

A vertical strip on the left side of the page shows a white wind turbine against a blue sky and a row of blue solar panels in the foreground.

2025-2034 Comprehensive Reliability Plan

A Report from the
New York Independent
System Operator

For October 29, 2025 Management Committee

DRAFT – For Discussion Purposes Only

Table of Contents

EXECUTIVE SUMMARY.....	5
Resolution of the Actionable Reliability Need	6
Key Risk Factors Shaping the Grid	7
Planning for a Growing Range of Plausible Futures	10
Recommendations.....	11
Future NYISO Studies	13
BACKGROUND	14
State of the Grid	14
Regulatory Policies Affecting the Grid.....	19
June 2025 Heatwave.....	20
Short-Term Reliability.....	21
2025-2034 COMPREHENSIVE RELIABILITY PLAN.....	23
2024 RNA and Resolution of the 2033 New York City Reliability Need.....	23
Future Projects and Assumptions in the CRP	25
PLANNING FOR A GROWING RANGE OF PLAUSIBLE FUTURES	29
Aging Generation.....	30
Demand-Side Uncertainty.....	33
Large Loads.....	35
Weather Variability.....	37
Reliance on Imports.....	40
Nuclear Relicensing.....	43
Demand Response	44
Potential Transmission and Generation Project Delays	45
Additional Resources	49
Plausible Combinations of System Risks	52
POTENTIAL PATHWAYS TO A RELIABLE GRID	55
Lower Demand Forecast.....	57
Baseline Demand Forecast	58
Higher Demand Forecast.....	60
Reliability Planning Role in Identifying Solutions.....	63
ALIGNING RELIABILITY PLANNING WITH OPERATIONAL REALITIES	64
Lessons Learned from June 2025 Heatwave	64
Resource Planning for Normal Operation.....	65
Comprehensive System Voltage Support	71
THE ROLE OF COMPETITIVE WHOLESALE MARKETS	77
How NYISO’s Wholesale Electricity Markets Work.....	77
Enhancing Wholesale Electricity Market Design.....	78
DER Market Enhancements	78
Flexible Load Models – Large Loads	78
Competitive Power Markets Role in the Transition.....	79
CONCLUSIONS AND RECOMMENDED ACTIONS	80

Table of Figures

Figure 1: NYCA Load Zones	15
Figure 2: Summer Installed Capacity (MW) by Fuel Source – Statewide, Upstate, & Downstate New York: 2025.....	16
Figure 3: Energy Production by Fuel Source (GWh) – Statewide, Upstate, & Downstate New York: 2024.....	17
Figure 4: Statewide Resource Availability: Summer 2025	18
Figure 5: Historical Generating Capacity Fuel Mix in New York State: 2005-2023	19
Figure 6 : Additions and Deactivations Since 2019	20
Figure 7: June Heatwave Load Comparison to Load Forecast	21
Figure 8: New York City Forecast Comparison.....	24
Figure 9: New York City Margin Comparison	25
Figure 10 2026-2034 Demand Forecasts	26
Figure 11: Planned Statewide Generation Mix	27
Figure 12: Planned Generation Additions and Deactivations by Year	27
Figure 13: Range of Statewide System Margins	30
Figure 14: National Average Fossil Generator Age	31
Figure 15: Aging Generation Risk Projection	32
Figure 16: Statewide System Margin Impact of Aging Generation.....	33
Figure 17: Demand-Side Uncertainty.....	34
Figure 18: Statewide System Margin Impact of Demand-Side Uncertainty	35
Figure 19: Large Load Interconnection Projects	36
Figure 20: Statewide System Margin Impact of Large Load Interconnection Projects.....	37
Figure 21: Weather Variability	39
Figure 22: Statewide System Margin Impact of Weather Variability	40
Figure 23: Imports from Neighbors	40
Figure 24: Statewide System Margin Impact of Imports	41
Figure 25: Zone J Transmission Security Margin with Impact of Imports.....	42
Figure 26: Zone K Transmission Security Margin with Impact of Imports	42
Figure 27: NYCA Nuclear Units.....	43
Figure 28: Statewide System Margin Impact of Nuclear Units Not Relicensed	44
Figure 29: Special Case Resources	45
Figure 30: Statewide System Margin Impact of Special Case Resources.....	45
Figure 31: Resource Additions	46
Figure 32: Statewide System Margin Impact of Project Delays	47
Figure 33: Zone J Transmission Security Margin with Impact of Project Delays	48

Figure 34: Zone K Transmission Security Margin with Impact of Project Delays.....	48
Figure 35: Additional Resources from CBA Case.....	49
Figure 36: Statewide System Margin Impact of Additional Resources.....	50
Figure 37: Zone J Transmission Security Margin with Impact of Additional Resources	51
Figure 38: Summer Statewide System Margin Risks.....	52
Figure 39: Winter Statewide System Margin Risks	53
Figure 40: Potential Pathways to a Reliable Grid.....	57
Figure 41: NYCA LOLE with Lower Demand Forecast Table.....	57
Figure 42: NYCA LOLE with Lower Demand Forecast Graph.....	58
Figure 43: NYCA LOLE with Baseline Forecast Table.....	59
Figure 44: NYCA LOLE with Baseline Forecast Graph.....	59
Figure 45: Resource Adequacy Reliability Indices.....	60
Figure 46: 2034 LOLE Results with Impacts of Uncertainty	60
Figure 47: NYCA LOLE with Higher Demand Forecast Table	61
Figure 48: NYCA LOLE with Higher Demand Forecast Graph.....	62
Figure 49: June Heatwave Observations and Planning Recommendations.....	64
Figure 50: Generation Unavailability: June Heatwave vs. Planning Assumptions	65
Figure 51: Comparison of LOLE and Statewide System Margin.....	68
Figure 52: Statewide System Security Margin and LOLE results by study year	68
Figure 53: Comparison of LOLH and Statewide System Margin	69
Figure 54: Statewide System Security Margin and LOLH results by study year.....	69
Figure 55: Comparison of EUE and Statewide System Margin	70
Figure 56: Statewide System Security Margin and EUE results by study year.....	70
Figure 57: Number of Voltage Support Service Calls	73
Figure 58: Statewide Areas of Concern for Voltage Performance.....	74

Executive Summary

New York's electric system faces an era of profound reliability challenges as resource retirements accelerate, economic development drives demand growth, and project delays undermine confidence in future supply. Additionally, 25% of the state's total generating capacity is fossil-fuel-based generation that has been in operation for more than 50 years. As these generators age, they are experiencing more frequent and longer outages.

While this 2025–2034 Comprehensive Reliability Plan (CRP), under current applicable reliability criteria and procedures, identifies no actionable Reliability Needs, this outcome should not be mistaken for long-term system adequacy. The margin for error is extremely narrow, and most plausible futures point to significant reliability shortfalls within the next ten years. Depending on demand growth and retirement patterns, the system may need several thousand megawatts of new dispatchable generation over that timeframe.

The grid is at an inflection point, driven by the convergence of three structural trends: the aging of the existing generation fleet, the rapid growth of large loads, and the increasing difficulty of developing new dispatchable resources. These trends are not isolated, they are compounding. As older conventional plants deactivate, the system loses firm capacity and operational flexibility. At the same time, new demand from data centers, industrial facilities, and electrification is accelerating, placing additional stress on the grid. Meanwhile, the development of new reliable resources is not keeping pace due to permitting challenges, supply chain constraints, and policy uncertainty. The CRP outlines how the NYISO will manage the growing range of emerging risks. To ensure planning outcomes reflect the true reliability risks facing New York, it is essential that the next reliability planning cycle implement a more proactive and expanded framework—one that better integrates a range of demand profiles, operational realities, and the accelerating pace of change in the resource mix.

Resource adequacy is the cornerstone of electric system reliability, ensuring sufficient capacity is available to meet demand under a wide range of conditions, including peak load, weather variability, and unexpected outages. The issue is not simply one of quantity of capacity, but also of quality, timing, and location of those resources' ability to serve load. The system needs resources that can perform reliably during periods of high net load, low intermittent output, and extreme weather. These resources must be dispatchable, flexible, and capable of operating during extended periods of extreme weather and high demand. While renewable generation and battery storage are essential components of the future grid, they are not sufficient on their own to meet all reliability needs. As highlighted in recent NYISO planning studies

and the NYISO's comments on the draft State Energy Plan,¹ the system also requires clean firm capacity resources that can operate independently of weather conditions and provide sustained output when needed to achieve the CLCPA targets. While a diverse mix of resources can collectively provide the reliability attributes needed to maintain system adequacy, persistent development challenges are raising serious concerns about whether the necessary supply will materialize in time to meet growing demand and offset aging generation concerns.

The wholesale electricity markets administered by the NYISO are an important tool to mitigate these risks, as well as attract the necessary investment to facilitate the transition of the grid in the coming decades. These markets are designed, and continue to evolve and adapt, to send appropriate price signals to guide new market entry and retention of resources that assist in maintaining reliability. The potential risks and resource needs identified in the analyses may be resolved by new capacity resources coming into service, construction of additional transmission facilities, increased energy efficiency, integration of distributed energy resources, and/or growth in demand response participation. New York's competitive wholesale electricity markets continue to serve as a critical mechanism for efficiently attracting and retaining the resources needed to maintain reliability. Strategic coordination between market design, planning, and policy will be essential to address emerging reliability risks and support a resilient energy transition. Evolving reliability considerations identified through the planning processes will continue to be critical inputs when the NYISO considers market design.

Resolution of the Actionable Reliability Need

The 2025-2034 CRP follows the recently completed 2024 Reliability Needs Assessment (RNA) published in December 2024. The 2024 RNA identified an actionable Reliability Need beginning in summer 2033 within New York City, growing to a deficiency of 97 MW for three hours on the peak day in 2034. This deficiency was identified in the "baseline assessment," which accounted for a single baseline forecast of system conditions. Prior to soliciting proposed solutions to address the need, in May 2025 the NYISO incorporated post-RNA system updates, specifically a 200 MW decrease in the baseline 10-year New York City demand forecast. These updates addressed the identified Reliability Need according to the current Reliability Planning Process and, therefore, a solicitation for solutions was not required for this CRP.

Subsequent to the resolution of the 2033 Reliability Need, the NYISO found different, but related, Generator Deactivation Reliability Needs first arising in summer 2026. The 2025 Quarter 3 Short-Term Assessment of Reliability (STAR) identified these needs in New York City and Long Island driven by

¹ See "Resources: Pathways to Policy Achievement" in the 2023-2042 System & Resource Outlook ([here](#)); see also Comment of the New York Independent System Operator on the Draft State Energy Plan (October 6, 2025) ([here](#)).

generator deactivations in combination with demand forecasts based on expected weather, expected generator availability, transmission limitations, and risks associated with the availability of key future planned projects. As a result, solutions will be solicited, evaluated, and addressed in accordance with the Short-Term Reliability Process.

As demonstrated by the study-by-study fluctuation in the system conditions and associated risks, the NYISO's current approach in evaluating the reliability of the system is no longer sufficient for future planning studies. Relying on a single baseline forecast to determine whether a Reliability Need exists does not reflect the growing range of combinations of demand, resource availability, and system conditions. As this CRP demonstrates, many plausible futures show significant reliability shortfalls within the next ten years—even when the baseline appears adequate. If these risks materialize without timely action, the consequences could extend beyond operational challenges to widespread impacts on public safety, property, and economic activity. To ensure timely solutions, NYISO must evolve its methodology so that Reliability Needs are identified under a broader range of credible combinations of system conditions, not just a single deterministic case. This change is essential to move from a reactive posture to a proactive planning framework that anticipates risk and enables investment before reliability margins disappear.

Key Risk Factors Shaping the Grid

While New York's energy transition is accelerating, the pace and sequencing of change introduce risks that cannot be ignored. For several cycles of the Reliability Planning Process, the CRP has evaluated various scenarios to identify key trends and potential vulnerabilities that pose risks to the reliability of the New York grid.

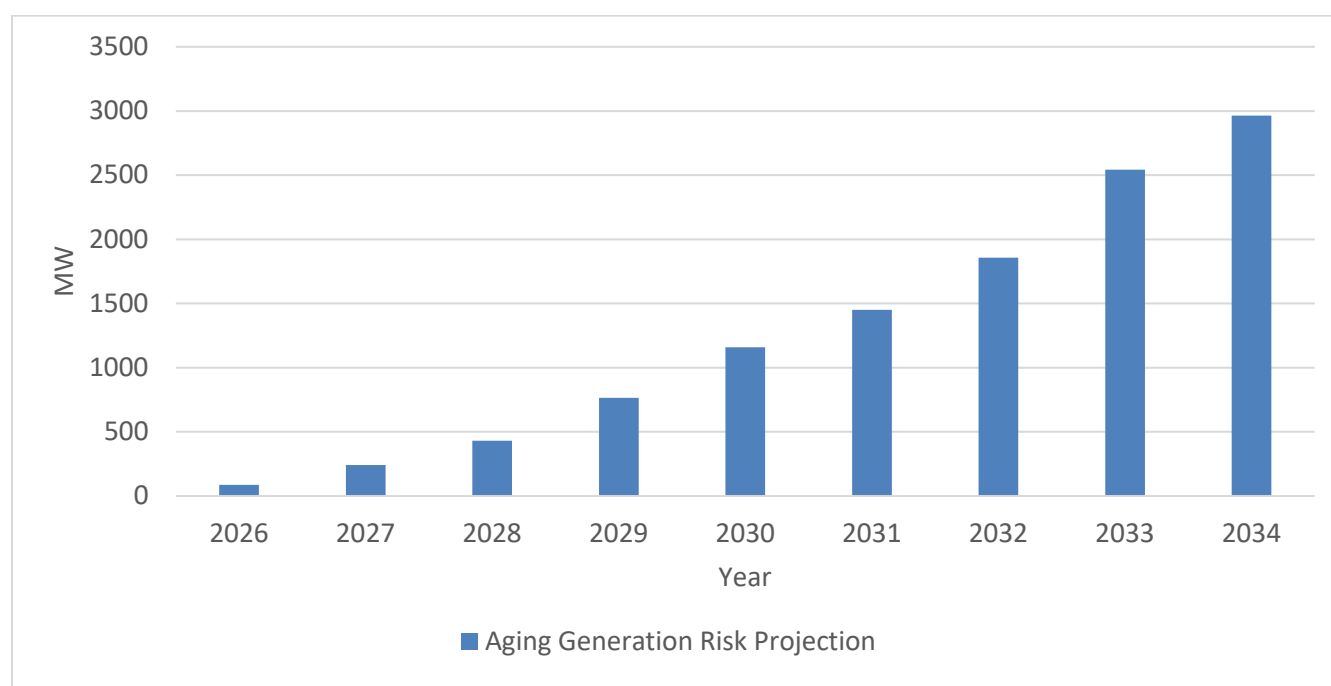
The NYISO has identified a growing range of emerging risks across generation, demand, and transmission that could significantly affect system reliability. Aging thermal plants, volatile demand driven by electrification and large industrial loads, and the potential for delays in major renewable and transmission projects all contribute to a more complex and less predictable operating environment. The range of possible outcomes based on variations in evolving data, detailed below, are no longer theoretical—they are materializing now, and their combined impact could challenge the reliability of the New York grid if not addressed proactively.

Reliance on Aging Generation

New York's generation fleet is among the oldest in the country. Roughly 25% of the state's total generating capacity is fossil-fuel-based generation that has been in operation for more than 50 years, well beyond the age at which similar units have been deactivated across the country. Seven percent of New York's fleet is 70 years or older.

As these generators age, they are experiencing more frequent and longer outages as well as potential for catastrophic end of life damage. Greater difficulties in maintaining older equipment, combined with the impact of policies to restrict or eliminate emissions, are driving aging generators to deactivate or be unavailable due to an end-of-life failure, which would exacerbate declining reliability margins. To account for aging generation, this CRP assessed the risk of end-of-life failures for generating units as they advance in age. The NYISO first analyzed the data of the nationwide generation fleet and developed a methodology to incorporate the risk. As a result, approximately 3,000 MW of New York’s existing conventional fossil-fuel generation was identified as likely to be unavailable by 2034, approximately 60% of which is in New York City.

Aging Generation Risk Projection



Large Loads and the Impacts on Future Demand

The range of future outcomes with regard to future demand is growing. Beyond the expected growth from electric vehicles, building electrification, and economic trends, the surge in large semiconductor manufacturing plants and data center projects is reshaping the demand outlook. At the end of 2024, the NYISO interconnection queue included roughly 4,000 MW of large load projects, averaging 175 MW per project. By September 2025, that figure has more than doubled to over 10,000 MW to be in service prior to 2031, with projects averaging in size of 285 MW. Upstate New York in particular appeals to these economic development projects due to the region’s strengths, such as accessibility to high quality labor, land, and promotion of job creation.

Though not every project will materialize, the speed and scale of these requests far outpace the development of new supply. This imbalance creates a significant reliability risk: large loads can come online quickly, but the resources needed to serve them—generation, transmission, and storage—require years to plan, permit, and build. Without proactive measures, this dynamic could erode reliability margins well before the end of the decade.

Reliance on Imports

While imports from neighboring systems are assumed in baseline planning, real-world conditions may limit their availability during peak events. During the June 2025 heatwave, New York faced significant curtailments of scheduled imports as neighboring systems prioritized their own needs. As the NYISO's reliability margins grow tighter throughout the planning horizon, each of its neighbors—PJM, Ontario, Quebec, and New England—are projecting similar trends, which means emergency assistance or even firm imports may not be available when New York needs them most.

Extreme Weather and Seasonal Peaks

NYISO incorporates weather variability into its reliability assessments, and 2025 has already delivered conditions beyond those design expectations. In January and June 2025, operators faced cold snaps and heatwaves that resulted in emergency conditions beyond what NYISO traditionally accounts for in its actionable baseline assessments.

Winter reliability is emerging as a growing concern. Summer peaks have traditionally driven planning, and winter conditions now present comparable risks. Electrification of heating is increasing winter demand, while the availability of gas-fired generation during cold snaps remains uncertain due to non-firm fuel contracts. Recent events underscore this vulnerability: the January 2025 cold snap pushed the system near its operational limits, highlighting how extreme weather combined with constrained fuel supply can quickly erode reliability margins. As winter peaks rise and the system becomes more dependent on intermittent resources, ensuring firm capacity and fuel security during prolonged cold periods will be critical to maintaining reliability.

Delays in Planned Projects

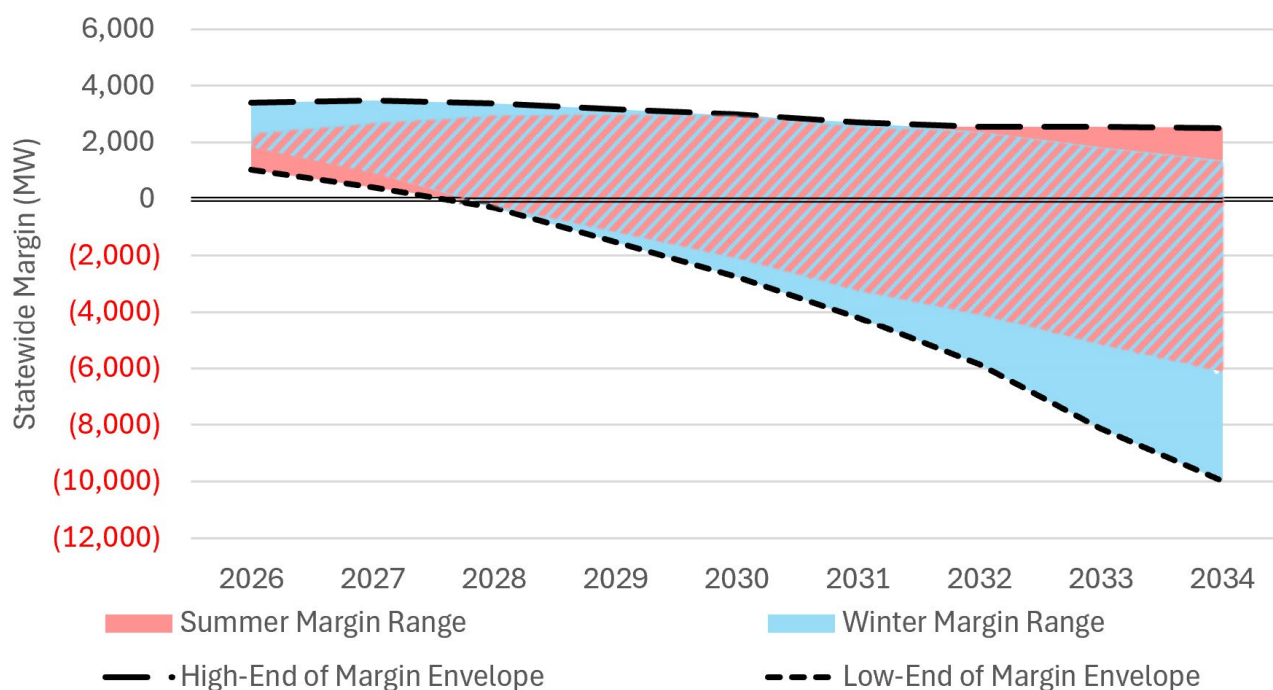
Delays in transmission and generation projects would pose risks to future reliability. The CRP's analysis shows that timely completion of major transmission and generation projects is essential to maintaining reliability through the next decade. Projects such as the Champlain Hudson Power Express (CHPE), the Propel NY Alternate 5 transmission project, and planned renewable and storage resources are foundational to the state's future grid. Delays in these projects would significantly reduce system flexibility and could lead to statewide and local resource deficiencies. Given the long lead times for permitting,

construction, and interconnection, even modest delays can have outsized impacts on reliability, particularly as demand grows and aging generation retires.

Planning for a Growing Range of Plausible Futures

Future system conditions will be shaped by multiple interacting risk factors. While any one of these previously mentioned individual risks could eliminate the very small reliability margins found in the RNA, they cannot be assessed in isolation. Instead, the NYISO conducted scenario-based analyses to evaluate how combinations of system conditions could compound and lead to critical reliability shortfalls. The chart below depicts the range of statewide system margins under normal operating conditions for a variety of sensitivities. This illustrates how plausible changes in forecasted demand, generation, or transmission can stack up to provide sufficient surpluses or significant deficiencies – up to 10,000 MW – when the forecasted reliability margins are already so tight. It is worth noting that as the statewide system margin narrows, the NYISO has found transmission security violations due to tightening conditions even when the statewide system margin is still positive.

Plausible Range of Statewide System Margins



The combined effect of multiple potential outcomes is striking. Most plausible combinations modeled in this CRP result in statewide deficits by 2034 in both summer and winter, with shortfalls of several thousand megawatts. Even scenarios that assume mitigation measures—such as new renewable additions, battery storage, and retention of select resources—still fall short under higher demand growth or accelerated retirements of aging generation. These outcomes highlight that incremental actions cannot fully offset the loss of core system capabilities or the pace of demand expansion.

This CRP demonstrates that reliability challenges are not inevitable—they can be addressed with timely, coordinated action. As margins tighten and risks compound, the analysis points to clear pathways for maintaining system reliability while advancing New York’s clean energy objectives.

First, **accelerating the entry of resources already in the development pipeline** is essential. Projects in the interconnection queue—representing thousands of megawatts of solar, wind, and storage—can significantly improve reliability if they reach commercial operation on schedule. However, even full delivery of these projects does not fully resolve deficiencies under higher-risk futures.

Second, **preserving or replacing critical dispatchable capability** will be necessary. Resources such as NYPA’s small gas plants provide fast-start flexibility and voltage support that intermittent resources cannot yet replicate. Retaining these capabilities—or substituting functionally equivalent solutions—offers meaningful reliability benefits, particularly in constrained areas like New York City and Long Island.

Finally, **additional firm capacity will be required**. Depending on demand growth and retirement patterns, the system may need several thousand megawatts of new dispatchable generation by the 2030s. These resources will complement renewables and storage, ensuring the grid can respond to prolonged stress conditions and maintain essential reliability services.

The message is clear: **planning and investment must begin now**. Long lead times for permitting, equipment procurement, and construction mean that decisions made today will determine whether the system can meet reliability standards by the next decade. 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.

Recommendations

The reliability challenges outlined in this CRP require a shift from incremental adjustments to a comprehensive, forward-looking planning approach. Tight margins and compounding risks mean that traditional methods built around a single expected future are no longer sufficient. To maintain system reliability and protect public safety, economic activity, and quality of life, NYISO recommends actions that

strengthen planning across a broad spectrum of plausible outcomes, improve energy adequacy metrics, and accelerate solutions for resource and voltage performance. These recommendations are designed to move the grid from a reactive posture to a proactive framework that anticipates risk and enables timely investment before reliability margins disappear.

- **Take action to account for a wider range of plausible outcomes in reliability planning.** This CRP shows that key factors that affect the New York transmission system, either by itself or combined with others, will have consequential impacts to reliability that current planning methods do not fully capture. Today's approach assumes a single expected future, but the analysis shows that this is no longer sufficient. NYISO must evolve its methodology so that Reliability Needs are identified earlier and more accurately under a broader range of conditions, enabling timely solutions that the NYISO needs to be able to plan for through the identification of solutions. Specifically, the NYISO recommends adopting the following scenario planning concepts into the formal procedures for determining actionable Reliability Needs:
 - evaluate a wider range of plausible emerging risks (e.g., possible delays to planned projects, reduced imports, etc.), rather than relying solely on a deterministic base case;
 - incorporate the probability of aging generation or catastrophic failures, recognizing that these risks grow significantly over time; and
 - use a range of plausible demand forecasts, accounting for economic trends, electrification, demand-side policy adoption, and technology-driven behavior changes.
- **Strengthen reliability planning beyond emergency measures.** Operational experience from the June and July 2025 heatwaves revealed how quickly tight resource margins and limited system flexibility can lead to stressed conditions, even when overall resource adequacy appears sufficient. Current criteria measure resource adequacy only after assuming the full utilization of emergency operating procedures, effectively planning for operators to rely on extraordinary measures as routine practice. This approach leaves fewer tools available when real-time conditions deteriorate. Recent focus in New York and the wider industry recognizes that more consideration is needed for non-peak hours given the changing resource mix and load profiles. The NYISO recommends that additional metrics, such as expected unserved energy (EUE), be utilized to determine statewide reliability with consideration of normal operating conditions, ensuring planning reflects the true resilience of the system rather than its dependence on emergency actions.
- **Structure a multifaceted approach to address resource shortfalls.** This CRP identifies scenarios where statewide deficiencies could exceed 4,000 MW by the early 2030s, driven by demand growth and retirements of aging generation. Historically, regulated solutions have focused on transmission, but future reliability needs will increasingly require new or repowered generation resources—in addition to wires. NYISO's role is to signal reliability risks early, enable the interconnection of supply-side solutions, and work with stakeholders to ensure market mechanisms and regulated backstop options can deliver timely solutions. However, many barriers lie outside NYISO's control, including permitting timelines, siting restrictions, supply chain constraints, and financing hurdles that slow resource development.

These challenges underscore the need for policy alignment and streamlined approvals to complement NYISO's ongoing planning and market efforts.

- **Deploy a comprehensive strategy to address system voltage performance.** For years, the New York transmission system was designed around expected flow patterns—predominantly west to east and north to south. With the rise of distributed energy resource (DER) growth and new investments in transmission, these flow patterns have become less predictable and, therefore, making voltage control more challenging. Planning studies now show the growing need for voltage support, especially with more renewable integration, large data centers, and higher demand growth upstate. This CRP recommends the development of a system-wide plan for dynamic voltage control devices, which would be more efficient and flexible than addressing each issue with separate upgrades.

Given the confluence of factors that the system faces, enhancements to the NYISO's reliability planning processes are essential and must be undertaken now. The NYISO will discuss the recommendations listed above with stakeholders prior to the start of the 2026 cycle of the Reliability Planning Process. To the extent applicable, some recommendations may require changes to the Reliability Planning Process Manual, the Open Access Transmission Tariff, and coordination with the New York State agencies and the New York State Reliability Council.

Future NYISO Studies

Through the Short-Term Reliability Process, the NYISO will conduct quarterly Short-Term Assessments of Reliability (STARs) to assess reliability needs within a five-year horizon. If necessary, the NYISO will seek solutions to address any reliability needs identified through that process. The next cycle of the Reliability Planning Process will begin in 2026, for which preparations will begin later this year. The *2026 Reliability Needs Assessment* will provide a new reliability assessment based on updated system models and assumptions and will review, among other things, the status of the risk factors discussed in this CRP. Consistent with its commitment to transparency and stakeholder engagement, the NYISO will discuss the key 2026 RNA assumptions and implementation of the above recommendations with stakeholders.

The NYISO is currently undertaking a 20-year System & Resource Outlook (the "Outlook"), which will be issued in 2026. The 2025-2044 Outlook will provide a comprehensive overview of system resources and transmission constraints throughout New York, highlighting opportunities for resource and transmission investment driven by economics and public policy. Together, this CRP and the Outlook are the marquee NYISO planning reports that provide a comprehensive future power system outlook to stakeholders, developers, and policymakers.

Background

This *2025-2034 Comprehensive Reliability Plan* (CRP) completes the 2024-2025 cycle of the NYISO's Reliability Planning Process. The 2024 Reliability Needs Assessment ([RNA](#)), approved by the NYISO Board of Directors in November 2024, was the first step of the current cycle. This CRP follows the 2024 RNA and provides the regional transmission plan, incorporating findings and solutions from the quarterly Short-Term Reliability Process, as available, to maintain reliability over the ten-year planning horizon.

This section provides an overview of the current state of New York's electric grid, recent operational events, and findings from short-term reliability planning studies. Together, these elements offer context for understanding the system's evolving reliability landscape and inform the longer-term outlook presented in the CRP.

State of the Grid

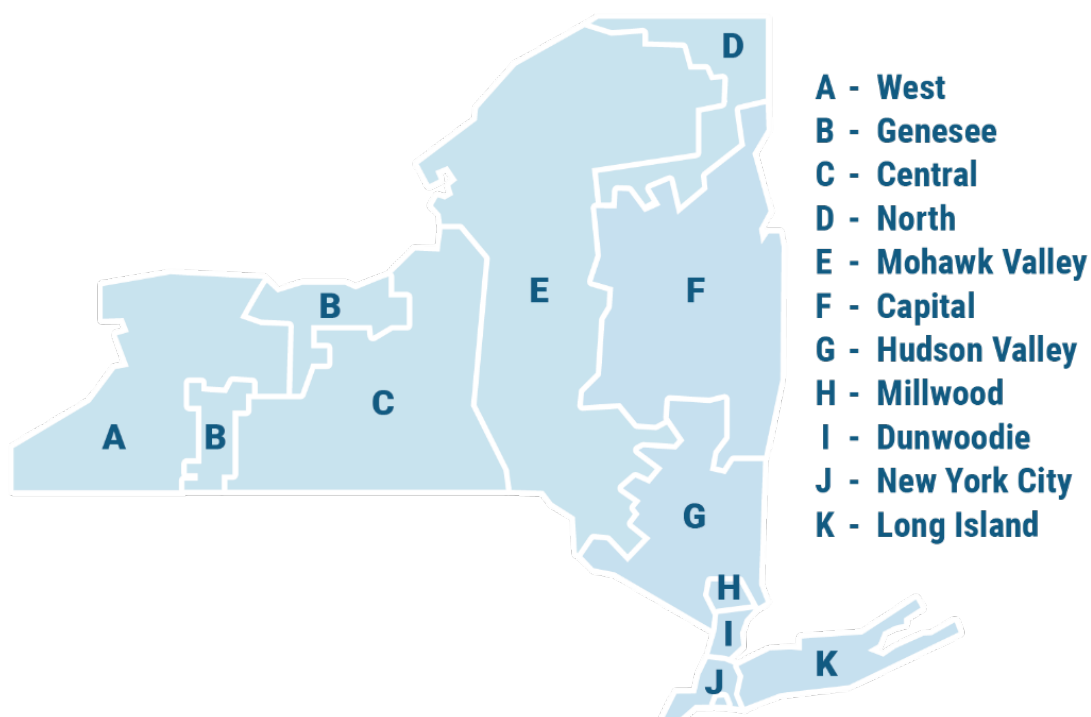
New York's power grid is dramatically changing how it serves consumers and is evolving to meet the state's clean energy objectives. The NYISO offers two annual publications—the *Load & Capacity Data Report*² (Gold Book) and *Power Trends*³—that provide independent sources of information and analysis on New York's electric system.

