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COMMISSIONERS:
JASON SHAW, Chairman
LAUREN "BUBBA" McDONALD, Vice-Chairman
PETER HUBBARD
DR. ALICIA M. JOHNSON
TRICIA PRIDEMORE

REECE McALISTER
EXECUTIVE DIRECTOR

SALLIE TANNER
EXECUTIVE SECRETARY

Georgia Public Service Commission

(404) 656-4501
(800) 282-5813

244 WASHINGTON STREET, SW
ATLANTA, GEORGIA 30334-5701

FAX: (404) 656-2341
psc.ga.gov

***In Re*:**

Atlanta Gas Light Company's Integrated Capacity and Delivery Plan

DOCKET NO. 43820

ORDER APPROVING AMENDMENTS TO ATLANTA GAS LIGHT COMPANY'S 2025 – 2034 INTEGRATED CAPACITY AND DELIVERY PLAN

I. Background

On February 23, 2021, the Commission approved the Order Adopting a Stipulation in Docket No. 42315. The Stipulation adopted that was submitted by Staff and AGL (the "Governance Document") that allowed the Company to file, for the Commission's consideration, a comprehensive planning tool, referred to as the Integrated Capacity and Delivery Plan ("i-CDP" or the "Plan"). The Plan's purpose is to help ensure consistency and continuity of the forecasts, assumptions, selected options, and other planning parameters that the Company files within the independent Capacity Supply Plan ("CSP") and Georgia Rate Adjustment Mechanism ("GRAM") processes. The Commission approved the Company's first i-CDP, the 2022-2031 i-CDP, on November 18, 2021.

On February 1, 2024, AGL filed its 2025-2034 i-CDP in this docket, along with pre-filed supporting direct testimony, a Petition for Approval of the Plan, and the other minimum filing requirements established in the Stipulation Governance Document. AGL included within its February 1, 2024 filing, a request for an amendment to year 2024 of the 2022-2031 i-CDP to allow for more operational flexibility by shifting dollars between the GRAM – Safety and Compliance and the GRAM – Other budget categories and to continue this operational flexibility of shifting dollars between GRAM budget categories in this 2025-2034 i-CDP and future i-CDPs. On February 8, 2024, the Commission issued its Procedural and Scheduling Order in this Docket,

which set forth the dates for filing of testimony and briefs, as well as the dates for the hearings in this matter. This proceeding was deemed complex litigation pursuant to O.C.G.A. § 9-11-33(a).

On May 9, 2024, AGL filed an amendment to the 2025-2034 i-CDP to amend the narrative document of the 2025-2034 i-CDP to correct tables under "Figure 5.10: Bill Impacts" and to update the filing date and file name as "amended."

On May 14, 2024, Staff filed direct testimony in response to the Company's direct case in this docket, along with the Direct Testimony, Exhibits, and the 2024 Affiliate Audit Report by Kennedy and Associates. On May 29, 2024, the Commission issued an order revising the filing date for rebuttal testimony. On June 3, 2024, the Commission again issued an order extending the filing date for rebuttal testimony. AGL and Staff negotiated a workable compromise that would meet the Commission Staff's and the Company's goals while protecting the public interest. On June 10, 2024, AGL, Staff, and the Intervening Marketers filed a Stipulation. AGL also filed amended Minimum Filing Requirements on June 11, 2024. The Commission held a hearing in this docket on the stipulation on June 12, 2024. AGL, Staff, and the Named Marketers stipulated to enter into the record the pre-filed direct testimony in support of the Company's direct case and the pre-filed direct testimony of Staff and waived cross examination of the pre-filed direct testimony.

This matter came before the Commission at the regularly scheduled Energy Committee on June 27, 2024. On July 2, 2024, at its regularly scheduled Administrative Session, the Commission voted to approve AGL's 2025-2034 i-CDP as amended on May 9, 2024, and as modified by the Stipulation.

II. Governance Document Section-5

As provided in the Governance Document in Section-5, if there are certain factors and circumstances that may require AGL to deviate from an approved i-CDP, an amendment to the Plan for consideration must be filed. Such factors and circumstances could include, but not be limited to, changes to FERC-regulated interstate suppliers' planned additions that affect a planned AGL intrastate project, new compliance regulations, newly discovered risks, revised assessments of previously known risks, shifts in customer growth and retention patterns, accelerated local, state and federal infrastructure projects, and other factors that require that AGL reprioritize projects within an existing i-CDP.

