

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



Pacific Gas & Electric Company
ELC (Corp ID 39)
Status of Advice Letter 4341G/6023E
As of March 1, 2021

Subject: Amend PG&E Electric and Gas Rules 27.1 to Clarify Availability of Energy Usage and Related Data Pursuant to D.14- 05-016

Division Assigned: Energy

Date Filed: 12-11-2020

Date to Calendar: 12-16-2020

Authorizing Documents: D1405016

Disposition:	Accepted
Effective Date:	12-11-2020

Resolution Required: No

Resolution Number: None

Commission Meeting Date: None

CPUC Contact Information:

edtariffunit@cpuc.ca.gov

AL Certificate Contact Information:

Annie Ho

415-973-8794

PGETariffs@pge.com

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



To: Energy Company Filing Advice Letter

From: Energy Division PAL Coordinator

Subject: Your Advice Letter Filing

The Energy Division of the California Public Utilities Commission has processed your recent Advice Letter (AL) filing and is returning an AL status certificate for your records.

The AL status certificate indicates:

- Advice Letter Number
- Name of Filer
- CPUC Corporate ID number of Filer
- Subject of Filing
- Date Filed
- Disposition of Filing (Accepted, Rejected, Withdrawn, etc.)
- Effective Date of Filing
- Other Miscellaneous Information (e.g., Resolution, if applicable, etc.)

The Energy Division has made no changes to your copy of the Advice Letter Filing; please review your Advice Letter Filing with the information contained in the AL status certificate, and update your Advice Letter and tariff records accordingly.

All inquiries to the California Public Utilities Commission on the status of your Advice Letter Filing will be answered by Energy Division staff based on the information contained in the Energy Division's PAL database from which the AL status certificate is generated. If you have any questions on this matter please contact the:

Energy Division's Tariff Unit by e-mail to
edtariffunit@cpuc.ca.gov

December 11, 2020

Advice 4341-G/6023-E

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

Subject: Amend PG&E Electric and Gas Rules 27.1 to Clarify Availability of Energy Usage and Related Data Pursuant to D.14- 05-016

Purpose

Pursuant to Commission Decision No. (D.) 14-05-016, Pacific Gas and Electric Company (PG&E) submits this Tier 1 advice letter to amend PG&E Electric and Gas Rules 27.1 to clarify that energy usage and related data made available to third-parties for specific purposes under the decision will include third-party energy usage and related data in which PG&E is the billing or ratemaking agent of the third-party, such as Community Choice Aggregator (CCA), Direct Access (DA), and Core Transport Agent (CTA) energy usage and related data, solely for the purposes identified in the decision and subject to the privacy and confidentiality protections in the decision.

Background

D.14-05-016 adopted rules that provide access to energy usage and usage-related data to local government entities, researchers, and state and federal agencies when such access is consistent with state law and California Public Utilities Commission (Commission or CPUC) procedures that protect the privacy and confidentiality of the consumer data under the Commission's privacy and confidentiality rules. The decision included a specific Data Request and Release Procedure for disclosure of such energy data, as well as a model Non-Disclosure Agreement to protect the confidentiality and privacy of the data.

PG&E implemented D.14-05-016's data release procedures in its Electric and Gas Rules 27.1.

Since issuance of D.14-05-016 and PG&E Electric and Gas Rules 27.1, a question has arisen as to whether the decision and data release procedure applies to energy usage and related data that PG&E possesses or controls as an agent of third-party energy providers, such as CCAs, DA providers, or CTAs. The purpose of this advice letter is to amend PG&E's Electric and Gas Rules 27.1 to clarify that D.14-05-016's data release

procedures and confidentiality and privacy protections allow and apply to CCA, DA and CTA energy usage and related data requested to be disclosed to third parties in compliance with D.14-05-016.

