

## Archived

# CSI Incentives Budget Report

The tables below summarize the committed and remaining budgets for the California Solar Initiative, and include estimates of how far the remaining budget will last through the step table, as well as the amount of additional funding necessary to achieve program goals. These tables have been created to meet the requirements defined in [ordering paragraphs 5 and 6](#) of CPUC decision [\(D.\) 10-09-046](#).

This report is current as of June 30, 2017.

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#### 1. Ordering Paragraph 5: Program Achievements Currently Forecasted

		Program Goals		Confirmed		Under Review		Remaining		Program Achievements Currently Forecasted		
		Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Budget (\$)	Capacity (MW)	Final Step	Portion of Final Step (MW)
PG&E	Residential	252.368	211,628,000	257.656	209,688,382	0.000	0	9.679	<a href="#">1,939,619</a>	267.335	10	83.027
	Non-Residential	512.383	666,164,970	512.679	659,207,761	0.000	0	15.986	<a href="#">6,957,209</a>	528.665	10	148.573
	Total	764.750	877,792,970	770.335	868,896,143	0.000	0	25.665	<b>8,896,827</b>	796.000	N/A	N/A
SCE	Residential	265.650	222,767,000	307.983	218,798,310	0.000	0	19.800	<a href="#">3,968,690</a>	327.783	10	159.093
	Non-Residential	539.350	645,225,600	626.827	639,239,441	0.068	16,810	16.458	<a href="#">5,969,349</a>	643.353	10	323.173
	Total	805.000	867,992,600	934.810	858,037,751	0.068	16,810	36.258	<b>9,938,039</b>	971.136	N/A	N/A
CSE	Residential	84.507	54,885,000	93.137	54,857,559	0.000	0	0.137	<a href="#">27,441</a>	93.274	10	57.216
	Non-Residential	95.743	147,139,430	113.974	146,343,382	0.000	0	2.156	<a href="#">796,048</a>	116.130	10	32.417
	Total	180.250	202,024,430	207.111	201,200,941	0.000	0	2.293	<b>823,489</b>	209.404	N/A	N/A
TOTAL	Residential	<b>602.525</b>	<b>489,280,000</b>	<b>658.776</b>	<b>483,344,250</b>	<b>0.000</b>	<b>0</b>	<b>29.615</b>	<b>5,935,750</b>	<b>688.392</b>	<b>N/A</b>	<b>N/A</b>
	Non-Residential	<b>1,147.475</b>	<b>1,458,530,000</b>	<b>1,253.480</b>	<b>1,444,790,585</b>	<b>0.068</b>	<b>16,810</b>	<b>34.600</b>	<b>13,722,605</b>	<b>1,288.148</b>	<b>N/A</b>	<b>N/A</b>
	Total	<b>1,750.000</b>	<b>1,947,810,000</b>	<b>1,912.256</b>	<b>1,928,134,835</b>	<b>0.068</b>	<b>16,810</b>	<b>64.216</b>	<b>19,658,355</b>	<b>1,976.540</b>	<b>N/A</b>	<b>N/A</b>

