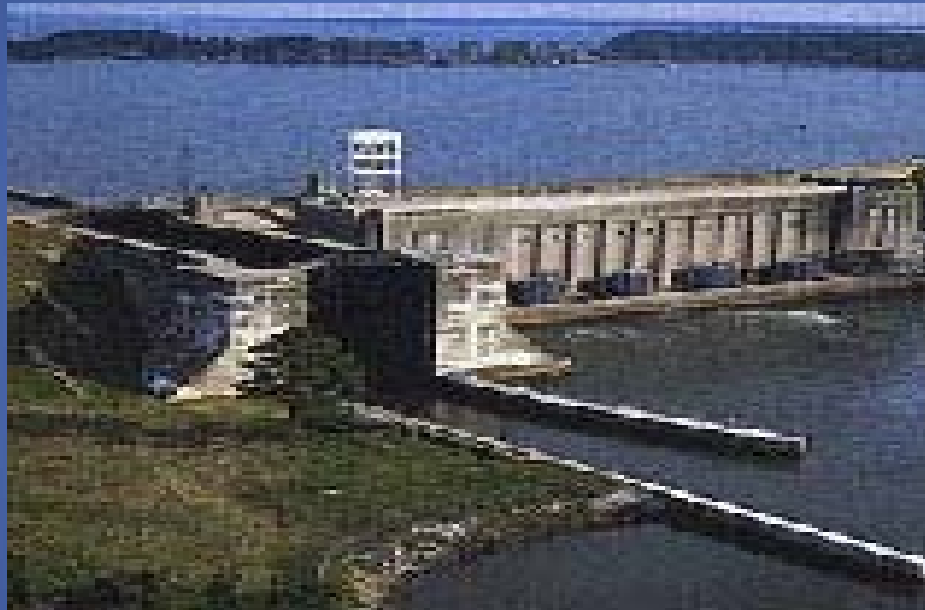


HYDROPOWER: A Comparative Energy Review

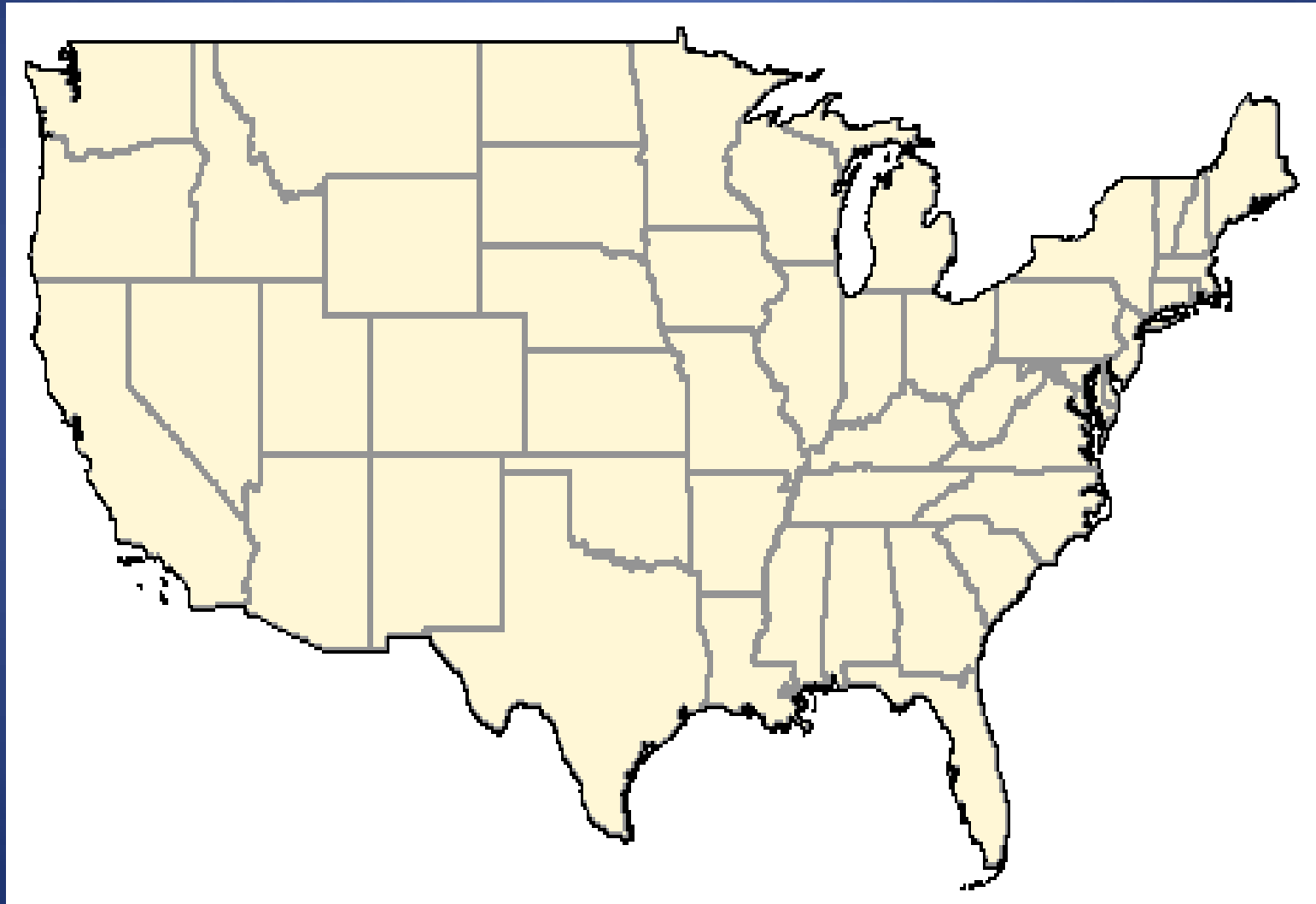


