



Energy Assurance
BAL-007-1 and BAL-008-1, and
Future Long-term Assessment Standard

July 10, 2024

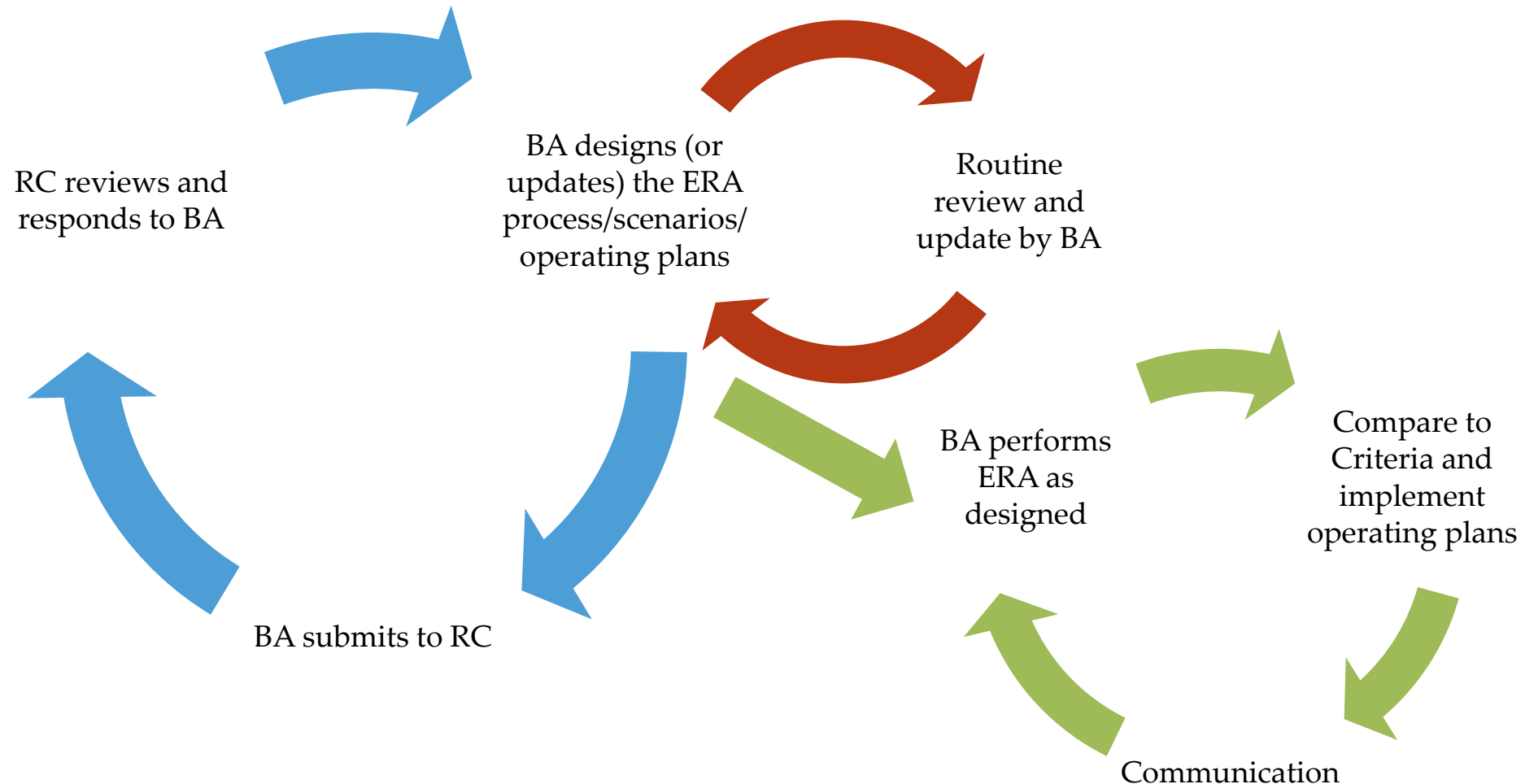
Kevin Conway, Western
Power Pool

Background—Timeline

- *White paper: Ensuring Energy Adequacy with Energy-constrained Resources—December 2020*
- ERATF was formed in March 2021
 - Evaluated existing practices and NERC Standards
 - Convened Energy Analysis Workshop in February 2022
 - SARs for energy assessments with energy-constrained resources submitted in June 2022
- SARs were approved by Standards Committee in January 2023 with requirements for:
 - Performance of energy reliability assessments
 - Coordination between areas
 - Comparison of results to criteria and the implementation of actions
- Initial draft of TOP-0XX was posted for informal comments in September 2023—became BAL-007-1
- Draft 1 of BAL-007-1 was posted for formal comment and vote in January 2024—received 6% approval
- Draft 2 of BAL-007-1 was posted for formal comment and vote in May 2024 —received 17% approval
- Initial Draft 1 of BAL-008-1 was posted for formal comment and vote in May 2024—also received 17% approval
- These processes DO NOT replace the NERC LTRA, ProbA, and Seasonal Assessments

