



California ISO

ISO Infrastructure Policy Catalog & Roadmap Update

Danielle Mills – Director, Infrastructure Policy Development

Stakeholder meeting

October 15, 2026



California ISO

Housekeeping



This call is being recorded for informational purposes and will be available on the CAISO website. Any related transcriptions should not be reprinted without the ISO's permission.



Today's meeting is designed to encourage open dialogue and diverse perspective. Your participation is valued.



Please engage in a respectful and professional manner.



Please keep comments brief and avoid repeating points already made so we can manage time and ensure everyone has an opportunity to participate.



You can access Closed Captioning and the Transparency Viewer using the controls located at the bottom of the Webex screen.

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 question 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.

Today's Agenda

Time	Topic	Presenter
1:00pm – 3:00pm	Welcome and introductions	Yelena Kopylov-Alford
	• 2026 Infrastructure policy catalog and roadmap schedule • 2027-2029 draft infrastructure policy roadmap • 2027 process preview	Danielle Mills
	Next Steps	Yelena Kopylov-Alford

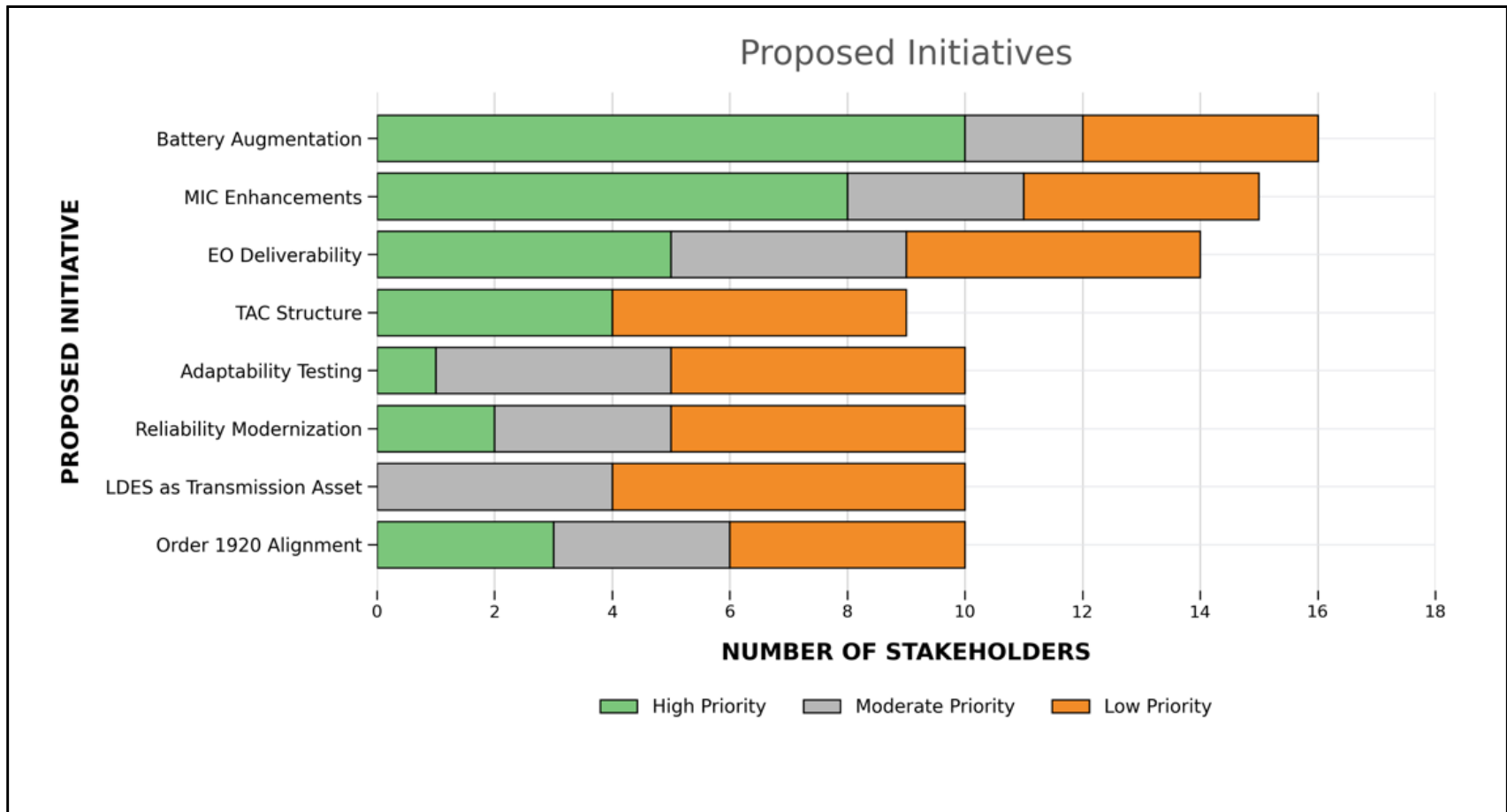
2026 Infrastructure Policy Catalog and Roadmap Schedule

