

## Overview

This is a survey for Load Serving Entities (LSE's) in the CAISO BAA footprint to 1) provide 100% RA showings for the year-ahead (2025) timeframe, and 2) provide resource portfolios for mid-term (2026-2028) and long-term (2029-2034) planning horizons. The survey will be collected as part of the RAMPD Working Group and the information will be used by the CAISO Resource Assessment and Planning team for production cost modeling and probabilistic modeling to evaluate RA sufficiency.

### Year-Ahead (2025):

Calculate 100% obligation (Load + Reserves) using your Local Regulatory Authority (LRA) resource counting methodology and Planning Reserve Margin (PRM). Provide projected RA-eligible resource MWs of Net Qualifying Capacity (NQC) to meet LSE obligation for each month of 2025. Assume an average hydro year for hydro resource NQC. The RA values shared should reflect projected estimates. Survey responses are non-binding.

### Mid-term (2026-2028) and Long-term (2029-2034):

The CAISO is looking for resource plans for the remaining nine years consistent with the IRP/Long-Term resource plans LSE's provide to the CPUC via IRP filings or to the CEC. Provide a portfolio of resources to cover load + PRM for the annual peak month of years 2026-2028 (mid-term) and 2029-2034 (long-term). Use your current resource planning assumptions (PRM and counting rules) to develop the portfolios. Assume an average hydro year for hydro resources. Provide nameplate MW's of capacity for each listed resource or the portion of the nameplate under contract if shared with another LSE.

## Data Descriptions

- The survey requests LSE's provide projected RA-eligible resource MW's to cover 100% of LSEs' expected RA requirements (LSEs' gross peak load + PRM)
  - Monthly RA obligation for each month of 2025
  - RA requirements based on forecast annual peak demand for 2026-2034
  - Use the peak demand from the CEC 2023 IEPR forecast in Table 1

Year	CAISO Peak Month
2025	July
2026	September
2027	September
2028	September
2029	September
2030	September
2031	September
2032	September
2033	September
2034	September

**Table 1.** CEC 2023 IEPR forecast annual peak month for CAISO

CAISO Resource ID	Provide the CAISO Resource ID for all existing and any planned resources, if available.
Resource Name	Provide the name for all existing and planned resources, a placeholder name may be used for planned resources.
LSE Share of Installed Capacity	Provide the LSE share of MW, this may be up to the installed capacity or just a portion if shared with other LSE(/s).
COD (MM/DD/YYYY)	Provide the Commercial Operation Date for existing resources and the target online date for planned resources.
Retirement Date/Contract End (MM/DD/YYYY)	Provide an end date if a resource is scheduled to retire or if it is known that it will no longer be available to the LSE. This may be left blank if unknown or not applicable.
Fuel Type	Provide the fuel type of all existing and planned resources. Use the fuel categories from the Master Control Area Generating Capability list (available on OASIS) shown in Table 2. For battery storage resources use "LESR" category and indicate duration in the notes (4hr, 6hr, 8hr, etc).
CAISO queue number	Provide for planned resources, if available.
In CAISO BAA (Y/N)	Put "Y" if the resources is physically located inside the CAISO BAA, put "N" if located outside the CAISO BAA. Indicate in the notes if this is a Firm import or Dynamic Schedule resource.
Notes	Provide any relevant notes on specific resources, for example the battery and solar MW components of a hybrid resource.

**Table 2.** Explanation of data fields requested in the survey

SUN
BIOGAS
BIOMASS
DISTILLATE
GEOHERMAL
HYBD
LESR
NATURAL GAS
OTHER
URANIUM
WASTE TO POWER
WATER
WIND

**Table 3.** Fuel types shown on the OASIS Master Control Area Generating Capability list

**Confidentiality**

- The CAISO will treat resources' contractual status provided under this request as confidential under section 20 of the CAISO tariff.
- The CAISO will only publicly release results aggregated at the CAISO BAA level.

**Survey Frequency**

- The CAISO will determine the frequency of survey after further coordination with other similar surveys/filings required by the CEC and CPUC.
- The goal is to improve the process for requesting information from LSE's.