J. Mark Robinson

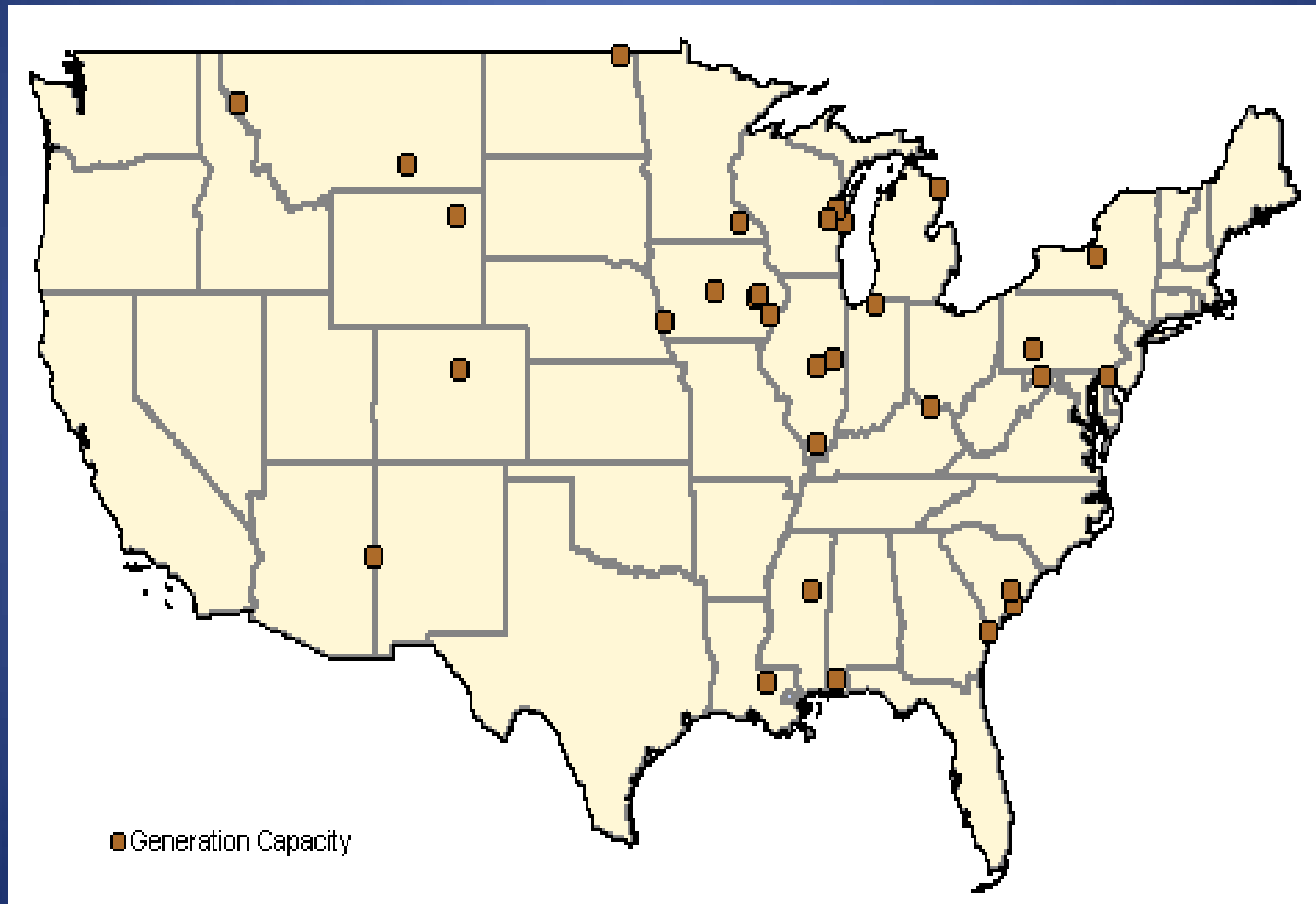
JMR Energy Infra, LLC

NHA April 26, 2010