General Requirements Overview

BAL-007-1 for Near-term Energy Reliability Assessments



Requirement Details BAL-007—Develop

- Requirement 1—BA document and maintain an Energy Reliability Assessment (ERA) process
 - Covers five days to six weeks (look forward) with no period/hour left unstudied
- Requirement 2—BA document and maintain a set of scenarios or method to create scenarios to study
 - Must vary one or more of the following:
 - Demand
 - Energy supply
 - Fuel supply
 - Generator outages
- Requirement 3—BA document and maintain one or more operating plan

Requirement Details BAL-007—Maintain

- Requirement 4—BA reviews and updates the process, scenario or method, and operating plan developed in R 1-3
 - At least once every 24 months
- Requirement 5—BA provides process, scenario or method, and operating plan to RC
 - At least once every 24 months
- Requirement 6—RC reviews BA-submitted documentation and coordinates with other BAs in the RC's footprint
- Requirement 7—BA addresses any concerns identified by RC review and resubmits to RC

Requirement Details BAL-007—Perform

- Requirement 8—BA performs the Near-term ERA
- Requirement 9—If ERA identifies any forecast energy emergencies listed below, BA implements the operating plan identified in R3
 - Forecast EEA1 circumstances as defined in EOP-011, Attachment 1, Section B
 - Forecast EEA2 circumstances as defined in EOP-011, Attachment 1, Section B
 - Forecast EEA3 circumstances as defined in EOP-011, Attachment 1, Section B
- Requirement 10—RC notifies other BAs, Transmission Providers (TP), and neighboring RCs if an operating plan has been implemented by a BA within the RC footprint

EOP-011-2, Attachment 1, Section B

1. EEA 1 — All available generation resources in use.

Circumstances:

- The Balancing Authority is experiencing conditions where all available generation resources are committed to meet firm Load, firm transactions, and reserve commitments, and is concerned about sustaining its required Contingency Reserves.
- Non-firm wholesale energy sales (other than those that are recallable to meet reserve requirements) have been curtailed.

2. EEA 2 — Load management procedures in effect.

Circumstances:

- The Balancing Authority is no longer able to provide its expected energy requirements and is an energy deficient Balancing Authority.
- An energy deficient Balancing Authority has implemented its Operating Plan(s) to mitigate Emergencies.
- An energy deficient Balancing Authority is still able to maintain minimum Contingency Reserve requirements.

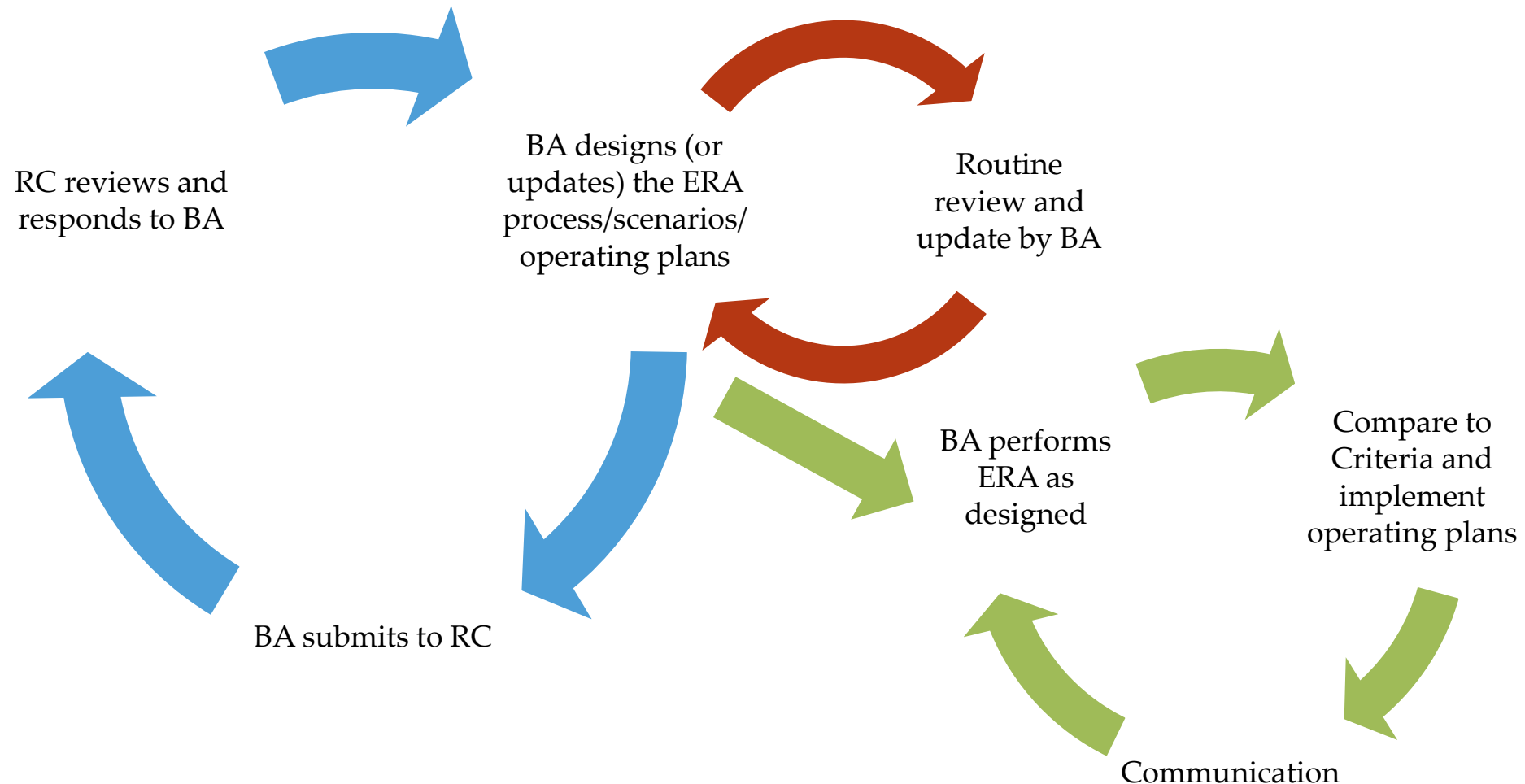
3. EEA 3 — Firm Load interruption is imminent or in progress.