Tariff Revisions

PG&E proposes to revise its Electric and Gas Rules 27.1 consistent with D.14-05-016 as follows:

Electric Rule 27.1 Amended As Follows (bold italics indicate changes):

Amend the first paragraph to read as follows:

The following rule provides Pacific Gas and Electric Company's (PG&E's) policies and procedures governing access to energy usage and usage-related data by eligible academic researchers, local government entities, and state and federal agencies ("Third Parties") adopted as Attachment A to California Public Utilities Commission Decision (D.) 14-05-016. ***For the purposes of this rule, "energy usage and usage-related data" includes energy usage and usage-related data related to PG&E's retail customers and data related to customers of third party retail load serving entities for which PG&E acts as agent for the purposes of collecting the data or billing or metering the customers.***

Amend section 5 of the rule to read as follows:

5. Privacy and Information Security Laws

- a. Nothing in this process requires or authorizes PG&E or a third-party to violate any existing privacy or information security laws, rules or orders, including the Commission's privacy rules. Nothing in this process requires or authorizes PG&E or a third-party to transfer, sell, or license energy data that consists of PG&E's ***or any third party's*** intellectual property, trade secrets, or competitively-sensitive data. The transfer, sale or licensing of such intellectual property, trade secrets and competitively sensitive data will be subject to Commission review and approval consistent with existing ***laws and*** Commission rules and orders regarding the sale, transfer or licensing of utility assets.

Gas Rule 27.1 Amended As Follows (bold italics indicate changes)

Amend the first paragraph to read as follows:

The following rule provides Pacific Gas and Electric Company's (PG&E's) policies and procedures governing access to energy usage and usage-related data by

eligible academic researchers, local government entities, and state and federal agencies ("Third Parties") adopted as Attachment A to California Public Utilities Commission Decision (D.) 14-05-016. ***For the purposes of this rule, "energy usage and usage-related data" includes energy usage and usage-related data related to PG&E's retail customers and data related to customers of third party retail load serving entities for which PG&E acts as agent for the purposes of collecting the data or billing or metering the customers.***

Amend Section 5 of the rule to read as follows:

5. Privacy and Information Security Laws

- a. Nothing in this process requires or authorizes PG&E or a third-party to violate any existing privacy or information security laws, rules or orders, including the Commission's privacy rules. Nothing in this process requires or authorizes PG&E or a third-party to transfer, sell, or license energy data that consists of PG&E's ***or any third party's*** intellectual property, trade secrets, or competitively-sensitive data. The transfer, sale or licensing of such intellectual property, trade secrets and competitively-sensitive data will be subject to Commission review and approval consistent with existing ***laws and*** Commission rules and orders regarding the sale, transfer or licensing of utility assets.

For your convenience, redline versions of the tariff revisions are included as Attachment 2.

The submittal would not increase any current rate or change, cause the withdrawal of service, or conflict with any rate reschedule or rule.

Protests

*****Due to the COVID-19 pandemic and the shelter at home orders, PG&E is currently unable to receive protests or comments to this advice letter via U.S. mail or fax. Please submit protests or comments to this advice letter to EDTariffUnit@cpuc.ca.gov and PGETariffs@pge.com*****

Anyone wishing to protest this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than December 31, 2020, which is 20 days after the date of this submittal. Protests must be submitted to:

CPUC Energy Division
ED Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, California 94102

Facsimile: (415) 703-2200
E-mail: EDTariffUnit@cpuc.ca.gov

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

The protest shall also be sent to PG&E either via E-mail or U.S. mail (and by facsimile, if possible) at the address shown below on the same date it is mailed or delivered to the Commission:

Erik Jacobson
Director, Regulatory Relations
c/o Megan Lawson
Pacific Gas and Electric Company
77 Beale Street, Mail Code B13U
P.O. Box 770000
San Francisco, California 94177

Facsimile: (415) 973-3582
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name, telephone number, postal address, and (where appropriate) e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

Effective Date

PG&E requests that this Tier 1 advice submittal become effective upon date of submittal, which is December 11, 2020.

Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically and via U.S. mail to parties shown on the attached list and the parties on the service list for R.18-12-006, R.08-12-009 (Phase 3), R.03-10-003, A.13-12-012, A.17-11-009, and R.19-03-009. Address changes to the General Order 96-B service list

should be directed to PG&E at email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission's Process Office at (415) 703-2021 or at Process_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

/S/

Erik Jacobson
Director, Regulatory Relations

Attachments

Attachment 1 – Tariffs
Attachment 2 – Redline Tariffs

cc: Service list for A.18-12-009, R.08-12-009 (Phase 3), R.03-10-003, A.13-12-012, A.17-11-009, and R.19-03-009



