

## 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, 2016.

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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	515.077	659,594,014	0.000	0	15.118	<a href="#">6,570,956</a>	530.195	10	150.102
	Total	764.750	877,792,970	772.733	869,282,396	0.000	0	24.796	<b>8,510,574</b>	797.529	N/A	N/A
SCE	Residential	265.650	222,767,000	308.408	218,884,297	0.000	0	19.373	<a href="#">3,882,703</a>	327.780	10	159.570
	Non-Residential	539.350	645,225,600	626.909	639,536,978	9.680	2,246,147	9.490	<a href="#">3,442,475</a>	646.078	10	322.428
	Total	805.000	867,992,600	935.317	858,421,275	9.680	2,246,147	28.862	<b>7,325,178</b>	973.859	N/A	N/A
CSE	Residential	84.507	54,885,000	93.157	54,872,109	0.057	11,317	0.008	<a href="#">1,574</a>	93.221	10	57.034
	Non-Residential	95.743	147,139,430	116.234	146,986,435	0.401	94,941	0.156	<a href="#">58,054</a>	116.791	10	32.979
	Total	180.250	202,024,430	209.390	201,858,544	0.458	106,258	0.164	<b>59,629</b>	210.013	N/A	N/A
TOTAL	Residential	<b>602.525</b>	<b>489,280,000</b>	<b>659.221</b>	<b>483,444,787</b>	<b>0.057</b>	<b>11,317</b>	<b>29.059</b>	<b>5,823,896</b>	<b>688.336</b>	<b>N/A</b>	<b>N/A</b>
	Non-Residential	<b>1,147.475</b>	<b>1,458,530,000</b>	<b>1,258.220</b>	<b>1,446,117,427</b>	<b>10.081</b>	<b>2,341,088</b>	<b>24.764</b>	<b>10,071,485</b>	<b>1,293.064</b>	<b>N/A</b>	<b>N/A</b>
	Total	<b>1,750.000</b>	<b>1,947,810,000</b>	<b>1,917.440</b>	<b>1,929,562,214</b>	<b>10.138</b>	<b>2,352,405</b>	<b>53.823</b>	<b>15,895,381</b>	<b>1,981.401</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>5</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	208,637,373	2,990,627
	Non-Residential	666,164,970	617,128,625	659,594,014	0	0	<a href="#">6,570,956</a>	0	658,959,990	7,204,980
	Total	877,792,970	826,546,417	869,282,396	0	0	<b>8,510,574</b>	0	867,597,362	10,195,608
SCE	Residential	222,767,000	218,503,438	218,884,297	0	0	<a href="#">3,882,703</a>	0	210,385,836	12,381,164
	Non-Residential	645,225,600	605,255,873	639,536,978	2,119,484	2,246,147	<a href="#">3,442,475</a>	0	613,710,539	31,515,061
	Total	867,992,600	823,759,310	858,421,275	2,119,484	2,246,147	<b>7,325,178</b>	0	824,096,375	43,896,225
CSE	Residential	54,885,000	54,715,316	54,872,109	11,317	11,317	<a href="#">1,574</a>	0	53,133,818	1,751,182
	Non-Residential	147,139,430	136,634,819	146,986,435	87,908	94,941	<a href="#">58,054</a>	0	140,311,701	6,827,729
	Total	202,024,430	191,350,135	201,858,544	99,225	106,258	<b>59,629</b>	0	193,445,519	8,578,911
TOTAL	Residential	<b>489,280,000</b>	<b>482,636,546</b>	<b>483,444,787</b>	<b>11,317</b>	<b>11,317</b>	<b>5,823,896</b>	<b>0</b>	<b>472,157,027</b>	<b>17,122,973</b>
	Non-Residential	<b>1,458,530,000</b>	<b>1,359,019,317</b>	<b>1,446,117,427</b>	<b>2,207,392</b>	<b>2,341,088</b>	<b>10,071,485</b>	<b>0</b>	<b>1,412,982,230</b>	<b>45,547,770</b>

