

DOCKETED

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2025 IEPR: Preliminary Data Center Forecast

November 13, 2025



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Methodology

Methodological framework is similar to 2024 IEPR:

1. Request application data from utilities
2. Apply assumptions to account for:
 - Utilization Factor (67%)*: Requested capacity vs max demand
 - Confidence Level: Probability of project completion
 - Ramping: Years to reach full capacity
3. Use existing AMI data to create 8,760 load factor profile

*Unchanged from CEDU 2024



Data Request Process

- Data request sent to:
 - PG&E, SCE, SVP, Palo Alto, VEA
- Additional conversations held with:
 - SDG&E, Burbank, San Jose
- Next steps:
 - In Nov-Dec, CEC will check if the data center application queue has changed significantly before finalizing the forecast for proposed adoption in January
 - In Q1 2026, CEC will request information to disaggregate data center load impacts to busbar to support the CAISO's transmission planning



Treatment of VEA data centers

- VEA load growth is in Nevada
- Will *not* be included in the statewide annual electricity load
- Will be included in:
 - CAISO hourly load
 - LSE/BA tables



Group Definition Change

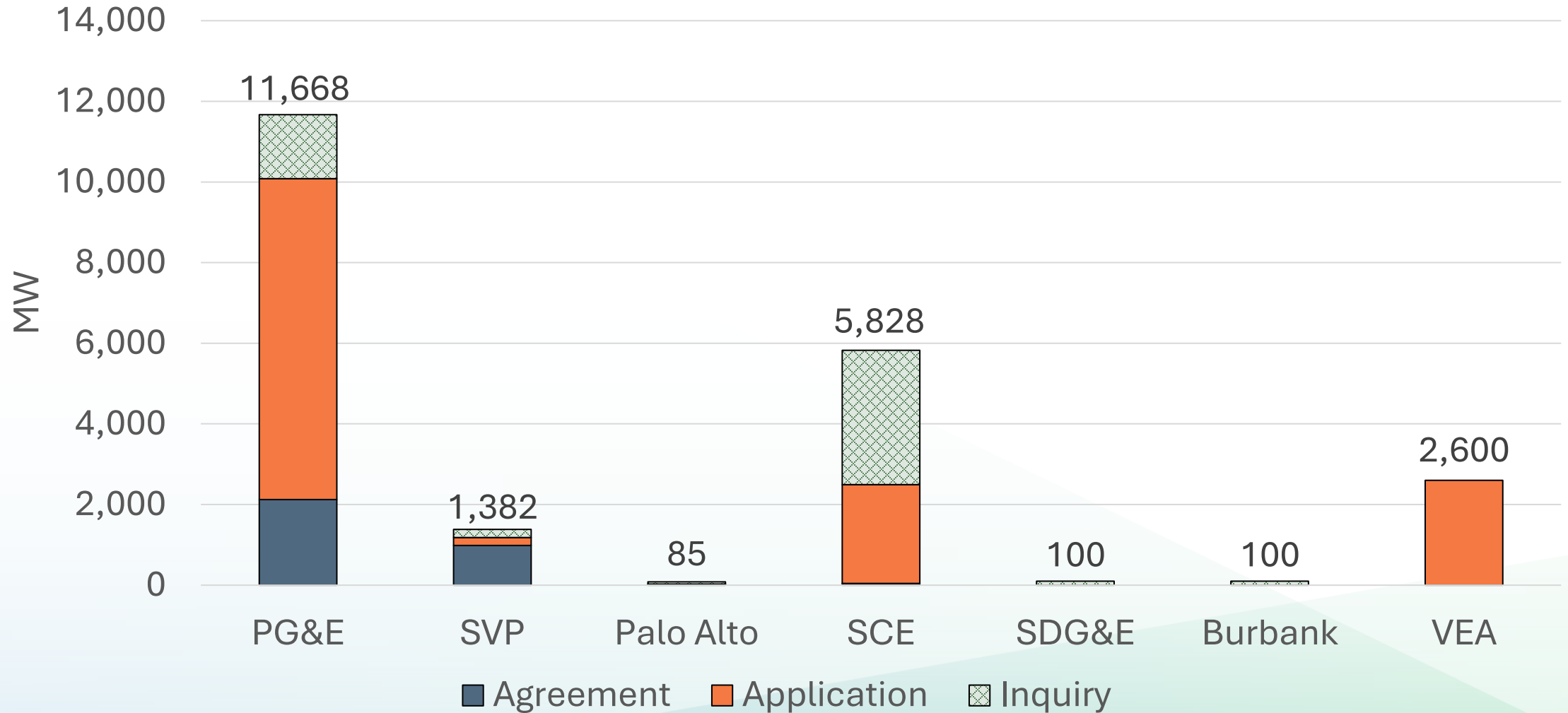
	2024 IEPR	Draft 2025 IEPR
Group 1	Active applications with <u>completed or to-be completed</u> engineering studies	<u>Signed agreement</u> for electric service
Group 2	Active applications <u>prior to initiating</u> engineering studies	<u>Active application</u> for electric service
Group 3	Inquiries	Inquiries

Source: CEC

- 2025 Group 1 projects have more certainty than the 2024 Group 1 projects, since they signed an agreement with the utility
- 2025 Group 2 definition combines what was defined as Group 1 and Group 2 in 2024