Infrastructure Policy Catalog and Roadmap Process	
January	Kickoff stakeholder meeting
February	Stakeholders submissions to the infrastructure policy catalog
March	
April	Stakeholder workshop
May	Stakeholder comments
June	
July	Publish 2026 Infrastructure Policy Catalog
August	Begin 2027-2029 Infrastructure Policy Roadmap development
September	
October	Publish Draft Infrastructure Policy Roadmap
November	Stakeholder comment period
December	Publish Final Infrastructure Policy Roadmap

The ISO received 8 submissions for consideration in the 2026 Infrastructure Policy Catalog

Organization	Submission Title
Bay Area Municipal Transmission Group (BAMx), California Department of Water Resources, State Water Contractors (3 individual submissions)	Transmission Access Charge (TAC) Structure Enhancements
California Community Choice Association (CalCCA)	Energy-Only Resources Seeking Deliverability
EDF Renewables	Alignment of Interconnection and FERC Order No. 1920
GreenGen Storage	Long Duration Energy Storage (LDES) as a Transmission Asset
NextEra Energy Resources	Streamlined Augmentation of Operational Batteries
Sonoma Clean Power Organization (SCP)	Reliability Modernization Initiative – Align RA Program with Evolving Grid Needs
Sonoma Clean Power Organization (SCP)	Robust Adaptability Testing in CAISO Transmission Planning
The Joint Parties	Maximum Import Capability (MIC) Enhancements

Stakeholders rated relative priorities on policy submissions.



Many topics included in the submissions can be addressed in existing initiatives or processes

Submission	ISO Policy initiative
Streamlined augmentation of operational batteries –	IPE 6.0
Maximum Import Capability	RA modeling and program design initiative
Deliverability for Energy Only resources	IPE 6.0
Alignment of interconnection and Order No. 1920	Order No. 1920 compliance and BPMs, consistent with the MOU.
Reliability credit for grid-charging Energy Only resources	2026-2027 Transmission Planning Process and discussions with CPUC
Robust and Adaptability Testing in CAISO Transmission Planning Process (TPP)	The ISO currently plans for uncertainty and risk in TPP.

Some topics included in submissions are not included in the roadmap.

- No current plans to address through policy initiative
 - Long Duration Energy Storage as a Transmission Asset – will explore with CPUC, however not a new initiative
 - Transmission Access Charge (TAC) enhancements – developing better communications, monitoring CPUC ratemaking proposal and FERC large load action

ISO additions to the 2027-2029 Infrastructure Policy Roadmap

- Transmission planning and MOU coordination
- Large load interconnection and study
- Interconnection process enhancements
 - Note that the ISO is not committed to annual enhancements
- Resource Adequacy Modeling and Program Design
- Compensation for reactive power from IBRs outside of specified range

