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08/19/26

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BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Application of Southern California Edison Company (U338E) for Authorization to Deploy Advanced Metering Infrastructure 2.0 and for Associated Cost Recovery.

Application 26-03-030

ASSIGNED COMMISSIONER'S SCOPING MEMO AND RULING

This scoping memo and ruling sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding pursuant to Public Utilities (Pub. Util.) Code Section (§)1701.1 and Article 7 of the Commission's Rules of Practice and Procedure (Rules).

1. Procedural Background

Southern California Edison Company (SCE) filed the instant application on March 26, 2026 (Application). On March 27, 2026, SCE filed a motion for authority to establish a memorandum account to track certain Advanced Metering Infrastructure (AMI) 2.0 costs¹ beginning in 2026.

On April 13, 2026, the Public Advocates Office at the California Public Utilities Commission (Cal Advocates) filed a response to SCE's motion for authority to establish an AMI 2.0 memorandum account. SCE replied to Cal Advocates' response on April 23, 2026.

¹ According to SCE, the original generation of advanced meters – AMI 1.0 – is nearing the end of its intended 20-year lifespan. SCE intends to complete its transition to the next generation of AMI 2.0 meters before vendor support for AMI 1.0 concludes. *See* Application at 1-2.

On April 29, 2026, The Utility Reform Network (TURN), Mission:data Coalition (Mission:data), and Cal Advocates filed protests and California Choice Energy Authority (CalChoice) and Small Business Utility Advocates (SBUA) filed responses to the Application.

On May 27, 2026, SCE, Cal Advocates, CalChoice, Mission:data, SBUA, and TURN filed a joint prehearing conference statement. This statement included 17 issues agreed upon by parties to include in scope, and two issues that TURN requested for inclusion in scope and SCE opposed.²

A prehearing conference (PHC) was held on June 1, 2026 to address the issues of law and fact, determine the need for hearing, set the schedule for resolving the matter, and address other matters as necessary. After considering party protests and responses and discussion at the PHC, I have determined the issues and initial schedule of the proceeding to be set forth in this scoping memo. I have also determined that no environmental and social justice issues have been raised at this time.

2. Issues

The issues to be determined or otherwise considered are:

1. Whether the Commission should authorize SCE to implement a multi-year program to replace the current AMI 1.0 meters with a new generation of AMI 2.0 meters.

² The two contested scoping issues are: (1) whether SCE's AMI 1.0 was cost-effective and whether the forecasted benefits were realized, and (2) whether SCE provided sufficient information and mitigation for potential stranded assets and the appropriate ratemaking treatment. See May 27, 2026, joint prehearing conference statement at 5-6.

2. Whether SCE's AMI 2.0 proposal:
 - a. Is cost-effective and will provide lasting value to customers;³
 - b. Incorporates lessons learned from the current generation of AMI 1.0 meters;⁴
 - c. Is based on a reasonable business case and deployment plan;⁵
 - d. Reflects a reasonable technology choice based on AMI technologies available on the market;
 - e. Is aligned with State energy policy objectives and requirements.⁶
 - f. Addresses risks to fair competition.⁷
3. Whether the costs to be recovered in rates from customers to fund the deployment of AMI 2.0 are just and reasonable in compliance with Pub. Util. Code §451 and other applicable statutes and Commission decisions.⁸
4. If the Commission grants the Application, what follow-up measures should the Commission order, such as advice letters and customer outreach.
5. Whether the Commission should adopt any additional safety measures associated with this Application.

³ Including issue 17 identified by parties in the May 27, 2026 joint prehearing conference statement and contested issues 1 and 2 identified by TURN, with additional clarification and limitations provided below.

⁴ Including issue contested issue 1 identified by TURN, with additional clarification and limitations provided below.

⁵ Including issue 15 identified by parties.

⁶ Including issues 11, 13, and 14 identified by parties.

⁷ Including issue 16 identified by parties.

⁸ Including issue 12 identified by parties.