The New York Control Area (NYCA) is comprised of 11 geographical zones from western New York (Zone A) through Long Island (Zone K). At various points, this CRP refers to these zones to provide locational details regarding system demand, projected resource mixes, and anticipated transmission constraints. A map of the NYCA zones is shown in Figure 1.

² [2024 Load & Capacity Data Report \(Gold Book\)](#)

³ [2024 Power Trends](#)

Figure 1: NYCA Load Zones



A summary of the current system resources is provided below. Figure 2 depicts the projected mix of resource capacity that was expected to be available for the 2025 summer capability period, and Figure 3 provides the energy production by fuel sources in 2024.

Figure 2: Summer Installed Capacity (MW) by Fuel Source – Statewide, Upstate, & Downstate New York: 2025

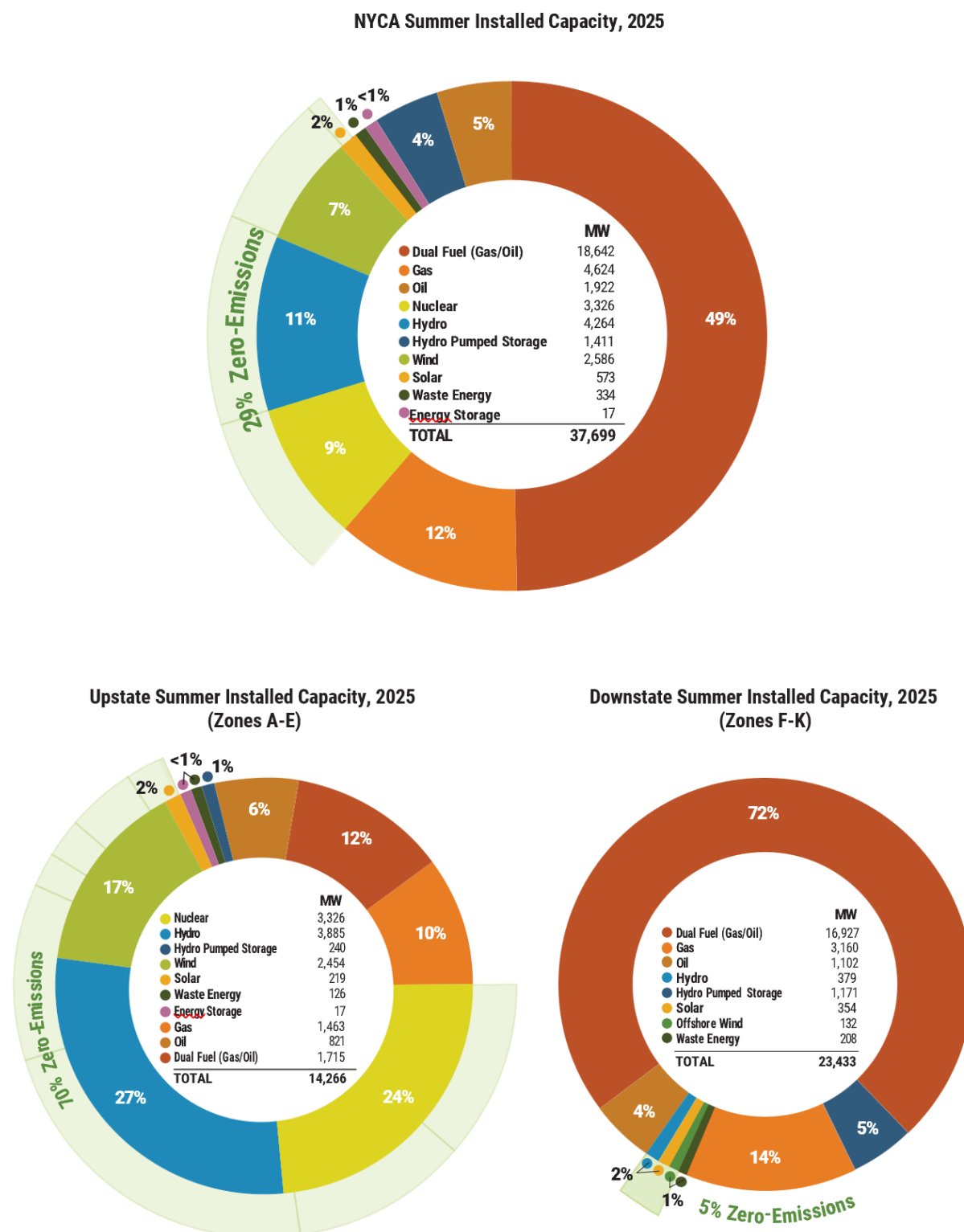
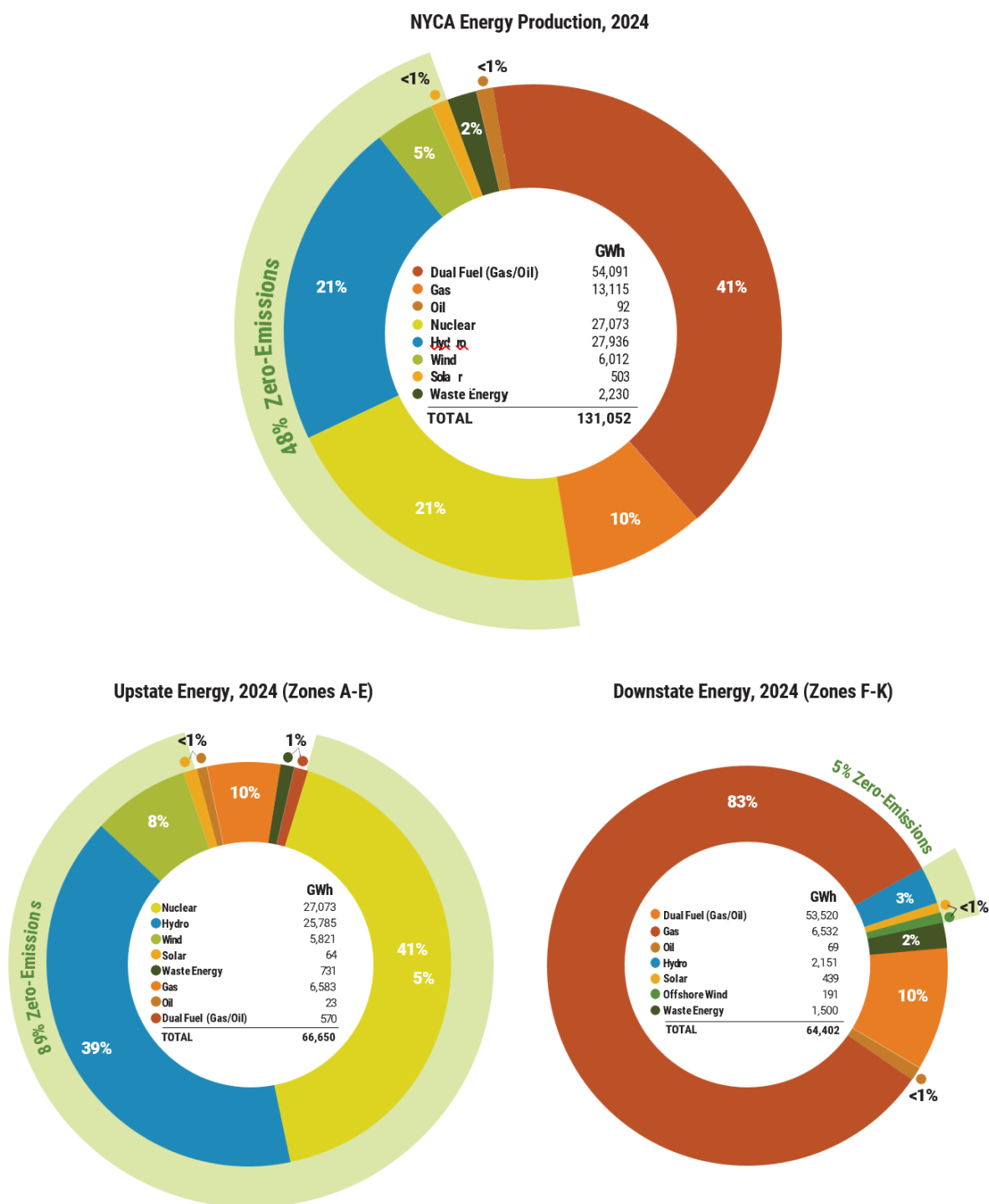


Figure 3: Energy Production by Fuel Source (GWh) – Statewide, Upstate, & Downstate New York: 2024



The total resource capability in the NYCA for the summer of 2025 was projected to be 40,910 MW, which includes 37,654 MW of generating capability, 1,487 MW of demand response, and 1,769 MW of net long-term purchases and sales with neighboring control areas.

The New York system's minimum Installed Reliability Margin (IRM) is established every year by the New York State Reliability Committee (NYSRC). The IRM represents the minimum level of capacity, beyond the forecasted peak demand, which must be procured to serve consumers. The IRM is established every year for each following capability year (May 1 through April 30) and is used to quantify the minimum capacity required to meet the Northeast Power Coordinating Council (NPCC) and NYSRC resource adequacy rules. The NYISO, in assisting NYSRC, analyzes forecasted demand, supplier performance, transmission capability, and factors such as extreme weather, to measure the grid's ability to meet reliability requirements. NYSRC has noted in several of its annual *Installed Capacity Requirement Technical Study* reports⁴ that the inclusion of intermittent resources to the grid is a leading factor in establishing higher IRM requirements. The IRM for the May 1, 2025 - April 30, 2026 capability year is 24.4% of the forecasted NYCA peak load, representing an increase from the 22% established last year.

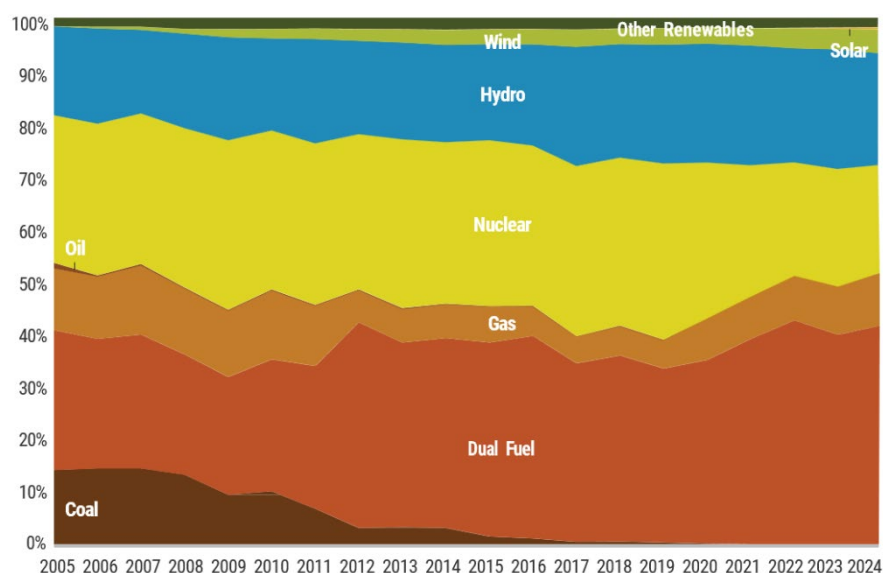
Figure 4: Statewide Resource Availability: Summer 2025



The historical generating capacity fuel mix in New York State from 2000 through 2023 is depicted in the Figure 5 below.

⁴ NYSRC's IRM Reports: https://www.nysrc.org/NYSRC_NYCA_ICR_Reports.html.

Figure 5: Historical Generating Capacity Fuel Mix in New York State: 2005-2023

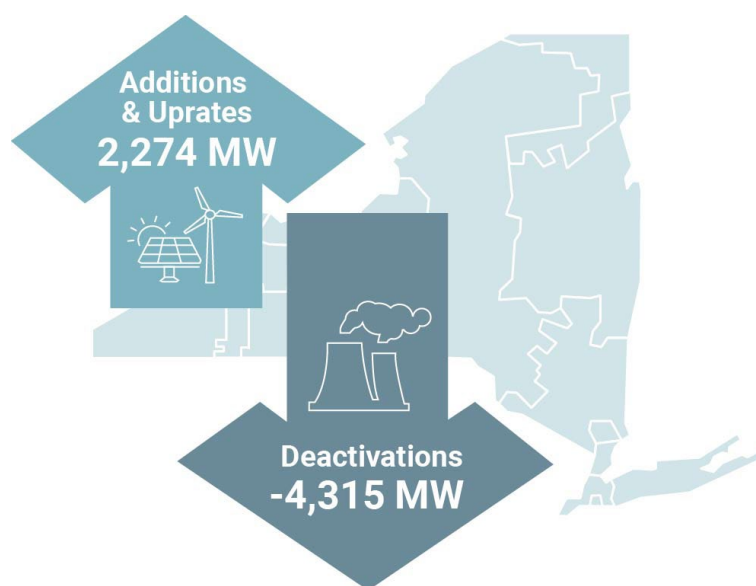


Regulatory Policies Affecting the Grid

Increasingly ambitious environmental and energy policies, evolving market rules, technological advancements, and economic factors impact the decisions by market participants and are accelerating the transition in the state's resource supply mix. During this transition, the pace of both the addition of new resource additions and the retirement of older, higher-emitting resources are projected to exceed historical levels. Changes to demand patterns and the generation fleet driven by federal, state, and local government regulatory programs may impact the operation and reliability of New York's bulk power system. Compliance with federal and state regulatory initiatives and environmental and permitting requirements may require investment by the owners of New York's existing thermal power plants in order to continue operation. If the owners of those plants must make significant investments to comply, the increased cost to continue operating could lead to the retirement of these resources needed to maintain the reliability of New York's bulk power system and, therefore, could necessitate replacement.

Balancing the grid throughout this transition not only requires maintaining sufficient capacity to meet demand but also requires that new resources entering service comparably replace the capabilities and attributes of the resources leaving the system (e.g., fast starting/ramping and dispatchable both up and down, available when and for as long as needed, providing essential reliability services such as voltage and frequency control, support system's stability during disturbances). Continued dialogue and engagement among Market Participants, policymakers, and the NYISO will be essential to support the planning processes in order to identify the needs and services required to maintain a reliable system during and after this transition period.

Figure 6 : Additions and Deactivations Since 2019



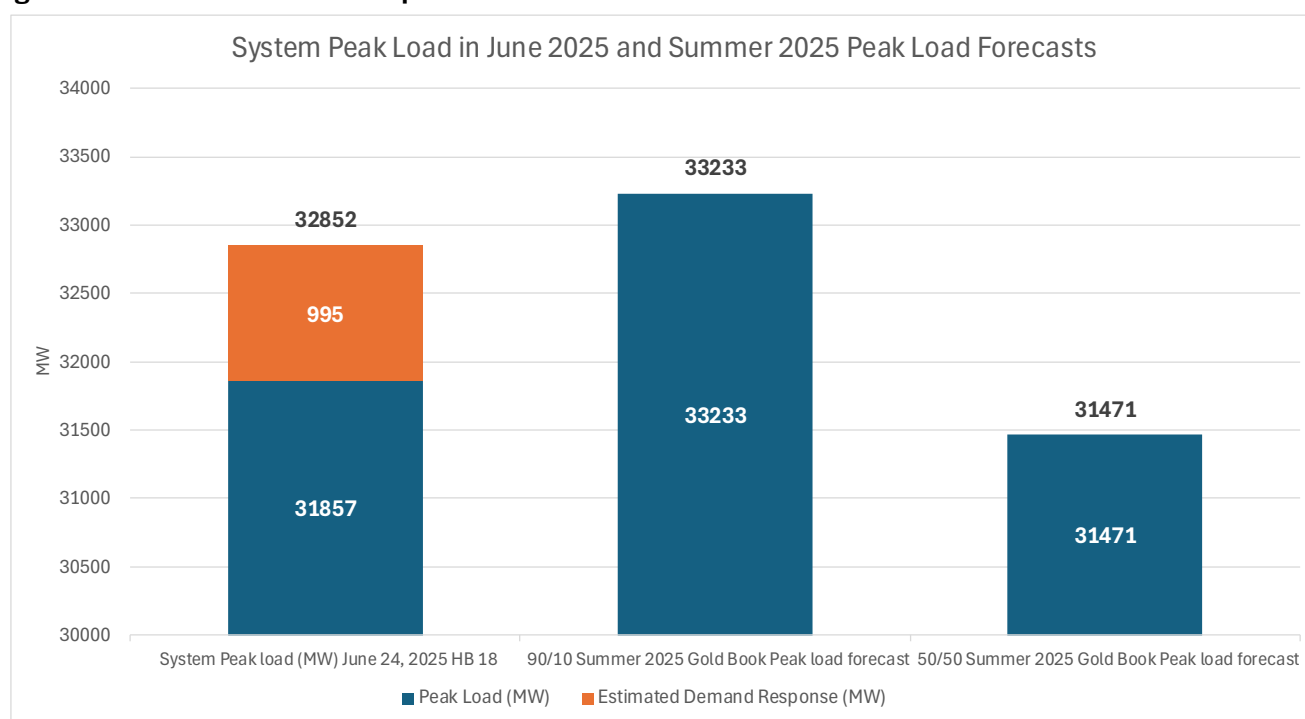
June 2025 Heatwave

Between June 23 and 25, 2025, the NYISO experienced one of the most challenging operating conditions in recent years as New York and much of the Eastern Interconnect experienced a heat wave⁵. This section provides details of system conditions, operational actions, and resource performance during the event, offering context for understanding the reliability risks and planning implications in the CRP.

On June 24, 2025, peak net load reached 31,857 MW during the hour beginning 18:00 (HB18), after reductions of 995 MW of demand response. Without demand response reductions, the load would have been just 381 MW below the 90/10 forecast (33,233 MW). The gross load for HB16 on June 24 was 34,491 MW and actually higher than HB18, but 2,675 MW of BTM solar and 1,096 MW of demand response reduced the net load, delaying the system peak load hour by two hours due to the solar and demand response contributions.

⁵ More information can be found in NYISO Summer 2025 Hot Weather Operations presentation ([here](#)).

Figure 7: June Heatwave Load Comparison to Load Forecast



The NYISO declared a “Major Emergency” for a little over an hour and half on the evening of June 24th due to operating reserve deficiencies based on the following:

- Approximately 7,000 MW of capacity was unavailable at the peak load hour;
- Approximately 2,000 MW of external imports were curtailed from PJM, ISO-NE, and IESO limited import capability. The NYISO curtailed exports to ISO-NE and PJM;
- The NYISO procured 1,960 MW of emergency energy from neighbors; and
- Voltage reduction measures were counted as operating reserve, and demand response programs (EDRP/SCR) were activated across all zones.

Short-Term Reliability

The NYISO’s Short-Term Reliability Process works in parallel with the longer-term Reliability Planning Process, providing updates and assessments that occur more frequently than the two-year reliability planning cycle, including Generator Deactivation Assessments. Findings from quarterly Short-Term Assessments of Reliability are incorporated into the CRP to ensure that recent developments are reflected in the longer-term outlook and planning assumptions.

The *Short-Term Assessment of Reliability: 2023 Quarter 2 (“2023 Q2 STAR”)*⁶ and the *Short-Term*

⁶ Short-Term Assessment of Reliability: 2023 Quarter 2, available at <https://www.nyiso.com/documents/20142/39103148/2023-Q2-STAR-Report-Final.pdf>.

*Assessment of Reliability: 2025 Quarter 3 (“2025 Q3 STAR”)*⁷ are particularly noteworthy because they identify and address specific reliability impacts and expected changes to future demand forecasts.

In 2019, the New York State Department of Environmental Conservation (DEC) enacted regulations to limit Nitrogen Oxide (NO_x) emissions, which has become known as the “Peaker Rule.” This resulted in 1,027 MW of affected fossil-fired generators being deactivated or limited as of May 1, 2023 and an additional 590 MW becoming unavailable by May of 2025, unless a fossil-fired generator is identified as necessary to ensure the reliability of the system.

The *2023 Q2 STAR*, issued on July 14, 2023, identified a Short-Term Reliability Process Need due to a deficiency of up to 446 MW within New York City, resulting in violations of transmission security criteria, beginning in summer 2025. The need was driven by a combination of forecasted increases in peak demand and the assumed unavailability of certain generation in New York City affected by the “Peaker Rule.”

In accordance with the Short-Term Reliability Process, the NYISO issued a solicitation for solutions seeking solutions to resolve the reliability need. The NYISO determined that the Gowanus 2 & 3 and Narrows 1 & 2 generation units, which have a combined capacity of 508 MW, were necessary to continue to operate in order to satisfy the transmission security margin and maintain reliability of the system. As a result, the NYISO’s designated these generation plants as necessary for reliability, which allowed their continued operation beyond May 2025, consistent with provisions in the “Peaker Rule.” The NYISO described the continued operation of the Gowanus and Narrows units in the STAR as a temporary solution until the CHPE transmission project enters service and fully addresses the need for the remainder of the STAR’s five-year study period.

In the 2025 Quarter 3 STAR, the NYISO evaluated the proposed deactivations of Gowanus and Narrows in New York City and Pinelawn (82 MW) and Far Rockaway GTs (121 MW) in Long Island. The STAR concluded that the New York City and Long Island localities would be deficient for summer peak conditions without completion and energization of future planned projects (CHPE, Empire Wind, Propel NY Public Policy Transmission Project, and Sunrise Wind). The bulk system deficiencies are driven by the deactivations in combination with demand forecasts based on expected weather, expected generator availability, transmission limitations, and risks associated with the availability of key future planned projects. As a result, solutions will be solicited, evaluated, and addressed in accordance with the Short-Term Reliability Process. These Generator Deactivation Reliability Needs may be addressed with generation solutions, demand-side solutions, and/or transmission solutions.

⁷ Short-Term Assessment of Reliability: 2025 Quarter 3, available at <https://www.nyiso.com/documents/20142/39103148/2025-Q3-STAR-Report-Final.pdf>.

2025-2034 Comprehensive Reliability Plan

The Comprehensive Reliability Plan to reliably serve New York demand for the 2025-2034 timeframe requires forecasting the balance between demand, generation, and transmission and managing growing uncertainty. This CRP is outlined in the following sections:

- **Comprehensive Reliability Plan (this section):** This section summarizes the findings of the 2024 RNA and describes the resolution of the identified Reliability Need in New York City. It also presents key future projects and planning assumptions that form the baseline conditions for the CRP. These baseline assumptions serve as reference points for scenario analyses conducted throughout the remainder of the plan, which explore uncertainties and associated reliability risks.
- **Planning for a Growing Range of Plausible Futures:** To better understand the range of possible futures, the CRP examines the key system factors—i.e., aging generation, demand, weather variability, imports, project delays, demand response, and additional resources—and their individual influence on system performance. The CRP then further examines combinations of these plausible outcomes and highlights how different plausible configurations can impact system reliability margins. This section uses statewide system margin calculations to quantify the relative and combined impacts of the different uncertainties.
- **Potential Pathways to a Reliable Grid:** The CRP explores certain combinations of demand and aging generation risks to gauge when, and under what conditions, Reliability Needs could be identified in the future. If scenarios are found to violate criteria, different scenarios of resource additions are modeled to demonstrate potential solution sets.
- **Aligning Reliability Planning with Operational Reliability:** The CRP examines (a) lessons learned from the June 2025 heatwave, (b) resource planning for normal conditions, and (c) comprehensive need for system voltage support. Together, these observations point to the need for a planning framework that better reflects operational realities and anticipates emerging reliability risks.
- **The Role of Competitive Wholesale Markets:** This section summarizes how the NYISO's wholesale markets are also designed to attract and retain enough supply to provide needed reliability services. The NYISO has identified certain key market enhancements to maintain the alignment between emerging reliability needs and market incentives—in particular, ongoing efforts to enhance distributed energy resource market and flexible load modeling.

2024 RNA and Resolution of the 2033 New York City Reliability Need

The 2024 RNA evaluated the reliability of the New York bulk electric grid from 2028 through 2034, considering forecasts of peak power demand, planned upgrades to the transmission system, and changes to the generation mix. The RNA assesses a “base case” set of assumptions to identify actionable Reliability

Needs if there is a violation of applicable Reliability Criteria. Based on the base case assumptions, the 2024 RNA identified a Reliability Need beginning in summer 2033 within New York City primarily driven by a combination of forecasted increases in peak demand, limited additional supply, the assumed retirement of the NYPA small gas plants based on state legislation, and the assumed unavailability of generators impacted by the DEC Peaker Rule. Accounting for these factors, the RNA initially found that the New York State Bulk Power Transmission Facilities (BPTF) will not be able to securely and reliability serve the forecasted demand in New York City. When accounting for forecasted economic growth and policy-driven increases in demand, the 2024 RNA found that New York City (Zone J) will be deficient starting in summer 2033 by as much as 17 MW for 1 hour and increasing to 97 MW for 3 hours in summer 2034 on the peak day during expected weather conditions.

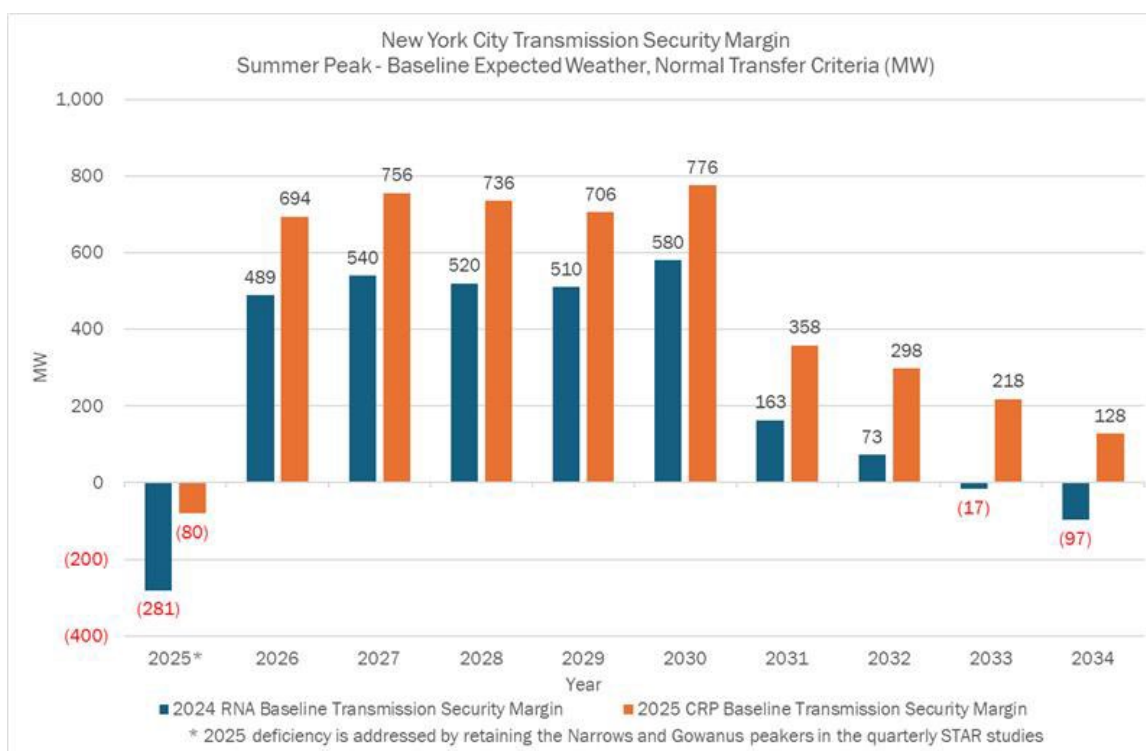
After the completion of the 2024 RNA, the NYISO considered relevant updates to Local Transmission Owner Plans (LTPs) and other system updates to determine if the Reliability Need is reduced or eliminated in accordance with its procedures. Following the release of the 2024 RNA, the 2025 Load & Capacity Report (“Gold Book”) included the latest forecast and generation Dependable Maximum Net Capacity. The updated New York City peak demand forecast was roughly 200 MW lower each of the next ten years over the 10-year planning horizon compared to the 2024 Gold Book’s forecasts used in determining the New York City Reliability Need.

Figure 8: New York City Forecast Comparison

Comparison of 2024 Zone J Goldbook Forecast and 2025 Preliminary Zone J Forecast										
Item	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Zone J Baseline Demand Forecast (2024 Goldbook) (MW)	10,960	10,990	11,020	11,040	11,050	11,080	11,130	11,220	11,310	11,390
Zone J Baseline Demand Forecast (Preliminary 2025 Goldbook) (MW)	10,764	10,790	10,820	10,840	10,860	10,880	10,930	11,010	11,080	11,170
Impact to Transmission Security Margin (MW)	+196	+200	+200	+200	+190	+200	+200	+210	+230	+220
Item	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Zone J Higher Demand Forecast (2024 Goldbook) (MW)	11,140	11,270	11,400	11,530	11,660	11,800	11,940	12,100	12,260	12,430
Zone J Higher Demand Forecast (Preliminary 2025 Goldbook) (MW)	10,800	10,920	11,040	11,170	11,330	11,510	11,650	11,800	11,960	12,130
Impact to Transmission Security Margin (MW)	+340	+350	+360	+360	+330	+290	+290	+300	+300	+300

Taking into account these system updates, the analysis showed that the revised system margin through 2034 would be positive and the Reliability Need identified in the 2024 RNA was eliminated. As a result, the NYISO notified stakeholders that a solicitation for solutions was not required to address the Reliability Need identified in the 2024 RNA in May 2025. Figure 9 below shows how the New York City transmission security margin deficiency identified in the 2024 RNA is addressed by the system updates.

Figure 9: New York City Margin Comparison



As described in the Background section, system updates and findings in the 2025 Q3 STAR have identified a separate, but related, Generator Deactivation Reliability Need in New York City.

Future Projects and Assumptions in the CRP

The analysis in the CRP was performed using the 2025 reliability planning model. This model is similar to that used in the 2024 RNA and has been updated with the 2025 Gold Book demand forecasts and other updates consistent with the *2025 Q3 STAR Key Study Assumptions* presented at the July 23, 2025 ESPWG meeting.⁸ This section summarizes the key future projects and assumptions that have been included as part of this CRP.

