

DOCKETED

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PG&E CCA Forecast Update

CEC Demand Forecasting Update Meeting

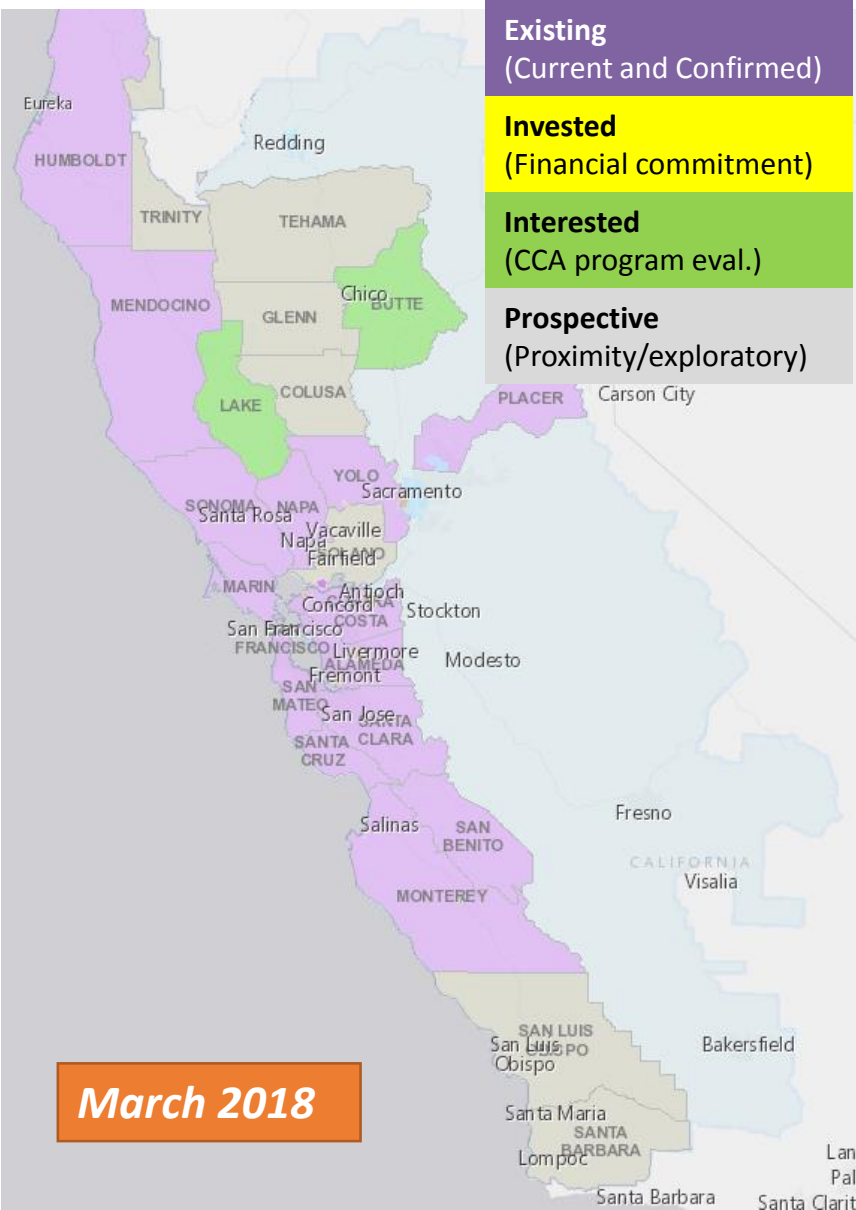
July 10, 2018



Together, Building
a Better California



CCA Activity is Rapidly Expanding

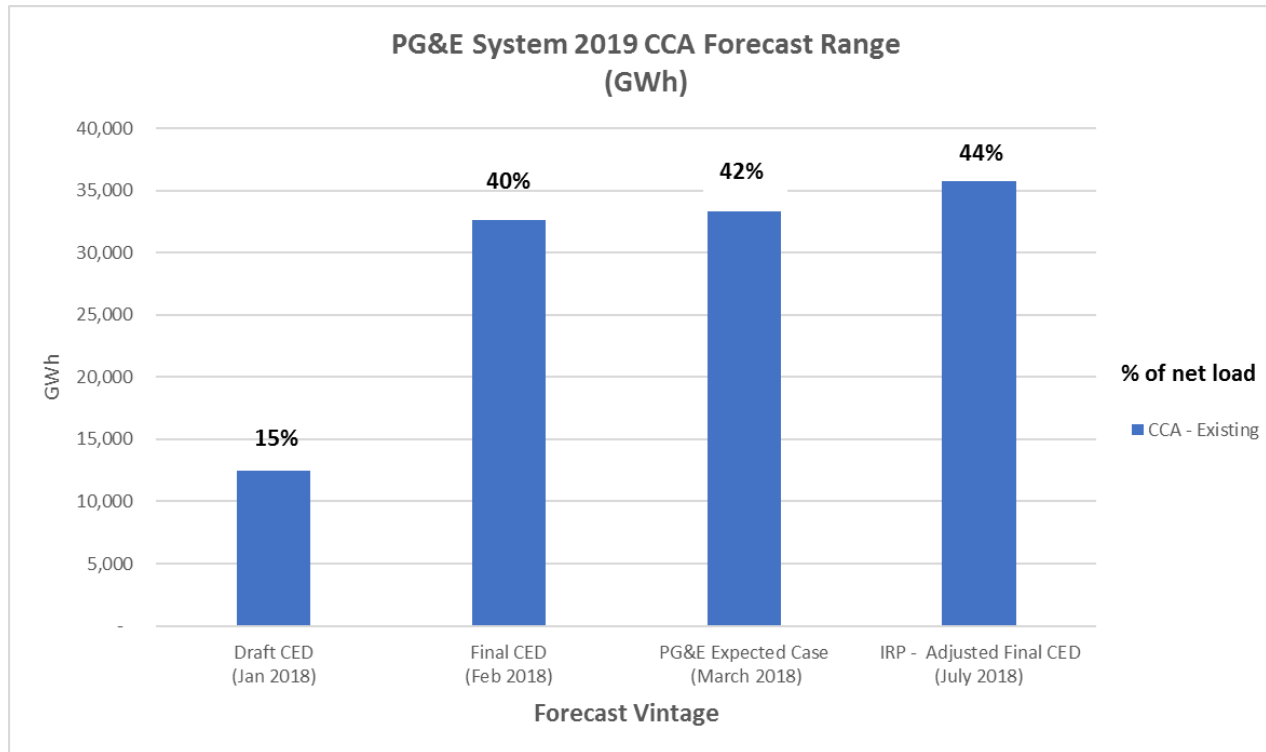


- **Load forecasting informs long-term planning**
 - Renewable procurement
 - Reliability procurement
 - Other state-level policies (e.g., GHG reduction)
- **PG&E system load shift to CCAs is accelerating rapidly**
- **PG&E forecasts CCA load growth of ~23,000 GWh in 2018 and 2019; this reduces PG&E system bundled sales from 75% (2017) to 46% (2019)**