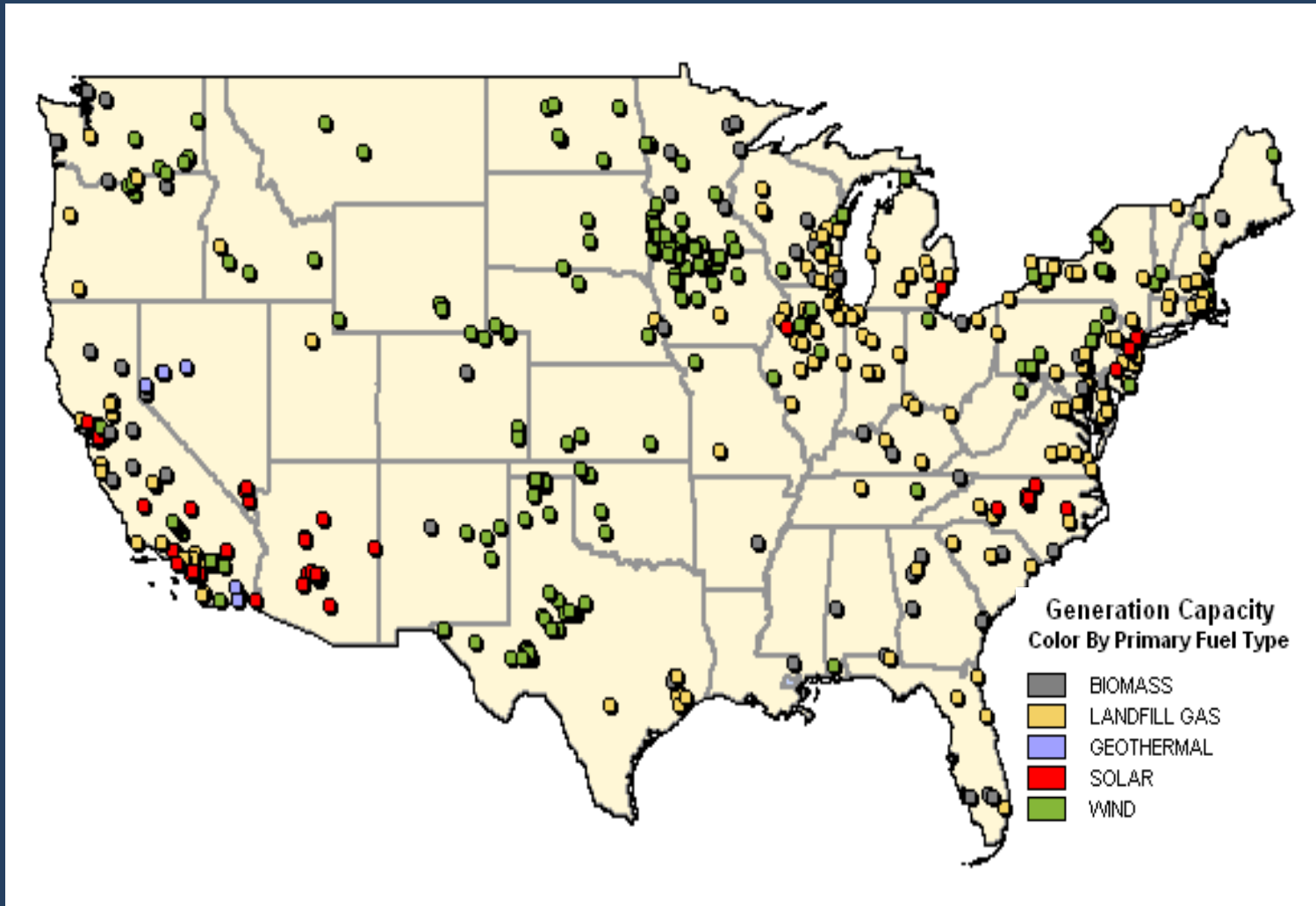
No New Nuclear Generation Sites 1997 - 2008 1,000 Net MW



