



California ISO

# EDAM Congestion Revenue Allocation Phase 2 – Stakeholder Working Group Meeting

July 28, 2026

# Housekeeping



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The meeting is structured to stimulate dialogue and engage different perspectives.



Please engage in a respectful and professional manner. Introduce yourself and your organization when speaking. Follow the facilitator's guidance for speaking or asking questions.



Please keep comments brief and avoid repeating points already made to ensure everyone has an opportunity to participate in a robust discussion.



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



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



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. Start speaking a couple of seconds after you're unmuted.



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



You may also send questions via chat to all panelists.

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

# Agenda

| Time                | Topic                                 | Presenter         |
|---------------------|---------------------------------------|-------------------|
| 9:00 – 9:05 AM      | Welcome                               | Christina Guimera |
| 9:05 – 9:30 AM      | Meeting Objectives and Introduction   | CAISO Team        |
| 9:30 – 11:45 AM     | Design Concepts & Analysis Discussion | CAISO Team        |
| 11:45 AM – 12:00 PM | Next Steps                            | Christina Guimera |

# Meeting Objectives

- Review and recap trajectory of working group discussions to date and design concepts under considerations
- Discussion on design *Concept #1* – design structure, implementation feasibility, impacts, and remaining policy design questions
- Analysis on transmission constraints effects across a broader EDAM footprint
- Continuing to shape potential design structure of *Concept #3* – design structure for modeling OATT rights and CRR inputs into common SFT, processes and key questions

## Overview of *Congestion Revenue Allocation* design in EDAM today

- In Phase 1 of the initiative, the ISO and stakeholders evaluated a design for parallel flow congestion revenue allocation among EDAM balancing areas.
- The Phase 1 design is transitional, and establishes:
  - Congestion revenue resulting from internal transmission constraints is allocated to the EDAM balancing area where the constraint is located
  - (New) Congestion revenue resulting from parallel flow associated with the exercise of eligible firm OATT transmission rights through a balanced self-schedule is allocated to the EDAM balancing area where the transmission rights are exercised
- The EDAM entity sub-allocates the congestion revenues under the terms established within their OATT.

## EDAM Congestion Revenue Allocation: Phase 2 – Initiative Scope

- The EDAM go-live design for congestion revenue allocation (Phase 1) is considered transitional, allowing for evaluation of near-term enhancements and a long-term durable design.
- Key issues to address when evaluating Phase 2 designs:
  - Eliminating or reducing self-schedule incentives, supporting efficient market outcomes
  - Creating further symmetry in allocation of congestion revenues resulting from parallel flows for the CAISO balancing area resulting from the transitional (Phase 1) design

## Recap of prior working group meetings focused on design concepts

- During the April and May working group meetings, the group focused on identification of potential design concepts to be vetted and shaped further through discussions.
- Three design concepts discussed:
  - *Concept #1* – incremental enhancement to existing EDAM design to provide a congestion revenue allocation to EDAM entity based on balanced cleared schedules associated with OATT rights (and comparable allocation to CAISO area for CRRs).
  - *Concept #2* – establish historical baseline of OATT rights and CRRs which may be eligible for broader congestion revenue entitlement on each other systems.
  - *Concept #3* – congestion revenue entitlements for OATT rights and CRRs based on the results of a common simultaneous feasibility test.

# Recap of prior working group meetings focused on design concepts

- Stakeholder feedback varied across the different concept designs.
- Feedback on **Concept #1**:
  - While split on its value, stakeholders generally supported consideration as a potential incremental improvement to the existing design that can provide a further bridge toward a long-term design.
  - Interest in understanding implementation feasibility and lift to determine if worth pursuing.
- Feedback on **Concept #2**:
  - Broad opposition to any design that limits allocation based on historical rights or uses.
  - In a dynamically changing Western grid where flows can change significantly, basing allocation on historical uses or volumes unreasonably limits ability to effectively hedge.
- Feedback on **Concept #3**:
  - Broad support from stakeholders for continued evaluation as a potential long-term design.
  - Recognition that details will be key to an effective design and there may be different variations in design structure that need to be considered.



