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| PGRR Number | [116](https://www.ercot.com/mktrules/issues/PGRR116) | PGRR Title | Related to NPRR1240, Access to Transmission Planning Information |
| Date Posted | | July 2, 2024 | |
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| Requested Resolution | | Normal | |
| Planning Guide Sections Requiring Revision | | 3.1.1.1, Long-Term System Assessment  4.1, Introduction  7.1, Planning Data and Information | |
| Related Documents Requiring Revision/Related Revision Requests | | Nodal Protocol Revision Request (NPRR) 1240, Access to Transmission Planning Information  Nodal Operating Guide Revision Request (NOGRR) 267, Related to NPRR1240, Access to Transmission Planning Information | |
| Revision Description | | This Planning Guide Revision Request (PGRR) updates Planning Guide language to reflect the current practice of posting versions of the ERCOT Long-Term System Assessment (LTSA) and correspondingly updates the chart of data sets and designated classifications in paragraph (2) of Section 7.1, Planning Data and Information.  The PGRR moves from the Market Information System (MIS) Secure Area to the public ERCOT website Transmission Service Provider (TSP) Annual Planning Criteria and correspondingly updates the chart of data sets and designated classifications in paragraph (2) of Section 7.1. The Planning Guide does not designate the criteria to be Protected Information such as to be posted in the section of the MIS Secure Area that is Certified for TSPs Only, and the Guide instead requires the criteria to be posted in the MIS Secure Area that is available to all Market Participants who register and request a Digital Certificate to access the MIS Secure Area. ERCOT Staff analyzed past TSP criteria submissions, along with existing Protocols for posting requirements, and identified no ongoing basis for holding in the MIS Secure Area submissions that contain only criteria for a market audience and not ECEII. Section 4.1, Introduction, requires TSPs to submit criteria if they use their own criteria in addition to the Planning Guide, and ERCOT has received five submissions since the year 2020, including two submissions in 2024. Prior to implementation of this PGRR and posting on the ERCOT website of criteria submissions to ERCOT, TSPs are encouraged to confirm their criteria submissions in the MIS Secure Area, if any, don’t contain ECEII and label the cover page and pages or portions of any ECEII submitted to ERCOT pursuant to paragraph (1) of Protocol Section 1.3.2.2, Submission of ERCOT Critical Energy Infrastructure Information to ERCOT.  This PGRR also updates Planning Guide language to reflect the current practice of posting on the ERCOT website the Demand and Energy Monthly report, adding a requirement to include 15-minute interval data that is included in a version of the report currently posted on only the MIS Secure Area. ERCOT Staff analyzed the 15-minute interval data, along with existing Protocols for posting requirements, and identified no ongoing basis for holding in the MIS Secure Area Demand and Energy Monthly Reports that contain 15-minute interval data and not ECEII. This PGRR correspondingly updates the chart of data sets and designated classifications in paragraph (2) of Section 7.1.  Finally, this PGRR clarifies the chart of data sets and designated classifications in paragraph (2) of Section 7.1 of the Guide does not constitute posting requirements. The chart is updated to reflect Generation Interconnection data sets now processed in Resource Integration and On-going Operations – Resource Services (RIOO-RS) rather than posted on the MIS Secure Area and removes references to Generation Interconnection or Change Request (GINR) forms no longer in use. | |
| Reason for Revision | | [Strategic Plan](https://www.ercot.com/files/docs/2023/08/25/ERCOT-Strategic-Plan-2024-2028.pdf) Objective 1 – Be an industry leader for grid reliability and resilience  [Strategic Plan](https://www.ercot.com/files/docs/2023/08/25/ERCOT-Strategic-Plan-2024-2028.pdf) Objective 2 - Enhance the ERCOT region’s economic competitiveness with respect to trends in wholesale power rates and retail electricity prices to consumers  [Strategic Plan](https://www.ercot.com/files/docs/2023/08/25/ERCOT-Strategic-Plan-2024-2028.pdf) Objective 3 - Advance ERCOT, Inc. as an independent leading industry expert and an employer of choice by fostering innovation, investing in our people, and emphasizing the importance of our mission  General system and/or process improvement(s)  Regulatory requirements  ERCOT Board/PUCT Directive  *(please select ONLY ONE – if more than one apply, please select the ONE that is most relevant)* | |
| Justification of Reason for Revision and Market Impacts | | Reports that are not Protected Information in the MIS Secure Area are available to any registered Market Participant who requests a standard Digital Certificate from ERCOT, and paragraph (1)(j) of Protocol Section 1.3.1.2, Items Not Considered Protected Information, treats similarly requirements to post non-Protected Information on the ERCOT website or on the MIS Secure Area. This Revision Request moves reports that are not ECEII from the MIS Secure Area to the ERCOT website so the public can directly access reports that are not Protected Information without registering as a Market Participant and requesting ERCOT to issue a Digital Certificate, or without submitting an ERCOT Information Request. | |