ADVICE LETTER SUMMARY

ENERGY UTILITY



MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Pacific Gas and Electric Company (ID U39 M)

Utility type:

☒ ELC ☒ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Annie Ho

Phone #: (415) 973-8794

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: AMHP@pge.com

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 4321-G/6023-E

Tier Designation: 1

Subject of AL: Amend PG&E Electric and Gas Rules 27.1 to Clarify Availability of Energy Usage and Related Data
Pursuant to D.14-05-016

Keywords (choose from CPUC listing): Compliance

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.14-05-016

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? ☐ Yes ☒ No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? ☐ Yes ☒ No

Requested effective date: 12/11/20

No. of tariff sheets: 10

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: See Attachment 1

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: N/A

¹Discuss in AL if more space is needed.

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name: Erik Jacobson, c/o Megan Lawson
Title: Director, Regulatory Relations
Utility Name: Pacific Gas and Electric Company
Address: 77 Beale Street, Mail Code B13U
City: San Francisco, CA 94177
State: California Zip: 94177
Telephone (xxx) xxx-xxxx: (415)973-2093
Facsimile (xxx) xxx-xxxx: (415)973-3582
Email: PGETariffs@pge.com

Name:
Title:
Utility Name:
Address:
City:
State: District of Columbia Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Clear Form

Cal P.U.C. Sheet No.	Title of Sheet	Cancelling Cal P.U.C. Sheet No.
48030-E	ELECTRIC RULE NO. 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data Sheet 1	34311-E
48031-E	ELECTRIC RULE NO. 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data Sheet 2	34312-E
48032-E	ELECTRIC RULE NO. 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data Sheet 4	34314-E
48033-E	ELECTRIC TABLE OF CONTENTS Sheet 1	47901-E
48034-E	ELECTRIC TABLE OF CONTENTS Sheet 20	47782-E

Cal P.U.C. Sheet No.	Title of Sheet	Cancelling Cal P.U.C. Sheet No.
36642-G	GAS RULE NO. 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data Sheet 1	31387-G
36643-G	GAS RULE NO. 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data Sheet 2	31388-G
36644-G	GAS RULE NO. 27.1 Access to Energy Usage and Usage-Related Data While Protecting Privacy of Personal Data Sheet 4	31390-G
36645-G	GAS TABLE OF CONTENTS Sheet 1	36640-G
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ELECTRIC RULE NO. 27.1

Sheet 1

**Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data**

The following rule provides Pacific Gas and Electric Company's (PG&E's) policies and procedures governing access to energy usage and usage-related data by eligible academic researchers, local government entities, and state and federal agencies ("Third Parties") adopted as Attachment A to California Public Utilities Commission Decision (D.) 14-05-016. For the purposes of this rule, "energy usage and usage-related data" includes energy usage and usage-related data includes data related to PG&E's retail customers and data related to customers of third party retail load serving entities for which PG&E acts as agent for the purposes of collecting the data or billing or metering the customers.

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A. DATA REQUEST AND RELEASE PROCESS

1. PG&E Responsibilities

- a. PG&E will provide a single point-of-contact (POC) for filing and processing third-party energy usage data requests.
- b. The single POC will include a single email mailbox or website and other contact information to which requests for energy data access may be transmitted.
- c. The single POC information will be provided prominently and conveniently on PG&E's website.
- d. PG&E's website will provide access to an electronic input form for third-parties to request energy data access.
- e. PG&E's website is expected to eventually include a Data Catalog of energy data access requests made, fulfilled, and/or denied. New requests for data that have previously been received and fulfilled can easily be made available to eligible third-parties. PG&E will provide data without charge, but may record costs in a memorandum account and subsequently seek recovery via an application or general rate proceeding.
- f. Within one business day of receiving a request form, from a third-party requesting access to energy data, PG&E will respond by email or in writing acknowledging and confirming receipt of the request.
- g. Within seven business days of receiving a request form from a third-party for access to energy data, PG&E will respond by email or in writing regarding whether the information on the form is complete and, if incomplete, what additional information is required for PG&E to process the request.