III. Atlanta Gas Light Company's Petition to Amend the 2025 – 2034 i-CDP

On May 14, 2026, AGL filed a petition to amend the 2025 – 2034 i-CDP. The Company requested two amendments to the Plan as a result of additional interstate pipeline capacity becoming available to AGL's system and capital budget over- and underspending.

Prior to the Company's filing, Staff had meetings with AGL to discuss its amendment requests. Section-5 of the Governance Document allows for an i-CDP to be amended but does not provide for the process. Staff and AGL collaborated to agree to a process for an amendment filing. As part of this process, Staff researched and analyzed a number of items for inclusion in the filing. Staff reviewed the capital budgets and projects approved by the Commission in the 2025-2034 i-

CDP. Staff also reviewed the GRAM, SRR and Cherokee LNG quarterly reports to determine actual budget progress. Staff reviewed AGL's preliminary documents, which included a draft petition and a PowerPoint presentation. Staff reviewed the SNG and Transco websites to gather information on the interstate pipeline projects, Southern Natural Gas South System Expansion 4 Project ("SSE") and the Transco South East Supply Enhancement Project ("SEP"). These were mentioned in the i-CDP as potential capacity projects on the interstate pipeline (Chapter 4, page 32 of AGL's 2025-2034 i-CDP). Transco held an open season for shippers interested in the SEP project in July 2023. At the time of the 2025-3034 i-CDP filing, there was no affirmative information that each project was guaranteed to move forward at the time of the filing in 2024.

Prior to the filing of the 2025 – 2028 Capacity Supply Plan, information was provided that the two projects were approved for construction, and AGL's participation in the projects was approved in the 2025 – 2028 CSP. AGL subscribed to 200,000 Dth/d of firm transportation capacity in the SSE project and 75,000 Dth/d of firm transportation capacity in the SEP project. AGL acquired interstate capacity for SEP, which is expected to be in-service in late 2027, in time for the 2027-2028 heating season. AGL also acquired capacity for SSE, which is expected to be in service in late 2028.

On April 6, 2026, AGL provided a draft Amendment for Staff's review. Staff added more details about each of the amendment items to the draft Amendment. AGL also provided amended MFRs for Staff's review. As part of the collaborative process, Staff and AGL agreed to the language in the amendment filing.

The first amendment is the result of the SSE and SEP projects, which will allow additional interstate pipeline capacity to become available to AGL's system. This amendment would add four (4) tap stations and one (1) Riverdale LNG tap meter to the System Reinforcement Rider ("SRR") for recovery. The filing included amendments to MFR-1 and MFR-3 to supplement the Company's requested amendment to the SRR.

The second amendment is related to the Cherokee LNG expansion, where construction activity has exceeded the approved 2025 – 2027 capital budgets. The 2025 – 2027 GRAM and the SRR actual capital budget activity are underspending. This amendment would allow the 2025 – 2027 total GRAM capital budget amount, the total 2025 – 2027 SRR capital budget amount, and the 2025 – 2027 Cherokee LNG Tracker total capital budget amount to be combined to allow Cherokee LNG Tracker overspending to be absorbed by the underspending in the GRAM and SRR capital budgets. The aggregate three-year capital budget of the projects in the amended Plan would not exceed the total Commission-approved three-year capital budget of the projects, $1.869 billion. (Figure 1).

Figure-1: Approved 2025 – 2027 i-CDP Capital Budgets

GRAM - SRR - Cherokee LNG	
Year	Approved Capital Budgets
2025	$602,900,000
2026	$623,700,000
2027	$643,300,000
Total Approved	**$1,869,900,000**

A. First Amendment to Add Four (4) Tap Stations and One (1) Riverdale LNG Tap Meter to the 2025-2034 i-CDP SRR Projects

As part of the first amendment request, AGL seeks an amendment to upgrade four (4) tap stations and one (1) Riverdale LNG tap meter to the SRR for recovery. These projects are related to Southern Natural Gas Company, L.L.C. ("SNG") and the Transcontinental Gas Pipe Line Corporation ("Transco") upgrading their systems to bring additional natural gas capacity to Georgia.

The Southern Natural Gas South System Expansion 4 Project ("SSE") is a project that will run parallel to SNG's South Main Line, along existing pipelines in Mississippi, Alabama, and Georgia. This project will provide 200,000 Dth/day of new capacity to AGL's system. Transco South East Supply Enhancement Project ("SEP") is an expansion of the existing Transco pipeline's capacity in the southeastern United States and will provide reliable natural gas deliveries to Virginia, the Carolinas, Georgia and Alabama. This project will provide 75,000 Dth/day of new capacity to AGL's system.

