



California ISO

2024–2025 Transmission Planning Process Phase 3 – Competitive Solicitation

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June 25, 2025

Housekeeping reminders

- This call is being recorded for informational and convenience purposes only. Any related transcriptions should not be reprinted without ISO's permission.
- The meeting is structured to stimulate dialogue and engage different perspectives.
- Please keep comments professional and respectful.
- Please try and be brief and refrain from repeating what has already been said so that we can manage the time efficiently.

Instructions for raising your hand to ask a question

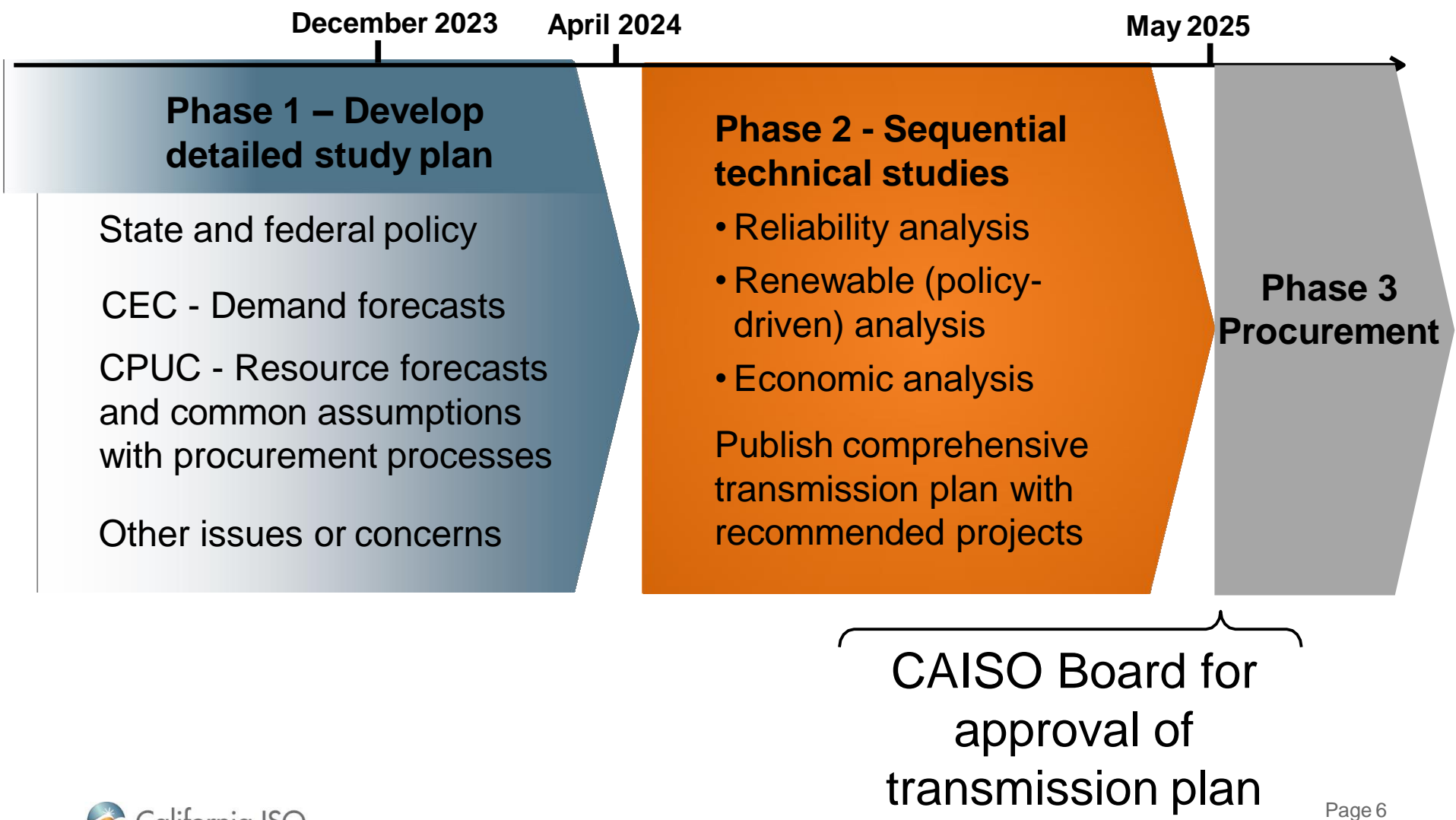
- Open the Participant and Chat panels from the bottom right.
- If you are connected to audio through your computer or used the “call me” option, select the raise hand icon  located at the bottom of the chat panel
 - **Note:** If you dialed in outside of webex, press *3 to get into the question queue
- Please remember to state your name and affiliation before making your comment.
- If you need technical assistance during the meeting, please send a chat to the event producer @Intellor events
- You may also send your question via chat to all panelists.