	EOY 2016 (Recorded)	EOY 2017 (Recorded)	March 2018 (Recorded)	EOY 2019 (PG&E Forecast)
PGE Bundled	84%	75%	71%	46%
CCA	5%	14%	17%	42%
DA + BART	11%	11%	12%	12%

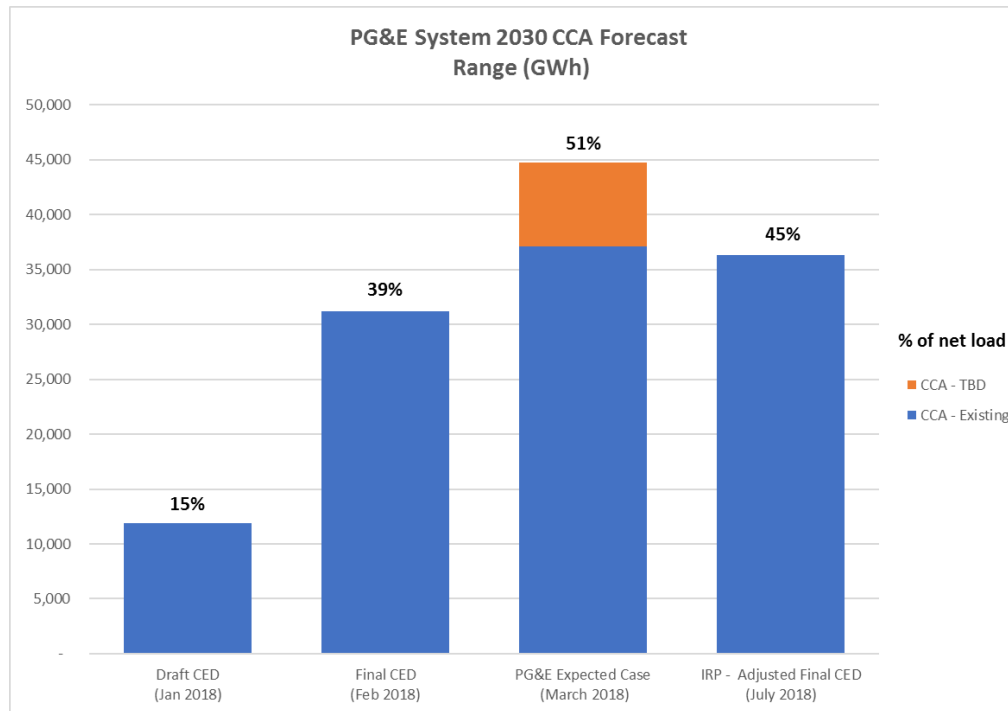


CCA Forecasts Are Largely Aligned in Near-Term



- Near-term (1-2 years out) forecasts are well-aligned as a result of coordination between PG&E, CEC and CCAs
 - CPUC Resolution E-4907 increases certainty by requiring CCAs to file implementation plans by January 1 the year before starting service
 - An annual meet and confer process between PG&E and CCAs as part of annual RA/ERRA forecast proceeding provides additional insight into near-term plans
 - PG&E and CEC worked closely together to close the gap between forecasts in early 2018