2025 Capacity Requested

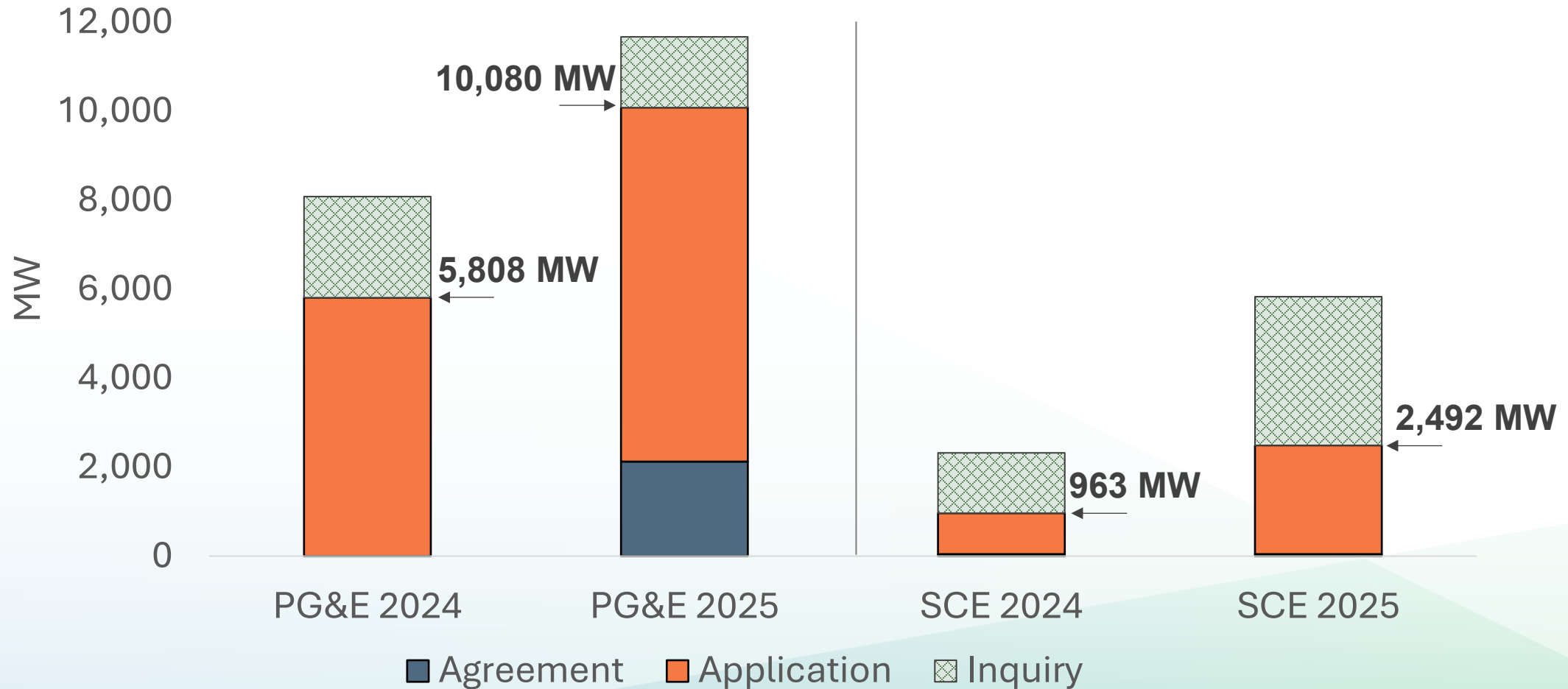


Source: CEC with data from each utility



PG&E and SCE Capacity Requests: 2024 and 2025

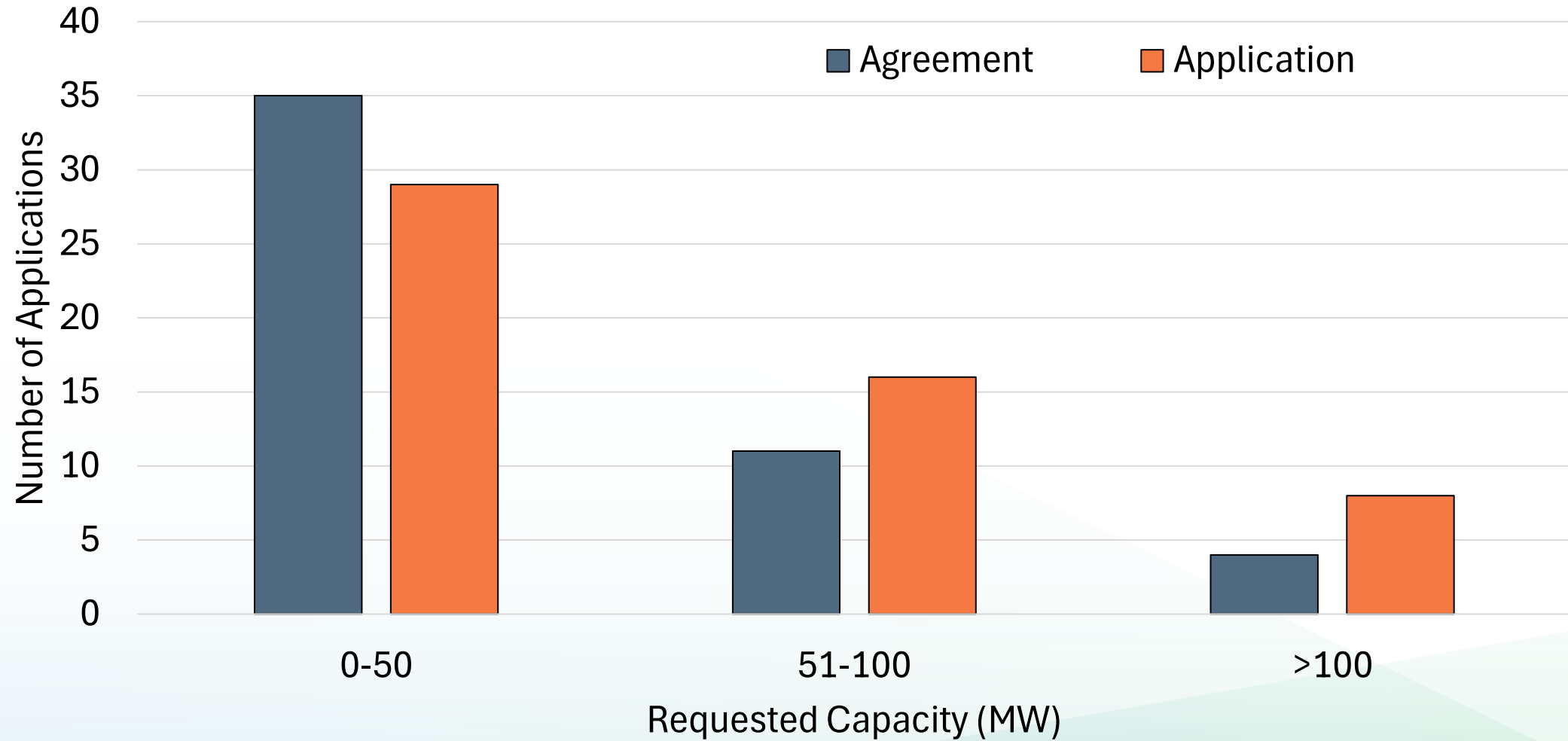
December 2024 compared to summer 2025 data



