

**BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI**

In the Matter of the Application of Union	)	
Electric Company d/b/a Ameren Missouri	)	
for Approval of New and Modified Tariffs	)	<u>File No. ET-2025-0184</u>
for Service to Large Load Customers	)	

STATEMENT OF POSITIONS OF RENEW MISSOURI

COMES NOW Renew Missouri Advocates d/b/a Renew Missouri, by and through the undersigned counsel, and for its *Statement of Positions*, states as follows:

A. Should the Commission adopt Ameren Missouri’s or Staff’s conceptual tariff, rate structure, and pricing in order to comply with Mo. Rev. Stat. Section 393.130.7?

Response: The Commission should adopt the tariff, rate structure, and pricing outlined in the *Corrected Non-Unanimous Global Stipulation and Agreement* (“Stipulation”), filed on November 9, 2025.

B. Should Large Load Customer Electric Service (“LLCS”) be a subclass of the LPS or a stand-alone class?

Response: LLCS should be a subclass of LPS for the moment. However, it is not unreasonable to create a stand-alone class for large load customers in a future rate case.¹

C. What should be the threshold demand load in megawatts (“MW”)/criteria for LLCS customers to receive service under a Commission approved LLPS tariff?

a. To the extent the threshold captures existing customers, should a grandfathering provision for such customer be adopted?

Response: As outlined in the Stipulation, the threshold demand should be 75 MW or more of new or existing monthly forecasted demand.² To the extent this threshold captures existing

¹ *Surrebuttal Testimony of Steven M. Wills*, p. 115, l. 15-p. 116, l. 2.

² Stipulation, para. 4.

customers, they should be allowed to continue, if they choose, to remain on Schedule 11(M).³ However, if these existing customers add load of 75 MW or greater, that additional new load should be served under Schedule LLCS.⁴

D. What other existing programs and riders should or should not be available to LLCS customers, if any?

Response: The Cost Stabilization Rider (CSR) should be applied to all Schedule LLCS customers eligible to receive service under Ameren's Economic Development Rider.⁵ The CSR shall not be subject to any economic development rider discount.⁶ Other class appropriate riders and charges set forth in Ameren rates and regulations, including but not limited to Rider FAC, Rider EEIC,⁷ Rider SUR, and Rider RESRAM.

E. Should the LLPS customer bear responsibility for its interconnection and related non-FERC transmission infrastructure costs?

a. How should such interconnection and related non-FERC transmission infrastructure costs be accounted for or tracked, if at all?

Response: For a Schedule LLCS customer receives service at a voltage of 115 kV or greater, the customer should own or otherwise bear financial responsibility for construction and operation of the distribution substation.⁸ For other customers, for extensions of transmission or substation facilities, any customer requesting service with substation or transmission facilities should pay all costs associated with such extensions.⁹ Customers requesting service through substation or transmission facilities must complete payment for the extension or make suitable arrangements for installment payments, execute all required agreements associated with the requested extensions,

³ Stipulation, para. 40.

⁴ *Id.*

⁵ *Id.* para. 16.

⁶ *Id.* para. 17.

⁷ To the extent a customer has not opted out under Section 393.1075.7, 8, and 9, RSMo.

⁸ Stipulation, para. 5.

⁹ *Id.* para. 42.

and execute any applicable service agreements as required by the applicable rate schedule as a condition for any construction to commence, as outlined in the Stipulation.¹⁰

F. What minimum term of service should be required for an LLCS customer to receive service under the Commission approved LLCS tariffs?

a. What is the minimum and maximum ramp schedule?

b. What is the minimum term after the maximum ramp period ends?

Response: In accordance with the Stipulation, Schedule LLCS customers shall take service for a minimum term that includes up to five years of an optional transitional load ramp period plus twelve years.¹¹

c. Is Elective Termination permitted? If so, then what is the appropriate Termination Fee?

Response: Yes, elective termination, subject to the terms and conditions outlined in the Stipulation, should be permitted.¹² For fees, if a customer terminates its service during the ramp period, the customer should pay to Ameren Missouri an Exit Fee in an amount equal to the applicable Minimum Monthly Bill multiplied by the number of months in the remaining term of the load ramp period plus sixty calendar months.¹³ If the customer terminates after the ramp period, the Customer shall pay to Ameren Missouri an Exit Fee in an amount equal to the applicable Minimum Monthly Bill multiplied by the lesser of a period of sixty calendar months commencing on the Termination Date or the number of months in the remaining Term or Extension Term as of the Termination Date.¹⁴ For customers terminating with less than 24 months' notice, the Early Termination Fee should be equal to two times the nominal value of the applicable Minimum

¹⁰ *Id.*

¹¹ *Id.* para. 8.

¹² *Id.* para. 11.

