

# **NAESB OASIS Sub-Committee**

August 19<sup>th</sup>, 2013



# NAESB OS Overview

- 1. Tasked with setting national standards in support of FERC directives**
- 2. Standards are to be established through national dialogue and with the consensus of the nations transmission providers and transmission customers.**
- 3. The OASIS Subcommittee (OS) has been established to determine and publish these standards.**
- 4. All transmission providers and customers are invited to participate in the monthly OS meetings where these standards are “hammered-out”, however, only NAESB members can vote.**
- 5. Monthly OS meetings follow are fairly formal, allowing one person to speak at a time. When consensus seems close on a topic, someone puts it into a motion for members to vote on.**
- 6. Motions and minutes are recorded and published and reviewed by FERC.**
- 7. Currently there are several off-line assignments where smaller groups are working together to resolve some bigger issues. BPA and several customers are involved in the various groups.**

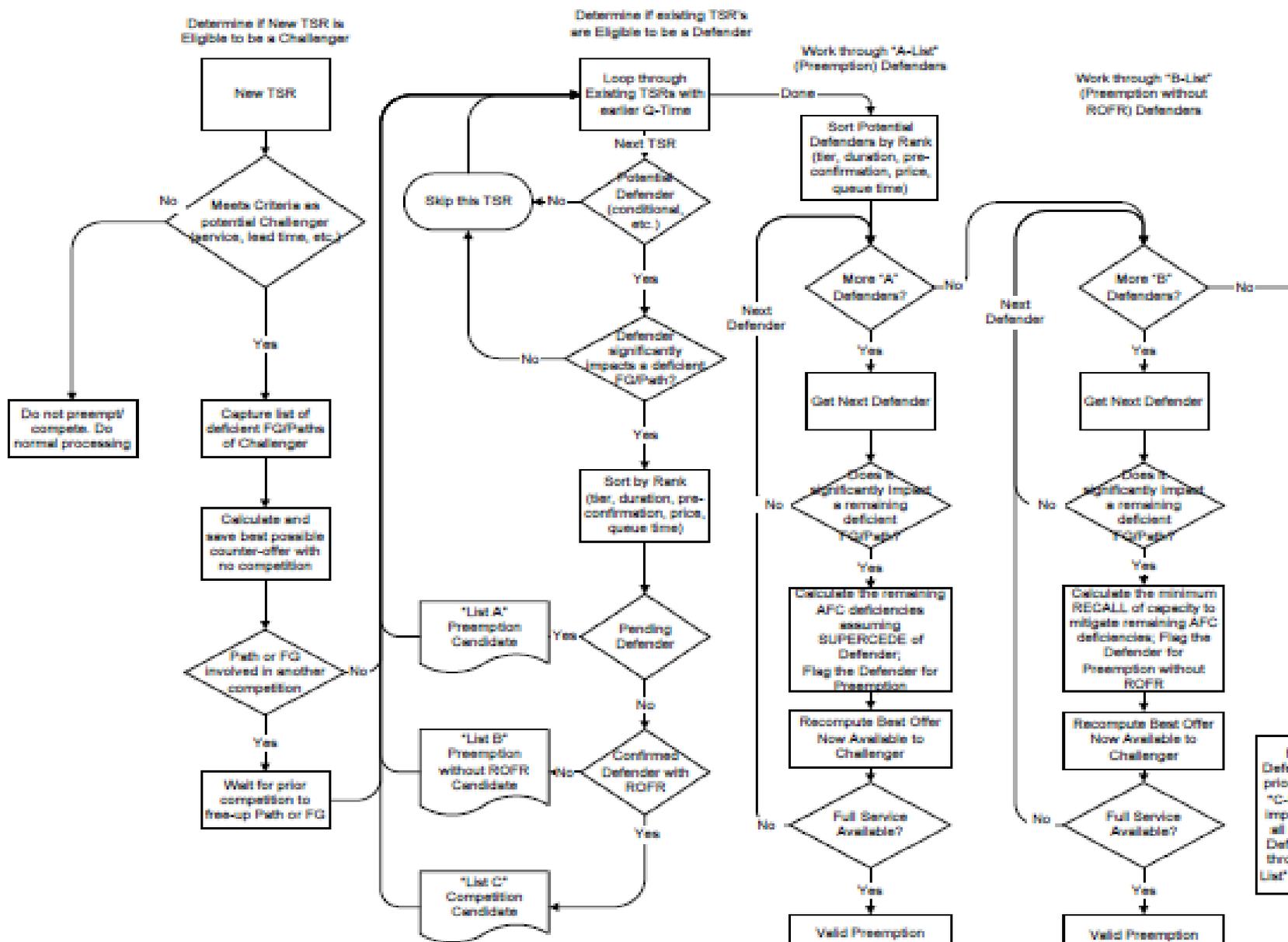
## Timing/Flowchart Assignment

### **Assigned to Matt Schingle (MISO)**

Interested Resources\* - Robin Cross, Brenna Moore, Rebecca Berdahl, Bob Zerfing, Paul Sorenson, Ken Quimby, Marie Pompel, Ron Robinson

