



California ISO

# 2025-2026 Transmission Planning Process Phase 3 – Competitive Solicitation

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June 24, 2026

# Housekeeping Reminders

- Stakeholder calls and meetings related to Transmission Planning are not recorded.
  - Given the expectation that documentation from these calls will be referred to in subsequent regulatory proceedings, we address written questions through written comments, and enable more informal dialogue at the call itself.
  - Minutes are not generated from these calls, however, written responses are provided to all submitted comments.
- Calls are structured to stimulate an honest dialogue and engage different perspectives.
- Please keep comments professional and respectful.

# Instructions for Raising Your Hand to Ask a Question



If you are connected to audio through your computer or used the 'call me' option, select the raise hand icon located on the bottom of your screen.



If you are connected on the phone line only and not the Webex dial \*3 to be added to the raise hand queue.



Please remember to state your name and affiliation before making your comment.



You may also send question via chat to all panelists.



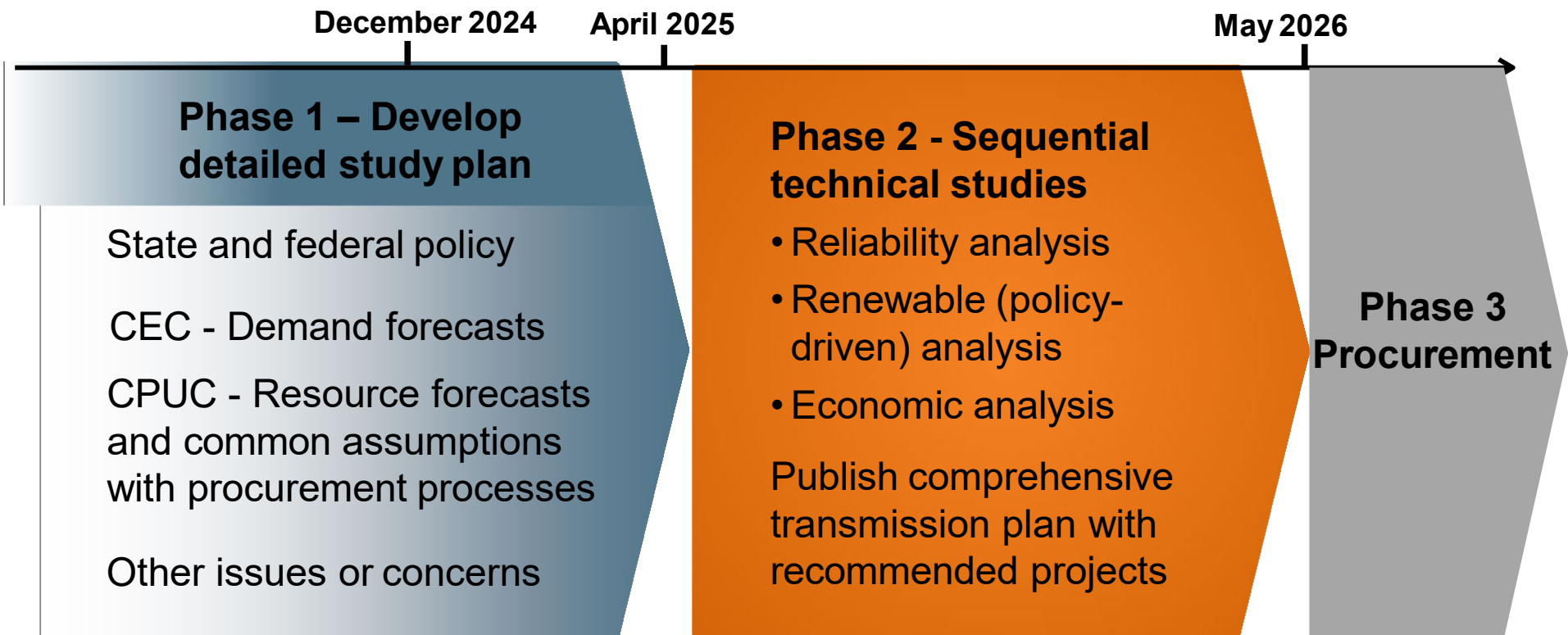
If you need technical assistance during the meeting, please send a chat to the event producer at Intellor Events.

