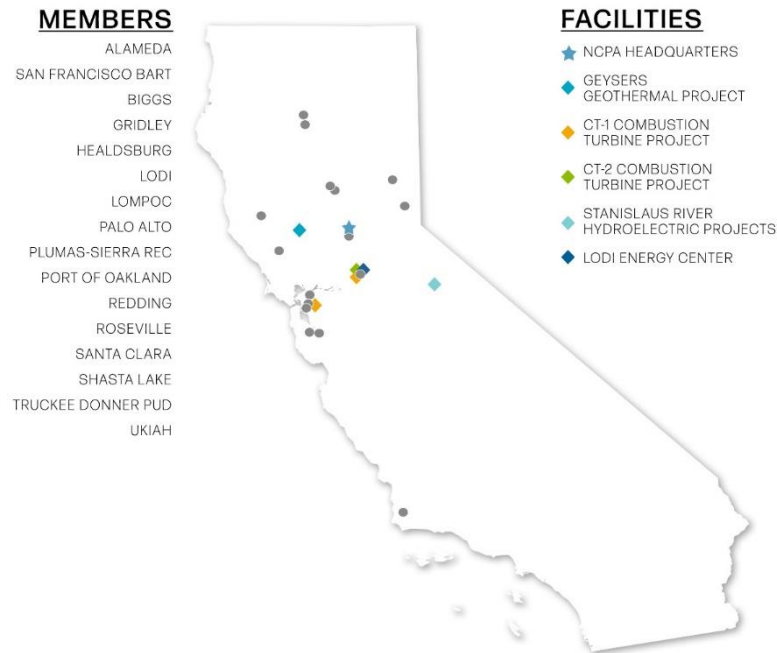




# Clean Energy Future ....

Randy S Howard, General  
Manager - NCPA

## •NCPA Overview



•Established in 1968

- California Joint Powers Agency
- 15 Members and 1 associate Member serving 700,000 residents in communities throughout Northern California (city-owned and special districts)
- Builds and operates jointly owned power plants and operates a power pool for Members
- Represents Members before legislative and regulatory bodies
- Provides Power Management Services to non-Members, including Community Choice Aggregators (CCAs)

## Finding Focus

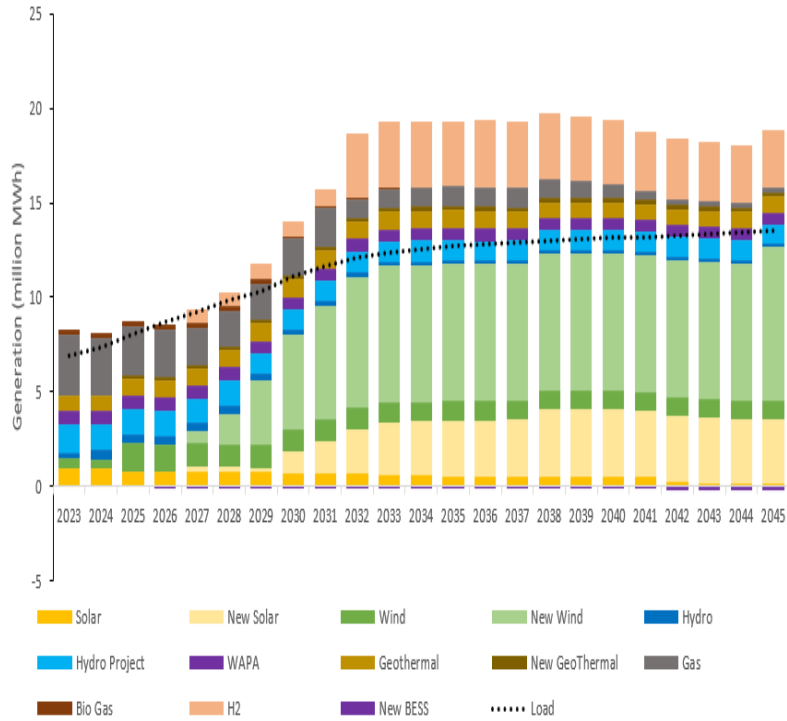
- What is our greatest liability and risk?
  - Wildfires and Climate Disasters
- How do we keep the lights on for our customers?
  - Short Term (Now – 2026)
  - Transition Period (2027 – 2030)
  - Long Term (2031 – 2045)
- What Assumptions do we make?
  - SB 100 Renewable Portfolio Standards
  - CEC's IEPR forecast
  - CAISO's Transmission Planning and Interconnection Process
  - RA Methodology Changes (CAISO Regulation Changes)
  - CARB's Scoping Plan
  - Gas Transmission Costs
  - Regionalization Considerations/Risks
  - Resource Retirements (Nuclear and OTC Plants)