Transmission Planning Process Phase 3 – Competitive Solicitation Informational Call Agenda

Time	Topic	Presenter
1:00 - 1:10	Welcome and Introductions	Yelena Kopylov-Alford
1:10 – 2:00	<ul style="list-style-type: none">• Competitive solicitation process and schedule• Submission of Project Sponsor applications• Competitive solicitation evaluation approach• Descriptions of projects eligible for competitive solicitation and key selection factors	Kingsley Tenjoh Adalberto Baca-Chavez
2:00 – 2:10	Questions?	
2:10 – 2:20	Wrap-up and next steps	Yelena Kopylov-Alford

COMPETITIVE SOLICITATION PROCESS AND SCHEDULE

2024-2025 Transmission Planning Process



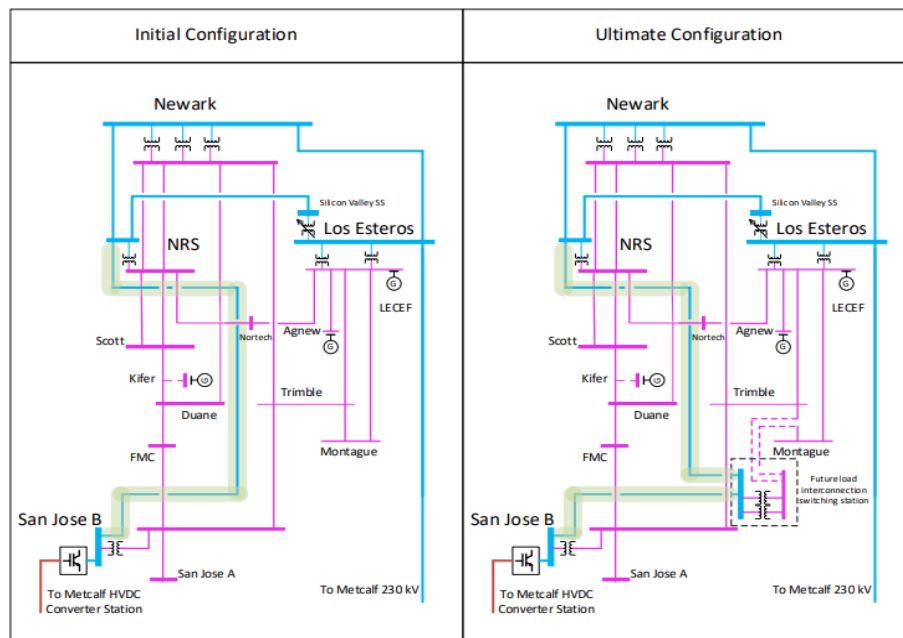
Projects Eligible for Competitive Solicitation in 2024 – 2025 TPP

The ISO has recommended the following reliability-driven projects for approval that are eligible for competitive solicitation:

- **Northern Receiving Station (NRS) - San Jose B 230 kV Line**
- **Manning - Metcalf 500 kV Line**

- **Northern Receiving Station (NRS) - San Jose B 230 kV Line:** An estimated 7-10 mile 230 kV line between the Northern Receiving Station (NRS) and San Jose B.

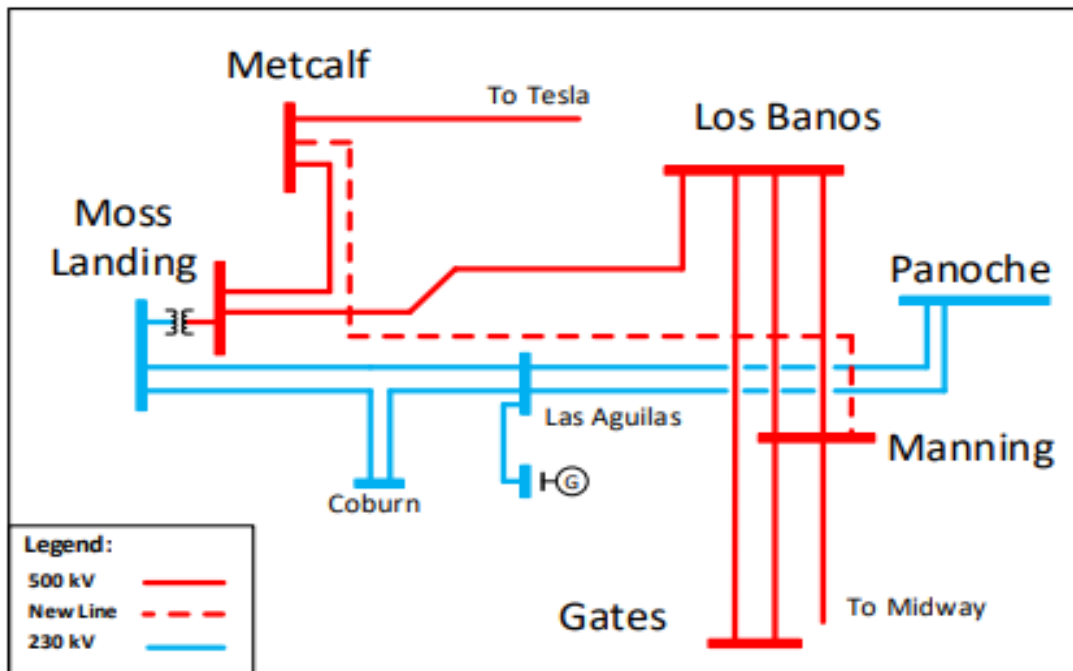
Figure I.2-1: Schematic Diagram of the NRS – San Jose B 230 kV Line Project



Projects Eligible for Competitive Solicitation in 2024 – 2025 TPP

- **Manning - Metcalf 500 kV Line:** Approximately 100 miles of 500 kV AC transmission lines between the Manning and Metcalf 500 kV substations with 70% series compensation.