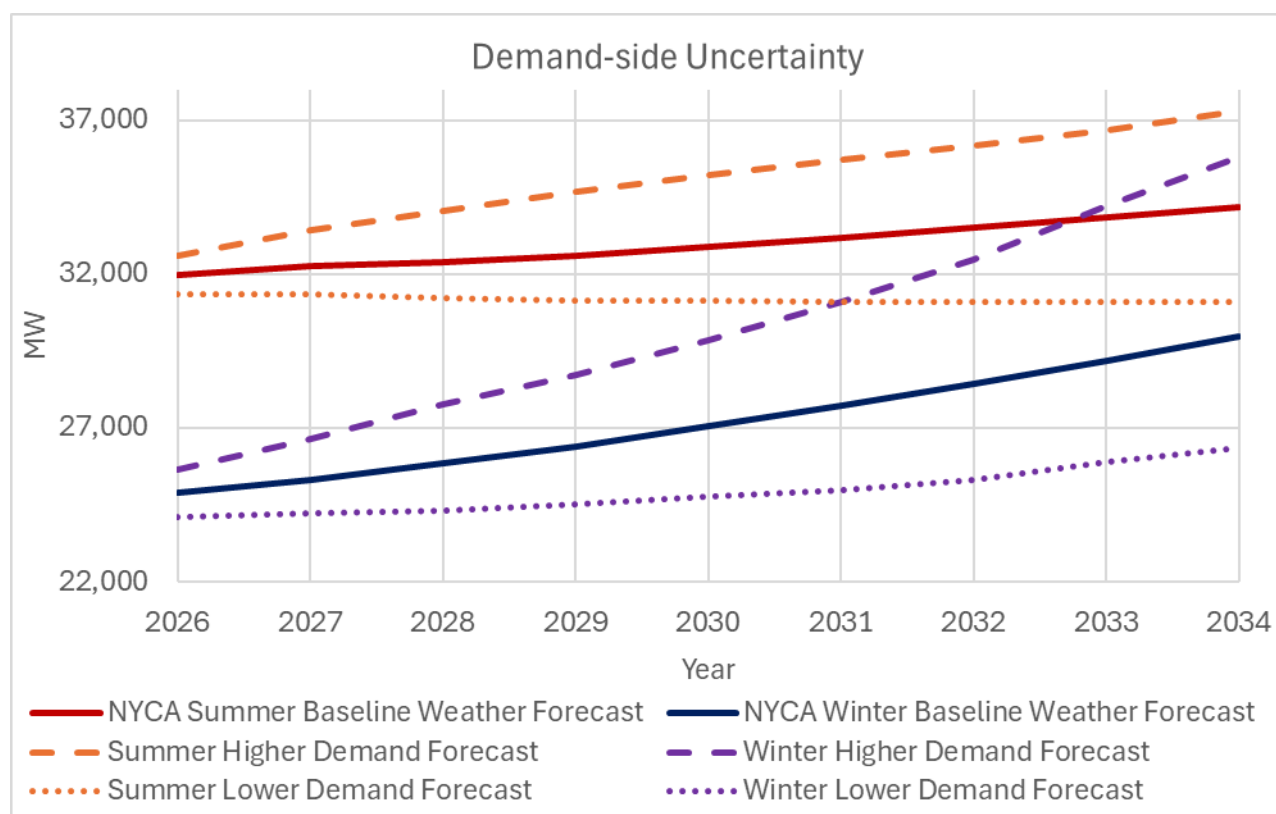
Demand Forecast

The 2025 Gold Book provides an in-depth review of the load forecast and changing resource mix. Baseline energy and coincident peak demand increases significantly throughout the 30-year forecast period in the Gold Book, driven largely by large load project growth in the early forecast years and electrification of space heating, non-weather sensitive appliances, and electric vehicle charging in the outer forecast years. As discussed further in the CRP, there is uncertainty in the demand forecast driven by

⁸ Short-Term Assessment of Reliability: 2025 Q3 Key Study Assumptions, available at https://www.nyiso.com/documents/20142/52668370/05_2025%20Q3%20STAR%20Key%20Study%20Assumptions_final.pdf.

uncertainties in key assumptions, such as population and economic growth, energy efficiency, the installation of behind-the-meter renewable energy resources, and electric vehicle adoption and charging patterns. These risks to the baseline demand forecast are seen through the incorporation of the lower and higher demand forecast, which provide a bounding to the range of forecasted conditions during the same expected weather conditions.

Figure 10 2026-2034 Demand Forecasts



Planned Generation

Figure 11 provides a graphical representation of generation capability that is included in the CRP. Figure 12 highlights the planned future generation projects and deactivations. A new generation resource is included in reliability studies when the project has reached a key milestone in the NYISO interconnection process and is making significant progress in construction, project financing, and/or regulatory approvals. The additional generation modeled in this CRP includes a total of 656 MW of land-based wind generation, 1,740 MW of offshore wind generation, 1,993 MW of solar generation, and 35 MW of battery storage planned to be in service by summer 2028. The NYISO continues to track numerous additional generation projects active in the interconnection process.

For deactivations, the CRP assumes approximately 1,615 MW of generation removed because the generator is (1) in a deactivation state, (2) operationally impacted by the DEC Peaker Rule, or (3) a NYPA small gas plant that is assumed retired at the end of 2030 based on state legislation.

Figure 11: Planned Statewide Generation Mix

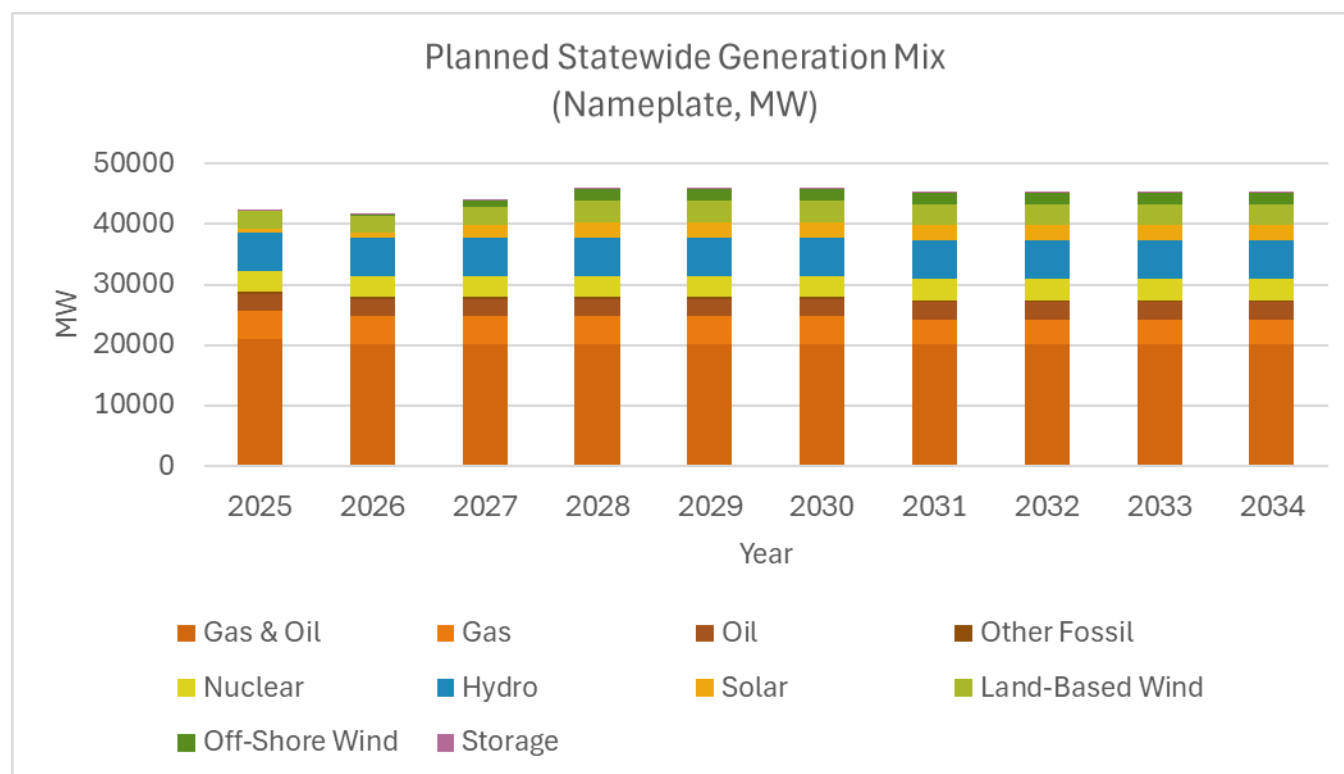
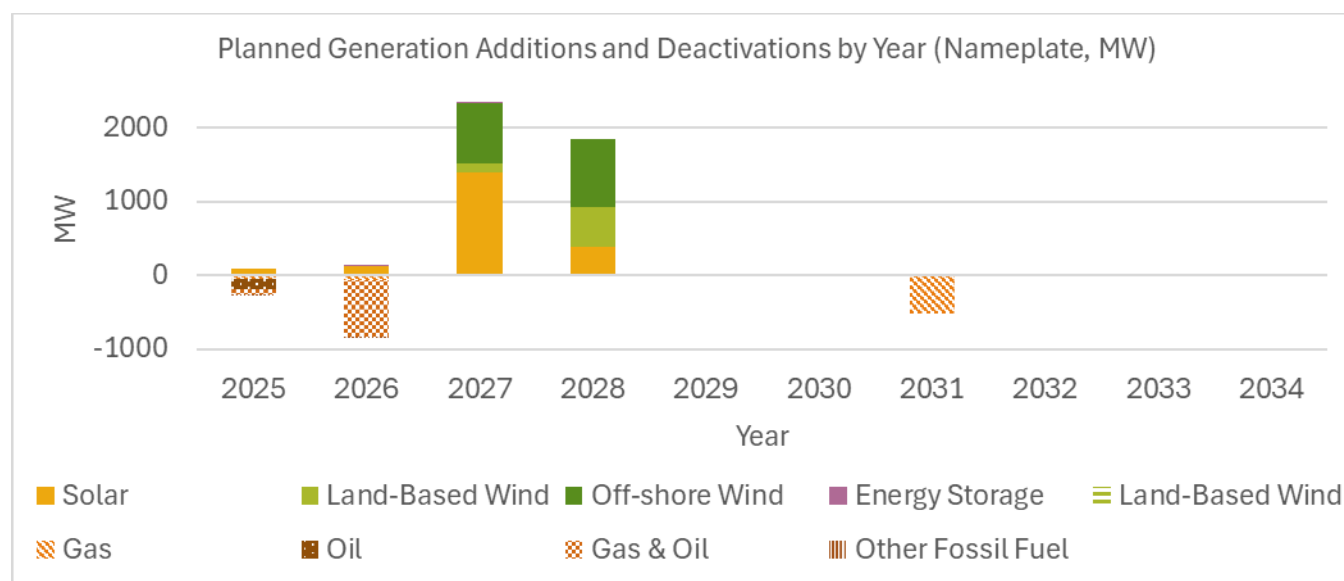


Figure 12: Planned Generation Additions and Deactivations by Year



Consistent with NYSRC reliability rules, as updated in spring of 2024, and first applied in the 2024 RNA, approximately 6,400 MW of generation with non-firm gas contracts, primarily in eastern New York, is assumed to be unavailable under expected winter weather peak demand conditions.

Planned Transmission

The major additions to the New York transmission system assumed in the CRP include the following:

- **December 2025: Smart Path Connect** NYPA/National Grid's Northern New York Priority Transmission Project proposed under the New York State Accelerated Renewable Energy Growth and Community Benefit Act December 2025
- **May 2026: Champlain Hudson Power Express (CHPE)** 1,250 MW HVDC project from Quebec to Astoria Annex 345 kV in New York City (Zone J), awarded under NYSERDA's Tier 4 REC program. The facility is expected to provide capacity in the summer but not in the winter. The planned in-service date is spring 2026.
- **May 2030: Propel NY T051 Energy Solution** proposed jointly by NYPA and New York Transco, LLC through the NYISO's Public Policy Transmission Planning Process. The project adds three new AC tie lines between Long Island and the rest of New York and a 345 kV backbone across western/central Long Island.

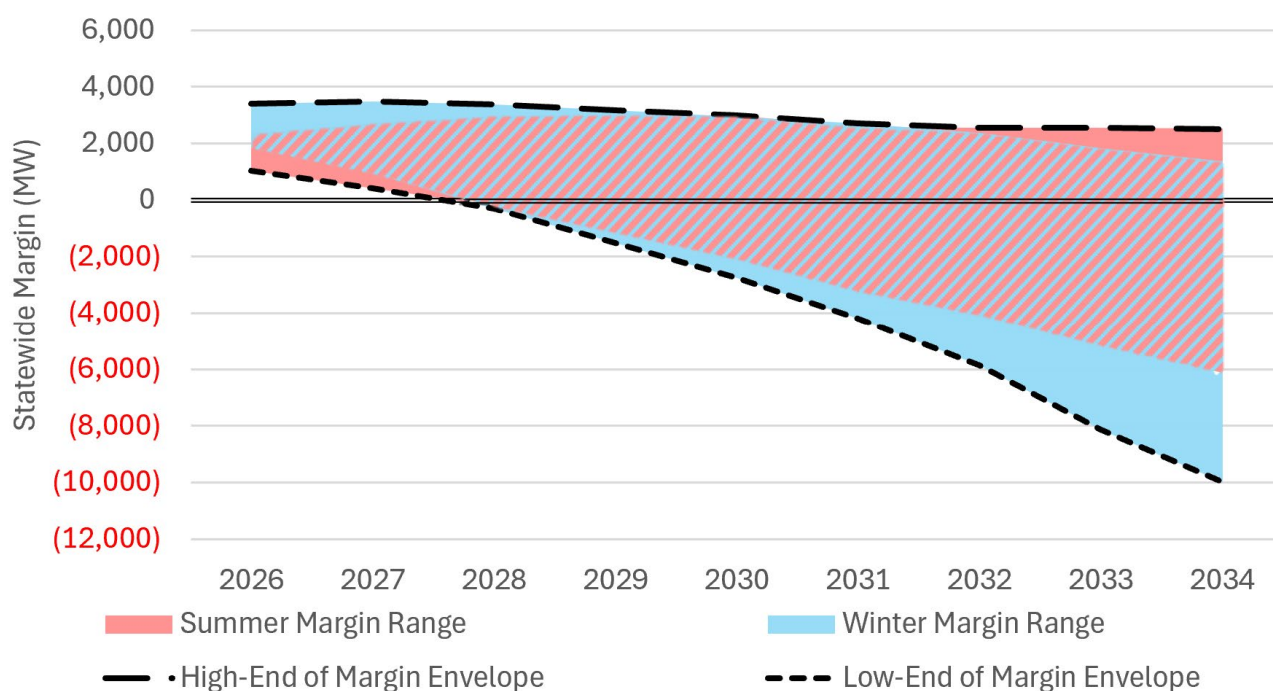
Planning for a Growing Range of Plausible Futures

Reliability planning must account for how uncertainties in key system trends may interact and compound over time; it is not enough to study each risk in isolation. The NYISO identified numerous risk factors that could adversely affect the implementation of the CRP and hence system reliability over the planning horizon. These risk factors may arise due to uncertainty in, among other things, weather and climate, economic development, or federal and state regulatory and policy adoptions. While each of these factors presents its own set of risks, their combined effects can be far more consequential. A single uncertainty may reduce reliability margins but multiple uncertainties occurring together—such as higher demand coinciding with delayed transmission projects or overreliance on aging generation—can result in critical supply shortfalls.

To better understand the range of possible futures, the CRP uses scenarios to first examine the uncertainty around each individual key system factor—i.e., aging generation, demand, weather variability, imports, project delays, demand response, and additional resources—to assess its specific influence on system performance. The CRP then further examines combinations of these uncertainties and highlights the magnitude of the impact that different plausible configurations can have on system reliability margins. These examinations—both the individual and combinations—provide insight into the level and range of system reliability.

All analyses detailed in this section use the statewide system margin as the primary metric to assess reliability impacts. The statewide system margin is a measure of the amount of generation and net imports available to supply firm load over the bulk power transmission system within applicable normal ratings and limits while maintaining 10-minute operating reserves for a certain system condition (i.e., summer peak and winter peak demand). A negative statewide system margin, on its own, is not a criteria violation, but it is a leading indicator of the system's inability to securely serve demand under normal operations. Figure 13 summarizes a plausible range of statewide system margins under various sensitivities explored at the end of this section. This range—shown as the gray backdrop in subsequent margin figures—serves as a contextual benchmark to interpret the impact of individual risk factors and scenario combinations.

Figure 13: Range of Statewide System Margins

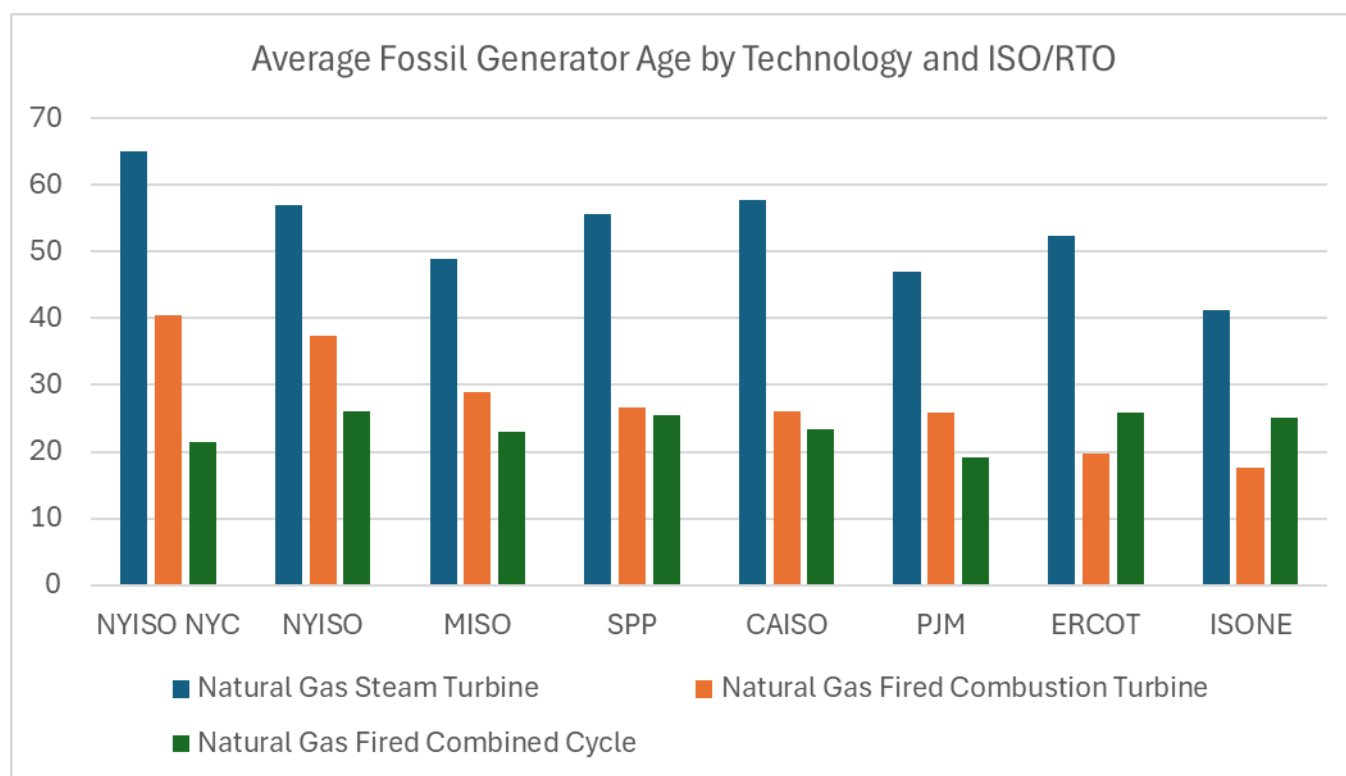


Aging Generation

New York's generation fleet is among the oldest in the country. Compared to generation in other Independent System Operator (ISO)/Regional Transmission Operator (RTO) regions in the United States,⁹ NYCA generation ranks among the oldest or second oldest in each of the natural gas steam turbine, combustion turbine, and combined cycle technology types. This is particularly apparent in New York City where the average age of a steam turbine is 65 years.

⁹ U.S. Energy Information Administration, Form EIA-860 Detailed Data, available at <https://www.eia.gov/electricity/data/eia860/>.

Figure 14: National Average Fossil Generator Age



As they age, fossil-fuel thermal generators tend to experience more frequent and longer outages. For instance, owners will have greater difficulties in maintaining and finding replacement parts for older equipment. In New York, owners are also faced with these maintenance difficulties while considering the impact of policies to restrict or eliminate emissions. These factors may drive aging generators to deactivate or be more susceptible to catastrophic failure and, in turn, may exacerbate the NYISO's trend of declining reliability margins. Reliability concerns associated with the age and condition of New York's fossil-fuel generation fleet were underscored this past winter by the units entering ICAP Ineligible Forced Outages.¹⁰

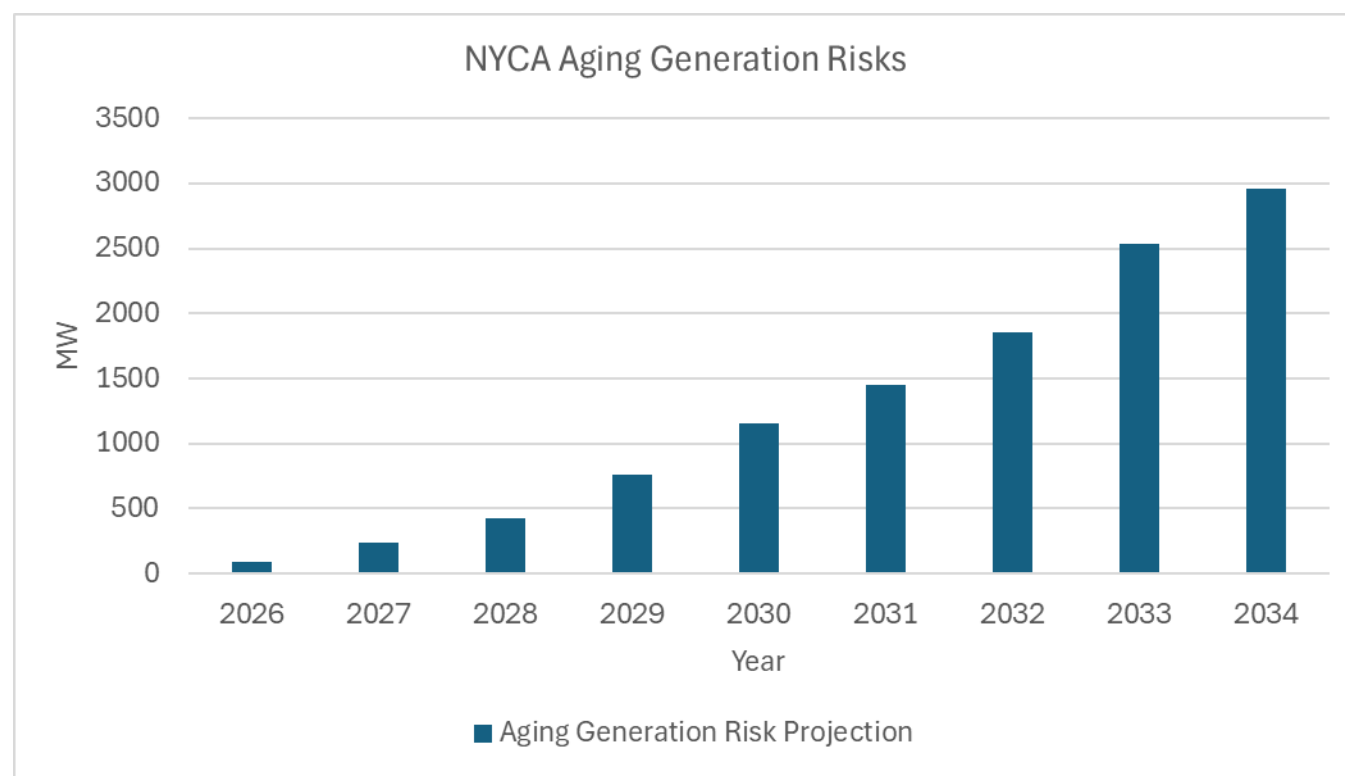
To account for the risks of the NYCA's reliance on aging generation in reliability planning studies, the NYISO developed a statistical retirement risk model. This model, described in detail in Appendix C, uses a data-driven approach to represent the risk of retirement or end-of-life failures for generating units as they advance in age. The model begins with retirement information for existing and retired generating units from the U.S. Energy Information Administration's EIA-860 data form.¹¹ Observed retirement behavior is transformed into survival (or retirement) curves for different generator types—e.g., natural gas steam turbines, combined cycle, etc. At the point in which a NYCA generator reaches the age at which 95% of peer

¹⁰ Generator Status Updates, <https://www.nyiso.com/ny-power-system-information-outlook>.

¹¹ See generally, U.S. Energy Information Administration, Form EIA-860 Detailed Data, available at <https://www.eia.gov/electricity/data/eia860/>.

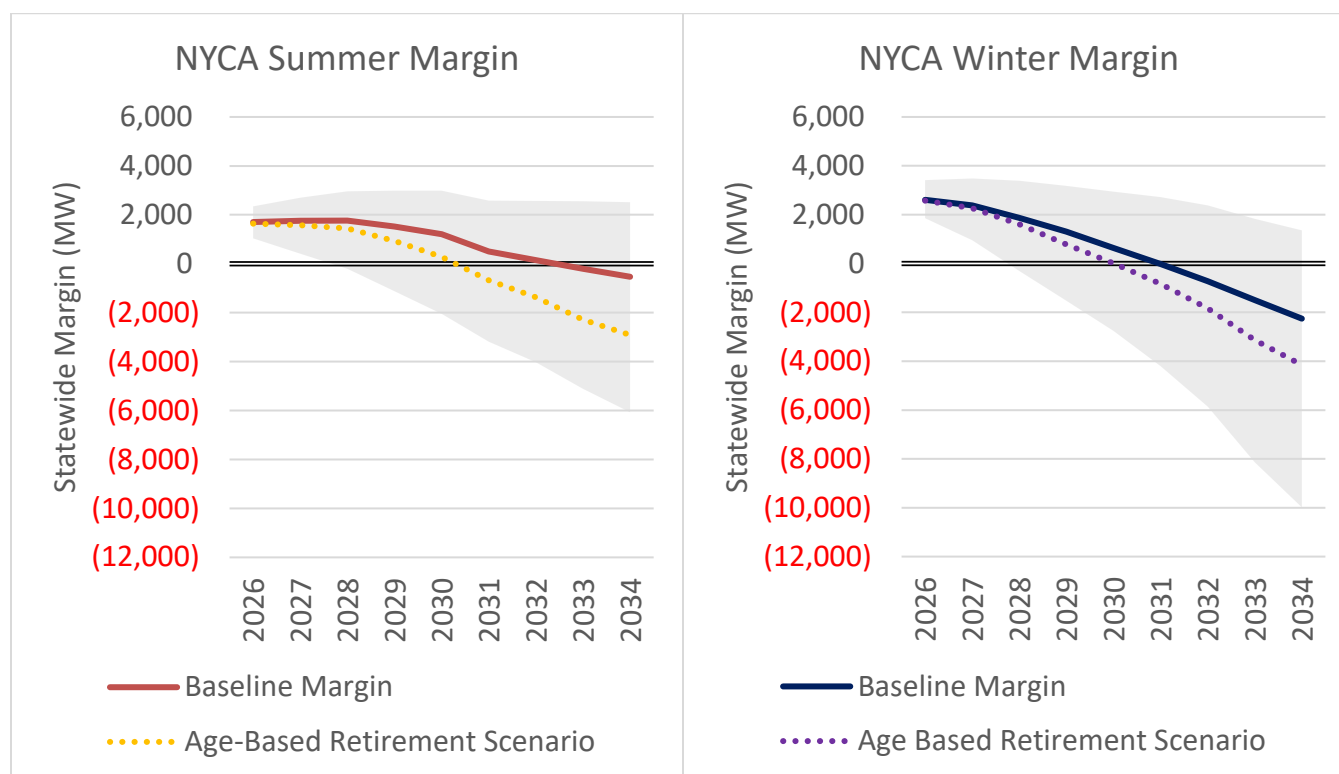
units would have retired, a derate is applied to account for that generator’s increasing retirement or failure risk with age. This derate is applied only to fossil-fuel thermal generators as nuclear, hydro, and renewables have failure and retirement risks that are not as correlated to age. This model does not have a separate component to explicitly model the potential for increased forced outage rates as a generator approaches end of life. Forced outage rates of aging generation could also be compounded if these units experience increased run cycles and extreme weather operations as they are relied on more in the future due to decreasing reliability margins. Figure 15 shows how the risk, calculated in unavailable MW, grows in time as the fleet ages during the course of the planning horizon. This projection of aging generation is applied in various analyses throughout the rest of the CRP. Going forward, the NYISO will hold thorough stakeholder discussions prior to adopting this model or other aging generation assumptions in future reliability planning studies.

Figure 15: Aging Generation Risk Projection



Reliance on the aging fossil-fuel generation fleet presents a growing risk to maintaining reliability of the New York grid. The following results quantify the impact of the retirement or failure of aging fossil-fuel generators on statewide system margins.

