

## **Demand Forecast Data Request for 2027 Resource Adequacy**

**Background:** D.22-06-050 in proceeding R.21-10-002 adopted the slice of day framework for Resource Adequacy. The purpose of this data request is to collect forecasts and supporting data from CPUC-jurisdictional LSEs to support development of 24-hour per month LSE forecasts for determining RA obligations.

**Confidentiality:** On June 25, 2009, the CEC and CPUC executed an “Interagency Information Request and Confidentiality Agreement” which specifies how the CEC may use confidential Resource Adequacy data. The data requested in this template are subject to the protections of Section 583 of the California Public Utilities Code and that interagency agreement.

### **General Instructions:**

The basis for forecast data should be load net of excess behind the meter production, not gross load. The time basis should be Pacific Standard Time (PST) in all months, not prevailing time.

### **Forecast Summary**

On this form LSEs report, by TAC, monthly retail sales (at the customer side of the meter), monthly energy requirements to serve load (including distribution losses), and the monthly peak projected on Form 1.

### **Form 1: Hourly Forecast of Managed Load on the Day of LSE's Monthly Maximum Demand**

For each TAC, each LSE reports their best estimate of hourly loads on the day of the LSE's monthly peak demand. Data should include distribution losses. For IOUs, a bundled customer forecast is requested on Form 1.

### **Form 1b: Distribution Service Area. (IOUs Only)**

IOUs report the total hourly forecasted load for the distribution service area by service type. The service type categories are bundled, community choice, direct access, and other (such municipal departed load).

### **Form 3: Demand Modifier Impacts**

Form 3 is intended to report the hourly peak day impacts of demand modifiers included in the LSE forecasts reported on Form 1. Form 3 categories parallel the demand modifiers in the CEC forecast such as energy efficiency, distributed generation, battery storage, transportation electrification, and data centers. All LSEs with potential new data center load identified in the meet and confer/data exchange process with IOUs should use this form to report the data center load included in their forecast.

LSEs may also add columns to Form 3 identify specific programs or tariffs that have load modifying effects comparable to CEC categories. Characteristics of those programs should be documented as requested in the Documentation section. If the program design is revised after forecast submission, the LSE must notify CEC.

To be eligible for inclusion in the forecast as a load modifier, load modification must be daily, consistent, predictable and verifiable. After implementation, that impact is assumed embedded in recorded data and cannot be shown as a modifier in future forecasts. Impacts are to be reported on

a cumulative basis incremental to the last historical year. For example, while the first forecast year would reflect only impacts resulting from demand modifiers deployed in that year, the second forecast year would reflect impacts from deployments in that year as well as residual impacts from the previous year, and so on. For RA 2027, data should be cumulative impacts incremental to recorded 2025 loads.

Programs that trigger load only during predetermined system conditions and/or are integrated into the CAISO market and are therefore eligible for RA valuation should not be included in the demand forecast.

The current IEPR forecast does not include any impacts from dynamic pricing tariffs such as the pilot studies currently way. The expanded pilots are funded by distribution rates for the benefit of all LSEs, so allocation of load impacts to individual LSEs would conflict with CPUC D.24-01-032. As evaluation results become available, CEC and CPUC will consider how to include future dynamic rate impacts in the IEPR and RA forecast processes. However, for RA 2027, dynamic pricing should not be included in RA forecasts.

### **Form 3a: Supporting data on Load modifiers (Only if Applicable)**

For certain demand modifiers, LSEs may quantify “installations” as part of their forecast analysis. LSEs should report such an installations metric, when relevant, and identify the specific units. For example, LSEs may report MW of installed PV capacity or number of light-duty vehicle adoptions.

### **Form 3b: Supporting data on BTM Storage (Only if Applicable)**

LSEs who included incremental BTM storage procurement impacts in their forecast are also required to provide:

- 1) With the initial forecast, provide for each sector and configuration type simulated hourly or, if available, comparable actual hourly storage generation performance for similar installations.
- 2) The following year, provide actual hourly performance data for installed resources and installation schedule. LSEs who included storage procurement in their RA 2026 forecasts should submit 2025 recorded data with their RA 2027 forecast. See Form 3b for the fields requested.

### **Form 4: IOU Forecasts of CCA departing load (IOUs only)**

On this form IOUs report their forecast of monthly energy, including distribution losses, for each CCA in their service area.

### **Load Forecast Documentation**

Provide a description of the data, methodology, and key assumptions used to develop the forecast, in particular methods used to develop an hourly forecast. For the August revision, explain why the forecast revision complies with CPUC requirements on eligible load migration (D.19-06-026).

LSEs should describe their assumptions about opt-out rates, renewal of expiring contracts, new customer additions, and the rationale for those assumptions. Submissions may include information related to particular customers that will be retained or will depart.

As applicable, LSEs should also provide narrative description or supporting data on the following aspects of their forecast methodology:

- Weather normalization methods.
- LSE-specific economic or demographic factors affecting the forecast.
- Load Modifiers: Describe the methods, assumptions, and data sources for load modifier impacts on Form 3. List and provide documented studies or sources used to support these assumptions.
  - For specific programs or tariffs identified on Form 3, describe the characteristics of the program, such as tariff design, funding, contractual arrangements, and program participation assumptions.
  - Explain the basis for forecasted growth in distributed energy resources such as photovoltaic and battery energy storage systems.
  - For BTM storage, discuss the following items:
    - Power rating, capacity, type, configuration (stand-alone/paired)
    - Expected number of new interconnections and installation timeline
    - Anticipated charge and discharge schedule of systems, operating criteria, and depth of discharge.
- Data centers or other large loads:
  - Describe inputs and assumptions used to develop the forecast, such as energization dates, project status, utilization rate, and load ramping schedule.
  - Discuss sources of differences between the estimated load or interconnection application data provided by the IOU and the LSE's submitted forecast.
  - Describe any load flexibility included in the forecast, how it was estimated, and how it complies with the criteria for load modifier inclusion described in the Form 3 instructions.