

Agenda Item 4.1: ICS Report to NYSRC Executive Committee (EC)**September 29, 2026, ICS Meeting #322****Prepared for: October 8, 2026, EC Meeting #330****Prepared by: Thomas Primrose (PSEGLI)****4.1.1 New Generator Screening: 2027-2028 IRM FBC**

ICS discussed the new generator screening for the 2027-2028 IRM FBC. NYISO recommends retaining the generation assumptions from PBC and including Ticonderoga Solar (20 MW-Zone F), as well as Curtis and Plamer Hydro (58.8MW-Zone F). Excelsior Energy Center was previously identified as “under consideration” for FBC inclusion at the 9/2/2026 ICS meeting and the NYISO has since confirmed that the project has sufficiently advanced its development. Curtis and Palmer are existing non-market generators that received 58.8MW of CRIS through the 2025-02 EDS. Since PBC, Ticonderoga Solar has initiated the customer registration process, supporting its inclusion in the IRM study. A summary table of all new resources added since prior years FBC is shown below.

	Project Name	Unit Type	Zone	Summer ICAP (MW)	Winter ICAP (MW)
2027-2028 IRM PBC	Alle Catt II Wind	Wind	A	339.1	339.1
	Excelsior Energy Center	Solar	B	280.0	280.0
	Cider Solar	Solar	B	500.0	500.0
	Astoria Energy Storage	Energy Storage	J	100.0	100.0
	Orangeville ESR	Energy Storage	C	10.0	10.0
2027-2028 IRM FBC *	Ticonderoga Solar	Solar	F	20.0	20.0
	Curtis and Palmer	Hydro	F	58.8	58.8
Total				1307.9	1307.9

NYISO also recommends inclusion of Shoreham IC #2 (16.7MW-Zone K) for the FBC consistent with its selection as part of the solution for the reliability needs identified in the 2025 Q3 STAR on Long Island.

M. Mager asked for clarification on specific steps Ticonderoga Solar took that initiated the recommendation for inclusion. NYISO clarified that Ticonderoga has made significant progress and customer registration was the “tipping point”. NYISO also clarified that Shoreham IC #2 is a reactivation of existing generation. G. Jordan asked for further detail on projects that are not included primarily due to COD. NYISO replied that there is a supplemental posting of other projects being monitored but added that currently Policy 5 specifies June 1st as the criteria.

4.1.2 2027-2028 IRM FBC Topology Updates

NYISO presented background and impact analysis for identified additional recommended transfer limit updates for the FBC. NYISO recommended decreasing the annual interface transfer limit for the UPNY-SENY Interface Group to 6,400 MW (previously 7,150 MW) to align with the summer transfer limit reported in the 2026 RNA. NYISO also recommended a methodology for establishing the UPNY-ConEd interface MARS topology limit using the most recent UPNY-ConEd Voltage Collapse Transfer Limit study. This methodology results in an updated UPNY-ConEd transfer limit of 7,100 MW (previously 7,050MW). NYISO presented on Winter transfer limits received from applicable transmission owners for Y49/Y50, IJ to K, Jamaica Ties Reverse, and LI West Reverse. IRM impact of the combined changes is -0.10% at the PBC Tan45 point (Impact was sampled at various points along the Tan45 curve to bring partial Tan45 impact analysis to ICS 322).

IRM Impact of FBC Interface Limit Changes on Tan45 Points				
Case	Low Point	PBC Tan45 Point	Intermediate Point	High Point
27-28 IRM PBC	29.00%	30.80%	32.50%	34.50%
Proposed FBC Topology Updates	28.81%	30.70%	32.47%	34.53%
Delta	-0.19%	-0.10%	-0.03%	+0.03%

M. DeSocio asked for clarification on the UPNY-ConEd voltage limit in relation to underlying Bowline/Roseton outage conditions. NYISO replied that the static limit was chosen to align with frequently observed outage conditions. NYISO also reiterated that a dynamic UPNY-ConEd limit would require modeling of >20 equipment condition states. M. DeSocio added that it would be prudent to revisit the UPNY-ConEd limit study based on recent system changes (Knickerbocker series compensation, CHPE). On the LI topology assumptions NYISO also noted the LI interfaces show increased flow under the no internal constraints sensitivity, and as such, the inclusion of Winter specific limits is in line with the established process.

4.1.3 Resource Adequacy Modeling Improvements Strategic Plan

NYISO presented an update on the Resource Adequacy Modeling Improvements Strategic Plan (2027-2031). The strategic plan presentation is attached for additional detail. Recommended strategic plan updates include:

- Expansion of load modeling priority into two coordinated initiatives:
 - “Load Shape and LFU Review” including the assessment of updated load shapes, updates to BTM solar modeling, and Load Zone-specific winter LFU considerations
 - “Large Load Modeling” including assessment of implications for the potential to implement various withdrawal service options for large loads in response to FERC’s Show Cause Order related to large load matters
- Advance the “Winter Fuel Availability Constraints” initiative to the implementation phase for 2027- Continue updating model assumption with relevant data and evaluating the potential need for expansion of fuel availability constraints beyond Load Zones F through K
- Defer the “Winter Emergency Assistance” initiative to 2028 pending available historical data
- Add the “Standard Error Enhancements” initiative beginning in 2028

M. DeSocio asked if the plan as-presented suggests that the earliest adoption of seasonal inclusion is the 2030 study. NYISO replied that if improvements can be implemented earlier they will be, but that some components of the seasonal reliability enhancements need to be aligned with the Tan45 review in a holistic approach. M. DeSocio reiterated a preference to emphasize seasonal considerations for inclusion rules if possible. M. Cadwalader raised the issue of 9300-code outages in relation to recently proposed changes in EFORD calculation for the TSL-floors to net out events caused by planned transmission work. NYISO replied that this is part of a larger discussion, but that it can be considered. W. Gunther asked if NYISO is adequately resourced to execute this plan, to which NYISO replied that they are if all goes well, but followed on that a full Tan45 costs ~\$8,000 and computational budgets are a challenge.