Figure I.1-1: Schematic Diagram of the Manning – Metcalf 500 kV Line project



Key Steps in the Solicitation and Selection Process

- 1 Post functional specifications and conduct informational conference call
- 2 Solicit Project Sponsor applications
- 3 Receive Project Sponsor applications
- 4 Assess whether Project Sponsors meet minimum qualifications
- 5 Post list of qualified Project Sponsors
- 6 Selection of Approved Project Sponsor
- 7 Post Approved Project Sponsor and Report

Functional Specifications, Informational Conference Call and Q&A Document

- The ISO prepares and posts functional specifications for each transmission solution prior to opening the bid window.
- The ISO will host an informational conference call to address questions on:
 - Schedules
 - Process
 - Application
 - Functional specifications
- Potential Project Sponsors can submit questions during the bid window and the ISO will post answers on the ISO website for all interested parties to view. The ISO refers to this document as the matrix log of questions and answers.

Transmission Planning Process Phase 3 Schedule

- June 25, 2025 – Bid Window Opens
- Opportunity to Collaborate – 10 Business Days (BD)
- Bid Window Closes:
 - **Northern Receiving Station (NRS) - San Jose B 230 kV Line:** An estimated 7-10 mile 230 kV line between the Northern Receiving Station (NRS) and San Jose B. **Bid Window Closes 9/26/2025**
 - **Manning - Metcalf 500 kV Line:** Approximately 100 miles of 500 kV AC transmission lines between the Manning and Metcalf 500 kV substations with 70% series compensation. **Bid Window Closes 10/17/2025**
- Validation – 15 BD
- Cure – 10 BD
- Final Validation – 10 BD
- Qualification – 15 BD
- Cure – 10 BD
- Final Qualification – 10 BD
- Comparative Analysis and select Approved Project Sponsor – 60 BD
- Approved Project Sponsor Selection Posted to the ISO Website:
 - **Northern Receiving Station (NRS) - San Jose B 230 kV Line:** An estimated 7-10 mile 230 kV line between the Northern Receiving Station (NRS) and San Jose B. **March 30, 2026**
 - **Manning - Metcalf 500 kV Line:** Approximately 100 miles of 500 kV AC transmission lines between the Manning and Metcalf 500 kV substations with 70% series compensation. **April 20, 2026**

SUBMISSION OF PROJECT SPONSOR APPLICATIONS

Project Sponsor Application includes the following:

Introduction and General Instructions

1. Project Sponsor Name, Organizational Structure and Proposal Summary
2. Project Qualification
3. Prior Projects and Experience – now an Excel spreadsheet
4. Project Management and Schedule
5. Cost Containment
6. Financial
7. Environmental Permitting and Public Processes
8. Transmission and/or Substation Land Acquisition
9. Substation Design and Engineering
10. Transmission Line Design and Engineering
11. Construction
12. Maintenance
13. Operations
14. Miscellaneous
15. Officer Certification
16. Application Deposit Payment Instructions

Project Sponsor Application Changes for 2024-2025:

Cost and Cost Containment Workbook

- Descriptions to entries to add clarity to submission requirements
 - Depreciation breakouts for depreciable vs. non-depreciable plant
 - AFUDC/ CWIP calculation and assumption details
 - Basis of tax assumptions
 - Miscellaneous small edits/clarifications

Project Sponsor Application

- Application instructions provide guidance on electronic submission of proposals and related documents
- Removal of request for proposal abandonment provisions

Officer Certification

- Officer certifies that he/she has full authority to represent the Project Sponsor or affiliate of the Project Sponsor.
- Officer certifies that the information contained in the application is true, accurate and that there are no material omissions.

Deposit Fee

- Project Sponsor must submit a deposit of \$100,000 with its application.
- Project Sponsor will be responsible for the actual costs that the ISO incurs in qualifying and selecting an Approved Project Sponsor through the competitive solicitation process, including the cost of the retained expert consultants.
- Payment instructions are included in the Project Sponsor application.

COMPETITIVE SOLICITATION EVALUATION APPROACH

Project Sponsor Minimum Qualification Criteria

- The Project Sponsor has assembled (or plans to assemble) a sufficient sized team with the knowledge and skill to design, construct, operate, and maintain the transmission solution.
- The Project Sponsor has sufficient financial resources, including the ability to assume liability from major losses resulting from failure of any part of the transmission solution.
- The Project Sponsor's schedule meets the ISO's requirements, and the sponsor has the ability to meet its proposed schedule.
- The Project Sponsor and its team (or planned team) have the necessary technical and engineering qualifications and experience to design, construct, operate and maintain the transmission solution.
- The Project Sponsor agrees to sign the TCA (Transmission Control Agreement), become a PTO (Participating Transmission Owner), comply with NERC and WECC requirements and standards, and will turn the regional transmission facility over to the ISO's operational control.

Project Proposal Minimum Qualification Criteria

- Whether the proposed design of the transmission solution is consistent with needs identified in the comprehensive Transmission Plan.
- Whether the proposed design of the transmission solution satisfies Applicable Reliability Criteria and ISO Planning Standards.

