



NERC MOD 031

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System & Resource Planning

Load Forecasting Task Force

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Summary of MOD-031

- **Overview of NERC MOD-031**
- **Timeline of development**
- **How it affects NYISO & Transmission Owners**
- **Contents of the Standard**
- **Documentation of compliance**

Overview MOD-031

- **Mandatory data request related to data used for modeling & analysis.**
- **Supersedes MODs 016, 017, 018, 019, 020 & 021 which were applicable only to the NYISO.**
- **Now applies to NYISO and Transmission Owners effective July 1, 2016**
- **Provides the NYISO with authority to request actual and forecast load data from each Transmission Owner.**
 - *NYISO must provide to NPCC*
 - *NYISO can share the data with other Transmission Owners*
 - *Transmission Owner may request confidentiality of data, with good cause*
- **Much of the data is already provided by Transmission Owners already, as part of the annual ICAP forecast, with the exception of long term energy and peak forecasts.**

Purpose & Justification

- **Purpose:** To provide authority for applicable entities to collect Demand, energy and related data to support reliability studies and assessments and to enumerate the responsibilities and obligations of requestors and respondents of that data.
- **Rationale:** To ensure that planners and operators have access to complete and accurate load forecasts – as well as the supporting methods and assumptions used to develop these forecasts – enhances the reliability of the Bulk Electric System.
- **Confidentiality Clause:** Data requested by entities other than the Planning Coordinator shall be provided unless releasing it would conflict with confidentiality, regulatory or security requirements.

Timeline of Adoption

- **MOD-031-1: Original statement of requirements**
 - *Adopted by NERC May 6, 2014*
 - *Approved by FERC on February 19, 2015*
 - *Effective July 1, 2016*
- **MOD-031-2: Added confidentiality clause applicable to data requests from one Transmission Planner to another. Does not apply to the data request from the Balancing Authority or Planning Coordinator.**
 - *Submitted by NERC to FERC for approval on November 13, 2015*
 - *Approved by FERC on February 18, 2016*
 - *Effective October 1, 2016*

NERC Roles & Definitions Under MOD 031

NERC Roles	NYCA Organizations	NERC Definitions
Planning Authority, Planning Coordinator	NYISO	The responsible entity that coordinates and integrates transmission Facilities and service plans, resource plans, and Protection Systems.
Balancing Authority	NYISO	The responsible entity that integrates resource plans ahead of time, maintains Demand and resource balance within a Balancing Authority Area, and supports
Resource Planner	NYISO	The entity that develops a long-term (generally one year and beyond) plan for the resource adequacy of specific loads (customer demand and energy requirements) within a Planning Authority area.
Transmission Planners	Transmission Owners, NYISO	The entity that develops a long-term (generally one year and beyond) plan for the reliability (adequacy) of the interconnected bulk electric transmission systems within its portion of the Planning Authority area.
Distribution Provider	Transmission Owners	Provides and operates the “wires” between the transmission system and the end-use customer. For those end-use customers who are served at transmission voltages, the Transmission Owner also serves as the Distribution Provider. Thus, the Distribution Provider is not defined by a specific voltage, but rather as performing the distribution function at any voltage.
Load Serving Entities	Transmission Owners & Load Serving Entities	Secures energy and Transmission Service (and related Interconnected Operations Services) to serve the electrical demand and energy requirements of its end-use customers.

Requirements 1.1 & 1.2: Data Request

1.1 List of organizations required to provide data

- *NYISO provides data upon request to NPCC;*
- *Transmission Owners provide data upon request to NYISO.*

1.2 Timetable for providing the data

- *TOs have 45 calendar days to provide data to the NYISO;*
- *The NYISO has 75 days to provide data to NPCC.*

Requirement 1.3 – Actual Data

- **Integrated hourly demands in megawatts for the prior calendar year**
- **Weather normalized annual peak hour actual demand for the prior calendar year**
- **Controllable Demand Side Management**
- **Other data, which can be derived from the above**
- **All requirements are currently being met by Transmission Owners**

Requirement 1.4 – Forecast Data

- **Monthly forecasts two years ahead**
 - *Peak forecast*
 - *Energy forecast*
- **Annual energy & Seasonal peak forecast ten years ahead**
 - *Summer & winter seasonal peaks*
 - *Annual energy*
- **Certain TOs provide some of this data now**
- **Transmission Owners will be requested to provide this going forward**

Requirement 1.5 – Documentation of Forecasts

- **Assumptions and methods used to develop the forecasts**
- **Impacts of controllable Demand Side Management (DSM)**
- **Use of DSM in the forecasts of peak demand and annual energy**
- **Comparison of forecast to actual controllable DSM**
- **Peak demand forecast comparison with actual demand for the prior calendar year with due regard to:**
 - *any relevant weather related variations*
 - *if applicable, how the assumptions and methods for future forecasts were adjusted*

Requirements for Documentation of Notice & Compliance

- **The Balancing Authority (NYISO) shall have a dated data request, either in hardcopy or electronic format.**
- **Each Applicable Entity (TOs) shall have evidence, such as dated e-mails or dated transmittal letters, that it provided the requested data.**
- **The Balancing Authority (NYISO) shall provide the data for their area to the applicable Regional Entity (NPCC) within 75 calendar days of receiving a request for such data, unless otherwise agreed upon by the parties.**

References

1. NERC MOD 031-2

http://www.nerc.com/pa/Stand/Project%202010041%20MOD031%20Order%20No%20804%20Directives%20DL/MOD-031-2_Standard_Clean_20150707.pdf

2. FERC letter authorizing MOD 031-2

<http://www.nerc.com/FilingsOrders/us/FERCOrdersRules/Letter%20Order%20Approving%20MOD-031-2.pdf>

3. NERC Glossary of Terms

http://www.nerc.com/files/glossary_of_terms.pdf

The Mission of the New York Independent System Operator, in collaboration with its stakeholders, is to serve the public interest and provide benefit to consumers by:

- *Maintaining and enhancing regional reliability*
- *Operating open, fair and competitive wholesale electricity markets*
- *Planning the power system for the future*
- *Providing factual information to policy makers, stakeholders and investors in the power system*

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