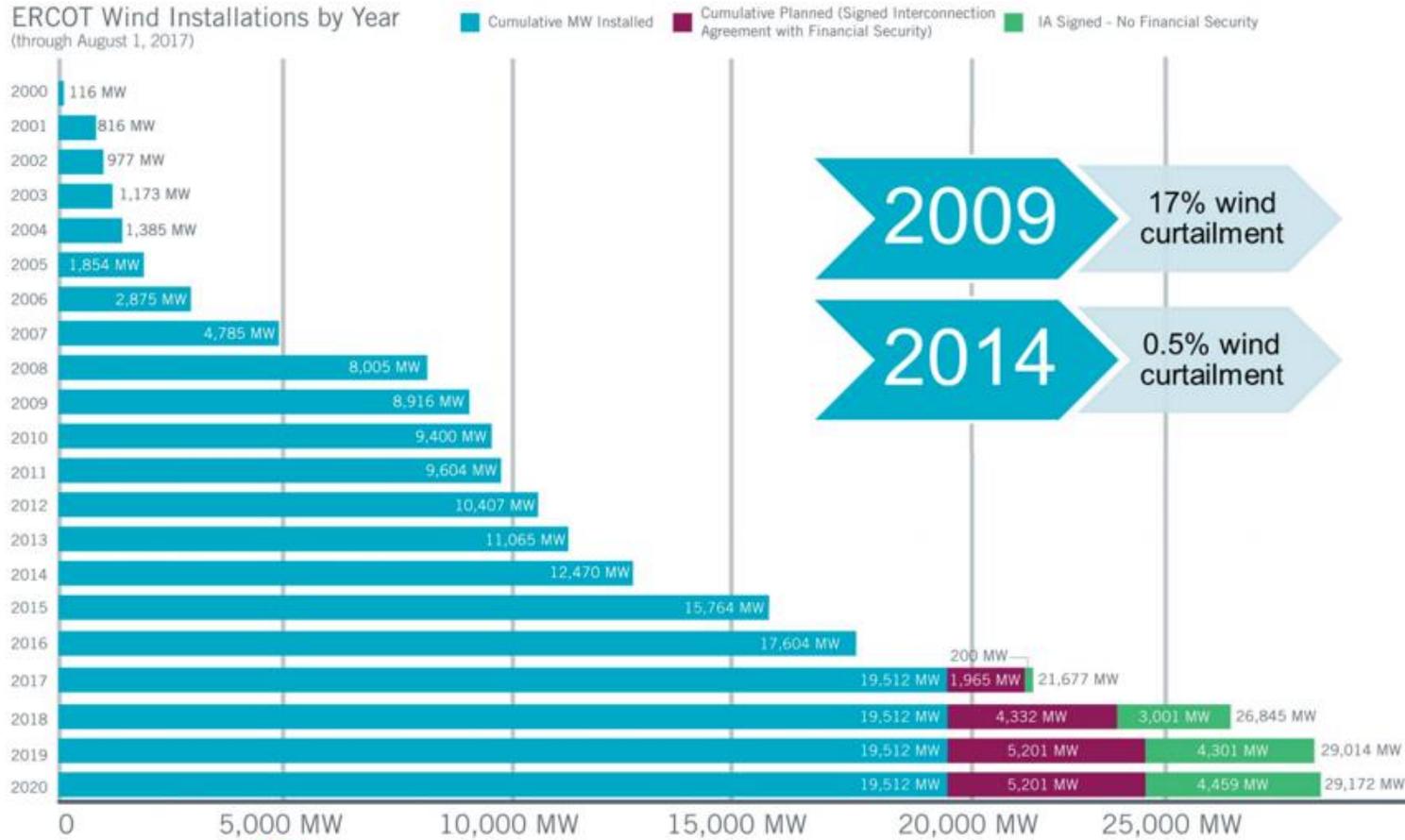
>10-year delay in addressing transmission bottleneck.

>Only 22.8 MW have been built since 2016, few projects are in development, onshore wind industry has been bypassed by offshore wind and Canadian hydro.



Wind Generation Capacity Today

ERCOT Wind Installations by Year
(through August 1, 2017)

