

## 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 Sept. 30, 2017.

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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	512.583	659,139,442	0.000	0	16.146	<a href="#">7,025,528</a>	528.729	10	148.636
	Total	764.750	877,792,970	770.239	868,827,823	0.000	0	25.824	<a href="#">8,965,147</a>	796.064	N/A	N/A
SCE	Residential	265.650	222,767,000	307.966	218,794,572	0.000	0	19.819	<a href="#">3,972,428</a>	327.785	10	159.095
	Non-Residential	539.350	645,225,600	622.698	635,890,844	0.046	9,110	25.639	<a href="#">9,325,646</a>	648.382	10	328.202
	Total	805.000	867,992,600	930.665	854,685,416	0.046	9,110	45.457	<a href="#">13,298,074</a>	976.168	N/A	N/A
CSE	Residential	84.507	54,885,000	93.052	54,840,517	0.000	0	0.222	<a href="#">44,483</a>	93.274	10	57.216
	Non-Residential	95.743	147,139,430	111.198	145,714,883	0.000	0	3.824	<a href="#">1,424,547</a>	115.022	10	31.309
	Total	180.250	202,024,430	204.250	200,555,399	0.000	0	4.046	<a href="#">1,469,031</a>	208.296	N/A	N/A
TOTAL	Residential	<b>602.525</b>	<b>489,280,000</b>	<b>658.675</b>	<b>483,323,470</b>	<b>0.000</b>	<b>0</b>	<b>29.719</b>	<b>5,956,530</b>	<b>688.394</b>	<b>N/A</b>	<b>N/A</b>
	Non-Residential	<b>1,147.475</b>	<b>1,458,530,000</b>	<b>1,246.479</b>	<b>1,440,745,168</b>	<b>0.046</b>	<b>9,110</b>	<b>45.608</b>	<b>17,775,722</b>	<b>1,292.133</b>	<b>N/A</b>	<b>N/A</b>
	Total	<b>1,750.000</b>	<b>1,947,810,000</b>	<b>1,905.154</b>	<b>1,924,068,638</b>	<b>0.046</b>	<b>9,110</b>	<b>75.327</b>	<b>23,732,252</b>	<b>1,980.527</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	616,704,211	659,139,442	0	0	<a href="#">7,025,528</a>	0	659,045,746	7,119,224
	Total	877,792,970	826,122,003	868,827,823	0	0	<a href="#">8,965,147</a>	0	867,683,945	10,109,025
SCE	Residential	222,767,000	218,412,256	218,794,572	0	0	<a href="#">3,972,428</a>	0	210,385,101	12,381,899
	Non-Residential	645,225,600	601,781,373	635,890,844	9,110	9,110	<a href="#">9,325,646</a>	0	611,350,333	33,875,267
	Total	867,992,600	820,193,628	854,685,416	9,110	9,110	<a href="#">13,298,074</a>	0	821,735,434	46,257,166
CSE	Residential	54,885,000	54,688,774	54,840,517	0	0	<a href="#">44,483</a>	0	53,134,115	1,750,885
	Non-Residential	147,139,430	135,459,838	145,714,883	0	0	<a href="#">1,424,547</a>	0	140,054,632	7,084,798
	Total	202,024,430	190,148,612	200,555,399	0	0	<a href="#">1,469,031</a>	0	193,188,747	8,835,683
TOTAL	Residential	<b>489,280,000</b>	<b>482,518,822</b>	<b>483,323,470</b>	<b>0</b>	<b>0</b>	<b>5,956,530</b>	<b>0</b>	<b>472,157,415</b>	<b>17,122,585</b>
	Non-Residential	<b>1,458,530,000</b>	<b>1,353,945,422</b>	<b>1,440,745,168</b>	<b>9,110</b>	<b>9,110</b>	<b>17,775,722</b>	<b>0</b>	<b>1,410,450,711</b>	<b>48,079,289</b>

	<b>Total</b>	<b>1,947,810,000</b>	<b>1,836,464,244</b>	<b>1,924,068,638</b>	<b>9,110</b>	<b>9,110</b>	<b>23,732,252</b>	<b>0</b>	<b>1,882,608,126</b>	<b>65,201,874</b>
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**Notes:**