Project Sponsor Selection Among Qualified Project Sponsors and Proposals

- If only a single Project Sponsor is qualified, that Project Sponsor is automatically selected
- If multiple Project Sponsors are qualified, the ISO, with assistance from qualified expert consultants, will conduct a comparative analysis and select the Approved Project Sponsor.

ISO will use Comparative Analysis to Determine the Approved Project Sponsor

- Selection based on a comparative analysis of the degree to which each Project Sponsor's proposal meets the qualification criteria and selection factors, as set forth in ISO Tariff Section 24.5.4
- Objective is to determine the qualified Project Sponsor which is best able to:
 - Design, finance, license, construct; maintain, and operate the transmission solution in a cost-effective, efficient, prudent, reliable, and capable manner over the lifetime of the transmission solution; while
 - Maximizing overall benefits and minimizing the risk of untimely project completion, project abandonment, future reliability issues, and operational or other relevant problems.

Posting Approved Project Sponsors and Report on Approved Project Sponsor Selection

- The ISO will post the Approved Project Sponsor for each regional transmission solution.
- The ISO will post a detailed report regarding the selection of the Approved Project Sponsor, including a summary of the comparative analysis undertaken.
- The selection report will contain the cost containment information of the Approved Project Sponsor, but no other Project Sponsor.

PROJECT DESCRIPTIONS AND KEY SELECTION FACTORS

Key Selection Factors (Section 24.5.1)

- Section 24.5.1 of the ISO's tariff outlines existing qualification criteria and selection factors, in addition to any binding cost containment commitments, which the ISO believes are key for selecting an Approved Project Sponsor for a particular transmission solution.
- Key selection factors for the transmission solutions eligible for competitive solicitation can be found at:

[Key-Selection-Factors-2024-2025-Transmission-Planning-Process.pdf \(caiso.com\)](#)

To determine the key selection factors for each transmission solution subject to competitive solicitation, the ISO considers:

- (1) the nature, scope, and urgency of the need for the transmission solution;
- (2) expected severity of siting or permitting challenges;
- (3) the size of the transmission solution, potential financial risk associated with the transmission solution, expected capital cost magnitude, cost overrun likelihood, and the ability of the Project Sponsor to contain costs;
- (4) the degree of permitting, rights-of-way, construction, operation, and maintenance difficulty;
- (5) risks associated with the construction, operation, and maintenance of the transmission solution;
- (6) technical and engineering design difficulty or whether specific expertise in design or construction is required;
- (7) special circumstances or difficulty associated with topography, terrain, or configuration;
- (8) specific facility technologies or materials associated with the transmission solution;
- (9) binding cost containment measures, including cost caps;
- (10) abandonment risk; and
- (11) whether the overall cost of the transmission solution impacts the ISO's prior determination of, and inclusion in, the comprehensive Transmission Plan of the more efficient or cost effective solution during Phase 2 of the transmission planning process.

Transmission Solutions for Competitive Solicitation

Northern Receiving Station (NRS) - San Jose B 230 kV Line Project

- Description:** This is a reliability-driven transmission solution where the timing is critical to ensure reliability is maintained in a major portion of the ISO controlled grid, specifically to serve the high load forecast in the San Jose area. The initial project scope includes the NRS - San Jose B 230 kV line, estimated at 7-10 miles depending on routing.

- Estimated Cost:** Approximately \$150 - \$200 million.

- Requested In-Service Date:** June 1, 2030.

- Key Qualification and Selection Factors:**

- Section 24.5.4 (b):** The Project Sponsor's existing rights of way and substations that would contribute to the transmission solution in question.

- Section 24.5.4 (d):** The proposed schedule for development and completion of the transmission solution and demonstrated ability of the Project Sponsor and its team to meet that schedule.

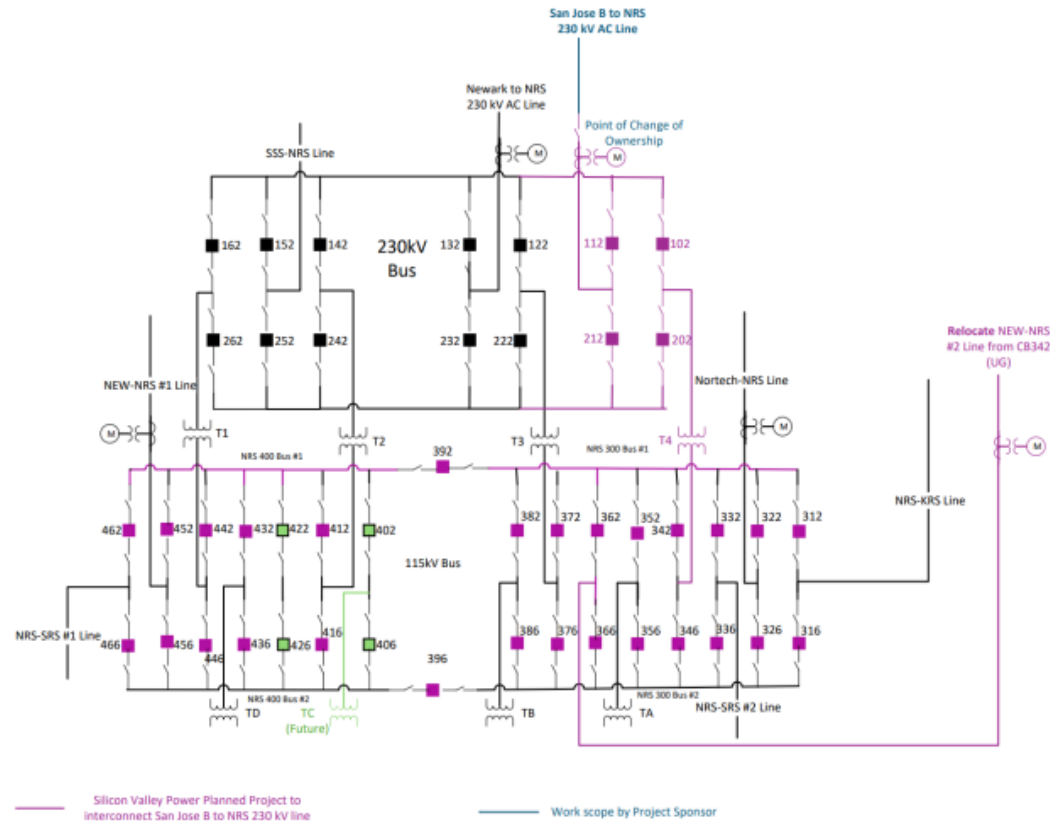
- Section 24.5.4 (e):** The financial resources of the Project Sponsor and its team.

