

Q3 Short-Term Assessment of Reliability (STAR)

COMPREHENSIVE SYSTEM PLANNING



Reliability violations arise in New York City in 2026 and in Long Island in 2027

The 2025 Q3 Short-Term Assessment of Reliability (STAR), covers the five-year period of July 15, 2025, to July 15, 2030, and examines expected peak electricity demand, planned transmission system upgrades, and variations in the mix of power generation to proactively address needs that may arise due to changes to the grid.

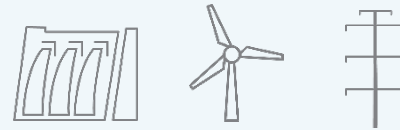
As a result, solutions will be solicited, evaluated, and addressed in accordance with the NYISO Short-Term Reliability Process.

The needs may be addressed with additional generation, demand-side solutions, and/or transmission solutions.

Key drivers impacting reliability margins overall

The reliability needs are driven primarily by the deactivation of certain generators necessary to serve reliability and increasing consumer demand. The STAR also finds that the reliability needs persist without the completion of planned projects, and the risk of deficiencies is even greater when considering a range of plausible futures.

Once the **Champlain Hudson Power Express (CHPE)**, **Empire Wind**, **Sunrise Wind**, and **Propel NY Public Policy transmission project** enter service and provide power as planned, reliability margins improve substantially. However, the margins gradually erode thereafter as forecasted demand for electricity grows.



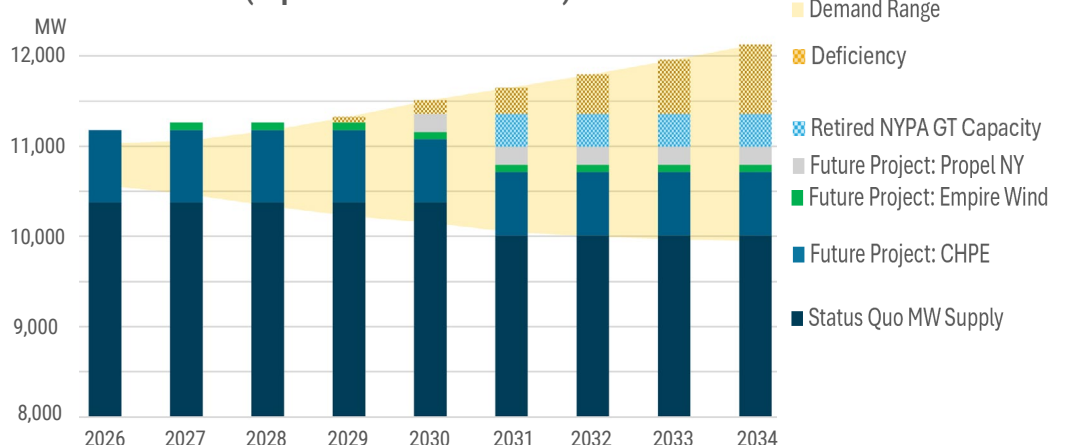
Factors affecting New York City transmission security margin

The New York City reliability need is based on a deficient transmission security margin. Transmission security is the grid's ability to withstand disturbances such as electric short-circuits or unanticipated loss of system elements that can risk the grid's ability to safely and reliably deliver electricity.

The demand forecast accounts for:

- Expected weather
- Population and economic growth
- Energy efficiency
- Installation of behind-the-meter renewable energy resources
- Electric vehicle adoption and charging patterns

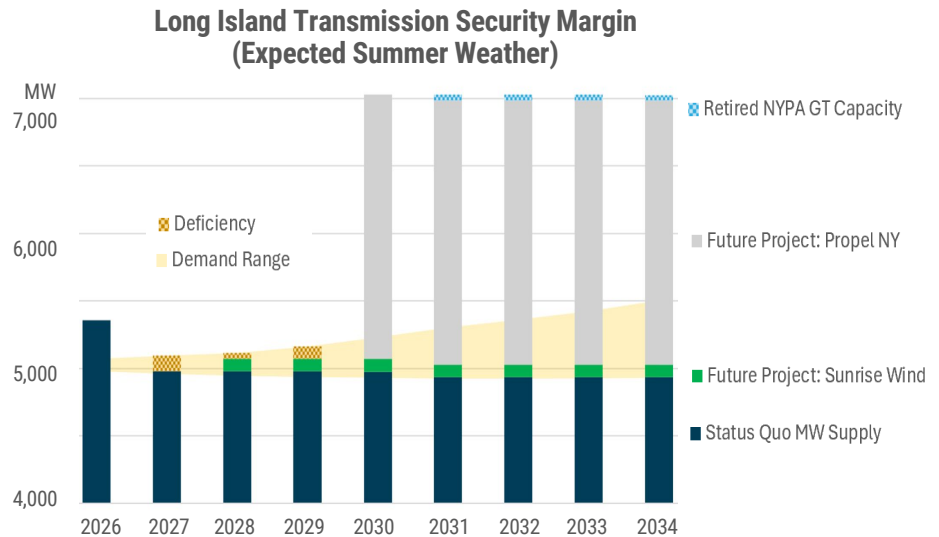
New York City Transmission Security Margin (Expected Summer Weather)



Factors affecting Long Island transmission security margin

The Long Island deficiencies begin in summer 2027 and continue through the five-year study period. The deficiencies are driven by the deactivation of certain generators necessary to serve reliability, increasing consumer demand and risks associated with the in-service dates of key planned projects.

Timing is an essential component of the NYISO's evaluation process. If proposed solutions are not viable or sufficient to meet the identified reliability needs, interim solutions must be in place to keep the grid reliable. This may include retaining select generators through New York State Department of Environmental Conservation's Peaker Rule as well as Reliability Must Run (RMR) agreements. An RMR agreement is a last resort option that is used to ensure that critical generation resources remain operational when their retirement would jeopardize grid reliability. RMR agreements are temporary and limited in duration.



2025 Q3 STAR Next Steps Timeline

NYISO's Tariff defines the course of action the NYISO must follow when a reliability need is identified.

1

November-December 2025



NYISO CALLS FOR BACKSTOP SOLUTIONS FROM CON ED AND LIPA TO ADDRESS RELIABILITY NEEDS

In response to the NYISO's declaration, the affected local utilities will be called upon to propose a backstop solution in case there are insufficient solutions.

2

November-December 2025



NYISO SOLICITS SOLUTIONS

Solutions proposed by developers may include generation and demand response offerings. Parties will have 60 days to submit proposals in response to the solicitation.

3

January-March 2026



NYISO REVIEWS PROPOSED SOLUTIONS

The NYISO reviews proposed market-based solutions and regulated solutions to determine if any are viable to meet the need within the required timeframe.

4

March 2026



NYISO DETERMINES VIABLE SOLUTION

The NYISO selects viable solution(s). If solutions are not sufficient to address the need within the required timeframe, the NYISO will take necessary actions to solve for the reliability needs in New York City and Long Island.

The report highlights how a balanced approach—combining renewable integration, storage deployment, and new or retained dispatchable generation—will be critical to securing a reliable, resilient grid for New York.

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