# 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"><li>• Competitive solicitation process and schedule</li><li>• Submission of Project Sponsor applications</li><li>• Competitive solicitation evaluation approach</li><li>• Descriptions of projects eligible for competitive solicitation and key selection factors</li></ul>	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

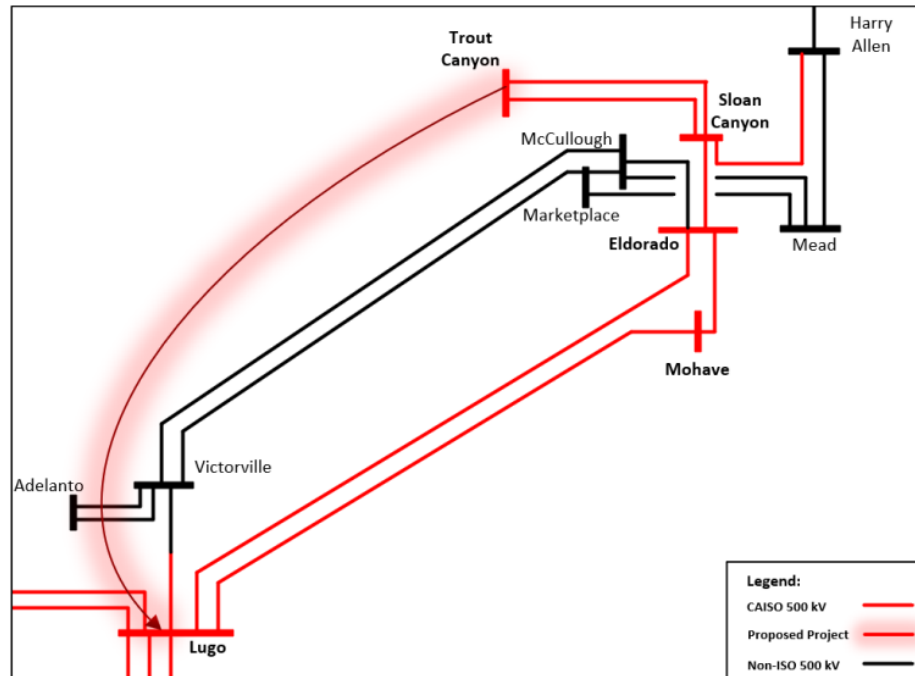
# 2025-2026 Transmission Planning Process



CAISO Board for approval of transmission plan

# Projects Eligible for Competitive Solicitation in 2025 – 2026 TPP

- The ISO has recommended the following policy-driven project for approval that is eligible for competitive solicitation:
  - **Trout Canyon – Lugo 500 kV Line:** An estimated 180-mile 500 kV AC transmission line with 70% series compensation between GLW Trout Canyon and SCE Lugo 500 kV substations



# 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

- Bid Window **Opens June 24, 2026**
- Opportunity to Collaborate – 10 Business Days (BD)
- Bid Window Closes:
  - **Trout Canyon – Lugo 500 kV Line:** An approximately 180-mile 500 kV AC transmission line with 70% series compensation between the GLW Trout Canyon and SCE Lugo 500 kV substations. **Bid Window Closes 9/25/2026**
- 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:
  - **Trout Canyon – Lugo 500 kV Line:** An approximately 180-mile 500 kV AC transmission line with 70% series compensation between the GLW Trout Canyon and SCE Lugo 500 kV substations. **April 5, 2027**

# 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 2025-2026:

## 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

- Financial Section – Minor changes
- Cost Containment Section
  - Would Project Sponsor agree to include in the APSA a cost containment provision requiring Project Sponsor to pay all or a portion of the CAISO's litigation costs if FERC were to reject any request to recover costs above any agreed-to cost cap, pursuant to an express cost cap exclusion or otherwise, such litigation payments to be excluded from Project Sponsor's Transmission Revenue Requirement? Please provide any specific measures to which Project Sponsor would agree.

