NYISO / PJM JOA Updates

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Market Implementation Committee
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Background

- In September of 2018, the NYISO and PJM filed a joint waiver with FERC in order to be able to coordinate on the East Towanda – Hillside 230 kV Tie-Line
  - Certain provisions of the JOA in conjunction with provisions in the PJM Tariff were not allowing for this facility to be added as a flowgate
- Per FERC’s approval of the waiver, the NYISO and PJM are working through the necessary JOA revisions to ensure that coordination can continue without the need for a waiver
- In addition, the NYISO and PJM agreed to evaluate the current M2M Entitlement process and implement changes to simplify the process

Note: JOA revisions are not required to be approved by PJM Stakeholders; however, PJM is looking for and open to feedback
Overview of Changes

• Major Topics
  – New Flowgate Type (Other Coordinated Flowgate)
    • To address the concerns raised in the East Towanda – Hillside waiver
  – M2M Entitlement Calculation Changes
    • To simplify the entitlement process

• Minor Topics
  – Data Confidentiality
    • Added additional detail regarding data sharing between NYISO & PJM Transmission Owners
  – Constraint Relaxation
    • Clarified existing language
  – Stuck Breaker Handling
    • Added a PAR Coordination Suspension provision for stuck breakers
Other Coordinated Flowgate

The NYISO & PJM mutually agreed to add a new flowgate type, Other Coordinated Flowgate in addition to the current M2M Redispatch Flowgate and NY-NJ PAR Coordinated Flowgates

– Other Coordinated Flowgate is a flowgate where constraints are jointly monitored and coordinated on for reliability purposes but are not settled on due to a lack of impactful dispatchable generation on the Non-Monitoring RTO’s System

– The addition of this flowgate required updates to the qualification criteria for M2M Redispatch Flowgates:
  • An Other Coordinated Flowgate is eligible for coordination if any resource has a significant impact on the facility
  • A M2M Redispatch Flowgate is eligible for coordination if a dispatchable resource, as defined in the JOA, has a significant impact on the facility
M2M Entitlement Changes

• Calculate M2M Entitlements* for each active flowgate annually using the most recently completed 3 calendar years (Most recent year: 20%, Middle Year: 30% & Oldest Year: 50%)
  – Ensures impact of upgrades on both parties’ systems are incorporated into the calculation
    • This change allowed for the removal of Section 6.3 and 6.4
• Entitlements will be calculated for Period/Group Pairings
  – 12 Periods representing each month of the year
  – 4 Groups: HB0 – HB5; HB9 – HB14; HB15 – HB20; HB6 – HB8 & HB21 – HB23
• Provisions were added to address adjusting the entitlement calculation for certain upgrade scenarios
• Provisions were added to address negative M2M Entitlement scenarios

*M2M Entitlement Calculations are only relevant for M2M Redispatch Flowgates
35.2.1 Abbreviations, Acronyms, Definitions

35.7.1.9 Additional information required for the parties to administer the M2M coordination process set forth in Schedule D to this agreement

35.7.2 Confidentiality

35.12.1 M2M Coordination Processes
### 35.23 Schedule D M2M Coordination Process

<table>
<thead>
<tr>
<th>Section</th>
<th>Updates due to the addition of Other Coordinated Flowgates</th>
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</thead>
<tbody>
<tr>
<td>Section 1</td>
<td>Updates due to the addition of Other Coordinated Flowgates</td>
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<tr>
<td>Section 2</td>
<td>Updates due to the addition of Other Coordinated Flowgates</td>
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<td>Section 3</td>
<td>Updates due to the addition of Other Coordinated Flowgates</td>
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<td>Section 4</td>
<td>Updates due to the addition of Other Coordinated Flowgates</td>
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<td>Updates due to the addition of Other Coordinated Flowgates</td>
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<tr>
<td>Section 6, 6.1, 6.2, 6.3*, 6.4*</td>
<td>Updates due to the addition of Other Coordinated Flowgates &amp; M2M Entitlement changes</td>
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<td>Section 7, 7.1, 7.2</td>
<td>Updates due to the addition of Other Coordinated Flowgates</td>
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<tr>
<td>Section 8, 8.1, 8.2, 8.3, 8.4</td>
<td>Updates due to the addition of Other Coordinated Flowgates &amp; M2M Entitlement changes</td>
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<tr>
<td>Section 9</td>
<td>Constraint Relaxation</td>
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<tr>
<td>Section 10.1.10</td>
<td>Stuck PAR Coordination Suspension Provision</td>
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</tbody>
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* Indicates Sections were deleted
Next Steps

• NYISO Stakeholder Communications: May 20th, June 4th

• Tentative FERC filing Date: June 30th

Note: A full redline of JOA changes are posted with the meeting material
## Appendix: M2M Entitlement Changes Table

<table>
<thead>
<tr>
<th>Entitlement Category</th>
<th>Current</th>
<th>New</th>
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</thead>
<tbody>
<tr>
<td>Frequency</td>
<td>Once Time</td>
<td>Annually</td>
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<tr>
<td>Time Frame</td>
<td>2009-2011</td>
<td>Most recent 3 completed calendar years</td>
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<td>Weighting</td>
<td>Equally (33.3%)</td>
<td>Most recent year: 20%, Middle Year: 30% &amp; Oldest Year: 50%</td>
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<tr>
<td>Granularity</td>
<td>Season/Day of Week/Hour</td>
<td>Period/Group</td>
</tr>
<tr>
<td>Direction</td>
<td>Positive</td>
<td>Positive &amp; Negative</td>
</tr>
<tr>
<td>Upgrades</td>
<td>Explicit Stand-Alone Calculation</td>
<td>Implicit via the annual calculation</td>
</tr>
</tbody>
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