



Summary Table of Public Benefit Programs and Electric Utility Restructuring (April 2004)

State	Description	Details of SBC Funding					Renewables			Generation Disclosure
		R&D	EE	LI	RE	Total	Portfolio Standard	ACC rule	ACC rule	
Arizona	In Dec96, the ACC ordered retail competition beginning in Jan99 and completed by Jan03. Later delayed to begin in 2001. Currently re-evaluating divestiture (Decision No. 65154). ACC rule requires SBC for LI, EE and RE. Funding determined in indiv. utility cases. Also a sep. charge for an "Environmental Portfolio Standard" (see RE). Also, EE may be shifted into RE.	million \$	TBD	2.0	5.0	32.0	ACC rule calls for 0.2% by 2001, up to 1.1% by 2007. Half must be solar elec.	Fuel mix and emissions are required by ACC rule.		
		mills/kWh	TBD	0.06	0.14	0.875				
		% rev.	TBD	0.08	0.19	1.18				
		admin.	TBD	Utility	Utility	Utility				
California	In Sept96, AB1890 signed into law, with full retail access Apr98. A 4-yr. SBC was created using a non-bypassable wires charge. In Aug00 the SBC got 10-yr extension, with inflation adjustment. Table shows just the 4 large IOUs. Small IOUs and munis are also spending over \$100 million/yr on pub ben. (New additional EE procurement funding, (\$245 mil.) not included in table.)	million \$	62.5	228.0	100.0	135.0	SB1078, passed in Sept. 02, req. min. increase of 1% per year, escalating to 20% by 2017	A "power content label" is required for generation mix.		
		mills/kWh	0.4	1.3	0.5	0.8	3.0			
		% rev.	0.4	1.3	0.5	0.8	3.0			
		admin.	CEC	Utility	Utility	CEC				
Connecticut	In April 1998 Public Act 98-28 was signed into law. Phases in retail access during 2000. It funds EE, RE, and LI. RE ramps up over time, average is in table. Some LI in EE. Support for R&D is imbedded in the RE programs. Funds are collected through a non-bypassable wires charge. In May 2003, the RPS was strengthened to apply to all providers.	million \$	R&D	EE	LI	RE	Total	Generation Disclosure		
		mills/kWh	in RE	87.0	8.7	22.0	117.7	By 2010, 10% of all power must come from renewables (7% from the preferred sources)	Disclosure of fuel mix and emissions is required to be submitted to the DPUC.	
		% rev.	in RE	3.0	0.3	0.75	4.05			
		admin.	EE & RE	Utility	Utility	St. Auth.				
Delaware	Restructuring Act signed in March 1999. Had two SBCs: 0.178 mills/kWh for EE "incentive" programs, and 0.095 mills/kWh for LI bill asst. & EE. An additional \$250,000 from rates went towards customer education, esp. regarding RE. SB93 (June03) renamed the Environmental Incentive Fund to the Green Energy Fund. Focus now on RE and LI.	million \$	R&D	EE	LI	RE	Total	Generation Disclosure		
		mills/kWh			1.5	1.5	3.0	Rules require all elec. suppliers to disclose fuel mix. Standard label is not required.		
		% rev.			0.18	0.18	0.36			
		admin.			0.30	0.30	0.60			
District of Columbia	In May 2000 Congress passed restructuring bill for D.C. Includes a "Reliable Energy Trust Fund". To be funded by a non-bypassable charge of up to 0.8 mills/kWh. (After 4 years, can increase to a maximum of 2.0 mills/kWh.) Covers EE, RE and LI. To be administered by the local District government. As of Mar04, charge is 0.19 mills with further allocation TBD.	million \$	R&D	EE	LI	RE	Total	Generation Disclosure		
		mills/kWh		TBD	2.1	TBD	8.0	Commission Working Group is examining the issue.	Disclosure of fuel mix is required to be reported every 6 months to the Commission.	
		% rev.		TBD	0.19	TBD	0.8			
		admin.		TBD	0.26	TBD	1.0			
Illinois	In Dec97, PA 90-561 was signed. It provides funding for EE, RE and LI (although EE and RE are at low levels), using non-bypassable flat monthly charges on customer bills. ("mills/kWh" equiv. includes \$ from gas & electric.) Also, one-time ComEd \$250 million Clean Energy Trust fund ok'd by legis. May 99 (not in table).	million \$	R&D	EE	LI	RE	Total	Generation Disclosure		
		mills/kWh		3.0	75.0	5.0	83.0	20 ILCS 688, Jul01, cites a renewables goal of 5% by 2010 & 15% by 2020. No mandate.	All electricity retailers are required to disclose generation mix and emissions to customers.	