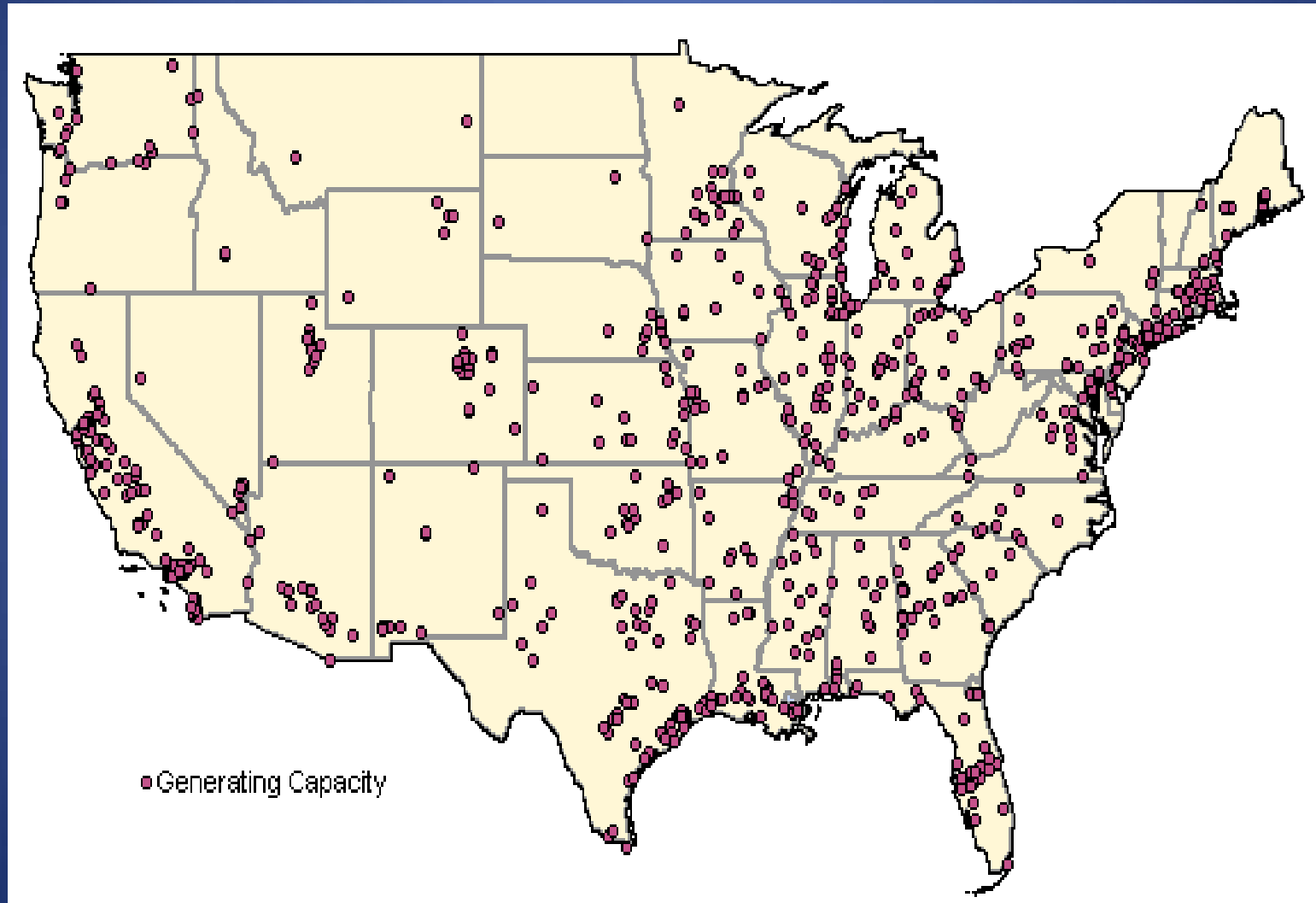
New Coal Fired Generation 1997 – 2008 0 Net MW