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Design Concept #1 – Congestion revenue allocation  
based on cleared balanced schedules

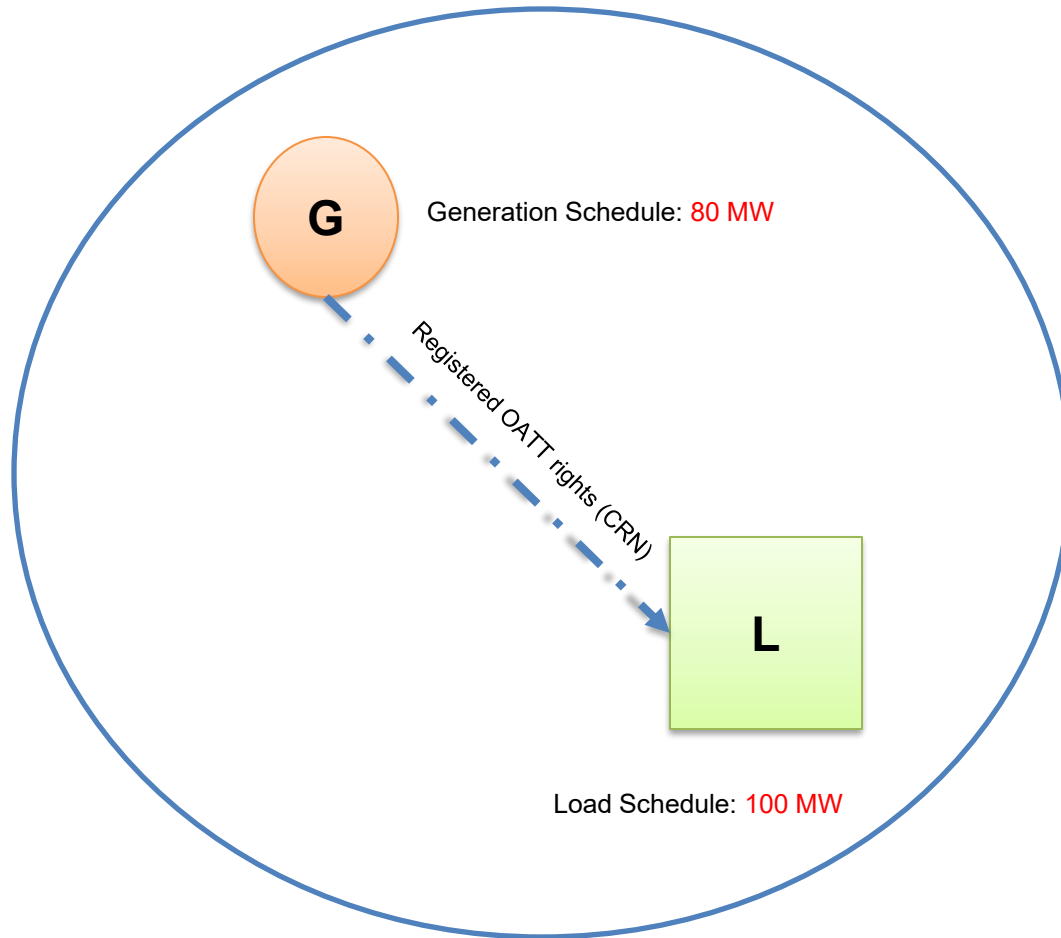
# Concept #1 – Allocation Based on Cleared Balanced Schedules

- Concept #1 congestion revenue allocation design:
  - Congestion revenues are allocated to the EDAM entity in whose balancing area the transmission constraint is located; and
  - EDAM entity receives additional congestion revenues resulting from constraints in another EDAM balancing area for cleared balanced schedules associated with firm OATT transmission rights;
    - Reciprocal treatment for CAISO balancing area: allocated congestion revenues resulting from constraint in EDAM area impacting CRRs
- Concept #1 provides:
  - Eligibility for congestion revenue allocation associated with economic bids based on balanced schedules (associated with firm OATT transmission rights)
  - Creates symmetry in allocation for the CAISO balancing area associated with constraints located in another EDAM balancing area to fund CRRs

## Concept #1 – Application to EDAM Entity & OATT Transmission Rights

- An EDAM entity would be allocated congestion revenues arising from a transmission constraint within its balancing authority area.
- Additionally, the EDAM entity would be allocated congestion revenues associated with a constraint in another EDAM balancing area for the cleared balanced schedules at source/sink locations associated with eligible firm OATT transmission rights.
  - To the extent the constraint affects the LMP at the source/sink locations of the transmission rights
- Eligible OATT transmission rights consistent with the existing design:
  - Long-term firm PTP and NITS transmission
  - Monthly firm PTP and NITS transmission

# Illustrative Example of Concept #1 – OATT Transmission Rights



- Generator (G) holds an 80 MW Firm OATT (PTP or NITS) reservation to serve Load (L).
- Based on its bids, G clears the market at 80 MW.
- Based on its bid in the market, L clears at 100 MW.
- The balanced portion of the schedules, associated with source/sink location of registered OATT rights, is 80 MW.
- Congestion hedge, including parallel flow component, provided for the balanced portion of 80 MW.