# 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:

<https://stakeholdercenter.caiso.com/InitiativeDocuments/Key-Selection-Factors-2025-2026-Transmission-Planning-Process-Jun-06-26.pdf>

# 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.

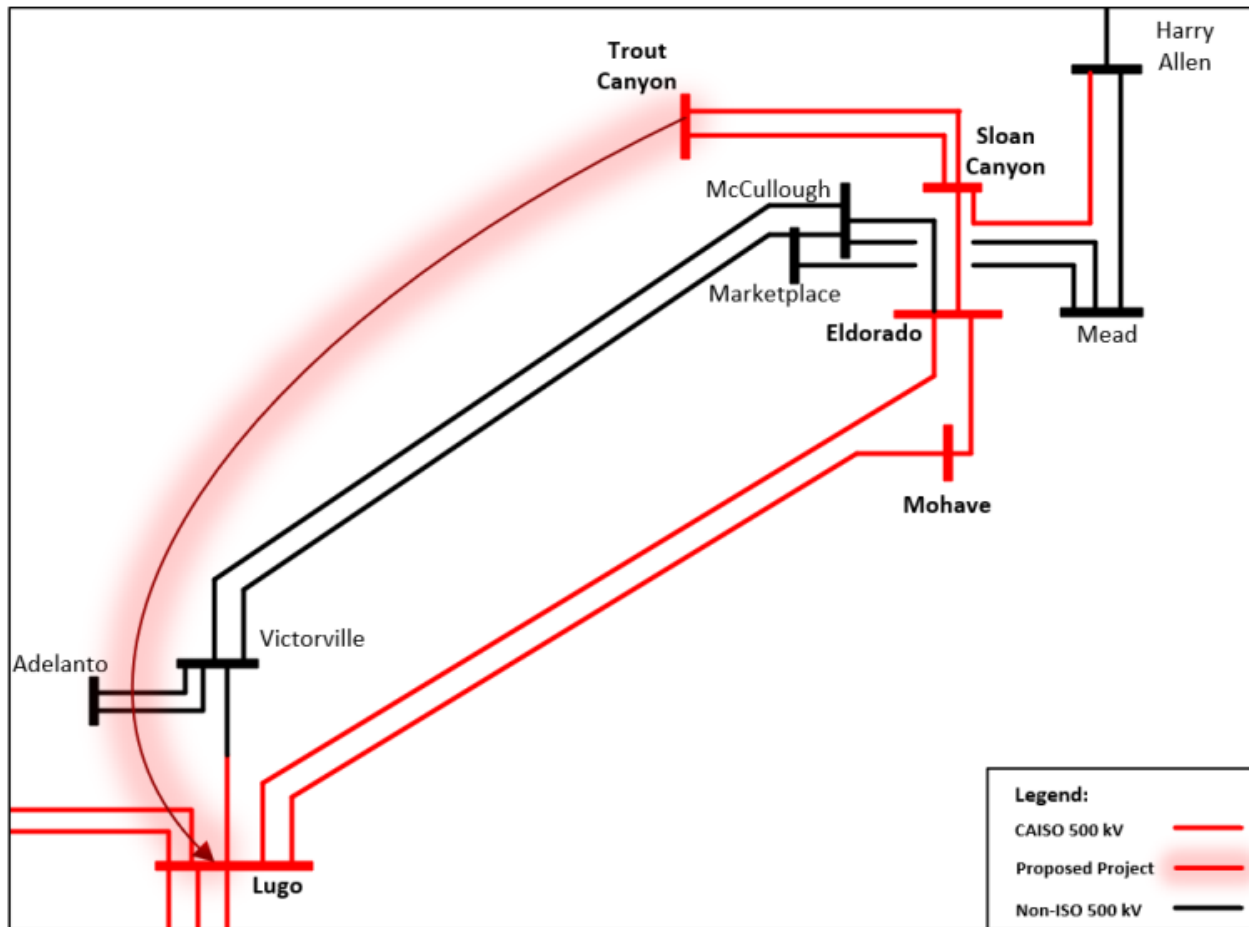
# Transmission Solutions for Competitive Solicitation

