Sharing Mechanisms for Utilities in Missouri-Comparable States

(Midwestern and Other Non-Restructured Midwestern States)[1]

State	Major Investor-Owned-Utility	Fuel Adjustment Clause?	Sharing of Fuel Net Fuel & Purchased Power Expense?	Separate Sharing of Off-System Sales Margins?	Historical or Projected Costs?	Historical	Projected	Frequency of Adjustment	Backup documentation	Monthly	Monthly And Historical
AR	Entergy Arkansas Inc	Yes	No	No	Projected		0	1 Annually	http://www.entergy-arkansas.com/content/rates/tariff/fuel_ecr.pdf	0	0
AR	Oklahoma Gas & Electric Co	Yes	No	No	Projected		0	1 Annually	http://www.oge.com/Documents/ARK/Energy%20Cost%20Recovery%20Rider%20Rider%20EFR1.pdf	0	0
AR	Southwestern Electric Power Co (AEP)	Yes	No	Yes, the midpoint OSS margin, which would be fully credited to retail customers, was $583,339 (pre-merger) and $750,600 (post-merger). Both pre- and post-merger, 85% of OSS margin between $750,600 and $1,167,078 was credited to retail customers, and only 50% of OSS margin above $1,167,078 was credited to customers.	Projected		0	1 Actually			
IA	Interstate Power & Light Co	Yes	No	No	Projected		0	1 Monthly	http://www.swenergy.com/Utility/Services/Utility/Rates/Facts/ia/IA1NU015433	0	0
IA	MidAmerican Energy Co	No	No	No	n/a		0	0 n/a	http://www.midamerican.com/media/pdf/rates/rates_main.pdf#page=4	1	0
IN	Duke Energy Indiana	Yes	No	Yes, only 50% of OSS margin above base level is credited to ratepayers during summer months	Projected		0	1 Quarterly	http://www.duke-energy.com/rates/indiana/tariff.asp	0	0
IN	Indiana Michigan Power Co (AEP)	Yes	No	Yes, only 50% of OSS margins above $37.5 million is credited to ratepayers	Projected		0	1 Quarterly	http://www.indianamichiganpower.com/global/utilities/lib/docs/rates/tariff/Indiana/IM-IN-TB-N-01-10.pdf	0	0
IN	Indianapolis Power & Light	Yes	No	No	Projected		0	1 Quarterly	http://www.iplpower.com/Library/PL/website%2011.30.10FAC%20Bill%2011-30-10.pdf	0	0
IN	Northern Indiana Public Service Co	Yes	No	No	Projected		0	1 Quarterly	http://www.nipsco.com/Library/Electric_Tariffs/electric.pdf#page	0	0
IN	Southern Indiana Gas & Electric Co	Yes	No	Yes, only 50% of OSS margins above $10.5 million is credited to ratepayers	Projected		0	1 Quarterly	http://www.sigecorp.com/Library/Electric_Tariffs/electric.pdf#page	0	0
KS	Kansas City Power & Light Co	Yes	No	No	Projected		0	1 Actually, with quarterly updates and true up statements	http://www.kcpl.com/pdfs/KS/Rates/Sched2.pdf	0	0
KS	Kansas Gas & Electric Co	Yes	No	No	Projected		0	1 Quarterly	http://www.westernenergy.com/wcm.nsf/publishedtariffs/E3A4B382C21658880257700006762A8/$file/RECA.pdf	0	0
KS	Westar Energy Inc	Yes	No	No	Projected		0	1 Quarterly	http://www.westernenergy.com/wcm.nsf/publishedtariffs/9C8B8128BC9D6938825770D0067623A/$file/RECA.pdf	0	0
KY	Duke Energy Kentucky	Yes	No	Yes, 34% of Margins > $1 million credited to ratepayers	Historical		1	0 Monthly	http://www.duke-energy.com/pdfs/DE-KY-rider-gas_3.01.10.pdf, http://www.duke-energy.com/pdfs/Sheet_No	1	1
KY	Kentucky Power Co (AEP)	Yes	No	No	Historical		1	0 Monthly	http://www.kentuckypower.com/global/utilities/lib/docs/rates/standards/kentucky/KYTAR12-30-2009.pdf	1	1
KY	Kentucky Utilities Co	Yes	No	No	Historical		1	0 Monthly	http://www.eon-us.com/rec/Ky/ky/electric.pdf	1	1
KY	Louisville Gas & Electric Co	Yes	No	No	Historical		1	0 Monthly	http://www.eon-us.com/rec/ky/louisvelectric.pdf	1	1
MN	Allete Inc	Yes	No	No	Historical		1	0 Monthly	http://www.mnpower.com/regulatory_matters/documents/ratebook_leaves.pdf	1	1
MN	Interstate Power & Light Co	Yes	No	No	Projected		0	1 Monthly	http://www.swenergy.com/Utility/Services/Utility/Rates/Facts/ia/IA1NU015433	1	0