- Section 24.5.4 (j):** Demonstrated cost containment capability of the Project Sponsor and its team, specifically, binding cost control measures the Project Sponsor agrees to accept, including any binding agreement by the Project Sponsor and its team to accept a cost cap. Also, if none of the competing Project Sponsors proposes a binding cost cap, the authority of the selected siting authority to impose binding cost caps or cost containment measures on the Project Sponsor, and its history of imposing such measures.

Transmission Solutions for Competitive Solicitation

Northern Receiving Station (NRS) - San Jose B 230 kV Line Project

Figure I.2-3: Interconnection to NRS 230 kV Substations

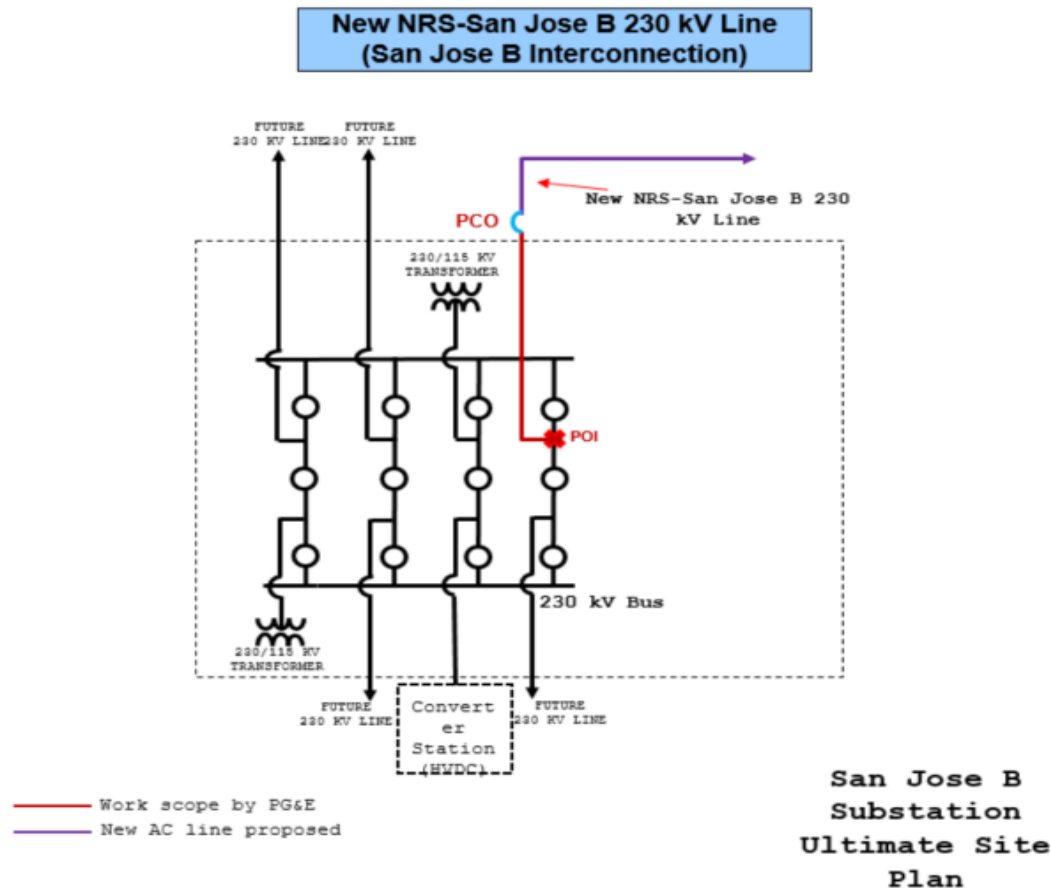


NRS 230 kV Substation Expansion

Transmission Solutions for Competitive Solicitation

Northern Receiving Station (NRS) - San Jose B 230 kV Line Project

Figure I.2-4: Interconnection to San Jose B 230 kV Substation



Transmission Solutions for Competitive Solicitation

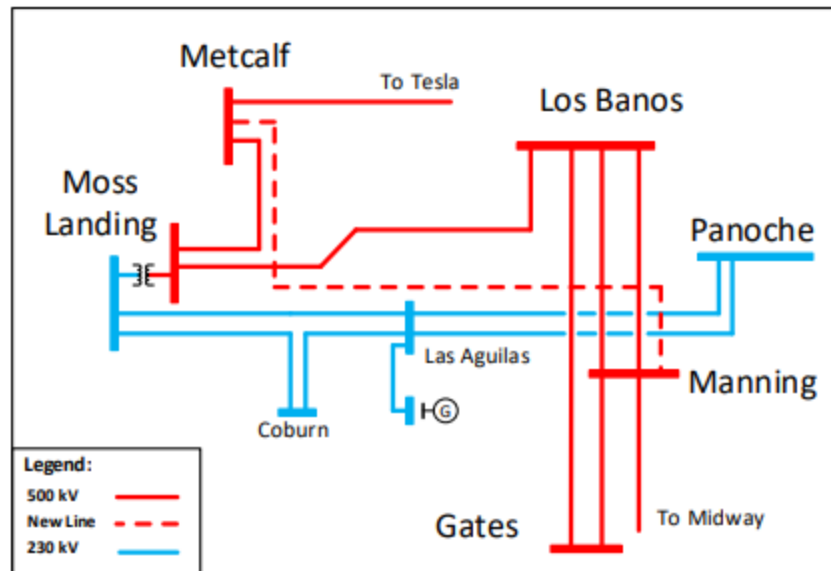
Manning - Metcalf 500 kV Line Project

- Description:** This is a reliability-driven transmission solution critical for maintaining reliability in a major portion of the ISO controlled grid. The project scope includes approximately 100 miles of 500 kV AC transmission lines between the Manning and Metcalf 500 kV substations with 70% series compensation.