CCA Forecasts Diverge in Long-Term



- Long-term forecasts diverge¹; PG&E Expected Case is 40% higher than Final CED forecast
 - CCA have no obligation to file implementation plans beyond 1-year ahead and can diverge from implementation plans driving lack of certainty for mid-to-long-term forecasts
 - **CED forecast assumes no expansion beyond current implementation plans**
 - PG&E currently projects the mid-to-long-term expansion of CCAs by assigning probability-weighted “likelihood of load loss” to forecast areas, based on current status of CCA activity
 - PG&E recommends that long-term forecasting approaches capture potential expansion of the CCA business model through stochastic analysis, scenario analysis, probability weighting or other approaches.

¹ CPUC Staff White Paper, Consumer and Retail Choice, the Role of the Utility, and an Evolving Regulatory Framework, May 2017, p. 3.; implies up to 85% of load served by DA, CCA and DG. PG&E assumes 12% DA+BART.

Appendix





PG&E 2019 ERRR CCA Forecast

Line No.	Description	2019 ENERGY REQUIREMENTS (GWH)												Total
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
1	Energy Load (GWh)													
2	Retail Sales ¹													86,600
3	Conservation and Energy Efficiency	(346)	(346)	(346)	(346)	(346)	(346)	(346)	(346)	(346)	(346)	(346)	(346)	(4,155)
4	Distributed Generation													
5	Solar	(72)	(85)	(140)	(160)	(187)	(192)	(195)	(182)	(157)	(136)	(96)	(81)	(1,682)
6	CHP	(4)	(4)	(4)	(4)	(4)	(4)	(4)	(4)	(4)	(4)	(4)	(4)	(54)
7	Fuel Cell & Other	(18)	(18)	(18)	(18)	(18)	(18)	(18)	(18)	(18)	(18)	(18)	(18)	(217)
8	Electric Vehicles	36	36	36	36	36	36	36	36	36	36	36	36	436
9	Electrification	2	2	2	2	2	2	2	2	2	2	2	2	23
10	Direct Access													
11	Direct Access	(747)	(758)	(758)	(784)	(803)	(830)	(861)	(873)	(863)	(805)	(792)	(759)	(9,631)
12	Community Choice Aggregation													
13	Marin Clean Energy	(479)	(416)	(419)	(413)	(433)	(474)	(488)	(507)	(489)	(451)	(448)	(481)	(5,498)
14	Sonoma Clean Power	(227)	(193)	(199)	(187)	(195)	(207)	(216)	(226)	(214)	(203)	(200)	(228)	(2,496)
15	Clean Power San Francisco	(168)	(167)	(159)	(205)	(234)	(232)	(262)	(303)	(295)	(289)	(298)	(297)	(2,907)
16	Peninsula Clean Energy	(320)	(303)	(285)	(288)	(283)	(288)	(296)	(313)	(309)	(295)	(310)	(318)	(3,609)
17	Silicon Valley Clean Energy	(334)	(318)	(304)	(309)	(314)	(335)	(346)	(342)	(363)	(335)	(335)	(339)	(3,974)
18	Redwood Coast Energy Authority	(61)	(55)	(61)	(58)	(59)	(58)	(59)	(58)	(56)	(60)	(59)	(63)	(705)
19	Pioneer Community Energy	(95)	(82)	(76)	(76)	(86)	(104)	(122)	(122)	(110)	(81)	(86)	(96)	(1,138)
20	Monterey Bay Community Power	(283)	(272)	(264)	(284)	(292)	(295)	(311)	(319)	(311)	(290)	(280)	(273)	(3,474)
21	Valley Clean Energy	(56)	(51)	(47)	(53)	(66)	(81)	(88)	(82)	(69)	(57)	(53)	(54)	(756)
22	East Bay Community Energy	(543)	(517)	(479)	(480)	(473)	(497)	(510)	(518)	(507)	(465)	(479)	(498)	(5,964)
23	King City Community Power	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(3)	(4)	(3)	(3)	(3)	(38)
24	San Jose Community Energy	(13)	(13)	(165)	(323)	(325)	(363)	(386)	(396)	(374)	(321)	(326)	(341)	(3,347)
25	UFE, Transmission & Distribution Losses	288	237	269	239	285	313	377	356	302	267	222	249	3,405
26	Total Requirement													40,817
27	¹ Retail sales excludes BART energy requirements.													