

## 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, 2015.

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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	257.754	209,707,997	0.000	0	9.581	<a href="#">1,920,004</a>	267.335	10	83.027
	Non-Residential	512.383	666,164,970	517.947	661,472,064	0.000	0	10.772	<a href="#">4,692,906</a>	528.719	10	148.626
	Total	764.750	877,792,970	775.702	871,180,061	0.000	0	20.352	<b>6,612,909</b>	796.054	N/A	N/A
SCE	Residential	265.650	222,767,000	312.161	219,650,719	0.000	0	15.545	<a href="#">3,116,281</a>	327.706	10	163.276
	Non-Residential	539.350	645,225,600	585.047	635,374,649	15.526	5,384,581	11.546	<a href="#">4,466,369</a>	612.119	10	230.899
	Total	805.000	867,992,600	897.208	855,025,368	15.526	5,384,581	27.091	<b>7,582,651</b>	939.825	N/A	N/A
CSE	Residential	84.507	54,885,000	93.147	54,876,344	0.020	3,978	0.023	<a href="#">4,678</a>	93.190	10	56.392
	Non-Residential	95.743	147,139,430	114.279	146,397,720	0.000	0	2.018	<a href="#">741,710</a>	116.297	10	30.805
	Total	180.250	202,024,430	207.426	201,274,064	0.020	3,978	2.041	<b>746,388</b>	209.487	N/A	N/A
TOTAL	Residential	<b>602.525</b>	<b>489,280,000</b>	<b>663.062</b>	<b>484,235,059</b>	<b>0.020</b>	<b>3,978</b>	<b>25.149</b>	<b>5,040,963</b>	<b>688.231</b>	<b>N/A</b>	<b>N/A</b>
	Non-Residential	<b>1,147.475</b>	<b>1,458,530,000</b>	<b>1,217.273</b>	<b>1,443,244,434</b>	<b>15.526</b>	<b>5,384,581</b>	<b>24.335</b>	<b>9,900,985</b>	<b>1,257.134</b>	<b>N/A</b>	<b>N/A</b>
	Total	<b>1,750.000</b>	<b>1,947,810,000</b>	<b>1,880.335</b>	<b>1,927,479,493</b>	<b>15.546</b>	<b>5,388,559</b>	<b>49.484</b>	<b>14,941,948</b>	<b>1,945.365</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	209,437,407	209,707,997	0	0	<a href="#">1,920,004</a>	0	208,638,040	2,989,960
	Non-Residential	666,164,970	618,875,417	661,472,064	0	0	<a href="#">4,692,906</a>	0	659,623,570	6,541,400
	Total	877,792,970	828,312,824	871,180,061	0	0	<b>6,612,909</b>	0	868,261,610	9,531,360
SCE	Residential	222,767,000	219,263,253	219,650,719	0	0	<a href="#">3,116,281</a>	0	210,387,551	12,379,449
	Non-Residential	645,225,600	601,297,729	635,374,649	5,122,746	5,384,581	<a href="#">4,466,369</a>	0	619,720,053	25,505,547
	Total	867,992,600	820,560,981	855,025,368	5,122,746	5,384,581	<b>7,582,651</b>	0	830,107,604	37,884,996
CSE	Residential	54,885,000	54,718,851	54,876,344	3,978	3,978	<a href="#">4,678</a>	0	53,136,095	1,748,905
	Non-Residential	147,139,430	136,087,532	146,397,720	0	0	<a href="#">741,710</a>	0	140,232,776	6,906,654
	Total	202,024,430	190,806,383	201,274,064	3,978	3,978	<b>746,388</b>	0	193,368,871	8,655,559
TOTAL	Residential	<b>489,280,000</b>	<b>483,419,511</b>	<b>484,235,059</b>	<b>3,978</b>	<b>3,978</b>	<b>5,040,963</b>	<b>0</b>	<b>472,161,686</b>	<b>17,118,314</b>
	Non-Residential	<b>1,458,530,000</b>	<b>1,356,260,678</b>	<b>1,443,244,434</b>	<b>5,122,746</b>	<b>5,384,581</b>	<b>9,900,985</b>	<b>0</b>	<b>1,419,576,400</b>	<b>38,953,600</b>

