



Jack E. Jirak
Deputy General Counsel

Mailing Address:
NCRH 20 / P.O. Box 1551
Raleigh, NC 27602

o: 919.546.3257
jack.jirak@duke-energy.com

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VIA ELECTRONIC FILING

Ms. A. Shonta Dunston, Chief Clerk
North Carolina Utilities Commission
Dobbs Building
430 North Salisbury Street
Raleigh, North Carolina 27603

**RE: Reply Comments of Duke Energy Carolinas, LLC and Duke Energy
Progress, LLC
Docket No. E-100, Sub 190**

Dear Ms. Dunston:

Enclosed for filing, in the above-referenced proceeding are the Reply Comments of Duke Energy Carolinas, LLC and Duke Energy Progress, LLC.

If you have any questions, please do not hesitate to contact me. Thank you for your assistance with this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Jack Jirak", written in a cursive style.

Jack E. Jirak

Enclosure

cc: Parties of Record

**STATE OF NORTH CAROLINA
UTILITIES COMMISSION
RALEIGH**

DOCKET NO. E-100, SUB 190

BEFORE THE NORTH CAROLINA UTILITIES COMMISSION

In the Matter of Biennial)	
Consolidated Carbon Plan and Integrated)	REPLY COMMENTS OF DUKE
Resource Plans of Duke Energy Carolinas,)	ENERGY CAROLINAS, LLC
LLC, and Duke Energy Progress, LLC,)	AND DUKE ENERGY
Pursuant to N.C.G.S. § 62-110.9 and § 62-)	PROGRESS, LLC
110.1(c))	
)	

NOW COME Duke Energy Carolinas, LLC (“DEC”) and Duke Energy Progress, LLC (“DEP”) (collectively, the “Companies”), by and through their legal counsel, pursuant to the North Carolina Utilities Commission’s (“Commission”) December 20, 2023, *Order Requesting Comments on Request For Development of Supplemental Portfolios And Adjustment to Procedural Schedule* (the “Order”) and respectfully submit these Reply Comments in support of (1) the Companies’ proposal to perform supplemental modeling and to submit limited additional portfolio analysis and supporting testimony in this proceeding based on the Updated 2023 Fall Load Forecast; and (2) recommended adjustments to the procedural schedule for testimony and the evidentiary hearing in this proceeding.

I. INTRODUCTION

On November 30, 2023, through the Supplemental Direct Testimony of Glen A. Snider, the Companies provided an update to the Commission, the Public Staff – North Carolina Utilities Commission (“Public Staff”), and all intervenors in this docket explaining the substantial, material changes to the Companies’ load forecast that have occurred since preparing their 2023-2024 Carbon Plan and Integrated Resource Plan

(“CPIRP” or the “Plan”). As witness Snider explains, the Companies’ CPIRP relied on the Spring 2023 Load Forecast that was finalized in the first quarter of 2023. Since that time, the Carolinas have experienced continued strong and unprecedented economic development, the pace and scope of which well exceeds the Companies’ historical experience. To put this growth in perspective, the Updated 2023 Fall Load Forecast projects peak demand growth by 2030 of approximately eight times the peak load growth projected in the 2022 Carbon Plan proceeding over the same time horizon. As compared to the 2023 Spring Load Forecast, the Updated 2023 Fall Load Forecast has increased by approximately 2 GW.¹

In the interest of transparency and given the significance of the change, the Companies shared the new load forecast information with the Commission and parties in a timely manner, including by (1) filing Mr. Snider’s Supplemental Direct Testimony even before the Updated 2023 Fall Load Forecast was finalized; (2) sharing the inputs, assumptions, and underlying data to the Updated 2023 Fall Load Forecast through supplemental discovery responses on December 8, 2023; and (3) engaging with the Public Staff and intervenors regarding impacts to the procedural schedule of preparing potential supplemental modeling and limited additional portfolio analysis. In the December 18th letter, the Companies notified the Commission of their intent to perform limited supplemental modeling and submit additional portfolio analysis and supporting testimony to assess the impact of the Updated 2023 Fall Load Forecast on the CPIRP. Attachment 1 to the December 18th letter identified the scope of the Companies’ planned supplemental modeling, which incorporates input received from the Public Staff.

