



California's Progress Toward the Load-Shift Goal

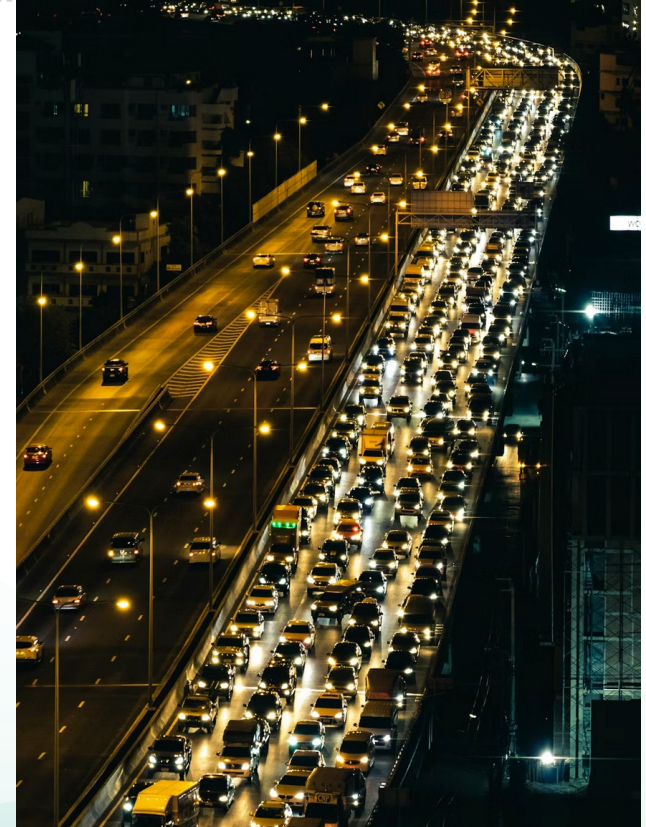
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Load Flexibility Definition:

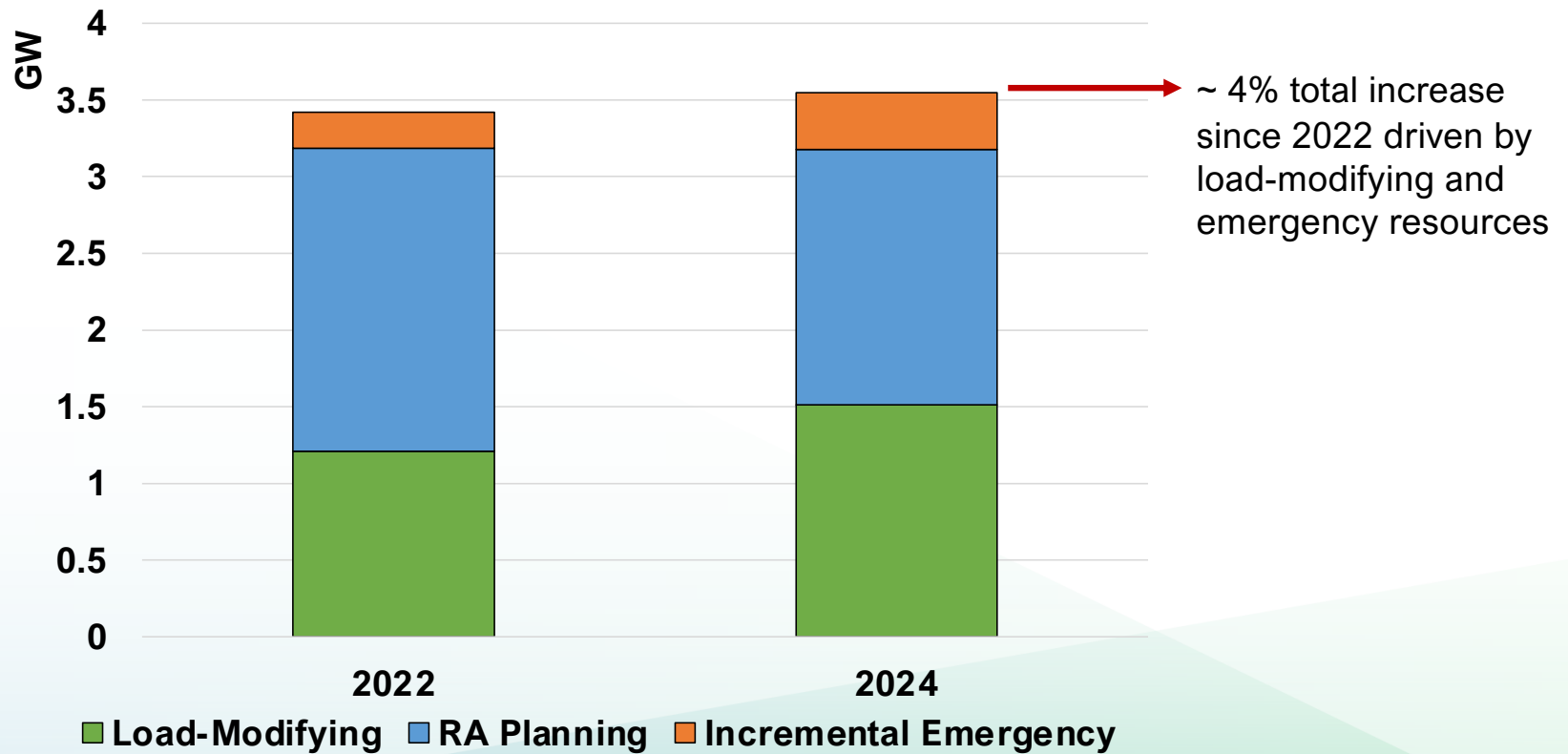
“Load flexibility is the capability to shift or shed electric demand away from times when electricity is expensive, polluting, and scarce to times when it is inexpensive, clean, and plentiful.”