¹³ *Id.*

¹⁴ *Id.*

Monthly Bill times the number of months less than the 24 months' notice required for termination, as outlined in the Stipulation.¹⁵

G. What minimum demand terms and conditions should apply to LLCS customers?

- a. What Maximum LLC Capacity reduction should be allowed?**
- b. Under what terms should a capacity reduction be allowed? How much should the capacity be in terms of percentage of the original Maximum LLC Capacity?**
- c. Under what terms should a subsequent contract reduction occur?**
- d. How should the Capacity Reduction Fee be determined?**

Response: As outlined in the Stipulation, customer taking service under Schedule LLCS may request to reduce the Contract Capacity during the Term or any Extension Term by up to twenty percent of the Contract Capacity ("Permissible Capacity Reduction") in total, without charge for such reduction.¹⁶ The customer must provide Ameren at least 24 months' prior written notice.¹⁷ In addition, the customer may request to reduce its Contract Capacity beyond the Permissible Capacity Reduction, with the effective date of any such reduction occurring at any time after the first five years of the term by giving the Company at least twenty-four months' written notice prior to the beginning of the year for which the reduction is sought, subject to payment of a Capacity Reduction Fee.¹⁸ As outlined in the Stipulation, the Capacity Reduction Fee shall be calculated as two times the difference between (a) the nominal value of the Minimum Monthly Bill using the Contract Capacity specified in the customer's LLCS Service Agreement minus (if applicable) the Permissible Capacity Reduction, times the number of months remaining in the Term or Extension Term, or for sixty months, whichever is lesser, and (b) the nominal value of the Minimum Monthly Bill following such a reduction in capacity, times the number of months remaining in the Term or

¹⁵ *Id.*

¹⁶ *Id.* para. 10.

¹⁷ *Id.*

¹⁸ *Id.*

Extension Term, or for sixty months, whichever is lesser.¹⁹ Furthermore, customers should be subjected to a Demand Charge, wherein a minimum monthly demand of 80% of the Contract Capacity should be ordered, Customer Charge, Low-Income Pilot Program Charge, Other Demand-Based Riders, and the Cost Stabilization Rider, as detailed in the Stipulation.²⁰

H. What collateral or other security requirements should be required for a LLCS customer to receive service under the Commission approved LLCS tariffs?

Response: The collateral and security requirements negotiated by the Signatories are quite lengthy, so for brevity of the record, the Commission should order the requirements set out in paragraphs 18 through 32.

I. What should the notice requirements be, if any, for extension of service beyond the initial minimum term?

Response: If no notice is given by either the customer or Ameren 36 months prior to the end of the initial, the term should extend automatically for an additional 5 years.²¹

J. Should LLCS customers be included in the Fuel Adjustment Clause (“FAC”)?

- a. What impact will the inclusion of LLCS customers in the FAC have on non-LLCS customers and, if there is an impact, what if anything should the Commission order to address it?**
- b. What, if any, changes should be made to Ameren Missouri’s existing FAC tariff sheet?**
- c. When/in what case should any changes be made?**

Response: LLCS customers should be included in the FAC, as provided for in the Stipulation, so that the tracked revenues from the additional new riders can be flowed through to the benefit of all customers.²² Only the changes in accordance with the *Direct Testimony of Steve Wills* to incorporate the LLCS customers into the FAC and to track and return revenues from the additional new riders should be ordered.²³

¹⁹ *Id.*

²⁰ *Id.* para. 15.

²¹ *Id.* para. 8.

²² *Id.* para. 41.

²³ *Id.*

K. Should LLCS customers be served from a separate, unique, designated load node?

Response: No. Customers should be served and charged rates in accordance with the terms and conditions outlined in the Stipulation.

L. Is a waiver of RES requirements 20 CSR 4240.20.100(1)(W) and the authorizing statute lawful and reasonable with regard to LLCS customers?

Response: The request for a variance is to exclude the portion of LLCS customer load from the Renewable Energy Standard ("RES") requirement. This means the customer has acquired and retired renewable energy credits ("REC") for its load, which means that requiring Ameren Missouri to retire the same number of RECs for the same load is not necessary to meet the intent of the RES statute.²⁴ Essentially, whether calculated as part of the total MWh, or as a separate customer LLCS total that is added to remaining customers' total retail sales, the resulting figure should be substantially close enough to comply with the intent of the statute. However, this variance enables Ameren Missouri to avoid passing on the cost of retiring RECs, including procuring RECs through purchase or construction of additional qualifying generation sources, for that LLCS customer unnecessarily or inadvertently, by separating that load.

M. How should revenues from LLCS customers be treated?

Response: Revenues from the LLCS customers should be treated as outlined in the Stipulation, including tracking where appropriate revenues from any newly authorized riders to flow back into the FAC.

N. What additional riders, if any, should be authorized by the Commission at this time, including:

- a. The Clean Capacity Advancement Program?**
- b. The Clean Energy Choice Program?**
- c. The Nuclear Energy Credit Program?**
- d. The Renewable Solutions Program – Large Load Customers?**

²⁴ 393.1030, RSMo. (Revised 2025).

Response: At this time, the additional riders, including the Clean Capacity Advancement Program, Clean Energy Choice Program, Nuclear Energy Credit Program, and Renewable Solutions Program-Large Load Customers, should be authorized by the Commission, as outlined in the Stipulation.