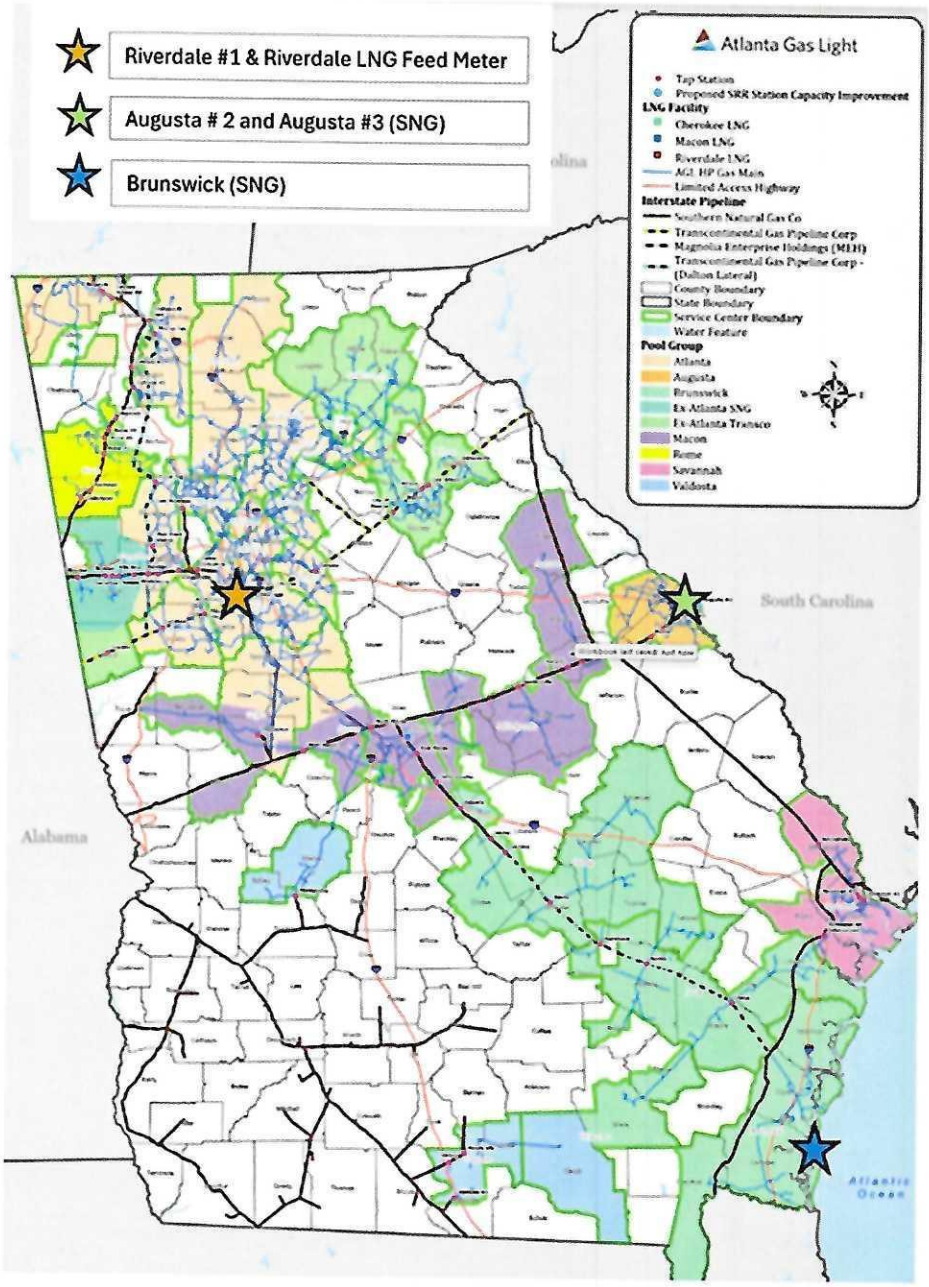
To receive and deliver the additional capacity on its system, AGL must increase the capacity of its facilities. The following stations are being upgraded as a result of the interstate pipeline projects:

a) Riverdale #1:
b) Augusta #2:
c) Augusta #3:
d) Riverdale LNG Tap Meter
e) Brunswick/Bordertown

The Riverdale #1, Augusta #2, and Augusta #3 tap stations will require increased station capacity to accommodate the additional capacity from SNG and Transco. The Riverdale #1 station capacity must be increased from 16,000 MCFH to 30,000 MCFH. The Augusta #2 station capacity must be increased from 647 MCFH to 1,300 MCFH. The Augusta #3 station capacity must be increased from 1,400 MCFH to 2,500 MCFH. The upgrade to the Riverdale LNG tap meter includes the replacement of the SNG metering facilities and the addition of the new Transco interconnect and metering. According to the petition for an amendment, this will allow for better utilization of the additional capacity from SNG and Transco. In addition, Brunswick/Bordertown

tap station upgrades are needed to replace obsolete equipment, address MAOP reconfirmation issues, and increase capacity to support increasing customer usage in the area.