## Concept #1: Application to CAISO balancing area and CRRs

- Under *Concept #1*, Congestion Revenue Rights (CRRs) in the CAISO balancing area would be funded by all constraints across the EDAM footprint.
  - Today, CRRs are funded only by constraints within the CAISO balancing area
- Binding transmission constraints in an EDAM balancing area can contribute to congestion in the CAISO balancing area with an effect on the LMP at source/sink locations.
  - These congestion revenues, stemming from a constraint in another balancing area with an effectiveness on LMPs within the CAISO balancing area, will be part of the CRR balancing account funding CRRs
- CRRs, as financial instruments, are not based upon or associated with cleared market schedules.

# What are the potential practical effects of Concept #1?

- *Does not meaningfully reduce the incentive to self-schedule to derive congestion revenue*
  - Under favorable conditions, market participants may still be incented to self-schedule or economically bid at the economic floor to clear the market and derive a congestion revenue allocation (more complete hedge based on balanced portion)
- *Potential shifts in congestion revenue allocation compared to current design*
  - Current design bases allocation on exercise of firm OATT rights based on self-schedules
  - Concept #1 broadens the allocation to cleared balanced schedules (whether economic bid or self-scheduled) associated with firm OATT rights and provides commensurate allocation to CAISO balancing area based on EDAM transmission constraints
  - Allocation is nevertheless still limited by the volume of eligible transmission rights

## Does Concept #1 improve upon the existing EDAM design?

- **Symmetry** in allocation between EDAM entities with OATT rights and CAISO balancing area with CRRs.
  - Enables allocation to both EDAM entities and CAISO balancing area for constraints outside its balancing area
- Ability to **economically bid**, associated with the firm OATT transmission rights, and receive congestion revenue allocation based on cleared balanced day-ahead schedules.
  - Have option to economically bid and not just self-schedule to derive allocation
- Practical implications for EDAM entities:
  - Similarity to current design, providing stability and predictability for new entrants
  - General compatibility with existing sub-allocation designs under OATTs

# Concept #1 Implementation Effort – Initial Assessment

- Currently, system identifies transmission right use via multiple self-schedules associated with CRN
- System identification needs to be expanded with multiple energy bid sections associated with CRN, stacked by priority
  - MSGs have self-schedules in only one configuration, but energy bids in multiple configurations
- EDAM entity and SC systems need to be upgraded to support energy bid section associated with CRNs
- MQS/Settlements/CRR-1B need to identify balanced transmission right use by allocating the schedule/meter to CRN self-schedule/energy bid segments globally by CRN priority
  - Complex sequential rules; performance issue; non-transparent outcome that depends on the sequence; non-robust outcome (may differ across intervals even with same data)
- MQS needs access to meter data and should run on settlement timeline (entire system must be reconfigured)
- MQS needs to support multiple new Optimal Energy portions associated with CRNs
- Implementation risk is extremely high
- Concept #3 may have a lower implementation effort than Concept #1

## Policy question Concept #1 – Treatment of ETC/TORs

**Should ETC/TORs also be eligible for allocation of congestion revenues/hedge based on cleared balanced schedules (whether economically bid or self-scheduled)?**

- Today, ETC/TORs receive a congestion hedge only when self-scheduled.
  - Afforded a market clearing priority and first allocation of congestion revenue to provide a complete congestion hedge
- The ISO settles congestion revenues directly with scheduling coordinator representing ETC/TOR schedules in the market, in CAISO and EDAM areas.
- *Comparability* - allocation of congestion revenues to ETC/TOR rights holders that economically bid based on balanced cleared schedules (associated with the ETC/TOR source and sink locations) would provide comparability to flexibility afforded to OATT rights.