Source: CEC with data from PG&E and SCE



Data Center Sizes



Source: CEC with data from utilities



Proposed Confidence Levels

2024 IEPR

PG&E	Low	Mid	High
Group 1	50%	70%	70%
Group 2	-	-	50%
Group 3	-	-	10%

SCE	Low	Mid	High
T&D planning	100%	100%	100%
Group 1	50%	70%	70%
Group 2	-	50%	50%
Group 3	-	-	10% - 50% per SCE

Source: CEC with data inputs from PG&E and SCE

2025 IEPR

Assumptions match what was used for PG&E last year, except the red values

All (except SVP)	Low	Mid	High
Group 1	50%	70%	100%
Group 2	-	33%	50%
Group 3	-	-	10%

Source: CEC

Mid: Baseline & Planning Scenario
High: Local Reliability Scenario



Ramping Assumptions

	2024 IEPR	Draft 2025 IEPR
Ramping	Year 0-5: 149% Year 6+: 113%	Linear ramp over 7 years

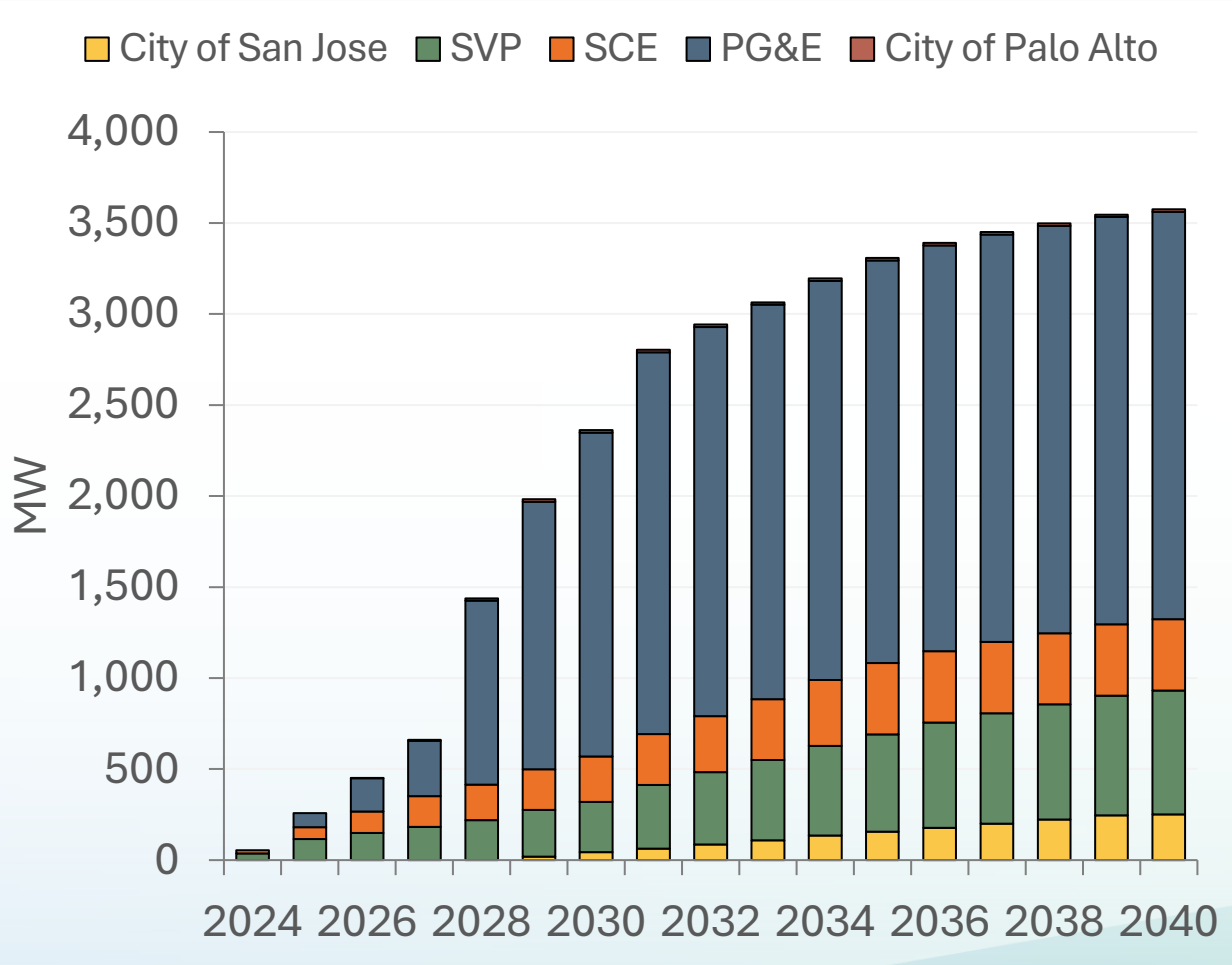
Source: CEC with data from SVP

- Ramping applied to:
 - Projects without ramping information
 - Projects with unrealistically large first year capacity
- Group 2 and 3 project schedules shifted to 2028+

