

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**



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Application of San Diego Gas & Electric
Company (U 902-E) for Approval of its 2027
Electric Procurement Revenue Requirement
Forecasts, 2027 Electric Sales Forecast, and
GHG-Related Forecasts

A.26-05-009
(Filed: May 15, 2026)

JOINT RULE 13.9 MEET AND CONFER REPORT

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September 18, 2026

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Pursuant to Rule 13.9 of the California Public Utilities Commission’s (“Commission”) Rules of Practice and Procedure (“Rules”) and the Assigned Commissioner’s Scoping Memo and Ruling (dated July 22, 2026) (“Scoping Memo”), San Diego Gas & Electric Company (“SDG&E”), the Public Advocates Office at the California Public Utilities Commission (“Cal Advocates”), Direct Access Customer Coalition (“DACC”), and San Diego Community Power (“SDCP”) jointly with Clean Energy Alliance (“CEA”) (together, “SD CCAs”) (collectively, the “Parties”) jointly¹ file this report summarizing their meet and confer efforts and list of stipulated and disputed facts.

I. THE PARTIES’ MEET AND CONFER EFFORTS

Rule 13.9(a) states that “no later than 10 calendar days after the submission of rebuttal testimony the parties must meet and confer, in person or via remote participation to consider the following:

- (1) Identifying and, if possible, informally resolving any anticipated motions;
- (2) Identifying the facts and issues in the case that are uncontested and may be the subject of stipulation;
- (3) Identifying the facts and issues in the case that are in dispute;

¹ Pursuant to Rule 1.8(d), counsel for SDG&E certifies that she has been fully authorized by Cal Advocates, DACC, SDCP, and CEA to submit this joint motion on their behalf.

- (4) Determining whether the contested issues in the case can be narrowed; and
- (5) Determining whether settlement is possible.”

In addition, the Scoping Memo, Section 3 (Schedule) requires the Parties by September 18, 2026 to “inform ALJ whether hearings are necessary and identify the specific disputed issues of material fact, witness lists, and cross-examination estimates.”

On September 9, 2026, SDG&E served its prepared rebuttal testimony on the service list in this proceeding. Subsequently, on September 21, 2026, representatives of SDG&E, Cal Advocates, SDCP, and CEA met and conferred to address the issues as required by Rule 13.9 and the Scoping Memo. The Parties hereby summarize the results of their meet and confer efforts below.

A. Identifying and, if Possible, Informally Resolving any Anticipated Motions

The Parties do not anticipate filing any additional motions at this time, other than (1) a joint motion to move testimony and exhibits into the record, and (2) corresponding motion(s) to seal the evidentiary record pursuant to Rule 11.4 and/or Rule 11.5. The Parties reserve the right to file additional motions in this proceeding. For example, parties routinely conduct discovery following the October Update, and they may seek to introduce as evidence those discovery responses pertinent to parties’ comments on the October Update. This practice may result in additional motions to admit and motions to file and admit under seal.

B. Identifying the Facts and Issues in the Case That Are Uncontested and May Be the Subject of Stipulation

Given that the October Update to SDG&E’s 2027 ERRRA Forecast has yet to be submitted, the Parties are unable to identify a final list of issues that are uncontested and may be the subject of stipulation. However, the Parties will make every effort to identify the particular issues that remain contested/uncontested in their briefs and comments to the October Update.

To date, the following issues have been raised in the course of the proceeding and are currently uncontested:

- **Scoping Issue 1:** Whether the Commission should approve SDG&E's total 2027 forecast revenue requirement and the amount of the 2027 Tree Mortality Non-Bypassable Charge forecast revenue requirement, to become effective in rates on January 1, 2027.
- **Scoping Issue 2:** Whether the Commission should approve SDG&E's revenue requirement forecasts for the following:
 - c. 2027 CTC revenue requirement;
 - d. 2027 LG revenue requirement and projected 2026 LGBA year-end balance;
 - e. 2027 MCAM revenue requirement;
 - f. 2027 TMNBC revenue requirement; and
 - g. 2026 BioMat balancing account projected year-end balance.
- **Scoping Issue 3:** Whether the Commission should approve SDG&E to recover SDCP's 2027 DAC-GT revenue requirement.
- **Scoping Issue 4:** Whether the Commission should approve SDG&E's 2027 forecasts of GHG revenues, revenue set-asides and returns and administrative expenses, which include:
 - a. Forecast GHG allowance revenues;
 - b. Forecast set asides for programmatic use;
 - c. Forecast revenue returns to emissions intensive trade exposed retail customers;
 - d. GHG administration, customer education, and outreach plan costs; and
 - e. Forecast revenue returns to residential and small business customers via the California Climate Credit.
- **Scoping Issue 7:** Whether the Commission should approve SDG&E's 2027 Electric Sales Forecast.
- **Scoping Issue 8:** Other related matters.

C. Identifying the Facts and Issues in the Case That Are in Dispute

The following issues have been raised in the course of the proceeding, remain contested, and are anticipated by the Parties to continue to be in dispute following SDG&E's October Update; however, as noted above, the Parties cannot offer a finalized list of disputed issues absent the October Update.

For Cal Advocates:

At this stage of proceedings, Cal Advocates does not raise any specific facts or issues that are in dispute.

For SD CCAs:

- **Scoping Issue 2:** Whether the Commission should approve SDG&E's revenue requirement forecasts for the following:
 - a. 2027 ERRRA revenue requirement and projected 2026 year-end balance;
 - b. 2027 PABA revenue requirement and projected 2026 PABA year-end balance; and
- **Scoping Issue 5:** Whether the Commission should approve SDG&E's proposed vintage PCIA in rates.

With regard to Scoping Issues 2(a)-(b) and 5, the SD CCAs have raised concerns surrounding SDG&E's forecasts of Resource Adequacy ("RA") sales and Retained RA. These issues remain in dispute at the time of this report.

- **Scoping Issue 6:** Whether the Commission should approve SDG&E's proposed 2027 MCAM rates.

With regard to Scoping Issue 6, the SD CCAs recommended that SDG&E calculate and implement a Medium Commercial Class MCAM rate. This issue remains in dispute at the time of this report.

For DACC:

At this stage in the proceeding, DACC does not raise any additional facts or issues that are in dispute in addition to those cited above.

D. Determining Whether the Contested Issues in the Case Can Be Narrowed

Please see Sections I.B and I.C above, noting that the Parties are unable to finalize a list of disputed issues prior to SDG&E's October Update.

E. Determining Whether Settlement is Possible

The Parties have narrowed the number of contested issues and continue to discuss possible settlement. The Parties will inform the ALJ if any settlement is reached.

F. Evidentiary Hearings

Despite the disputed issues described above, the parties agree that evidentiary hearings are not necessary in this proceeding. Since evidentiary hearings are not necessary, the parties propose the following procedural mechanism for submitting testimony and other exhibits into the evidentiary record.

On or before September 25, 2026, the parties will submit a joint motion to enter testimony and exhibits into the evidentiary record, which would include the proposed exhibit list with the appropriate exhibit designations. The parties expect that they will be able stipulate to the admission of most if not all the exhibits. This would allow the parties to reference the proposed exhibits numbers set forth in the exhibit list in their respective briefs as necessary. If the parties are unable to stipulate to the admission of an exhibit(s), the joint motion will identify that exhibit(s) along with the offering parties' proffer and the objecting parties' position.

II. CONCLUSION

This concludes the Parties' joint report on meet and confer efforts. The Parties appreciate the Commission's time and effort in resolving this proceeding in an efficient manner.

Respectfully submitted,

/s/ Krista deBoer
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