

**REGULATORY UPDATE FOR SEPTEMBER 10, 2025
(WEEK OF SEPTEMBER 1, 2025)**

CALIFORNIA PUBLIC UTILITIES COMMISSION (CPUC OR COMMISSION)¹

Proposed Decisions and Resolutions

Resolution (Res) E-5416 (Revisions to Pacific Gas and Electric's Bundled Procurement Plan). This Resolution approves Pacific Gas and Electric's (PG&E) request to revise its Bundled Procurement Plan Appendix S Sales Framework to update PG&E's methodology for determining Resource Adequacy (RA) capacity volumes to make available for sale. PG&E states that it is proposing these revisions to Appendix S to address ongoing substitution capacity obligations under the current CAISO program structure that requires all RA resources to obtain substitution capacity approval before a planned outage.

Res E-5415 (Bear Valley Electric Service Recovery of Costs). This Resolution authorizes Bear Valley Electric Service (Bear Valley) to recover all costs of the Morgan Stanley Confirmation for the Energy Product. Morgan Stanley was selected through Bear Valley's May 2023 Request for Proposals to approximately 150 potential suppliers, seeking a firm Energy Product to cover about half of its energy needs. The Commission, in Decision (D.) 25-04-026, approved Bear Valley's method of establishing a benchmark price, preapproved forms of Confirmations associated with certain power purchase agreements (PPAs), and preapproved Energy Product Confirmations, including one with Morgan Stanley. D.25-04-026 required that the PPAs be approved via a Tier 1 Advice Letter, unless the price exceeded the confidential Applicable Benchmark Price, in which case approval would be via a Tier 3 Advice Letter. The winning bid with Morgan Stanley for the Energy Product exceeded the confidential Benchmark Price, and thus Bear Valley was required to submit a Tier 3 Advice Letter.

Voting Meeting

The CPUC will hold a voting meeting in San Francisco, California on September 18, 2025, at 11:00 a.m. PT. The following are energy-related items on the [agenda](#):

Item 2. Res G-3605 (SoCalGas's 2024 Compliance Plan, Forecasts, and Caps for Its Natural Gas Leak Abatement Program). This Resolution approves in part and denies in part SoCalGas's 2024 Natural Gas Leak Abatement (NGLA) Compliance Plan and the ratemaking forecasts as presented in AL 6277-G-B. SoCalGas requested a forecasted total revenue requirement of \$483.12 million. This Resolution approves \$102 million for Blowdown Reduction Activities, as it is the sole cost-effective measure in the program. All other costs for Best Practices and Research Development & Demonstration are denied. An additional \$4.245

¹ Per the CPUC's Rules of Practice and Procedure Rule 14.3, comments on proposed decisions are due 20 days after issuance of the proposed decision, and reply comments are due five days thereafter. Comments on draft resolutions are due 20 days after the draft resolution appears in the CPUC's daily calendar, per Rule 14.5.

million for SoCalGas's NGLA Program Administration is authorized for recording in the NGLA Program Memorandum Account for potential recovery in a future general rate case (GRC) or other proceeding, where it will be subject to reasonableness review. The Resolution approves \$78.8 million for ongoing capital undercollections from previously approved Compliance Plans.

Item 3. Res G-3606 (San Diego Gas & Electric (SDG&E) 2024 NGLA Ratemaking Forecasts and Capital Costs Recovery). This Resolution denies SDG&E's 2024 NGLA ratemaking forecasts as presented in AL 3285-G-A for costs for its 2024 Compliance Plan. SDG&E forecasts a total revenue requirement of \$24.859 million in AL 3285-G-A: \$22.919 million for Best Practices; \$1.29 million for Research, Development, and Demonstration (RD&D) projects; \$0.428 million for Program Administration; and \$0.222 million for unrecovered ongoing capital revenue requirement. Best Practice proposals are described in Attachment A, the Safety Policy Division's Review of SDG&E's 2024 NGLA Compliance Plan. This Resolution approves no funding for Best Practices because none of the practices are cost-effective. Costs for RD&D are also denied. SDG&E is authorized to record up to \$0.428 million for NGLA Program Administration, if applicable, in the NGLA Program Memorandum Account for potential recovery in a future GRC or other proceeding, where it will be subject to reasonableness review. The Resolution approves \$222,000 for unrecovered ongoing capital costs from previously approved Compliance Plans.