		% rev.		0.03	0.6	0.04	0.67			
		admin.		0.04	0.8	0.05	0.9			

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State	Description	Details of SBC Funding				Renewables Portfolio Standard		Generation Disclosure	
		R&D	EE	LI	RE	Total	Total		
Maine	In May97, a state restructuring law was passed. The PUC has proposed, and legislature has authorized, a surcharge equivalent to approximately 1.5 mills/kWh. State PUC oversees. Some LI in EE. R&D is voluntary funding.	million \$	15.0	6.1		21.1	30% starting Mar00.	Fuel mix and emissions disclosure is required.	
		mills/kWh	1.5	0.8		2.3	Limited to facilities of 100-MW or less.		
		% rev.	1.3	0.55		1.85			
		admin.	TBD	MPUC	State				
Maryland	Restructuring Law signed in April 1999. Includes \$34 million/yr. tax funded "Universal Service Fund" for bill assist and EE for LI customers. (Table shows mills/kWh and % rev. equiv.) In addition, 2 of state's 3 largest utilities agreed in settlements to have up to 1 mill/kWh EE addressed in settlements with individual utilities.	million \$	TBD	34.0		TBD	PSC produced an RPS feasibility report in Dec 99. To date, no RPS legis. has been passed.	Generation Disclosure Fuel mix and emissions disclosure is required.	
		mills/kWh	TBD	0.6		TBD			
		% rev.	TBD	0.9		TBD			
		admin.	Utility	State					
Massachusetts	In Nov97 comprehensive legislation was signed bringing retail access to all customers in 1998. Includes a non-bypassable wires charge for EE, RE and LI. LI must get at least .25 mills of the EE SBC. (Note: RE excludes .25 mills/kWh for Municipal Solid Waste). In Feb. 2002, legislation was signed extending the SBC for five years, through Dec. 2007.	million \$	117.0	Incl.	24.0	141.0	Requires a new 1% increment by 2003, to 4% by 2009, 1%/yr. thereafter.	Generation Disclosure Fuel mix and emissions disclosure is required. Member N.E. Disclosure Project	
		mills/kWh	2.50	in	0.5	3.0			
		% rev.	2.50	EE	0.56	3.06			
		admin.	Utility	Utility	MTPC				
Michigan	Restructuring law (PA 141) passed in 2000. The bill authorized creation of a "low income and energy efficiency fund", to be funded through savings from utility securitization. The MPSC implemented a Request for Proposal process for distributing funds and determining allocations to LI and EE projects. Funding is estimated to be \$50 million/year for 6 years.	million \$	10.0	40.0	in	50.0	None.	Generation Disclosure Fuel mix and emissions disclosure is required.	
		mills/kWh	0.1	0.4	EE	0.5			
		% rev.	0.14	0.56	MPSC	MPSC	0.7		
		admin.	MPSC	MPSC	MPSC				
Minnesota	Restructuring legislation has not passed in Minnesota. State statute 216B.241 mandates electric utilities to invest 1.5% of their gross operating revenues (GOR) into EE. Electric cos. that operate nuclear plants in the state (Xcel) must invest 2% GOR into EE. 2003 legislation required Xcel to pay \$16 million annually into the Renewable Development Fund, established in 1999.	million \$	44.3		16.0		Per 216B.1691 (2001), begins in 2005, min. req. of 1%, increasing by 1%/yr to 10% by 2015.	Generation Disclosure Fuel mix and emissions disclosure is required.	
		mills/kWh	1.1		0.4				
		% rev.	1.9		Utility	Utility			
		admin.	Utility	Utility	Utility				
Montana	In May97, electric utility restructuring was signed into law. Retail access began July98 and was originally scheduled to be completed by July02. Retail choice for all customers has been delayed until July 1, 2027. Using EE and RE funds for R&D is approved by the statute. Funds are collected using a "universal system benefit charge." LI must be at least 17% of total.	million \$	8.9	3.3	1.8	14.0	None.	Generation Disclosure The PSC has proposed disclosure but no orders have been issued.	