- Estimated Cost:** Approximately \$500 - \$700 million.
- Required In-Service Date:** June 1st, 2034.
- Key Qualification and Selection Factors:**
 - Section 24.5.4 (b):** The Project Sponsor's existing rights of way and substations that would contribute to the transmission solution in question.
 - Section 24.5.4 (d):** The proposed schedule for development and completion of the transmission solution and demonstrated ability of the Project Sponsor and its team to meet that schedule.
 - Section 24.5.4 (e):** The financial resources of the Project Sponsor and its team.
 - Section 24.5.4 (j):** Demonstrated cost containment capability of the Project Sponsor and its team, specifically, binding cost control measures the Project Sponsor agrees to accept, including any binding agreement by the Project Sponsor and its team to accept a cost cap. Also, if no competing Project Sponsors propose a binding cost cap, the authority of the selected siting authority to impose binding cost caps or cost containment measures on the Project Sponsor, and its history of imposing such measures

Transmission Solutions for Competitive Solicitation

Manning - Metcalf 500 kV Line Project

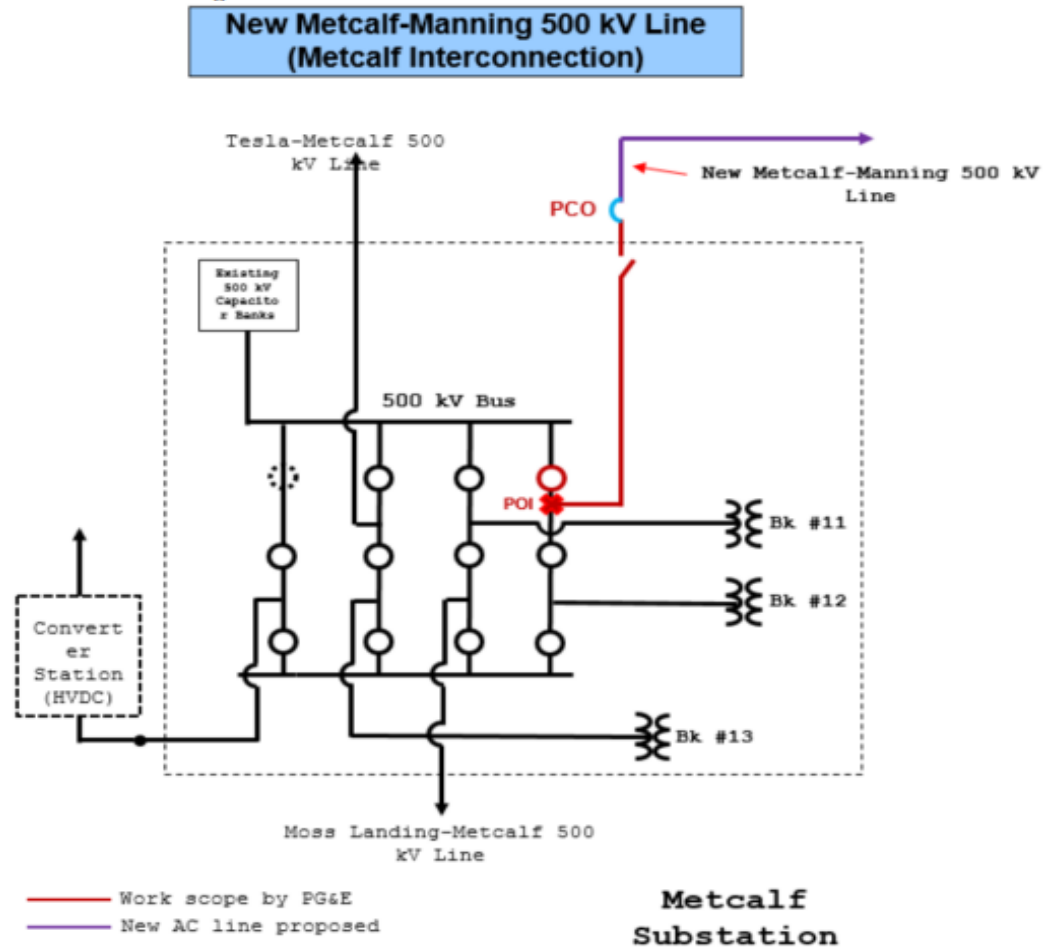
Figure I.1-1: Schematic Diagram of the Manning – Metcalf 500 kV Line project