## California Wildfire Impacts

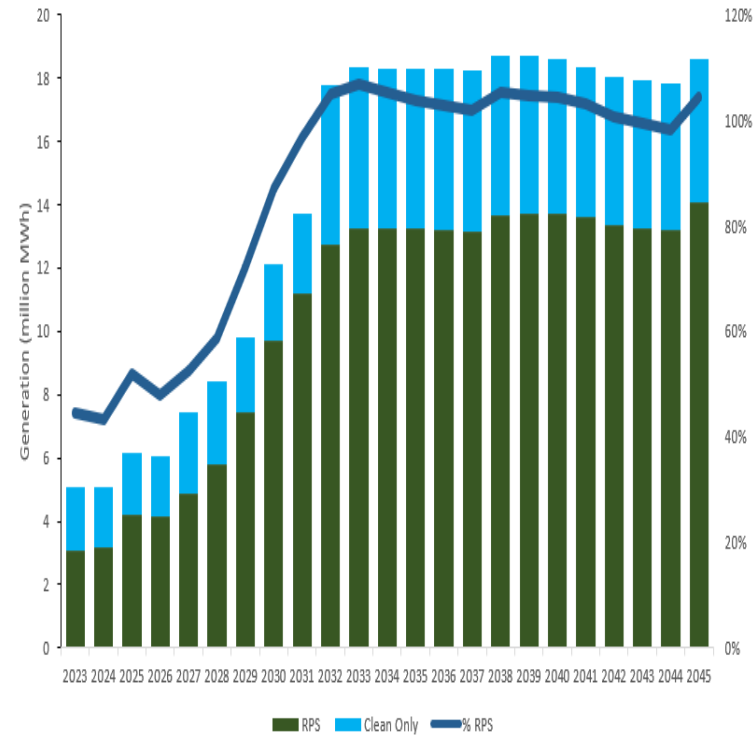
- Electric industry continues to increase its resources on education, wildfire mitigation, detection, response, and recovery.
- Recent CA and national wildfires reinforce the critical importance of our ongoing wildfire efforts.
- The liability risks associated with wildfires is currently the leading threat to our industry and one of the most significant impacts to our costs. The electric utilities have become the insurers of last resort for property owners and it is impacting electric rate affordability
- POUs are not part of AB1054 (wildfire liability backstop fund) and are challenged to find wildfire insurance.
- There is a need for increased urgency and accountability for all stakeholders, including state, federal and local government, private landowners, the insurance industry, and forestry sector that have an obligation to address the wildfire crisis.