¹ G. Snider Supp. Direct Testimony at 8.

The increase in projected load growth that has resulted in the Updated 2023 Fall Load Forecast is driven by extraordinary circumstances outside of the Companies' control, which they could not reasonably have foreseen when developing the CPIRP. Accordingly, the parties filing comments on whether supplemental modeling is appropriate almost unanimously agree that the magnitude of change warrants supplemental modeling and analysis to inform the Commission's assessment of the proposed CPIRP. The Companies' December 18th letter proposed a reasonable approach to considering the Updated 2023 Fall Load Forecast as part of the Commission's evaluation of the 2023-24 CPIRP through the modeling of limited additional Portfolio Variants and Sensitivity Analysis Portfolios. As the Companies explained in their letter, the supplemental modeling is not intended to supersede or otherwise negate the Companies' robust initial CPIRP filing but will instead provide additional information for the Commission's and the parties' consideration.

After consultation with the Public Staff and other parties regarding the Companies' plans for supplemental modeling and recognizing that parties will need a reasonable opportunity to respond to the supplemental modeling and portfolio analysis, the Companies proposed modifications to extend the anticipated procedural schedule and delay the expert witness hearing in this proceeding:

- April 17, 2024 – Direct testimony of Public Staff and intervenors due;
- May 30, 2024² – Rebuttal testimony of the Companies due; and
- June 17, 2024 – Expert witness hearing begins.

² As addressed by the Public Staff's comments, the December 18th letter included a May 31, 2024 date for the Companies to file rebuttal testimony. This was a typographical error, and the Companies and the Public Staff have agreed upon a proposed rebuttal testimony deadline of May 30, 2024. The Companies do not believe any party will be prejudiced by this change to the previously-filed procedural schedule proposing to limit the period for the Companies to develop rebuttal testimony by one day.

As compared to the schedule contemplated by Commission Rule R8-60A(g), the proposed dates provide an approximately 50-day extension of time for the Public Staff and intervenors to file direct testimony and slightly shortens the period for the Companies to file rebuttal testimony. The Companies also believe that the Commission should consider how the procedural schedule for the CPIRP aligns with the procedural schedule for the Companies' related applications for certificates of public convenience and necessity ("CPCNs") to construct new generating facilities, and the Companies intend to submit further procedural recommendations in this respect in the near future.

The Public Staff supports both the Companies' proposed approach to supplemental modeling as well as the proposed modified procedural schedule and June 17 expert witness hearing date. While there is some disagreement amongst intervenors regarding scope, a majority of the parties recognize that it is imperative for the Commission and the parties to assess the incremental impact of the increased load projections on the Plan. Given the supplemental nature of the Companies' filing and the legislative nature of the resource planning process,³ the Companies' proposed procedural schedule appropriately balances the parties' need for additional time to review information with the Commission's timeline for considering the evidence. The Companies' decision to formally introduce this information and perform supplemental modeling (on a very aggressive timeline) relatively early in the proceeding and well before intervenor testimony will be filed was made in the interest of transparency. Importantly, the intent of supplemental modeling is to ensure an adequate and reliable resource plan for the benefit of existing customers as well as new

³ Order Adopting Initial Carbon Plan and Providing Direction for Future Planning at 15, Docket No. E-100, Sub 179 (Dec. 30, 2022) ("When fulfilling its resource planning duties, the Commission [] acts in a legislative capacity.") (internal citations omitted).

economic development customers locating in the Carolinas. As such, the decision is appropriate and should not be used adversely to either needlessly extend the proceeding or force the Companies to perform analysis on behalf of other parties. The Commission's procedural discretion under its rules, particularly when acting, in part, in its legislative capacity in the context of resource planning, allows the Commission to consider and give appropriate weight to all modeling presented while not rigidly insisting that all analysis be performed at the same point in time or based on the same exact set of facts or assumptions.

For all of these reasons and as explained in more detail below, the Companies respectfully request that the Commission allow them to file the planned supplemental modeling and additional portfolio analysis consistent with the limited scope presented in Attachment A to the December 18th letter, along with supplemental direct testimony, by January 31, 2024, and to adopt the reasonable procedural schedule proposed by the Companies.