## Trout Canyon – Lugo 500 kV Line Project

- This is a policy-driven need for the Trout Canyon – Lugo 500 kV Line. The project scope includes an approximately 180-mile 500 kV AC transmission line with 70% series compensation between the GLW Trout Canyon and SCE Lugo 500 kV substations.
- Estimated Cost: **Approximately \$1,270 - \$1,800 million.**
- Requested In-Service Date: **June 1, 2035.**
- 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 (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 that would preclude costs for the transmission solution above the cap from being recovered through the CAISO's Transmission Access Charge, and, 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

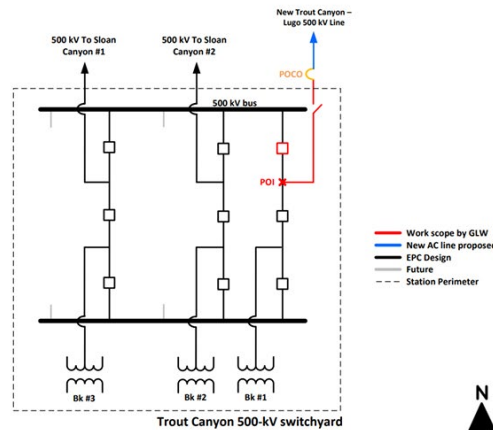
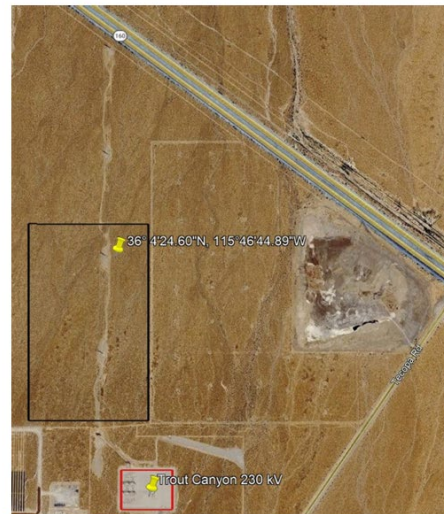
## Trout Canyon – Lugo 500 kV Line Project



# Transmission Solutions for Competitive Solicitation

## Trout Canyon – Lugo 500 kV Line Project

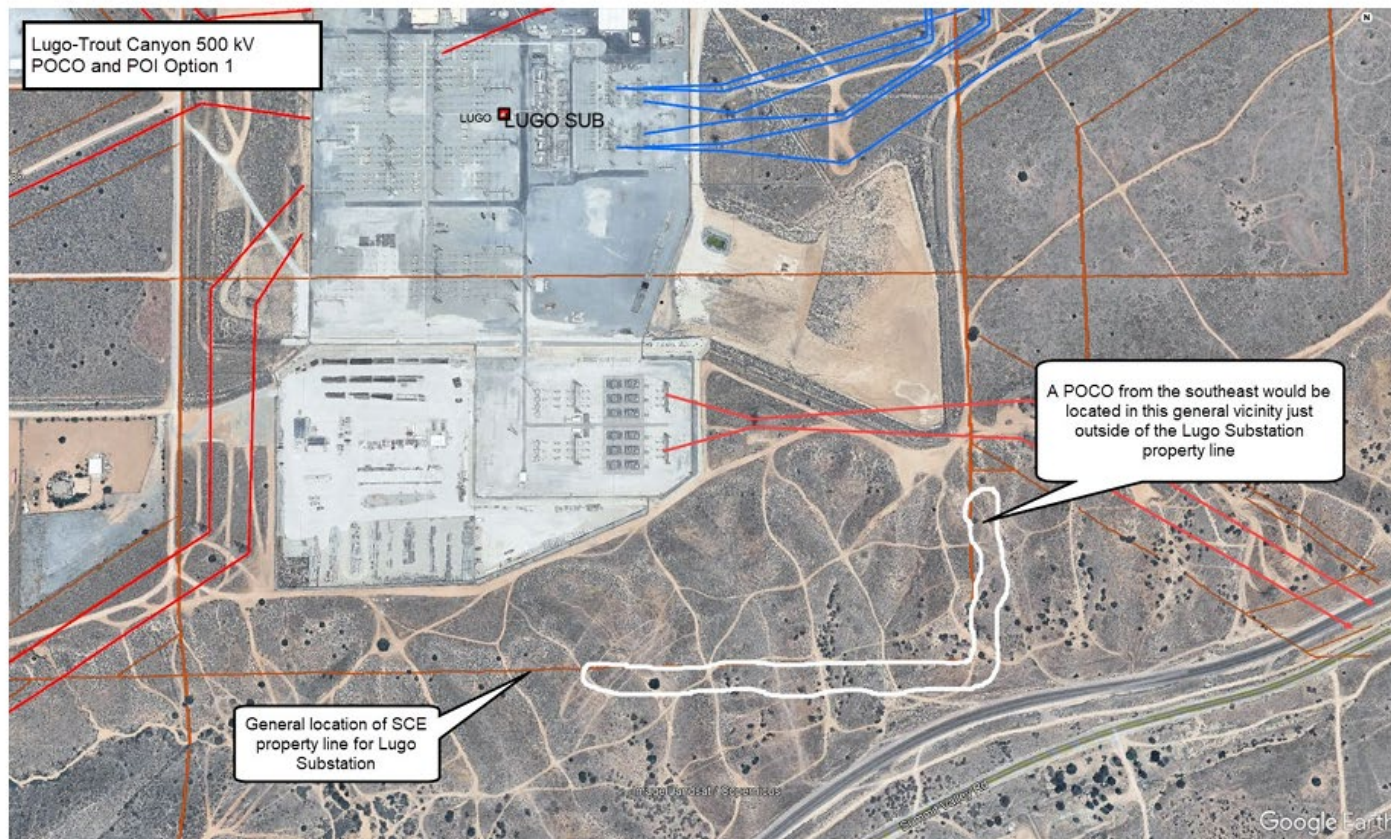
Figure I.1 3: Interconnection to planned Trout Canyon 500 kV Substations