# Inter Agency Resource Plan - Results

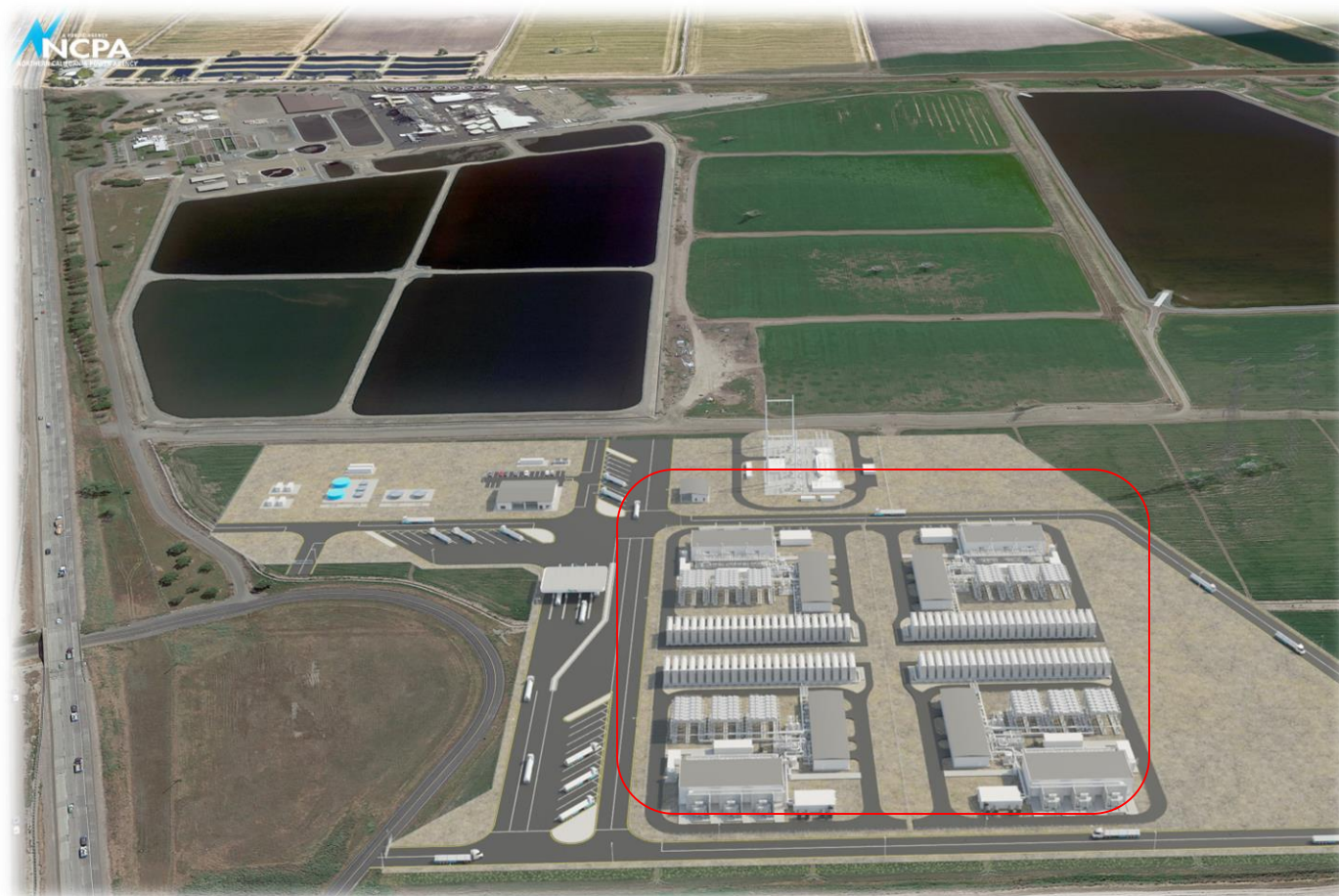
## Energy Position with Added Resources

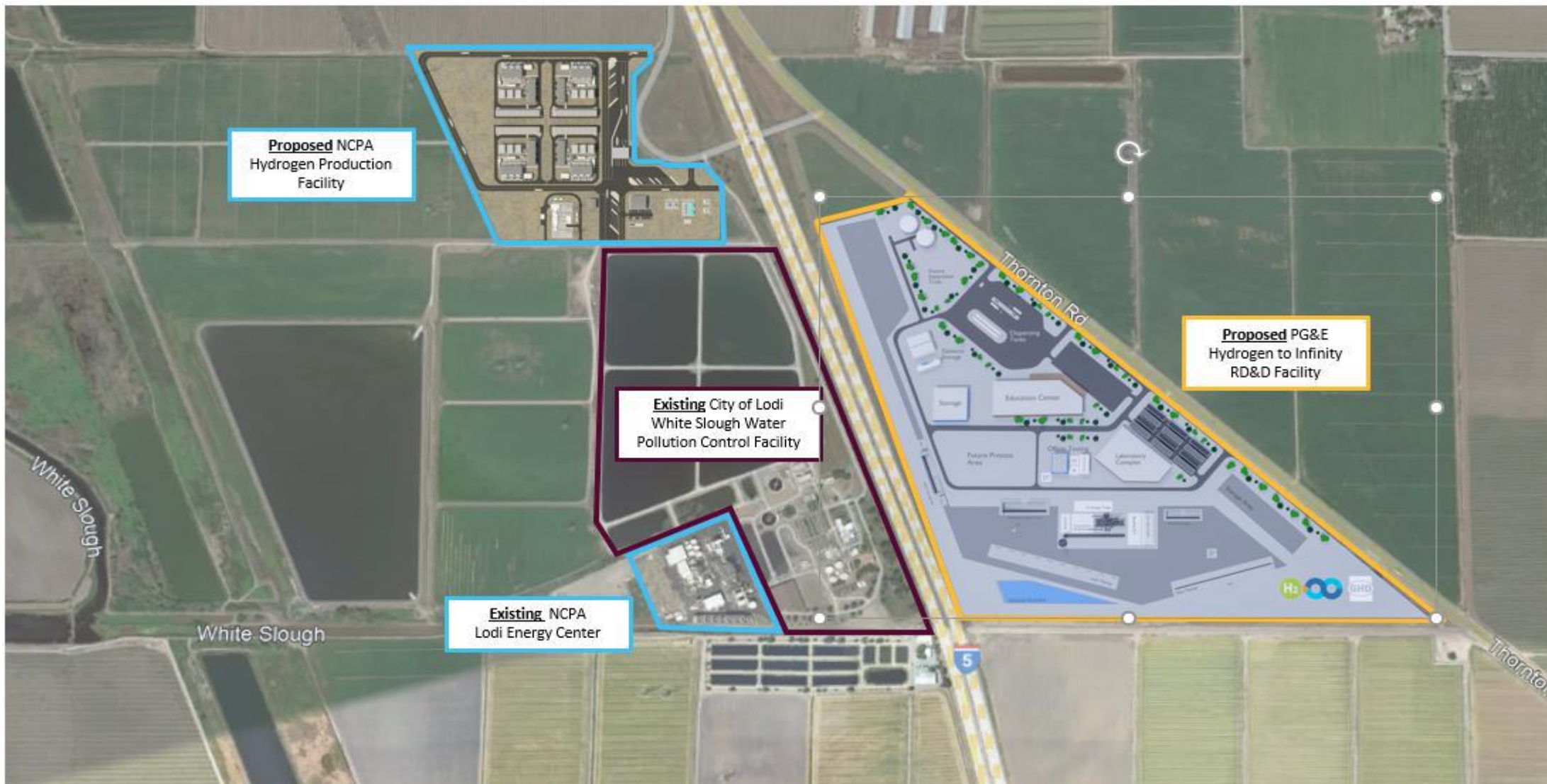


## RPS and Clean Energy Position



# Lodi Energy Center Hydrogen Project





**Proposed** NCPA  
Hydrogen Production  
Facility

**Existing** City of Lodi  
White Slough Water  
Pollution Control Facility

**Existing** NCPA  
Lodi Energy Center

**Proposed** PG&E  
Hydrogen to Infinity  
RD&D Facility

# Hydrogen Transport





# West-wide Pathways Initiative

## Option Evaluation Criteria

1. **Maximized net benefits**, including reliability, affordability and environmental benefits, recognizing startup and ongoing costs, and considering both new benefits and impacts on existing benefits.
2. **Equitable representation** across the Western region and among all market participants, including for a wide range of legal entities.
3. **A governance structure** independent of any single state, participant, or class of participants.
4. **Organizational flexibility** to accommodate future expansion of regional solutions and to create a credible and timely path to a voluntary RTO, including the balancing authority and transmission planning functions.
5. **Optionality** to allow market participants to choose the market services they value.
6. **Preservation** of existing balancing authorities' ability to maintain independence, authority, and governance.
7. **An implementation timeline** that promotes broad market participation.
8. **Respect for state authority** to set procurement, environmental, reliability and other public interest policies.