Item 8. Res ALJ-482 (Appeal by Silicon Valley Clean Energy Authority of Citation No. E-4195-0143). This Resolution resolves Silicon Valley Clean Energy Authority's appeal of Citation Number E-4195-0143 issued by the Commission's Consumer Protection and Enforcement Division. Citation E-4195-0143 cites and fines Silicon Valley Clean Energy Authority for failing to procure certain of its June, July, August, and September 2023 Year-Ahead System RA requirements and for failing to file its Year-Ahead System RA compliance filing at the time and in the manner required. This Resolution denies the appeal.

Item 10. Application (A.)23-01-008 (Application of SDG&E for Authority to Update Marginal Costs, Cost Allocation, and Electric Rate Design). This decision addresses the 2024 GRC Phase 2 proceeding of SDG&E. This decision adopts three settlement agreements: (1) the Partial Settlement Agreement, which resolves cost allocation, creation of a Medium Commercial Class, base time-of-use rates, and most of the other contested issues in this proceeding; (2) the Marginal Cost Settlement Agreement that includes proposals to set marginal costs used in cost allocation and rate design; and (3) the Medical Baseline Settlement Agreement that provides for a line-item medical baseline discount. This decision also adopts the system percentage of change methodology to update rates, resolves other bill presentment issues that were raised by parties, and approves SDG&E's other uncontested proposals.

Item 11. Rulemaking (R).20-05-003 (Order Instituting Rulemaking to Continue Electric Integrated Resource Planning and Related Procurement Processes). This decision grants, with modifications, the petition for modification (PFM) of D.23-02-040 and D.24-02-047 filed by the Southern California Edison Company (SCE), seeking a waiver of the requirements for bridge contracts for resources required by D.21-06-035 and D.23-02-040, for the months not including July, August, and September of each year. SCE's PFM argues that there is no short-term reliability need for these bridge resources during the lower-demand months, and that load serving

entities (LSEs) that have met their month-ahead system RA requirements should not be required to procure additional bridge resources not needed for short-term reliability. According to the proposed decision, this decision goes beyond the relief requested by SCE and eliminates the option for LSEs to use bridge contracts as an alternative compliance mechanism for the long-term procurement requirements of D.21-06-035 and D.23-02-040 for all months of the year, relieving ratepayers of the additional costs of those bridge resources that do not provide significant short-term reliability benefits. The decision determines that, for the purposes of satisfying procurement obligations in D.21-06-035 and D.23-02-040, the RA month-ahead requirements should provide sufficient incentive to procure the same types of resources included in most bridge contracts, if such contracts prove necessary for short-term reliability purposes.

Item 25. R.25-09-XXX (Order Instituting Rulemaking to Enhance Demand Response in California). This Order Instituting Rulemaking (OIR) seeks to evaluate and enhance the consistency, predictability, reliability, and cost-effectiveness of demand response resources. The rulemaking will update the demand response guiding principles, policies, and data system and process requirements.

Item 26. A.24-09-001 (Application of Southwest Gas Corporation for Authority to Increase Rates and Charges for Gas Service in California, Effective January 1, 2026). This interim decision grants the motion filed by Southwest Gas Corporation to establish a GRC Memorandum Account to track changes in its revenue requirement for the period beginning January 1, 2026, through the effective date of the Commission's final decision regarding Southwest Gas' revenue requirement increase request through A.24-09-001, if the decision is issued after January 1, 2026.