6. Whether SCE should be authorized to establish an AMI 2.0 Memorandum Account to track, record, and recover actual AMI 2.0 costs, and a Balancing Account into which to transfer amounts recorded in the AMI 2.0 Memorandum Account.⁹

These scoping questions are intended to address all 17 issues agreed upon by parties in their joint prehearing conference statement.

Concerning TURN's proposal to consider whether SCE's AMI 1.0 was cost-effective and whether the forecasted benefits were realized, to the extent the evaluation of AMI 1.0 is used to provide lessons learned that are relevant and applicable to SCE's 2.0 proposal, such an evaluation would help inform whether SCE's AMI 2.0 proposal is reasonable and will provide customer benefits. However, and as generally agreed upon by the parties, this proceeding is not intended to relitigate the costs, benefits, or reasonableness of SCE's AMI 1.0 meters.

The two contested issues may be addressed within scope as part of issue 2.a., with the following guidelines intended for the effective resolution of this proceeding:

- Parties may develop the record on AMI 1.0 cost-effectiveness and potential stranded assets.
- In discovery and testimony, intervenors shall only focus on facts that could inform a final decision on AMI 2.0 in this proceeding.

3. Questions for Supplemental Testimony

The application, testimony, and workpapers provide insufficient information about: 1) the four system configurations that SCE evaluated,¹⁰ and 2)

⁹ Including issues 7, 8, 9, and 10 identified by parties.

¹⁰ Application at 5-6; Exhibit SCE-02, Volume 2.

how SCE determined that the “Value Upgrade” option was the preferred option. Without additional information, the Commission considers this application incomplete.

SCE is directed to address the questions in Attachment A by September 11, 2026 as supplemental testimony. Upon review of the supplemental testimony, the Commission may dismiss the application or require submission of a second supplemental testimony.

4. Need for Evidentiary Hearing

All issues are potentially contested, material issues of fact. Accordingly, we will allow parties to present evidence on these issues if evidentiary hearings are needed. Following party submissions of the joint case management statement, the assigned Administrative Law Judge (ALJ) will determine the need for evidentiary hearing and provide further instructions.

5. Schedule

The following schedule is adopted here and may be modified by the ALJ as required to promote the efficient and fair resolution of the application:

Event	Date
Supplemental testimony served	September 11, 2026
Second supplemental testimony served, if needed	October 30, 2026
Intervenors’ prepared direct testimony served	December 11, 2026
Prepared rebuttal testimony served	January 22, 2027
Rule 13.9 Meet & Confer/Joint case management statement	February 26, 2027
Evidentiary hearing	Week of March 15, 2027
Opening briefs	April 23, 2027

Reply briefs [matter submitted]	May 28, 2027
Proposed decision	<i>Within 90 days of submission</i>
Commission decision	Q3 2027

The purpose of the February 26, 2027 joint case management statement is to ascertain whether, pursuant to Rule 13.8(c), the parties stipulate to the receipt of prepared testimony into evidence without direct or cross examination or other need to convene an evidentiary hearing or, in the alternative, the parties' resources, readiness and needs for the effective remote conduct of the evidentiary hearing, including estimates of time requested for cross-examination and identification of anticipated exhibits.

The proceeding will stand submitted upon the filing of reply briefs, unless the ALJ requires further evidence or argument. Based on this schedule, the proceeding will be resolved within 18 months as required by Pub. Util. Code §1701.5.

6. Alternative Dispute Resolution (ADR) Program and Settlements

The Commission's Alternative Dispute Resolution (ADR) program offers mediation, early neutral evaluation, and facilitation services, and uses ALJs who have been trained as neutrals. At the parties' request, the assigned ALJ can refer this proceeding to the Commission's ADR Coordinator. Additional ADR information is available on the Commission's website.¹¹

Any settlement between parties, whether regarding all or some of the issues, shall comply with Article 12 of the Rules and shall be served in writing. Such settlements shall include a complete explanation of the settlement and a

¹¹ <https://www.cpuc.ca.gov/PUC/adr/>

complete explanation of why it is reasonable in light of the whole record, consistent with the law and in the public interest. The proposing parties bear the burden of proof as to whether the settlement should be adopted by the Commission.