2027-2029 Draft Infrastructure Policy Roadmap

October 14, 2026

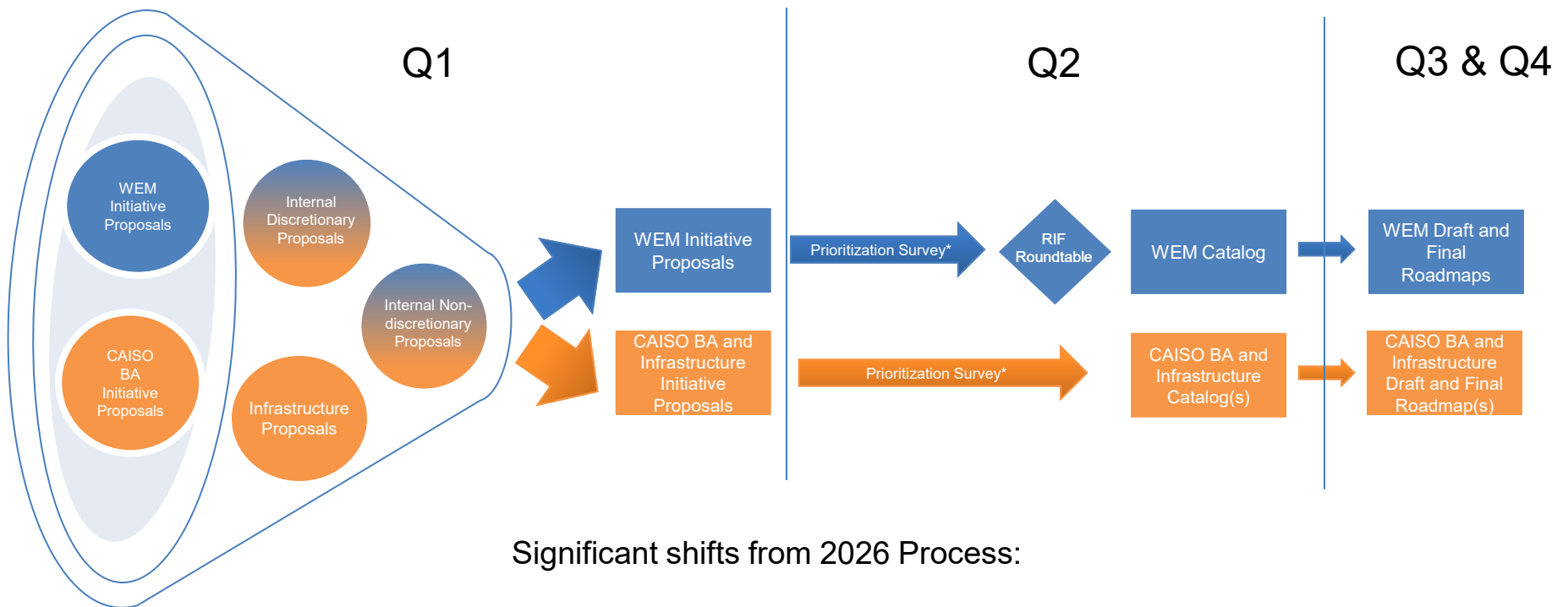
2027-2029 California ISO Infrastructure Policy Initiatives Roadmap														
		2026	2027				2028				2029			
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Transmission Planning and MOU Coordination														
	Order No. 1920 Implementation		Implementation											
	Transmission timeline completion	Ongoing public dialogue												
	MOU update	Policy development				Implementation								
Large Load Interconnection and Study														
	Order to Show Cause 205 filing	Policy development		Decision	Implementation									
	Consideration of permanent flexible interconnection and proximate loads		Policy development		Decision	Implementation								
	Consideration of risk-mitigating curtailment		Policy development		Decision	Implementation								
Interconnection Process Enhancements														
	IPE 6.0 (Prior to Cluster 17)	Policy development		Decision	Implementation									
	IPE 7.0 (if needed)				Policy development		Decision	Implementation						
	IPE 8.0 (if needed)							Policy development			Decision	Implementation		
Resource Adequacy Modeling and Program Design														
	Track 5: MIC enhancements	Policy development		Decision	Implementation									
Compensation for reactive power from IBRs outside of specified range			Public dialogue			Policy development								

NOTE: All implementation dates listed are "no sooner than"

Stakeholder comment period open through November 16.

- Comments accepted via stakeholder comment tool.
 - Registration required to view questions and submit responses.
- Describe your organization's support for the draft 2027-2029 infrastructure policy roadmap.
- Indicate whether your organization has the resources and capacity to support participation in the portfolio of policy initiatives outlined in the draft 2027-2029 infrastructure policy roadmap.
- Provide process feedback where applicable, including on the proposed 2027 roadmap process.

Proposed 2027 roadmap process



Significant shifts from 2026 Process:

- Single intake for all submittals
- A separate roadmap for Western Energy Markets initiatives
- ISO BAA and infrastructure initiatives potentially in a single catalog and roadmap

*Prioritization surveys do not include non-discretionary initiative proposals.