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| Proposed Protocol Language Revision |

**3.1.1.1 Long-Term System Assessment**

(1) The Long-Term System Assessment (LTSA) is performed by ERCOT in coordination with the Regional Planning Group (RPG) on a biennial basis (in even-numbered years) and reviewed annually. The study uses scenario analysis techniques to assess the potential needs of the ERCOT System up to 20 years into the future. The role of the LTSA is not to recommend the construction of specific system upgrades, due to the high degree of uncertainty associated with the amount and location of loads and Resources in this timeframe. Instead, the role of the LTSA is to evaluate the system upgrades that are indicated under each of a wide variety of scenarios in order to identify upgrades that are robust across a range of scenarios or might be more economic than the upgrades that would be determined considering only needs of Years 1 to 6 in the Regional Transmission Plan development.

(2) ERCOT shall post the Long-Term System Assessment as follows:

(a) Versions that include ERCOT Critical Energy Infrastructure Information (ECEII) shall be posted on the Market Information System (MIS) Secure Area;

(b) Versions that include both ECEII and Protected Information shall be posted on the MIS Certified Area for TSPs only; and

(c) Versions redacted of ECEII and Protected Information shall be posted on the ERCOT website.

4.1 Introduction

(1) ERCOT employs both reliability criteria and economic criteria in evaluating the need for transmission system improvements. The economic criteria are included in Protocol Section 3.11.2, Planning Criteria. This Planning Guide provides the reliability criteria.

(2) The ERCOT System consists of those generation and Transmission Facilities (60 kV and higher voltages) that are controlled by individual Market Participants and that function as part of an integrated and coordinated system.

(3) To maintain reliable operation of the ERCOT System, it is necessary that all stakeholders observe and subscribe to certain minimum planning criteria. The criteria set forth in this Section 4.1 constitute the aforementioned minimum planning criteria. Tests outlined herein shall be performed to determine conformance to these minimum criteria; however, ERCOT recognizes that events more severe than those outlined in these criteria could cause grid separation and other tests may also be performed.

(4) The complexity and uncertainty inherent in the planning and operation of the ERCOT System make exhaustive studies impracticable; therefore, to gain maximum benefit from the limited number of tests performed, the selection of the specific tests and the frequency of their performance will be made solely upon the basis of the expected value of the reliability information obtainable from the test.

(5) ERCOT shall perform steady-state, short circuit, and dynamic analyses appropriate to ensure the reliability of the ERCOT System and identify appropriate solutions.

(6) Each Transmission Service Provider (TSP) will perform steady-state, short circuit, and dynamic analyses appropriate to ensure the reliability of its portion of the ERCOT System and implement appropriate solutions to meet the reliability performance criteria in this Section 4.1.

(7) The base cases created by the Steady-State Working Group (SSWG) and System Protection Working Group (SPWG) are available for use by Market Participants.

(8) If a TSP has its own planning criteria in addition to those defined in this Planning Guide, the TSP shall provide documentation of those criteria to ERCOT. ERCOT shall post the documentation on the ERCOT website. The TSP shall notify ERCOT of any changes to their planning criteria and provide revised documentation within 30 days of such change.