Transmission Solutions for Competitive Solicitation

Manning - Metcalf 500 kV Line Project

Figure I.1-3: Interconnection to Metcalf 500 kV Substations



Transmission Solutions for Competitive Solicitation

Manning - Metcalf 500 kV Line Project

Figure I.1-4: Interconnection to Manning 500 kV Substations

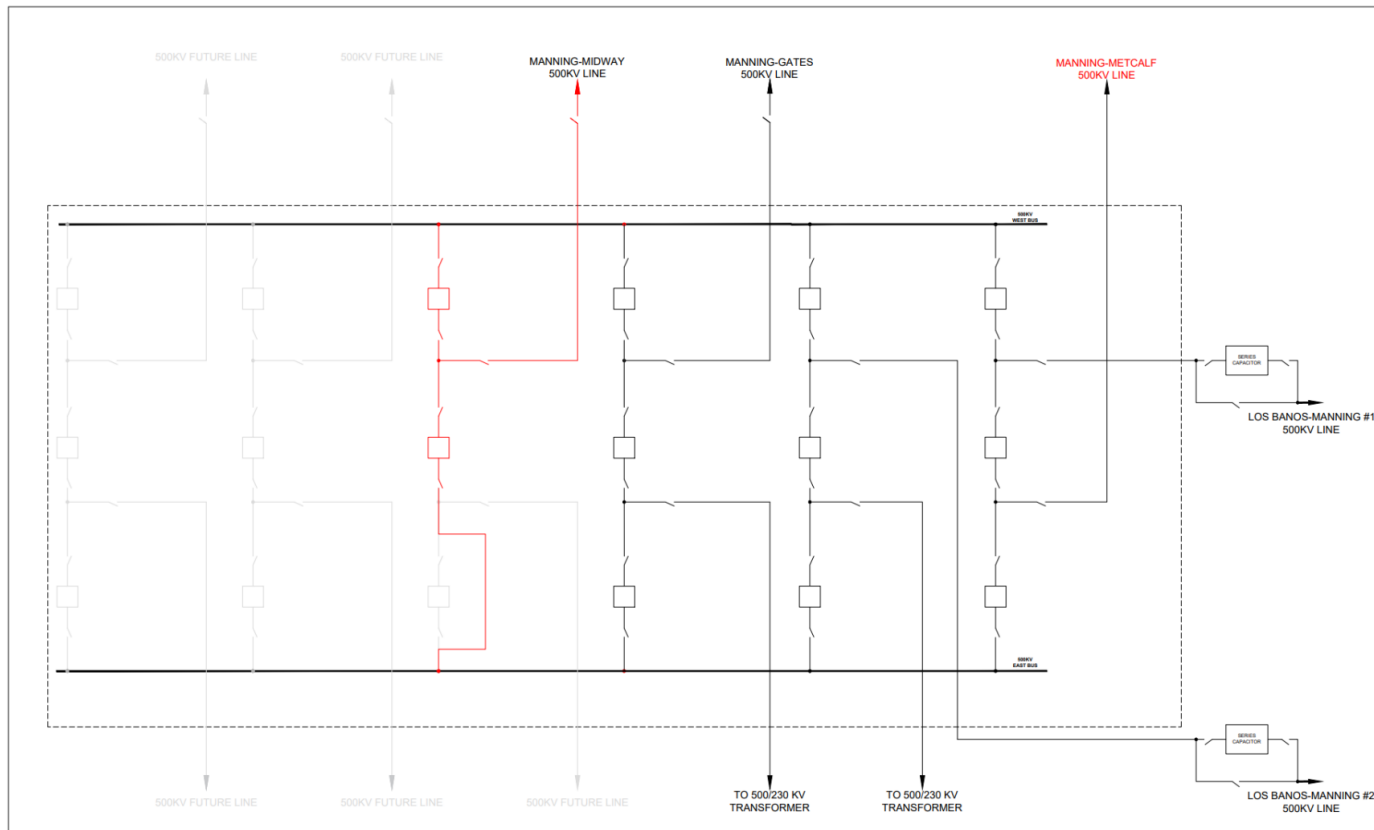


Figure I.1-4 provides a high level diagram of line terminations and interconnection to the Metcalf 500/230 kV substation.