# Policy question Concept #1 – Bid Cost Recovery (BCR)

**Should congestion revenues derived based on economic bids (associated with OATT rights and ETC/TORs) be considered as part of the derived market revenues within the BCR process?**

- The BCR process compares a resource's total submitted market bid costs against its total revenues derived through the market across day-ahead and real-time market revenues.
- Revenues derived through CRRs are not considered in BCR as these are separate hedging financial instruments not influenced or based upon market schedules.
- Under *Concept #1* congestion revenues allocated to **ETC/TOR** holders based on cleared balanced schedules should they be accounted for in BCR for economic bids?
  - Congestion revenues are directly allocated by the market operator to the scheduling coordinator
- Under *Concept #1* congestion revenue allocated to EDAM entity for cleared balanced schedules associated with **OATT rights**, should they be accounted for in BCR for economic bids by a scheduling coordinator?
  - Congestion revenues are allocated by market operator to EDAM entity (not scheduling coordinator), who sub-allocates to the transmission customers under its OATT
  - Transmission customer under OATT may not be the same as the scheduling coordinator bidding in market

# Policy question Concept #1 – Allocation of Congestion Revenues in the Real-Time Market

## **How should congestion revenues be allocated in the real-time market under Concept #1 design?**

- Concept #1 design is focused toward providing a congestion hedge framework in the Day-Ahead Market based on location of constraint and schedules associated with firm OATT rights.
- In the Real-Time Market, which includes WEIM-only participating balancing areas, how should congestion revenues be allocated?
  - Retain status quo in real-time: all congestion revenues allocated to the balancing area where the constraint is located
  - Extend allocation for ETC/TOR balanced cleared schedules?



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# Congestion cost analysis for future EDAM footprint

Guillermo Bautista Alderete

Director, Market Performance & Advanced Analytics



California ISO

Concept #3 – Congestion revenue entitlements based on transmission rights evaluated through a common Simultaneous Feasibility Test (SFT)

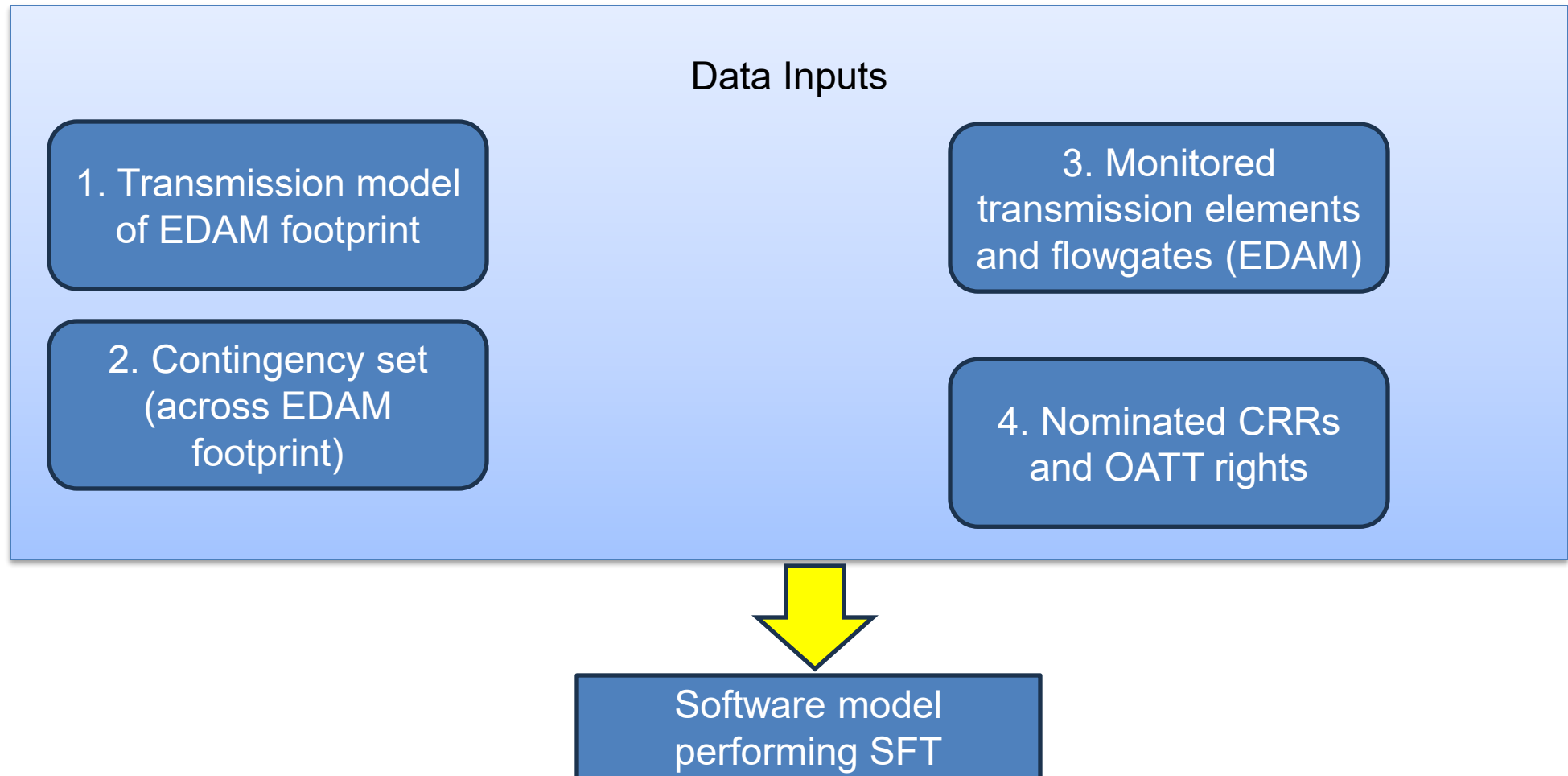
## Concept #3 – Congestion revenue entitlements for CRRs and OATT rights evaluated through a common Simultaneous Feasibility Test (SFT)