	<b>Total</b>	<b>1,947,810,000</b>	<b>1,841,655,863</b>	<b>1,929,562,214</b>	<b>2,218,709</b>	<b>2,352,405</b>	<b>15,895,381</b>	<b>0</b>	<b>1,885,139,257</b>	<b>62,670,743</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	205,628,987	3,605,703	177,078	209,411,768
	Non Res	50,907,098	608,670,576	16,340	659,594,014	50,882,610	606,386,071	16,340	657,285,021	50,882,413	503,987,536	16,340	554,886,289
	Total	256,539,952	612,549,026	193,418	869,282,396	256,515,464	610,264,520	193,418	866,973,402	256,511,400	507,593,239	193,418	764,298,057
SCE	Res	212,093,442	6,728,511	62,344	218,884,297	211,957,830	6,722,163	62,344	218,742,337	211,937,666	5,730,573	62,344	217,730,582
	Non Res	33,899,153	605,632,862	4,963	639,536,978	33,081,370	543,570,024	653	576,652,047	33,094,970	414,341,552	653	447,437,175
	Total	245,992,595	612,361,373	67,307	858,421,275	245,039,200	550,292,187	62,997	795,394,384	245,032,636	420,072,124	62,997	665,167,757
CSE	Res	52,652,828	2,116,699	102,582	54,872,109	52,571,218	2,116,699	102,582	54,790,499	52,571,218	1,913,859	102,582	54,587,659
	Non Res	7,221,160	139,746,814	18,461	146,986,435	7,200,491	132,340,196	18,461	139,559,148	7,200,491	106,231,921	18,461	113,450,872
	Total	59,873,987	141,863,513	121,043	201,858,544	59,771,708	134,456,895	121,043	194,349,646	59,771,708	108,145,779	121,043	168,038,531
TOTAL	Res	470,379,124	12,723,659	342,004	483,444,787	470,161,902	12,717,311	342,004	483,221,217	470,137,870	11,250,135	342,004	481,730,009
	Non Res	92,027,410	1,354,050,253	39,764	1,446,117,427	91,164,470	1,282,296,291	35,454	1,373,496,216	91,177,874	1,024,561,008	35,454	1,115,774,336
	Total	562,406,534	1,366,773,912	381,768	1,929,562,214	561,326,372	1,295,013,602	377,458	1,856,717,433	561,315,744	1,035,811,143	377,458	1,597,504,345

**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	514.419	0.000	0.025	N/A	0.633	N/A	515.077	0.000
	Total	771.820	0.000	0.280	N/A	0.633	N/A	772.733	0.000
SCE	Residential	308.326	0.000	0.082	N/A	N/A	N/A	308.408	0.000
	Non-Residential	619.797	9.680	0.007	N/A	7.106	N/A	626.909	9.680
	Total	928.122	9.680	0.089	N/A	7.106	N/A	935.317	9.680
CSE	Residential	93.013	0.057	0.143	N/A	N/A	N/A	93.157	0.057

<b>TOTAL</b>	Non-Residential	116.209	0.401	0.025	N/A	N/A	N/A	116.234	0.401
	Total	209.222	0.458	0.169	N/A	N/A	N/A	209.390	0.458
	Residential	658.740	0.057	0.481	N/A	N/A	N/A	659.221	0.057
	Non-Residential	1,250.424	10.081	0.057	N/A	7.739	N/A	1,258.220	10.081
	Total	1,909.164	10.138	0.537	N/A	7.739	N/A	1,917.440	10.138

## 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	659,350,834	0	16,340	N/A	226,840	N/A	659,594,014	0
	Total	868,862,137	0	193,418	N/A	226,840	N/A	869,282,396	0
SCE	Residential	218,821,953	0	62,344	N/A	N/A	N/A	218,884,297	0
	Non-Residential	629,987,552	2,246,147	4,963	N/A	9,544,463	N/A	639,536,978	2,246,147
	Total	848,809,505	2,246,147	67,307	N/A	9,544,463	N/A	858,421,275	2,246,147
CSE	Residential	54,769,527	11,317	102,582	N/A	N/A	N/A	54,872,109	11,317
	Non-Residential	146,967,974	94,941	18,461	N/A	N/A	N/A	146,986,435	94,941
	Total	201,737,501	106,258	121,043	N/A	N/A	N/A	201,858,544	106,258
<b>TOTAL</b>	Residential	483,102,783	11,317	342,004	N/A	N/A	N/A	483,444,787	11,317
	Non-Residential	1,436,306,360	2,341,088	39,764	N/A	9,771,303	N/A	1,446,117,427	2,341,088
	Total	1,919,409,143	2,352,405	381,768	N/A	9,771,303	N/A	1,929,562,214	2,352,405

### 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	77.1	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

		PG&E		SCE		CSE	
Step		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)