(L)
(L)

(Continued)



ELECTRIC RULE NO. 27.1

Sheet 2

Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data

A. DATA REQUEST AND RELEASE PROCESS (Cont'd)

1. PG&E Responsibilities (Cont'd) (L)
 - h. Within 15 business days of receiving a complete request for access to energy data from a third-party, PG&E will respond by email or in writing regarding whether it is able to grant the request, and provide a proposed schedule for providing the requested data. If PG&E responds that it cannot grant access to the data, it will provide specific reasons why it cannot provide the data or offer other options for providing data access (such as providing data listed in the Data Catalog or suggesting modifications to the request such that it could be granted). If the requesting party disagrees with PG&E's rejection of its request for data access or the alternative options offered by PG&E, the third-party may bring the dispute for informal discussion before the Energy Data Access Committee established below in Section 4. (L)
2. Non-Disclosure Agreement
 - a. Prior to receiving access to energy data, the requesting party will execute a standard non-disclosure agreement (Form 79-1166) if required by PG&E as directed by D.14-05-016 (Section 7.2), with substantially consistent terms and conditions among PG&E, SCE, SDG&E, and SoCalGas. In addition, if a pre-disclosure review of the third-party's information security and privacy controls and protections is recommended by PG&E, the recommendations will be substantially consistent among PG&E, SCE, SDG&E, and SoCal Gas and published in advance and available on the utilities' websites.
3. Terms of Service
 - a. Local governments receiving aggregated and anonymous data need not sign a non-disclosure agreement but must accept the following terms of service (Form 79-1167):
 - 1) The party will use the data for the purposes stated in the request.
 - 2) The party will not release the data to another third party or publicly disclose the data.
 - 3) Prior to the release of any data to a requesting local government PG&E will inform the Executive Director of the Commission via a formal letter four weeks in advance of the proposed transfer. The letter shall contain the following information:
 - a) The purpose identified by the party requesting data.
 - i. A description of the data requested and to be released.

(Continued)



ELECTRIC RULE NO. 27.1

Sheet 4

Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data

A. DATA REQUEST AND RELEASE PROCESS (Cont'd)

4. The Energy Data Access Committee (Cont'd)

- b. If a party does not accept the recommendation of the Energy Data Access Committee, that party maintains full rights to request a formal consideration of the matter by the Commission via the Commission's petition process. If the Access Committee recommends against providing access to the data requested by a third-party, that party may file a petition with the Commission seeking clarification of access rules. If the Access Committee recommends providing access to the data and a utility declines to follow the recommendation, PG&E should similarly file a petition seeking clarification of Commission policies concerning whether that particular request is consistent with Commission policies and privacy laws.

5. Privacy and Information Security Laws

- a. Nothing in this process requires or authorizes PG&E or a third-party to violate any existing privacy or information security laws, rules or orders, including the Commission's privacy rules. Nothing in this process requires or authorizes PG&E or a third-party to transfer, sell, or license energy data that consists of PG&E's or any third-party intellectual property, trade secrets, or competitively-sensitive data. The transfer, sale or licensing of such intellectual property, trade secrets and competitively-sensitive data will be subject to Commission review and approval consistent with existing laws and Commission rules and orders regarding the sale, transfer or licensing of utility assets. (T)

6. Standardized Data Output and Delivery

- a. All data outputs will be in standard formats. Data will be accessible in specified formats such as comma-delimited, XML, or other agreed-upon formats. Customized outputs or formats should be avoided. The Energy Data Access Committee can review formats annually to ensure that the utilities are consistent with current technology trends for data sharing formats.
- b. Mechanisms for handling data delivery for request of all sizes in a secure manner should be standardized. To the extent possible, PG&E will provide data through the customer data access program adopted in D. 13-09-025. Some requests may be very small and require very little effort to transmit or deliver. Others could be gigabytes in size. In addition, sensitive customer information or other information subject to protections will be transmitted to the third party with reasonable encryption. By standardizing delivery mechanisms, PG&E and third-parties will provide pre-approved delivery methods for sensitive information, reducing risk as well as the time to transmit and receive the data.

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GAS RULE NO. 27.1

Sheet 1

**Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data**

The following rule provides Pacific Gas and Electric Company's (PG&E's) policies and procedures governing access to energy usage and usage-related data by eligible academic researchers, local government entities, and state and federal agencies ("Third Parties") adopted as Attachment A to California Public Utilities Commission Decision (D.) 14-05-016. For the purposes of this rule, "energy usage and usage-related data" includes energy usage and usage-related data includes data related to PG&E's retail customers and data related to customers of third party retail load serving entities for which PG&E acts as agent for the purposes of collecting the data or billing or metering the customers.