Summary and Next Steps

- Project Sponsor application is posted to the Transmission Planning webpage at:
<http://www.caiso.com/planning/Pages/TransmissionPlanning/Default.aspx>
- Project Functional Specifications are posted to the 2024-2025 Transmission Planning Process webpage at: [2024-2025 Transmission planning process \(caiso.com\)](#)
- Submit completed applications (also questions about the application or specifications) to this email address:
transmissioncompetitivesolicitation@caiso.com
- Questions and associated answers tables (i.e., matrix log of questions and answers) will be posted to the [2024-2025 Transmission Planning Process webpage](#).
- Completed applications (including deposit fee and officer certification signature) are due on or before
 - September 26, 2025 (Sequence 1 - Northern Receiving Station (NRS) – San Jose B 230 kV Line) and
 - October 17, 2025 (Sequence 2 - Manning – Metcalf 500 kV Line)

2024-2025 Transmission Planning Process Phase 3 Sequence Schedule (Due dates)

Sequence Projects		1 st Sequence (San Jose B)	2nd Sequence (Manning)
	Bid Window Open	June 25, 2025	June 25, 2025
	Voluntary notification to ISO of interest in collaboration	July 10, 2025	July 10, 2025
Application Sufficient and Valid	Bid Window Close	September 26, 2025	October 17, 2025
	Validation	October 17, 2025	November 7, 2025
	Cure	October 31, 2025	November 21, 2025
	Final Validation	November 14, 2025	December 9, 2025
	Post List of Valid and Sufficient Project Sponsor Applications	November 14, 2025	December 9, 2025
Proposal and Project Sponsor Qualification	Qualification Questions	December 9, 2025	December 31, 2025
	Cure	December 23, 2025	January 15, 2026
	Final Qualification	January 8, 2025	January 30, 2026
	Post List of Qualified Project Sponsors and Proposals	January 8, 2025	January 30, 2026
	Comparative Analysis	April 6, 2026	April 27, 2026
	Post Approved Project Sponsor	April 6, 2026	April 27, 2026
	Post Selection Report	April 20, 2026	May 11 2026

This Week at the ISO – 06/23/25

Stakeholder Meetings

All public stakeholder meetings are also listed on the [ISO calendar](#):

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Tuesday, June 24th – [Extended Day-Ahead Market Congestion Revenue Allocation - Draft Tariff Language](#)

- 9:00am - 12:00pm PT ([link](#))

- Tuesday, June 24th – [Release User Group Forum](#)

- 10:00am - 11:00am PT ([link](#))

- Tuesday, June 24th – [Interconnection Customer User Group](#)

- 1:00pm - 2:00pm PT ([link](#))

- Wednesday, June 25th – [Ancillary Services Focus Group 3](#)

- 9:00am - 12:00pm PT ([link](#))

- Wednesday, June 25th – [2024-2025 Transmission Planning Process Phase 3 - Competitive Solicitation](#).

- 1:00pm - 2:30pm PT ([link](#))

- Thursday, June 26th – [Market Performance and Planning Forum Q2 meeting on 6/26/25](#)

- 9:00am - 2:00pm PT ([link](#))

- Thursday, June 26th – [Summary of Cluster 15 Intake Scoring Results](#)

- 2:00pm – 4:00pm PT ([link](#))

Comment Submission Deadlines

- Wednesday, June 25th – [Resource Adequacy Modeling and Program Design Track 1](#)

This Week at the ISO continued

Trainings

The ISO encourages market participants to review the new training page on the [Market Participant Portal](#). In addition to the [Training Center](#), this new training page provides Scheduling Coordinators with a centralized location for accessing computer-based training videos (to learn more, please view the [High-Level Overview](#) video).

- None scheduled this week

Market Simulations

Please refer to our [Release Schedule](#) for the most recent updates of initiatives scheduled for MAP- and Production- stage market sims.

Business Practice Manual (BPM) Updates

The status of all PRRs and updated BPMs in the [BPM Library](#) are published on the [BPM Change Management Website](#).

- Tuesday, June 24th – [BPM Change Management Proposed Revision Request Review](#)
 - 11:00am – 12:00pm PT ([link](#))

Important Publications & Announcements (week of 6/16 – 6/20)

[Notice of new market participant as of 6/16/25](#)

[Demand and Distributed Energy Market Integration: Updated working group schedule and discussion paper posted](#)

[Rescheduled: Summary of Cluster 15 Intake Scoring Results call moved to 6/26/25](#)

[Business Practice Manual Change Management call on 6/24/25](#)

[Notice of new market participant as of 6/18/25](#)

[Congestion Revenue Rights \(CRR\) modeling and settlement in the Extended Day-Ahead Market \(EDAM\); comments due 7/3/25](#)

[Ancillary Service Focus Group call on 6/25/25](#)

[Market Performance and Planning Forum Q2 meeting on 6/26/25](#)

[Maintenance Scheduled for California ISO Websites and Reporting Services](#)

ENERGY matters

The California ISO's blog highlights its most recent news releases, and includes information about ISO issues, reports, and initiatives.



Energy Matters blog provides timely insights into ISO grid and market operations as well as other industry-related news.

<https://www.caiso.com/about/news/energy-matters-blog>



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A new way of allocating congestion revenues for EDAM

By ISO Staff

06/19/2025



Story | Operations

Strengthening reliability through year-round gas-electric coordination

By Shawn Grant

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By ISO Staff

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