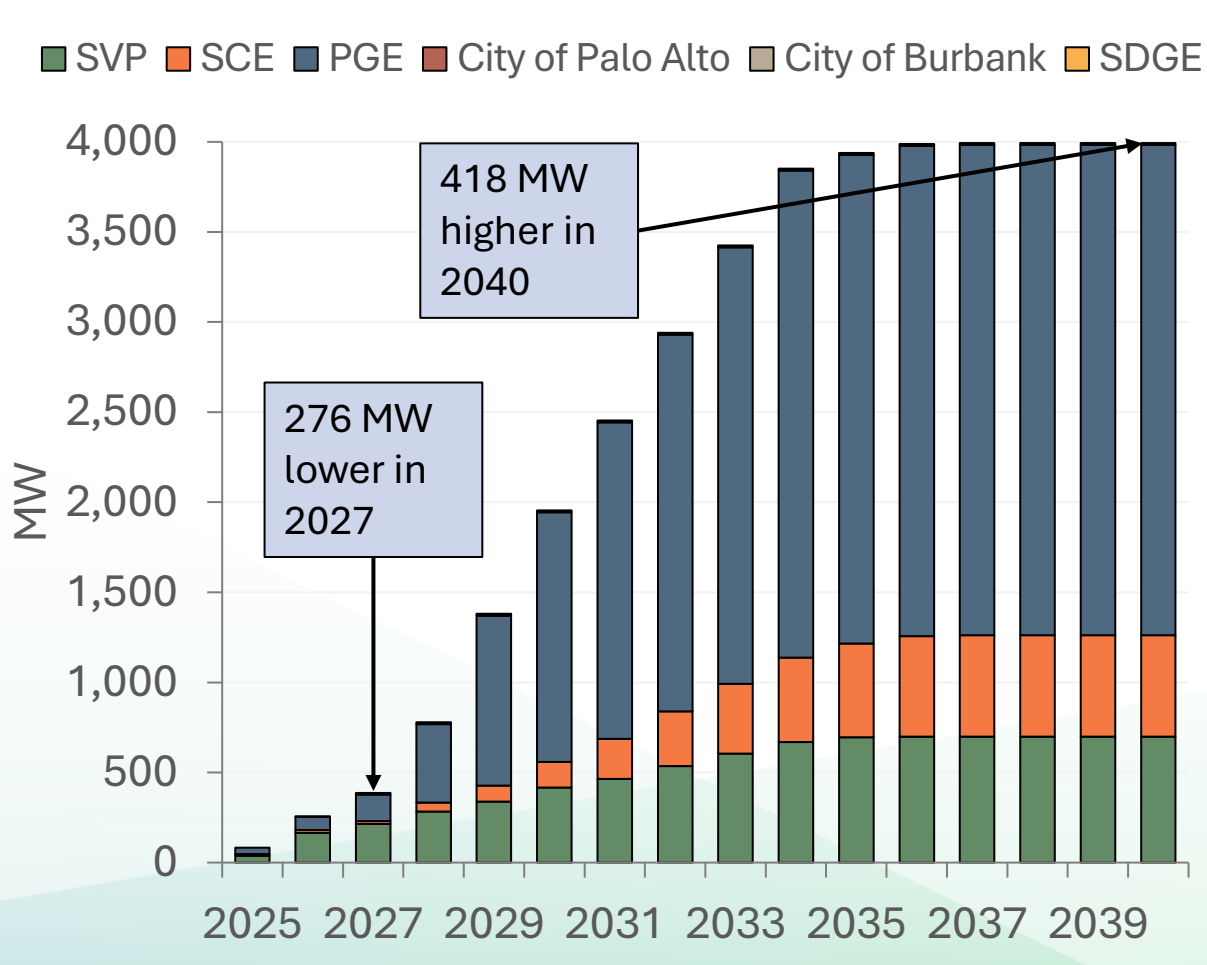


Statewide Data Center Max Demand Mid Case

2024 IEPR Mid Case



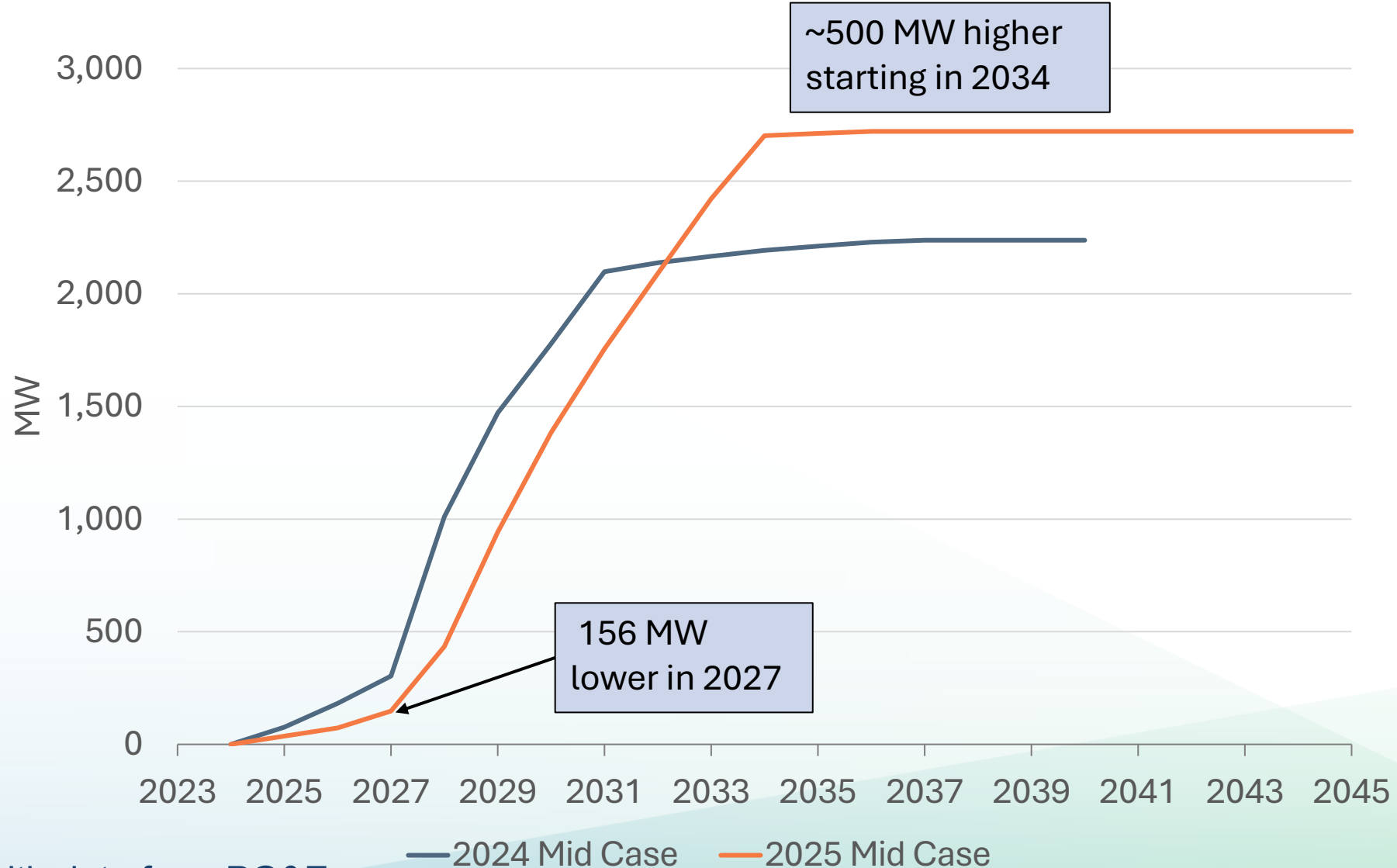
