

1. Accenture
2. Advanced Energy
3. Alectra Utilities
4. Ally Energy Solutions
5. Alternative Energy Systems Consulting
6. Ameren
7. American Public Power Association
8. Apex Analytics
9. Apogee Interactive
10. Applied Energy Group
11. APTIM
12. Aquanta
13. Arizona Public Service
14. Armada Power
15. Austin Energy
16. Baltimore Gas and Electric
17. Benton PUD
18. Berkshire Hathaway Energy
19. Black & Veatch Management Consulting
20. Bonneville Power Administration
21. Bowen Capital Advisors
22. Bristol Tennessee Essential Services
23. Cadmus
24. Calico Energy
25. Central Electric Cooperative
26. Central Hudson Gas & Electric
27. Chelan PUD
28. City of Tallahassee Utilities
29. Clean Power Research
30. CLEAResult
31. Cobb EMC
32. COI Energy Services
33. Commonwealth Edison
34. Con Edison
35. Connected Energy
36. Connected Energy Limited
37. Consumers Energy Company
38. Contract Callers
39. Copper Labs
40. CPower Energy Management
41. CPS Energy
42. Customized Energy Solutions
43. Dairyland Power Cooperative
44. DemandQ
45. DNV GL
46. DTE Energy
47. Duke Energy
48. E Source
49. E4TheFuture
50. Eaton
51. ecobee
52. Edison Electric Institute
53. Efficiency Vermont
54. EFI
55. EGM
56. Elocity
57. Emerson Commercial & Residential Solutions
58. EMI Consulting
59. Enbala
60. Encycle
61. Enel X
62. Energy Solutions
63. EnergyHub
64. EnerVision
65. Entergy
66. EPRI
67. ERS
68. Evergy
69. Eversource
70. Extensible Energy
71. FirstEnergy
72. FleetCarma
73. FPL
74. Franklin Energy
75. GDS Associates
76. Generac
77. Georgia Power Company
78. Google (Nest)
79. Great River Energy
80. GridBeyond
81. GridFabric
82. GridOptimize
83. GridPoint
84. Guidehouse
85. Hawaiian Electric Company
86. High West Energy
87. Honeywell Smart Energy
88. ICF
89. Idaho Power
90. IGS Energy
91. Illume Advising
92. Indianapolis Power & Light Co.
93. Integral Analytics
94. IPKeys Power Partners
95. Itron
96. Jackson EMC
97. Kiwi Power
98. Leap
99. Mitsubishi Electric TRANE HVAC
100. Modesto Irrigation District
101. National Grid
102. National Rural Electric Cooperative
103. NB Power
104. New Braunfels Utilities
105. New Hampshire Electric Cooperative
106. New York Power Authority
107. Nexant
108. North Carolina Electric Membership Corporation
109. NTC
110. OATI
111. Oklahoma Gas & Electric
112. Olivine
113. Oncor Electric Delivery
114. Open Systems International
115. OpenADR Alliance
116. Opinion Dynamics
117. Opus One
118. Oracle Utilities
119. Orange and Rockland Utilities
120. Pacific Gas & Electric
121. Packetized Energy
122. PECO, An Exelon Company
123. Pepco, an Exelon Company
124. Portland General Electric
125. Powerley
126. Public Service Company of Oklahoma
127. RacePoint Energy
128. Rappahannock Electric Cooperative
129. Resideo
130. RF Demand Solutions
131. Sacramento Municipal Utility District
132. Saint John Energy
133. Salt River Project
134. San Diego Gas & Electric
135. Santee Cooper
136. Schneider Electric
137. Scope Services
138. Seattle City Light
139. Shifted Energy
140. Smart Electric Power Alliance
141. Smartenit
142. Snohomish County PUD
143. Southern California Edison
144. Southern California Gas Company
145. Steffes
146. Sunverge Energy
147. Swell Energy
148. Tantalus
149. Tennessee Municipal Electric Power Association
150. Tennessee Valley Authority
151. Tetra Tech
152. The Brattle Group
153. Threshold
154. Tierra Resource Consultants
155. TRC
156. Tri-State Generation & Transmission
157. Trickle Star
158. TROVE
159. Tucson Electric Power
160. Uplight
161. Utility Load Management Exchange
162. Vectren, A Centerpoint Company
163. Warranty Design
164. Waseda University
165. West Monroe Partners
166. Xcel Energy
167. Zen Ecosystems
168. Zeuthen Management Solutions



