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Brief History of CA Electricity Mkt 1998 - 2017

1998
- Energy Crisis: CA Energy Crisis costs CA ratepayers tens of billions of dollars and forces PG&E into bankruptcy.

2001-02
- De-Regulation: Legislature orders a transition to customer choice and orders utilities to divest their power generation to independent providers under contract.

2002
- CCA Law Enacted: CA Legislature passes AB 117 which creates initial regulations to allow formation of Community Choice Aggregators.

2006
- Re-regulation: SB 1 and SB 107 pass legislature, creating 3,000 MW California Solar Initiative and setting RPS at 20% by 2010. This policies are catalysts of future CA renewables growth.

2010
- Marin forms CCA: Marin County forms CAs first CCA.
- Storage Mandate: AB 2514 passes requiring Utilities to procure 1.3 GWs of energy storage.

2014
- SB 350: SB 350 increases RPS to 50% by 2030. Requires doubling of energy efficiency and halving of gasoline use.
- HHZ Biomass: SB 859 requires the utilities to procure biomass from high fire hazard fuel sources to combat tree mortality.

2016
- NEM 2.0: Commission approves revisions to NEM that include TOU requirement, removal of cap and agreement to consider again in 2019. NEM installations also surpass 500,000 customers.

2017
- CCAs serve 1,000,000 customers.
Does Technology Drive Customer Choice?

PV Prices ($/W) vs. NEM & CCA Customers
- MCE has not launched
- NEM serves less than 55k
- DA capped at just under 13%
- IOU dominant retail provider

2010: retail market

- DA – 13%
- NEM – 1%
- IOU – 86%

2016: retail market in transition

- DA – 13%
- CCA – 5%
- IOU – 76%

- CCAs active across Bay Area (serve 1m)
- NEM serves 660k
- DA unchanged
- IOU still primary provider for most Californians

2020: future of retail market?

- DA – 13%
- NEM – 10%
- IOU – 86%
- CCA – 67%

- CCA active in LA County, San Diego County, and across Bay Area
- NEM serves over 1m customers
- DA unchanged
- IOU serves what’s left
Thank you!
For Additional Information:

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