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A. DATA REQUEST AND RELEASE PROCESS

1. PG&E Responsibilities

- a. PG&E will provide a single point-of-contact (POC) for filing and processing third-party energy usage data requests.
- b. The single POC will include a single email mailbox or website and other contact information to which requests for energy data access may be transmitted.
- c. The single POC information will be provided prominently and conveniently on PG&E's website.
- d. PG&E's website will provide access to an electronic input form for third-parties to request energy data access.
- e. PG&E's website is expected to eventually include a Data Catalog of energy data access requests made, fulfilled, and/or denied. New requests for data that have previously been received and fulfilled can easily be made available to eligible third-parties. PG&E will provide data without charge, but may record costs in a memorandum account and subsequently seek recovery via an application or general rate proceeding.
- f. Within one business day of receiving a request form, from a third-party requesting access to energy data, PG&E will respond by email or in writing acknowledging and confirming receipt of the request.
- g. Within seven business days of receiving a request form from a third-party for access to energy data, PG&E will respond by email or in writing regarding whether the information on the form is complete and, if incomplete, what additional information is required for PG&E to process the request.

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(Continued)

Advice	4341-G	Issued by	Submitted	December 11, 2020
Decision	14-05-016	Robert S. Kenney	Effective	December 11, 2020
		Vice President, Regulatory Affairs	Resolution	



GAS RULE NO. 27.1

Sheet 2

Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data

A. DATA REQUEST AND RELEASE PROCESS (Cont'd)

1. PG&E Responsibilities (Cont'd) (L)
 - h. Within 15 business days of receiving a complete request for access to energy data from a third-party, PG&E will respond by email or in writing regarding whether it is able to grant the request, and provide a proposed schedule for providing the requested data. If PG&E responds that it cannot grant access to the data, it will provide specific reasons why it cannot provide the data or offer other options for providing data access (such as providing data listed in the Data Catalog or suggesting modifications to the request such that it could be granted). If the requesting party disagrees with PG&E's rejection of its request for data access or the alternative options offered by PG&E, the third-party may bring the dispute for informal discussion before the Energy Data Access Committee established below in Section 4. (L)
2. Non-Disclosure Agreement
 - a. Prior to receiving access to energy data, the requesting party will execute a standard non-disclosure agreement (Form 79-1166) if required by PG&E as directed by D.14-05-016 (Section 7.2), with substantially consistent terms and conditions among PG&E, SCE, SDG&E, and SoCalGas. In addition, if a pre-disclosure review of the third-party's information security and privacy controls and protections is recommended by PG&E, the recommendations will be substantially consistent among PG&E, SCE, SDG&E, and SoCal Gas and published in advance and available on the utilities' websites.
3. Terms of Service
 - a. Local governments receiving aggregated and anonymous data need not sign a non-disclosure agreement but must accept the following terms of service (Form 79-1167):
 - 1) The party will use the data for the purposes stated in the request.
 - 2) The party will not release the data to another third party or publicly disclose the data.
 - 3) Prior to the release of any data to a requesting local government PG&E will inform the Executive Director of the Commission via a formal letter four weeks in advance of the proposed transfer. The letter shall contain the following information:
 - a) The purpose identified by the party requesting data.
 - i. A description of the data requested and to be released.

(Continued)



GAS RULE NO. 27.1

Sheet 4

Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data

A. DATA REQUEST AND RELEASE PROCESS (Cont'd)

4. The Energy Data Access Committee (Cont'd)

- b. If a party does not accept the recommendation of the Energy Data Access Committee, that party maintains full rights to request a formal consideration of the matter by the Commission via the Commission's petition process. If the Access Committee recommends against providing access to the data requested by a third-party, that party may file a petition with the Commission seeking clarification of access rules. If the Access Committee recommends providing access to the data and a utility declines to follow the recommendation, PG&E should similarly file a petition seeking clarification of Commission policies concerning whether that particular request is consistent with Commission policies and privacy laws.