Item 27. A.12-05-020 (In the Matter of Application of SDG&E for a Certificate of Public Convenience and Necessity for the South Orange County Reliability Enhancement Project). This decision grants SDG&E's PFM of D.16-12-064 to increase the \$381 million cost cap established by that decision and adopts \$410 million as the increased reasonable and prudent maximum cost cap for the South Orange County Reliability Enhancement Project.

Item 43. A.23-05-010 (SCE 2025 Test Year GRC Application). The decision approves a test year base revenue requirement of \$9.756 billion for SCE for 2025-2028. The adopted amount is a 13.68 percent increase over SCE's current authorized revenue requirement compared to SCE's requested 22.15 percent increase. This decision also authorizes post-test year revenue requirement adjustments of \$453 million for 2026 (a 4.64 percent increase), \$411 million for 2027 (a 4.03 percent increase), and \$374 million for 2028 (a 3.52 percent increase), along with the adoption of a post-test year ratemaking mechanism. SCE requested approximately \$5.104 billion in capital expenditures for wildfire mitigation from 2025-2028, and the decision approves approximately \$3.085 billion of total capital expenditures for wildfire mitigation. SCE is directed to implement the 2025 test year revenue requirement in rates beginning October 1, 2025, or as soon thereafter as it may be affected. The incremental revenue increase that has accrued from January 1, 2025 through September 30, 2025 will be amortized over a 24-month period.

Upcoming Workshops and Events

R.21-06-017 (High DER Proceeding). The CPUC will host its quarterly Integration Capacity Analysis (ICA) meeting on Wednesday, October 1, 2025 from 9 a.m. to 3:30 p.m. PT. The ICA workshop provides an opportunity for the utilities to present their ICA reports, including discussion on known issues, improvements, validation measures, and stakeholder feedback. The workshop is held remotely via Webex and registration is available [here](#).

CALIFORNIA INDEPENDENT SYSTEM OPERATOR (CAISO)

Stakeholder Initiatives: Upcoming Meetings and Deadlines

2025-2026 Transmission Planning Process. CAISO will host a public stakeholder meeting on September 24 and September 25, 2025, to discuss the preliminary reliability study results, participating transmission owner's reliability projects, and updates on other analysis related to the 2025-2026 Transmission Planning Process. Written comments are due October 9, 2025. Further information is available [here](#).

Generator Interconnections 2025 Non-Refundable Funds Distribution. CAISO will distribute non-refundable interconnection financial security and study deposit amounts totaling \$18,602,949.13 (including interest) on September 16, 2025, in accordance with CAISO tariff Appendix DD Section 7.6., Application of Non-Refundable Amounts. Further information is available [here](#).

Study Timeline for Cluster 15. CAISO has issued an Updated Resource Interconnection Standards Study Timeline for Cluster 15. Further information is available [here](#).

2026 Net Qualifying Capacity. CAISO has posted the Final 2026 RA Net Qualifying Capacity list for requesting resources. Further information is available [here](#).

2025-2026 Transmission Planning Process. CAISO has posted the 2025-2026 Transmission Planning Process preliminary reliability results to its website. The request window is open until October 15, 2025. Further information is available [here](#).

2025 Intra-Cluster Reliability Network Upgrade Prioritization. CAISO has posted its 2025 Intra-Cluster Reliability Network Upgrade Prioritization Study Plan and Methodology document, and a list of Interconnection Customer projects with qualifying Reliability Network Upgrades where available capacity to interconnect earlier may exist. Eligible interconnection customers will receive an email with application instructions. Additional information is available [here](#).

Western Energy Markets Governing Body, Joint, ISO Board of Governors, and Committee Meetings. CAISO has posted the draft agendas for the Western Energy Markets Governing Body, Joint, ISO Board of Governors, Audit Committee, and Department of Market Monitoring Oversight Committee meetings from September 9 to September 11, 2025. Further information is available [here](#).