2025 IEPR Mid Case



Source: CEC



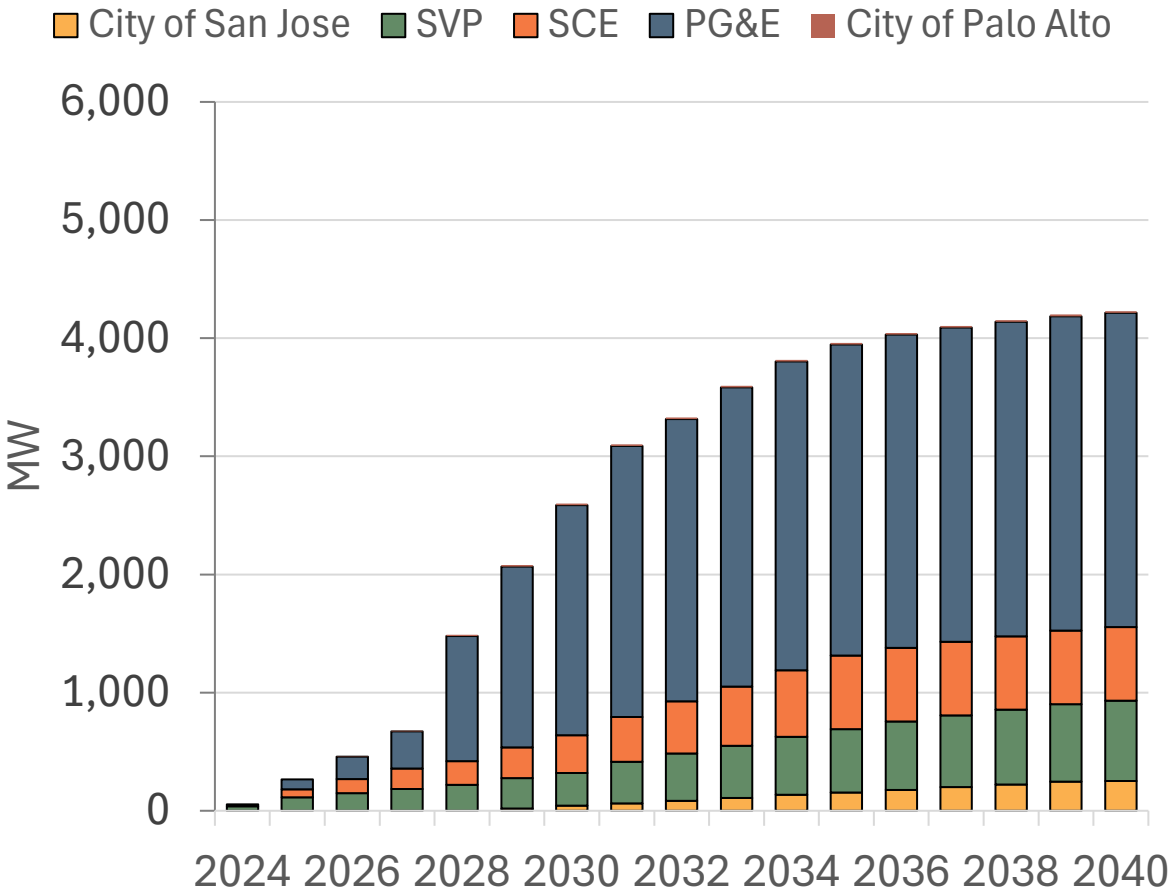
PG&E Data Center Peak Demand Mid Case Compared to 2024 IEPR