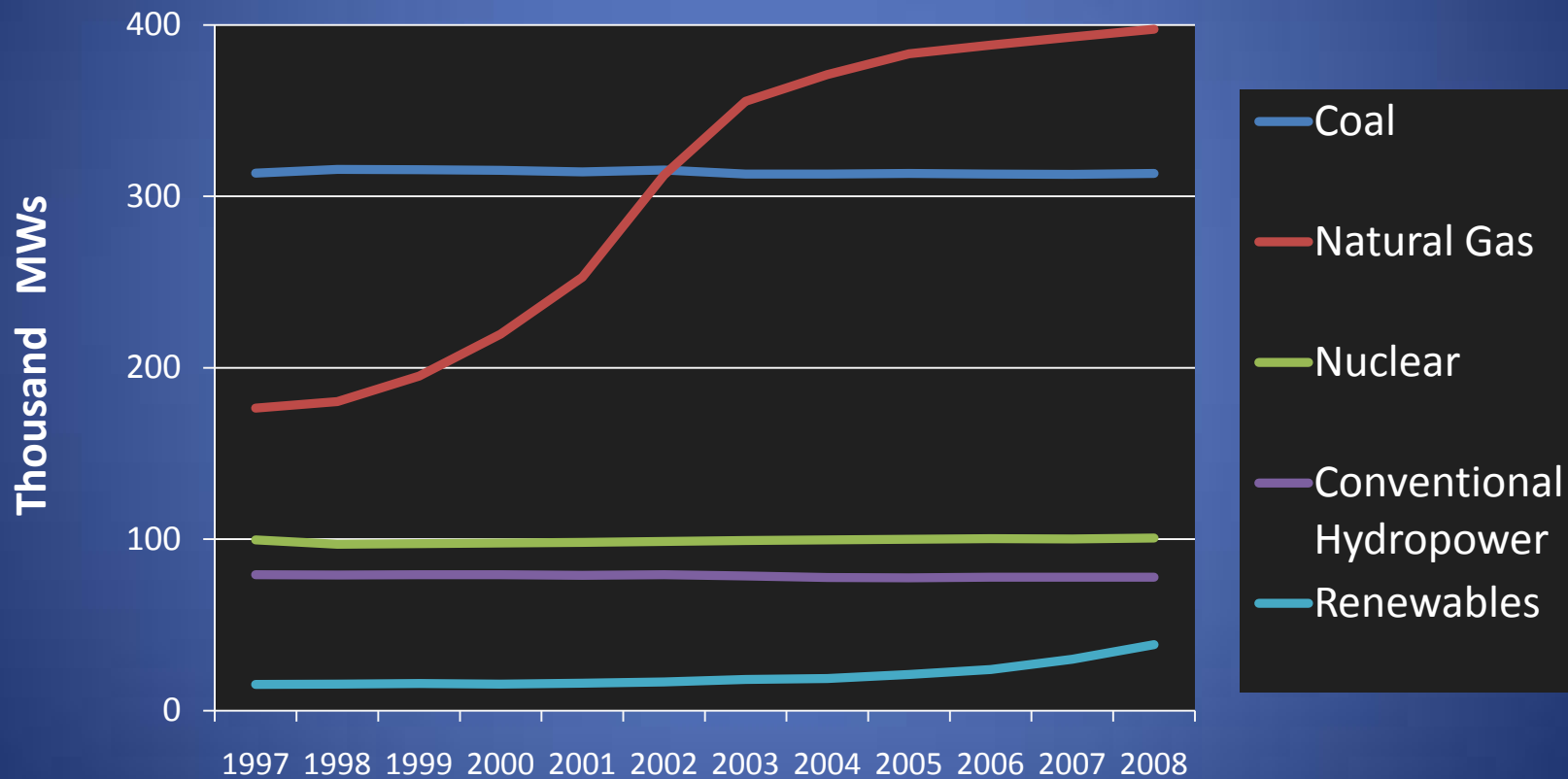
New Non-Hydro Renewable Generation 1997 – 2008 23,000 Net MW