- Establishes congestion revenue entitlements in the Day-Ahead Market for CRRs and eligible firm OATT rights based on their effectiveness on constraints across the broader EDAM footprint.
- The CRRs and eligible firm OATT rights are evaluated through a common SFT which defines the level of congestion revenue entitlement in relation to effectiveness on constraints.
- Day-Ahead congestion revenues in excess of those allocated to CRRs and eligible firm OATT transmission rights would be allocated to the EDAM entity based on the location of the transmission constraint.
- Real-Time congestion revenues would be allocated to the EDAM entity based on the location of the transmission constraint.

# What is a Simultaneous Feasibility Test (aka SFT)?

- SFT is a power-flow analysis to assess feasibility of flow associated with transmission rights considering transmission limits and constraints of the grid.
- Key elements of the SFT:
  - *Modeling of constraints* – considers the network model of the EDAM footprint, reflecting the transmission constraints
  - *Transmission limits* – considers, based on the incorporated transmission rights and their flow effects, that these do not overload the physical limits of the transmission system
  - *Feasibility assessment* – to the extent that all the transmission rights inputs are not simultaneously feasible, the process reduces or adjusts the volumes to reach system feasibility
- Currently, the ISO conducts the SFT on an annual and monthly basis to test feasibility of congestion revenue rights (CRR).

# Inputs into a common Simultaneous Feasibility Test



# Visualizing the SFT inputs and outputs

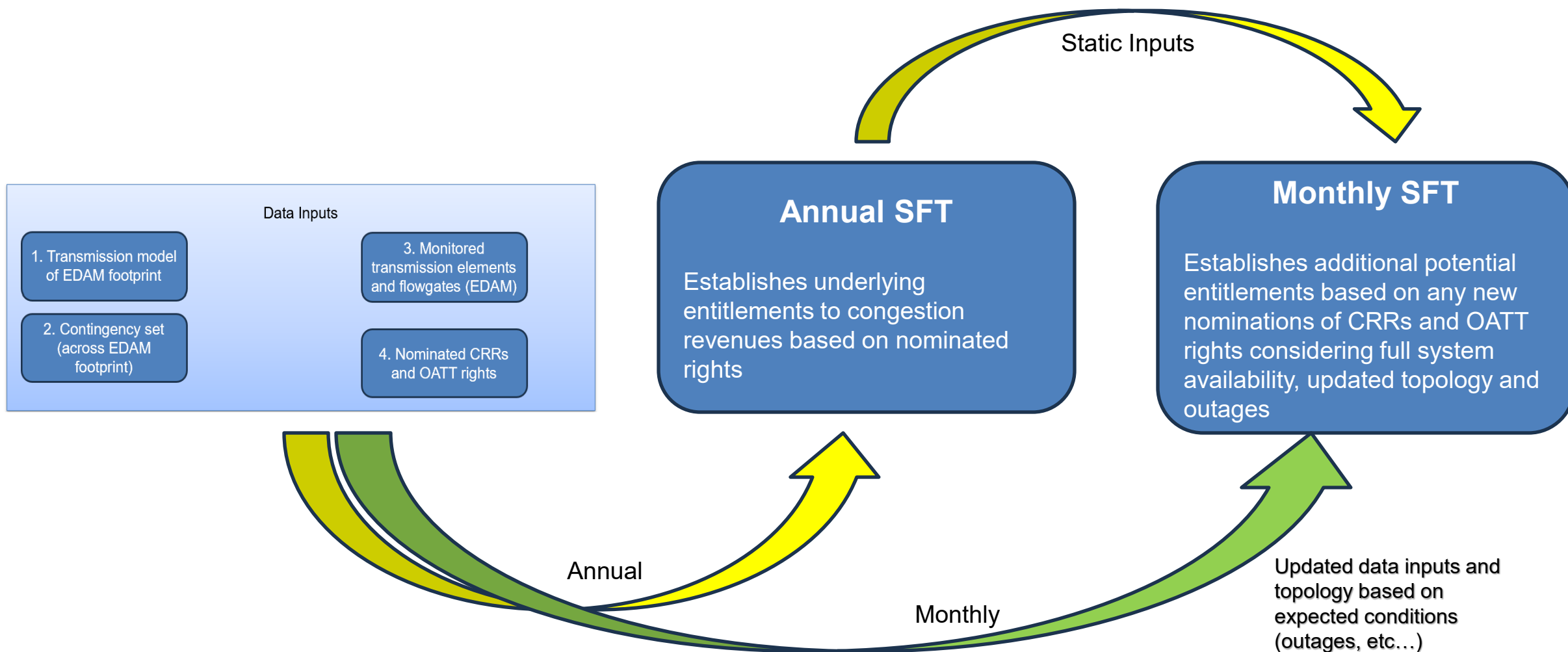
Typical inputs associated with transmission sources/sinks