### **Goals:**

1. Finish going through the process flowchart listing the steps and various options for each. (short term firm competition)
2. Develop options (choices) for each step, such as defender priority, ability to meet/exceed, match by changing start and/or stop date, etc. and give recommendation to each.
3. Develop a proposal on the sandbox (or something like the presubmittal workspace) and develop the recommendation. This needs to be settled because a lot of issues/decisions will vary depending upon what we do here.
4. Look at differences in the processes and timings between PTP and NT (Table 4-2 and Table 105-A). Address whether there should be timing differences between P&C with ROFR and P&C without ROFR.
5. Recommend revisions to Table 4-2 and Table 105-A if necessary to reflect new timings around competition.
6. Recommend unconditionality timing rules that respect motion 10.



# Sandbox

No help to the Challenger, then no harm to the Defenders.

1. Challenger has an initial choice to make if there are ROFR Defenders
  - Compete or not
  - Accept a partial with only A & B List Defenders
  - Accept a partial with only what is available through ATC/AFC.
  - Withdraw
  - Limited Time
2. Defender has a choice to make
  - Match or not
  - Mitigation
  - 24 Hours
3. If someone matches, then Challenger has a second choice to make
  - Accept Partial
  - Withdraw
  - Limited Time
4. If the Challenger withdraws, then the Defenders go back to their initial state.

## **Basis for Preemption and Competition Timing Considerations**

Attributes that impact the timing for Defenders.

1. Conditional Reservation Deadline – when a Firm PTP Reservation becomes safe from all challengers as defined in the pro forma OATT, section 13.2 (iii) – *one day before the commencement of daily service, one week before the commencement of weekly service, and one month before the commencement of monthly service*
  - Motion 10 – Confirmed Firm capacity cannot be taken away by preemption or competition after the Conditional Reservation Deadline (unconditional window begins) as defined in the pro forma OATT, section 13.2 (iii).
  - Conditional Reservation Deadline does not apply to pending Requests.
  - There is no Conditional Reservation Deadline for Non Firm Reservations.
2. Allotted time for the ROFR Defender to match as defined in the pro forma OATT, Section 13.2 (iii) – *...match the competing request within 24 hours (or earlier if necessary to comply with the scheduling deadlines)*
3. Time allowed for the PTP Challenger to Accept a Counter-Offer according to Table 4-2. See Table 105-A for NT Challengers. This is outside the current matching timing, but may be considered in the future.

**TABLE 4-2**  
**REQUEST TIMING REQUIREMENTS**

<b>Class</b>	<b>Service Increment</b>	<b>Time QUEUED Prior to Start</b>	<b>Provider Evaluation Time Limit<sup>1</sup></b>	<b>Customer Confirmation Time Limit<sup>2</sup> after ACCEPTED or COUNTEROFFER<sup>3</sup></b>	<b>Provider Counter Time Limit after REBID<sup>4</sup></b>
Non-Firm	Hourly	<1 hour	Best effort	5 minutes	5 minutes
Non-Firm	Hourly	>1 hour	30 minutes	5 minutes	5 minutes
Non-Firm	Hourly	Day ahead	30 minutes	30 minutes	10 minutes
Non-Firm	Daily	N/A	30 minutes	2 hours	10 minutes
Non-Firm	Weekly	N/A	4 hours	24 hours	4 hours
Non-Firm	Monthly	N/A	2 days <sup>5</sup>	24 hours	4 hours
Firm	Daily	< 24 hours	Best effort	2 hours	30 minutes
Firm	Daily	N/A	30 days <sup>6</sup>	24 hours	4 hours
Firm	Weekly	N/A	30 days <sup>6</sup>	48 hours	4 hours
Firm	Monthly	N/A	30 days <sup>6</sup>	4 days	4 hours
Firm	Yearly	60 days <sup>7</sup>	30 days	15 days	4 hours

## Non Firm Assignment (Tier 4 and below)

### **Assigned to Ken Quimby (SPP)**

Interested Resources\* - Paul Sorenson, Ron, Robin, Alex Swerzbin, Matt Schingle, Alan Pritchard, Danielle Johnson, Bob Zerfing

### **Goals:**

1. Develop a list of NAESB/FERC policy/legal differences (13.2/14.2/Others) between Firm and Non Firm, such as there being no Conditional Reservation Deadline for Non Firm.
  2. Develop a list of timing differences between Firm and Non Firm. Recommend any changes to Table 4-2. (Need to communicate with the Timing/Flowchart Taskforce on this issue)
2. Make a recommendation about Non Firm Hourly which is pro forma. What does it mean when a defender must match "immediately"? Should NF Hourly competition be excluded due to the short timeframes involved?
3. Make a recommendation(s) for treatment of NF P&C.