#### 2. Ordering Paragraph 6: Forecasted Funding Surplus

All values in \$USD		Allocated Funds	Confirmed <sup>1</sup>		Under Review <sup>2</sup>		Remaining Funds <sup>3</sup>	To Reach Goals		Funding Surplus <sup>6</sup>
		D.10-09-046 Table #7	Non-Perf. Adj. <sup>5</sup>		Non-Perf. Adj. <sup>5</sup>			Incremental from Confirmed <sup>4</sup>	Total	
PG&E	Residential	211,628,000	209,417,792	209,688,382	0	0	<a href="#">1,939,619</a>	0	208,638,199	2,989,801
	Non-Residential	666,164,970	616,768,201	659,207,761	0	0	<a href="#">6,957,209</a>	0	659,114,066	7,050,904
	Total	877,792,970	826,185,993	868,896,143	0	0	<b>8,896,827</b>	0	867,752,265	10,040,705
SCE	Residential	222,767,000	218,415,994	218,798,310	0	0	<a href="#">3,968,690</a>	0	210,386,053	12,380,947
	Non-Residential	645,225,600	604,945,304	639,239,441	16,810	16,810	<a href="#">5,969,349</a>	0	613,523,923	31,701,677
	Total	867,992,600	823,361,297	858,037,751	16,810	16,810	<b>9,938,039</b>	0	823,909,976	44,082,624
CSE	Residential	54,885,000	54,705,816	54,857,559	0	0	<a href="#">27,441</a>	0	53,134,115	1,750,885
	Non-Residential	147,139,430	136,041,754	146,343,382	0	0	<a href="#">796,048</a>	0	140,054,632	7,084,798
	Total	202,024,430	190,747,570	201,200,941	0	0	<b>823,489</b>	0	193,188,747	8,835,683
TOTAL	Residential	<b>489,280,000</b>	<b>482,539,602</b>	<b>483,344,250</b>	<b>0</b>	<b>0</b>	<b>5,935,750</b>	<b>0</b>	<b>472,158,367</b>	<b>17,121,633</b>
	Non-Residential	<b>1,458,530,000</b>	<b>1,357,755,259</b>	<b>1,444,790,585</b>	<b>16,810</b>	<b>16,810</b>	<b>13,722,605</b>	<b>0</b>	<b>1,412,692,621</b>	<b>45,837,379</b>

	<b>Total</b>	<b>1,947,810,000</b>	<b>1,840,294,861</b>	<b>1,928,134,835</b>	<b>16,810</b>	<b>16,810</b>	<b>19,658,355</b>	<b>0</b>	<b>1,884,850,988</b>	<b>62,959,012</b>
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**Notes:**

- "Confirmed" projects are those that have reached or surpassed the Reservation Reserved, Confirmed Reservation, or Pending RFP status in PowerClerk and are not Delisted (i.e., not Cancelled or Withdrawn). Dollars indicate PBI-related incentive commitments.
- "Under Review" projects are those that are currently in Reservation Request Review or Suspended - Reservation Review status in PowerClerk and are not Delisted (i.e., Cancelled or Withdrawn). Dollars indicate PBI-related incentive commitments.
- "Remaining Funds" indicates the difference between the "Allocated Funds" and the sum of the "Confirmed" and "Under Review" projects. The presence of "Remaining Funds" for a given Program Administrator does not mean that funds are available to incentivize additional projects. The "Remaining Funds" are dedicated to meeting existing PBI incentive commitments, which may be greater than forecasted due to higher than expected performance, including elevated performance by PV systems with tracking systems.
- "To Reach Goals from Confirmed Incremental" is the amount of incentive dollars needed to reach sector-specific program goals assuming all "Confirmed" and "Under Review" projects are completed.
- Unless otherwise noted, all incentive dollar fields include an adjustment upwards for PBI projects, by 6% for SCE, 8% for CSE and 7.5% for PG&E, to account for higher than expected performance (per the CSI 2009 Impact Evaluation). Please note, PG&E decreased their adjustment from 7.7% to 7.5% on January 25, 2014 based on review of PV system performance in recent years within PG&E's territory.
- "Funding Surplus" shows the difference between "Allocated Funds" and "Total to Reach Goals". A negative value indicates a shortfall in funding to meet a program's goals.
- Values shown include capacity and incentives from CSI Thermal Electric and Non-PV generating technologies, as shown in the tables below.