7. Category of Proceeding and Ex Parte Restrictions

This ruling confirms the Commission's preliminary determination¹² that this is a ratesetting proceeding. Accordingly, ex parte communications are restricted and must be reported pursuant to Article 8 of the Rules.

8. Public Outreach

Pursuant to Pub. Util. Code §1711(a), where feasible and appropriate, before determining the scope of the proceeding, the Commission sought the participation of those likely to be affected, including those likely to derive benefit from, and those potentially subject to, a decision in this proceeding. This matter was noticed on the Commission's daily calendar. Where feasible and appropriate, this matter was incorporated into engagements conducted by the Commission's External Affairs Division with local governments and other interested parties.

9. Intervenor Compensation

Pursuant to Pub. Util. Code §1804(a)(1), a customer who intends to seek an award of compensation must file and serve a notice of intent to claim compensation by July 1, 2026, 30 days after the PHC.

10. Response to Public Comments

Parties may, but are not required to, respond to written comments received from the public. Parties may do so by posting such response using the

¹² Resolution ALJ-3580 at 1.

“Add Public Comment” button on the “Public Comment” tab of the online docket card for the proceeding.

11. Public Advisor

Any person interested in participating in this proceeding who is unfamiliar with the Commission’s procedures or has questions about the electronic filing procedures is encouraged to obtain more information at <http://cpuc.ca.gov/pao> or contact the Commission’s Public Advisor at 866-849-8390 or send an e-mail to public.advisor@cpuc.ca.gov.

12. Filing, Service, and Service List

The official service list has been created and is on the Commission’s website. Parties should confirm that their information on the service list is correct and serve notice of any errors on the Commission’s Process office, the service list, and the ALJ. Persons may become a party pursuant to Rule 1.4.¹³

When serving any document, each party must ensure that it is using the current official service list on the Commission’s website.

This proceeding will follow the electronic service protocol set forth in Rule 1.10. All parties to this proceeding shall serve documents and pleadings using electronic mail, whenever possible, transmitted no later than 5:00 p.m., on the date scheduled for service to occur. Rule 1.10 requires service on the ALJ of both an electronic and a paper copy of filed or served documents.

When serving documents on Commissioners or their personal advisors, whether or not they are on the official service list, parties must only provide

¹³ The form to request additions and changes to the Service list may be found at <https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/administrative-law-judge-division/documents/additiontoservicelisttranscriptordercompliant.pdf>

electronic service. Parties must not send hard copies of documents to Commissioners or their personal advisors unless specifically instructed to do so.

Persons who are not parties but wish to receive electronic service of documents filed in the proceeding may contact the Process Office at process_office@cpuc.ca.gov to request addition to the “Information Only” category of the official service list pursuant to Rule 1.9(f).

The Commission encourages those who seek information-only status on the service list to consider the Commission’s subscription service as an alternative. The subscription service sends individual notifications to each subscriber of formal e-filings accepted by the Commission. Notices sent through subscription service are less likely to be flagged by spam or other filters. Notifications can be for a specific proceeding, a range of documents and daily or weekly digests.

13. Receiving Electronic Service from the Commission

Parties and other persons on the service list are advised that it is the responsibility of each person or entity on the service list for Commission proceedings to ensure their ability to receive emails from the Commission. Please add “@cpuc.ca.gov” to your email safe sender list and update your e-mail screening practices, settings and filters to ensure receipt of emails from the Commission.

14. Assignment of Proceeding

Commissioner Christine Harada is the Assigned Commissioner and Elizabeth Fox is the assigned ALJ and presiding officer for the proceeding.

IT IS RULED that:

1. The scope of this proceeding is described above and is adopted.
2. The schedule of this proceeding is set forth above and is adopted.
3. Evidentiary hearing is needed.
4. The presiding officer is ALJ Elizabeth Fox.
5. The category of the proceeding is ratesetting.

Dated August 19, 2026, at San Francisco, California.

/s/ Christine Harada
Christine Harada
Assigned Commissioner