Figure-2: Map of the Station Locations



AGL provided MFRs to supplement its requested amendment. The filed MFRs provided project details such as project locations, completion dates, and system reinforcement or pressure improvement issues being addressed. Figure 2 shows a map included in the MFRs.

The total project cost for upgrading all the stations is forecasted at $33.4 million.

B. Second Amendment for a 2025 – 2027 GRAM, Cherokee LNG, and SRR Capital Budget Combined Review Request

In the second amendment, AGL is requesting a combined review of the 2025 – 2027 GRAM, SRR, and Cherokee LNG Tracker capital budgets. The Company has recently forecasted that by the end of 2027, the GRAM capital budget will be underspent by $11.9 million. By the end of 2027, the Company has forecasted that SRR will be underspent by $62.8 million. The SRR underspending is a result of some projects being completed at costs lower than originally estimated. Project delays primarily due to challenges related to land access have also contributed to SRR underspending.

If the first amendment is approved, the $33.4 million in station upgrades will reduce the SRR underspend of $62.8 million to $29.4 million. In addition, by the end of 2027, the Cherokee LNG Tracker capital budget is forecasted to overspend by $41.2 million. The remaining underspend of $29.4 million and the GRAM underspend of $11.9 million will cover the $41.2 million Cherokee LNG overspend. The Company stated in its petition that budget overspend is a result of the supply chain disruptions and inflationary labor and material increases associated with the pandemic.

By netting the capital budgets of GRAM, SRR, and Cherokee LNG Tracker, the overspending related to the Cherokee LNG Tracker capital budget will be absorbed by the underspending related to the GRAM and SRR capital budget. As a result, the aggregate capital budgets approved by the Stipulation are unaffected. Likewise, rate adjustments approved by the Stipulation are unaffected.

IV. Staff Analysis

Staff provided substantial research and analysis as part of the collaboration with AGL, as discussed in Section-III above. As part of Staff's due diligence on the official filing, Staff ensured that the filed documents matched the documents agreed to as part of the Staff and AGL collaboration. After review, Staff found no issues with the filed documents.

Staff reviewed the MFRs and found them consistent with the MFR content provided in prior i-CDP filings. In reviewing the filed documents, Staff determined that a combined review of the three capital budgets was the best approach, as opposed to reallocating the underspend related to GRAM and SRR to the Cherokee LNG Tracker capital budget. Staff concluded that this approach would be more effective in ensuring that the overall approved budgets would not be exceeded. Staff determined that two amendments were required for the inclusion of new SRR projects and the combined capital budget review.

V. Commission Decision

During the June 16, 2026, Administrative Session, the Commission approved Atlanta Gas Light Company's Petition to Amend the 2025 – 2034 i-CDP

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VI. Ordering Paragraphs

WHEREFORE IT IS ORDERED, that all findings, conclusions, and statements made by the Commission and contained in the foregoing sections of this Order are hereby adopted as findings of fact, conclusions of law, and statements of regulatory policy of this Commission.

ORDERED FURTHER, that the Commission hereby approves AGL's amendment to the 2025-2034 i-CDP to add four (4) tap stations and one (1) Riverdale LNG Tap Meter as new SRR projects.

ORDERED FURTHER, that the Commission hereby approves AGL's amendment to the 2025-2034 i-CDP for a combined review of the total 2025 – 2027 GRAM, Cherokee LNG, and SRR capital budgets.

ORDERED FURTHER, that a motion for reconsideration, rehearing, or oral argument or any other motion shall not stay the effective date of this Order, unless otherwise ordered by the Commission.

ORDERED FURTHER, that jurisdiction over this matter is expressly retained for the purpose of entering such further Order or Orders the Commission may deem just and proper.

The above by action of the Commission during its Administrative Session on the 16th day of June 2026

Sallie Tanner
Executive Secretary

6-22-26
Date

Jason Shaw
Chairman

6-22-26
Date