**3. Ordering Paragraph 6: Confirmed, Completed or PBI in Payment, and Paid Incentive Dollars by Incentive Type**

All Values in \$ USD		Confirmed <sup>8</sup>				Completed or PBI in Payment <sup>9</sup>				Paid <sup>10</sup>			
		EPBB	PBI	Thermal Electric <sup>11</sup>	Total	EPBB	PBI	Thermal Electric <sup>11</sup>	Total	EPBB	PBI	Thermal Electric <sup>11</sup>	Total
PG&E	Res	205,632,854	3,878,450	177,078	209,688,382	205,632,854	3,878,450	177,078	209,688,382	205,630,820	3,798,026	177,078	209,605,924
	Non Res	50,891,055	608,300,366	16,340	659,207,761	50,884,794	606,682,364	16,340	657,583,498	50,884,597	574,138,780	16,340	625,039,717
	Total	256,523,909	612,178,816	193,418	868,896,143	256,517,648	610,560,813	193,418	867,271,879	256,515,417	577,936,806	193,418	834,645,641
SCE	Res	211,981,716	6,754,250	62,344	218,798,310	211,961,568	6,754,250	62,344	218,778,162	211,941,404	6,006,628	62,344	218,010,376
	Non Res	33,371,378	605,863,101	4,963	639,239,441	33,187,145	566,711,166	653	599,898,964	33,200,745	456,173,240	653	489,374,638
	Total	245,353,094	612,617,350	67,307	858,037,751	245,148,713	573,465,416	62,997	818,677,126	245,142,149	462,179,869	62,997	707,385,014
CSE	Res	52,706,454	2,048,523	102,582	54,857,559	52,663,135	2,048,523	102,582	54,814,240	52,663,135	1,935,241	102,582	54,700,958
	Non Res	7,252,944	139,071,978	18,461	146,343,382	7,224,732	136,793,980	18,461	144,037,172	7,224,732	113,524,197	18,461	120,767,389
	Total	59,959,397	141,120,500	121,043	201,200,941	59,887,866	138,842,503	121,043	198,851,412	59,887,866	115,459,438	121,043	175,468,347
TOTAL	Res	470,321,024	12,681,222	342,004	483,344,250	470,257,557	12,681,222	342,004	483,280,783	470,235,358	11,739,895	342,004	482,317,257
	Non Res	91,515,376	1,353,235,445	39,764	1,444,790,585	91,296,670	1,310,187,510	35,454	1,401,519,634	91,310,074	1,143,836,217	35,454	1,235,181,745
	Total	561,836,400	1,365,916,667	381,768	1,928,134,835	561,554,227	1,322,868,732	377,458	1,884,800,417	561,545,432	1,155,576,112	377,458	1,717,499,002

**Notes:**

- "Confirmed" projects are those that have reached or surpassed the Reservation Reserved, Confirmed Reservation, or Pending RFP status in PowerClerk and are not Delisted (i.e. not Cancelled or Withdrawn).
- "Completed or PBI - in Payment" projects are those that have reached the Completed or PBI in Payment status in PowerClerk and are not Delisted (i.e. not Cancelled or Withdrawn).
- This section represents the total amount of incentive dollars paid out to applicants. Due to payment processing administrative requirements, there may be a lag of up to 30 days from the date the incentive was paid to when it appears in this report.
- Thermal Electric projects include both electric and propane displacing systems.

**4. Capacity (MW) Breakdown between Programs**

Capacity(MW)		CSI General Market		CSI Thermal Electric <sup>12</sup>		Non-PV Technologies		Total	
		Confirmed	Under Review	Confirmed	Under Review	Confirmed	Under Review	Confirmed	Under Review
PG&E	Residential	257.401	0.000	0.255	N/A	N/A	N/A	257.656	0.000
	Non-Residential	512.021	0.000	0.025	N/A	0.633	N/A	512.679	0.000
	Total	769.422	0.000	0.280	N/A	0.633	N/A	770.335	0.000
SCE	Residential	307.901	0.000	0.082	N/A	N/A	N/A	307.983	0.000
	Non-Residential	619.714	0.068	0.007	N/A	7.106	N/A	626.827	0.068
	Total	927.615	0.068	0.089	N/A	7.106	N/A	934.810	0.068
CSE	Residential	92.994	0.000	0.143	N/A	N/A	N/A	93.137	0.000

<b>TOTAL</b>	Non-Residential	113.949	0.000	0.025	N/A	N/A	N/A	113.974	0.000
	Total	206.943	0.000	0.169	N/A	N/A	N/A	207.111	0.000
	Residential	658.296	0.000	0.481	N/A	N/A	N/A	658.776	0.000
	Non-Residential	1,245.684	0.068	0.057	N/A	7.739	N/A	1,253.480	0.068
	Total	1,903.980	0.068	0.537	N/A	7.739	N/A	1,912.256	0.068