2024 Resource Estimate is ~ 3.5 GW

Demand Flex Resource Stack: 2025 Update

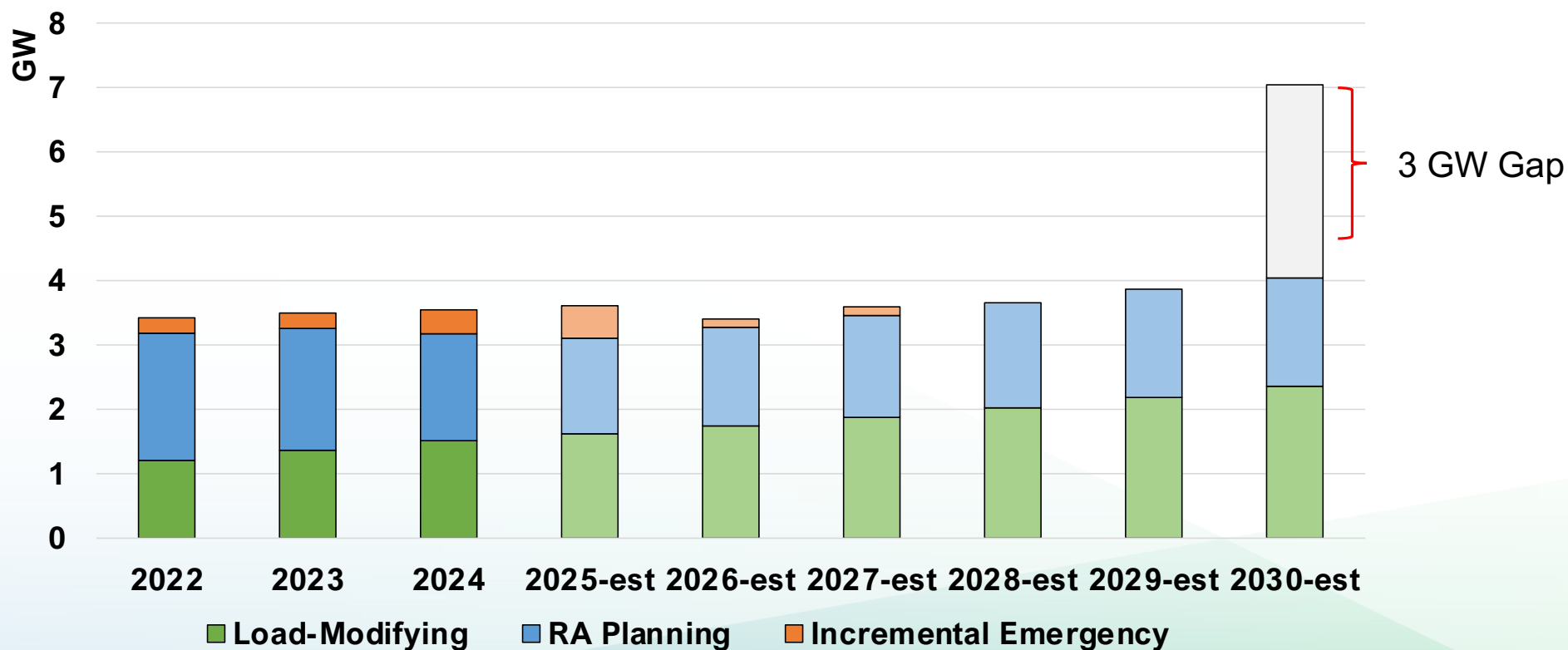


Source: California Energy Commission



2025-2030 Projections: Business-As-Usual (BAU) Conditions

CA Demand Flex Resource 2030 Projections - BAU Scenario



Source: California Energy Commission



Key Takeaways

- CA needs additional near-term strategies to reach the 7 GW target by 2030.
- Bidirectional charging and data center impacts are largely unknown
- New IOU efforts, such as hourly dynamic rates, may improve the outlook.
- Changes in electrification incentives will likely impact the 2030 projections.



CEC Stakeholder Survey

Purpose: Get stakeholder input on barriers, solutions and strategies to achieving California's load shift goal of 7 GW by 2030.

Stakeholder Process

- Surveyed 39 stakeholders
 - Aggregators, technology providers
 - Load serving entities
 - Consultants, research groups
 - Industry associations, consumer advocacy groups
- Received 27 responses

Survey Topics

1. Policy barriers impacting the full utilization of load flexibility
2. Alternative market or regulatory models and approaches
3. Emerging trends in California's market
4. Other conceptual ideas to scale load flexibility



Market/Policy Barriers

1. Limiting program requirements (wholesale participation)
2. Differing program rules and frequent changes
3. Limited data access
4. Lack of communication standards and interoperability

Additional recommendations:

5. Ensure affordability, equity, customer engagement
6. Utilize load flex for the distribution grid
7. Expand opportunities for vehicle-grid integration



Thank You!

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