| Start Date | End Date  | Hedge Type | CRR Type | TOU | Nominated MW | Allocated MW |
|------------|-----------|------------|----------|-----|--------------|--------------|
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 16.947       | 7.206        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 13.052       | 11.106       |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 8.671        | 7.025        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 18.968       | 7.487        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 2.014        | 1.42         |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 14.577       | 6.048        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 16.63        | 5.947        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 19.528       | 4.29         |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 2.752        | 1.382        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 7.109        | 4.233        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 0.097        | 0.023        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 7.415        | 2.866        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 18.867       | 5.9          |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 15.573       | 10.878       |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 16.954       | 16.5         |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 16.655       | 1.457        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 17.157       | 16.263       |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 17.307       | 11.897       |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 5.697        | 1.997        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 13.635       | 12.093       |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 5.961        | 0.016        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 3.654        | 3.073        |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 18.815       | 16.168       |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | OFF | 1.476        | 0.37         |
| 7/1/2026   | 7/31/2026 | OBL        | LSE      | ON  | 6.121        | 1.992        |

Typical outputs identifying effects and potential violations of constraints

| Device Name                           | EMS Device Name          | Type        | Direction | Limit  | Violation | Contingency             |
|---------------------------------------|--------------------------|-------------|-----------|--------|-----------|-------------------------|
| 7820_TL230S_OVERLOAD_NG_3             |                          | Interface   |           | 127.9  | 0         |                         |
| 7820_TL23040_IV_SPS_NG_1              |                          | Interface   |           | 252.5  | 0         |                         |
| 7820_TL23040_IV_SPS_NG_1              |                          | Interface   |           | 253.3  | 0         |                         |
| HUMBOLDT_IMP_NG_1                     |                          | Interface   |           | 60.4   | 0         |                         |
| HUMBOLDT_IMP_NG_1                     |                          | Interface   |           | 57.13  | 0         |                         |
| IPPUTAH_ITC                           |                          | Interface   |           | -126.1 | 0         |                         |
| RDM230_ITC                            |                          | Interface   |           | -317.7 | 0         |                         |
| SILVERPK_ITC                          |                          | Interface   |           | -3.3   | 0         |                         |
| Conductor_1422                        | SANMIG-COLNG1_70_BR_1_1  | Line        | From-To   | 40.8   | 0         | PG1 GATES-TMPLTN 230    |
| Conductor_2343                        | INYOKN-RNDSBG_115_BR_1_1 | Line        | From-To   | 135.1  | 0         | SC1 KRAMER-INYOKN_3 115 |
| Conductor_2681                        | PSWEET-ROBROY_115_BR_1_1 | Line        | To-From   | 131    | 0         | PG1 GRNVLY-CMPEVR 115   |
| Conductor_2681                        | PSWEET-ROBROY_115_BR_1_1 | Line        | To-From   | 131.5  | 0         | PG1 GRNVLY-CMPEVR 115   |
| Conductor_593                         | TRCYPP-TESLA_230_BR_2_1  | Line        | To-From   | 464.4  | 0         | PG1 TESLA-TRACY 230 1   |
| Conductor_593                         | TRCYPP-TESLA_230_BR_2_1  | Line        | To-From   | 469.3  | 0         | PG1 TESLA-TRACY 230 1   |
| Conductor_964                         | INYO-INYO24_230_BR_1_1   | Line        | From-To   | 65.5   | 0         | SC1 CONTRL-INYOKN_2 115 |
| Conductor_964                         | INYO-INYO24_230_BR_1_1   | Line        | From-To   | 56.41  | 0         | SC1 CONTRL-INYOKN_2 115 |
| _ae6c45ec-f3fe-4202-a86a-111568e17f71 | LGRAND-ADERA_115_BR_1_1  | Line        | From-To   | 128.7  | 0         | PG1 MNDOTA-PNOCHE 115   |
| _ae6c45ec-f3fe-4202-a86a-111568e17f71 | LGRAND-ADERA_115_BR_1_1  | Line        | From-To   | 130.3  | 0         | PG1 MNDOTA-PNOCHE 115   |
| Transformer_16657                     | BNK-1                    | Transformer | From-To   | 40.62  | 0         | PG1 CARBOU-TBLMTN 230   |
| Transformer_16657                     | BNK-1                    | Transformer | From-To   | 30.6   | 0         | PG1 CARBOU-TBLMTN 230   |
| Transformer_628                       | BNK-1T                   | Transformer | To-From   | 70.08  | 0         | PG1 CORTIN 230-115 BK4  |