## 5. Incentive Dollar Breakdown between Programs

Budget(\$)		CSI General Market		CSI Thermal Electric <sup>12</sup>		Non-PV Technologies		Total	
		Confirmed	Under Review	Confirmed	Under Review	Confirmed	Under Review	Confirmed	Under Review
PG&E	Residential	209,511,304	0	177,078	N/A	N/A	N/A	209,688,382	0
	Non-Residential	658,964,581	0	16,340	N/A	226,840	N/A	659,207,761	0
	Total	868,475,885	0	193,418	N/A	226,840	N/A	868,896,143	0
SCE	Residential	218,735,966	0	62,344	N/A	N/A	N/A	218,798,310	0
	Non-Residential	629,690,016	16,810	4,963	N/A	9,544,463	N/A	639,239,441	16,810
	Total	848,425,982	16,810	67,307	N/A	9,544,463	N/A	858,037,751	16,810
CSE	Residential	54,754,977	0	102,582	N/A	N/A	N/A	54,857,559	0
	Non-Residential	146,324,921	0	18,461	N/A	N/A	N/A	146,343,382	0
	Total	201,079,898	0	121,043	N/A	N/A	N/A	201,200,941	0
<b>TOTAL</b>	Residential	483,002,246	0	342,004	N/A	N/A	N/A	483,344,250	0
	Non-Residential	1,434,979,518	16,810	39,764	N/A	9,771,303	N/A	1,444,790,585	16,810
	Total	1,917,981,764	16,810	381,768	N/A	9,771,303	N/A	1,928,134,835	16,810

### Notes:

12. Thermal Electric projects include both electric and propane displacing systems.

## 6. Program Goals by Administrator, Sector, and Step

		PG&E		SCE		CSE	
Step	MW in Step	Res	Non-Res	Res	Non-Res	Res	Non-Res
1							
2	70.0	10.1	20.5	10.6	21.6	2.4	4.8
3	100.0	14.4	29.3	15.2	30.8	3.4	6.9
4	130.0	18.7	38.1	19.7	40.1	4.4	9.0
5	160.0	23.1	46.8	24.3	49.3	5.4	11.0
6	190.0	27.4	55.6	28.8	58.6	6.5	13.1
7	215.0	31.0	62.9	32.6	66.3	7.3	14.8
8	250.0	36.1	73.2	38.0	77.0	8.5	17.3
9	284.1	41.1	83.4	43.3	87.8	9.7	18.8
10	350.9	50.5	102.5	53.1	107.9	36.9	0.0
	<b>1,750.0</b>	<b>252.4</b>	<b>512.4</b>	<b>265.7</b>	<b>539.3</b>	<b>84.5</b>	<b>95.7</b>

## 7. Program Step Change Dates by Administrator, Sector, and Step

Step	PG&E		SCE		CSE	
	Res	Non-Res	Res	Non-Res	Res	Non-Res
1						
2	11/3/2006	8/29/2006	9/5/2006	8/29/2006	2/12/2007	3/8/2007
3	10/22/2007	3/1/2007	5/16/2008	3/8/2007	1/4/2008	6/25/2007
4	4/9/2008	3/27/2007	6/17/2009	6/11/2007	10/8/2008	10/29/2007
5	12/22/2008	3/17/2008	7/23/2010	3/26/2008	6/25/2009	10/23/2008
6	9/9/2009	2/25/2009	3/4/2011	5/21/2010	10/26/2009	12/14/2009
7	5/6/2010	5/19/2010	9/28/2011	7/15/2010	4/20/2010	5/24/2010

8	10/27/2010	7/15/2010	4/18/2012	2/14/2011	11/8/2010	11/16/2010
9	10/18/2011	1/14/2012	11/15/2012	4/9/2013	9/29/2011	2/6/2014
10	7/19/2012	3/12/2012	5/17/2013	6/24/2014	5/2/2012	1/19/2015

**Notes:**

13. Please note the actual step change date may vary slightly from what is shown in Table 7 due to timing of project cancelations and reservation request reviews. In accordance with CPUC decisions that provided for a transition between the SGIP and the CSI, Step 1 was fully reserved in 2006 under the Self Generation Incentive Program, which was only open to non-residential projects. The 50 MW in Step 1 were not allocated across the utilities, and were therefore reserved on a first come, first served basis. Although almost all Step 1 MW were reserved by non-residential entities, Program Administrators later reallocated Step 1 dropouts into both residential and non-residential categories. The CPUC adopted "step table" commenced in advance of the actual program launch on January 1, 2007. This is the reason why there are Step changes before the launch of the CSI program in 2006. For more information about CSI Steps, Incentive Rates, etc. please see [www.csi-trigger.com](http://www.csi-trigger.com)