Figure 16: Statewide System Margin Impact of Aging Generation



Demand-Side Uncertainty

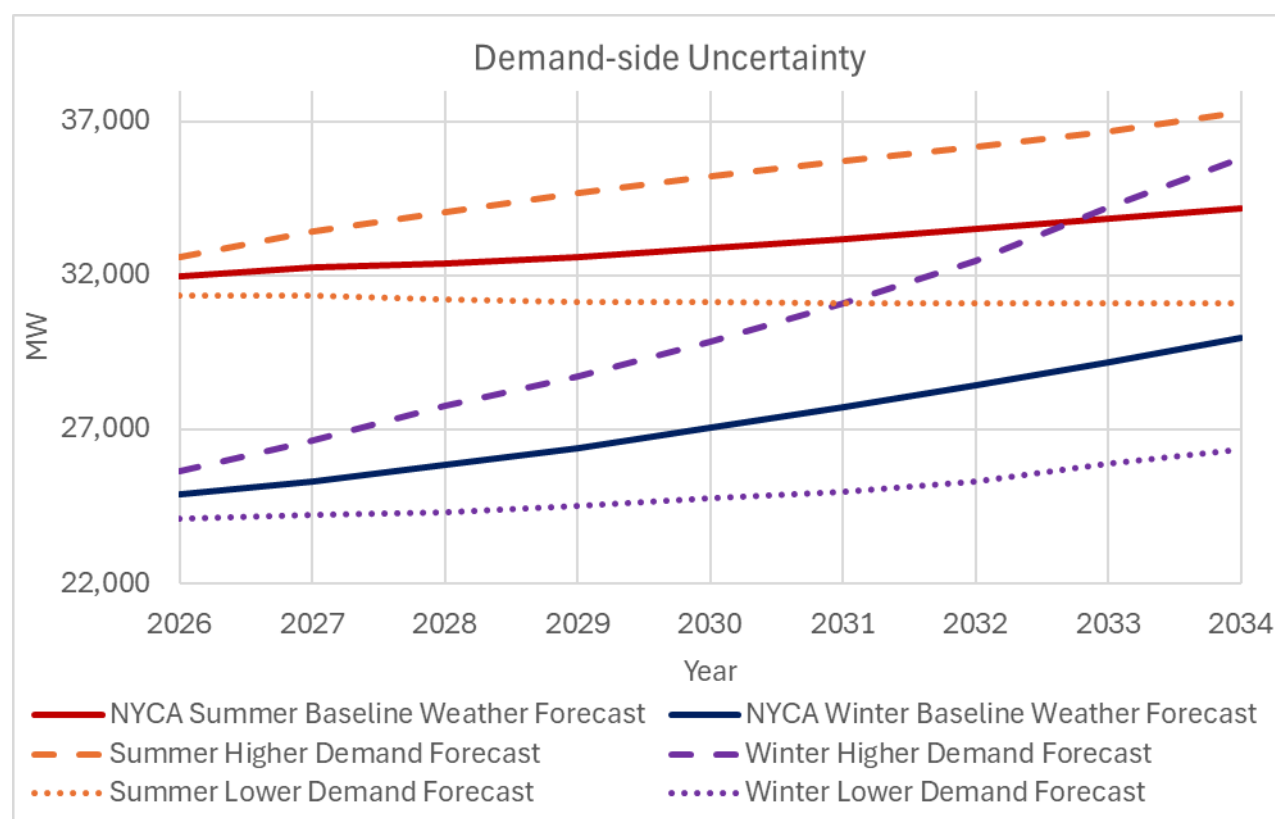
The 2025 Gold Book includes three demand forecasts: Lower Demand, Baseline, and Higher Demand. Each of these forecasts contains differing inputs on economic, electrification, and large load assumptions, but the weather conditions are the same across each of these forecasts. The behind-the-meter (BTM) solar, BTM distributed generation, and energy storage forecasts are consistent across all scenarios. Further details of the Higher Demand and Lower Demand forecasts are summarized as follows:

- **Higher Demand** – The Higher Demand forecast is developed to broadly reflect levels of heating electrification and EV adoption commensurate with the achievement of New York’s policy targets. However, the Higher Demand forecast does not include the full potential of peak-mitigating factors, such as managed EV charging and other flexible load and efficiency measures. The Higher Demand forecast assumes additional large load growth beyond that included in the baseline forecast. The Higher Demand econometric and EV and building electrification forecasts assume an increasing population and number of households over the duration of the forecast horizon, and stronger than expected economic growth.
- **Lower Demand** – The Lower Demand forecast assumes a slower EV adoption rate with a greater share of managed charging and a lower saturation of electric heating than the baseline forecast. Lower Demand forecast assumes reduced large load growth and weaker than expected economic growth relative to the baseline forecast.

The result of the differences in the forecasts is that the Higher Demand and Lower Demand forecasts

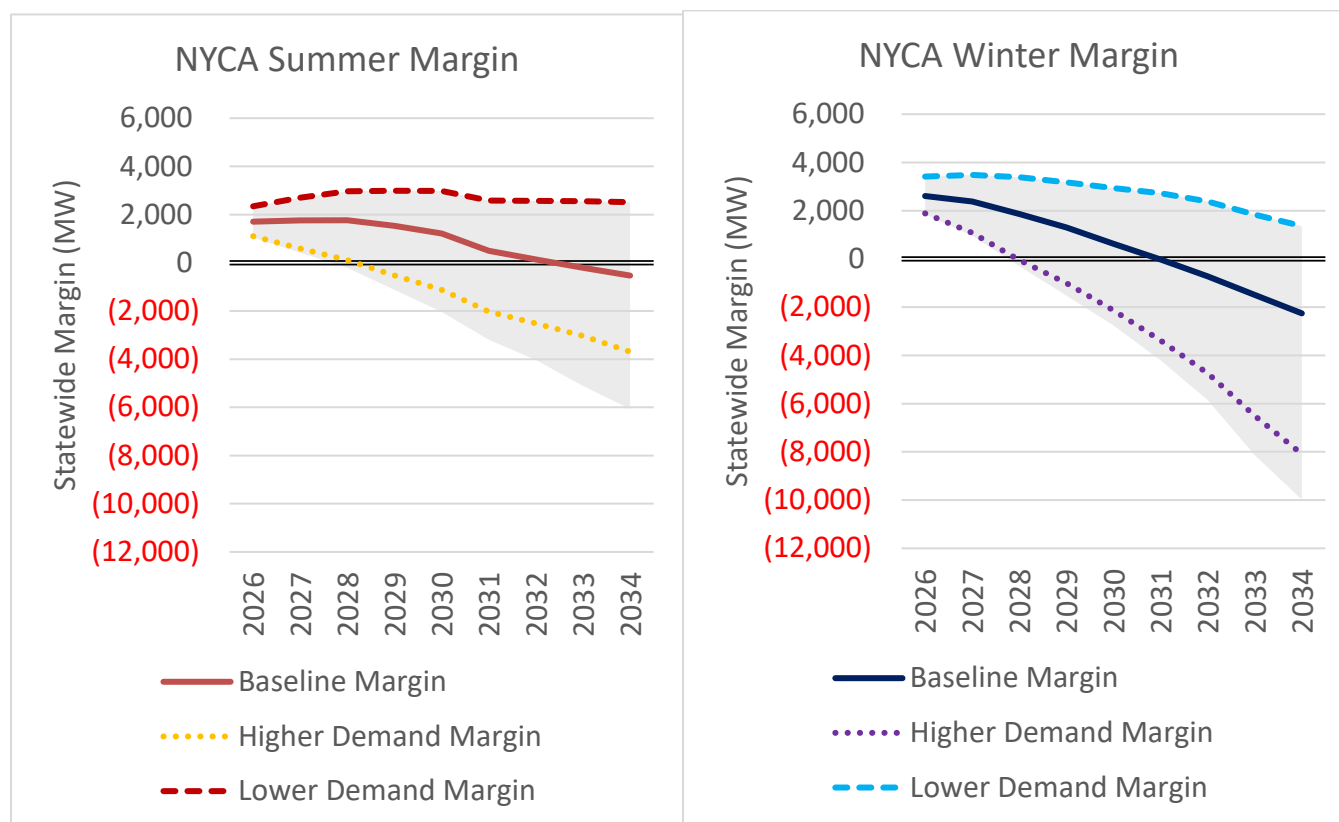
produce lower and upper bounds around the Baseline forecast. Figure 17 provides a visual depiction of the three forecasts.

Figure 17: Demand-Side Uncertainty



Uncertainty in demand forecasts driven by electrification, economic trends, and large load growth can significantly affect statewide system margins. Figure 18 shows the impact of the baseline assumptions using each of the Lower Demand, Baseline, and Higher Demand forecasts from the 2025 Gold Book.

Figure 18: Statewide System Margin Impact of Demand-Side Uncertainty



Large Loads

The recent increase of interconnection requests for large load projects poses a risk to reliability as the magnitude and speed of these requests are far exceeding that of additional resources that would be needed to serve them. Given the NYISO's approach in developing the demand forecasts and how that aligns with the progress of the large load interconnection requests, the forecasts do not account for all of the large load projects seeking to interconnect to the system. As of the September 30, 2025 NYISO Interconnection Queue,¹² there are over 8,000 MW of additional requested large load interconnection projects in the NYISO interconnection queue compared to the load projects included in the Baseline forecast for the 2024 RNA. Figure 19, below, summarizes the load interconnection projects that are in service and have pending interconnection requests in the NYISO's queue compared to the large load interconnection projects included in the Baseline demand forecast.

¹² NYISO Interconnection Queue (dated September 30, 2025) and posted to the NYISO website on October 10, 2025, available at <https://www.nyiso.com/interconnections>.

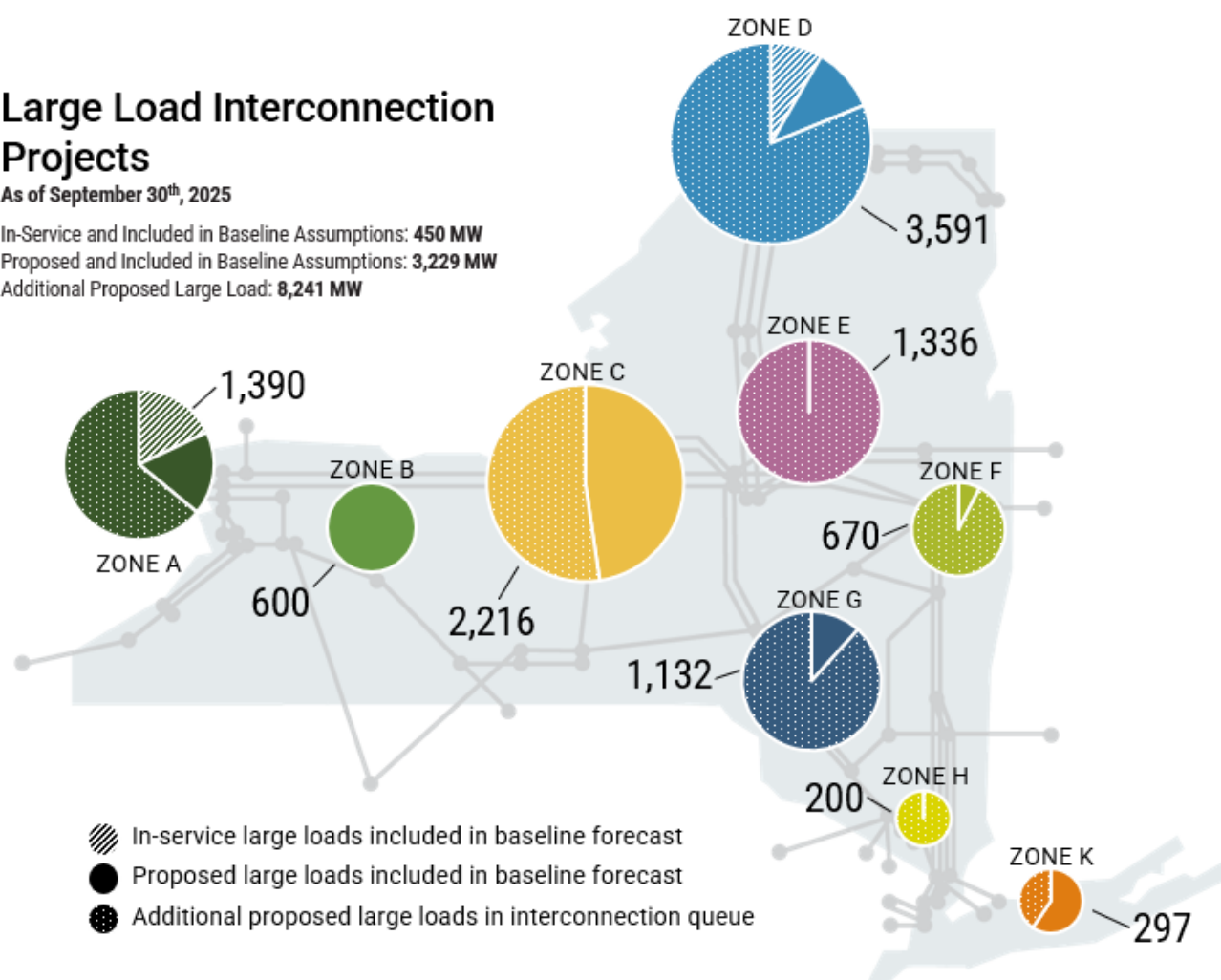
Consistent with the 2024 RNA, the NYISO assumed in the baseline analyses that cryptocurrency mining and hydrogen production large loads will be flexible during both summer and winter system peak demand conditions. It is worth noting that the vast majority of large load interconnection requests are for semiconductor manufacturing plants and non-cryptocurrency data centers and the developers of these types of load projects indicate that their operations are not flexible.

Figure 19: Large Load Interconnection Projects

Large Load Interconnection Projects

As of September 30th, 2025

In-Service and Included in Baseline Assumptions: **450 MW**
Proposed and Included in Baseline Assumptions: **3,229 MW**
Additional Proposed Large Load: **8,241 MW**



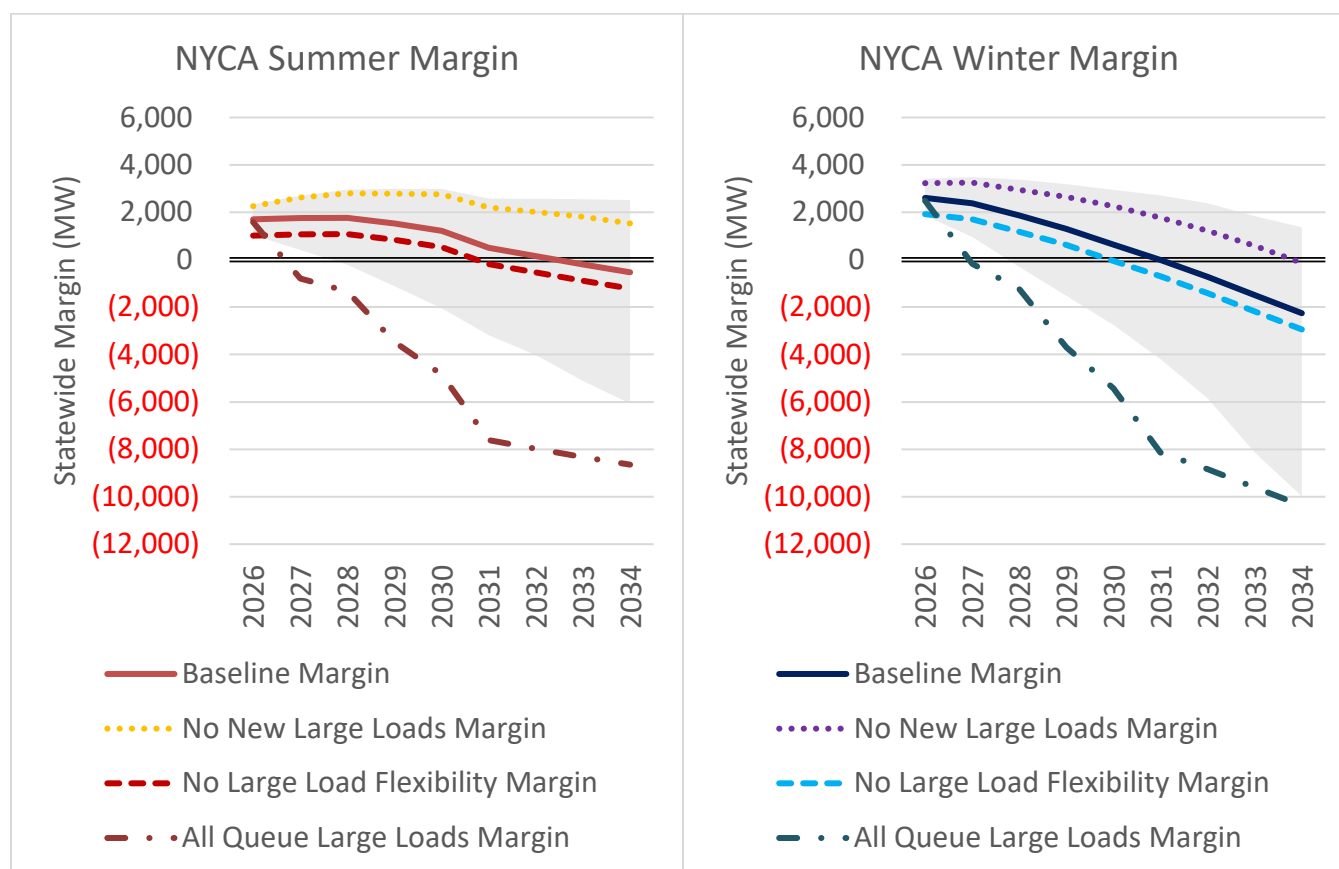
Similar to interconnection requests for resources, not all of the load interconnection projects will timely move forward. This CRP, therefore, examines different assumptions for the large load interconnection requests to better understand the uncertainty to the reliability of the system.

- **No New Large Load In Service** – Assumes that no large loads go into service over the planning horizon, including the future load projects accounted for in the Baseline forecast. Alternatively, this scenario could inform a future where all new large loads are flexible at summer and winter peak conditions.

- **No Large Load Flexibility** – Assumes that all large loads, regardless of their end-use, are inflexible and would draw power from the grid under all system conditions.
- **All Proposed Large Load In Service** – Assumes that all proposed large load interconnection requests as of September 5, 2025 are in service and operating at their full requested loads.

The rapid increase in large load interconnection requests introduces substantial uncertainty and reliability risks. Figure 20 details how different assumptions about load flexibility and project realization affect statewide system margins.

Figure 20: Statewide System Margin Impact of Large Load Interconnection Projects



Weather Variability

Weather is a separate variable in forecasting demand from the policy and economic development considerations mentioned in the previous sections. The design condition of the baseline peak forecasts, as published each year in the NYISO Gold Book, are designed by the Transmission Owners at 67th percentile weather conditions for the Con Edison and Orange and Rockland service territories, and at the 50th percentile in the remaining transmission districts. The baseline forecasts are representative of expected

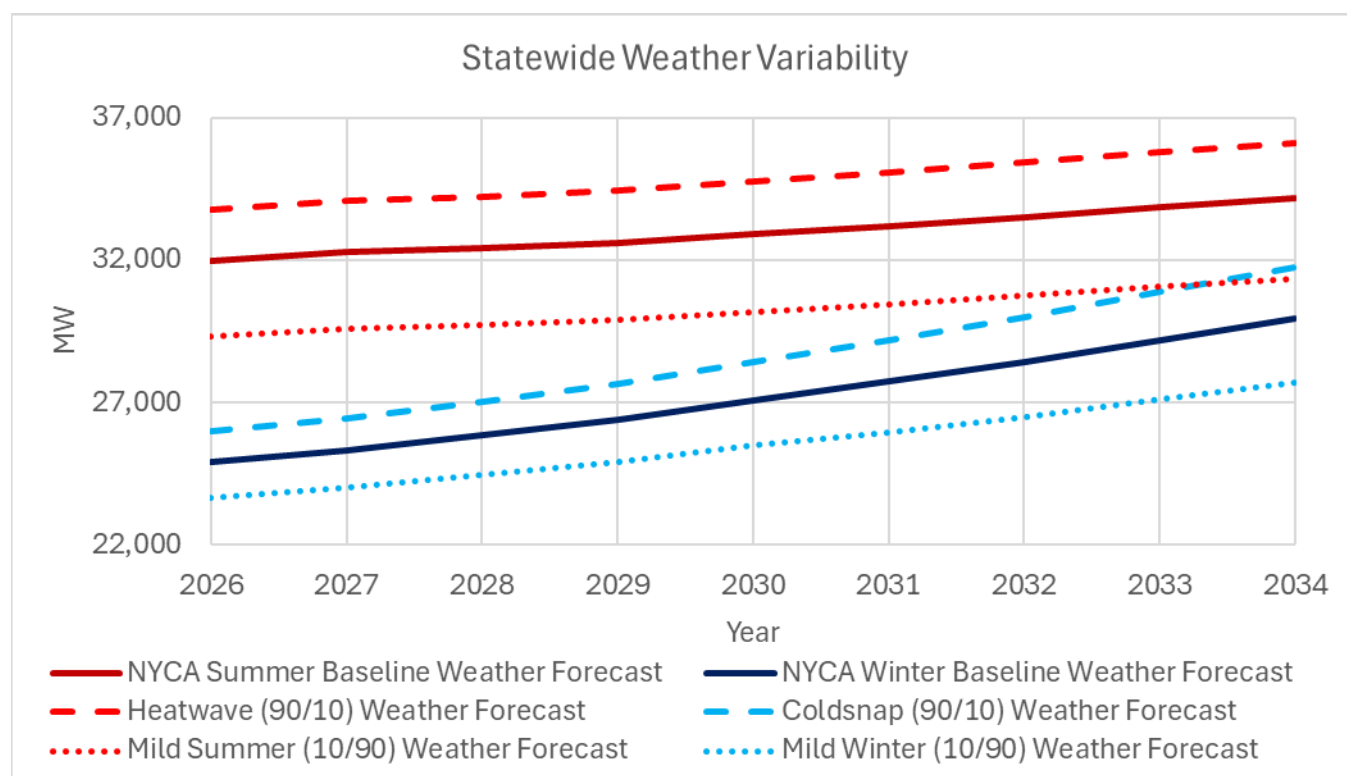
weather for a given period. The current demand forecasts indicate that baseline summer peak day daily maximum temperature is 92 degrees, and the baseline winter daily minimum temperature is 8 degrees.

- **Heatwave (90/10)** - The 90th percentile summer peak forecast represents a warmer than expected summer peak day with the daily maximum temperature being 95 degrees.
- **Coldsnap (90/10)** - The 90th percentile winter peak forecast represents a colder than expected winter peak day with the daily minimum temperature being 0 degrees.
- **Mild Summer (10/90)** - The 10th percentile summer peak forecast represents a milder than expected seasonal peak day, with cooler weather during the summer peak and a daily maximum temperature of 87 degrees.
- **Mild Winter (10/90)** - The 10th percentile winter peak forecast represents a milder than expected seasonal peak day, with warmer weather during the winter peak and a daily maximum temperature of 19 degrees.

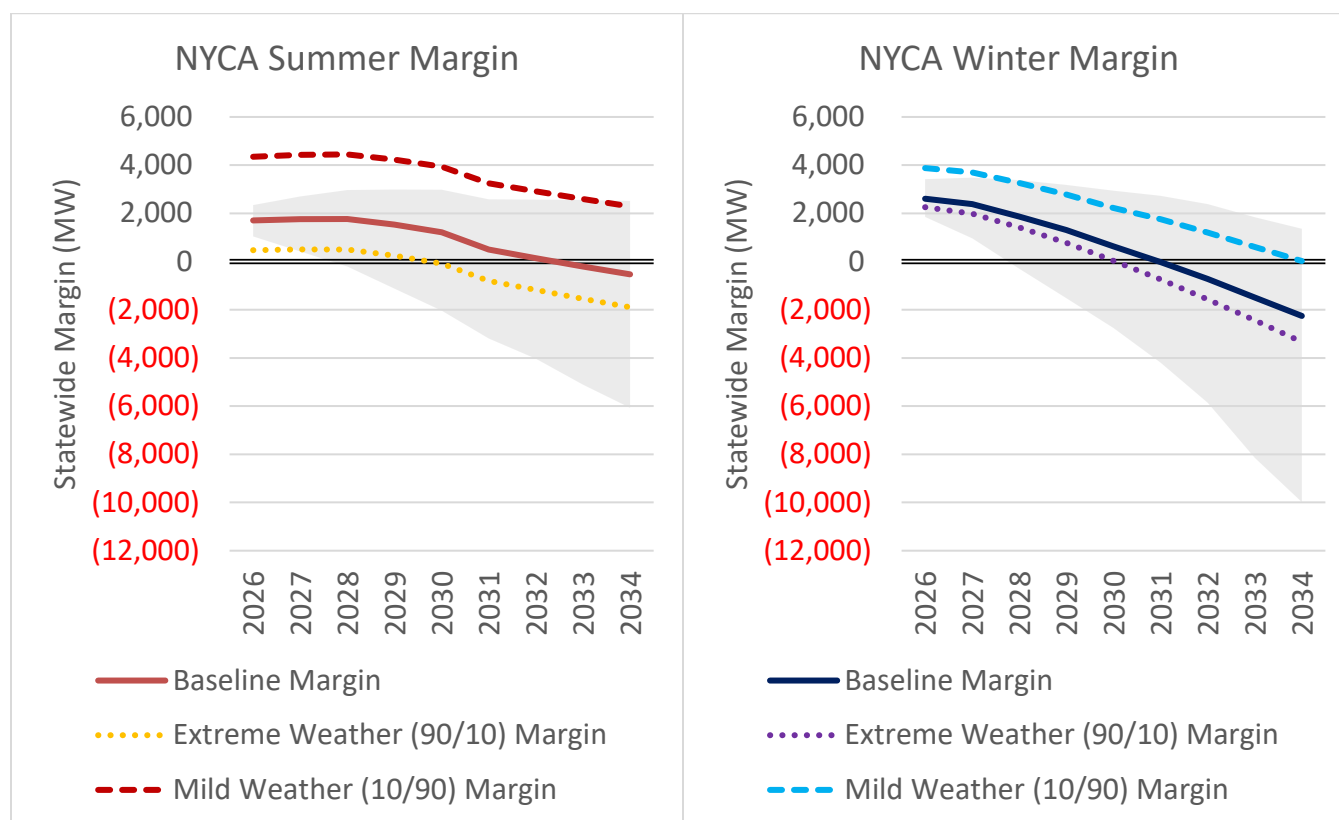
The design condition serves as a balanced benchmark used in planning studies. However, the NYISO still needs to operate the system reliably throughout the various weather variations and, therefore, the actual peaks will vary from the baseline peak forecast. As a reference point, the actual peak during the cold snap that occurred between January 18 and January 23, 2025 was approximately 99th percentile (99/1) of the winter 2024/2025 baseline forecast, and the mid-June 2025 heat wave that occurred between June 23 and June 25 approached the summer 90th percentile (90/10) forecast.

Figure 21, below, summarizes the variability of the forecasts based on the variability of the weather compared to the summer and winter baseline expected weather forecast for the NYCA.

Figure 21: Weather Variability



Weather extremes can cause significant deviations in the results when compared to the baseline forecasts. Figure 22 shows the impact of heatwaves, cold snaps, and milder-than-expected weather on the statewide system margins.

Figure 22: Statewide System Margin Impact of Weather Variability


Reliance on Imports

The baseline statewide system margin calculation assumes that all firm scheduled imports from neighboring systems, as coordinated during the Eastern Interconnection Reliability Assessment Group's annual processes, are available. Figure 23 summarizes the assumed interface flows used for the transmission security analysis. In summer peak conditions, the NYISO is expected to receive a net total of 3,094 MW from neighboring systems—of which 734 MW is assumed to be delivered to NYCA during winter peak conditions. However, the operational reality is that during peak conditions when the New York system is stressed, neighboring systems may not be able to deliver power to New York due to their own system needs.

Figure 23: Imports from Neighbors

Statewide Reliance on Imports							
From Area to NYCA	New England	HQ (CHPE)	HQ (Other)	PJM (Neptune)	PJM (Other)	Ontario	Total
Summer Imports	-83	1,250	1,100	660	157	0	3,084
Winter Imports	-83	0	0	660	157	0	734

To consider uncertainty from neighboring systems being unable to deliver power to New York, this CRP assessed different scenarios of import limitation:

- The unavailability of imports Hydro Quebec over CHPE
- The unavailability of imports from PJM over Neptune
- The unavailability imports from PJM over Linden VFT
- The unavailability of all firm imports into the NYCA

Assumed firm imports may not be available during peak conditions. Figure 24 summarizes the impacts of reduced import availability on the statewide system margins. Figures 25 and 26 summarize the impacts of reduced imports to specific zones within the NYCA that are particularly affected by imports over key tie lines—CHPE, Linden VFT, and Neptune.