# Annual and Monthly SFT Processes



## Nomination process of CRRs and eligible firm OATT rights

- The SFT would include CRRs and eligible firm OATT rights that are nominated through the process.
- The CAISO balancing area has an existing process through which CRRs are nominated, particularly during the allocation process, by load serving entities (LSE) within the balancing area.
- EDAM entities – working with their transmission customers and transmission providers within their balancing area – would also nominate eligible firm OATT rights into the SFT.
  - Potential need to establish process and timelines for coordination with transmission customers and transmission providers within the same balancing area

# Modeling of eligible firm OATT rights

- Eligible firm OATT rights: long-term firm PTP and NITS rights
  - These transmission rights are based on existing transmission reservations and pay for transmission service across the host system
- Representation of Point-To-Point (PTP) transmission rights within the SFT:
  - Reserved source (generator or import location) and sink (internal load or export location)
  - Represented at the reserved MW quantity during reservation period
- Representation of Network Integration Transmission Service (NITS) rights within SFT:
  - Reserved source of designated network resource (generator or import location) and sink (designated network load within balancing area) – as nominated by EDAM entity
  - Represented at the MW quantity of designated network resource (reservation)
  - Nomination of designated network resource not to exceed NITS load forecast

## Consideration of CRR rights within a common SFT

- CRRs nominated by LSEs through the allocation process would be considered within the common SFT.
  - Allocated CRRs are most akin to NITS transmission rights held by LSEs
  - Reserved PTP transmission rights have been evaluated for ATC on host system and pay for the transmission on the host system (based on reserved amount whether or not scheduled)
- The CRR nominations are limited to sources and sinks within the CAISO balancing area and intertie scheduling points.
- The nominated source/sink CRRs by CAISO LSEs would be incorporated into the common SFT along with long-term firm PTP and NITS rights nominated by EDAM entities.

**How do we  
consider  
comparability?**

## SFT Annual Process Considerations

- The SFT process would be conducted approximately 4-5 months prior to the start of a next calendar year.
- Annual SFT is performed across four quarters:
  - Season 1 (Q1): January, February, March
  - Season 2 (Q2): April, May, June
  - Season 3 (Q3): July, August, September
  - Season 4 (Q4): October, November, December
- The annual SFT – currently – considers 65% of the transmission system capacity (the rest is represented within the monthly SFT).
  - Recognizing broader EDAM footprint is considered with more transparency of parallel flows, a higher percentage may be warranted.

