

DOCKETED

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CPUC'S IOU POTENTIAL STUDY

PRESENTATION TO JOINT AGENCY IEPR
WORKSHOP

JULY 11, 2016

NAVIGANT

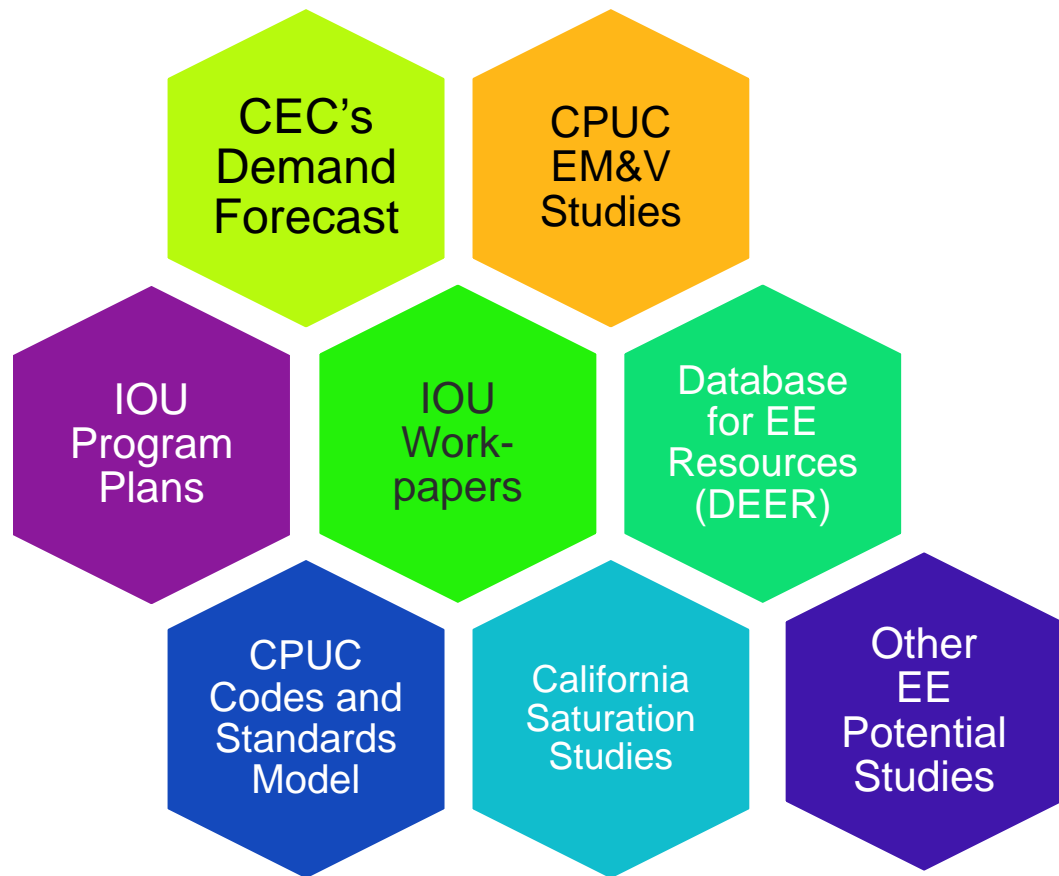
IOU POTENTIAL STUDY OVERVIEW

- General Scope:
 - Bottom-up model forecasting energy efficiency (EE) savings in 4 IOU service territories
 - 200+ technologies, 6 sectors, 16 climate zones, multiple building types
 - Includes savings from Codes and Standards, Behavior, and Financing programs
 - Calibrated to historic EE adoption rates and reflective of current CPUC policies
- Recent history of the IOU potential study:
 - Studies completed in 2011 and 2013
 - 2015 Potential Study – Sets goals for 2016 & beyond
 - 2016 AB802 Study – Identifies additional savings potential stemming from AB802