New Natural Gas Fired Generation 1997 – 2008 221,000 Net MW



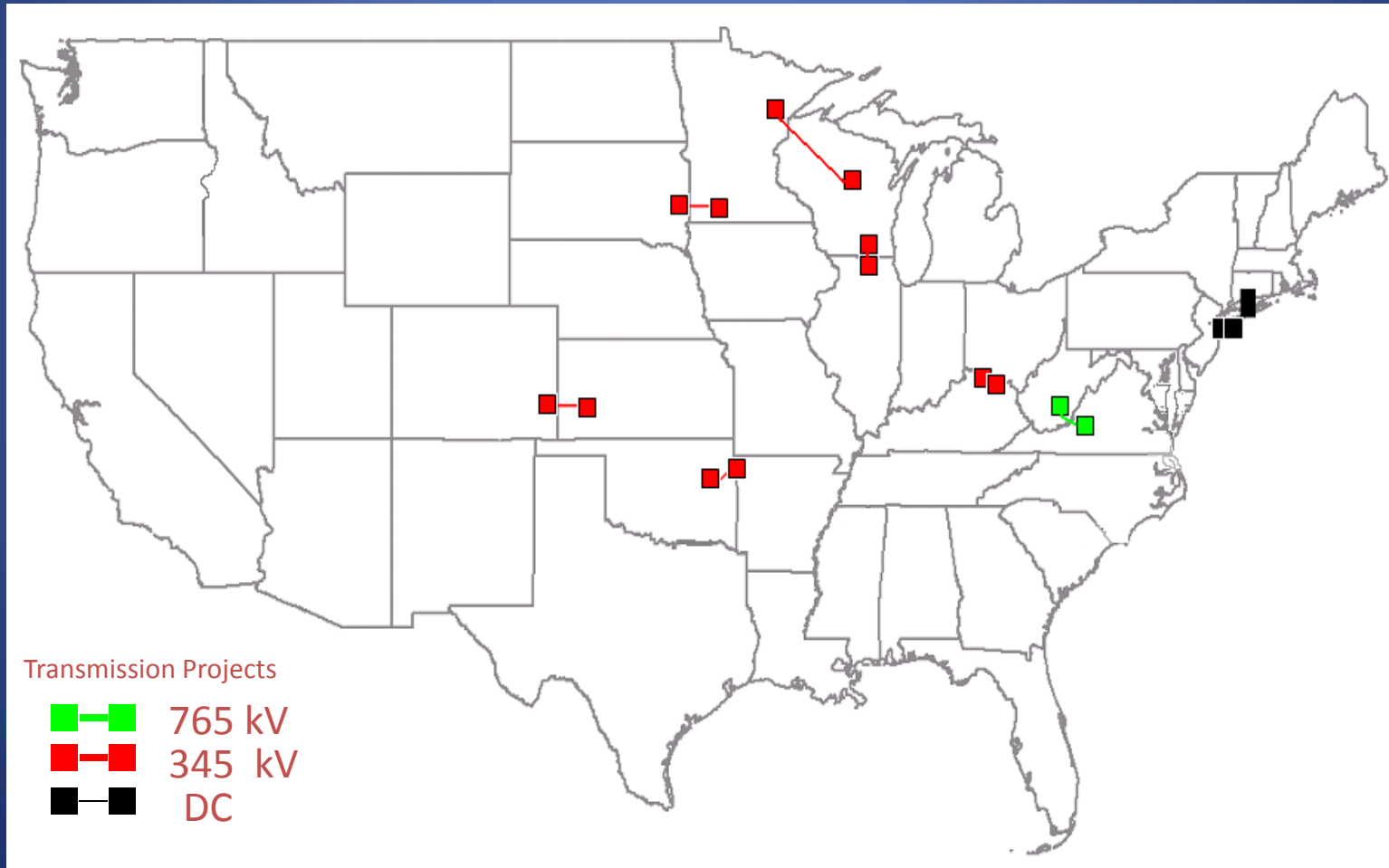
Existing Net Summer Capacity by Energy Source



