

## 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 March 31, 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	514.182	659,550,932	0.000	0	15.218	<a href="#">6,614,038</a>	529.400	10	149.308
	Total	764.750	877,792,970	771.838	869,239,313	0.000	0	24.897	<b>8,553,657</b>	796.735	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	629.235	639,691,194	0.688	160,737	14.840	<a href="#">5,373,669</a>	644.763	10	324.583
	Total	805.000	867,992,600	937.218	858,489,504	0.688	160,737	34.641	<b>9,342,359</b>	972.546	N/A	N/A
CSE	Residential	84.507	54,885,000	93.232	54,876,438	0.000	0	0.043	<a href="#">8,562</a>	93.274	10	57.217
	Non-Residential	95.743	147,139,430	114.057	146,366,804	0.000	0	2.093	<a href="#">772,626</a>	116.151	10	32.438
	Total	180.250	202,024,430	207.289	201,243,241	0.000	0	2.136	<b>781,189</b>	209.425	N/A	N/A
TOTAL	Residential	<b>602.525</b>	<b>489,280,000</b>	<b>658.871</b>	<b>483,363,129</b>	<b>0.000</b>	<b>0</b>	<b>29.521</b>	<b>5,916,871</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>1,257.474</b>	<b>1,445,608,929</b>	<b>0.688</b>	<b>160,737</b>	<b>32.152</b>	<b>12,760,334</b>	<b>1,290.314</b>	<b>N/A</b>	<b>N/A</b>
	Total	<b>1,750.000</b>	<b>1,947,810,000</b>	<b>1,916.345</b>	<b>1,928,972,058</b>	<b>0.688</b>	<b>160,737</b>	<b>61.673</b>	<b>18,677,205</b>	<b>1,978.706</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	617,087,429	659,550,932	0	0	<a href="#">6,614,038</a>	0	659,283,067	6,881,903
	Total	877,792,970	826,505,221	869,239,313	0	0	<b>8,553,657</b>	0	867,921,266	9,871,704
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	605,371,791	639,691,194	152,590	160,737	<a href="#">5,373,669</a>	0	613,580,978	31,644,622
	Total	867,992,600	823,787,784	858,489,504	152,590	160,737	<b>9,342,359</b>	0	823,967,031	44,025,569
CSE	Residential	54,885,000	54,724,695	54,876,438	0	0	<a href="#">8,562</a>	0	53,134,115	1,750,885
	Non-Residential	147,139,430	136,062,371	146,366,804	0	0	<a href="#">772,626</a>	0	140,085,102	7,054,328
	Total	202,024,430	190,787,066	201,243,241	0	0	<b>781,189</b>	0	193,219,217	8,805,213
TOTAL	Residential	<b>489,280,000</b>	<b>482,558,481</b>	<b>483,363,129</b>	<b>0</b>	<b>0</b>	<b>5,916,871</b>	<b>0</b>	<b>472,158,367</b>	<b>17,121,633</b>
	Non-Residential	<b>1,458,530,000</b>	<b>1,358,521,591</b>	<b>1,445,608,929</b>	<b>152,590</b>	<b>160,737</b>	<b>12,760,334</b>	<b>0</b>	<b>1,412,949,147</b>	<b>45,580,853</b>