Figure 24: Statewide System Margin Impact of Imports

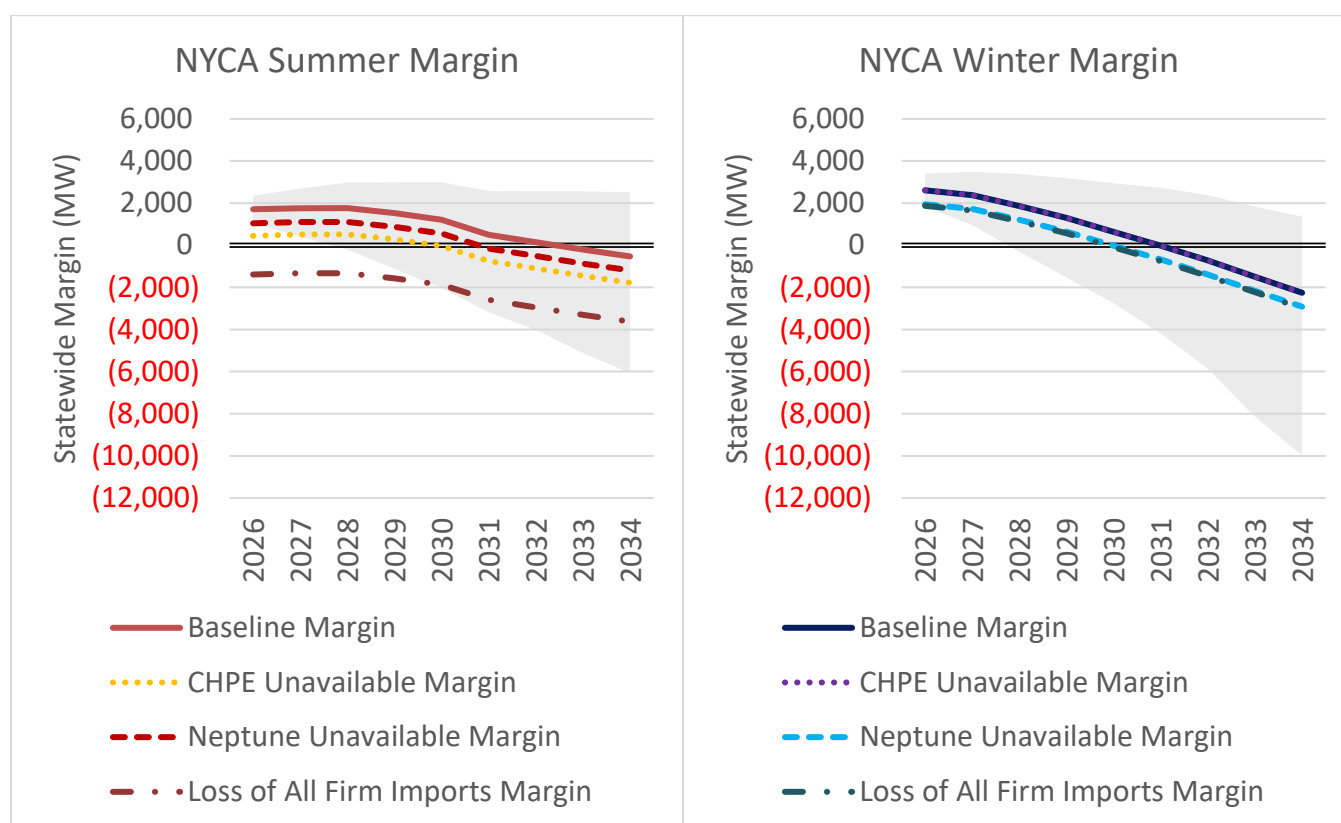


Figure 25: Zone J Transmission Security Margin with Impact of Imports

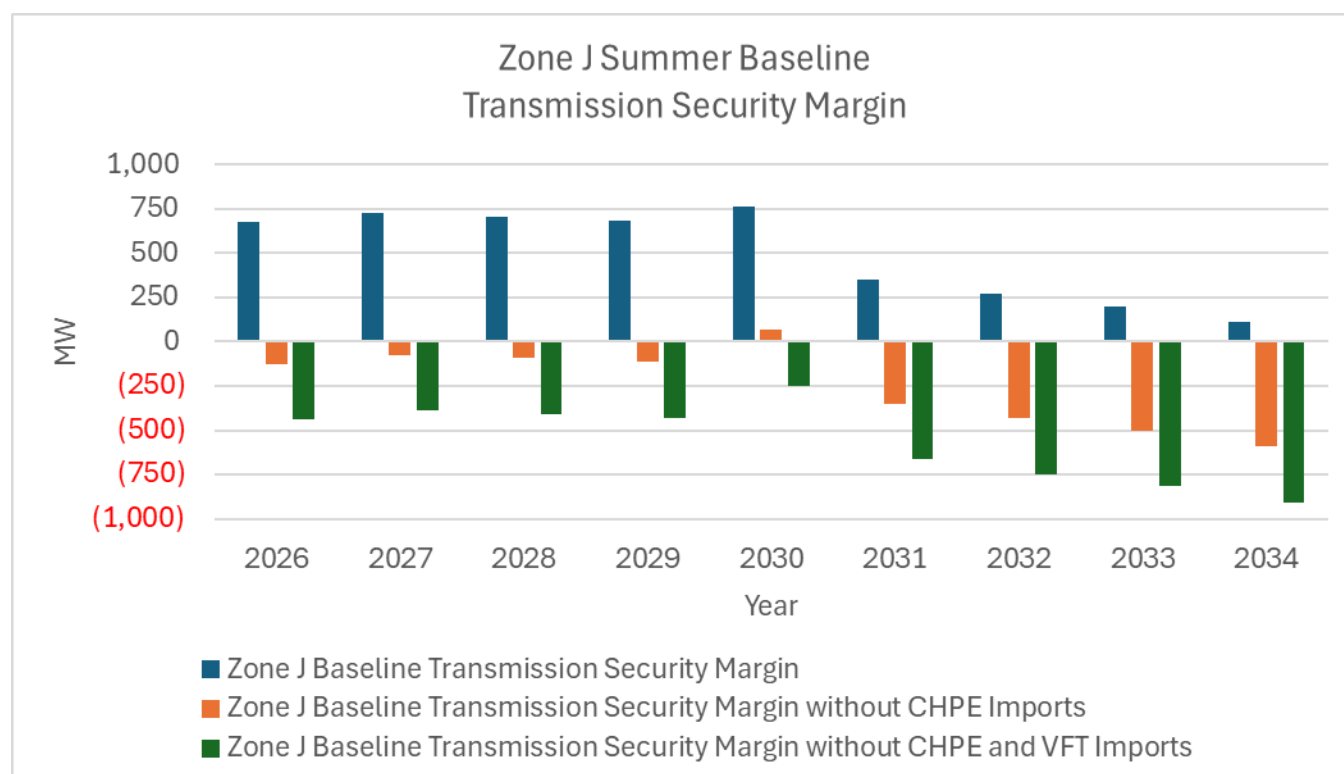
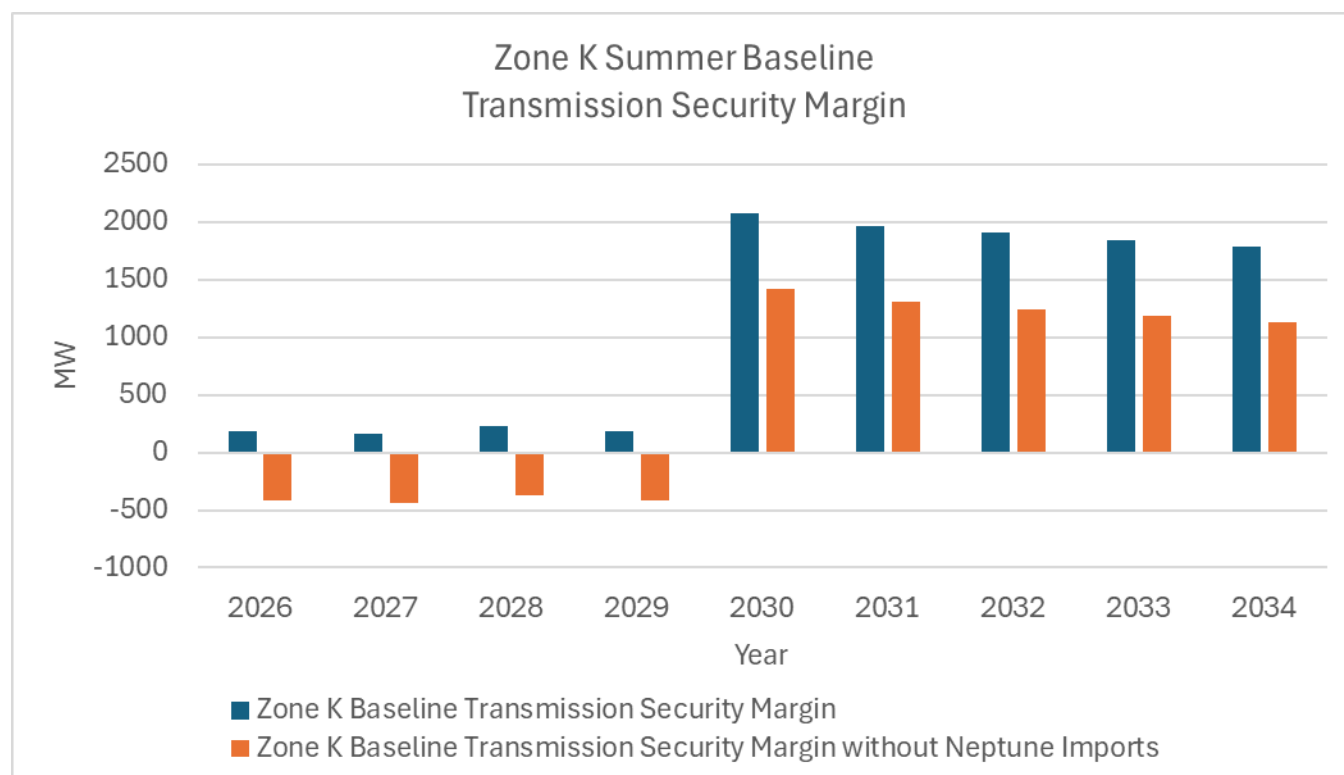


Figure 26: Zone K Transmission Security Margin with Impact of Imports



Nuclear Relicensing

Four nuclear generators in upstate New York account for 9% of total statewide installed capacity with a combined nameplate capability of over 3,500 MW, but provide 21% of the energy produced in the state in 2024. These units are described in Figure 27 below, which includes their nameplate MW capability, age, and operational license expiration date. Existing nuclear energy, in addition to being emissions-free, provides reliable, continuous, predictable supply. The upstate nuclear generators are currently supported by the Zero Emissions Credit program under the Clean Energy Standard by the Public Service Commission through March 2029. The PSC is currently considering an extension of the ZEC program through 2049.¹³

The licenses of three of the four nuclear units in New York are scheduled to expire before 2035. Additionally, Nine Mile Point 1 and Ginna are the two oldest operational nuclear units in the country. Nuclear reactors are required to be licensed by the Nuclear Regulatory Commission for an initial 40-year period; licenses can be renewed after reviews and inspections for safety and environmental issues for two additional 20-year periods thereafter for a total of 80-years of operation. All four nuclear generators in New York would be applying for subsequent license renewals to allow operations beyond 60 years.

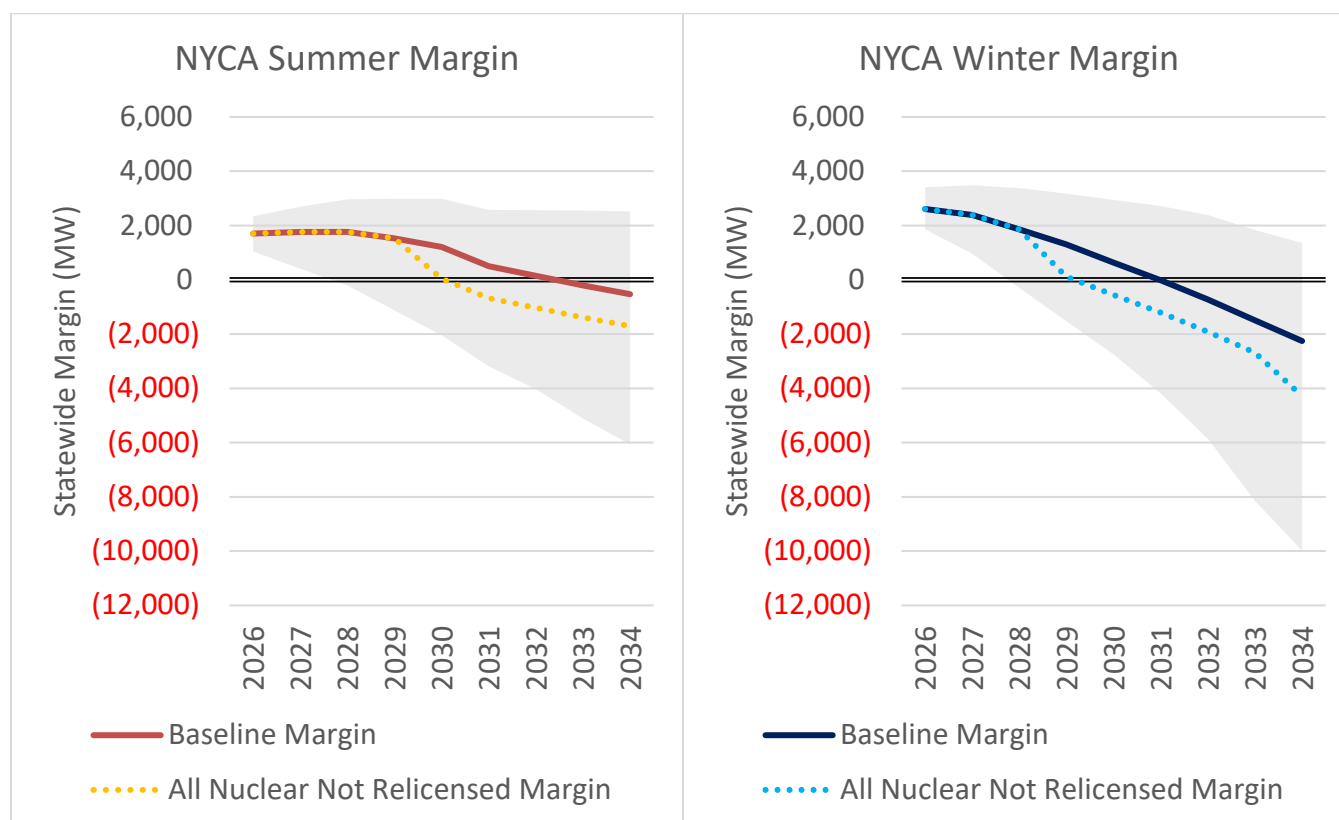
Figure 27: NYCA Nuclear Units

NYCA Nuclear Units				
Unit Name	Zone	Nameplate MW	Unit Age (years)	License Expiration Date
R.E. Ginna	B	614	55	9/18/2029
J.A. Fitzpatrick	C	882	50	10/17/2034
Nine Mile Point 1	C	642	56	8/22/2029
Nine Mile Point 2	C	1,399	37	10/31/2046

Figure 28 summarizes the impact of the risk of the nuclear units not being relicensed after their current operational license expires. Margin deficiencies are observed within one year of the loss of these resources. These results are based on removing each unit following the expiration of its current operating license. The deficiencies would be greater and occur earlier if all four nuclear units are removed following the March 31, 2029 expiration of the current ZEC program.

¹³ <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={20FE6198-0000-CF2B-A36D-8B6869CF6E5E}>.

Figure 28: Statewide System Margin Impact of Nuclear Units Not Relicensed



Demand Response

Demand response includes Special Case Resources (SCRs) for which the load is capable of being interrupted at the direction of the NYISO or have a local generator that can be operated to reduce load from the New York State Transmission System or the distribution system at the direction of the NYISO. In the NYISO's reliability planning studies, SCRs are not applied for transmission security analysis of normal operations but are included for emergency operations.

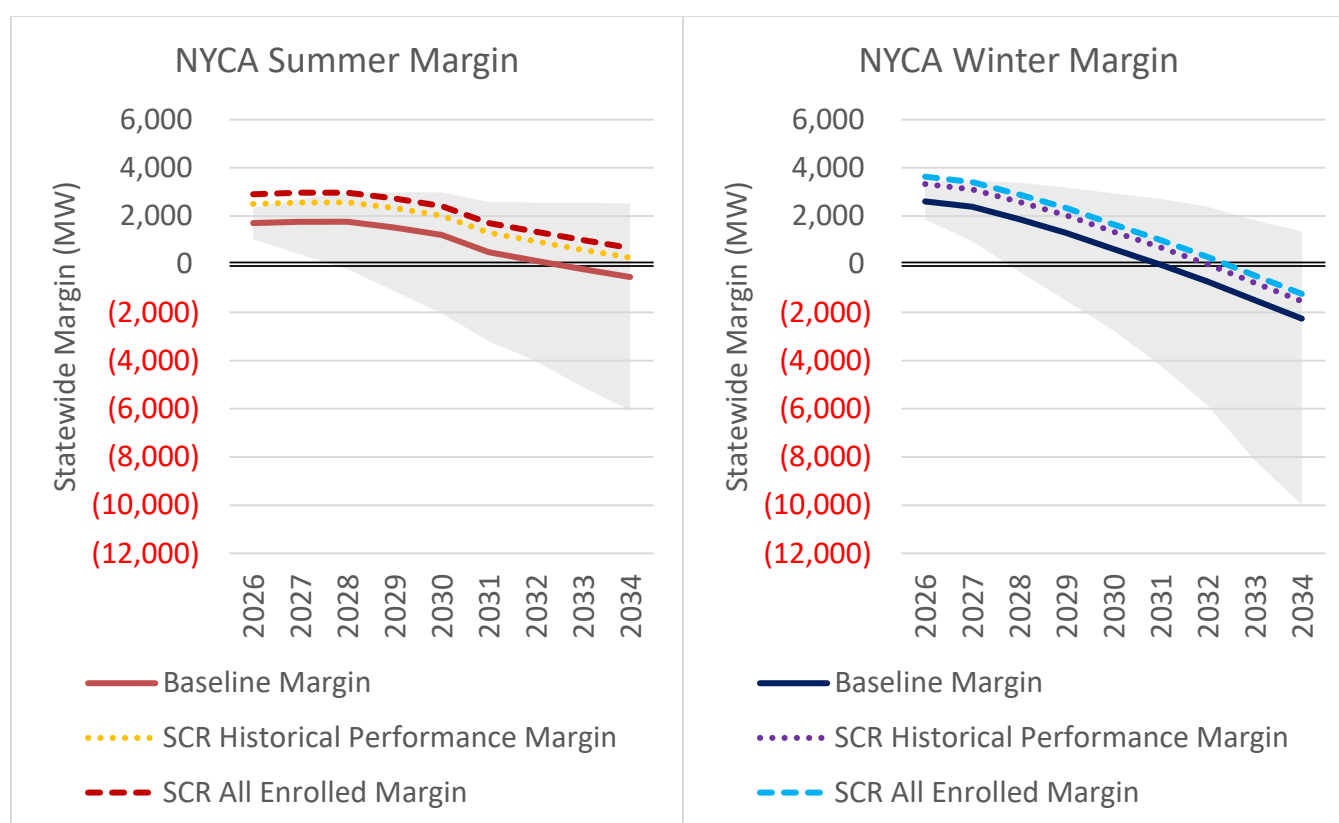
Figure 29 shows the SCR enrollment and derated values based on historic performance that assumed in the CRP.

Figure 29: Special Case Resources

Special Case Resources	
Summer Elections	
SCR Enrollments	1,205
SCR with performance based derate	804
Winter Elections	
SCR Enrollments	1,026
SCR with performance based derate	721

The NYISO does not typically include demand response resources in normal operations planning. Figure 30 shows how applying SCRs could improve statewide system margins.

Figure 30: Statewide System Margin Impact of Special Case Resources



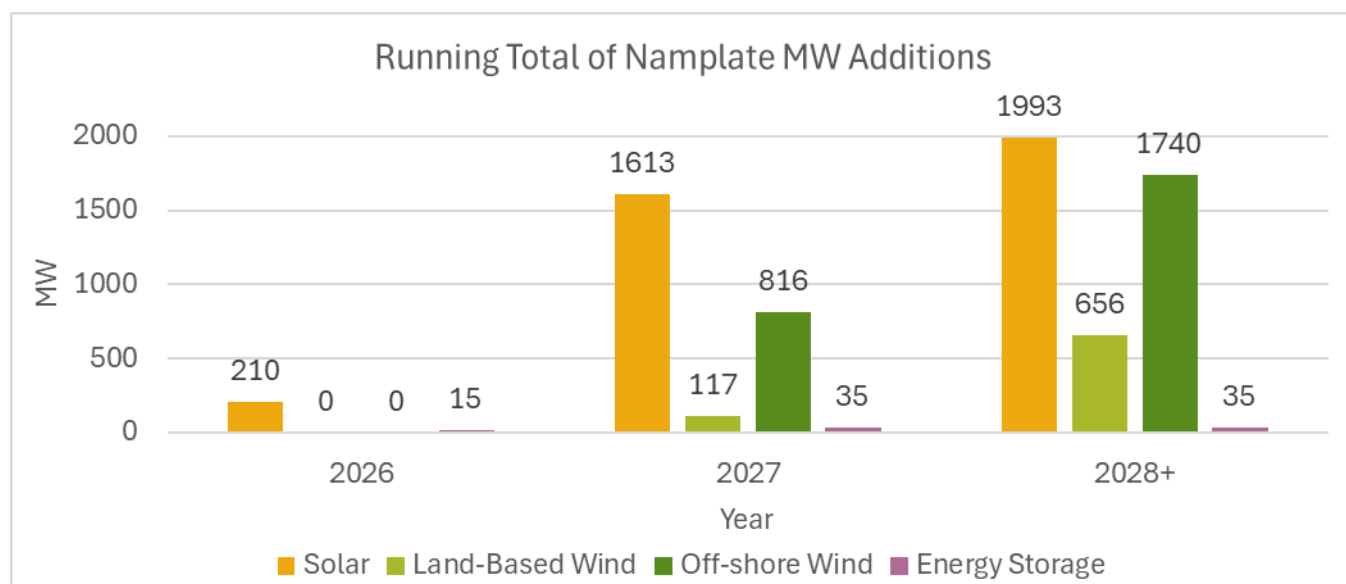
Potential Transmission and Generation Project Delays

Recently, supply chain issues have led to long lead times for the delivery of equipment needed to construct energy infrastructure. Additionally, delays in acquiring the permits that are required to build projects add additional risk for planned projects to meet their proposed in-service dates. This includes the potential for delay of key transmission projects like CHPE and Propel NY Alternate Solution 5, which are expected to have, among other things, a positive impact on overall system reliability. Transmission Owner

LTPs and additional resources planned through the NYISO interconnection process may also be postponed.

Currently, the CRP assumes over 4,400 MW of planned additional resources will be in service by the end of 2028. Recent actions taken by the federal government have drastically impacted the prospects for the development and construction of offshore wind and other renewable resources. The delay or cancellation of these resources coming into service will have adverse effects on system reliability. The total of nameplate additions assumed by fuel type are summarized in Figure 31.

Figure 31: Resource Additions



- **CHPE Unavailable** – Assumes the unavailability or delay of CHPE entering service past summer 2026. The CHPE connection from Quebec, Canada to New York City is currently scheduled to enter service in spring 2026 and is assumed to provide 1,250 MW to New York City in summer but 0 MW in winter.
- **Propel NY Alternate Solution 5 Project Delay** – Assumes the delay of the Propel NY Alternate Solution 5 project, which in-service date is currently identified as May 2030. The transmission infrastructure from this project will increase the import capability into Long Island from upstate by about 1,300 MW.
- **Status Quo** – Assumes that transmission and generation projects that are currently planned for in the Reliability Planning base cases but not currently in service (approximately 4,400 MW of generation projects, as described above) do not enter service during the planning horizon, while maintaining the assumption that demand grows as forecasted, including large load development.

Delays in planned transmission or generation projects pose a risk to reliability. Figure 32 shows the statewide impact of Status Quo and CHPE Unavailable scenarios, while Figure 33 and Figure 34 show the significant impact of CHPE and Propel NY to the New York City and Long Island transmission security

margins, respectively.

Figure 32: Statewide System Margin Impact of Project Delays

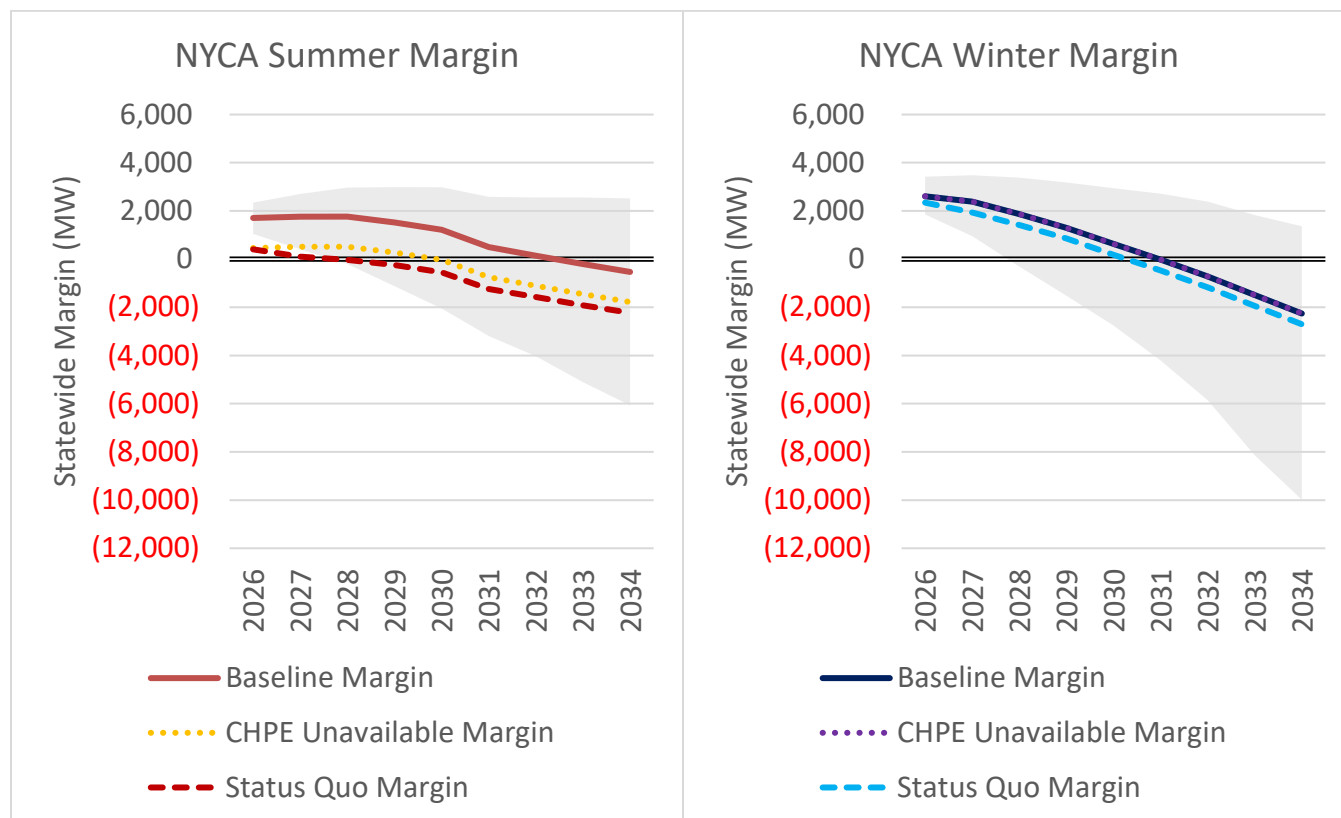


Figure 33: Zone J Transmission Security Margin with Impact of Project Delays

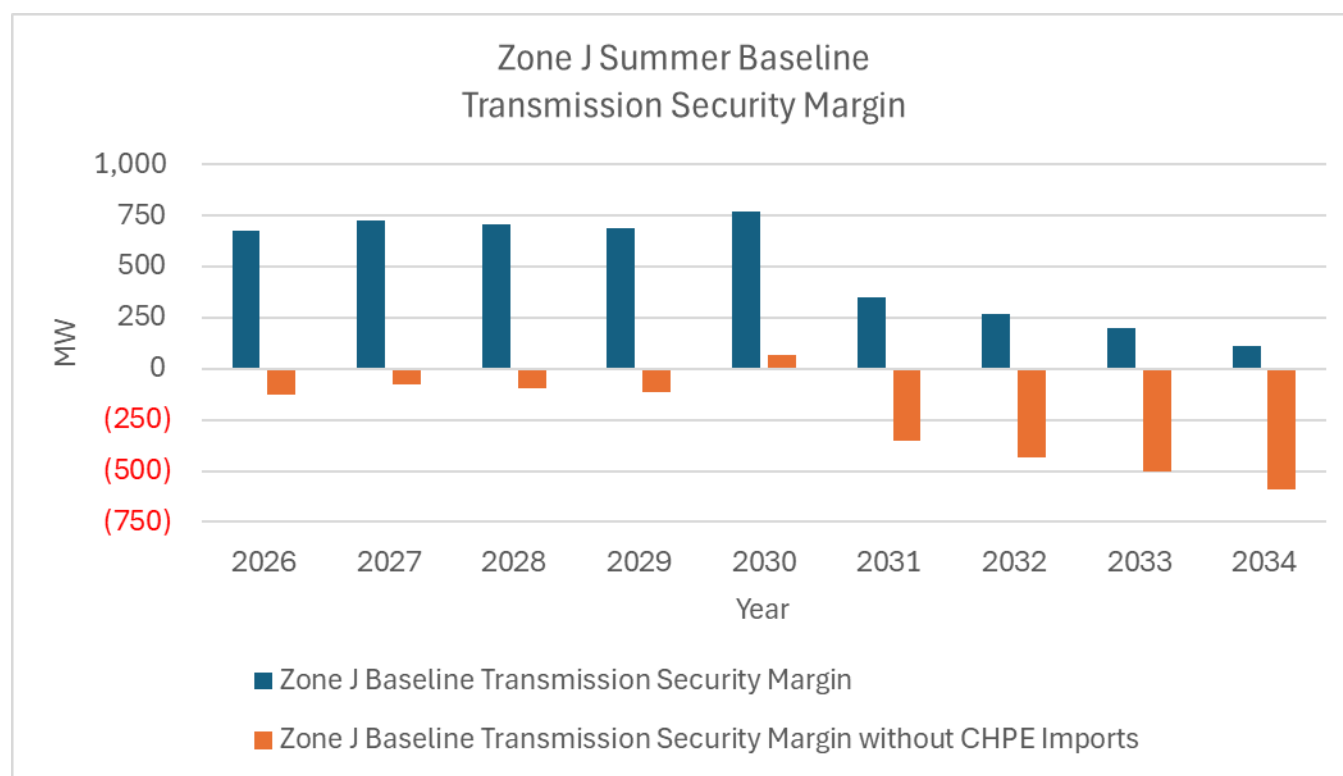
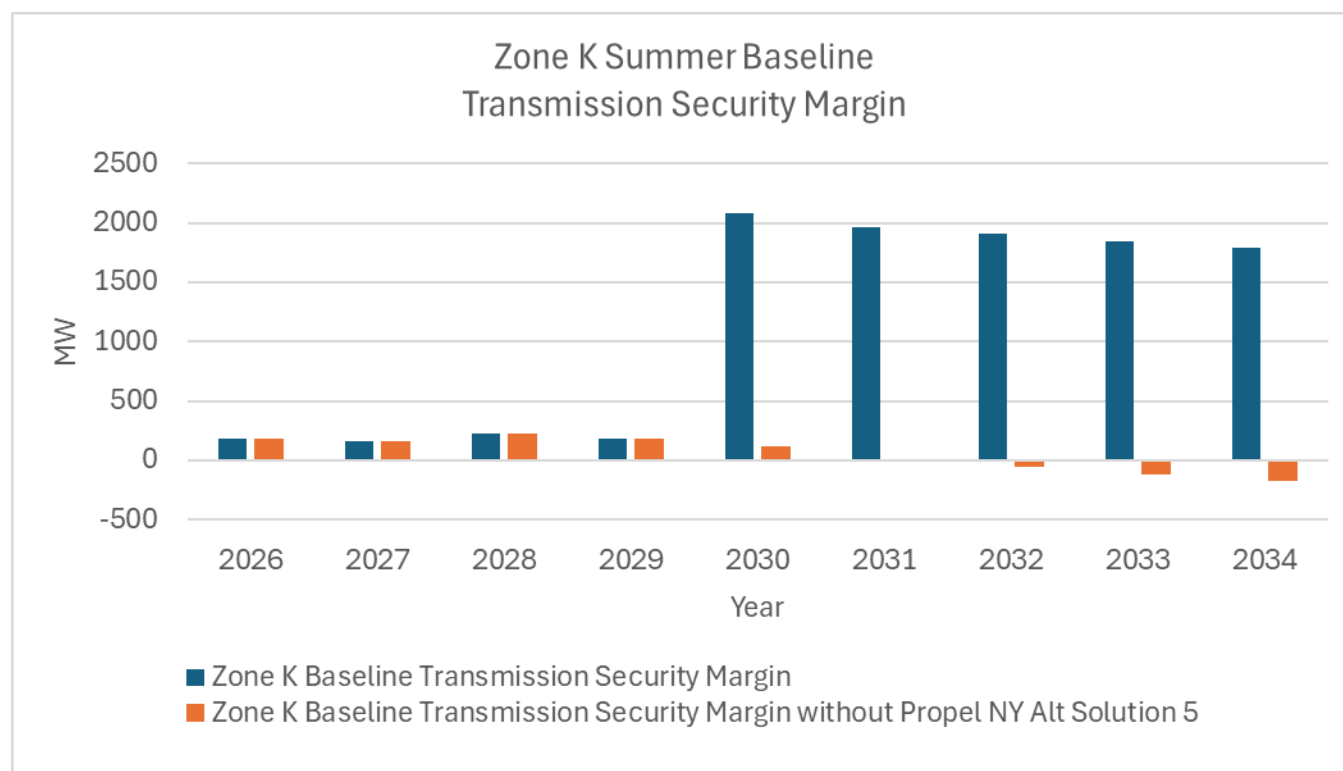


Figure 34: Zone K Transmission Security Margin with Impact of Project Delays



Additional Resources

Narrowing statewide reliability margins are observed in the baseline statewide system margin results, indicating that no surplus power would remain by 2034 without further resource development. As discussed above, the calculation of the baseline statewide system margin in this CRP only assumes a subset of the total resources in the NYISO's interconnection queue. The narrowing reliability margins could be positively impacted by the advancement of projects that have completed the NYISO interconnection process, as well as the retention or replacement of existing generators. This assessment of additional resources evaluates:

- **Cluster Baseline Assessment (CBA) Case** – The generation projects summarized in Figure 35 have previously accepted cost allocation through the NYISO interconnection process but do not yet meet other requirements of the reliability planning base case inclusion rules. Two scenarios, storage on and off, consider the impact if the energy storage projects have sufficient state of charge to deliver power during the duration of the peak demand periods.