		mills/kWh	0.7	0.26	0.14	1.1			
		% rev.	1.5	0.6	0.3	2.4			
		admin.	Utility	Utility	Utility				

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	In July97, electric utility restructuring was passed. Retail access was scheduled for March 2000, but delayed due to CA problems. In 2001, AB 369 halted restructuring. RPS and disclosure passed separately in 2001. In 2003, EE funding was approved as part of the utility's Integrated Resource Plan, (rather than its restructuring plan), so the EE funding source is technically not an SBC.	Details of SBC Funding					Renewables Portfolio Standard		Generation Disclosure
		million \$	R&D	EE	LI	RE	Total	Portolio Standard	Generation Disclosure
Nevada	In 2001, AB 369 halted restructuring. RPS and disclosure passed separately in 2001. In 2003, EE funding was approved as part of the utility's Integrated Resource Plan, (rather than its restructuring plan), so the EE funding source is technically not an SBC.			11.2	10.0	21.2	SB 372 passed in 2001. Requires 5% by 2003, 15% by 2013.	AB 197 of 2001 requires disclosure of fuel mix and emissions info., twice a year.	
		mills/kWh		0.43	0.39	0.82			
		% rev.		0.5	0.45	0.95			
		admin.		Utility	State				
New Hampshire	In May96, NHRSA was passed into law. Retail access was to be implemented in Jan98, but conflicts over stranded costs delayed the process. The statute authorized funding for R&D, EE, RE and LI, but the initial PUC plan only funded LI. In Jun00, SB 472 set an SBC of 2.0 mills/kWh. In Nov00 The PUC allocated 1.2 mills to LI and 0.8 mills to EE. In 2002, EE was increased to 1.8 mills.								
		mills/kWh		15.0	10.4	25.4			
		% rev.		1.8	1.2	3.0	None.	Participants in the New England Disclosure Project, though not required yet.	
		admin.		1.52	1.0	2.52			
				Utility	Utility				
New Jersey	Restructuring law passed in Jan.99. Requires SBC funding for EE/RE at same level as existing DSM costs (approx. \$235 million/yr.). Full SBC is 3.6 mills. Half would pay for costs from prior years, half for new programs. 25% of new must be RE. Numbers in table are new programs only, set in BPU order Mar01. LI separately funded at prior levels.								
		mills/kWh		89.5	10.1	30.0			
		% rev.		1.30	0.16	0.43	By Jan01 to be 0.5% from "Class 1", by Jan.06 1.0%. Ramps up to 4% by 2012.	Required for fuel mix and emissions.	
		admin.		NJ BPU	Utility	NJ BPU			
New Mexico	New Mexico's restructuring legislation, SB 428, signed in April 1999, was repealed in 2003 with the passage of Senate Bill 718. None of the state's public benefits programs survived.								
		mills/kWh							
		% rev.							
		admin.							
New York	In May96, the PSC issued Order 96-12, requiring all IOUs to file restructuring plans. A July98 Order set \$78 million/year for an SBC, administered by NYSERDA. In Jan01 the PSC raised the SBC to \$150 million/yr and extended it for 5 years. (Table shows allocation minus 10% held open). R&D incl. \$14 million/yr for RE. Table doesn't incl. \$100 million/yr. EE by Power Authorities.								
		mills/kWh		26.0	87.0	14.0			
		% rev.		0.30	1.02	0.26	March04 law signed requiring 5% by 2006 escalating to 10% by 2011	Required for fuel mix and emissions.	
		admin.		0.23	0.75	0.19			
				NYSERDA	NYSERDA				
Ohio	Restructuring Law (SB3) signed in July 1999. Includes an SBC for up to \$15 million/yr. for an "Energy Eff. Revolving Loan Fund" admin. by the state, plus a "Universal Service Rider" for LI bill asst. and efficiency. LI in table based on recent historical spending. (EE does not incl. addit. agreements by indiv. utilities.)								
		mills/kWh		15.0	100.0	115.0			
		% rev.		0.13	0.84	0.97	None.	Fuel mix and emissions disclosure is required.	