II. REPLY COMMENTS

A. The Parties Recognize the Recent Updated 2023 Fall Load Forecast Presents Extraordinary Circumstances and Supports the Need for Supplemental Modeling and Additional Portfolio Analysis

The recent economic development commitments and rapidly increasing load growth occurring in the Carolinas since the CPIRP was initially developed presents unique and extraordinary circumstances that impact the resource plan and portfolio analysis presented in the Companies' CPIRP. In light of these significant, material changes, the parties generally agree that the Updated 2023 Fall Load Forecast necessitates providing the Commission with further modeling and portfolio analysis. As the Public Staff notes, "[t]he increased projections in load in the Updated 2023 Fall Load Forecast will have significant impacts on the need for resources leading up to and beyond HB 951's interim compliance

deadline[.]”⁴ This sentiment—that the material nature of the load forecast change warrants further modeling—is largely shared and undisputed by the parties.⁵ Indeed, with the exception of the North Carolina Attorney General’s Office (“AGO”), each of the 12 other parties to file comments recognized the need for, and, in many cases, expressly support further modeling that incorporates the Updated 2023 Fall Load Forecast.

For its part, the AGO does not outright oppose supplemental modeling, but instead suggests that a mid-proceeding supplement to the CPIRP should only be allowed in “extraordinary circumstances” where the Companies have established by “competent, substantive, and affirmative evidence” the materiality of the increased load forecast.⁶ As the other parties to this proceeding appear to have recognized, the Companies have already presented substantial evidence of “extraordinary circumstances” that warrant further modeling both through witness Snider’s Supplemental Direct Testimony⁷ and in response to the parties’ discovery requests.⁸ Specifically, the Companies provided the detailed load

⁴ Public Staff Comments at 4.

⁵ *See, e.g.*, Carolina Industrial Group for Fair Utility Rates II & the Carolina Industrial Group for Fair Utility Rates III (“CIGFUR”) Letter in Lieu of Comments at 2 (“While the Updated 2023 Load Forecast and the supplemental modeling to be undertaken will undoubtedly create more work for all parties . . . , the only alternative course of action would have been for the Companies to have withheld such significant and materially different load forecast data. It should go without saying that . . . such an alternative course of action would have been entirely unacceptable and inappropriate.”); Walmart Inc. (“Walmart”) Letter in Lieu of Comments at 1 (“While there will always be changes between when modeling is conducted and a hearing is held, this case appears to be unique in light of the materiality of the change in load growth.”); Carolina Utility Customers Association (“CUCA”) Letter in Lieu of Comments at 1 (“CUCA is sympathetic to the premise of Duke’s supplemental filing It makes little sense to engage in a planning effort designed to meet an obsolete target.”).

⁶ AGO Letter in Lieu of Comments at 2.

⁷ G. Snider Supp. Direct Testimony at 12 (“This recent pace of change in projected electric demand associated with economic growth in the Carolinas is something I have not seen in my thirty plus year career. As previously mentioned, these extraordinary circumstances necessitated this update despite the somewhat unique timing from a procedural perspective.”).

⁸ Public Staff Comments at 4 (“[T]he Public Staff agrees with Duke that the significant changes to the load forecast underpinning the Companies’ CPIRP necessitate updated modeling”); CIGFUR Letter in Lieu of Comments at 2 (“Companies should not be penalized for rightly disclosing this information to the

forecast data underlying the Updated 2023 Fall Load Forecast to the parties in discovery on December 8th, and each of the 12 other parties who filed comments on this issue appear to accept that the Companies' supplemental testimony and supporting Updated 2023 Fall Load Forecast demonstrates that the extraordinary significance of the increase warrants preparing further modeling.