## Long Term Assignment (Competition associated with Section 2.2 OATT)

### **Assigned to Paul Sorenson (OATI)**

Interested Resources\* - Alan Pritchard, JT Wood, Rebecca Berdahl, Anne Wong, Rick Applegate, Megan Capper, Kyle Williams

LT competition deals with Renewals, Rollover Rights, and Deferrals. It is totally different than ST competitions. Instead of one challenger and many defenders, you have one defender who wants to renew or defer his reservation and several challengers who want a crack at it. This Taskforce will not address the Entergy Order.

### **Goals:**

1. Develop a list of the business and FERC rules around LT competition. Don't compare them to what we have done so far in the ST market.
2. Develop a process flow for LT much like we have for ST.
3. Develop motions that will lead to standards for LT.
4. Need to communicate with the NT Taskforce.

**Preemption Recommendation**  
**(OASIS Standards WEQ-000, 001, 002, 003, and 013) Assignment**

**Assigned to JT Wood (Southern Company)**

Interested Resources\* - Alan Pritchard, Narinder Saini, Robin Cross,  
Matt Schingle, Ken Quimby, Alex Swerzbin, Joshua Phillips,  
Rebecca Berdahl, Ron Robinson

**Goals:**

1. Develop a strawman recommendation that encompasses the subcommittees work including all motions and completed parking lot items.
2. Provide a cross reference from the changes to the motion or FERC citation that it is based on.

## **FERC Redirect Assignment (Entergy Order)**

### **Assigned to Alan Pritchard (Duke)**

Interested Resources\* - JT Wood, Rebecca Berdahl, Robin Cross,  
Narinder Saini, Brenna Moore

### **Goals:**

1. Identify the NAESB standards that need to be addressed if this Order is retained.
2. Identify impacts on P&C.

## **NT Assignment (short duration firm NITS and secondary NITS)**

### **Assigned to Alan Pritchard (Duke)**

Interested Resources\* - Brenna Moore, Alex Swerzbin, Robin Cross, Rebecca Berdahl, Ann Shintani, Bob Zerfing

### **Goals:**

1. Review NITS and provide a clear list of how any standards there will impact our current thinking/motions of how NT competes in the ST market.
2. Develop a matrix of motion revisions or new motions with columns for Pros and Cons from an NT perspective and a PTP perspective.
3. Identify conflicts with motions for NITS and propose new wording for any motions NT would like changed.

## OASIS Notification Assignment

### **Assigned to Marie Pompel (BPA Power)**

Interested Resources\* - Cory Anderson, Paul Sorenson

### **Goals:**

1. Propose a template structure for identification of Challengers and Defenders such that a report would show the initial identification the action taken during competition and the final results.
2. Propose a mechanism for customers to subscribe for dynamic notification (preemption and competition events).

## Tagging Adjustment/Notification Assignment

### **Assigned to Robin Cross (SCL)**

Interested Resources\* - Cory Anderson, Marie Pompel, Kelly Casto)

### **Goals:**

1. Need to clarify the expectations of the Transmission Customer (reservation holder) wants to merely to provide notice to tag authors or whether do they want the ability to adjust tags.
2. Is there a requirement needed for tag authors to implement tag adjustments directed by the Transmission Customer (reservation holder).
3. Should there be a requirement for the Transmission Provider to notify the Transmission Customer (reservation holder) of the tags affected due to competition.

## **Motion 47 Rework**

### **Assigned to Bob Zerfing**

Interested Resources: Original Team, Ian Hunter,

### **Goals:**

1. Evaluate the commercially similar paths requirement for NT Challengers.
2. Evaluate the possibility of establishing a “floor” to the 105% rule.

## Table 4-3, Row 3a, b, c

### **Assigned to Robin Cross**

Interested Resources: Bob Zerfing

### **Goals:**

1. Make a recommendation concerning if a preconfirmed request can preempt without ROFR another preconfirmed request of shorter duration.
2. Make a recommendation to clarify table 4-3, Rows 3a, b, and c.

**Simultaneous opportunities, windows, matching, etc.**

**Assigned to ???**

**Interested Resources: ???**

**Goals:**

**1. ???**

# **BPA Guiding Principles for Consideration of NAESB Standards Development**

1. Consistent with FERC guidance and the Tariff
2. Consistent with, and considerate of, Pacific Northwest regional business needs
3. Minimize unintentional market disruption
4. Efficient system and process implementation
5. Minimize opportunities for gaming