

Agenda Item 4.1: ICS Report to NYSRC Executive Committee (EC)
August 5, 2026, ICS Meeting #319
Prepared for: August 14, 2026, EC Meeting #328
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4.1.1 2027-2028 IRM PBC Tan45 Results

NYISO presented 2027-2028 IRM PBC Tan 45 results as shown below. Of note is the expanded reporting on URM¹ [which represents the reserve margin expressed in terms of Unforced Capacity (UCAP) rather than Installed Capacity (ICAP)]. See attached documents for more details.

Results	2026-2027 IRM FBC (Special Sensitivity)	2027-2028 IRM PBC Tan45	Delta
IRM	25.6%	30.8%	5.2%
Load Zone J	79.9%	85.9%	6.0%
Load zone K	107.5%	109.9%	2.4%
G-J Locality	89.2%	89.3%	0.1%
NYCA EOP (Days/yr)	6.2	5.2	-1.0
Winter Risk %	14.8%	9.10%	-5.7%
URM	8.3%	10.30%	2.0%

The main contributing factors to the large IRM increases are:

- New Generator Inclusion (Sensitivity S07): +3.2% IRM Impact, +0.9% URM Impact
 - 339 MW of wind in Load Zone A, 780 MW of solar in Load Zone B, 10 MW of energy storage in Load Zone C, and 100 MW of energy storage in Load Zone J.
- Thermal EFORD Data (Sensitivity S08): +1.1% IRM Impact, +0.8% URM Impact
 - LCR Impact as follows: +2.3% Load Zone J, +1.5% Load Zone K, +1.6% G-J

NYISO also presented preliminary 2027-2028 TSL floors noting that preliminary 2027-2028 Summer TSL floors are currently more binding than Winter TSL floors. NYISO also presented an impact analysis of the TSL floor values. This impact analysis demonstrated that adjusting the LCRs to respect the preliminary TSL floor values while maintaining the IRM from Tan45 results decreases LOLE from 0.100 to 0.080. Impact analysis also showed that by adjusting the LCRs to respect the preliminary TSL floor values while maintaining the LOLE at criteria, the IRM decreases by 1.4%. Compared to the 2026–2027 final TSL floor values and the IRM FBC, the gap between the preliminary 2027–2028 TSL floor values and the IRM PBC Tan45-determined locational requirements is smaller.

TSL Floor Impact	Case	G-J Locality	Load Zone J	Load Zone K	IRM	LOLE (days/yr)
2027-2028 IRM PBC	Tan45	89.3%	85.9%	109.9%	30.8%	0.100
	Tan45 IRM + TSL Floor	84.8%	88.6%	112.2%	30.8%	0.080
	IRM + TSL Floor (At-Criteria)	84.8%	88.6%	112.2%	29.4%	0.100

M. Mager asked how the presented URM and year over year change compares to historical values. NYISO replied that the URM is within range of historically observed figures as well as year over year variation. M. Cadwalader noted that while URM impact of new generators was smaller than IRM impact, he was still surprised by the URM impact. He further added that the new generators added 428 MW to UCAP based on UCAP translation factors but only resulted in 177MW of perfect capacity benefit

¹ Historical NYCA UCAP reserve margins based on market EFORD are available in the Annual IRM report appendices “D.1.1 New York Control Area ICAP to UCAP Translation”. This market EFORD differs from the translation factors used in IRM studies. For IRM studies, translation factors are derived from the generator modeling assumptions used in MARS, including 5-year EFORD values for thermal resources and 5-year availability factors for intermittent resources.

under Tan45 shifting. NYISO replied that this is correct and that they are looking into drivers. Stakeholder discussion occurred regarding the differences between UCAP translation factors and market CAFS (capacity accreditation factors). M. DeSocio noted the presentation was helpful and asked for a breakdown of ICAP modeled and shifted by Zone, NYISO added that this information is in the Tan45 points and curves document.

On the TSL impact assessment, R. Gonzales noted that the Zone J gap dropped from ~6% in the 2026-2027 FBC to ~2% based on PBC and preliminary TSL floors. NYISO noted that this is correct, and that several data updates including recommendations from the TSL-LCR Working Group as well as thermal EFORd data update contributed to the increase in the Tan45 Zone J LCR, with overall impact largely consistent with parametric analysis.