Western Energy Markets Regional Issues Forum. The Western Energy Markets Regional Issues Forum has announced its upcoming hybrid meeting, which will take place at the CAISO in Folsom, CA on October 27, 2025. Registration is requested for in-person attendees, and additional materials will be available prior to the meeting. Further information is available [here](#).

CALIFORNIA ENERGY COMMISSION (CEC)

2025 Integrated Energy Policy Report (IEPR)

The CEC has released the 2025 IEPR [workshop schedule](#) and opened a new proceeding number ([25-IEPR-01](#)) for the 2025 IEPR. Workshop topics and dates included in the notice are below (note: the workshop schedule is subject to change and the current schedule was released on July 2, 2025). Upcoming workshops or comment deadlines and recent changes to the workshop schedule are reflected below:

- **November 13, 2025:** IEPR Commissioner Workshop on Load Modifier Results (remote access only).
- **December 11, 2025:** IEPR Commissioner Workshop on Forecast (remote access only) – *rescheduled from December 2, 2025.*

On July 22, 2025, the CEC released a [Revised Scoping Order](#) for the 2025 IEPR, which updates the original Scoping Order posted in March 2025.

Electric Program Investment Charge (EPIC)

The CEC has opened [registration](#) for the 2025 EPIC Symposium, which will be held on October 7, 2025 at the California Natural Resources Agency in Sacramento. The EPIC symposium is held in collaboration with the state's three largest investor-owned utilities, and it convenes clean energy leaders, policy makers, researchers, entrepreneurs, and other stakeholders to discuss the latest innovations driven by EPIC. In-person attendance is limited due to venue capacity, so early registration is encouraged. Additional information and the registration link are available [here](#).

Suspension of Solar Photovoltaic (PV) and Storage Requirements for Homes Impacted by Los Angeles Wildfires

On August 29, 2025, the CEC issued a notice that [Executive Order N-29-25](#) suspends the solar PV and battery energy storage requirements of the California Energy Code (Sections 140.10(a-b), 150.1(c)14, and 170.2(f-h)) as they apply to newly constructed residential dwellings.

Long Duration Energy Storage Program

On September 11, 2025, the CEC will host a remote access [workshop](#) from 1:00 p.m. to 3:00 p.m. PT regarding the Draft Energy Storage Permitting Guidebook: Guidance for Behind-

the-Meter Installations (Draft Guidebook), funded under the EPIC Program (EPC-19-026). The workshop will provide the grant recipient, the Center for Sustainable Energy, the opportunity to receive input regarding the Draft Guidebook. According to the workshop [notice](#), a copy of the Draft Guidebook will be made available [here](#) at least 10 business days before the workshop date. The notice provides that the “workshop will focus on identifying any corrections or substantive omissions to the Draft Guidebook” and “[f]eedback gathered during [the] workshop will inform the publication of the final version of the Guidebook, expected to be published in Q2 2026.” Written comments regarding the Draft Guidebook are due by 5:00 p.m. PT on October 10, 2025 to [Docket No. 23-ERDD-07](#).

New Funding Announced for Electric Vehicle (EV) Charging

The CEC announced the launch of [Fast Charge California Project](#), which includes up to \$55 million in-state funding for up to 100% of the installation costs for EV chargers at businesses and public sites across the state. Funding applications will be accepted through October 29, 2025, and priority will be given to tribal areas and low-income and underserved communities. Eligibility details and other application requirements are available [here](#).

Extended Comment Period Regarding EV Charging Infrastructure Reliability Rules

On September 8, 2025, the CEC issued a notice of additional proposed changes to the EV Charging Infrastructure Reliability Reporting and Performance Standards in response to stakeholder feedback. A link to the newly proposed changes is available [here](#). Changes include an expanded definition of “fleet charger” to include those used solely to charge commercial vehicles and to specifically include use by subcontractors; a revised definition of “incentive” to specifically include Low Carbon Fuel Standard program credits; and changes to the confidentiality protocols and data submission guidelines. Stakeholders may submit comments on the proposed rules through September 24, 2025.

