

Comprehensive Transmission Planning

Introduction

Thank you for your participation in the Comprehensive Transmission Planning (CTP) survey. The following survey seeks your input on topics related to the development of the integrated transmission planning process. This includes steps from evaluating large loads through a Batch process to developing an actionable transmission plan.

This survey includes initial ideas and suggestions to incorporate into the design of this process. Every question also includes a free-text response option; we welcome all input and ideas. Results will not be individually attributed, and we welcome your candid feedback.

Always make sure you have answered all the questions provided. When you are ready to move on to the next page, click the “Next >>” button located at the bottom of the page. Do not use your browser buttons to go from one page to another.

If you have any questions about this survey, please contact Matt Mereness at matt.mereness@ercot.com.

Comprehensive Transmission Planning

Screeners

What is your name?

What is your work email address?

Which organization do you represent?

As a reminder, we are looking for one response per organization. Before proceeding, please make sure you have consolidated your response(s) on behalf of your entire organization and only provide one submission.

Which category does your organization most closely belong to?

- ☐ Co-locators
- ☐ Consumers (Residential/Commercial)
- ☐ Cooperatives (Co-ops)
- ☐ Developers
- ☐ Hyperscalers
- ☐ Independent Generators
- ☐ Independent Power Marketers
- ☐ Independent Retail Electric Providers (REPs)
- ☐ Industrial Customer
- ☐ Investor-Owned Utilities (IOUs)
- ☐ Municipals
- ☐ Research Organizations
- ☐ Other (please specify)

Does your organization directly participate in transmission planning activities in the ERCOT region?

- ☐ No
- ☐ Yes, please specify how your organization participates in transmission planning activities.

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About this Survey

This survey is organized into 3 sections.

Section 1 covers the batch process

Section 2 covers modeling and case building

Section 3 covers reliability studies and the development of the actionable transmission plan

For each question, please select the choice that best represents your view. The multiple-choice options represent potential solutions and ideas for your consideration; you may also select the free-text response box for each question if you have other ideas or suggestions.

Recommended focus: ERCOT recommends that TSPs respond to all sections. For other stakeholders, ERCOT recommends responses to section 1 at minimum, but welcomes participation in the full survey.

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SECTION 1: BATCH PROCESSES

The following question is dependent on policy decisions. Options presented are for stakeholder input purposes and do not presuppose a policy outcome.

Q1| Which entity should select a load's Point of Interconnection?

- ☐ DSP
- ☐ TSP
- ☐ ERCOT
- ☐ ILLE
- ☐ No opinion

Other, please specify. Or include any additional comments

Q2| After a TSP signs an Intermediate Agreement with a Large Load, how long should it take for the TSP to submit to ERCOT the POI and modeling information (steady state only)?

Q3| What pre-Batch feasibility screens, if any, should TSPs run before loads qualify for a Batch study? Please select all that apply.

- ☐ Point of Interconnection Identification - Identify the point of interconnection for the load
- ☐ Minimum Interconnection Identification - Identify minimum interconnection facilities
- ☐ Required Local Screening Study - Identify potential local transmission and physical system limitations
- ☐ Optional Local Screening Study - Identify potential local transmission and physical system limitations
- ☐ None - TSPs do not conduct pre-screening and pass through submitted applications
- ☐ No opinion

Other, please specify. Or include any additional comments.

Q4| When should pre-Batch feasibility screen be completed?

- ☐ Prior to Batch application by TSPs
- ☐ After Batch application and prior to Batch study by TSPs

Other, please specify. Or include any additional comments.

Q5| ERCOT is considering the following features for the proposed load interconnection and registration platform:

- Application tracking: Ability to track status of an application against defined requirements and milestones (with visibility for interconnecting load, ERCOT, and TSP(s))
- Timeline visibility: Ability to see expected/committed timelines for each stage of the application review
- Document upload and sharing: Ability to upload and share supporting documentation (e.g., drawings, evidence of financial security)

Are there any other features you would like to be considered in the first release of the platform?

Q5a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q6| ERCOT is proposing that ILLEs with unfulfilled ramp may request re-study under their original Large Load Batch (LLB) tracking number. Do you agree with ERCOT's proposed approach to studying unfulfilled Large Load ramp requests from a previous Batch study in a future Batch study as presented on [slide 31 of the August 31 CTP workshop](#)?

- ☐ Yes
- ☐ No (see below)
- ☐ No opinion

If No, please share your alternative proposal. Or provide any additional comments.

Q7| ERCOT is proposing for large load projects that did not commit in prior Batch, that they may request inclusion in subsequent Batch studies, provided they (i) formally request it and (ii) pay a new study fee. The ILLE’s financial security, intermediate agreement, LL tracking number, and all portal information would carry forward to the new Batch study. Do you agree with ERCOT’s proposed treatment of non-committed Large Loads as presented on slide 32 of the August 31 CTP workshop?