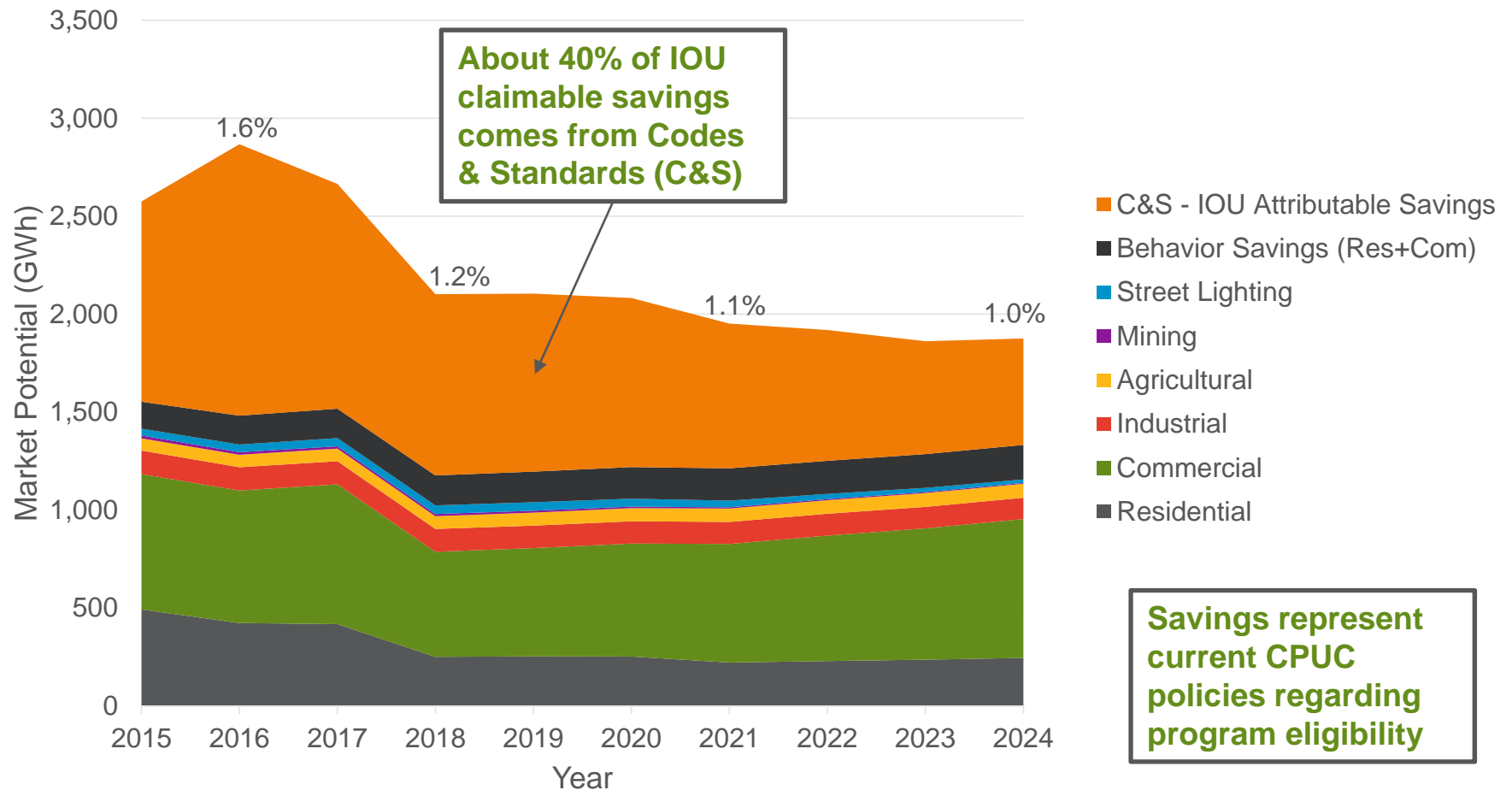
DATA SOURCES AND GRANULARITY

- Potential studies rely exclusively on existing data sources
- All measure level data based on an annual savings basis (no monthly or hourly variation is tracked)
- Demand savings are based on DEER definition of the peak hours