Figure 35: Additional Resources from CBA Case¹⁴

CBA Additional Resources	Land-Based Wind	Off-Shore Wind	Solar*	Energy Storage
Nameplate MW	1,158	0	4,219	2,519
Summer Derated MW Capability	58	0	506	2,519
Winter Derated MW Capability	116	0	0	2,519

*Utility-scale solar resources are dispatched at the same factor as the BtM solar resources for a given transmission security case. Derated MW Capabilities provided are for 2034.

Additionally, this assessment considers the impact of retaining or replacing existing units with functionally equivalent resources. For example, the impact of the potential retirement or replacement of the NYPA small natural gas power plants is shown.

- **NYPA Small Gas Plants** – The baseline analysis assumes NYPA's seven small natural gas power plants (simple-cycle combustion turbines) in New York City and Long Island are removed by 2031, despite having a relatively young age of 27 years. This scenario looks at the impact if the 517 MW plants are either retained or replaced by functionally equivalent generation.

¹⁴ Statewide system margin calculations assume the following intermittent generation dispatch values: land-based wind dispatch: 5% in summer, 10% in winter; offshore wind dispatch: 10% in summer, 15% in winter; solar dispatch: varies between 12%-20% in summer depending on study year, 0% in winter. Further details on the background of these assumptions can be found in the May 23, 2022 ESPWG meeting materials ([here](#)).

Many of the uncertainties highlighted in earlier sections pose significant reliability risks. Figure 36 shows how new resource entry and retaining existing generation can help offset those risks.

Figure 36: Statewide System Margin Impact of Additional Resources

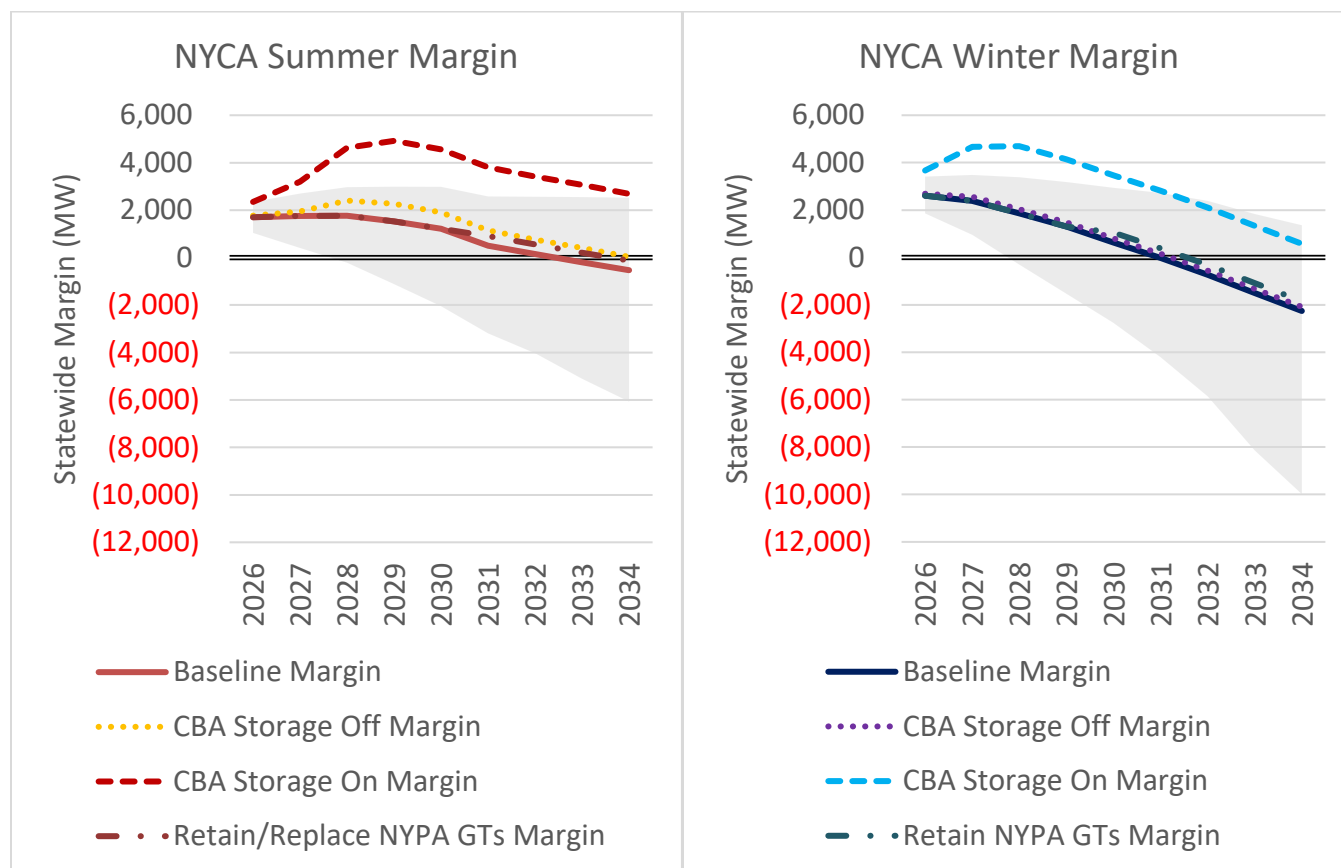
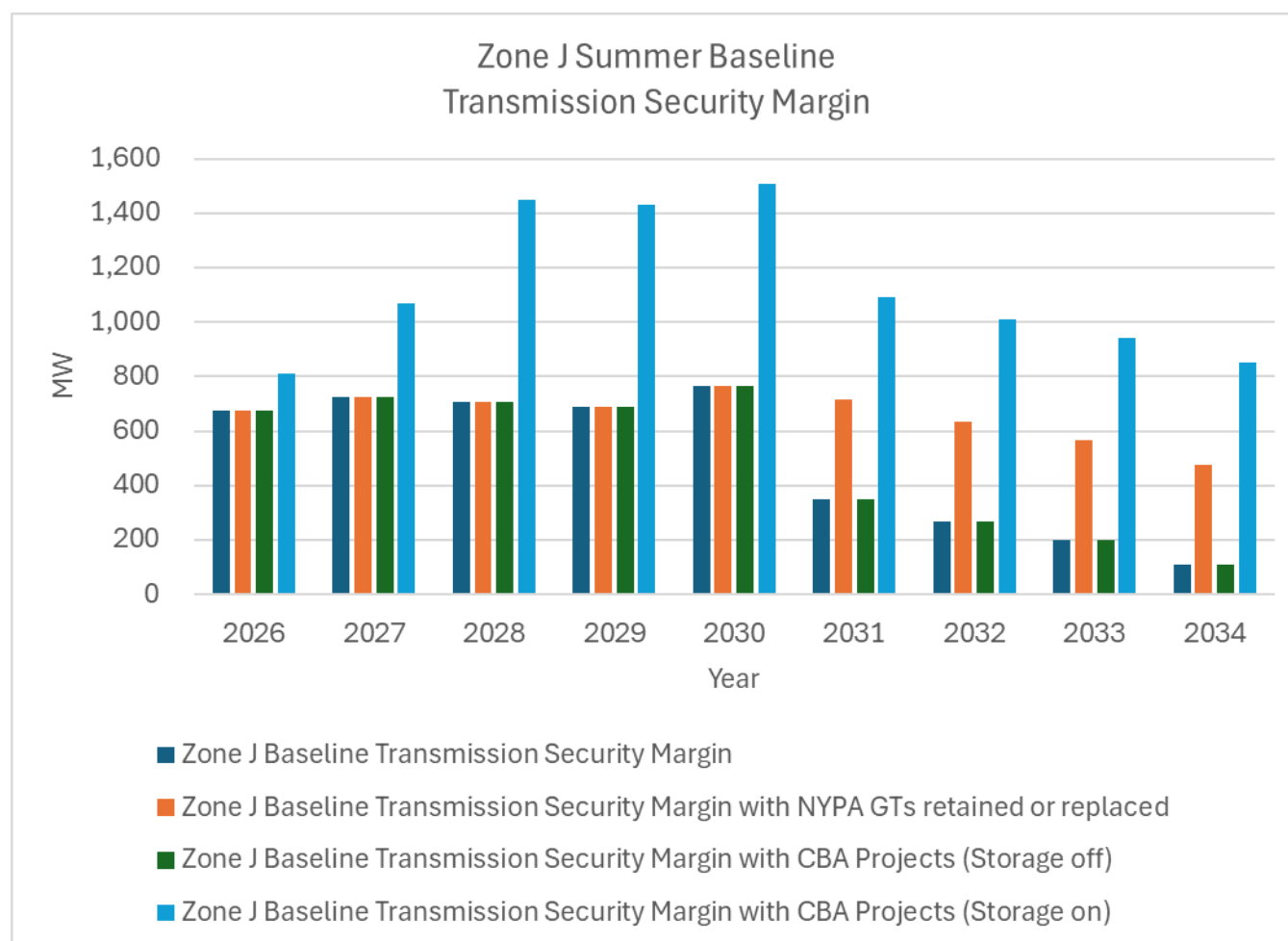


Figure 37: Zone J Transmission Security Margin with Impact of Additional Resources



Plausible Combinations of System Risks

In addition to the assessment of the uncertainty around each individual key system factor discussed above, this CRP takes the additional step to examine combinations of these uncertainties to understand and highlight how different plausible configurations can benefit or harm system reliability margins beyond the assumed “baseline” condition. Figure 35 and Figure 36 show that, in most of the combinations assessed, which are more fully described herein, the statewide system margins during summer and winter peak conditions decrease over time. Most of the combinations of scenarios show decreasing margins through 2034 with the range of future margins growing over time. The most optimistic scenario combinations show positive margins by 2034 that are roughly equivalent to today’s margins in the positive 2,000 MW range. On the other hand, the most pessimistic scenario combinations show deficiencies of up to 10,000 MW by 2034.

Figure 38: Summer Statewide System Margin Risks

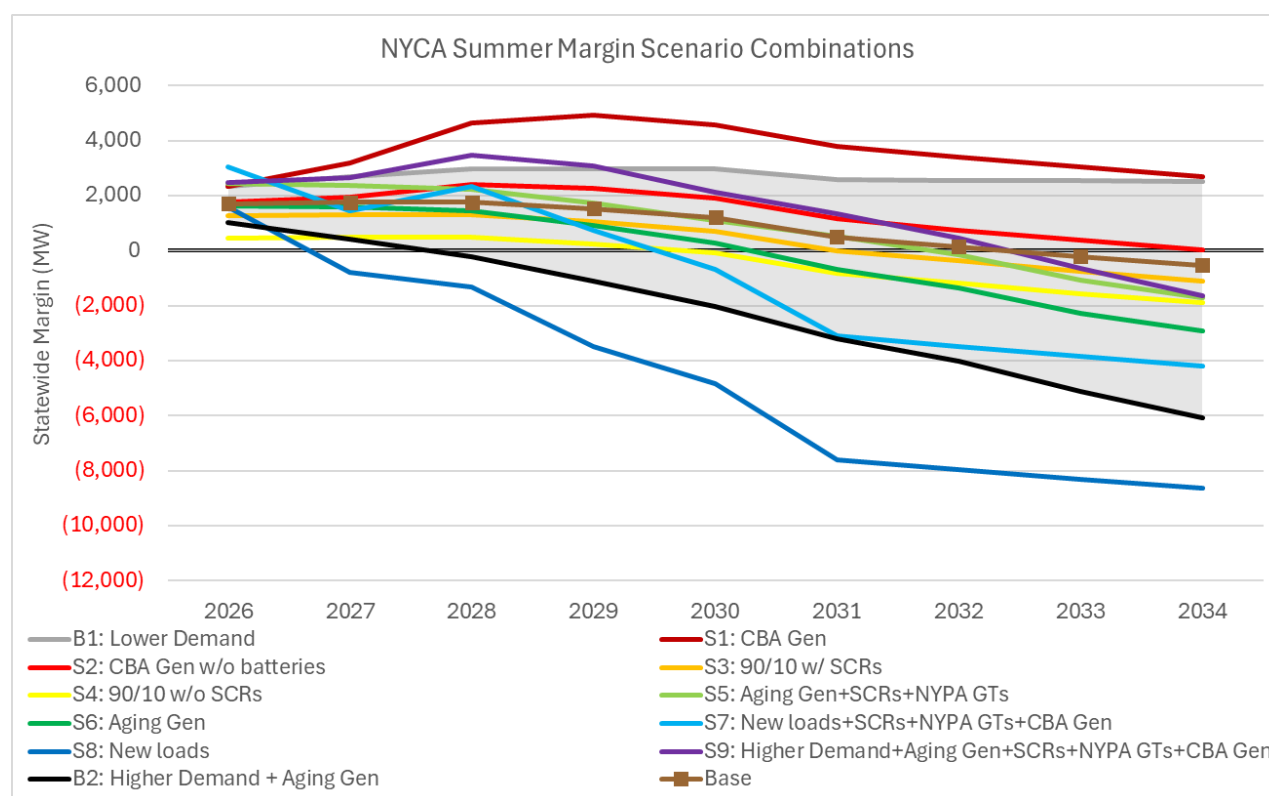
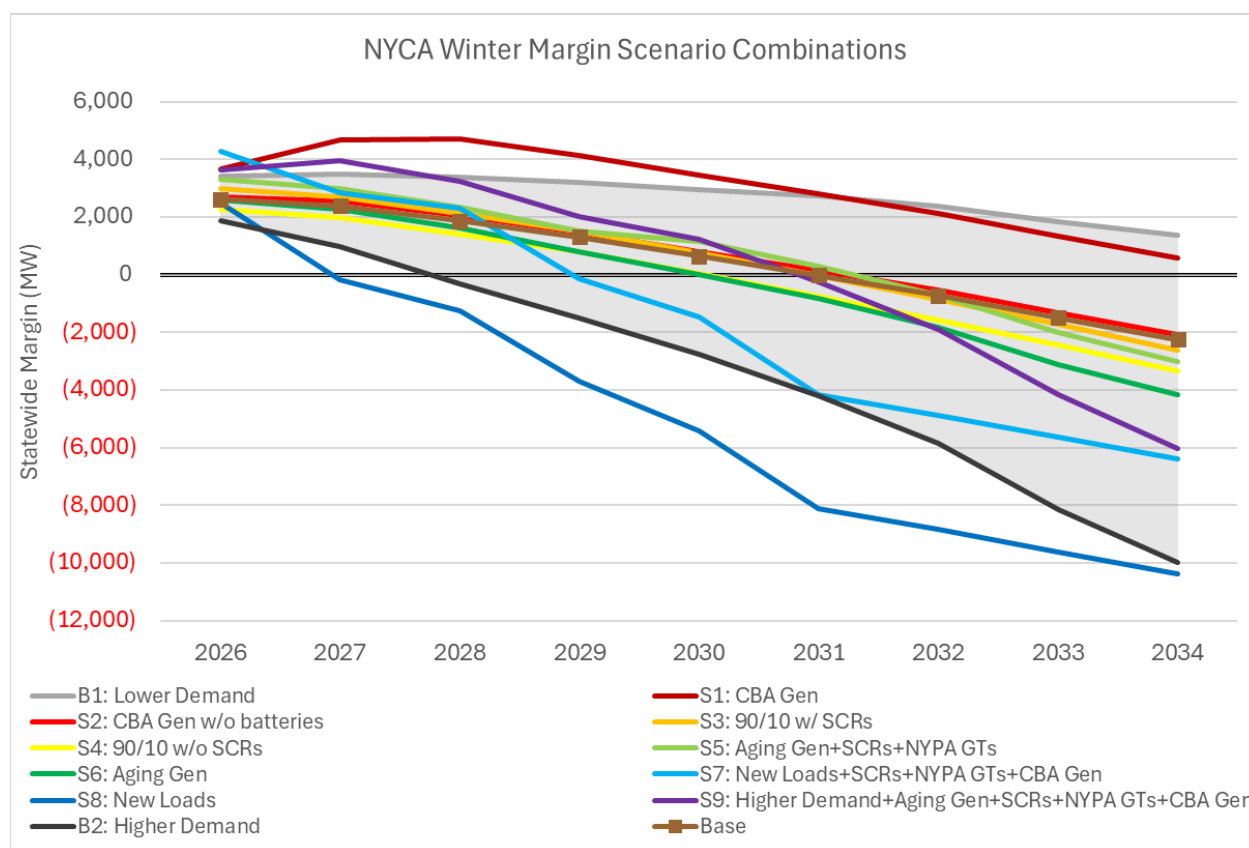


Figure 39: Winter Statewide System Margin Risks



Short summaries are given below to describe how each scenario combination differs from the baseline statewide system margin assessed in this CRP. Some factors describe long-term trends, such as generation construction and retirements, while others describe load or generation behavior on the peak hour, such as battery storage discharging or use of SCRs. Two combination scenarios (i.e., B1 – Boundary Scenario 1 and B2 – Boundary Scenario 2, as detailed below) are designated as boundary scenarios because between them, they capture a realistic range of statewide system margins. The grey shaded area between boundary scenario margins is used as a reference for the statewide system margin charts in the rest of the CRP.

■ Baseline

- Assumed System Conditions: Conditions on the peak hour align with baseline statewide system margin assumptions for load, weather, conventional generation availability, solar and wind generation levels, and import availability.
- Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 500 MW; winter is **deficient** by approximately 2,300 MW.

■ B1 – Boundary Scenario 1

- Assumed System Conditions: Demand growth follows the Lower Demand forecast from the 2025 Gold Book.

- Expected Statewide System Margin in 2034: Summer is **sufficient** by approximately 2,500 MW; winter is **sufficient** by approximately 800 WM.
- **S1 – Scenario 1**
 - Assumed System Conditions: All CBA generation in the queue is constructed on schedule, and battery storage is discharging at maximum output during the peak hour.
 - Expected Statewide System Margin in 2034: Summer is **sufficient** by approximately 2,800 MW; winter is **sufficient** by approximately 600 MW.
- **S2 – Scenario 2**
 - Assumed System Conditions: All CBA generation in the queue is constructed on schedule, and no battery storage is discharging during the peak hour.
 - Expected Statewide System Margin in 2034: Summer is **sufficient** by approximately 100 WM, winter is **deficient** by approximately 2,100 MW.
- **S3 – Scenario 3**
 - Assumed System Conditions: A heatwave occurs in summer, and a cold snap occurs in winter, and SCRs are called and respond in line with historical performance.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 100 MW, winter is **deficient** by approximately 2,600 MW.
- **S4 – Scenario 4**
 - Assumed System Conditions: A heatwave occurs in summer, and a cold snap occurs in winter.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 1,900 MW, winter is **deficient** by approximately 3,300 MW.
- **S5 – Scenario 5**
 - Assumed System Conditions: Aging generation retires in line with NYISO’s preliminary forecasting method; SCRs are called and respond in line with historical performance; and NYPA small plants are retained or replaced with functional equivalents.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 1,700 MW, winter is **deficient** by approximately 3,000 MW.
- **S6 – Scenario 6**
 - Assumed System Conditions: Aging generation retires in line with NYISO’s preliminary forecasting method.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 2,900 MW, winter is **deficient** by approximately 4,100 MW.
- **S7 – Scenario 7**
 - Assumed System Conditions: All large loads currently in the interconnection process connect to the NYCA; SCRs are called and respond in line with historical performance, NYPA small plants are retained or replaced with functional equivalents; all CBA generation in the queue is constructed on schedule; and all battery storage is discharging at maximum output during the peak hour.

- Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 4,100 MW, winter is **deficient** by approximately 6,400 MW.
- **S8 – Scenario 8**
 - Assumed System Conditions: All large loads currently in the interconnection process connect to the NYCA.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 8,600 MW, winter is **deficient** by approximately 10,300 MW.
- **S9 – Scenario 9**
 - Assumed System Conditions: Demand growth follows the Higher Demand forecast, aging generation retires in line with NYISO’s preliminary forecasting method; SCRs are called and respond in line with historical performance; NYPA small plants are retained or replaced with functional equivalents; all CBA generation in the queue is constructed on schedule; and all battery storage is discharging at maximum output during the peak hour.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 1,500 MW, winter is **deficient** by approximately 6,000 MW.
- **B2 – Boundary Scenario 2**
 - Assumed System Conditions: Demand growth follows the Higher Demand forecast and aging generation retires in line with NYISO’s preliminary forecasting method.
 - Expected Statewide System Margin in 2034: Summer is **deficient** by approximately 6,100 MW, winter is **deficient** by approximately 10,000 MW.

While this section assessed how individual and combined uncertainties affect statewide system margins, the next section will evaluate whether these conditions could result in exceeding the resource adequacy criterion and explore potential solution pathways.

Potential Pathways to a Reliable Grid

The 2022 RNA and 2024 RNA show a clear trend toward narrowing reliability margins, which are only compounded by the risks and uncertainties highlighted earlier in the CRP. The two biggest uncertainties that affect the future reliability of the New York system are demand growth (including large loads) and the reliance on the aging thermal generation fleet. The CRP further explores the interaction of these two key factors and potential pathways to maintain reliability for different scenarios. Unlike the previous section, which evaluated reliability using statewide system margins, this section applies probabilistic resource adequacy analysis to more clearly assess whether reliability needs could emerge under various scenarios. Using Loss of Load Expectation (LOLE) as a metric, this section gives more of an indication of when the system may fall short of reliability standards and help identify the types and magnitude of potential solutions that could resolve those deficiencies, as follows:

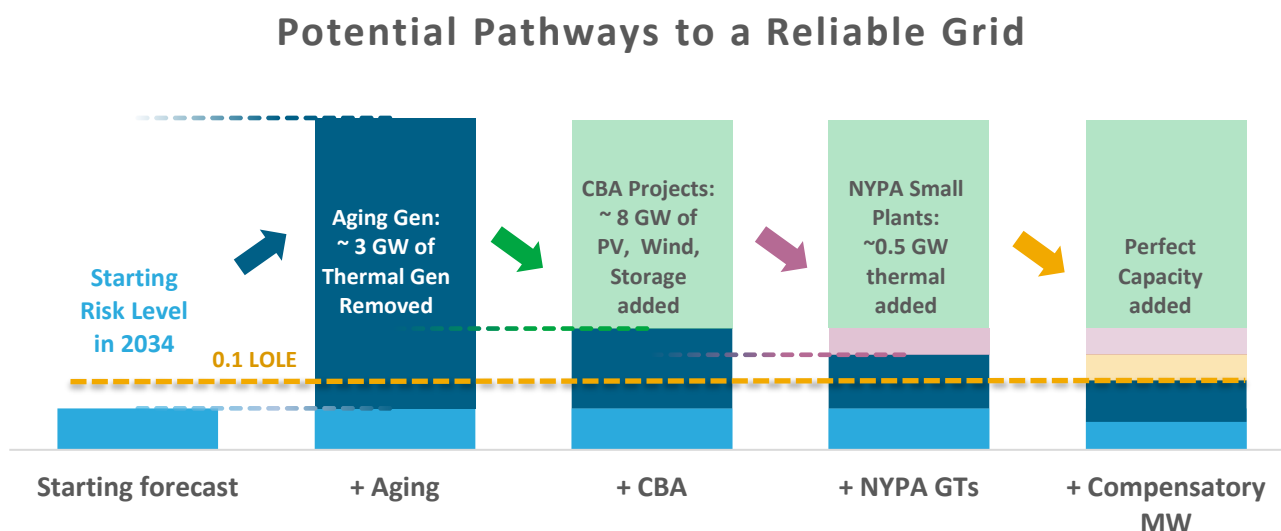
- Resource adequacy was assessed over the 2026-2034 period;

- The Lower Demand, Baseline, and Higher Demand forecasts are assessed to evaluate reliability over the range of demand uncertainty;
- Effects of aging generation are modeled in each of the three demand forecasts using the statistical retirement risk model described in Appendix C; and
- If any of the scenarios exceed the 0.1 event-days/year LOLE criterion, different generalized scenarios are modeled to try to address the resource deficiency:
 - CBA: Generation and storage projects are added that have accepted cost allocation in the generator interconnection process, but do not yet meet reliability base case inclusion rules. This scenario adds 4,219 MW of solar, 1,158 MW of wind, and 2,519 MW of storage.
 - CBA + NYPA Small Plants: The NYPA small gas plants, totaling 517 MW in Zones J and K, are modeled as in-service past 2031 to represent either retention or inclusion of a comparable replacement. This scenario is intended to highlight the beneficial contribution to reliability from the power and operating characteristics of the NYPA small gas plants after 2030. This scenario is not intended to assess or reflect NYPA's May 2025 plan, which includes assessments that would conduct detailed evaluations of emissions impacts from deactivating its small gas plants and would evaluate impacts and retirements on a plant-by-plant basis, including the reuse of these sites for battery energy storage.¹⁵
 - CBA + NYPA Small Plants + Additional Generation: Compensatory MW in the form of perfect capacity additions are added statewide to indicate the remaining resources that would have to be procured to bring the system within LOLE criterion.

Figure 40 below illustrates the sequence of analysis. Further details on the Resource Adequacy models, concepts, and results are in Appendix E.

¹⁵ New York Power Authority, Small Natural Gas Power Plants, <https://www.nypa.gov/small-natural-gas-power-plants> (last visited September 19, 2025).

Figure 40: Potential Pathways to a Reliable Grid



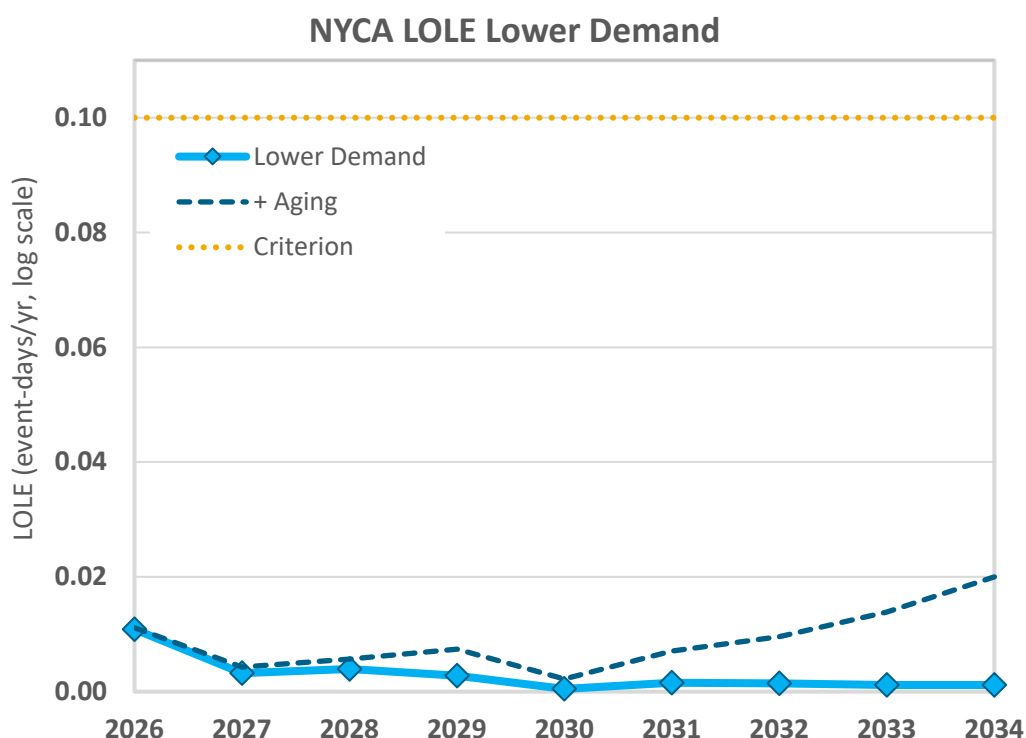
Lower Demand Forecast

Figure 41 below compares the annual, summer, and winter NYCA LOLE of the Lower Demand forecast with and without the effect of aging generation risks. As expected, the aging generation assumption increased the LOLE from the analysis with solely the Lower Demand forecast; however, the NYCA LOLE is still below the 0.1 event-days/year criterion, with the Lower Demand forecast.

Figure 41: NYCA LOLE with Lower Demand Forecast Table

		NYCA LOLE (event-days/yr)								
Case	Season	2026	2027	2028	2029	2030	2031	2032	2033	2034
Lower Demand	Annual	0.011	0.003	0.004	0.003	0.000	0.002	0.001	0.001	0.001
	Summer	0.011	0.003	0.004	0.003	0.000	0.002	0.001	0.001	0.001
	Winter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
+ Aging	Annual	0.011	0.004	0.006	0.007	0.002	0.007	0.010	0.014	0.020
	Summer	0.011	0.004	0.006	0.007	0.002	0.007	0.010	0.013	0.019
	Winter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.001

Figure 42: NYCA LOLE with Lower Demand Forecast Graph



Baseline Demand Forecast

Figure 39 below compares the annual, summer, and winter NYC LOLE of the Baseline demand forecast with and without the effect of aging generation risks. As expected, the Baseline demand forecast with the aging generation assumption increased the LOLE compared to the LOLE for the Baseline demand forecast with violations of the criterion starting in 2033.

The following additional scenarios were performed to further characterize the nature of the criterion violations and identify the impact of possible solutions for the Baseline demand forecast:

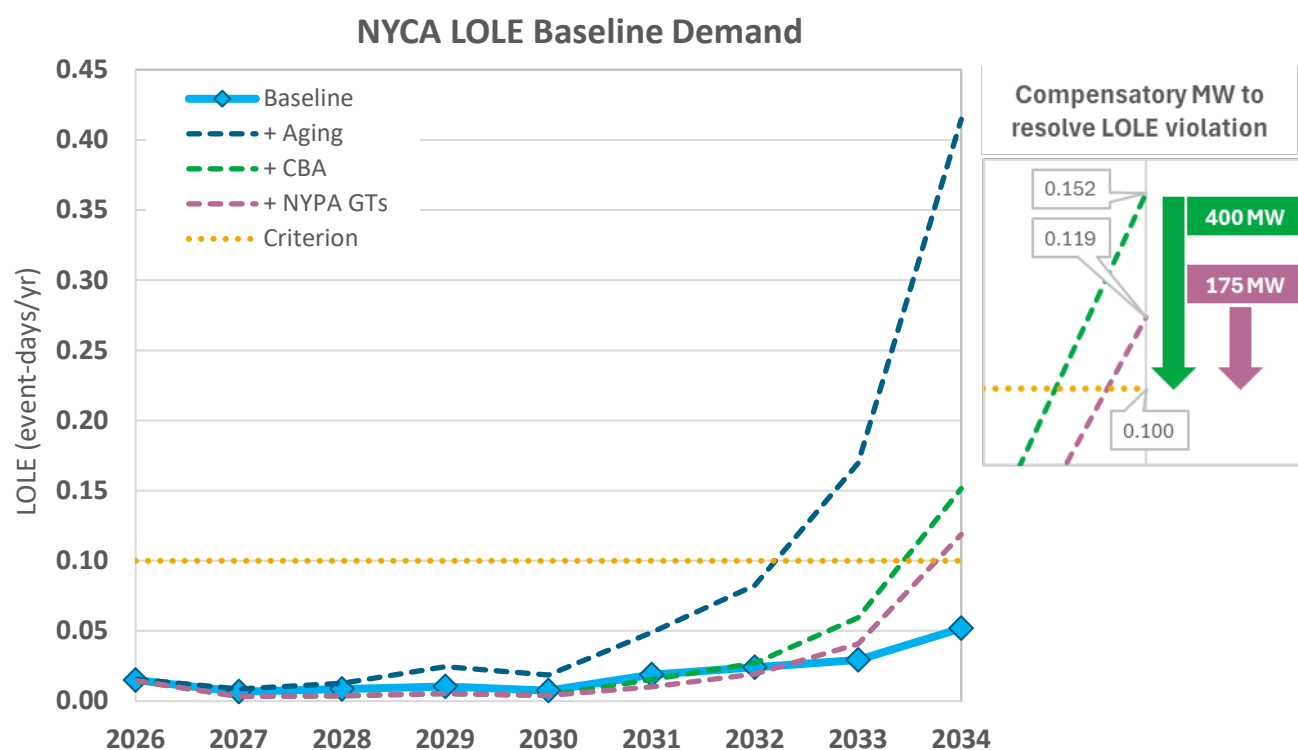
- **Baseline Demand Forecast + Aging Generation + CBA Scenario:** The CBA scenario of adding roughly 8,000 MW of proposed renewable and storage projects addressed the NYCA LOLE violations in 2033 and lowered the LOLE in 2034, but not below its criterion of 0.1 event-days/year.
- **Baseline Demand Forecast + Aging Generation + CBA + NYPA Small Plants Scenario:** To further address the remaining violation in year 2034, the NYPA small plants were modeled as in-service starting in 2031. This further lowers the NYCA LOLE; however, it is still not below its criterion.