1. "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.
2. "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.
3. "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.
4. "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.
5. 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.
6. "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.
7. 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	3,800,360	177,078	209,608,258
	Non Res	50,884,794	608,238,308	16,340	659,139,442	50,884,794	608,161,831	16,340	659,062,965	50,884,597	577,501,886	16,340	628,402,823
	Total	256,517,648	612,116,757	193,418	868,827,823	256,517,648	612,040,281	193,418	868,751,347	256,515,417	581,302,247	193,418	838,011,081
SCE	Res	211,977,978	6,754,250	62,344	218,794,572	211,961,568	6,754,250	62,344	218,778,162	211,941,404	6,044,492	62,344	218,048,240
	Non Res	33,285,226	602,600,655	4,963	635,890,844	33,213,006	572,073,053	653	605,286,712	33,226,606	463,959,823	653	497,187,082
	Total	245,263,204	609,354,905	67,307	854,685,416	245,174,574	578,827,303	62,997	824,064,874	245,168,010	470,004,316	62,997	715,235,322
CSE	Res	52,689,412	2,048,523	102,582	54,840,517	52,676,738	2,048,523	102,582	54,827,843	52,676,738	1,935,241	102,582	54,714,561
	Non Res	7,253,319	138,443,103	18,461	145,714,883	7,253,319	137,258,370	18,461	144,530,150	7,253,319	113,914,454	18,461	121,186,234
	Total	59,942,730	140,491,626	121,043	200,555,399	59,930,056	139,306,893	121,043	199,357,992	59,930,056	115,849,695	121,043	175,900,795
TOTAL	Res	470,300,244	12,681,222	342,004	483,323,470	470,271,160	12,681,222	342,004	483,294,386	470,248,961	11,780,093	342,004	482,371,059
	Non Res	91,423,338	1,349,282,066	39,764	1,440,745,168	91,351,118	1,317,493,255	35,454	1,408,879,827	91,364,522	1,155,376,164	35,454	1,246,776,140
	Total	561,723,582	1,361,963,288	381,768	1,924,068,638	561,622,278	1,330,174,477	377,458	1,892,174,213	561,613,483	1,167,156,257	377,458	1,729,147,198

**Notes:**

8. "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).
9. "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).
10. 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.
11. 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	511.925	0.000	0.025	N/A	0.633	N/A	512.583	0.000
	Total	769.326	0.000	0.280	N/A	0.633	N/A	770.239	0.000
SCE	Residential	307.884	0.000	0.082	N/A	N/A	N/A	307.966	0.000
	Non-Residential	615.586	0.046	0.007	N/A	7.106	N/A	622.698	0.046
	Total	923.470	0.046	0.089	N/A	7.106	N/A	930.665	0.046
CSE	Residential	92.909	0.000	0.143	N/A	N/A	N/A	93.052	0.000

<b>TOTAL</b>	Non-Residential	111.173	0.000	0.025	N/A	N/A	N/A	111.198	0.000
	Total	204.081	0.000	0.169	N/A	N/A	N/A	204.250	0.000
	Residential	658.194	0.000	0.481	N/A	N/A	N/A	658.675	0.000
	Non-Residential	1,238.684	0.046	0.057	N/A	7.739	N/A	1,246.479	0.046
	Total	1,896.878	0.046	0.537	N/A	7.739	N/A	1,905.154	0.046

## 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	658,896,262	0	16,340	N/A	226,840	N/A	659,139,442	0
	Total	868,407,565	0	193,418	N/A	226,840	N/A	868,827,823	0
SCE	Residential	218,732,228	0	62,344	N/A	N/A	N/A	218,794,572	0
	Non-Residential	626,341,418	9,110	4,963	N/A	9,544,463	N/A	635,890,844	9,110
	Total	845,073,646	9,110	67,307	N/A	9,544,463	N/A	854,685,416	9,110
CSE	Residential	54,737,935	0	102,582	N/A	N/A	N/A	54,840,517	0
	Non-Residential	145,696,422	0	18,461	N/A	N/A	N/A	145,714,883	0
	Total	200,434,356	0	121,043	N/A	N/A	N/A	200,555,399	0
<b>TOTAL</b>	Residential	482,981,466	0	342,004	N/A	N/A	N/A	483,323,470	0
	Non-Residential	1,430,934,101	9,110	39,764	N/A	9,771,303	N/A	1,440,745,168	9,110
	Total	1,913,915,568	9,110	381,768	N/A	9,771,303	N/A	1,924,068,638	9,110

### 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
	1,750.0	252.4	512.4	265.7	539.3	84.5	95.7

## 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)