# Transmission Solutions for Competitive Solicitation

## Trout Canyon – Lugo 500 kV Line Project

Figure I.1 2: Interconnection to Lugo 500 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 2025-2026 Transmission Planning Process webpage at: [2025-2026 Transmission Plan - Appendix I](#)
- Submit completed applications (also questions about the application or specifications) to this email address:  
[transmissioncompetitivesolicitation@caiso.com](mailto:transmissioncompetitivesolicitation@caiso.com)
- Questions and associated answers tables (i.e., matrix log of questions and answers) will be posted to the [2025-2026 Transmission Planning Process webpage](#).
- Completed applications (including deposit fee and officer certification signature) are due on or before
  - **September 25, 2026** (Trout Canyon – Lugo 500 kV Line)

# 2025-2026 Transmission Planning Process Phase 3 Sequence Schedule (Due dates)

Sequence		Trout Canyon – Lugo 500 kV Line
Project		Due Date
	Stakeholder call/Bid Window Opens	6/24/2026
	Opportunity to collaborate	7/9/2026
Application Sufficient and Valid	Bid Window closes	9/25/2026
	Validation	10/16/2026
	Cure	10/30/2026
	Final Validation	11/13/2026
	Post list of valid sponsors	11/13/2026
Proposal and Project Sponsor Qualification	Qualification	12/8/2026
	Cure	12/22/2026
	Final Qualification	1/7/2027
	Post list of Qualified Sponsors	1/7/2027
	Comparative Analysis, Select project sponsor	4/5/2027
	Post approved project sponsor*	4/5/2027
	Sponsor Selection Report*	4/19/2027

# This Week at the ISO – 6/22/26

**Stakeholder Meetings** *For an overarching view of where each initiative is in the development process, view the [Policy Initiatives Timeline](#).*

*All public stakeholder meetings are also listed on the [CAISO Calendar](#)*

- Tuesday, June 23 – BPM Change Management Proposed Revision Request Review
  - 11:00am – 12:00pm PT ([Register](#))
- Tuesday, June 23 – Interconnection Customer User Group
  - 1:00pm – 2:00pm PT ([Register](#))
- Wednesday, June 24 – Extended Day-Ahead Market Congestion Revenue Allocation
  - 9:00am – 12:00pm PT ([Add to calendar](#))
- Wednesday, June 24 – 2025-2026 Transmission Planning Process Phase 3 - Competitive Solicitation
  - 1:00pm – 2:30pm PT ([Add to calendar](#))
- Thursday, June 25 – Extended Day-Ahead Market Performance
  - 9:00am – 11:00am PT ([Add to calendar](#))
- Thursday, June 25 – Congestion Revenue Rights Enhancements
  - 1:00pm – 4:00pm PT ([Add to calendar](#))