These additional scenario analyses identified that roughly 400 MW of additional “perfect capacity” is needed in the scenario with the addition of the CBA assumption to remain within criterion through 2033 and about 175 MW with the addition of both the CBA and NYPA Small Plants assumptions to remain within criterion out to 2034.

Figure 43: NYCA LOLE with Baseline Forecast Table

NYCA LOLE (event-days/yr)										
Case	Season	2026	2027	2028	2029	2030	2031	2032	2033	2034
Baseline	Annual	0.015	0.007	0.009	0.010	0.008	0.019	0.024	0.029	0.052
	Summer	0.015	0.007	0.008	0.010	0.008	0.019	0.024	0.026	0.031
	Winter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.004	0.021
+ Aging	Annual	0.016	0.009	0.013	0.025	0.019	0.049	0.083	0.170	0.415
	Summer	0.016	0.009	0.013	0.025	0.019	0.049	0.081	0.142	0.244
	Winter	0.000	0.000	0.000	0.000	0.000	0.000	0.001	0.028	0.171
+ CBA	Annual	0.014	0.003	0.004	0.005	0.004	0.015	0.027	0.060	0.152
	Summer	0.014	0.003	0.004	0.005	0.004	0.015	0.027	0.051	0.086
	Winter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.009	0.066
Compensatory MW (LOLE = 0.1 event-days/yr), Load Ratio										400
+ NYPA GTs	Annual	0.014	0.003	0.004	0.005	0.004	0.010	0.019	0.041	0.119
	Summer	0.014	0.003	0.004	0.005	0.004	0.010	0.019	0.032	0.053
	Winter	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.009	0.066
Compensatory MW (LOLE = 0.1 event-days/yr), Load Ratio										175

Figure 44: NYCA LOLE with Baseline Forecast Graph



The figure below visually depicts three reliability indices by summer versus winter and shows summer has more risk than winter within the 10-year study period.

Figure 45: Resource Adequacy Reliability Indices

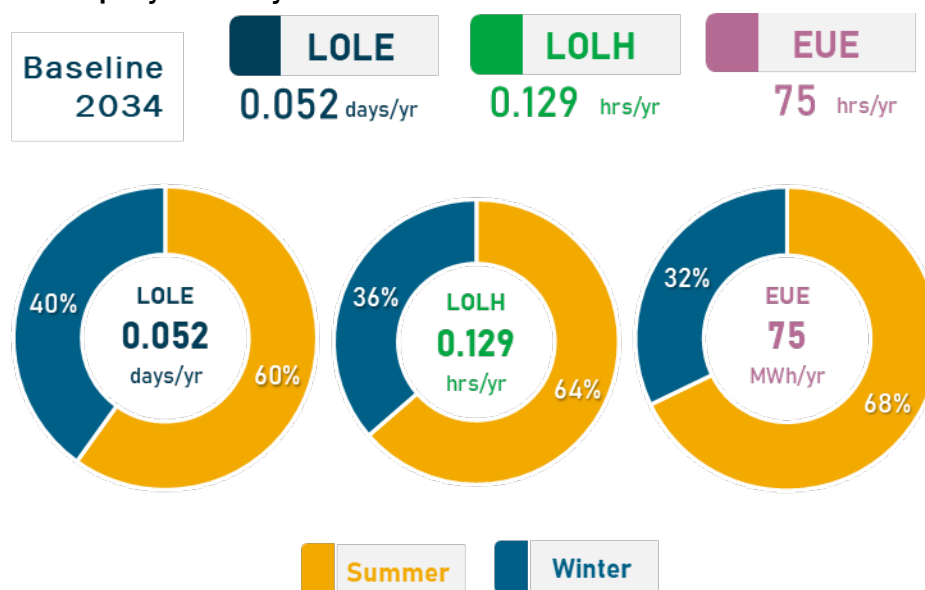
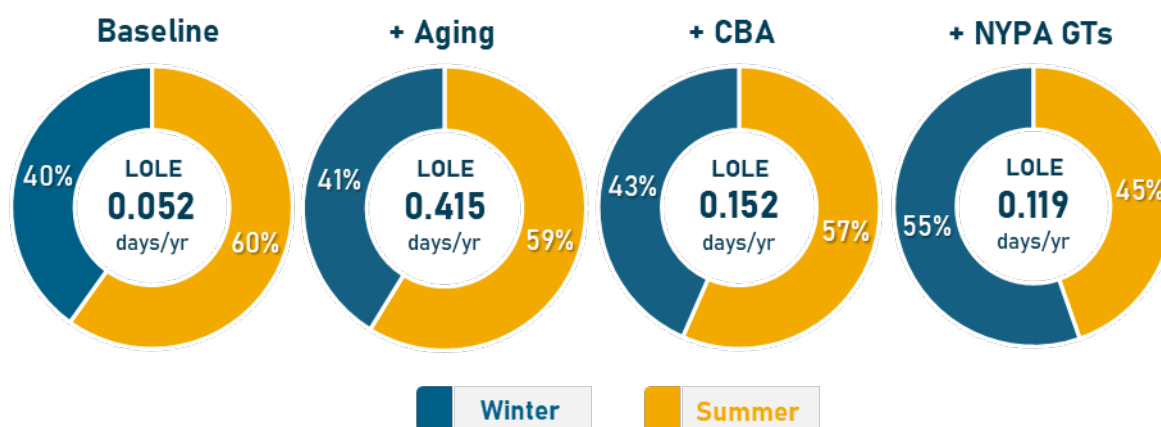


Figure 46: 2034 LOLE Results with Impacts of Uncertainty



Higher Demand Forecast

Figure 47 below compares the annual, summer, and winter NYCA LOLE of the Higher Demand forecast with and without the effect of aging generation risks. With solely the Higher Demand forecast, the NYCA LOLE is above its criterion starting in year 2031. The addition of the aging generation assumption further increased the NYCA LOLE across all years studied; however, it advanced the first year that the LOLE exceeded criterion to be year 2030. Notably, with the aging generation assumption, the LOLE is at criterion beginning in 2029.

Based on the foregoing, the CRP conducted additional scenarios to further characterize the nature of the criterion violations and to identify the impact of possible solutions.

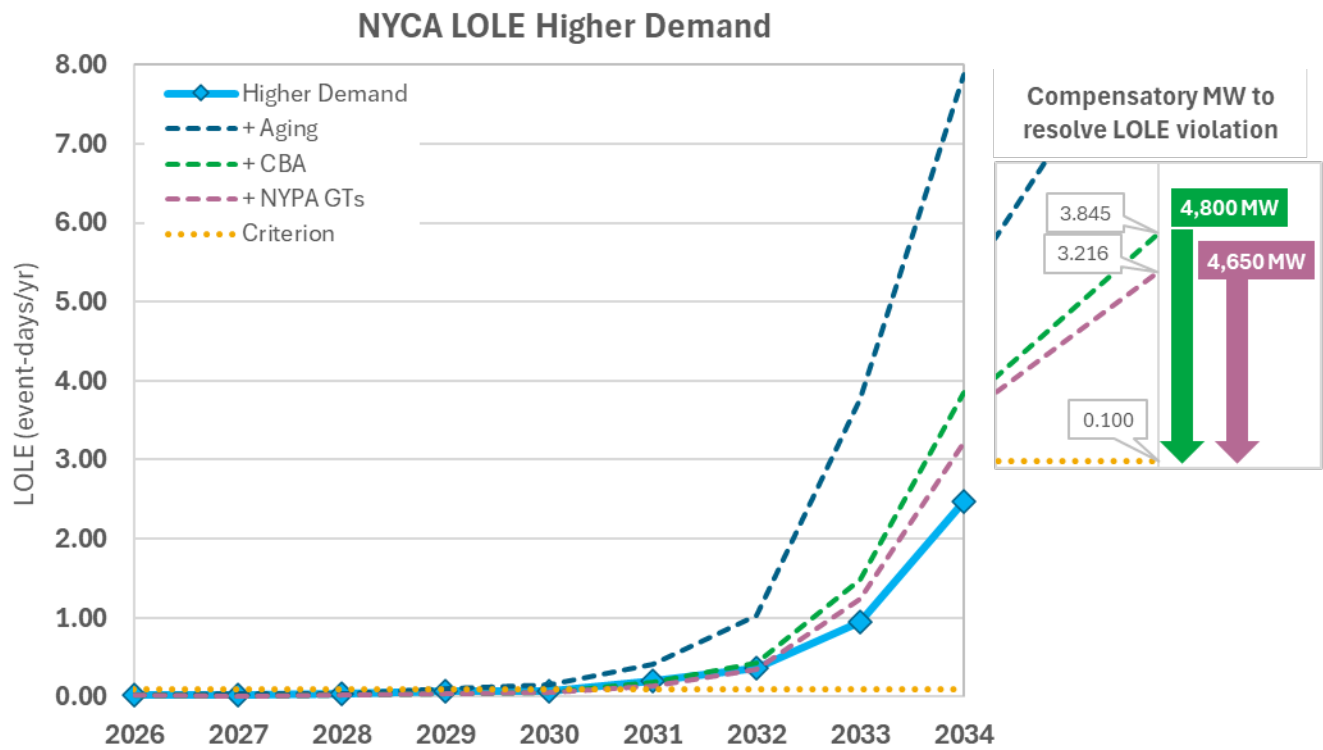
- **Higher Demand Forecast + Aging Generation + CBA Scenario:** This CBA scenario added roughly 8,000 MW of proposed renewable and storage projects but, in doing so, shifted the criterion violation later by only one year with the NYCA LOLE violations starting in year 2031 as opposed to year 2030.
- **Higher Demand Forecast + Aging Generation + CBA + NYPA Small Plants Scenario:** To further address the remaining violation in year 2034, the NYPA small plants were modeled as in-service starting in year 2031. This additional assumption further lowers the NYCA LOLE; however, the system is still not below its criterion starting in year 2031.

These additional scenario analyses also identified that bring NYCA LOLE to or below criterion, roughly 4,800 MW of additional “perfect capacity” is needed in the scenario with the addition of the CBA assumption and about 4,675 MW with the addition of both the CBA and NYPA small plant assumptions.

Figure 47: NYCA LOLE with Higher Demand Forecast Table

		NYCA LOLE (event-days/yr)								
Case	Season	2026	2027	2028	2029	2030	2031	2032	2033	2034
Higher Demand	Annual	0.026	0.022	0.036	0.073	0.073	0.195	0.358	0.950	2.469
	Summer	0.026	0.022	0.033	0.050	0.069	0.171	0.264	0.363	0.620
	Winter	0.000	0.000	0.003	0.022	0.004	0.024	0.094	0.587	1.848
+ Aging	Annual	0.027	0.041	0.044	0.100	0.153	0.417	1.030	3.772	7.866
	Summer	0.027	0.041	0.042	0.080	0.148	0.379	0.781	1.914	4.043
	Winter	0.000	0.000	0.003	0.020	0.005	0.038	0.249	1.858	3.823
+ CBA	Annual	0.023	0.012	0.018	0.035	0.049	0.184	0.434	1.478	3.845
	Summer	0.023	0.012	0.017	0.028	0.049	0.173	0.349	0.715	1.613
	Winter	0.000	0.000	0.001	0.007	0.001	0.011	0.085	0.763	2.232
Compensatory MW (LOLE = 0.1 event-days/yr), Load Ratio										4,800
+ NYPA GTs	Annual	0.023	0.012	0.018	0.035	0.049	0.135	0.346	1.241	3.216
	Summer	0.023	0.012	0.017	0.028	0.048	0.125	0.262	0.520	1.134
	Winter	0.000	0.000	0.001	0.007	0.001	0.011	0.084	0.721	2.082
Compensatory MW (LOLE = 0.1 event-days/yr), Load Ratio										4,675

Figure 48: NYCA LOLE with Higher Demand Forecast Graph



Reliability Planning Role in Identifying Solutions

When accounting for the risks associated with the system's reliance on aging generation, the preliminary scenario findings of this CRP show the likelihood of identifying resource adequacy deficiencies within the 10-year planning horizon for all scenarios that are based on the Baseline and Higher Demand forecasts.

If a future RNA identifies a Reliability Need, the NYISO would solicit and identify solutions through its Reliability Planning Process. These solutions may include market-based proposals, regulated backstop solutions, or alternative regulated solutions.

- **Market-based solutions** – solutions that may include generation, merchant transmission, or demand response resources for which the developer of the project is responsible for the cost of the project and will not recover the costs through a regulated rate.
- **Regulated backstop solutions** – solutions submitted by a Responsible Transmission Owner in accordance with, among other things, the tariff that serve as a backstop in the absence of other viable and sufficient solutions being able to address the Reliability Need. Such solutions may include generation, transmission, or demand side resources and seek cost recovery through a regulated rate either through the NYISO's tariff for transmission facilities or through an established cost recovery procedure established by an appropriate state entity.
- **Alternative regulated solutions** – solutions submitted by a Transmission Owner or other developer that seek a regulated rate and, while principally aimed at transmission solutions that would be considered for selection as the more efficient or cost-effective solution to the Reliability Need, may include generation, transmission, or demand-response resources.

The NYISO's process to identify solutions to an identified Reliability Need in the Reliability Planning Process gives priority to viable and sufficient market-based solutions as these projects do not require out-of-market actions. If the NYISO does not receive any viable and sufficient market-based solutions that address the Reliability Need, then NYISO would rely on the regulated backstop solution and/or alternative regulated solutions to address the need. However, in the case of a statewide resource deficiency, it may be impossible or impractical for transmission to solve the need.

Aligning Reliability Planning with Operational Realities

Operational experience from the June 2025 heatwave revealed how quickly tight resource margins and limited system flexibility can lead to stressed conditions, even when overall resource adequacy appears sufficient. These events emphasized the importance of incorporating real-world system behavior into planning assumptions. At the same time, planning studies continue to show a growing disconnect between resource adequacy metrics, which assume emergency actions are available, and transmission security assessments, which must prove reliability under normal operating conditions. Compounding these challenges, voltage performance across the system is becoming increasingly difficult to manage, requiring more frequent operator intervention. Together, these observations point to the need for a planning framework that better reflects operational realities and anticipates emerging reliability risks.

Lessons Learned from June 2025 Heatwave

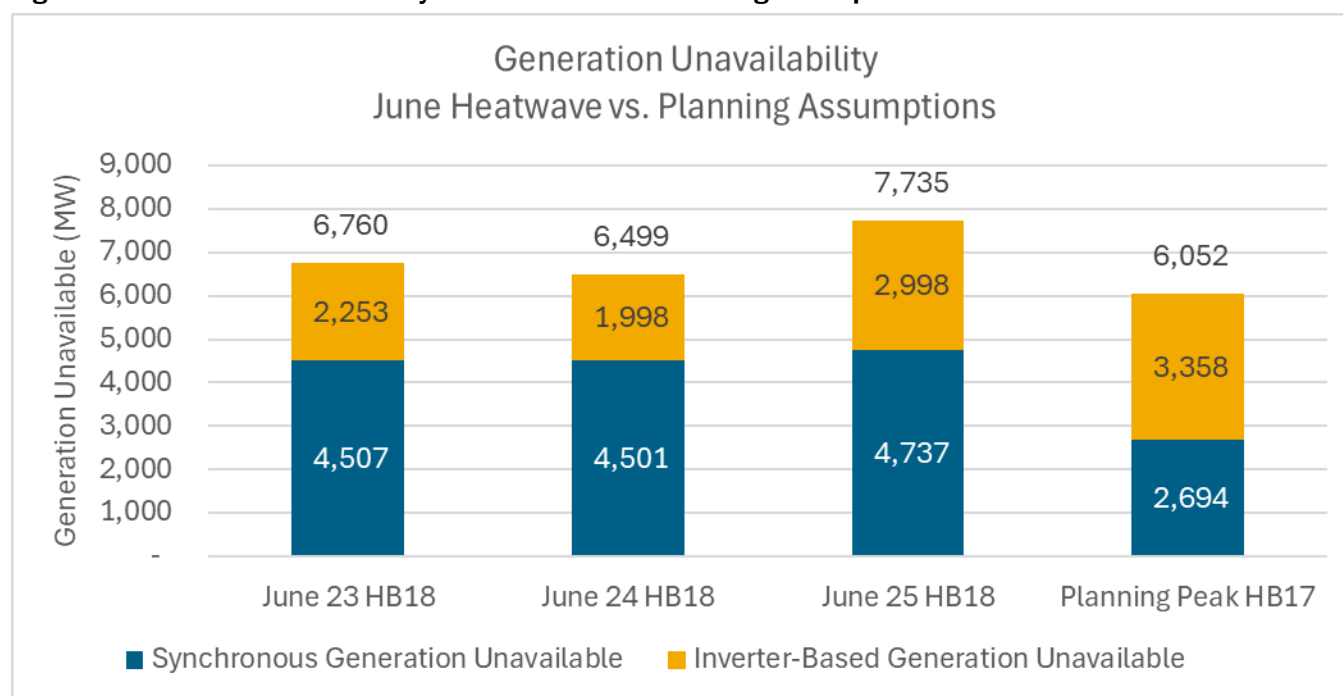
The reliability challenges experienced during the June 2025 heatwave revealed critical insights into system performance under extreme conditions. The following table summarizes key observations and planning considerations for incorporation into future reliability planning studies.

Figure 49: June Heatwave Observations and Planning Recommendations

Category	Recommendation to Aligning Reliability Planning with Operational Realities
Load Conditions	Test load forecasting models for extreme weather; assess risks to operation due to under forecasting (see “Plausible Combinations of System Risks” Section of this CRP)
System-wide Impact	Further explore reliability impacts under wide-area extreme weather events (see “Plausible Combinations of System Risks” Section of this CRP)
New York Resource Unavailability	Conduct root cause analysis to investigate resource unavailability (see “Plausible Combinations of System Risks” Section of this CRP)

One key observation, shown in Figure 50 below, is that the observed intermittent generation generally performed better during the peak hour than in the planning assumptions used in the CRP statewide system margin calculations. However, the synchronous (thermal and hydro) generation performed worse than expected in the planning assumptions.

Figure 50: Generation Unavailability: June Heatwave vs. Planning Assumptions



The NYISO will further investigate the stressed system conditions from the June heatwave and other observations from real time operations. These findings, in conjunction with the other factors highlighted in the CRP (see “Planning for a Growing Rand of Plausible Futures”), will inform the recommendations for refining future planning assumptions.

Resource Planning for Normal Operation

In reliability planning standards, system reliability is determined by resource adequacy and transmission security analyses, described below, according to Reliability Criteria established by NERC, NPCC, and NYSRC.

- **Resource Adequacy:** The ability of the electric systems to supply the aggregate electrical demand and energy requirements of their customers at all times, taking into account scheduled and reasonably expected unscheduled outages of system elements.
- **Transmission Security:** The ability of the power system to withstand disturbances, such as electric short circuits or unanticipated loss of system elements and continue to supply and deliver electricity. Transmission security is assessed deterministically with potential disturbances being applied without concern for the likelihood of the disturbance in the assessment.

Transmission security is governed by standards that ensure the system can reliably deliver power under typical conditions, including adherence to applicable contingency criteria (e.g., N-1-1, N-1-1-0, etc.)

and sustainable operating limits. In contrast, resource adequacy standards are based solely on emergency criteria assumes that operators can routinely deploy all tools available to them—such as voltage reductions, higher operating limits that can fatigue equipment, and emergency assistance from neighboring systems—to maintain reliability. This assumption introduces systemic risk, as these tools are not guaranteed to be available or effective under all circumstances. Critically, this also creates a divide between the resource adequacy evaluations intended to ensure sufficient resources to meet demand and the transmission security evaluations intended to ensure the transmission system is capable of delivering those resources to each demand customer.

A clear example of this disconnect was seen in the development of power flow cases used in the 2024 RNA transmission security analysis. Resource adequacy studies showed there was sufficient capacity in the system to meet the 0.1 event-days/year LOLE criterion for study year 2034. However, there was an 1,800 MW resource shortfall when representing expected winter peak demand system conditions without employing techniques beyond normal operating criteria—i.e., increasing imports beyond contracted amounts; invoking SCRs; reducing reserves; or reducing load. While these tools are available to operators, they are not consistent with normal planning system conditions studied in transmission security and, therefore, not assumed. To further illustrate the point, LOLE is not the only metric to determine if the system can be reliably operated. Since LOLE of 0.1/year is a pass/fail test of resource adequacy, a system with LOLE of 0.05 cannot be assumed to be 5 times less secure than a system with LOLE of 0.01.¹⁶

The New York power system, as modeled for transmission security analyses, reflects a future with shrinking generation reserves due to generator retirements, the intermittent nature of new solar and wind generation, and the increase in load during the expected most stressed snapshots in time. This low level of reserves restricts the ability to redispatch the system to secure for potential thermal overloads or voltage violations as first observed in the 2024 RNA.

Beyond the specific transmission security reliability criteria violations identified in the 2024 RNA and recent STAR studies, the NYISO has also observed potential issues that indicate a less operable system as the reliability margins decrease. This is concerning because it means that NYISO operators will have utilized the tools in their toolbox, such as Emergency Operating Procedure (EOP) steps, more often since the “just right” system condition in planning is often more optimistic than typical conditions experienced by operators, such as the number of generators and transmission lines out of service. The EOP steps consist of those load control and capacity resource supplements that can be implemented before load must be

¹⁶ See Appendix E for further details on the non-linear correlation between zonal resource adequacy margins and statewide LOLE values.

disconnected due to capacity shortages. Load control measures include implementation of SCR and EDRP programs, public appeals to reduce demand, and voltage reduction. Capacity resource supplements could include emergency purchases and cutting operating reserves.¹⁷

To bridge this divide, the NYISO can apply metrics, such as **Expected Unserved Energy (EUE)** or **Loss of Load Hours (LOLH)**,¹⁸ to the probabilistic resource adequacy simulation results *before* EOPs are invoked. These metrics quantify reliability impacts under normal conditions and provide a more holistic view of system performance than just considering the LOLE after the use of all emergency procedures.

The figures below compare the statewide system margins to the baseline LOLE, LOLH, and EUE metrics at different stages – before the EOPs are employed, after SCRs are called (which is modeled as the first EOP step), and the final value after all EOP steps.

¹⁷ NYSRC Draft Policy 5-19– Procedure for Establishing New York Control Area Installed Capacity Requirements, issue on June 13, 2025

¹⁸ For more details, see NYSRC’s “Resource Adequacy Metrics and their Application,” which is available at: <https://www.nysrc.org/wp-content/uploads/2023/03/Resource-Adequacy-Metric-Report-Final-4-20-20206431.pdf>.

LOLE Metric Compared to Statewide Margin

LOLE is generally defined as the expected (weighted average) number of days in a given period (e.g., one study year) when for at least one hour from that day the hourly demand is projected to exceed the zonal resources (event day). By 2033, the first study year both winter and summer statewide system margins are negative, the pre-EOP LOLE has increased from approximately 2.6 to 7.6 event-days per year.

Figure 51: Comparison of LOLE and Statewide System Margin

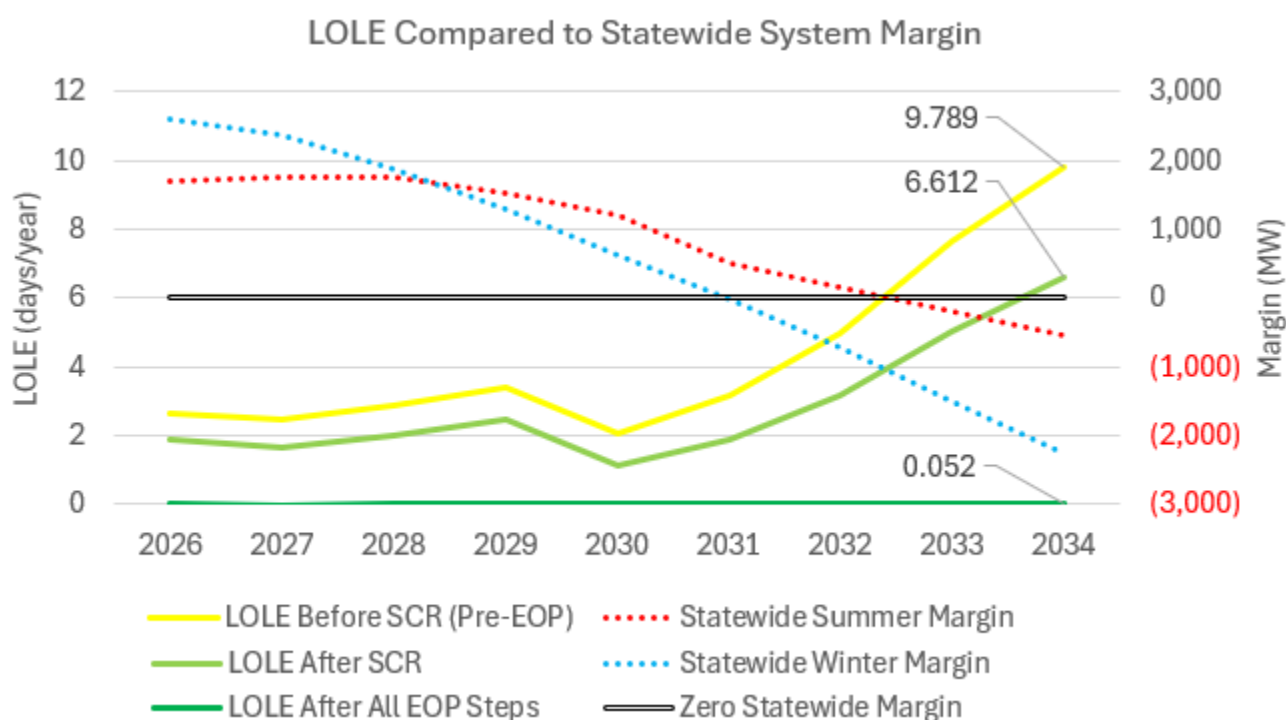


Figure 52: Statewide System Security Margin and LOLE results by study year

Statewide System Reliability Results	2026	2027	2028	2029	2030	2031	2032	2033	2034
System Security Margin (MW)									
Statewide Summer Margin	1,704	1,759	1,764	1,529	1,213	500	144	-206	-531
Statewide Winter Margin	2,607	2,382	1,862	1,302	633	-17	-727	-1,497	-2,257
NYCA LOLE (event-days/year)									
Pre EOP support	2.630	2.466	2.870	3.394	2.073	3.195	4.981	7.653	9.789
Special Case Resources (SCRs)	1.912	1.642	2.014	2.480	1.107	1.896	3.154	5.030	6.612
Manual Voltage Reduction	1.867	1.580	1.945	2.401	1.036	1.794	2.998	4.808	6.346
30-Minute Operating Reserve	0.759	0.806	1.139	1.503	0.568	1.037	1.810	3.025	4.268
Voluntary Load Curtailment	0.616	0.644	0.944	1.259	0.447	0.840	1.471	2.487	3.653
Public Appeals	0.546	0.609	0.905	1.212	0.421	0.794	1.401	2.371	3.518
5% Remote Controlled Vol. Reduction	0.396	0.432	0.692	0.927	0.285	0.570	1.006	1.733	2.757
Emergency Assistance (External)	0.066	0.038	0.041	0.046	0.046	0.075	0.085	0.105	0.167
Part of the 10-Minute Op. Reserve	0.015	0.007	0.009	0.010	0.008	0.019	0.024	0.029	0.052

LOLH Metric Compared to Statewide Margin

LOLH is generally defined as the expected number of hours per period (e.g., one study year) when a system's hourly demand is projected to exceed the zonal resources (event-hour). By 2033, the first study year both winter and summer statewide system margins are negative, the pre-EOP LOLH has increased from approximately 10 to 25 hours per year.