		admin.		0.15	1.1	1.25			
				State	State				

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Oregon	Law passed in July 1999. Includes a "public purpose charge" to fund EE, RI and LI, equiv. to 3% of total IOU revenues (approx. \$60 million). Requires 67% of funds for EE (incl. MT) and 17% to RE. PUC to develop rules. LI gets 15% of PPC for weatherization, plus extra \$10 million for bill payment assistance (incl. in table totals).	Details of SBC Funding				Renewables Portfolio Standard			Generation Disclosure
		R&D	EE	LI	RE	Total	None.	Fuel mix and emissions disclosure is required.	
		million \$	40.0	20.0	10.0	70.0			
		mills/kWh	1.26	0.63	0.31	2.2			
		% rev.	2.0	1.0	0.50	3.5			
		admin.	ETO	State	ETO				
Pennsylvania	In Dec96, a restructuring law was signed with retail access to be phased-in over 2 yrs. starting Jan99. The restructuring law resulted in PUC-approved restructuring settlement agreements for each electric company. Each settlement agreement created a system benefits fund for LI programs and a Sustainable Energy Fund (except for Duquesne)	Details of SBC Funding				Renewables Portfolio Standard			Generation Disclosure
		R&D	EE	LI	RE	Total	None.	Fuel mix is required (but not emissions data.)	
		million \$	5.0	85.0	6.0	96.0			
		mills/kWh	0.04	0.60	0.05	0.69			
		% rev.	0.05	0.9	0.06	1.0			
		admin.	SEF	Utility	SEF				
Rhode Island	Retail competition phased in by Jan98. The legislation required a minimum SBC of 2.3 mills per kWh for EE and RE. Actual spending plans exceeded that. Some funding on R&D for "near commercialization" renewables. Low-income EE and rate discounts are funded in rates, not the SBC. In July 2001, the 2.3 mills minimum SBC was extended for 5 more years.	Details of SBC Funding				Renewables Portfolio Standard			Generation Disclosure
		R&D	EE	LI	RE	Total	None.	Participant of NE Disclosure Project.	
		million \$	15.2	in rates	in	15.2			
		mills/kWh	2.3	in rates	EE	2.3			
		% rev.	2.3	in rates	EE	2.3			
		admin.	Utility	Utility	State				
Texas	Restructuring Law signed in June 1999. Requires utilities to administer EE programs to achieve savings equivalent to 10% of annual load growth by 2004. PUC has established rates and procedures. Est. total annual cost is \$80 million by 2003. Also a small SBC for customer educ. and LI assistance & 10% LI rate discount. (Has been set at statutory maximum .65 mills/kWh.)	Details of SBC Funding				Renewables Portfolio Standard			Generation Disclosure
		R&D	EE	LI	RE	Total	Requires 2000 MW of new renewables by 2009. (Phase-in, 400 MW by 2003.)	Aug01 PUCT Rule \$25.476 requires fuel mix and environmental impact disclosure.	
		million \$	80.0	157.0		237.0			
		mills/kWh	0.33	0.65		1.00			
		% rev.	0.55	1.10		1.65			
		admin.	Utility	PUCT					
Vermont	VT has not yet restructured, but in June 1999, S.137 passed, giving PSB the authority to establish an SBC to fund statewide EE thru a non-utility entity, in place of utility programs. \$17.5 million/yr maximum. 5-year ramp-up budget was set in settlement, averages shown in table. EVT = Efficiency Vermont.	Details of SBC Funding				Renewables Portfolio Standard			Generation Disclosure
		R&D	EE	LI	RE	Total	None.	S62 required price, mix, pollutants, EE notices, and terms. NE Disclosure Proj.	
		million \$	17.5	in	EE	17.5			
		mills/kWh	2.9	EE		2.9			
		% rev.	3.4	EVT	EVT	3.4			
		admin.	EVT	EVT					
Wisconsin	Act 9 of 1999 passed Sept. 99 includes elec. Reliability provisions which designate the WI Dept. of Admin. as the state agency to design and implement public benefit programs. Industry restructuring has not yet been addressed. Totals in the table reflect best estimate of funding levels when fully in place.	Details of SBC Funding				Renewables Portfolio Standard			Generation Disclosure
		R&D	EE	LI	RE	Total	Requires 0.5% by 12/31/2001. Increases biennially to 2.2% by 12/31/2011.	Not addressed.	
		million \$	2.2	62.0	46.0	115.2			
		mills/kWh	0.0	1.15	0.85	2.14			
		% rev.	0.08	2.3	1.73	4.3			
		admin.	DOA	DOA	DOA	DOA			

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