Renewable Solutions Program-Large Load Customers: This is an optional rate for LLCs who subscribe to renewable energy from Ameren Missouri-owned or contracted projects.²⁵ This program will operate similarly to Ameren Missouri's current RSP subscription program.²⁶ RSP-LLC will help customers reach "sustainability goals; reduce[s] your carbon footprint; lower[s] local emissions; support[s] the renewable energy market;" contributes towards being "good stewards of the Missouri environment; [and] shows you use clean energy to your shareholders, customers, community and employees."²⁷ It will also help Ameren Missouri reach their stated sustainability goals.²⁸ Furthermore, generation resources utilized for this rider program are "part of the Company's preferred resource plan."²⁹ The Company's 2024 IRP update states RSP "offer[s] Ameren Missouri commercial and industrial customers and communities a pathway to meet their sustainability goals with local renewable energy while reducing cost and risk for all Ameren Missouri customers."³⁰

Clean Capacity Advancement Program: This rider supports clean capacity additions, such as battery storage.³¹ The customer will pay a specific price per MW each month to contribute to the

²⁵ *Rebuttal Testimony of Jessica Polk Sentell*, p. 5, l. 1-p. 6, l. 3.

²⁶ *Id.*

²⁷ *Id.*, quoting <https://www.ameren.com/-/media/missouri-site/files/cleanenergycustomerprograms/renewable-solutions/renewable-solutions-phase-2.ashx>, p. 6.

²⁸ *Id.*

²⁹ *Direct Testimony of Ajay Arora*, p. 16.

³⁰ *Rebuttal Testimony of Jessica Polk Sentell*, p. 5, l. 1-p.6, l.3, quoting https://www.ameren.com/-/media/missouri-site/files/environment/irp/2024/2024_ameren_irp_annual_update.ashx, p. 19.

³¹ *Id.* at p. 6, l. 4- 17.

costs of adding the clean capacity and general revenue requirements.³² In Ameren Missouri’s own words, battery storage “is more economic than additional [natural gas] up to at least 1,750 MW, and likely closer to 2,000 MW.”³³ Besides adding clean capacity, increased clean energy choices will reduce greenhouse gas emissions and thus improve conditions for better health of Missourians.³⁴

Clean Energy Choice Program: The CEC allows LLCs to bring proposals to Ameren Missouri, asking them to study and potentially implement clean energy technology resources not accounted for in current or future Integrated Resources Plans (“IRPs”).³⁵ The implementation is still subject to PSC approval.³⁶

e. The Clean Transition Tariff (as described in the Rebuttal Testimony of Dr. Carolyn Berry)?

Response: At this time, Renew Missouri is advocating the Commission approve the riders contained in the Stipulation. However, for future rate cases, Renew Missouri would encourage Ameren Missouri, and other stakeholders to evaluate and consider the value of a Clean Transition Tariff, as described by Dr. Carolyn Berry, or additional programs, such as demand response or bring your own capacity programs, as briefly described in Renew’s rebuttal testimony.³⁷

O. Should a form customer service agreement be included in the Commission approved LLCs tariffs resulting from this case?

- a. Should a form ESA be included in the pro forma LPS Tariff?**
- b. Should the ESA require approval by the Commission?**
- c. Should minimum filing requirements be required?**
- d. What is the standard for review?**

³² *Id.*

³³ *Direct Testimony of Matt Michels*, p. 14.

³⁴ *Rebuttal Testimony of Jessica Polk Sentell*, p. 6, l. 4-17.

³⁵ *Id.* at p. 7, l. 1-12.

³⁶ *Id.*

³⁷ *Id.* p. 13, l. 14-p. 17, l. 13.

Response: Service Agreements should comport with the Stipulation. No form ESA or customer service agreement should be ordered in this case, nor minimum filing requirements. ESAs in line with the tariff, should not, at this time, require Commission approval.³⁸ However, the Commission would retain rights to review violations of tariffs as well as issues of prudence, as it always does, to be evaluated in accordance with established prudence standards and complaint proceedings.

P. Are changes needed for the Emergency Energy Conservation Plan tariff sheet and related tariff sheets to accommodate LLCS customers?

Response: Currently, Ameren has an Emergency Energy Conservation Plan, which would govern emergency curtailment situations, and would accommodate LLCS customers without modification.

Q. What studies should be required for customers to take service under the LLCS tariff, if any?

Response: The Commission should order the Pathway to Power as an appropriate framework at this time to evaluate an interconnection request from a LLCS customer, including any studies under that framework considered necessary.³⁹

R. What reporting on large load customers should the Commission require?

Response: The Commission should order the reporting on large load customers contained in paragraph 33, as a minimum, and allow for stakeholders to meet to determine any additional metrics, as outlined in the same paragraph.

S. Should the Commission order a community benefits program as described in the testimony of Dr. Geoff Marke?

³⁸ Stipulation, para. 7.

³⁹ *Id.* at para. 42.

Response: At this time, the Commission should order only the terms, conditions, and programs described in the Stipulation, but allow -which the Stipulation does- for future programs and riders to be evaluated for inclusion in future rate cases.

Respectfully,

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Certificate of Service

I hereby certify that copies of the foregoing have been emailed to all counsel of record
this 10th day of November 2025.

/s/Nicole Mers