Moreover, the Companies' proposal to prepare supplemental analysis in response to extraordinary developments that arise during a resource planning proceeding is not unprecedented. In the 2022 Carbon Plan proceeding, the Companies conducted supplemental modeling on two separate occasions. First, the Companies prepared two supplemental portfolios several months after the filing of their initial proposed Carbon Plan based on recommendations made by the Public Staff and reflective of certain comments of other intervenors, including the AGO. Second, in advance of filing their rebuttal testimony, the Companies conducted a preliminary modeling sensitivity analysis based on an initial review of the federal Inflation Reduction Act of 2022 ("IRA")—which was signed into law on August 16, 2022, just under a month before the 2022 hearing—to test the robustness of the Companies' proposed near-term actions when accounting for the tax incentives included in the IRA. In neither case was the introduction of the supplemental modeling

Commission and all parties in a timely fashion"); Walmart Letter in Lieu of Comments at 1 ("Walmart does not oppose the Companies' proposal to conduct supplemental modeling and to file supplemental testimony"); CUCA Letter in Lieu of Comments at 2 (acknowledging that changes identified by the Companies are "sufficiently material, certain, and imminent that they materially impact the current planning process"); Environmental Defense Fund ("EDF") Comments at 9 (requesting the Commission to "require Duke to update its modeling to accommodate the update load forecasts"); Clean Energy Buyers Association ("CEBA") Comments at 8 (requesting the Commission to "[o]rder Duke to file and provide at least one supplemental resource portfolio and supplemental testimony that meet its Updated 2023 Fall Load Forecast"); Southern Alliance for Clean Energy, Sierra Club, Natural Resources Defense Council, and North Carolina Sustainable Energy Association ("SACE et al.") Comments at 1 (requesting the Commission to "order Duke to submit supplemental portfolios that comply with . . . the requirements of House Bill 951 under its updated load forecast").

opposed nor did the Commission deem that the introduction of the supplemental modeling required extensions of time. Instead, the Commission received and considered all such supplemental modeling along with the modeling performed by other parties. Like the supplemental modeling performed in 2022, the Companies' efforts to present supplemental modeling and additional portfolio analysis will aid the Commission and the parties in evaluating the CPIRP and resources proposed to be selected as part of the Near-Term Action Plan. As the AGO acknowledges, "there is value in ensuring that [the] CPIRP is accurate and reliable."⁹

To be clear, the Companies agree with the AGO that resource planning is an iterative process and that "at some point, we must 'snap the chalk line' in order to have a meaningful proceeding."¹⁰ The Companies likewise do not dispute that extraordinary circumstances must exist to warrant supplemental modeling within a biennial CPIRP proceeding.¹¹ However, there can be no doubt that such extraordinary circumstances exist here. Through the Supplemental Direct Testimony of witness Snider and in discovery responses, the Companies have presented evidence that the Updated 2023 Fall Load Forecast through 2030 has increased by approximately 2 GW as compared to the 2023 Spring Load Forecast used to develop the CPIRP.¹² Such material growth over a six month period is certainly extraordinary and, as the Public Staff notes, "the[se] significant changes to the load forecast . . . necessitate updated modeling."¹³

⁹AGO Letter in Lieu of Comments at 3 (stating that it "understands that there is value in ensuring that every CPIRP is sufficiently accurate and reliable.").

¹⁰ *Id.*

¹¹ *Id.*

¹² G. Snider Supp. Direct Testimony at 8.

¹³ Public Staff Comments at 4.

B. Supplemental Modeling and Additional Portfolio Analysis Will Not Supersede the Companies' Initial Filing

As explained in their December 18, 2023 letter to the Commission, the Companies' planned supplemental modeling will produce limited additional Portfolio Variants and Sensitivity Analysis Portfolios that will *supplement*—and *not replace*—the three Core Portfolios, 13 Portfolio Variants, and 10 Sensitivity Analysis Portfolios included in the CPIRP filed on August 18, 2023, all of which was based on the most accurate information at that time.¹⁴ The supplemental analysis is intended to inform the Commission's and the parties' consideration of the Companies' proposed Near-Term Action Plan, as well as the intermediate- and long-term least cost pathways to achieving the State's carbon emissions reduction targets.

Several intervenors suggest that the Commission should find that the Companies' initial modeling and portfolio analysis are *per se* unreasonable and irrelevant to the proceeding because they were not designed to meet the Updated 2023 Fall Load Forecast.¹⁵ The Companies disagree that their robust initial modeling and portfolio analysis is no longer reasonable or relevant to the Commission's consideration of the CPIRP. The 33 portfolios included in the Companies' as-filed CPIRP reflect modeling of potential future plans at varying levels of load, resource availability, resource costs, and other variants and sensitivities to key assumptions in the Plan. This initial portfolio analysis still has material value to the resource planning process by providing an assessment of the base line set of resources required to serve customers and is therefore informative to the Commission. The

¹⁴ CPIRP, Chapter 2 (Methodology and Key Assumptions) at 9-14 (describing Portfolio Variant and Sensitivity Analysis Portfolio modeling).