Informational Proceeding on Tribal Affairs and Tribal Energy Sovereignty

The CEC will host Regional Roundtable 2 (Roundtable) on September 17, 2025 at the Pechanga Resort Casino in Temecula, California in collaboration with the Pechanga Band of Indians. The Roundtable is part of the CEC’s Informational Proceeding on Tribal Affairs and Tribal Energy Sovereignty and is open to all California Native American tribes. Additional information is available in the Roundtable [notice](#). The proposed agenda includes Tribal Consultation; Tribal Energy Sovereignty; Tribal Cultural Resource Considerations Regarding Clean Energy Development; Best Practices for Tribal Energy Grants, Tribal Energy Equity Indicators, and Engaging with California Native American Tribes on Energy Projects; Tribal Energy Economy Including Tribal Enterprise and Workforce Development; AB 3: California Offshore Wind Advancement Act; and California Tribal Gap Analysis Draft Report. A detailed agenda will be posted to [Docket No. 2025-OIIP-01](#) prior to the event. This is an in-person only event and public (oral) comments will be accepted at the event as set forth in the Roundtable [notice](#).

CEC Business Meetings

The next CEC Business Meeting is scheduled for September 10, 2025. The meeting agenda and additional materials are available [here](#).

CALIFORNIA AIR RESOURCES BOARD (CARB)

Climate Risk Disclosure Laws Update

CARB announced it will be issuing proposed rules for the state's climate risk disclosure laws, Senate Bills (SB) 253 and 261, on October 14, 2025. CARB also issued a projected cost of compliance for the laws and shared the disclosure timeline for companies covered by SB 253 to disclose their scope 1 and scope 2 emissions for the first time. Companies covered by SB 253 should expect to report their scope 1 and scope 2 emissions by June 30, 2026.

CARB also released [draft guidance](#) on September 2 to assist reporting entities in complying with the Climate Related Financial Risk Disclosure Program.

Meetings and Workshops

On September 25, 2025, CARB will conduct a public hearing to consider proposed amendments to the Advanced Clean Fleets (ACF) and the Low Carbon Fuel Standard (LCFS) regulations. According to CARB, the proposed amendments would provide more flexibility to public agency utilities subject to the state and local government requirements of the ACF regulation. This rulemaking also would repeal California Code of Regulations, title 13, §§ 2014 and 2015, which contains the drayage and high priority and federal fleet requirements of the ACF regulation. In January 2025, CARB withdrew its request for a waiver and authorization for the addition of the ACF regulation to California's emissions control program, foreseeing that the waiver request to the U.S. Environmental Protection Agency would not be granted. The proposed amendments will also amend the LCFS regulation set forth in California Code of Regulations, title 17, § 95486.3, to provide stronger credit support for hydrogen stations.

MINNESOTA PUBLIC UTILITIES COMMISSION (MPUC)

At its September 11, 2025 agenda meeting, the MPUC will consider: (1) adoption of the ALJ Report and granting the associated route permit for Dairyland Power Cooperative's 161 kV Transmission Line in Fillmore County, Minnesota (ET3/TL-24-95); (2) approval of GRE's request for a one-year extension until April 1, 2027 to file its next Integrated Resource Plan, and if it grants such an extension, whether to require GRE to file an Interim Report (Docket No. ET2/RP-22-75); and (3) whether to direct Xcel Energy to perform a study evaluating the contribution to Minnesota system costs caused by residential customers with different usage profiles (Docket No. E002/CI-24-115).

FEDERAL ENERGY REGULATORY COMMISSION (FERC)

FERC will hold its [September Open Meeting](#) on September 18, 2025 from 10:00 to 11:00 a.m. ET. A webcast link and the agenda will be available the week of the FERC Meeting.