***7.1 Planning Data and Information***

(1) The information available on the ERCOT website or applicable Market Information System (MIS) (i.e., Secure or Certified Areas) includes, but is not limited to, planning information pertaining to the following:

(a) Long-term planning;

(b) Regional transmission planning;

(c) Steady state data;

(d) Resource integration;

(e) Case studies and files used in planning;

(f) Model information; and

(g) Data and information available to specific groups of Market Participants.

(i) Market Participants with a nondisclosure agreement with ERCOT have designated sections on the MIS that allow access to the certified posting of group information.

(ii) Market Participants may access the artifacts posted for their respective groups on the MIS Secure Area.

(h) Information on the ERCOT website pertaining to energy and demand shall include monthly reports with 15-minute interval data.

(2) The list below includes both data set and designated MIS classification of the available planning data and information. Where the information is classified as “Certified,” the appropriate Market Participant category or group is also indicated. “RIOO-RS” indicates information in Resource Integration and On-going Operations–Resource Services. Information classified as “Public” is available on the ERCOT website. The list below is intended to be only a general guide and not controlling language, and any conflict between this list and another section of the Planning Guide is controlled by the other section.

| **Data Set** | **Classification** |
| --- | --- |
| Aggregated Wind Output | Public |
| Annual Planning Model Data Submittal Schedule | Secure |
| Demand and Energy Monthly Reports | ERCOT website |
| Dynamic Data Information | Certified (all Transmission Service Providers (TSPs)) |
| Economic Studies of Transmission Projects for New Generation | Secure |
| ERCOT Long-Term System Assessment (LTSA) (except for Protected Information) – includes ERCOT Critical Energy Infrastructure Information (ECEII) | Secure |
| ERCOT LTSA – includes ECEII and Protected Information | Certified (all TSPs) |
| ERCOT LTSA (redacted) – excludes ECEII and Protected Information | ERCOT website |
| ERCOT Steady State Planning Contingency Files | Secure |
| ERCOT System Operating Limit (SOL) Methodology | Public |
| Generator Interconnection Status (GIS) Report | Public |
| Geomagnetically-Induced Current ([GIC) Flow Information](https://mis.ercot.com/secure/data-products/grid/regional-planning?id=PG3-953-M) | Secure |
| Geomagnetic Disturbance (GMD) Vulnerability Assessment Postings (except for Protected Information) | Secure |
| GMD Vulnerability Assessment Postings | Certified (all TSPs) |
| Documents Initiating a Generation Interconnection or Change Request | Secure (RIOO-RS) |
| Security Screening Studies and Supporting Documents | Secure (RIOO-RS) |
| Sub-synchronous Oscillation Studies and Supporting Documents | Certified (all TSPs) |
| Full Interconnection Study (FIS): Steady-State, System Protection, Stability, and Facility Studies and Supporting Documents (except for Protected Information) | Secure |
| FIS: Draft Steady-State, System Protection, Stability, and Facility Studies and Supporting Documents | Certified (all TSPs) |
| Independent Market Monitor (IMM) and Topology Processor Supporting Documents | Certified (all TSPs) |
| Performance, Disturbance, Compliance Working Group (PDCWG) Group Documents and Project Files | Certified (PDCWG members) |
| Public Generation Information | Public |
| Remedial Action Plan (RAP) Review Cases | Certified (all TSPs) |
| Resource Registration Data | Certified (all TSPs) |
| Regional Planning Group Projects | Secure |
| Regional Transmission Plan Postings (except for Protected Information) | Secure |
| Regional Transmission Plan Postings | Certified (all TSPs) |
| Seasonal Voltage Profile Studies | Certified (all TSPs) |
| Special Planning Studies (except for Protected Information) | Secure |
| Special Planning Studies | Certified (all TSPs) |
| Steady State Power Flow Base Cases | Secure |
| Steady State Power Flow Case Data | Certified (all TSPs) |
| Steady State Topology Processor Files | Secure |
| Steady State Transmission Project and Information Tracking (TPIT) Procedures | Secure |
| System Protection Short Circuit Data | Secure |
| Transient Stability Screening Study for ERCOT System | Certified (all TSPs) |
| TSP Planning Criteria and Procedures | ERCOT website |
| Voltage Stability Screening Study for ERCOT System | Certified (all TSPs) |