¹⁵ SACE et al. Comments at 5-6; CEBA Comments at 3; EDF Comments at 4-6.

Updated 2023 Fall Load Forecast and planned limited additional portfolios will simply provide a material new data point to inform the Commission’s evaluation of incremental resources that may be needed to serve customers in light of continued load growth. In other words, the initial modeling still constitutes competent, material, and substantial evidence regarding the foundational resources needed under any future scenario, while the supplemental portfolios will be used primarily to identify potential incremental resources that may be needed above what was identified in the initial modeling.

C. Preparing Supplemental Modeling and Additional Portfolio Analysis Rather than Wholly Refiling the CPIRP is Reasonable and Not Inconsistent with the Carbon Plan Framework or the Commission’s New CPIRP Rule

The Companies disagree with SACE et al. that preparing only supplemental modeling and limited additional portfolio analysis in response to the recent extraordinary load growth versus effectively re-running and refiling the entire CPIRP somehow conflicts with the new CPIRP Rule or the State’s statutory mandate to ensure the Carbon Plan’s “generation and resource changes maintain or improve on the adequacy and reliability of the existing grid.”¹⁶ Contrary to SACE et al.’s generalized assertions, the CPIRP Rule does not prescribe that the Companies must plan towards a single load forecast,¹⁷ and, indeed, the Companies’ initial CPIRP includes both high load and low load sensitivity analyses that can inform future planning and execution as real world events evolve.¹⁸ The Companies’ preparation of additional Portfolio Variant and Sensitivity Analysis Portfolios will further inform the Commission’s understanding of the CPIRP and assessment of the

¹⁶ SACE et al. Comments at 5-6.

¹⁷ See NCUC Rule R8-60A(f)(1) (identifying that CPIRP must present “Forecasts of Load” as part of the resource planning analysis).

¹⁸ CPIRP, Chapter 2 at 14 (Table 2-1: Carolinas Resource Plan Portfolio Matrix).

need for new resources to reliably serve customers' future energy and capacity needs. There is nothing inappropriate or inconsistent with the CPIRP Rule in providing additional information to the Commission and the updated and extended procedural schedule will allow SACE et al. to present its own alternative modeling and portfolio analysis to the extent it believes additional portfolios would be beneficial to the Commission.

Moreover, it is not feasible for the Companies to re-run their entire CPIRP in a month. Modeling a resource plan is an extremely time- and resource-intensive undertaking, and it would take many months for the Companies to completely overhaul their as-filed CPIRP. As stated above, the Companies' proactive approach to err on the side of transparency and perform updated modeling on an extremely expedited basis should not be used adversely against the Companies to impose unnecessary and impractical additional modeling. SACE et al.'s invocation of the CPIRP Rule is unsupported and its recommended approach is unnecessarily rigid, inconsistent with past practices, and at odds with the practical reality of resource planning processes in which the Commission will receive into evidence modeling conducted by a number of parties at different times and with a range of assumptions and inputs, all of which the Commission will weigh in rendering its decision.

D. Duke Does Not Support Requests of Certain Parties to Expand Scope of Supplemental Modeling, Including by Preparing Additional Portfolios under Pathway 1

Several intervenors suggest that the Companies should significantly expand their supplemental modeling efforts, including to model at least one portfolio that achieves the Interim Target by 2030. With respect to the Interim Target, the Companies' initial CPIRP satisfied the requirement to prepare a portfolio which demonstrates how the Companies

could achieve a 70% reduction in carbon emissions by 2030.¹⁹ The increases in load reflected in the Updated 2023 Fall Load Forecast will obviously make achievement of the Interim Target in 2030 even more challenging. The Companies will continue to assess whether there is a methodology to illustrate at a high level the incremental resources needed under a 2030 compliance scenario in light of the Updated 2023 Fall Load Forecast. But given the limited time and current demands on the Companies' technical personnel, the Companies are not performing modeling of a 2030 compliance scenario prior to January 31st.