- ☐ Yes
- ☐ No (see below)
- ☐ No opinion

If No, please share your alternative proposal. Or provide any additional comments.

Q8| ERCOT is proposing to allow large loads that received a tracking number, but were excluded from Batch Zero, to request inclusion in Batch One. ERCOT will waive the subsequent Batch fee if the interconnecting TSP/DSP attests that the ILLE has already paid at least \$100k in study fees for the project. The ILLE must meet all other Batch One study requirements. Do you agree with ERCOT’s proposed treatment of Large Loads excluded from Batch Zero as presented on slide 33 of the August 31 CTP workshop?

- ☐ Yes
- ☐ No (see below)
- ☐ No opinion

If No, please share your alternative proposal. Or provide any additional comments.

The next two questions refer to the prioritization of Batch BYOG improvements presented on the August 31st workshop (see pages 34 and 35 of the August 31 CTP Workshop deck). In these questions, we ask that you select the four highest-priority enhancements – first in the near term, followed by the long term.

* Q9| Please select the four highest priority BYOG enhancements that you would like ERCOT to work on in the NEAR TERM (i.e., for Batch 1)

- ☐ WLPUN opt-out option during Commitment: Allow a Large Load with WLPUN to elect to be a standalone Large Load if the batch study results in full withdrawal capability for the load; i.e., cancel the GINR project without losing the load allocation
- ☐ WLPUN exit plan: Define how a WLPUN can transition to different registration upon completion of energization of planned facilities (load, generation, and transmission upgrades as applicable).
- ☐ WLPUN generation additions: Define how to add more generation to an existing/planned WLPUN site.
- ☐ WLPUN on-ramp for existing Large Load: Define how to add generation to an existing/planned standalone Large Load so that it becomes a WLPUN
- ☐ WLPUN Dynamic Limits: Define how WLPUN withdrawal limits could change from static to dynamic values in real-time.
- ☐ Large load self-supply outside of Batch: Allow a Large Load with generation to connect before going through the batch if the load ensures that it will not consume from the grid until after it goes through a batch process, i.e., use the GINR process.
- ☐ WLPUN with Settlement Only Generation: Allow a WLPUN to use Settlement Only generation
- ☐ Large load island transition to grid-connected: Define process for islanded configurations to become grid-connected
- ☐ BYOG at different location: Develop BYOG option for generation at a different location from the Large Load (if selected, provide comment on extent of "different location", such as one station away, or beyond)
- ☐ Define and allow Self-Limiting Facility (SLF) Private Use Networks (PUN): Combine SLF and PUN concepts
- ☐ Pursue BYOG option of Netted Network: Consider in the planning process how Netted Network concept discussed at Aug 21 LLWG would impact allocations if adopted in Operations.
- ☐ Allow Multiple POIs and/or Customer-owned Substations (if selected, provide comment on extent of multiple-POIs)
- ☐ Allow mix of resources at PUN: Allow a mix of different resource registration categories at a PUN, i.e., Generation Resources AND Settlement Only
- ☐ Allow temporary generation: Allow temporary generation until the transmission is built to reliably serve the Large Load. Generation is planned from the beginning to be temporary without having to go through the RMR process
- ☐ Define operational battery registration: Define battery registration for batteries that are only used for meeting operational requirements, e.g., voltage ride-through
- ☐ Develop rules for market-operating operational batteries: Define rules for batteries that are added for operational requirements, and want to participate in the market
- ☐ Develop rules for using an interconnected battery as part of PCLR
- ☐ No opinion

Additional Comments

* Q10| Please select the four highest priority BYOG enhancements that you would like ERCOT to work on in the LONGER TERM (i.e., post Batch 1)

- ☐ WLPUN opt-out option during Commitment: Allow a Large Load with WLPUN to elect to be a standalone Large Load if the batch study results in full withdrawal capability for the load; i.e., cancel the GINR project without losing the load allocation
- ☐ WLPUN exit plan: Define how a WLPUN can transition to different registration upon completion of energization of planned facilities (load, generation, and transmission upgrades as applicable).
- ☐ WLPUN generation additions: Define how to add more generation to an existing/planned WLPUN site.
- ☐ WLPUN on-ramp for existing Large Load: Define how to add generation to an existing/planned standalone Large Load so that it becomes a WLPUN
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- ☐ BYOG at different location: Develop BYOG option for generation at a different location from the Large Load (if selected, provide comment on extent of "different location", such as one station away, or beyond)
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- ☐ Define operational battery registration: Define battery registration for batteries that are only used for meeting operational requirements, e.g., voltage ride-through
- ☐ Develop rules for market-operating operational batteries: Define rules for batteries that are added for operational requirements, and want to participate in the market
- ☐ Develop rules for using an interconnected battery as part of PCLR
- ☐ No opinion

Additional Comments

Q11| Should study requirements (study years) be prescribed in the Planning Guide, or allowed to be provided by ERCOT in the scoping document based on future risks and system attributes at the time of study?

