

From: Simon, Sean A.
Sent: 12/3/2010 8:31:51 AM
To: Redacted Allen,
Meredith (/O=PG&E/OU=Corporate/cn=Recipients/cn=MEAe)
Cc: Douglas, Paul (paul.douglas@cpuc.ca.gov)
Bcc:
Subject: Confidential -- RE: Energy Division Data Request_RPS Portfolio Analysis

CONFIDENTIAL MATERIAL

Meredith,

Can you explain why PG&E's updated Net Market Value calculations for the Shell contracts don't provide forecasted Levelized TOD-Adjusted Prices or Levelized Energy Values? I expected to see estimates for all pending contracts based on the contractual delivery profiles and PG&E's current forward curve. PG&E provided this information for the Barclays contracts which I believe are similarly structured as the Shell contracts. I have attached a copy of PG&E's response for your convenience.

Regards,
Sean

Sean A. Simon | Energy Division - Analyst | CA Public Utilities Commission | Tel (415) 703-3791

<http://www.cpuc.ca.gov/renewables>

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From: Redacted
Sent: Monday, November 22, 2010 3:18 PM
To: Simon, Sean A.

Cc: Allen, Meredith
Subject: RE: Energy Division Data Request_RPS Portfolio Analysis

CONFIDENTIAL MATERIAL

Sean:

Attached is PG&E's response. Please let us know if you have any questions.

Thanks,

Redacted

From: Simon, Sean A.
Sent: Monday, November 08, 2010 5:51 PM
To: 'Allen, Meredith'
Subject: Energy Division Data Request_RPS Portfolio Analysis

PG&E,

Please respond to this two-part data request from Energy Division staff by November 22, 2010. Any questions concerning this data request should be directed to Sean Simon at svn@cpuc.ca.gov or 415-703-3791.

A. PG&E RPS Portfolio Analysis

The spreadsheet is based on the RPS compliance reporting template. Please input the requested information in yellow cells, as PG&E customarily does for its biannual RPS compliance filing. One additional column has been added to the spreadsheet to collect project specific Project Viability Calculator scores. See Procurement Detail tab, Column X "PVC Score."

B. Current Net Market Valuation for Pending Contracts

For all pending contracts, please update the Net Market Value using a single current forecast for the "Levelized Energy Value." Also, update any other information, as necessary, to provide a current and accurate Net Market Value for each pending contract. For any contract with pricing provisions that establish a range of potential prices where the total costs may increase or decrease by 5% or more, identify an "expected" and "maximum" Levelized TOD-Adjusted Price and corresponding Net Market Value. Please provide the information in the following table format.

Contract/Project	Levelized	Levelized	Levelized	Transmission	Net Market
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	TOD-Adjusted Price	Energy Value	Capacity Value	Adder	Value
Contract A					
Contract B					

Regards,
Sean

Sean A. Simon | Energy Division - Analyst | CA Public Utilities Commission | Tel (415) 703-3791

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