Parties advocating for the Commission to order the Companies to expand the scope of supplemental modeling to include additional portfolio analysis beyond that presented in Attachment A to the Companies' December 18th letter ignore that their proposal would significantly increase the time and resources already dedicated to the proposed supplemental modeling and unnecessarily delay the aggressive timeline by which the Companies have committed to provide the supplemental modeling. Indeed, since notifying the Commission of their plans on December 18th, the Companies have devoted considerable time and resources to meet the aggressive January 31, 2024 target for filing their *limited* supplemental modeling and portfolio analysis. Any expansion to the scope of modeling would necessarily delay the Companies' ability to produce this new information to the parties.

¹⁹ NCUC Rule R8-60A(d)(4) (directing that "each CPIRP filed prior to 2030 shall include at least one resource portfolio that achieves the 70% reduction in carbon dioxide emissions by 2030.").

E. The Companies' Proposed Approach Promotes Reasonable Transparency and Allows Adequate Time for Intervenors to Review the Supplemental Modeling and Respond

As the Public Staff notes, the Companies' proposed procedural schedule "appropriately balance[s] the need of the parties to have adequate time to conduct their review and develop testimony with the need of the Commission to have sufficient time to conduct its decision-making."²⁰ Under the Companies' proposed schedule, parties will have ample time to prepare their direct testimony and respond to the January 31, 2024 supplemental filing, including (1) an additional 50 days beyond the current February 28th date prescribed by R8-60A to prepare their direct testimony; (2) 77 days from the January 31st filing to review and respond to the additional portfolio analysis, and (3) 131 days from the December 8th service of the Companies' supplemental discovery response producing the detailed Updated 2023 Fall Load Forecast data to review such data and incorporate it into any alternative modeling that is planned. For this reason, both the Public Staff and CIGFUR support the Companies' proposed procedural schedule as a reasonable compromise that will allow the parties time to review and respond to the Updated 2023 Fall Load Forecast.

While CUCA, Carolinas Clean Energy Business Association ("CCEBA"), Walmart, and TotalEnergies Renewables USA, LLC ("TotalEnergies") do not take a definitive position on any proposed procedural schedule, the remaining parties argue that the Commission should completely restart the 180-day period for intervenor review of the biennial CPIRP or, at minimum, grant intervenors in excess of 100 days *after* the Companies' January 31st filing to review the supplemental analysis, conduct discovery,

²⁰ Public Staff Comments at 5.

and prepare their direct testimony.²¹ Despite protesting that the Companies' proposal would "give intervenors too little time to assess Duke's proposed portfolios and generate viable alternatives"²² and will "prejudice any intervenor that is conducting independent third-party modeling[.]"²³ protesting intervenors provide scant detail on why 77 days to review and respond to the supplemental modeling and 131 days to review and incorporate the Updated 2023 Fall Load Forecast is insufficient. In contrast to these parties' generalized concerns and hyperbole about the implications of the proposed 50-day extension on their ability to develop independent modeling, upon information and belief, the Public Staff is planning its own independent modeling and has determined that the proposed 50 calendar day extension of the initial testimony filing date is workable to effectively participate in this proceeding. In contrast, SACE et al. and other intervenors present an unnecessary and unworkable extended schedule. These parties' request for a minimal 100+ day review period after January 30th is simply unnecessary given the limited scope of the new analysis and the fact that the Companies already provided the Updated 2023 Fall Load Forecast in discovery over a month ago on December 8th. The Companies are not proposing to re-do their CPIRP in its entirety, and accordingly intervenors are not entitled to the full 180-day review period set out in Rule R8-60A(g).

Finally, as a practical matter, the Companies also disagree with the assertion (implicit or express) that the introduction of the Updated 2023 Fall Load Forecast and

²¹ AGO, CEBA, and SACE et al. suggest that the Commission should effectively restart the clock on this proceeding and allow parties 180 days from the Companies' supplemental filing pursuant Commission Rule R8-60A(g). SACE et al. also propose an alternative 120-day extension of time for intervenors to file direct testimony by May 30, 2024, and a shortened 32-day period for Duke to file rebuttal testimony by July 1, 2024.

²² SACE et al. Comments at 2.