	<b>Total</b>	<b>1,947,810,000</b>	<b>1,841,080,072</b>	<b>1,928,972,058</b>	<b>152,590</b>	<b>160,737</b>	<b>18,677,205</b>	<b>0</b>	<b>1,885,107,514</b>	<b>62,702,486</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	3,793,017	177,078	209,600,915
	Non Res	50,891,055	608,643,537	16,340	659,550,932	50,884,794	606,682,364	16,340	657,583,498	50,884,597	568,803,540	16,340	619,704,477
	Total	256,523,909	612,521,986	193,418	869,239,313	256,517,648	610,560,813	193,418	867,271,879	256,515,417	572,596,557	193,418	829,305,392
SCE	Res	211,981,716	6,754,250	62,344	218,798,310	211,961,568	6,722,163	62,344	218,746,075	211,941,404	5,963,266	62,344	217,967,014
	Non Res	33,376,765	606,309,467	4,963	639,691,194	33,187,145	558,562,941	653	591,750,739	33,200,745	451,595,268	653	484,796,666
	Total	245,358,481	613,063,716	67,307	858,489,504	245,148,713	565,285,104	62,997	810,496,814	245,142,149	457,558,534	62,997	702,763,680
CSE	Res	52,725,333	2,048,523	102,582	54,876,438	52,663,135	2,048,523	102,582	54,814,240	52,663,135	1,933,861	102,582	54,699,578
	Non Res	7,238,505	139,109,838	18,461	146,366,804	7,224,732	136,126,316	18,461	143,369,509	7,224,732	112,992,909	18,461	120,236,102
	Total	59,963,837	141,158,361	121,043	201,243,241	59,887,866	138,174,839	121,043	198,183,748	59,887,866	114,926,771	121,043	174,935,680
TOTAL	Res	470,339,903	12,681,222	342,004	483,363,129	470,257,557	12,649,135	342,004	483,248,696	470,235,358	11,690,145	342,004	482,267,507
	Non Res	91,506,324	1,354,062,841	39,764	1,445,608,929	91,296,670	1,301,371,621	35,454	1,392,703,745	91,310,074	1,133,391,717	35,454	1,224,737,245
	Total	561,846,227	1,366,744,063	381,768	1,928,972,058	561,554,227	1,314,020,756	377,458	1,875,952,441	561,545,432	1,145,081,862	377,458	1,707,004,752

**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	513.524	0.000	0.025	N/A	0.633	N/A	514.182	0.000
	Total	770.925	0.000	0.280	N/A	0.633	N/A	771.838	0.000
SCE	Residential	307.901	0.000	0.082	N/A	N/A	N/A	307.983	0.000
	Non-Residential	622.122	0.688	0.007	N/A	7.106	N/A	629.235	0.688
	Total	930.023	0.688	0.089	N/A	7.106	N/A	937.218	0.688
CSE	Residential	93.088	0.000	0.143	N/A	N/A	N/A	93.232	0.000

<b>TOTAL</b>	Non-Residential	114.032	0.000	0.025	N/A	N/A	N/A	114.057	0.000
	Total	207.121	0.000	0.169	N/A	N/A	N/A	207.289	0.000
	Residential	658.390	0.000	0.481	N/A	N/A	N/A	658.871	0.000
	Non-Residential	1,249.678	0.688	0.057	N/A	7.739	N/A	1,257.474	0.688
	Total	1,908.069	0.688	0.537	N/A	7.739	N/A	1,916.345	0.688

## 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	659,307,752	0	16,340	N/A	226,840	N/A	659,550,932	0
	Total	868,819,055	0	193,418	N/A	226,840	N/A	869,239,313	0
SCE	Residential	218,735,966	0	62,344	N/A	N/A	N/A	218,798,310	0
	Non-Residential	630,141,769	160,737	4,963	N/A	9,544,463	N/A	639,691,194	160,737
	Total	848,877,735	160,737	67,307	N/A	9,544,463	N/A	858,489,504	160,737
CSE	Residential	54,773,856	0	102,582	N/A	N/A	N/A	54,876,438	0
	Non-Residential	146,348,343	0	18,461	N/A	N/A	N/A	146,366,804	0
	Total	201,122,198	0	121,043	N/A	N/A	N/A	201,243,241	0
<b>TOTAL</b>	Residential	483,021,125	0	342,004	N/A	N/A	N/A	483,363,129	0
	Non-Residential	1,435,797,863	160,737	39,764	N/A	9,771,303	N/A	1,445,608,929	160,737
	Total	1,918,818,988	160,737	381,768	N/A	9,771,303	N/A	1,928,972,058	160,737

### 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

		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)