Welcome and Introduction
Mark A. Gabriel
Administrator and CEO

Phoenix, Arizona
Meeting Purpose

• Survey status of markets in the West
• Share information
• Preliminary
• Informational
• Continue the discussion
WAPA’s Concerns

• Statutory requirements

• Each region has unique legislation and needs that must be addressed on case-by-case basis.

• Cost
WAPA’s Interest

• WAPA’s significant transmission system
  ▪ More than 17,000 circuit miles
  ▪ 15 states
  ▪ Among top 10 in the country

• Expanding geographic scope of markets

• Expanding number of participants

• Increasingly limited trading partners
Industry Trends: Customer Survey

• Industry driven by:
  ▪ Convergence of technology
  ▪ Rates
  ▪ Customer engagement
  ▪ Regulations

• Key trends:
  ▪ Regulatory burdens / environmental concerns
  ▪ Cyber
  ▪ Coal plant closures
  ▪ Aging infrastructure / Asset Management
  ▪ Transmission reliability
Key Take Away

Each region has unique legislation and needs that must be addressed on case-by-case basis.

Customer engagement is critical.