2021 Energy Trends to Watch



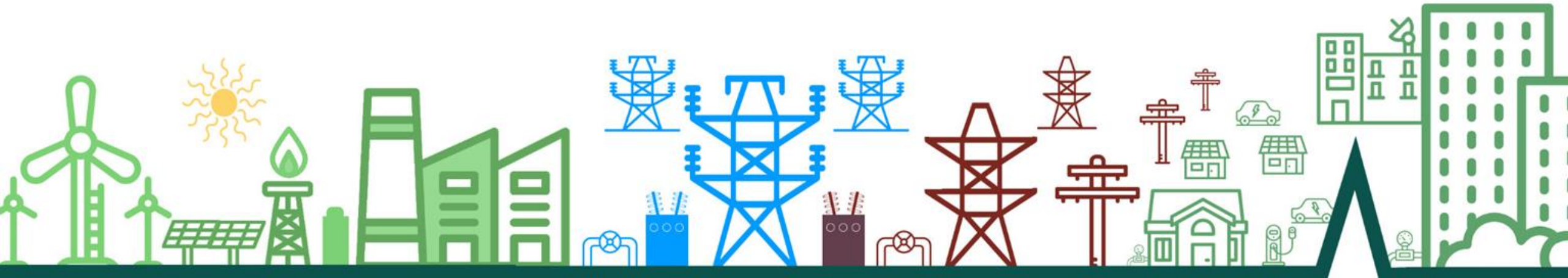
Michael Brown
PLMA Board Chair +
NV Energy



Catherine Morehouse
Reporter
Utility Dive

Top Trends Utility Dive is Watching in 2021

Catherine Morehouse, Utility Dive Reporter



#1: Changes under the Biden Administration

- Strengthened calls for electrification
 - Biden has already called for transitioning the federal vehicle fleet to 100% electric (predicted to take a decade or more)
 - That call is expected to have “enormous impact” on the EV market, analysts say
- Clean energy acceleration
 - Biden already has called for the U.S. to double offshore wind capacity
 - Battery storage, solar, other resources could all see a boost
- Potential transmission overhaul
 - Executive orders called for greater transmission investment
- Questions linger about DOE’s role
 - Advocates hoping to see action on efficiency lags

#2: A New FERC

- Chairman Richard Glick has promised to be bullish on transmission and lowering barriers to new resources
- Order 2222 implementation this summer
- Potential transmission overhaul stemming from FERC
- Future of minimum offer price rule expansion in PJM up in the air
- Watching New York to see if NYISO is able to move on carbon price after commission's policy statement



#3: Electrification

- Outside the Biden admin, EVs expected to increase market share dramatically
- Available models are expected to triple in the next three years, from roughly 40 to 127
- More vehicles getting in the mix -- trucks, school buses, corporate delivery
- New Jersey passed EV incentives last year, pursuing states like California, New York, and Massachusetts
- Meanwhile, around 30 cities in California have passed building codes intended to reduce use of gas and integrate more electric infrastructure
- Will likely see these increase as more states and cities focus on economy-wide emissions reductions

#4: Distributed Energy Resources

- Projected to hit 400 GW by 2025
- Virtual Power Plants growing in relevance
 - Utilities more interested in investing in DERs/distributed energy resource management systems
- Utilities may pursue more resource portfolios, vs. centralized generators
 - Similar to what New Mexico regulators approved last year -- a 100% renewables + storage portfolio to replace a portion of the San Juan coal plant



#5: The Evolving Utility Business Model

- Hawaii regulators approved plan to move Hawaii Electric permanently away from **Cost-of-Service regulation**, toward **Performance-Based Ratemaking**
 - Rewards utilities for adding renewables faster than planned, streamlining DER interconnection, expanding energy efficiency and more
 - Stakeholders say it could be a catalyst for other state regulatory proceedings



#5: COVID-19 Recovery

- Solar took a slight dip in installations in 2020 but bounced back in Q3. Overall, renewables projects saw some delays, but PTC/ITC extension under stimulus should help
- Question on how or whether shifted load patterns bounce back this year, after drop in commercial and industrial loads, rise in residential
- Largely “normal” overall consumption, but may be some recovery in renewables sectors



