

FW: BN Ivey - Economic Cost of Generation in Ontario

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From: Imbrogno, Serge (ENERGY)
Sent: Thursday, March 16, 2017 5:41:12 PM (UTC-05:00) Eastern Time (US & Canada)
To: Orsini, Steve (CAB)
Cc: Bromm, William (CAB)
Subject: BN Ivey - Economic Cost of Generation in Ontario

Hi Steve,

Here's our latest comments on the Ivey report. We plan to share with Guy tomorrow and meet with him next week (Tuesday). Of note, we highlight the problem with how the paper position's exports, and we also make the point that conservation programs are funded by the Global Adjustment and therefore should be included in their amortization calculation. This would push the \$1.7 billion into the \$2 billion range.

Let me know if you have any comments.

Serge