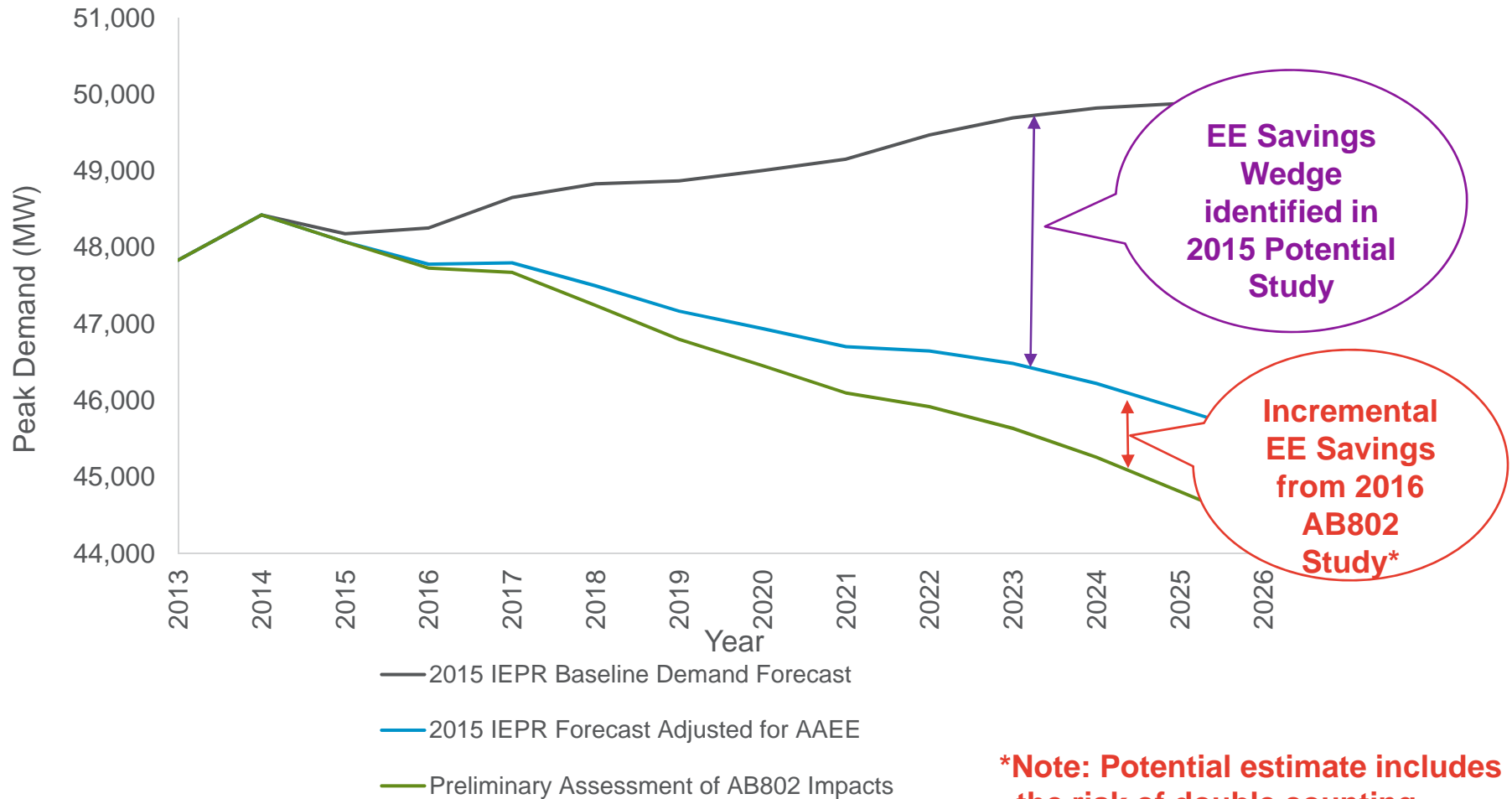


2015 POTENTIAL STUDY RESULTS

Incremental electric savings (prior to AB802 and SB350)