Figure 53: Comparison of LOLH and Statewide System Margin

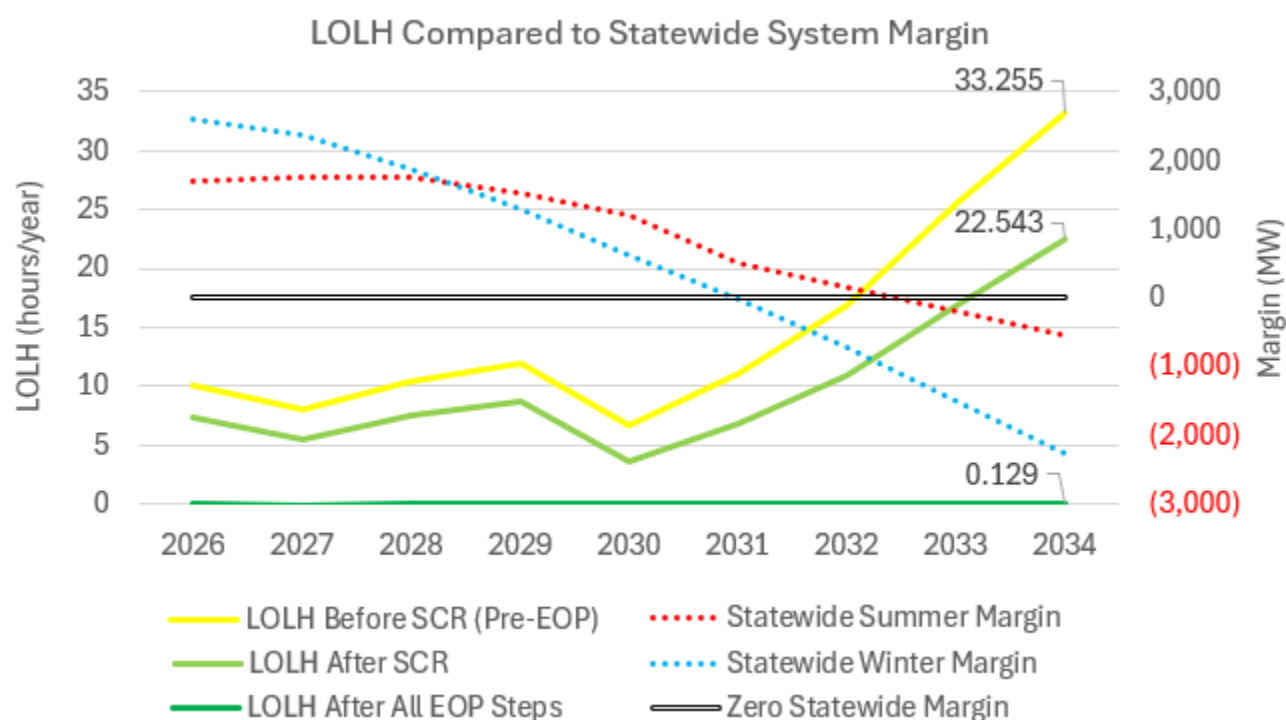


Figure 54: Statewide System Security Margin and LOLH results by study year

Statewide System Reliability Results	2026	2027	2028	2029	2030	2031	2032	2033	2034
System Security Margin (MW)									
Statewide Summer Margin	1,704	1,759	1,764	1,529	1,213	500	144	-206	-531
Statewide Winter Margin	2,607	2,382	1,862	1,302	633	-17	-727	-1,497	-2,257
NYCA LOLH (hours/year)									
Pre EOP support	10.013	8.087	10.413	12.012	6.684	11.144	16.851	25.607	33.255
Special Case Resources (SCRs)	7.365	5.432	7.458	8.766	3.665	6.770	10.844	16.881	22.543
Manual Voltage Reduction	7.173	5.221	7.199	8.462	3.436	6.409	10.313	16.100	21.600
30-Minute Operating Reserve	2.697	2.469	4.176	5.023	1.870	3.687	6.189	10.010	14.402
Voluntary Load Curtailment	2.105	1.933	3.462	4.148	1.452	2.983	5.037	8.277	12.376
Public Appeals	1.839	1.798	3.317	3.983	1.362	2.822	4.776	7.893	11.930
5% Remote Controlled Vol. Reduction	1.270	1.239	2.497	2.973	0.885	1.990	3.385	5.812	9.400
Emergency Assistance (External)	0.178	0.094	0.100	0.113	0.108	0.192	0.225	0.267	0.442
Part of the 10-Minute Op. Reserve	0.036	0.016	0.021	0.025	0.016	0.044	0.059	0.073	0.129

EUE Metric Compared to Statewide Margin

EUE is generally defined as the expected energy (MWh) per period (e.g., one study year) when the summation of the system's hourly demand is projected to exceed the zonal resources. By 2033, the first study year both winter and summer statewide system margins are negative, the pre-EOP EUE has increased from approximately 7,400 to 32,000 MW-hr per year.

Figure 55: Comparison of EUE and Statewide System Margin

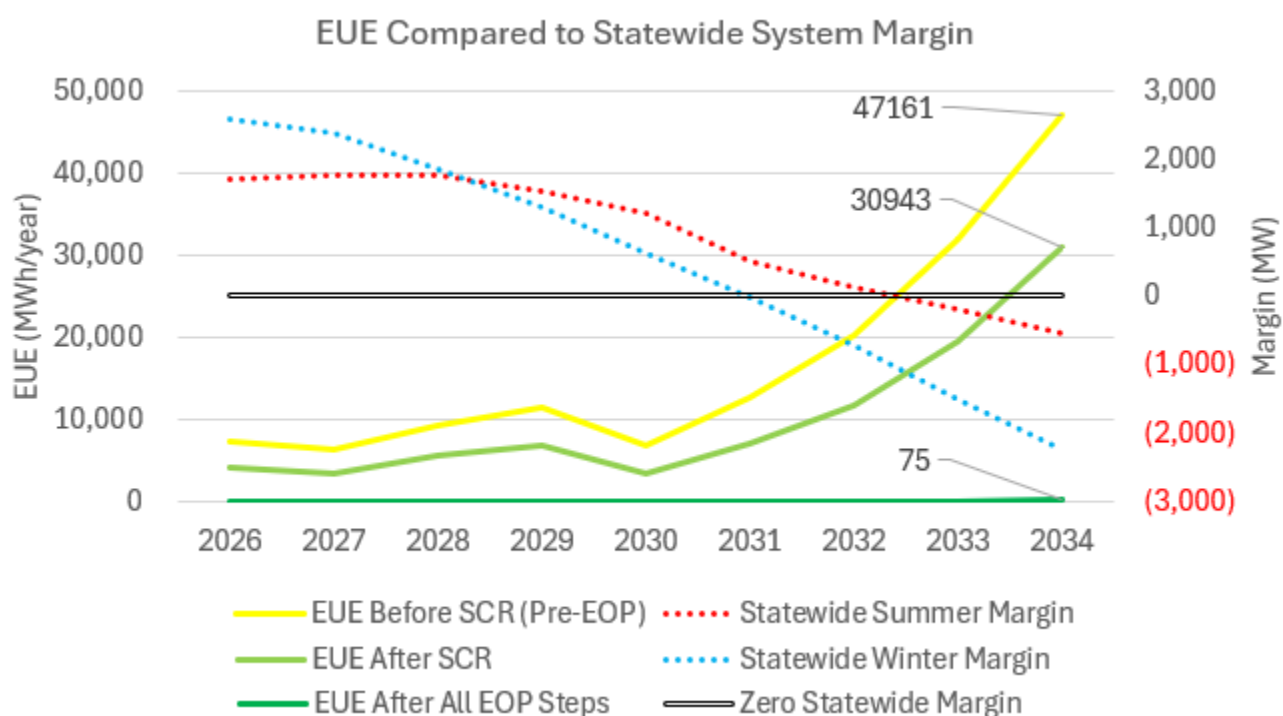


Figure 56: Statewide System Security Margin and EUE results by study year

Statewide System Reliability Results	2026	2027	2028	2029	2030	2031	2032	2033	2034
System Security Margin (MW)									
Statewide Summer Margin	1,704	1,759	1,764	1,529	1,213	500	144	-206	-531
Statewide Winter Margin	2,607	2,382	1,862	1,302	633	-17	-727	-1,497	-2,257
NYCA EUE (MWh/year)									
Pre EOP support	7,391	6,264	9,284	11,457	6,669	12,747	20,337	31,955	47,161
Special Case Resources (SCRs)	4,185	3,372	5,652	6,872	3,347	7,112	11,737	19,537	30,943
Manual Voltage Reduction	3,957	3,151	5,321	6,455	3,099	6,655	10,997	18,395	29,383
30-Minute Operating Reserve	1,652	1,631	3,376	4,064	1,583	3,727	6,244	10,882	18,910
Voluntary Load Curtailment	1,214	1,217	2,660	3,182	1,187	2,930	4,907	8,705	15,689
Public Appeals	1,089	1,153	2,593	3,099	1,102	2,751	4,620	8,253	15,008
5% Remote Controlled Vol. Reduction	656	723	1,788	2,095	675	1,826	3,074	5,754	11,069
Emergency Assistance (External)	56	31	31	38	45	104	132	164	287
Part of the 10-Minute Op. Reserve	8	4	5	7	6	22	32	43	75

The analysis shows a clear correlation that as statewide system margins decline (which is a good indicator of tight normal system conditions), pre-EOP LOLE/LOLH/EUE increase. This confirms that negative statewide system margins are reflected in higher resource adequacy risk. EOPs significantly reduce LOLE to within criterion, but reliance on them grows as conditions tighten. For example, in 2026, SCRs are activated and contribute to meeting 3.2 GWh of unserved energy. By 2034, SCRs are called much more often and contribute to meeting 16.2 GWh of unserved energy. The EUE and LOLH results indicate that operators would need to rely on Special Case Resources and emergency operating procedures, such as voltage reductions or reduced reserves, far more frequently in the future. By 2034, these measures are projected to be utilized for roughly three times as many hours and for about five times as much energy compared to 2026.

While this investigation evaluated the baseline resource adequacy model, the reliance on operator action, and therefore the pre-EOP LOLE/LOLH/EUE values, would be significantly higher when considering aging generation or higher demand forecast.

By evaluating resource adequacy through the lens of EUE or LOLH, the NYISO can identify scenarios where the system appears adequate but fails to meet reliability expectations without relying on emergency interventions. It also supports better alignment with operational realities and market participant expectations, ensuring that emergency tools remain reserved for true emergencies rather than routine reliability management.

Comprehensive System Voltage Support

An important aspect of reliability is control of power system voltage. In order for New York's grid to operate and transfer power across the state, voltages must be maintained within narrow limits. Voltages must be maintained within these limits in real-time, and the system must be operated such that any single failure on the system cannot cause a low or high voltage criteria violation. The requirement to respect voltage limits to avoid dangerous conditions can constrain the amount of power that may be moved across the state, also known as transfer capability.

In general, voltage control is provided by generators, switched reactive devices, and dynamic reactive devices. When operating, generators control voltage in their area in addition to generating power. Switched reactive devices, shunt reactors, and shunt capacitors can provide slow-acting, course control over voltage as they are switched on or off in large discrete blocks. Dynamic reactive devices, including static synchronous compensators (STATCOMs), static var compensators (SVCs), and synchronous condensers, can provide fine control over voltage and are fast acting with the ability to change their output to respond

to faults on the system.

High-load levels and highly loaded transmission lines tend to cause low voltages, while low-load levels and lightly loaded transmission lines tend to cause high voltages. Voltage control is a relatively local issue due to the fundamental physics of the power grid. While it is common for generators to supply power to customers over long distances, it is not possible for a generator or reactive device to control voltages over a wide area.

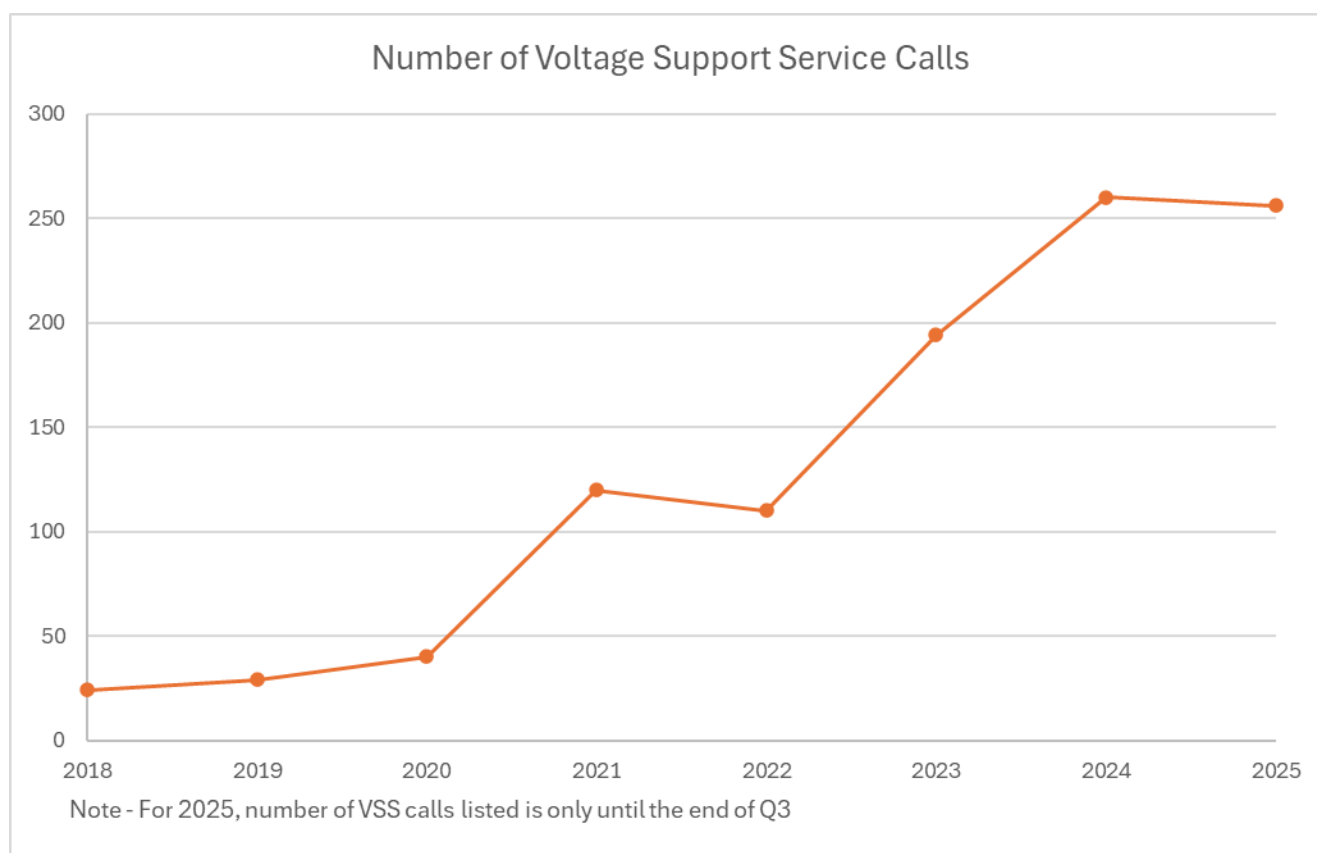
Insufficient control of voltage can lead to dangerous situations that may rapidly degrade into a blackout. While detailed investigation into the 2025 Iberian blackout is ongoing, initial public reports underscore the risks of inadequate voltage control as a factor, especially due to the high levels of inverter-based resources (IBRs).¹⁹ A NERC presentation at the June 26, 2025 FERC Open Meeting similarly noted that one primary contributing factor to the blackout was insufficient dynamic voltage regulation.²⁰

System voltage performance in New York is becoming increasingly difficult to maintain in real-time operations and in forward-looking planning studies. Figure 57 below shows that the number of calls for voltage support services has consistently grown over time. In the first three quarters of 2025, the number of calls is over ten times more than in all of 2018.

¹⁹ ENTSOE Page: <https://www.entsoe.eu/publications/blackout/28-april-2025-iberian-blackout/>.

²⁰ NERC Presentation: [NERC PowerPoint](#).

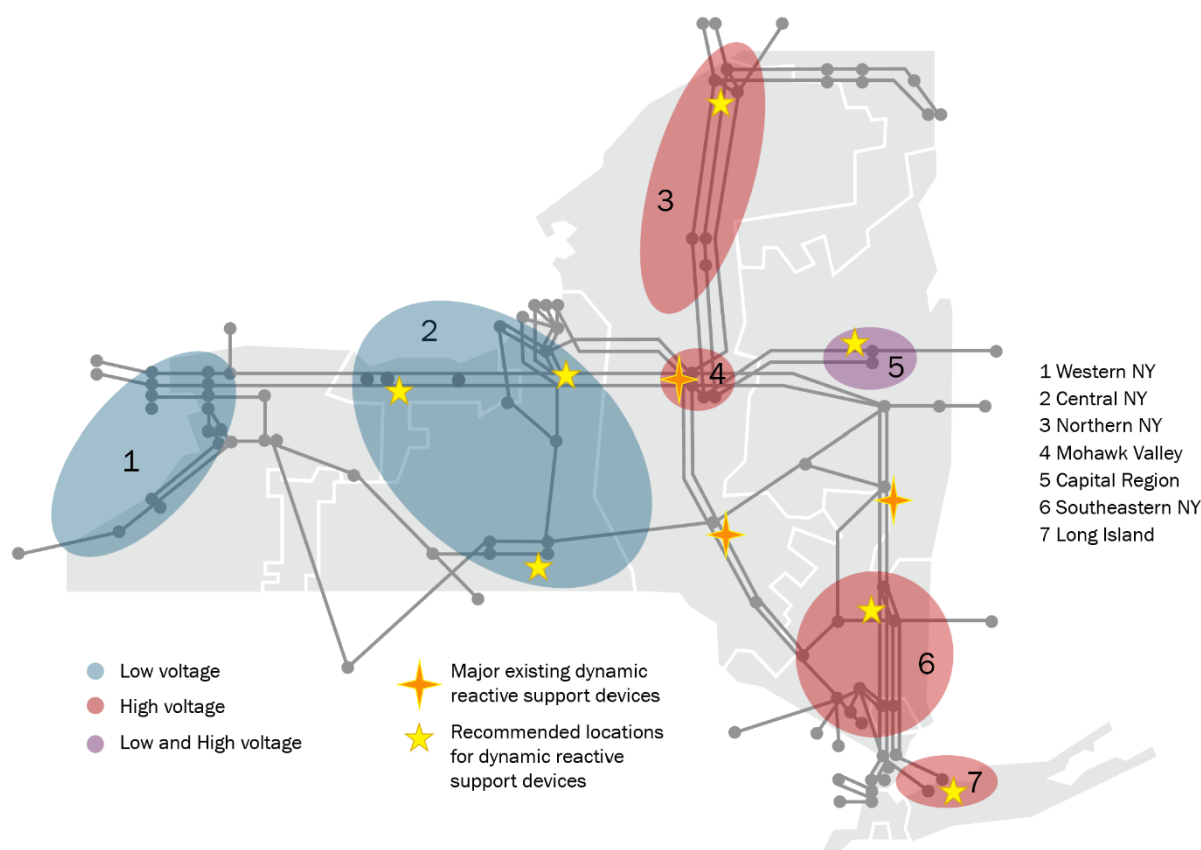
Figure 57: Number of Voltage Support Service Calls



As the flow patterns of the system change due to BTM solar adoption, new intermittent generation, and new transmission projects, operators are seeing new high voltage issues that require manual operator intervention. Furthermore, large load interconnections, generator retirements, and changes to neighboring systems could exacerbate voltage-limited transfer capability across the system.

The NYISO has identified common areas of concern for voltage control in both system planning and grid operations, illustrated in Figure 58 and explained in detail below. While the system is operated reliably, these areas of concern highlight the challenges that may limit economic dispatch of the system in real-time and may lead to criteria violations in future planning studies if trends continue. For each area of concern identified below, the CRP either recommends monitoring how the system evolves or identifies opportunities for “no regrets” voltage support investments. These recommendations serve as information to support proactive investment on the bulk and local systems and should not be interpreted as the NYISO identifying a transmission need due to an identified Reliability Criteria violation in the current cycle of the Reliability Planning Process.

Figure 58: Statewide Areas of Concern for Voltage Performance



Region 1 – Low voltages in Western NY

- In the Interconnection Studies for the ongoing Cluster Study, low voltages could occur when large quantities of energy storage in Zone A, around Niagara and down the shore of Lake Erie, are charging simultaneously.
- Recommendation: Continue to monitor the system conditions as new energy storage resources are coming into service. These issues will likely be seen in future real-time operations if a large portion of the energy storage projects in the Cluster Study are built and charging simultaneously.

Region 2 – Voltage transfer limitations in Central NY

- Low voltages could occur under summer peak conditions that limit voltage transfer ability in System Impact Studies of large load projects and other voltage transfer analysis. Limitations are driven by load interconnection projects that draw large amounts of real power from sourcing subsystems, leading to significant voltage drop across the interfaces. Large loads may fundamentally change the way power flows across the New York system compared to past behavior.
- Recommendation: Continue to monitor the system conditions as new large loads are coming into service. To maintain the ability to move power across the system reliably, voltage support is needed. Load interconnection processes may lead to construction of additional switched reactive devices in these areas. Strategically placed dynamic reactive devices could more

efficient solution than fragmented shunt devices and provide greater operability.

Region 3 - High voltages in Northern NY

- High voltage is a concern in this area in both operations and planning studies, particularly in light load conditions. Long transmission lines in this area tend to cause high voltages when lightly loaded, and flow patterns through this part of the system may change due to load growth or interchange with neighboring areas.
- Recommendation: Continue to monitor the system conditions as the system condition evolves.

Region 4 - High voltages in Mohawk Valley

- High voltages have been observed in this area under light load conditions in operations. High voltages persisted even after switched reactive devices were adjusted. Calls for voltage support from the existing dynamic reactive device in this location contribute to the increase seen in Figure 58 above.
- Recommendation: Add voltage support in this area, such as Edic 345 kV substation, to help mitigate issues currently observed.

Region 5 - High and low voltages in Capital Region

- The Capital Region shows both high and low voltage challenges depending on system conditions. Operators have seen issues in real time and Planning studies have had challenges under winter peak conditions.
- Recommendation: Add dynamic voltage support in this area, such as Gordon Road 345 kV substation, to help mitigate issues currently observed. As dynamic reactive devices typically have the ability to address both high and low voltages, unlike single switched reactive devices, a dynamic reactive device may be uniquely useful in this location.

Region 6 - High voltages in Southeastern NY

- High voltages have been observed in this area under light load conditions, both in operations and in planning studies. High voltages here are driven by the large number of transmission lines in the area that were built to be able to supply downstate loads under peak load conditions but that are left lightly loaded when downstate demand is low.
- Recommendation: Add dynamic voltage support in this area, such as Pleasant Valley 345 kV, to help mitigate issues currently observed. A dynamic reactive device in this area could help manage the high voltage problems under light load conditions while also supporting voltage when power flow from upstate to downstate is high. While low voltages in this area have not yet been a major constraint, the flexibility of a dynamic reactive device would offer a degree of future proofing for this important section of the New York grid.

Region 7 - High voltages in Long Island

- High voltages have been observed in western Long Island for daytime light load conditions. The main driver is low load, high levels of BTM solar and the resulting low commitment of synchronous generators that would normally be available to control voltages. Currently, when these high voltages occur, operators frequently have to switch transmission lines in and out of service to maintain voltages during these periods. Additionally, certain generators must run to provide voltage control even when they would not be needed

for supplying power to loads.

- Recommendation: Add dynamic voltage support in this area, such as East Garden City 345 kV, to help mitigate issues currently observed. A dynamic reactive device in this area could help manage the high voltage challenge while reducing the need for generators to run primarily for voltage control.

Dynamic reactive support devices, such as static synchronous compensators (STATCOMs) or static var compensators (SVCs), have inherent benefits compared to traditional capacitor or reactor shunt banks in their operating speed and ability to continuously control voltage across its operating range rather than in discrete, “lumpy” steps. A comprehensive planning approach for addressing voltage performance utilizing dynamic reactive devices would allow for effective voltage control solutions that (i) are sited at diverse locations; (ii) could control both high and low voltage issues; and (iii) require minimal operator interaction. Figure 58 shows existing major dynamic reactive support devices in New York and opportunities for the locations for future, “no regrets” dynamic reactive support devices.

The Role of Competitive Wholesale Markets

Competitive wholesale electricity markets have successfully facilitated efficiency gains on the grid by reducing fuel consumption and lowering consumer costs. Competitive wholesale electricity markets also shift the risk and cost consequences of resource investment and operational decisions from consumers to electricity suppliers. An added benefit of wholesale markets is that competition among resources rewards economic efficiency.

Wholesale markets are also designed to attract and retain enough supply in the most beneficial locations to provide needed reliability services. Within today's system there is a predominance of large-scale controllable resources that can be dispatched by operators to respond to system needs. The NYISO is taking numerous steps to ensure its markets continue to attract investment in resources that are controllable and can respond quickly to changing system conditions that will be necessary to balance the varying supply from wind and solar in the future.

How NYISO's Wholesale Electricity Markets Work

Each day, the NYISO conducts wholesale electricity auctions for market participants to buy and sell electricity. These auctions schedule sufficient electricity generation to match consumer demand, delivering reliable electricity with the least-cost mix of resources available to the grid.

These daily electricity auctions provide for minute-to-minute reliability, with market signals responding to changing conditions and continuously adjusting output levels of suppliers to match the instant needs of the grid.

For these daily auctions to function efficiently, operators need a longer-term view into what supply resources will be available to the grid. The NYISO achieves this certainty through its Installed Capacity (ICAP) market, which promotes reliability by compensating suppliers for committing to be available to the grid whenever needed. The NYISO conducts capacity market auctions on a seasonal and monthly basis to offer suppliers and developers transparent locational pricing signals that reward availability, performance, and the resource's contribution towards reliably serving load.

Taken together, competitive wholesale energy, ancillary services, and capacity markets are fundamental to providing consumers reliable, lowest-cost power and an essential tool for achieving public policy objectives. The NYISO is continuously working with its stakeholders to identify ways to refine and enhance its markets in response to policies and the changing resource mix.

Enhancing Wholesale Electricity Market Design

The NYISO's market design must provide proper incentives to new and existing resources that can respond to and follow dispatch signals in all types of conditions, harnessing competition to minimize consumer costs while maintaining reliable service and assisting with the achievement of policy goals. Further, with many conventional resources slated to retire due to emissions restrictions, markets will also be relied on to sufficiently incentivize investments in new technologies, which may include long-duration storage, hydrogen fueled generators, and other non-emitting, dispatchable technologies.

The NYISO has identified certain key market enhancements to maintain the alignment between emerging reliability needs and market incentives. The NYISO has and is continuing to work with stakeholders to address these market enhancements, which include the following projects in 2026:

DER Market Enhancements

Distributed Energy Resources (DER) are small generation facilities (20 MW and below) and load curtailment resources that may be aggregated together to participate in the wholesale markets and provide grid services using the DER participation model. The rules governing participation of DERs have just recently come into effect in New York, a first in the nation, and participation from resources have just begun. Large loads could leverage this model to provide grid services when it is economic to do so, which could reduce the need for additional generation resources to support large loads.

Further work with stakeholders to enhance the DER participation model continues. As more resources enter the DER participation model, additional enhancements and revisions have been identified for consideration. For example, the NYISO is examining revisions and enhancements to the model to provide DERs additional flexibility to better reflect their operating characteristics, such as receiving fixed schedules prior to the operating day.

Flexible Load Models – Large Loads

The operational flexibility of large Loads could represent a significant asset in enhancing system reliability. The NYISO's current Behind-the-Meter Net Generation (BTM:NG) Resource participation model allows generation that routinely serves a Host Load to offer any excess generation into the NYISO's wholesale markets. However, the BTM:NG Resource participation model is premised on a firm Host Load that is not easily controllable or responsive to market signals.

An expansion of the NYISO's BTM:NG Resource participation model to accommodate flexible Host Loads could enable these resources to contribute additional surplus supply to wholesale markets. Additionally, such an expansion could also consider a broader range of generation technologies permitted

to be included in the BTM:NG Resource participation model, including intermittent renewable energy and energy storage, providing additional flexibility to entities seeking to use such a model.

Competitive Power Markets Role in the Transition

Competitive electricity markets are fundamental to providing consumers reliable, lowest cost power and an essential platform for achieving public policy objectives. The NYISO is leading the way in meeting the challenges before us. The NYISO's leadership in developing innovative market design enhancements demonstrates our focus on innovation. The NYISO will continue to be actively engaged with stakeholders and policymakers on the path to a reliable, affordable, and lower emissions grid for New York.

Conclusions and Recommended Actions

New York's electric system faces an era of profound reliability challenges as resource retirements accelerate, economic development drives demand growth, and project delays undermine confidence in future supply. Additionally, 25% of the state's total generating capacity is fossil-fuel-based generation that has been in operation for more than 50 years. As these generators age, they are experiencing more frequent and longer outages.

While this 2025–2034 CRP, under current applicable reliability criteria and procedures, identifies no actionable Reliability Needs, this outcome should not be mistaken for long-term system adequacy. The margin for error is extremely narrow, and most plausible futures point to significant reliability shortfalls within the next ten years. Depending on demand growth and retirement patterns, the system may need several thousand megawatts of new dispatchable generation over that timeframe.

The reliability challenges outlined in this CRP require a shift from incremental adjustments to a comprehensive, forward-looking planning approach. Tight margins and compounding risks mean that traditional methods built around a single expected future are no longer sufficient. To maintain system reliability and protect public safety, economic activity, and quality of life, the NYISO recommends actions that strengthen planning across a broad spectrum of plausible outcomes, improve energy adequacy metrics, and accelerate solutions for resource and voltage performance. These recommendations are designed to move the grid from a reactive posture to a proactive framework that anticipates risk and enables timely investment before reliability margins disappear.

- **Take action to account for a wider range of plausible outcomes in reliability planning.** This CRP shows that key factors that affect the New York transmission system, either by itself or combined with others, will have consequential impacts to reliability that current planning methods do not fully capture. Today's approach assumes a single expected future, but the analysis shows that this is no longer sufficient. NYISO must evolve its methodology so that Reliability Needs are identified earlier and more accurately under a broader range of conditions, enabling timely solutions that the NYISO needs to be able to plan for through the identification of solutions. Specifically, the NYISO recommends adopting the following scenario planning concepts into the formal procedures for determining actionable Reliability Needs:
 - evaluate a wider range of plausible emerging risks (e.g., possible delays to planned projects, reduced imports, etc.), rather than relying solely on a deterministic base case;
 - incorporate the probability of aging generation or catastrophic failures, recognizing that these risks grow significantly over time; and
 - use a range of plausible demand forecasts, accounting for economic trends, electrification, demand-side policy adoption, and technology-driven behavior changes.

- **Strengthen reliability planning beyond emergency measures.** Operational experience from the June and July 2025 heatwaves revealed how quickly tight resource margins and limited system flexibility can lead to stressed conditions, even when overall resource adequacy appears sufficient. Current criteria measure resource adequacy only after assuming the full utilization of emergency operating procedures, effectively planning for operators to rely on extraordinary measures as routine practice. This approach leaves fewer tools available when real-time conditions deteriorate. Recent focus in New York and the wider industry recognizes that more consideration is needed for non-peak hours given the changing resource mix and load profiles. The NYISO recommends that additional metrics, such as expected unserved energy (EUE), be utilized to determine statewide reliability with consideration of normal operating conditions, ensuring planning reflects the true resilience of the system rather than its dependence on emergency actions.
- **Structure a multifaceted approach to address resource shortfalls.** This CRP identifies scenarios where statewide deficiencies could exceed 4,000 MW by the early 2030s, driven by demand growth and retirements of aging generation. Historically, regulated solutions have focused on transmission, but future reliability needs will increasingly require new or repowered generation resources—in addition to wires. NYISO's role is to signal reliability risks early, enable the interconnection of supply-side solutions, and work with stakeholders to ensure market mechanisms and regulated backstop options can deliver timely solutions. However, many barriers lie outside NYISO's control, including permitting timelines, siting restrictions, supply chain constraints, and financing hurdles that slow resource development. These challenges underscore the need for policy alignment and streamlined approvals to complement NYISO's ongoing planning and market efforts.
- **Deploy a comprehensive strategy to address system voltage performance.** For years, the New York transmission system was designed around expected flow patterns—predominantly west to east and north to south. With the rise of distributed energy resource (DER) growth and new investments in transmission, these flow patterns have become less predictable and, therefore, making voltage control more challenging. Planning studies now show the growing need for voltage support, especially with more renewable integration, large data centers, and higher demand growth upstate. This CRP recommends the development of a system-wide plan for dynamic voltage control devices, which would be more efficient and flexible than addressing each issue with separate upgrades.

Given the confluence of factors that the system faces, enhancements to the NYISO's reliability planning processes are essential and must be undertaken now. The NYISO will discuss the recommendations listed above with stakeholders prior to the start of the 2026 cycle of the Reliability Planning Process. To the extent applicable, some recommendations may require changes to the Reliability Planning Process Manual, the Open Access Transmission Tariff, and coordination with the New York State agencies and the New York State Reliability Council.