# SFT Annual Process – Tiered SFT Evaluation

- Generally, the SFT is performed through a tiered process that allows for gradual transmission capacity scaling, in part, to ensure physical capabilities of the grid are respected and not over-allocated.
- Tier 1
  - Up to 50% of nominated eligible firm OATT rights and nominated CRRs for allocation (up to 50% load metric)
  - For CRRs, includes source/sink combinations allocated in prior year CRR allocation (as today)
- Tier 2
  - Up to two thirds nominated eligible firm OATT rights and nominated CRRs for allocation
- Tier 3
  - Up to 100% of nominated eligible firm OATT rights and nominated CRRs for allocation

# SFT Monthly Process – Tiered SFT Evaluation

- Performed 6 weeks prior to the start of each month.
- Monthly SFT represents 100% of the available transmission system capacity across the EDAM footprint, adjusted for planned transmission outages and topology changes.
- Tier 1
  - Nomination of any remaining long-term firm OATT rights that may not have received full feasibility within annual process and any new rights that may have been secured between the annual and the specific monthly process.
  - For CRRs, continue to nominate up to 100% difference between monthly CRR eligible quantity and total CRRs allocated in annual process (today's process).
- Tier 2
  - Nominate remaining long-term firm OATT rights and new rights enabled between annual and monthly process that were not already allocated under Tier 1.
  - For CRRs, nominate up to 100% difference between CRR eligible quantity and CRRs allocated in annual process, minus those allocated in Tier 1 (today' process).

## Important questions to consider for *Concept #3*

- Incentives

- Are there incentives for TSPs to make additional firm transmission capacity available for sale on a long-term basis to be nominated into the SFT? If so, how realistic are these incentives in light of the role and function of the TSP?
- Are there other incentive considerations that should be mitigated or managed through the design of *Concept #3*?

- SFT Processes

- CRRs today have a time of use (TOU) element that is part of the SFT. How should that be considered in the context of a broader common SFT evaluation that considers OATT rights?
  - CRRs are evaluated in TOU context, while OATT rights representation is unchanged
- The annual SFT process today (when conducted in context of evaluating feasibility of source/sink CRRs) considers only 65% of the transmission system capacity. Should that amount be revisited when applied in a common SFT across the EDAM footprint?

# Managing Congestion Underfunding Risk

- Entitlements to congestion revenues may be affected by unplanned constraints/transmission outages that may materialize within the month (outside of what is captured in SFT).
- The market operator may not collect sufficient congestion revenues to fully pay out the entitlements in those circumstances.
- In those cases, the ISO as market operator would allocate only the collected congestion revenues.
- This is consistent with how congestion revenues are allocated within the CAISO balancing area for CRRs – only collected revenues are allocated and an entitlement does not establish a financial right to non-collected congestion revenues.
  - Consistent with the *CRR 1B Initiative* policy

## Next Steps

- Meeting materials are available on the initiative webpage: [California ISO - Extended day-ahead market - congestion revenue allocation](#)
- Comments on today's workshop are requested by August 10, 2026.
  - A comment template will be made available following the meeting
- The next working group meeting topics, to be scheduled in August, will be informed by stakeholder comments and continued design concept evaluation.
- For any additional questions, please email us at [ISOStakeholderAffairs@caiso.com](mailto:ISOStakeholderAffairs@caiso.com)

# This Week at the ISO – 7/27/26

**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](#)*

- Monday, July 27 – [2026 ISO Planning Standards Update](#)
  - 10:00am – 12:00pm PT
- Tuesday, July 28 – [Extended Day-Ahead Market Congestion Revenue Allocation](#)
  - 9:00am – 12:00pm PT ([link](#))
- Tuesday, July 28 – [Technical User Group](#)
  - 10:00am – 11:00am PT (developer account required)
- Tuesday, July 28 – [BPM Change Management Proposed Revision Request Review](#)
  - 11:00am – 12:00pm PT ([register](#))
- Tuesday, July 28 – [Cluster 16 Interconnection Request In-Take Process Training](#)
  - 1:00pm – 2:30pm PT ([link](#))
- Wednesday, July 29 – [Transmission Development Forum](#)
  - 9:00am – 4:00pm PT ([link](#))
- Wednesday, July 29 – [Settlement User Group](#)
  - 10:00am – 11:00am PT ([link](#))
- Thursday, July 30 – [Market Performance and Planning Forum Q3](#)
  - 1:00pm – 4:00pm PT ([link](#))
- Friday, July 31 – [Market Seams Workshop](#)
  - 9:00am – 12:00pm PT ([Register](#) for in-person attendance; [virtual participation link](#))

## **Comment Submission Deadlines**

- Monday, July 27 - [2027 Grid Management Charge Revenue Requirement, Project Budget, and Rates](#)
- Tuesday, July 28 - [Price Formation Enhancements](#)

# 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

## **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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# REGISTRATION IS OPEN

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

**Symposium program - Oct. 6**  
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