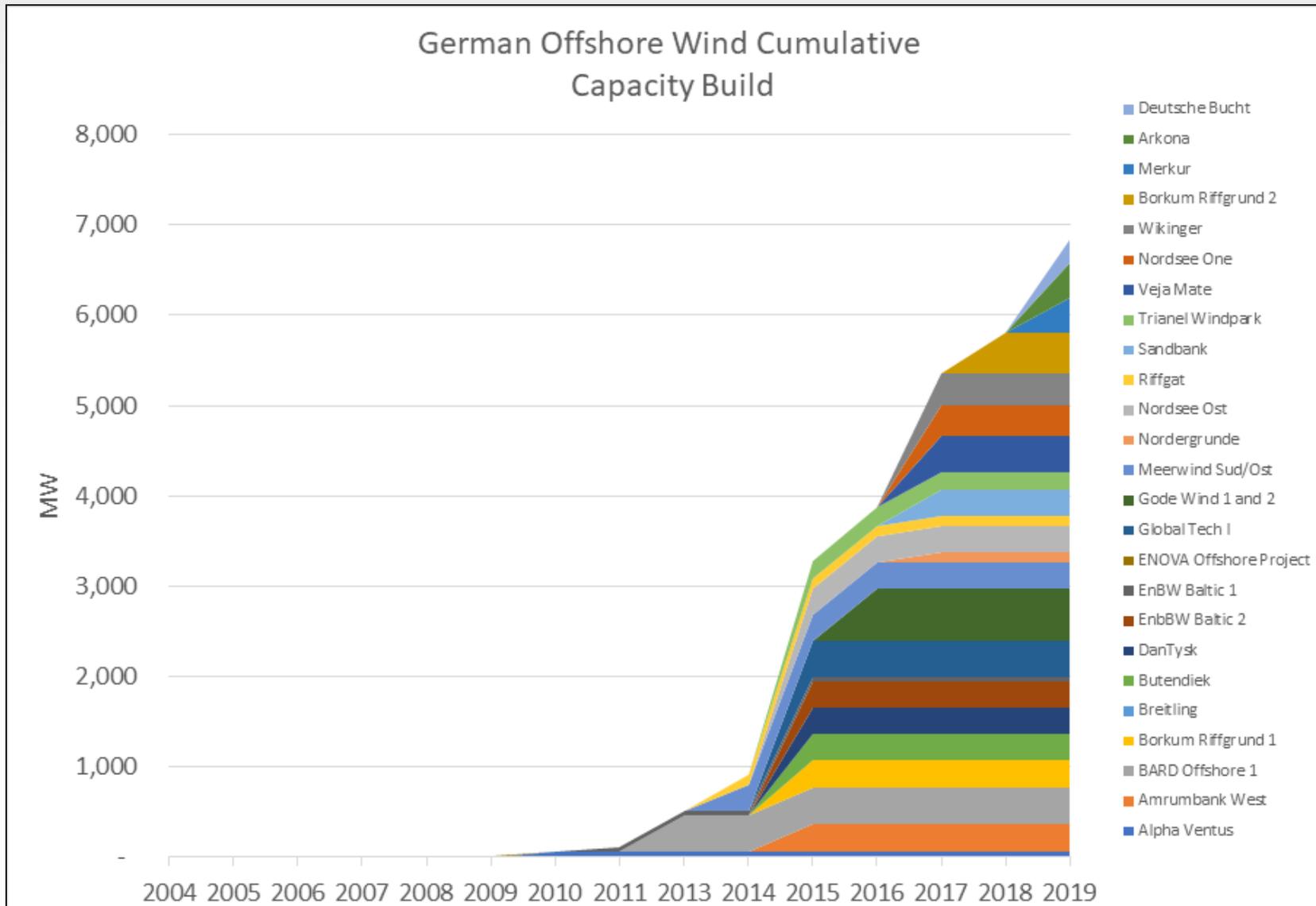


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Source: ERCOT

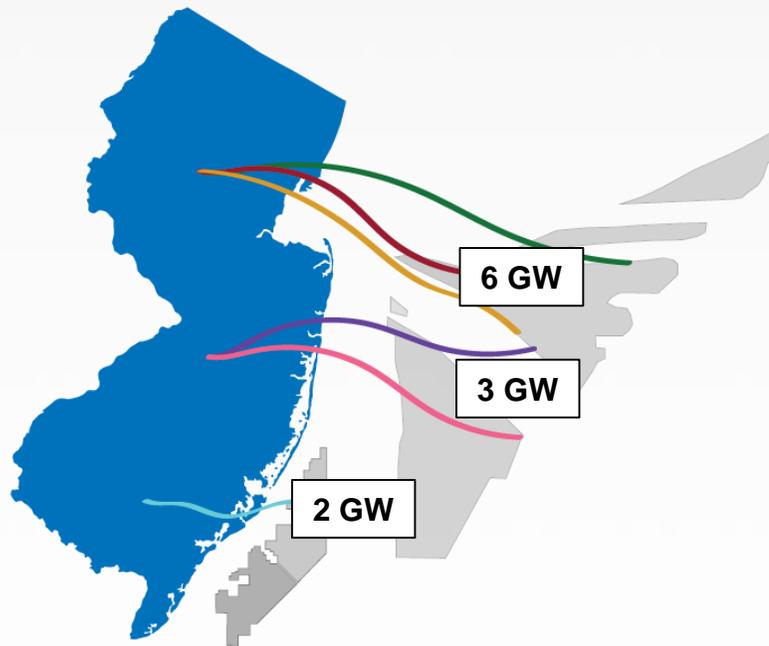
Germany – An evolution in approach to transmission planning



Source: 4C Offshore

A Potential Vision for a Planned Offshore Transmission

Planned



Unplanned