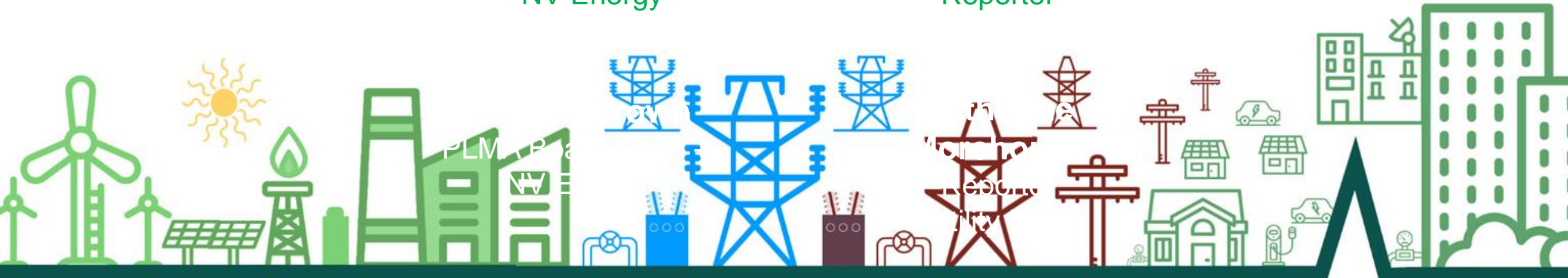
2021 Energy Trends to Watch



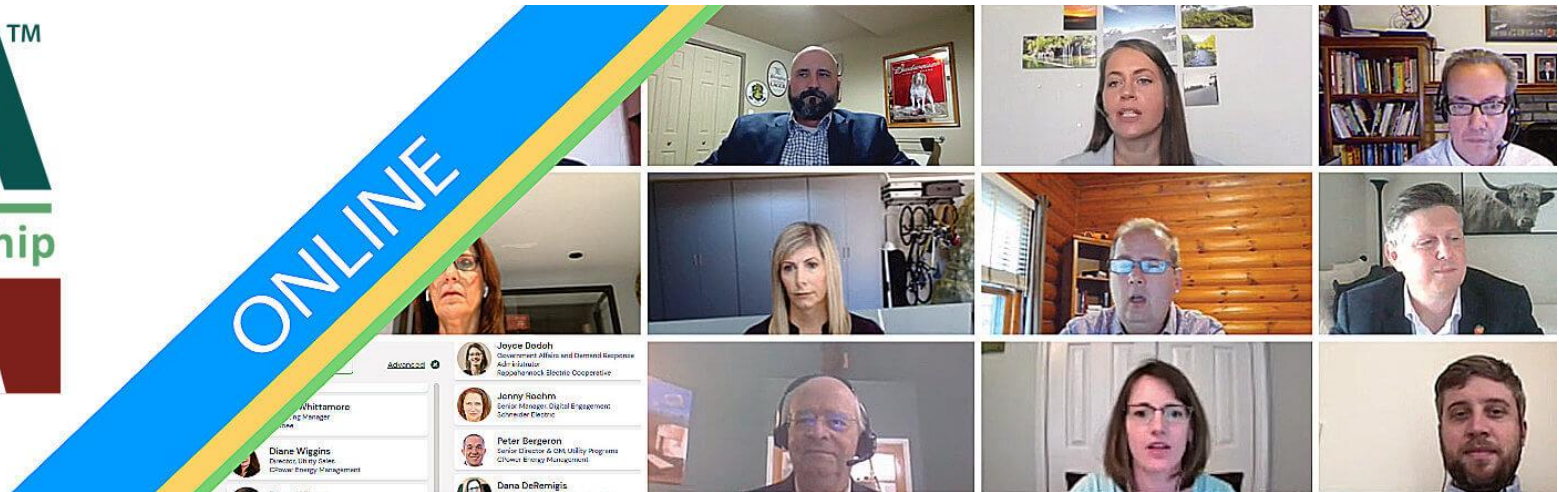
Michael Brown
PLMA Board Chair +
NV Energy



Catherine Morehouse
Reporter



Take a Look at the 43rd PLMA Conference Agenda



Registration has Opened!
www.peakload.org/43rd-conference