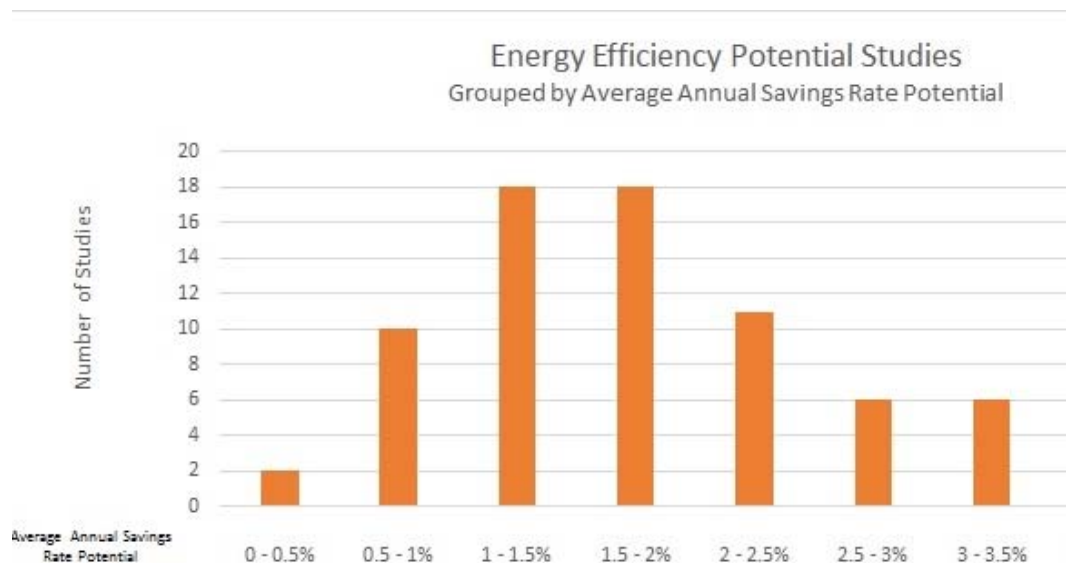


POTENTIAL STUDY RESULTS REFLECTED IN THE DEMAND FORECAST



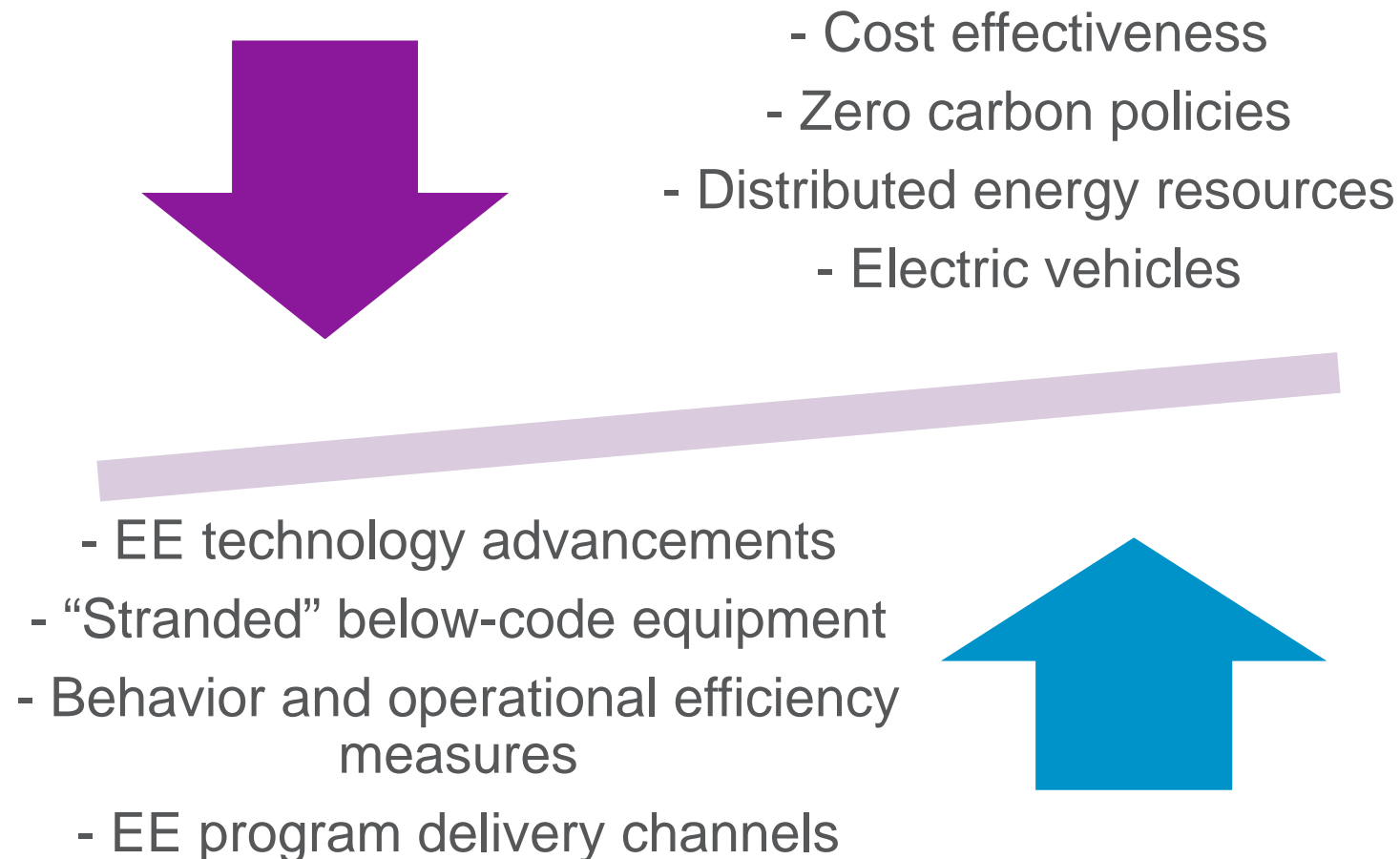
EE POTENTIAL ACROSS THE US

- DOE recently compiled a summary of 75 EE potential studies completed since 2007
- Results indicate that the average annual savings percentage savings is around 1.5% per year
- Most other parts of the US are implementing traditional EE programs w/ significant untapped potential
- EE continues to thrive in deregulated markets (e.g., New England, PJM, Texas)
- Increasing emphasis on integrating EE programs with other distributed energy resources (e.g., New York, Hawaii, Arizona)
- Renewed interest in market transformation initiatives (e.g., Pacific Northwest)



Source: USDOE, EE Potential Studies Catalog

THE PATH TO DOUBLING ENERGY SAVINGS – OPPORTUNITIES AND POTENTIAL CHALLENGES



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