5. Privacy and Information Security Laws

- a. Nothing in this process requires or authorizes PG&E or a third-party to violate any existing privacy or information security laws, rules or orders, including the Commission's privacy rules. Nothing in this process requires or authorizes PG&E or a third-party to transfer, sell, or license energy data that consists of PG&E's or any third-party's intellectual property, trade secrets, or competitively-sensitive data. The transfer, sale or licensing of such intellectual property, trade secrets and competitively-sensitive data will be subject to Commission review and approval consistent with existing laws and Commission rules and orders regarding the sale, transfer or licensing of utility assets. (T)

6. Standardized Data Output and Delivery

- a. All data outputs will be in standard formats. Data will be accessible in specified formats such as comma-delimited, XML, or other agreed-upon formats. Customized outputs or formats should be avoided. The Energy Data Access Committee can review formats annually to ensure that the utilities are consistent with current technology trends for data sharing formats.
- b. Mechanisms for handling data delivery for request of all sizes in a secure manner should be standardized. To the extent possible, PG&E will provide data through the customer data access program adopted in D. 13-09-025. Some requests may be very small and require very little effort to transmit or deliver. Others could be gigabytes in size. In addition, sensitive customer information or other information subject to protections will be transmitted to the third party with reasonable encryption. By standardizing delivery mechanisms, PG&E and third-parties will provide pre-approved delivery methods for sensitive information, reducing risk as well as the time to transmit and receive the data.

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Vice President, Regulatory Affairs

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Attachment 2

Redline Tariffs



GAS RULE NO. 27.1

**Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data**

Sheet 1

(N)

(N)

(N)

The following rule provides Pacific Gas and Electric Company's (PG&E's) policies and procedures governing access to energy usage and usage-related data by eligible academic researchers, local government entities, and state and federal agencies ("Third Parties") adopted as Attachment A to California Public Utilities Commission Decision (D.) 14-05-016. **For the purposes of this rule, "energy usage and usage-related data" includes energy usage and usage-related data includes data related to PG&E's retail customers and data related to customers of third party retail load serving entities for which PG&E acts as agent for the purposes of collecting the data or billing or metering the customers.**

(N)

A. DATA REQUEST AND RELEASE PROCESS

1. PG&E Responsibilities

- a. PG&E will provide a single point-of-contact (POC) for filing and processing third-party energy usage data requests.
- b. The single POC will include a single email mailbox or website and other contact information to which requests for energy data access may be transmitted.
- c. The single POC information will be provided prominently and conveniently on PG&E's website.
- d. PG&E's website will provide access to an electronic input form for third-parties to request energy data access.
- e. PG&E's website is expected to eventually include a Data Catalog of energy data access requests made, fulfilled, and/or denied. New requests for data that have previously been received and fulfilled can easily be made available to eligible third-parties. PG&E will provide data without charge, but may record costs in a memorandum account and subsequently seek recovery via an application or general rate proceeding.
- f. Within one business day of receiving a request form, from a third-party requesting access to energy data, PG&E will respond by email or in writing acknowledging and confirming receipt of the request.
- g. Within seven business days of receiving a request form from a third-party for access to energy data, PG&E will respond by email or in writing regarding whether the information on the form is complete and, if incomplete, what additional information is required for PG&E to process the request.
- h. Within 15 business days of receiving a complete request for access to energy data from a third-party, PG&E will respond by email or in writing regarding whether it is able to grant the request, and provide a proposed schedule for providing the requested data. If PG&E responds that it cannot grant access to the data, it will provide specific reasons why it cannot provide the data or offer other options for providing data access (such as providing data listed in the Data Catalog or suggesting modifications to the request such that it could be granted). If the requesting party disagrees with PG&E's rejection of its request for data access or the alternative options offered by PG&E, the third-party may bring the dispute for

(N)

(Continued)



GAS RULE NO. 27.1

Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data

Sheet 4

(N)

(N)

(N)

A. DATA REQUEST AND RELEASE PROCESS (Cont'd)

(N)

4. The Energy Data Access Committee (Cont'd)

- b. If a party does not accept the recommendation of the Energy Data Access Committee, that party maintains full rights to request a formal consideration of the matter by the Commission via the Commission's petition process. If the Access Committee recommends against providing access to the data requested by a third-party, that party may file a petition with the Commission seeking clarification of access rules. If the Access Committee recommends providing access to the data and a utility declines to follow the recommendation, PG&E should similarly file a petition seeking clarification of Commission policies concerning whether that particular request is consistent with Commission policies and privacy laws.