	<b>Total</b>	<b>1,947,810,000</b>	<b>1,839,680,189</b>	<b>1,927,479,493</b>	<b>5,126,724</b>	<b>5,388,559</b>	<b>14,941,948</b>	<b>0</b>	<b>1,891,738,086</b>	<b>56,071,914</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	205,652,469	3,878,450	177,078	209,707,997	205,652,469	3,878,450	177,078	209,707,997	205,630,136	3,458,646	177,078	209,265,860
	Non Res	50,903,782	610,551,942	16,340	661,472,064	50,868,023	594,265,515	16,340	645,149,878	50,867,826	443,691,929	16,340	494,576,095
	Total	256,556,251	614,430,392	193,418	871,180,061	256,520,492	598,143,964	193,418	854,857,874	256,497,962	447,150,575	193,418	703,841,955
SCE	Res	212,743,149	6,845,225	62,344	219,650,719	211,872,681	6,708,647	62,344	218,643,672	211,846,161	5,348,929	62,344	217,257,434
	Non Res	33,344,084	602,025,603	4,963	635,374,649	32,709,474	516,810,745	653	549,520,872	32,723,074	357,984,143	653	390,707,871
	Total	246,087,233	608,870,828	67,307	855,025,368	244,582,155	523,519,392	62,997	768,164,544	244,569,235	363,333,073	62,997	607,965,304
CSE	Res	52,647,611	2,126,151	102,582	54,876,344	51,913,431	1,946,404	102,582	53,962,417	51,913,431	1,832,461	102,582	53,848,474
	Non Res	7,191,718	139,187,542	18,461	146,397,720	6,905,315	127,091,835	12,880	134,010,029	6,905,315	93,281,914	12,880	100,200,108
	Total	59,839,328	141,313,693	121,043	201,274,064	58,818,745	129,038,239	115,462	187,972,446	58,818,745	95,114,375	115,462	154,048,583
TOTAL	Res	471,043,229	12,849,826	342,004	484,235,059	469,438,581	12,533,500	342,004	482,314,085	469,389,727	10,640,037	342,004	480,371,768
	Non Res	91,439,583	1,351,765,087	39,764	1,443,244,434	90,482,811	1,238,168,094	29,873	1,328,680,779	90,496,215	894,957,986	29,873	985,484,074
	Total	562,482,812	1,364,614,913	381,768	1,927,479,493	559,921,392	1,250,701,595	371,877	1,810,994,864	559,885,942	905,598,023	371,877	1,465,855,842

**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	257.499	0.000	0.255	N/A	N/A	N/A	257.754	0.000
	Non-Residential	517.289	0.000	0.025	N/A	0.633	N/A	517.947	0.000
	Total	774.788	0.000	0.280	N/A	0.633	N/A	775.702	0.000
SCE	Residential	312.079	0.000	0.082	N/A	N/A	N/A	312.161	0.000
	Non-Residential	577.934	15.526	0.007	N/A	7.106	N/A	585.047	15.526
	Total	890.013	15.526	0.089	N/A	7.106	N/A	897.208	15.526
CSE	Residential	93.003	0.020	0.143	N/A	N/A	N/A	93.147	0.020

<b>TOTAL</b>	Non-Residential	114.254	0.000	0.025	N/A	N/A	N/A	114.279	0.000
	Total	207.258	0.020	0.169	N/A	N/A	N/A	207.426	0.020
	Residential	662.582	0.020	0.481	N/A	N/A	N/A	663.062	0.020
	Non-Residential	1,209.477	15.526	0.057	N/A	7.739	N/A	1,217.273	15.526
	Total	1,872.059	15.546	0.537	N/A	7.739	N/A	1,880.335	15.546

## 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	209,530,919	0	177,078	N/A	N/A	N/A	209,707,997	0
	Non-Residential	661,228,884	0	16,340	N/A	226,840	N/A	661,472,064	0
	Total	870,759,803	0	193,418	N/A	226,840	N/A	871,180,061	0
SCE	Residential	219,588,375	0	62,344	N/A	N/A	N/A	219,650,719	0
	Non-Residential	625,825,224	5,384,581	4,963	N/A	9,544,463	N/A	635,374,649	5,384,581
	Total	845,413,598	5,384,581	67,307	N/A	9,544,463	N/A	855,025,368	5,384,581
CSE	Residential	54,773,762	3,978	102,582	N/A	N/A	N/A	54,876,344	3,978
	Non-Residential	146,379,259	0	18,461	N/A	N/A	N/A	146,397,720	0
	Total	201,153,021	3,978	121,043	N/A	N/A	N/A	201,274,064	3,978
<b>TOTAL</b>	Residential	483,893,055	3,978	342,004	N/A	N/A	N/A	484,235,059	3,978
	Non-Residential	1,433,433,367	5,384,581	39,764	N/A	9,771,303	N/A	1,443,244,434	5,384,581
	Total	1,917,326,422	5,388,559	381,768	N/A	9,771,303	N/A	1,927,479,493	5,388,559

### 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)