²³ *Id.* at 4.

supplemental modeling somehow negates or renders meaningless the review and alternative analysis conducted to date by parties in the proceeding based on the Companies' initial filing. Just like in the initial Carbon Plan proceeding, parties will have a wide range of perspectives on any number of modeling inputs and assumptions (e.g., assumed capital costs) that they will formulate based on their own independent analysis and informed by information provided in discovery. The Companies' supplemental modeling will simply provide new information through a limited number of Variant and Sensitivity Analysis Portfolios, which intervenors can assess and weigh in reaching their own conclusions and in no way negates any independent analysis conducted to date. Moreover, as a practical matter, two of the three parties now demanding the full 180-day review period waited months after the CPIRP was filed to issue their first discovery request to the Companies, including the AGO, which issued its first discovery request on October 26, 2023, and CEBA, which issued its first discovery request on November 28, 2023.²⁴

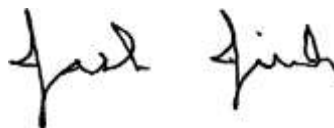
III. CONCLUSION

As set forth in detail above, the Companies have demonstrated that the significant, material increase to the Updated 2023 Fall Load Forecast amounts to an extraordinary circumstance warranting supplemental modeling analysis. The Companies believe both the scope of their supplemental modeling and their proposed procedural schedule appropriately balance the needs of the parties to review and respond to the supplemental information with the Commission's need for time to consider and prepare an order on the CPIRP, generally. Accordingly, the Companies respectfully request that the Commission:

²⁴ The EDF and NCSEA likewise did not immediately take advantage of the full discovery window, waiting until November 8, 2023 to issue their first requests.

1. Allow the Companies to submit, by January 31, 2024, their supplemental modeling and portfolio analysis, along with supporting testimony, based on the Updated 2023 Fall Load Forecast and as described in Attachment A to their December 18th letter;
2. Extend the deadline for the filing of Public Staff and Intervenor testimony to Wednesday, April 17, 2024;
3. Extend the deadline for the filing of the Companies' rebuttal testimony to Thursday, May 30, 2024; and
4. Reschedule the evidentiary hearing to begin on Monday, June 17, 2024.

Respectfully submitted, this the 9th day of January, 2024.



Jack E. Jirak
Jason A. Higginbotham
Kathleen H. Richard
Duke Energy Corporation
P.O. Box 1551/NCRH 20
Raleigh, North Carolina 27602
JEJ Telephone: (919) 546-3257
JAH Telephone: (704) 731-4015
KAR Telephone: (919) 546-6776
Jack.Jirak@duke-energy.com
Jason.Higginbotham@duke-energy.com
Kathleen.Richard@duke-energy.com

E. Brett Breitschwerdt
Tracy S. DeMarco
Nick A. Dantonio
McGuireWoods LLP
501 Fayetteville Street, Suite 500
PO Box 27507 (27611)
Raleigh, North Carolina 27601
EBB Telephone: (919) 755-6563
TSD Telephone: (919) 755-6682
NAD Telephone: (919) 755-6605
bbreitschwerdt@mcguirewoods.com

tdemarco@mcguirewoods.com
ndantonio@mcguirewoods.com

Brian L. Franklin
McGuireWoods LLP
201 North Tryon Street
Suite 3000
Charlotte, North Carolina 28202-2145
(704) 343-2078
bfranklin@mcguirewoods.com

*Attorneys for Duke Energy Carolinas, LLC
and Duke Energy Progress, LLC*

CERTIFICATE OF SERVICE

I certify that copies of Reply Comments of Duke Energy Carolinas, LLC and Duke Energy Progress, LLC, filed today in Docket No. E-100, Sub 190, have been served by electronic mail, hand delivery, or by depositing a copy in the United States mail, postage prepaid, properly addressed to parties of record.

This the 9th day of January, 2024.

/s/E. Brett Breitschwerdt

E. Brett Breitschwerdt

McGuireWoods LLP

501 Fayetteville Street, Suite 500

Raleigh, North Carolina 27601

Telephone: (919) 755-6563

bbreitschwerdt@mcguirewoods.com

*Attorney for Duke Energy Carolinas, LLC
and Duke Energy Progress, LLC*