5. Privacy and Information Security Laws

- a. Nothing in this process requires or authorizes PG&E or a third-party to violate any existing privacy or information security laws, rules or orders, including the Commission's privacy rules. Nothing in this process requires or authorizes PG&E or a third-party to transfer, sell, or license energy data that consists of PG&E's or any third party's intellectual property, trade secrets, or competitively-sensitive data. The transfer, sale or licensing of such intellectual property, trade secrets and competitively-sensitive data will be subject to Commission review and approval consistent with existing laws and Commission rules and orders regarding the sale, transfer or licensing of utility assets.

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ELECTRIC RULE NO. 27.1

**Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data**

Sheet 1

(N)

(N)

(N)

The following rule provides Pacific Gas and Electric Company's (PG&E's) policies and procedures governing access to energy usage and usage-related data by eligible academic researchers, local government entities, and state and federal agencies ("Third Parties") adopted as Attachment A to California Public Utilities Commission Decision (D.) 14-05-016. For the purposes of this rule, "energy usage and usage-related data" includes energy usage and usage-related data includes data related to PG&E's retail customers and data related to customers of third party retail load serving entities for which PG&E acts as agent for the purposes of collecting the data or billing or metering the customers.

(N)

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(N)

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ELECTRIC RULE NO. 27.1

Access to Energy Usage and Usage-Related Data
While Protecting Privacy of Personal Data

Sheet 4

(N)

(N)

(N)

A. DATA REQUEST AND RELEASE PROCESS (Cont'd)

(N)

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**PG&E Gas and Electric
Advice Submittal List
General Order 96-B, Section IV**

AT&T
Albion Power Company

Alta Power Group, LLC
Anderson & Poole

Atlas ReFuel
BART

Barkovich & Yap, Inc.
California Cotton Ginners & Growers Assn
California Energy Commission

California Hub for Energy Efficiency
Financing

California Alternative Energy and
Advanced Transportation Financing
Authority
California Public Utilities Commission
Calpine

Cameron-Daniel, P.C.
Casner, Steve
Cenergy Power
Center for Biological Diversity

Chevron Pipeline and Power
City of Palo Alto

City of San Jose
Clean Power Research
Coast Economic Consulting
Commercial Energy
Crossborder Energy
Crown Road Energy, LLC
Davis Wright Tremaine LLP
Day Carter Murphy

Dept of General Services
Don Pickett & Associates, Inc.
Douglass & Liddell

East Bay Community Energy Ellison
Schneider & Harris LLP Energy
Management Service
Engineers and Scientists of California

GenOn Energy, Inc.
Goodin, MacBride, Squeri, Schlotz &
Ritchie
Green Power Institute
Hanna & Morton
ICF
IGS Energy
International Power Technology
Intestate Gas Services, Inc.
Kelly Group
Ken Bohn Consulting
Keyes & Fox LLP
Leviton Manufacturing Co., Inc.

Los Angeles County Integrated
Waste Management Task Force
MRW & Associates
Manatt Phelps Phillips
Marin Energy Authority
McKenzie & Associates

Modesto Irrigation District
NLine Energy, Inc.
NRG Solar

Office of Ratepayer Advocates
OnGrid Solar
Pacific Gas and Electric Company
Peninsula Clean Energy

Pioneer Community Energy

Redwood Coast Energy Authority
Regulatory & Cogeneration Service, Inc.
SCD Energy Solutions
San Diego Gas & Electric Company

SPURR
San Francisco Water Power and Sewer
Semptra Utilities

Sierra Telephone Company, Inc.
Southern California Edison Company
Southern California Gas Company
Spark Energy
Sun Light & Power
Sunshine Design
Tecogen, Inc.
TerraVerde Renewable Partners
Tiger Natural Gas, Inc.

TransCanada
Utility Cost Management
Utility Power Solutions
Water and Energy Consulting Wellhead
Electric Company
Western Manufactured Housing
Communities Association (WMA)
Yep Energy