

I. Supplemental Results

A. AC Public Policy Transmission LCR Impact

In the published report, the derived IRM/LCRs in the report were modified for model years 2026 and 2032 to reflect changes due to planned transmission topology changes from the AC Public Policy Transmission line, with expected in-service date of December 2023, based on the assumptions used by NYISO in its Buyer Side Mitigation forecasts. These represent a decrease of the LCR by 6.0% in G-J from capability years 2023/24 to 2024/25.¹

In response to stakeholder feedback, this supplement provides results for additional sensitivities where the LCR in the G-J Locality reflects a larger reduction of -8.0% or -10.0%. The sensitivities are summarized in Table 1 below:

Table 1: AC Transmission LCR Adjustment Scenarios

Sensitivity	Impact on G-J Locality LCR for 2026 and 2032
Baseline Sensitivity: Impact from 2019 BSM Analysis Parameters	-6.0%
Alternate AC Transmission Assumptions (-8% G-J LCR)	-8.0%
Alternate AC Transmission Assumptions (-10% G-J LCR)	-10.0%

B. Results for -8% G-J LCR Sensitivity

The capacity prices for 2026 and 2032 under the -8% G-J LCR sensitivity are described in Table 2:

Table 2: Capacity Market Clearing Prices (\$/kW-mo) by Capacity Locality and Season, -8% G-J LCR Sensitivity, 2026-2032

Capacity Locality	2026		2032	
	Summer	Winter	Summer	Winter
NYCA	\$5.26	\$4.45	\$6.23	\$6.06
G-J Locality	\$9.02	\$5.81	\$9.58	\$7.09
NYC (J)	\$10.97	\$6.42	\$10.37	\$8.16
LI (K)	\$13.38	\$11.17	\$11.84	\$11.02

¹ NYISO, "Buyer Side Mitigation, ICAP forecast - Class Year 2019 Assumptions and References," December 22, 2020, p. 4, available at <https://www.nyiso.com/documents/20142/8363446/ICAP-Buyer-side-Mitigation-Test-Data-Assumptions-Document-Class-Year-2019-December-22-2020/32caa63f-72d8-0258-255d-de201947dca8>.

The quantities of cleared capacity by model year are described in Table 3:

Table 3: UCAP Clearing Quantities (MW) by Capacity Locality and Season, -8% G-J LCR Sensitivity, 2026-2032

Capacity Locality	2026		2032	
	Summer	Winter	Summer	Winter
NYCA	34,418	34,689	34,678	35,115
G-J Locality	11,916	12,467	12,369	13,148
NYC (J)	8,638	9,107	8,792	9,345
LI (K)	4,957	5,176	5,206	5,437

C. Results for -10% G-J LCR Sensitivity

The capacity prices for 2026 and 2032 under the -10% G-J LCR sensitivity are described in Table 4:

Table 4: Capacity Market Clearing Prices (\$/kW-mo) by Capacity Locality and Season, -10% G-J LCR Sensitivity, 2026-2032

Capacity Locality	2026		2032	
	Summer	Winter	Summer	Winter
NYCA	\$5.73	\$4.94	\$6.52	\$6.28
G-J Locality	\$9.02	\$5.81	\$9.58	\$7.09
NYC (J)	\$10.97	\$6.42	\$10.37	\$8.16
LI (K)	\$13.38	\$11.17	\$11.84	\$11.02

The quantities of cleared capacity by model year are described in Table 5:

Table 5: UCAP Clearing Quantities (MW) by Capacity Locality and Season, -10% G-J LCR Sensitivity, 2026-2032

Capacity Locality	2026		2032	
	Summer	Winter	Summer	Winter
NYCA	34,166	34,423	34,480	34,969
G-J Locality	11,664	12,200	12,171	12,936
NYC (J)	8,638	9,107	8,792	9,345
LI (K)	4,957	5,176	5,206	5,437