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| ***[PGRR108: Replace paragraph (2) above with the following upon system implementation of NPRR1183:]***  (2) The list below includes both data set and designated classification of the available planning data and information. Where the information is classified as “Certified,” the appropriate Market Participant category or group is “(all TSPs)” to indicate all Transmission Service Providers (TSPs) or “(PDCWG members)” to indicate members of the Performance, Disturbance, Compliance Working Group (PDCWG).   | **Data Set** | **Classification** | | --- | --- | | Aggregated Wind Output | ERCOT website | | Annual Planning Model Data Submittal Schedule | Secure | | Demand and Energy Monthly Reports | ERCOT website | | Dynamic Data Information | Certified (all TSPs) | | Economic Studies of Transmission Projects for New Generation | Secure | | ERCOT Long-Term System Assessment (LTSA) (except for Protected Information) – includes ERCOT Critical Energy Infrastructure Information (ECEII) | Secure | | ERCOT LTSA – includes ECEII and Protected Information | Certified (all TSPs) | | ERCOT LTSA (redacted) – excludes ECEII and Protected Information | ERCOT website | | ERCOT Steady State Planning Contingency Files | Secure | | ERCOT System Operating Limit (SOL) Methodology | ERCOT website | | Generator Interconnection Status (GIS) Report | ERCOT website | | Geomagnetically-Induced Current ([GIC) Flow Information](https://mis.ercot.com/secure/data-products/grid/regional-planning?id=PG3-953-M) | Secure | | Geomagnetic Disturbance (GMD) Vulnerability Assessment Postings (except for Protected Information) – includes ERCOT Critical Energy Infrastructure Information (ECEII) | Secure | | GMD Vulnerability Assessment Postings – includes ECEII and Protected Information | Certified (all TSPs) | | GMD Vulnerability Assessment Postings (redacted) – excludes ECEII and Protected Information | ERCOT website | | Documents Initiating a Generation Interconnection or Change Request | Secure (RIOO-RS) | | Security Screening Studies and Supporting Documents | Secure (RIOO-RS) | | Sub-synchronous Oscillation Studies and Supporting Documents | Certified (all TSPs) | | Full Interconnection Study (FIS): Steady-State, System Protection, Stability, and Facility Studies and Supporting Documents (except for Protected Information) | Secure | | FIS: Draft Steady-State, System Protection, Stability, and Facility Studies and Supporting Documents | Certified (all TSPs) | | Independent Market Monitor (IMM) and Topology Processor Supporting Documents | Certified (all TSPs) | | Performance, Disturbance, Compliance Working Group (PDCWG) Group Documents and Project Files | Certified (PDCWG members) | | Public Generation Information | ERCOT website | | Remedial Action Plan (RAP) Review Cases | Certified (all TSPs) | | Resource Registration Data | Certified (all TSPs) | | Regional Planning Group Projects | Secure | | Regional Transmission Plan Postings (except for Protected Information) – includes ERCOT Critical Energy Infrastructure Information (ECEII) | Secure | | Regional Transmission Plan Postings – includes ECEII and Protected Information | Certified (all TSPs) | | Regional Transmission Plan Postings (redacted) – excludes ECEII and Protected Information | ERCOT website | | Seasonal Voltage Profile Studies | Certified (all TSPs) | | Special Planning Studies (except for Protected Information) | Secure | | Special Planning Studies | Certified (all TSPs) | | Steady State Power Flow Base Cases | Secure | | Steady State Power Flow Case Data | Certified (all TSPs) | | Steady State Topology Processor Files | Secure | | Steady State Transmission Project and Information Tracking (TPIT) Procedures | Secure | | System Protection Short Circuit Data | Secure | | Transient Stability Screening Study for ERCOT System | Certified (all TSPs) | | TSP Planning Criteria and Procedures | ERCOT website | | Voltage Stability Screening Study for ERCOT System | Certified (all TSPs) | |