Next Steps

- **November 16:** Stakeholder comment deadline
- **Late November:** Final 2027-2029 infrastructure policy roadmap released
- **December 1:** Stakeholder meeting
- **December 10:** Present final roadmap to ISO Board of Governors

Next Steps

- Comments on the Draft 2027-2029 Infrastructure Policy Roadmap and today's meeting discussion are due by end of day on November 16, 2026
- Questions? Please email ISOStakeholderAffairs@caiso.com
- Additional information on this process is available on the CAISO website at:
<https://stakeholdercenter.caiso.com/RecurringStakeholderProcesses/2026-Infrastructure-policy-catalog-and-roadmap-process>

This Week at the ISO – 10/12/26

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, October 13, 2026 – [Release User Group Forum](#)
 - 10:00am – 11:00am PT ([link](#))
- Tuesday, October 13, 2026 – [Interconnection Customer User Group](#)
 - 1:00pm – 2:00pm PT ([registration link](#))
- Wednesday, October 14, 2026 – [Congestion Revenue Allocation \(CRA\) Phase 1 Settlements Overview](#)
 - 9:00am – 10:00am PT ([registration link](#))
- Wednesday, October 14, 2026 – [WECC Interchange Tool Working Group \(WITWG\)](#)
 - 10:00am – 1:00pm PT ([link](#), [registration link](#))
- Thursday, October 15, 2026 – [Transmission Maintenance Coordination Committee Meeting - Oct 15, 2026](#)
 - 9:00am – 1:00pm PT
- Thursday, October 15, 2026 – [Market Update](#)
 - 10:00am – 10:30am PT ([link](#))
- Thursday, October 15, 2026 – [2026 Infrastructure Policy Roadmap and Catalog](#)
 - 1:00pm – 3:00pm PT ([link](#))
- Friday, October 16, 2026 – [Resource Adequacy Modeling and Program Design \(RAMPD\) Track 2](#)
 - 9:00am – 4:00pm PT ([link](#))

Comment Submission Deadlines

- Tuesday, October 13 – [BPM Proposed Revision Requests \(PRR\) 1687-1709](#)
- Tuesday, October 13 – [Extended Day-Ahead Market \(EDAM\) Performance Meeting](#)
- Wednesday, October 14 – [Congestion revenue rights enhancements](#)
- Thursday, October 15 – [Large Loads - Draft final proposal and draft tariff language](#)

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](#)
- Known Issues List

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

Trainings

- None scheduled this week

Who should attend?

- This course is designed for EDAM and WEIM market participants, particularly entities impacted by the Washington State GHG changes. The intended audience includes policy staff, marketers responsible for submitting GHG bids, and staff responsible for resource modeling.

What topics will be covered?

- This training will include the following topics:
- Describe the GHG Market Model and upcoming geographic boundary changes.
- Explain the purpose and role of the GHG Handbook.
- Summarize GHG bid eligibility, verification, mapping, and submission requirements.
- Identify initial modeling and technical preparations for implementation.
- Recognize upcoming outreach and opportunities for continued engagement.

Market Simulations

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

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

Submit a CIDI Request:

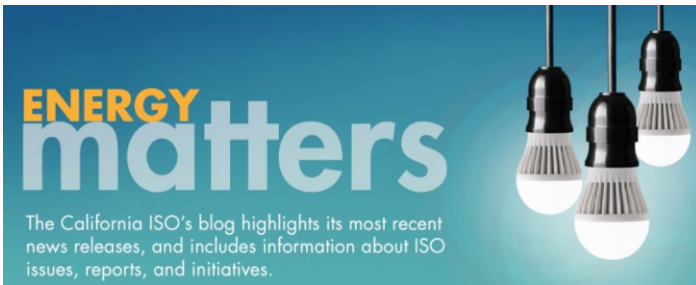
- Log in to the CAISO Customer Inquiry, Dispute, and Information (CIDI) system.
- Create a new request with the 'Functional Environment' set to "Market Simulation."
- In the request, specify your intent to participate in the DAME & EDAM Market Simulation.
- Include the following information:
 - Market 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:

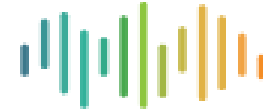
- If you do not have access to CIDI, you may send an email to marketsim@caiso.com with the subject line "DAME & EDAM Market Simulation Registration."

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](#).



Listen and subscribe:   



FREQUENCY BAND

The *Energy Matters* blog provides timely insights into ISO grid and market operations as well as other industry-related news and a new energy podcast, *Frequency Band*.



Story | Western Energy Markets, Markets, Extended Day...

CAISO and Portland General Electric prepare for EDAM Go-Live

By Dr. Khaled Abdul-Rahman

09/29/2026



Story | Transmission

SWIP-North construction underway; provides key link in Western transmission connectivity

By ISO Staff

09/16/2026



Story | Leadership

ISON: A valuable network for international information sharing, innovation and best practices in grid management

By Elliot Mainzer

09/03/2026

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Announcing the launch of a new publication series:



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.