MN	Northern States Power Co (Minnesota)	Yes	No	Yes - 100% of must-based energy sales, and 25% of non-must based energy sales are credited to ratepayers	Projected		0	1 Monthly	http://www.xcelenergy.com/SiteCollectionDocuments/docs/file_Section_5.pdf	1	0
MN	Otter Tail Power Co	Yes	No	No	Historical		1	0 Monthly	http://www.otpco.com/ElectricRates/PDF/MPMN_13.01.pdf	1	1
MO	MGU Resources Group Inc	Yes	No	No	Historical		1	0 Monthly	http://www.montana-dakota.com/RatesTariffs/MDElectric.pdf	1	1
MO	Northern States Power Co (Minnesota)	Yes	No	Yes - 83% of must-based energy sales, and 50% of non-must based energy sales are credited to ratepayers	Historical		1	0 Monthly	http://www.xcelenergy.com/SiteCollectionDocuments/docs/file_Section_05.pdf	1	1
MO	Otter Tail Power Co	Yes	No	Yes, 85% of must-based sales margins credited to ratepayers	Historical		1	0 Monthly	http://www.otpco.com/ElectricRates/PDF/MDNO_13.01.pdf	1	1
OK	Oklahoma Gas & Electric Co	Yes	No	Yes - 50% must-through to ratepayers	Historical		1	0 No more than quarterly	http://www.oge.com/residential-customers/billing-and-payment/Pages/Rates.aspx	0	0
OK	Public Service Co of Oklahoma (AEP)	Yes	No	Yes, 75% of OSS margin credited to ratepayers	Historical		1	0 Varies	http://www.pso.com/global/utilities/lib/docs/rates/standards/Oklahoma/RidersMisc/Schedules10-2010.p	0	0
SD	Black Hills Power Inc	Yes	No	Yes, 85% of proceeds Power Marketing Operating Income credited to ratepayers, not to fall below $2 million per year	Historical		1	0 Annually	http://www.blackhillspower.com/pdf/SDTariff.pdf	0	0
SD	Northern States Power Co (Minnesota)	Yes	No	Yes - 100% of must-based energy sales, and 25% of non-must based energy sales are credited to ratepayers	Historical		1	0 Monthly	http://www.xcelenergy.com/SiteCollectionDocuments/docs/file_Section_5.pdf	1	1
SD	NorthWestern Corp	Yes	No	No	Historical		1	0 Quarterly	http://puc.sd.gov/commission/tariffs/Electric/NOrthwestern/section3.pdf	0	0
TN	Kingsport Power Co (AEP)	Yes	No	No	Historical		1	0 Monthly	http://www.appalachianpower.com/global/utilities/lib/docs/rates/standards/Tennessee/tariff03-10.pdf	1	1
WI	Consolidated Water Power Co	Yes	No	No	Historical		1	0 Monthly	http://prc.wi.gov/pdf/files/tariffs/elc/1930.pdf	1	1
WI	Madison Gas & Electric Co	Yes	No, although there is a threshold to trigger review	No	Projected		0	1 Varies	http://www.legis.state.wi.us/rsb/code/psc/psc116.pdf	0	0
WI	Northern States Power Co (Wisconsin)	Yes	No, although there is a threshold to trigger review	No	Projected		0	1 Varies	http://www.legis.state.wi.us/rsb/code/psc/psc116.pdf	0	0
WI	Superior Water Light & Power Co	Yes	No	No	Historical		1	0 Monthly	http://www.swlp.com/customer_service/rates/doc/swlp_notebook.pdf	1	1
WI	Wisconsin Electric Power Co	Yes	No, although there is a threshold to trigger review	No	Projected		0	1 Varies	http://www.legis.state.wi.us/rsb/code/psc/psc116.pdf	0	0
WI	Wisconsin Power & Light Co	Yes	No, although there is a threshold to trigger review	No	Projected		0	1 Varies	http://www.legis.state.wi.us/rsb/code/psc/psc116.pdf	0	0
WI	Wisconsin Public Service Corp	Yes	No, although there is a threshold to trigger review	No	Projected		0	1 Varies	http://www.legis.state.wi.us/rsb/code/psc/psc116.pdf	0	0
Total	17	16	0	12							
% of Total		97%	0%	32%							

[1]: Sample reflects Major Investor-Owned-Utilities in non-restructured states either bordering Missouri, or within the Midwest (defined as states within Center Bureau of West North Central and East North Central). Major Investor-Owned-Utility defined as a threshold of at least 500 GWh of retail sales in 2006.

Historical Total:	17
Projected Total:	19
Historical and Monthly Total:	13

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