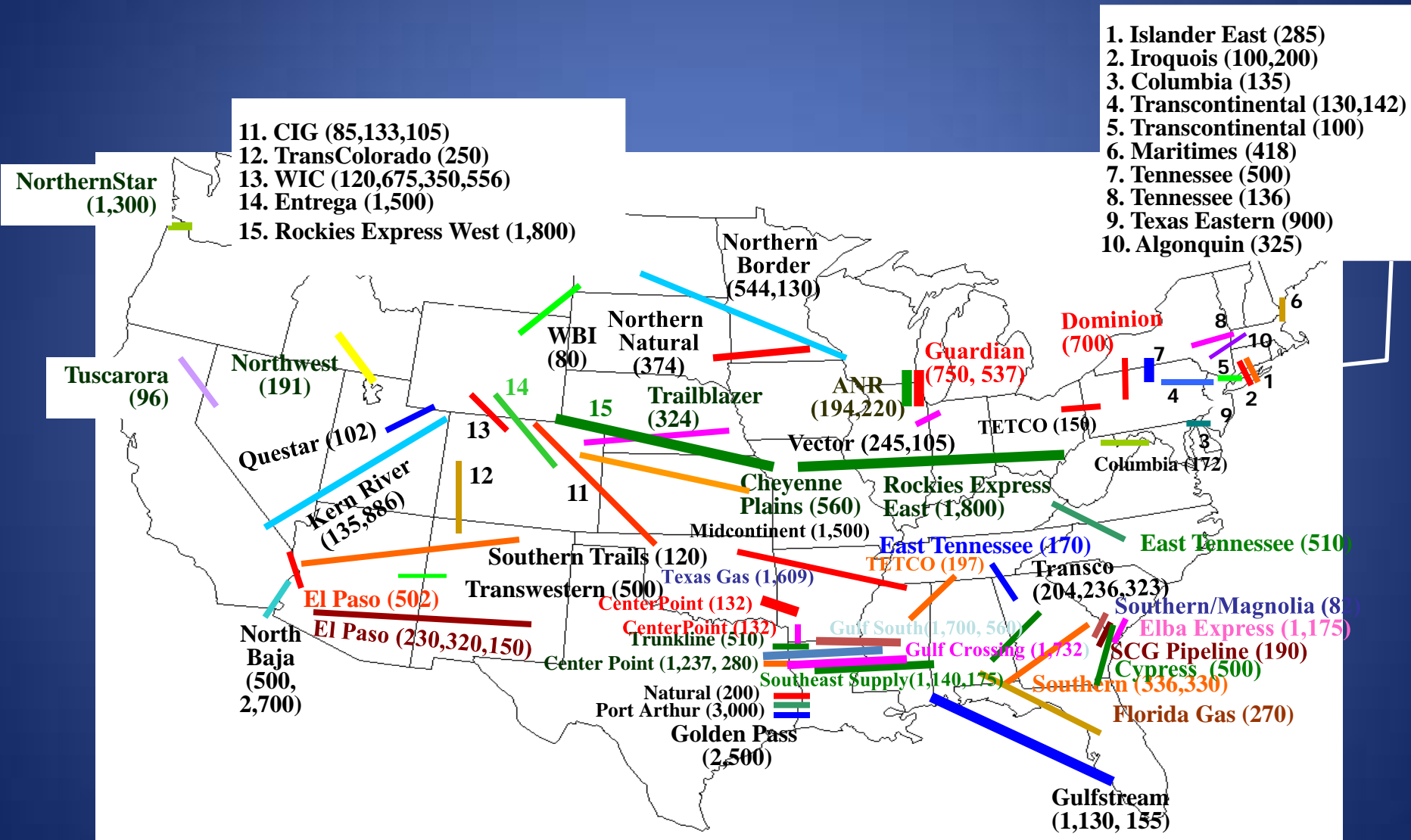
Six Principles of Energy Infrastructure Siting

Six Principles	Hydropower	Renewables/ Transmission	Natural Gas Pipelines
1) Pre-filing	X		X
2) Exclusive Authority			X
3) Disciplined Schedule			X
4) One Federal Record			X
5) Expeditious Judicial Review			X
6) Eminent Domain	X		X

Between 2000 and 2009 nine High Voltage ($\geq 345\text{kV}$) Interstate Transmission Lines have been built 682 miles.



Between 2000 and 2009 the Commission approved 15,000 miles of interstate pipeline



Hydropower Issues

- Competition among renewables
- Legislative/Regulatory Environment
- Development Culture

Hydropower Opportunities

- Firm Capacity – Transmission access
- Low Impact Energy
- Recognition as THE Renewable