- ☐ Prescribed in Planning Guide
- ☐ Provided in scoping document
- ☐ No opinion

Other, please specify. Or include any additional comments.

Q12| Which years should ERCOT study (i.e., identify transmission projects) in Batch study? As a point of reference, Batch Zero studies Y2, Y4, and Y6 (three years). End-to-end time to execute the Batch study (and the overall CTP process) will take longer if more years are studied.

- ☐ Y2, Y3, Y4, Y5, and Y6 (in a 2028 CTP, this would be 2030-2034) - more studies, slower batch process
- ☐ Y2, Y5, Y6 fewer studies, faster batch process
- ☐ No opinion

Other, please specify. Or include any additional comments.

The following questions on medium loads are dependent on policy decisions. Options presented are for stakeholder input purposes and do not presuppose a policy outcome.

Q13a| Irrespective of current definitions, what do you think the minimum threshold for a large load should be?

- ☐ 50 MW
- ☐ 75 MW, as set out in current statute
- ☐ 100 MW
- ☐ No opinion

Other, please specify. Or provide additional comments.

Q13b| Taking the previous response as the maximum threshold for a medium load, what do you think the minimum threshold for a medium load should be?

- ☐ 10 MW
- ☐ 25 MW
- ☐ 50 MW
- ☐ No opinion

Other, please specify. Or provide additional comments.

Q14| ERCOT historically obtained medium load data through RFIs. To standardize the process in the future, what evidence, disclosures, and/or securities should medium loads provide to TSPs to be eligible for inclusion in CTP?

- ☐ Site control evidence
- ☐ Disclosure of substantially similar interconnection requests
- ☐ Site-related technical and engineering studies
- ☐ State and local regulatory approvals
- ☐ Energization schedule
- ☐ Disclosure of backup generating facilities
- ☐ Evidence of power supply
- ☐ Disclosure of whether load can be modeled as a controllable load
- ☐ Study fee
- ☐ Evidence of financial security on a dollar per MW basis
- ☐ Evidence of financial security for equipment and services
- ☐ No opinion

If Other, please specify. Or provide any additional comments

Q14a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q15| How should information about medium loads be collected?

- ☐ Included by TSPs during case-building process
- ☐ Periodic RFIs
- ☐ Planning model change request - e.g., as Network Model Management System (NMMS) update
- ☐ Medium load portal (similar to large load portal)
- ☐ No opinion

Other, please specify. Or provide any additional comments.

Q15a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q16| What type of load interconnection requests (if any) merit an exception to be processed outside of the CTP cycle?

Q16a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q17| How much time should TSPs be given to identify preliminary steady state solutions and complete a feasibility review (excluding cost estimates) for preliminary solutions during the Batch study?

- ☐ 30 days for preliminary project identification, ongoing project feasibility assessments
- ☐ 45 days for preliminary project identification, ongoing project feasibility assessments
- ☐ 60 days for preliminary project identification, ongoing project feasibility assessments
- ☐ No opinion

Other, please specify. Or provide any additional comments.

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SECTION 2: MODELING AND CASE BUILDING

Q18| Should ERCOT consolidate the SSWG and RTP processes into a single case-building process?

- ☐ Yes, full consolidation: Replace SSWG and RTP processes with single CTP case-building process
- ☐ No, maintain separate case-building processes (please specify)
- ☐ No opinion

Other, please specify. Or provide any additional comments.

Q19| If ERCOT produces the following cases, are there additional essential cases that you would need for planning purposes? If so, why?

- Y2 summer peak
- Y2 no solar
- Y3 high renewable minimum load
- Y3 regular minimum load
- Y3 summer peak
- Y5 summer peak
- Y5 no solar
- Y6 summer peak

Q20| Should ERCOT transition to leading large load modeling into the network operations model (similar to GINR process) to ensure consistent applications of assumptions?

- ☐ Strongly agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly disagree
- ☐ No opinion

Please provide any additional comments

Q20a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q21| For cases that are not listed above, do you agree with ERCOT publishing a minimal core set (e.g., cases listed in Q19) plus raw network-data packages (unsolved cases), so entities can self-serve and build additional cases as needed? This allows ERCOT and TSPs to avoid being overburdened by various combinations of solved cases.

- ☐ Strongly agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly disagree
- ☐ No opinion

Additional comments

Q21a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q22| Should ERCOT consolidate short circuit case building into the steady state case building processes?