4.1.2 2027-2028 IRM PBC Parametric Results

NYISO presented the remaining parametric results for the PBC. Material changes include voluntary curtailment MW, firm transactions, winter fuel availability and constraints modeling, and external data + Policy 5 adjustments. Parametric results currently stand at 31.74% IRM, 85.32% NYC, 90.71% LHV, 109.02% LI as compared to the 2026-27 FBC of 25.6% IRM, 79.8% NYC, 89.2% LHV, and 107.5% LI. See attached parametric analysis for IRM impacts and non-material changes.

C. Wentlent asked for additional detail on the external data and Policy 5 adjustments. NYISO noted that this includes updating 4 external areas from the NPCC CP-8 MARS case in addition to Policy 5 adjustments that prescribe modeling areas external to NYCA at no better than their LOLE criteria with an IRM no higher than their own requirement. NYISO noted that load growth and increased intermittency in external control areas also may contribute to parametric impact.

4.1.3 2027-2028 IRM PBC – Proposed Sensitivity Cases – Approval Item

NYISO presented the sensitivity list from last month. Two sensitivities were added to improve clarity for stakeholders based on ICS/EC feedback. Sensitivity S07 tests “No New Generator Inclusion”, and Sensitivity S08 tests “2020-2024 Thermal EFORd Data”. These Tan45 sensitivities demonstrate individual impact of two of the largest drivers of year over year IRM/LCR change. These sensitivities were presented in advance as part of item 4.1.1 in response to stakeholder interest.

Standard annual sensitivities include NYCA-isolated, no internal NYCA transmission constraints, no LFU, and no wind capacity (all wind). NYISO recommended adding a Tan45 sensitivity based on direct modeling of firm fuel character elections for the 2026-2027 Capability Year and removing the No Special Case Resource (SCR) Capacity sensitivity. NYISO also recommended a Tan45 base case assumption sensitivity for Empire and Sunrise Wind (Showing impact of including the Empire and Sunrise Wind units).

ICS approved the sensitivity list and is requesting EC approval at this meeting.

4.1.4 Demand Response: 2027-2028 IRM Study Final Base Case Values

NYISO presented Final Base Case values for Demand Response resources in the 2027-2028 IRM Study, as well as background on the methodology and inputs used in forming their recommendation. NYISO also provided detail behind additional steps used in calculating January SCR values. Additional data used in informing changes to the SCR model from 2026-2027 IRM FBC include:

- Winter 2024-2025 and Summer 2025 SCR performance test hours – total of 2 hours
- Winter 2025-2026 performance test hours – total of 1 hour
- Summer 2025 SCR event hours – total of 62 hours

- Winter 2025-2026 SCR event hours – total of 55 hours

The incremental data is part of a larger SCR dataset spanning all event hours, by zone, from mandatory events from Summer 2012 through Winter 2025-2026, as well as all performance test hours from Summer 2012 through Winter 2025-2026. Overall July max modeled SCR capacity for the 2027-2028 FBC decreased to 574.5MW compared to 727MW in the IRM 2026-2027 FBC (679.6MW in 2027-2028 PBC). 346.4MW of SCR capacity was recommended for modeling in January in the 2027-2028 FBC.

NYISO also covered Distributed Energy Resource (DER) Aggregation Enrollments. 340.5MW of DER resources are recommended for modeling in the 2027-2028FBC (all but 0.5 MW of which are in Zones A-E), down 140MW from the 2026-2027 FBC. More detail, including SCR response rates, are available in the attached.

M. Mager questioned the relevance of retaining SCR data dating back to 2012. NYISO noted that data will eventually be “rolled-off” based on inclusion rules, but that it is important to maintain enough data to support response rate calculation across durations and locations. T. Primrose commented that the extra information provided by NYISO on data inclusion was helpful and noted a graphic may be helpful to demonstrate quantity and age of data supporting various response rates.

4.1.5 Additional Agenda Items

During the call for additional agenda items, W. Gunther asked if there is follow-up to a comment T. Primrose made at ICAP Working Group on differences in transfer limits in the IRM model and RNA model for 2027. NYISO replied that they have consulted operations and are discussing between teams internally.

Stakeholders also discussed the “as-needed” mid-august ICS meeting. This meeting will be used to finalize/approve PBC results and discuss TO database validation.