Circumstances:

- The energy deficient Balancing Authority is unable to meet minimum Contingency Reserve requirements.

General Requirements Overview

BAL-008-1 for Seasonal Energy Reliability Assessments



Requirement Details BAL-008—Develop

- Requirement 1—BA documents and maintains an ERA process
 - BA defines season and duration
 - At least 30 calendar days and no greater than 12 months before studied season
- Requirement 2—BA documents and maintains a set of scenarios or a method to create scenarios to study
 - Must vary one or more of the following:
 - Demand
 - Energy supply
 - Fuel supply
 - Generator outages
- Requirement 3—BA documents and maintains one or more operating plan

Requirement Details BAL-008—Maintain

- Requirement 4—BA maintains documented specification of data needed from Resource Planners (RP)
 - Data shall include:
 - List of data needed
 - Periodicity for providing data
 - Deadline to provide data
- Requirement 5—BA shall distribute data requirements to RPs
- Requirement 6—RP shall submit required data to BA using:
 - Mutually agreed format
 - Mutually agreed process for resolving data conflicts
 - Mutually agreed security protocol

Requirement Details BAL-008—Maintain

- Requirement 7—BA reviews and updates the process, scenario or method, and operating plan developed in R 1-3
 - At least once every 24 months
- Requirement 8—BA provides process, scenario or method, and operating plan to RC
 - At least once every 24 months

Requirement Details BAL-008—Perform

- Requirement 9—Within 60 calendar days the RC shall:
 - Review and coordinate BA submittals to avoid risks to West-wide reliability
 - Notify each BA of the results of the review and request revisions if needed
- Requirement 10—Within 60 calendar days the BA will address any risks identified during the RC review and resubmit to the RC
- Requirement 11—BA performs Seasonal ERA

Requirement Details BAL-008—Perform

- Requirement 12—If ERA identifies any forecast energy emergencies listed below, BA implements the operating plan identified in R3
 - Forecast EEA1 circumstances as defined in EOP-011, Attachment 1, Section B
 - Forecast EEA2 circumstances as defined in EOP-011, Attachment 1, Section B
 - Forecast EEA3 circumstances as defined in EOP-011, Attachment 1, Section B
- Requirement 13—Within seven calendar days the RC notifies other BAs, TPs, and neighboring RCs of an anticipated/forecast operating plan implementation by a BA within the RC footprint

Implementation Timelines

- BAL-007-1 (Near-term ERA)
 - 18 months | R1—R3 | Build the Process
 - 24 months | R4—R5 | Review and Provide to RC
 - 24 months | R6—R10 | RC Review, Performing ERAs
- BAL-008-1 (Seasonal ERA)
 - 18 months | R1—R6 | Build the Process
 - 24 months | R7—R8 | Review and Provide to RC
 - 24 months | R9—R13 | RC Review, Performing ERAs

Next Steps—Planning Standard

- Begin work on the third standard focused on Long-term Planning
- Focused on demand and resources one year out and longer
- Likely contain many of the same elements from near-term and seasonal assessments
- NERC is forming new Standard Drafting Team to create long-term standard
 - Need planners involved in process as the Near-term and Seasonal standards focused on operations.



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