- ☐ Yes, full consolidation: Produce short circuit cases with the steady state cases into a single case-building process
- ☐ No, maintain separate case-building processes
- ☐ No opinion

Other, please specify. Or provide any additional comments.

Q23| Should ERCOT produce short circuit cases that match the core set of cases listed in Q19?

- ☐ Yes, short circuit cases should match the cases listed in Q19
- ☐ No (see below)
- ☐ No opinion

If No, please specify additional/modified/removed cases. Or provide any additional comments.

Q24| ERCOT will create a CTP case with updated topology, generator, and load forecasts at least annually. Would an annual CTP case re-build be sufficient?

- ☐ Yes
- ☐ No (see below)
- ☐ No opinion

If No, please specify the intended frequency of re-builds. Or provide any additional comments.

SECTION 3: RELIABILITY STUDIES

This question is dependent on policy decisions. Options presented are for stakeholder input purposes and do not presuppose a policy outcome. This section refers to current RPG project tiers as defined in the RPG charter.

Q25| Because projects associated with reliability and large loads will be processed through the CTP, ERCOT is considering escalating some projects for project alternative testing and public comment (as RPG does today). This process would run in parallel with CTP. In your view, would this be an acceptable way to test reliability and large load projects?

- ☐ Strongly agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly disagree
- ☐ No opinion

Additional Comments

Q26| What projects, other than projects associated with reliability and large loads, should be included in the project alternative testing process described above?

Q27| Would you agree with expanding tier 3 and 4 criteria to include more in-kind, aging infrastructure, and storm-hardening projects? (e.g., by changing cost thresholds)

- ☐ Strongly agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly disagree
- ☐ No opinion

Additional Comments

Q27a| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q28| What other projects, if any, should be considered through the legacy RPG process?

Q29| Should more local projects (i.e., projects entirely within one TSP's jurisdiction) be studied as Tier 3 and 4 projects? If so, how would you want to modify the tiering criteria?

This question is dependent on policy decisions. Options presented are for stakeholder input purposes and do not presuppose a policy outcome.

Q30| As part of the introduction of CTP, do you believe that ERCOT should revisit the project tiering framework?

- ☐ Yes
- ☐ No

Q30a| If yes, on what basis should project tiers be defined?

- ☐ Cost thresholds only and new ROW, as today
- ☐ Voltage level (e.g., 138 kV and below treated as local)
- ☐ Regional versus interregional system impact
- ☐ No changes
- ☐ No opinion

Other, please specify. Or provide any additional comments

Q30b| Would you consider this to be a:

- ☐ Near-term issue to be resolved imminently
- ☐ Longer-term issue to be resolved eventually

Q31| Would there be value to establishing planner-to-planner (ERCOT and TSP) sessions to review preliminary solutions on an ongoing basis?

- ☐ Yes, establish planner-to-planner sessions
- ☐ No (see below)
- ☐ No opinion
- ☐ If No, please explain. Or provide any additional comments

Q32| How much time should TSPs be given to identify preliminary solutions and complete a feasibility review for preliminary solutions during the Reliability study?

- ☐ 30 days for preliminary project identification, ongoing project feasibility assessments
- ☐ 45 days for preliminary project identification, ongoing project feasibility assessments
- ☐ 60 days for preliminary project identification, ongoing project feasibility assessments
- ☐ No opinion

Other, please specify. Or provide any additional comments.

Q33| How should TSP feedback be structured during the Reliability study to finalize solutions?

- ☐ Recurring 1 week working windows on defined questions with fixed topics per window
- ☐ Recurring 2 week working windows on defined questions with fixed topics per window
- ☐ Recurring 4 week working windows on defined questions with fixed topics per window
- ☐ Continuous/rolling engagement, with no fixed windows or defined topic scope
- ☐ Milestone-based engagement, with TSP input solicited only at key checkpoints rather than on a recurring cadence
- ☐ No opinion

Other, please specify. Or provide any additional comments.

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OTHER

Q34| NPPRR1267 establishes a monthly aggregated Large Load report to improve transparency. The report includes the data elements listed below, with protections to prevent disclosure of confidential information when aggregation levels are not adequate to maintain anonymity:

- Load zone
- TSP
- Load type (as provided to the TSP, such as refinery, steel mill, data center, etc.)
- Calendar quarter and year in which the interconnecting TSP submitted the project to ERCOT
- Requested energization quarter and year
- Size range
- Interconnection status (as defined by ERCOT to differentiate between operational, approved, under study, etc.)
- Co-location status

Please list any reporting elements you would like added or modified.

Q35| Do you have any suggestions on how to better incorporate feedback from operations into planning processes?

Q36| Is there anything else you would like to share about the overall process redesign?