## **Comment Submission Deadlines**

- Thursday, June 25 – On-Peak Deliverability Assessment Methodology Refinements

# This Week at the ISO continued

## DAME/EDAM Resources

### **FAQ & Training:**

- [EDAM FAQ Guide](#) - Designed to address general EDAM related questions
- [EDAM Training Resources](#) - A comprehensive set of EDAM training materials is available, offered in both instructor-led and computer-based training (CBT) formats. These resources include courses covering:
  - Bids and Base Schedule
  - EDAM Bidding Basic Concepts
  - Scheduling Infrastructure Business Rules (SIBR)
  - EDAM Scheduling Coordinator responsibilities
  - Intertie Scheduling
- [EDAM Business Requirements Specifications](#) - Describes EDAM's business processes and the associated business requirements.
- [DAME Business Requirements Specifications](#) - Describes DAME's business processes and the associated business requirements.
- [EDAM Scheduling Coordinator Decision Matrix](#)

### **Settlements:**

- [Settlements BPM Walkthrough](#)

### **BPMs:**

- [Extended Day-Ahead Market BPM](#)
- [Market Instruments BPM](#)
- [Reliability Requirements BPM](#)
- [Market Operations BPM](#)
- [BPM Change Management Process \(PRRs\)](#)

### **EDAM Stakeholder Initiative:**

- Meeting materials and recordings can be accessed through the stakeholder initiative page [here](#).

# This Week at the ISO continued

## Market Simulations

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

- None Scheduled this week

Presentations and recordings of the Parallel Operations Meeting are posted [here](#).

To participate in the DAME and EDAM Implementation pre-Market Simulation meeting series, please follow these steps:

### **Submit a CIDI Request:**

- Log in to the CAISO Customer Inquiry, Dispute, and Information (CIDI) system.
- Create a new request with the 'Functional Environment' set to "Market Simulation."
- In the request, specify your intent to participate in the DAME & EDAM Market Simulation.
- Include the following information:
  - Market Simulation initiative(s) you will participate in.
  - Any specific resources or systems you plan to test.
  - Contact names and email addresses for coordination.

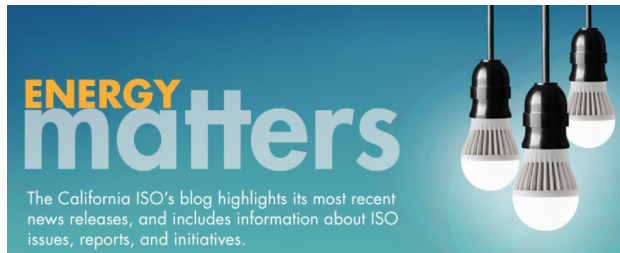
### **Email Option:**

- If you do not have access to CIDI, you may send an email to [marketsim@caiso.com](mailto:marketsim@caiso.com) with the subject line "DAME & EDAM Market Simulation Registration."


### **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](#).
- *Please note: The California ISO has updated how participants access call-in information for Business Practice Manual (BPM) Change Management meetings. Going forward, registration is required to receive Webex and audio participation details. Previously, meeting links were posted directly on the event calendar. This change allows us to collect participant contact information to support future outreach, communication, and process improvement efforts.*

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# Western Energy Markets Observations

This new periodical offers concise and accessible insights into notable developments across the western power markets. [Read the first issue](#) for highlights on market performance during the first weeks of Extended Day-Ahead Market (EDAM) operations.

The document will be posted on the [EDAM Overview page of WesternEnergyMarkets.com](#) website.



**REGISTRATION IS OPEN**

# 2026 STAKEHOLDER SYMPOSIUM

**Welcome reception - Oct. 5**  
at Kimpton Sawyer Hotel, Sacramento, CA

**Symposium program - Oct. 6**  
SAFE Credit Union Convention Center  
Sacramento, CA

Visit: <https://www.caiso.com/meetings-events/events/stakeholder-symposium>

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