

<b>DOCKETED</b>	
<b>Docket Number:</b>	25-IEPR-05
<b>Project Title:</b>	Load Shift Goal Update
<b>TN #:</b>	264443
<b>Document Title:</b>	California Demand Flexibility Summit and Stakeholder Outreach Results
<b>Description:</b>	Presentation by Tom Flynn at the 6/25 IEPR Workshop
<b>Filer:</b>	Stephanie Bailey
<b>Organization:</b>	California Energy Commission
<b>Submitter Role:</b>	Commission Staff
<b>Submission Date:</b>	6/24/2025 3:26:06 PM
<b>Docketed Date:</b>	6/24/2025



# California Energy Commission

Title: California Demand Flexibility Summit and Stakeholder Outreach Results

Presenter: Tom Flynn

Date: June 25, 2025

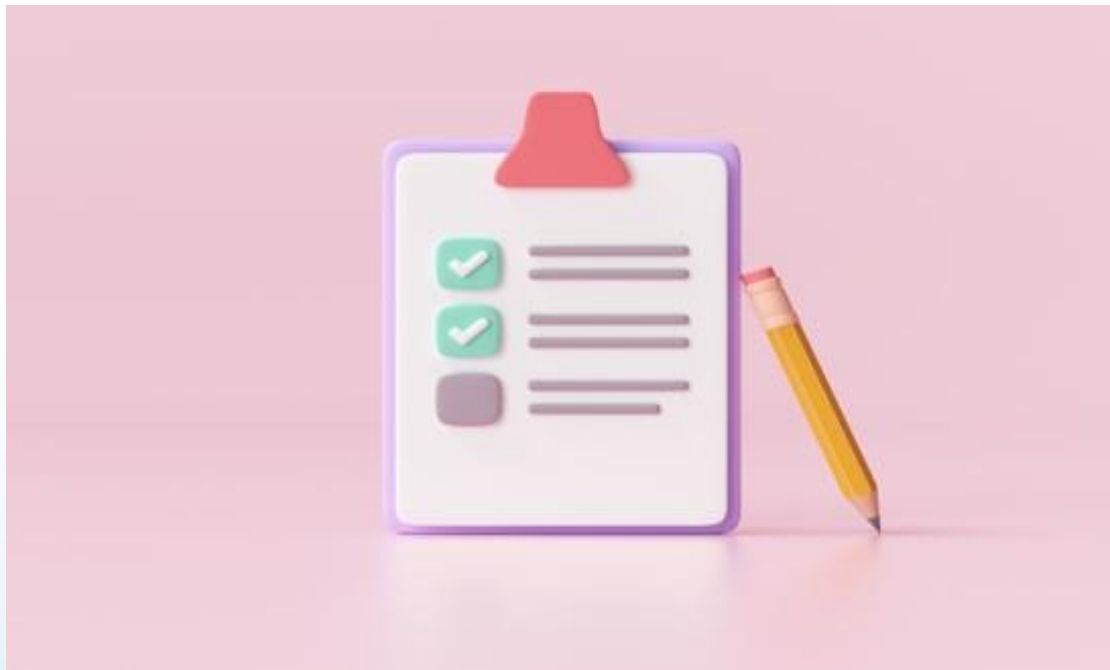


# Stakeholder Input

Critical for understanding:

- Barriers to achieving California's load shift goal of 7 GW by 2030
- Solutions and strategies

## CEC Stakeholder Survey



## Demand Flexibility Summit







# CEC Stakeholder Survey

**Purpose:** Get stakeholder input on barriers, solutions and strategies to achieving California's load shift goal of 7 GW by 2030.

## Stakeholder Process

- Surveyed 39 stakeholders
  - Aggregators, technology providers
  - LSEs, utilities
  - Consultants, research groups
  - Industry associations, consumer advocacy groups
- Received 27 responses

## Survey Topics

1. Policy barriers impacting the full utilization of load flexibility
2. Alternative market or regulatory models and approaches
3. Emerging trends in California's market
4. Other conceptual ideas to scale load flexibility



# Demand Flexibility Summit

## Objective:

Discuss the progress & challenges to achieving California's load shift goal of 7 GW by 2030

## Participation:

- Policy makers (Legislators and State agency representatives)
- Broad spectrum of stakeholders

<https://energy.ucdavis.edu/2025-california-demand-flexibility-summit/>

## Topics:

- Fireside: Unlocking CA's demand flexibility potential
- Keynote: Powering the future
- Plenary 1: Existing programs & incentives
- Plenary 2: Demand-side load flexibility
- Plenary 3: Scaling demand flex
- Plenary 4: Adopting demand flex innovations



# Stakeholder Insights: Market Barriers



1. Frequent program changes result in market uncertainty
2. Program requirements can limit flexibility (e.g., dispatch duration, baselines, dual participation, DER exports, telemetry)
3. Lack of standards (e.g., communications, interoperability issues)





# Market Barriers (continued)

4. Data access
5. Costly interconnection process for V2X
6. Ensuring affordability, equity, and seamless customer engagement





# Stakeholder Insights: Solutions & Strategies

---



1. Streamlined and modernized wholesale market process, including 3<sup>rd</sup> party DR
2. California load-shift goal roadmap
3. Centralized data repository





# Solutions & Strategies (cont.)

4. Unified and simplified utility programs
5. Promote distribution-optimized load flexibility
6. Simplify and incentivize V2X interconnection





# Stakeholder insights: Models outside California



- New York State Public Service Commission’s “Value Stack” framework for compensating DERs
- Texas’ “Smart Meter Texas” framework for an independent statewide data access platform
- Massachusetts’ ConnectedSolutions provides a single umbrella brand across DER classes with end-to-end marketing from the IOU down to the DER provider.



# Summary Observation

Demand flexibility must be

- ✓ Reliable
- ✓ Predictable, and
- ✓ Integrated into the core of our energy planning and operations





# Thank You!