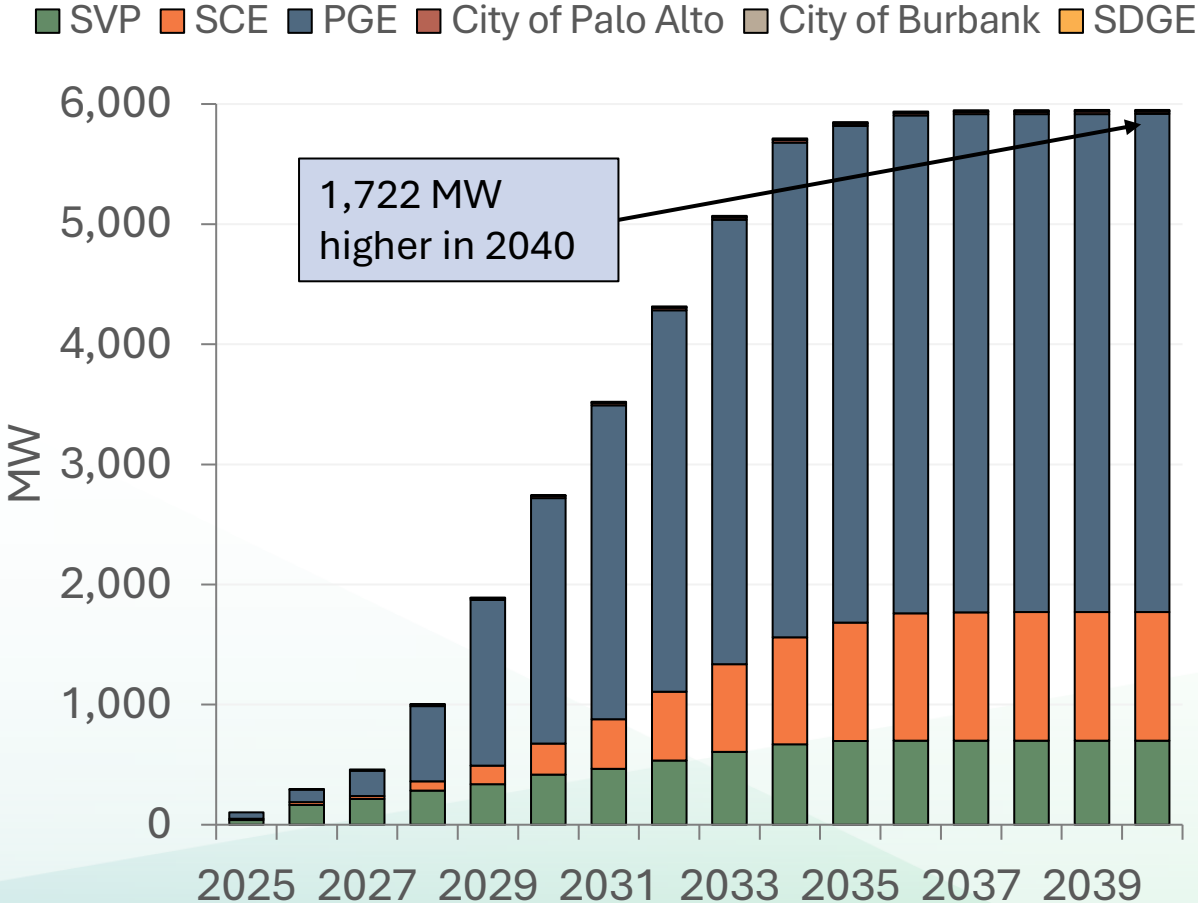


Statewide Data Center Max Demand High Case

2024 IEPR High Case



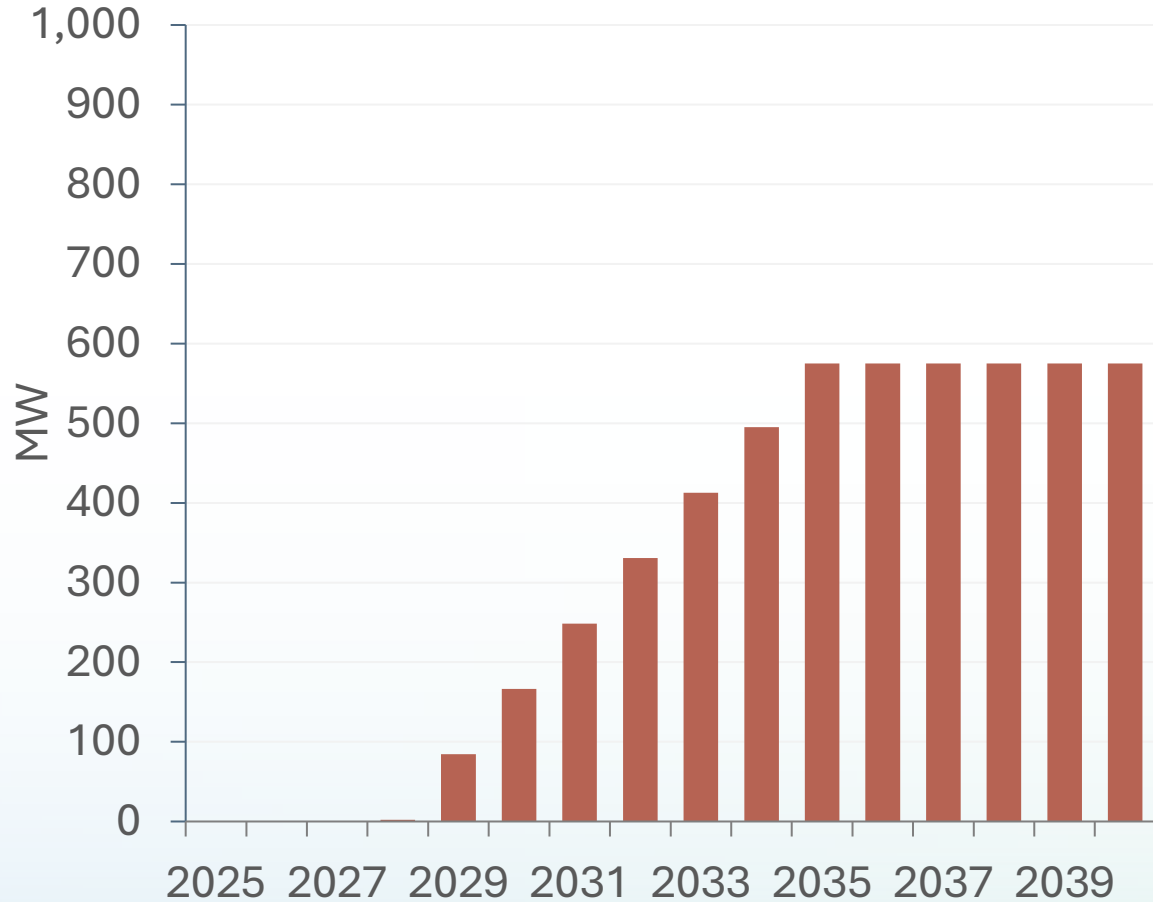
2025 IEPR High Case



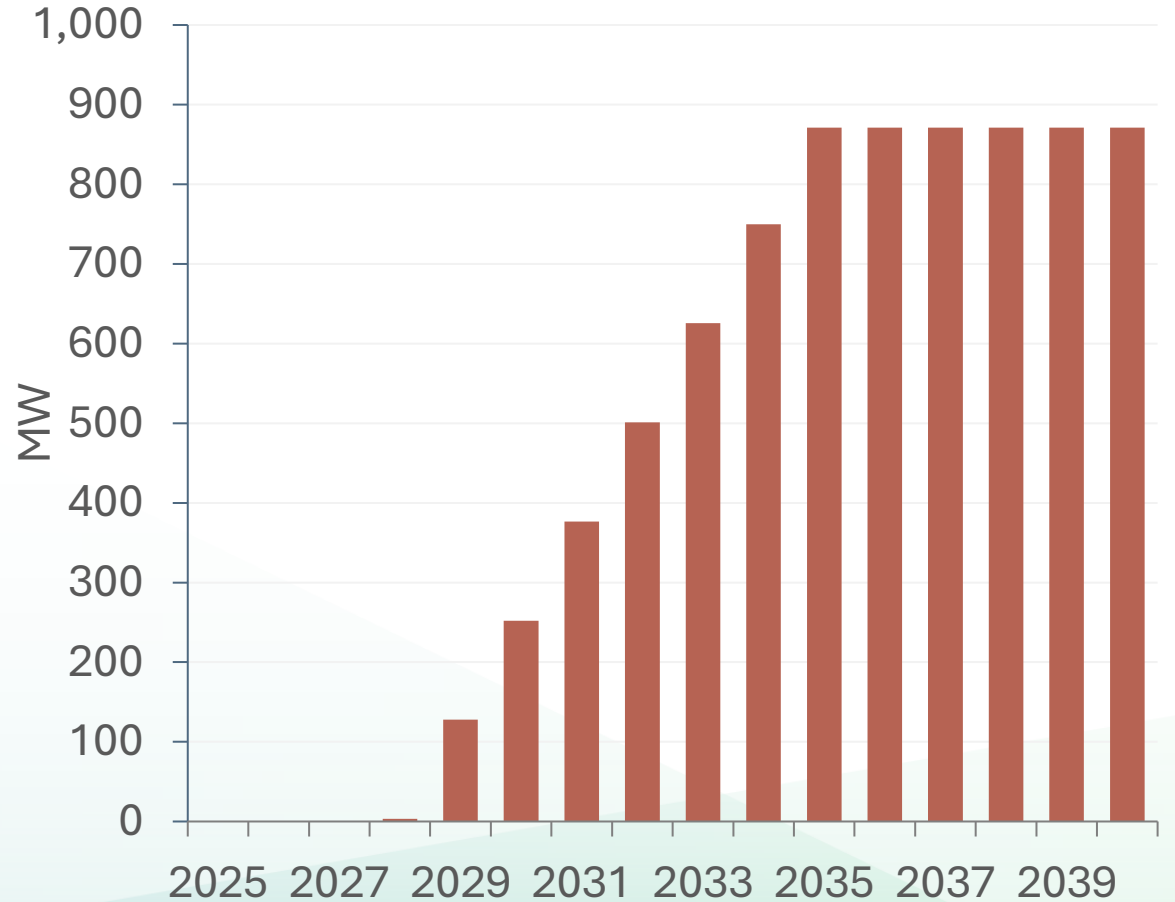


VEA Data Center Max Demand

2025 IEPR Mid Case



2025 IEPR High Case





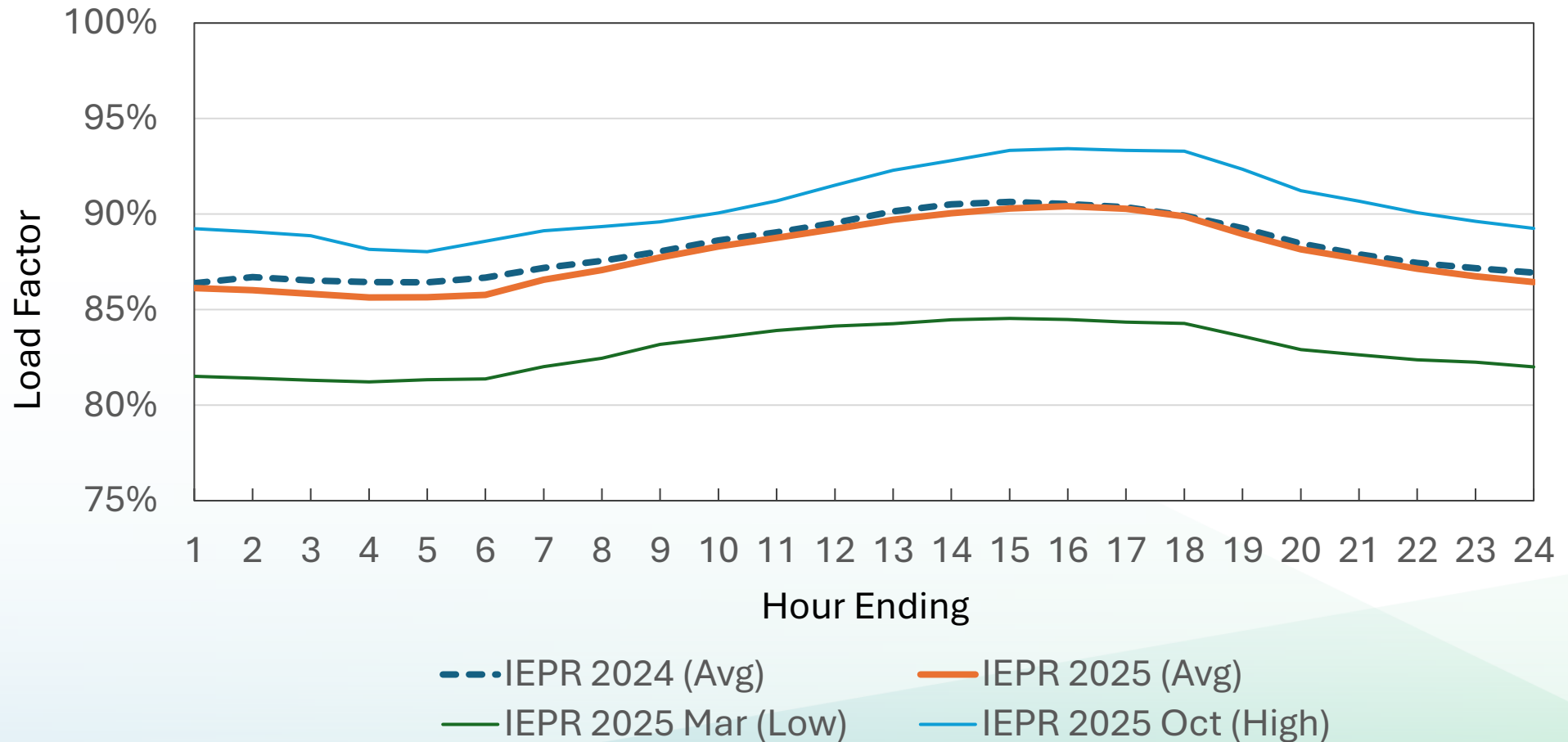