4.1.4 2027 ICS Draft Goals

T. Primrose proposed draft 2027 ICS goals in line with several themes from the RA strategic plan:

- A1.1: Investigate Tan 45 methodology improvements or alternative IRM establishment methodologies
- A1.2: Explore MARS Energy Limited Resource (ELR) Logic and areas of improvement

- A1.3: Incorporate updates to load modeling (LFU Phase 4 work such as representative load shapes, BTM solar modifications, and Winter LFU assumptions)
- A1.4: Assessment of IRM firm and non-firm service constructs for large loads
- A1.5: Incorporate improved seasonal representation of EOP call limitations (public appeals and voluntary industrial curtailments)
- A1.6: Investigate seasonal reliability enhancements such as seasonal derating factors, seasonal EFORd tool, seasonal criteria and shifting, and review of seasonal generator inclusion.

M. DeSocio noted that generator inclusion rules were not a part of the proposed goals. T. Primrose committed to adding a review of generator inclusion to A1.6. ICS approved the 2027 draft goals, and the attached document reflects the suggested change.

4.1.5 October 7th Special ICS

Due to a delay in some TO input for the fall load forecast (originally expected to be reviewed at the 9/28 LFTF) the fall load forecast presentation was scheduled for 10/5. Since the fall load forecast is an approval item and part of the FBC assumptions matrix. A special ICS will be convened on October 7th to present and approve the forecast. This is a necessary step to bring a complete package of assumptions for EC approval on October 8th. ICS scheduled the special ICS for October 7th at 9am. A final copy of the FBC assumptions matrix with the fall load forecast will be available after this meeting.

4.1.6 2027-2028 IRM FBC Assumptions Matrix [EC Approval Item] and FBC Parametric Results

NYISO presented the final base case assumptions matrix with numerous changes since the PBC. Two material changes, Voluntary Curtailment and Public Appeals MW Update, and Winter Fuel Allocation Update, were presented with -0.18% and -0.07% IRM impact respectively. Also of note, Seasonal Unforced Capacity Deliverability Rights (UDR) Elections had non-material IRM impact (-0.04%), but -0.62% NYC and +0.98% LI LCR impact. Parametric results currently stand at 30.3% IRM, 85.5% NYC, 89.1% LHV, 111.0% LI as compared to the PBC of 30.8% IRM, 85.9% NYC, 89.3% LHV, and 109.9% LI. Remaining updates to FBC for this cycle include the following:

- New Generator Screening
- Emergency Operating Procedure (EOP) MW Update
- Fall Load Forecast
- Topology Update

Attachment G7 of the FBC assumptions matrix represents the final update towards action item EC322-2(b). There are no methodology changes since PBC, however fuel availability magnitude and zonal allocation are updated per the approved standing process. This attachment and comparison to PBC assumptions is attached for reference.

M. DeSocio asked for clarification that modeled ICAP includes updated seasonal UDR elections, NYISO noted that they are included among other standard updates and that they will note this in the next posting. Various stakeholders (M. DeSocio and R. Stalter) expressed skepticism of the piecemeal approval approach and emphasized a need to clearly delineate what was approved. T. Primrose stated that he took this approach since regularly scheduled ICS meetings draw more stakeholders, and that he wanted to pursue approval with the most ICS members in attendance. M. DeSocio presented a hypothetical of new non-load information becoming available between ICS 322 and approval of the fall load forecast and how that would be considered. NYISO and T. Primrose noted that Policy 5 has safety

valves for material changes post-assumptions matrix approval (I.E. special sensitivity or Policy 5 section 5.3).

ICS approved the FBC assumptions matrix¹ excepting the fall load forecast which is an approval item for the October 7th special ICS. The 2027-2028 IRM FBC Assumptions Matrix is an EC approval item. The approval at ICS 322 covers the assumptions matrix **except** for the tables below that have dependencies on the fall load forecast:

- Peak load forecasts for summer and winter (Items **2a**, **2b**, and Attachments **A1-a**, **A1-b**)
- Annual energy forecast (Item **5b** and Attachment **A4**)
- Load component of BTM:NG (Item **18** and Attachment **B5**)
- Manual and Remote Voltage Reduction (Item **36** and Attachment **D**)

A final voting copy of the FBC assumptions matrix will be provided for EC immediately following the approval of the fall load forecast at the October 7th special ICS.

¹ The FBC assumptions matrix prior to the fall load forecast update (and tables with load dependencies) is available as part of the ICS 322 meeting materials: [ICS 322](#)