Hourly Load Methodology

	2024	2025
Data Source	AMI data from sample of 50 data centers	AMI data from sample of 50 data centers
Sample Service Territory	PG&E	PG&E
Aggregation Method	Weighted-average load factor profile	Weighted-average load factor profile
Unique Profiles	Daytype	Month and Daytype



IEPR 2025 vs. 2024 (Weekday)

Weekday Data Center Hourly Load Factor Profiles
(IEPR 2025 vs. IEPR 2024)

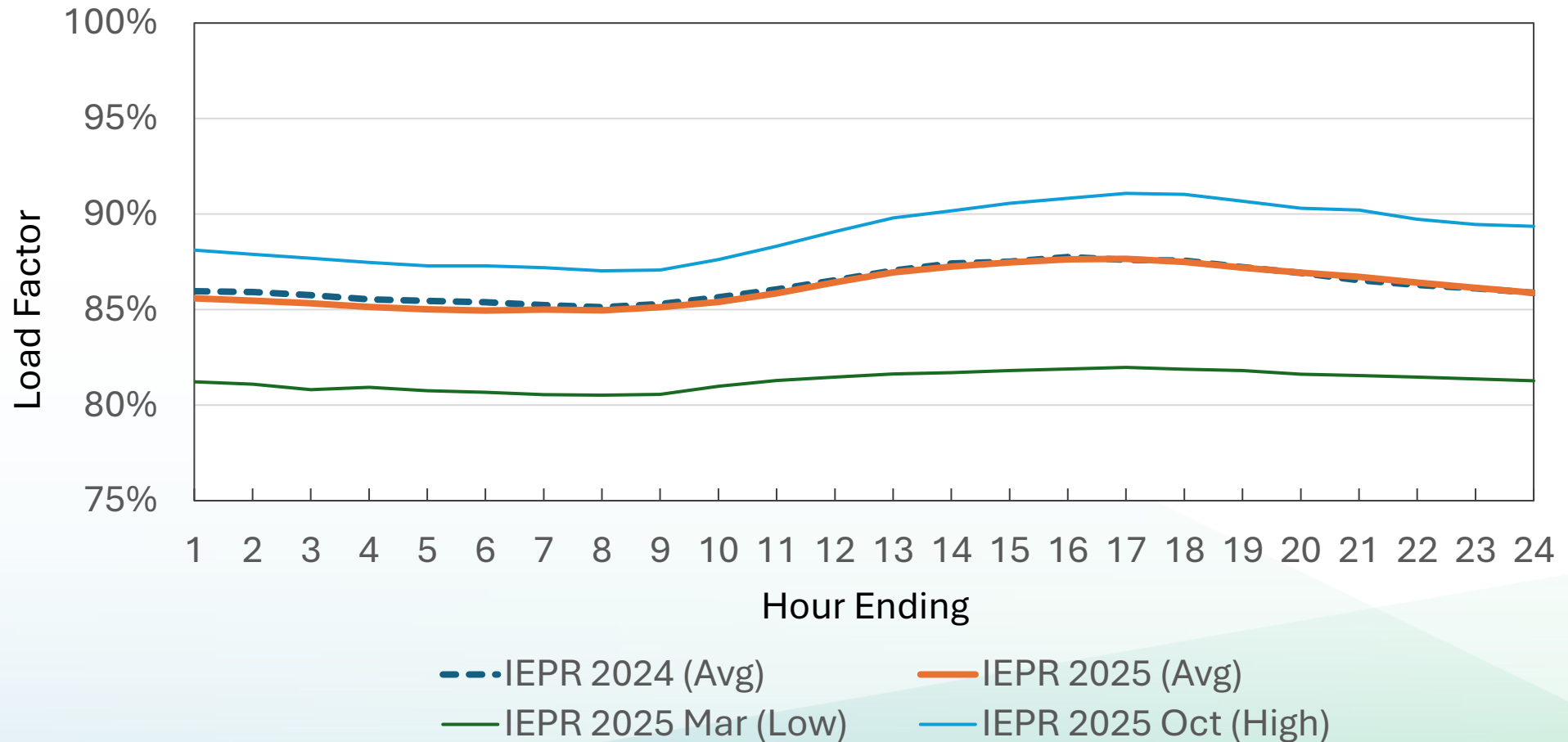


Source: CEC



IEPR 2025 vs. 2024 (Weekend)

Weekend Data Center Hourly Load Factor Profiles
(IEPR 2025 vs. IEPR 2024)



Source: CEC

Thank You!



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