

## IPE 5.0 Scoping Document

The California Independent System Operator (ISO) will initiate a new Interconnection Process Enhancement (IPE) stakeholder initiative in August 2025. The ISO will refer to the next IPE initiative as IPE 5.0, as it is the fifth IPE initiative. The ISO's primary objective is to address commitments the ISO made during IPE 2023, where the ISO made foundational changes to its interconnection procedures, which were approved by FERC. Initially, Cluster 15 interconnection requests in 2023 set record volumes, widening the gap between requested capacity and the ISO's ability to provide meaningful study results and safely interconnect new resources. Track 2 Interconnection Process Enhancements, implemented in 2024 and 2025, have significantly reduced the Cluster 15 to a more manageable volume that is scaled to the amount of resources needed over the next 15 years. Nevertheless, the ISO has committed to monitoring key elements of the reformed interconnection process and considering modifications to the process in light of any lessons learned.

During the IPE 2023 initiative, in both track 2 and track 3, the ISO committed to monitoring and potentially revisiting certain policy items based on cluster 15 implementation. Below, the ISO provides a catalog of policy items for consideration in IPE 5.0. This catalog includes:

- IPE 2023 track 2 commitments to monitor and revisit certain elements of the interconnection request intake process;
- IPE 2023 track 3 commitments to continue to explore certain concepts;
- Additional ideas recommended by stakeholders for consideration in IPE 5.0; and
- ISO-proposed modifications to the interconnection process, based on implementation experience.

This document merely catalogues the suite of issues for monitoring and reconsideration to ensure full documentation and consideration of the issues. When the ISO issues a straw proposal for IPE 5.0 in early August, the ISO will respond to each of these items individually, and will provide a rationale for whether or not we propose modifications to these topics based on experience in Cluster 15.

### **IPE 2023 track 2: commitments to monitor and revisit elements of interconnection request intake**

In the Final Addendum to the Final Proposal, the ISO committed to monitoring the results of various components of the interconnection request intake process and coordinating with the California Public Utilities Commission (CPUC), local regulatory authorities, and stakeholders to adjust any necessary components for Cluster 16 and future clusters. These elements are listed below.

- Transparency, rigor, and integrity of the LSE allocation process: The ISO committed to working with state and local regulatory authorities to ensure that

LSEs will make thoughtful and transparent decisions that best align with their individual procurement needs.

- The ISO commits to monitoring expressions of non-LSE interest in Cluster 15 and exploring opportunities for increased participation of non-LSEs in Cluster 16 and future interconnection cycles, including:
  - Continued alignment of non-LSE procurement needs and load growth with state and local resource planning.
  - Understanding the extent to which non-LSEs currently coordinate with LSEs (e.g. energy service providers) on procurement.
  - Considering modifications to the one-project per non-LSE limit and the maximum point values for non-LSE projects.
- Trends in energy only interconnection requests for alignment with resource portfolios.
- Revisit the cap on full allocation election to small LSEs and revise as appropriate.
- Revisit the methodology for mixed-fuel resources to receive 100 sub-points in the LSE/non-LSE award of commercial interest points.
- Enhance the definition of long lead-time resources and provide greater clarity for system need points.
- Incorporation of WDAT projects into the intake scoring process and the 150% study limit accounting.

The ISO released a Summary of Cluster 15 Intake Scoring Results on June 12, 2025. The data aggregated and summarized in this report will inform the ISO's approach to a number of the items listed above.<sup>1</sup>

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<sup>1</sup> <https://www.caiso.com/documents/summary-of-cluster-15-intake-scoring-results.pdf>

## **IPE 2023 track 3: commitments to revisit policy ideas**

The ISO committed to revisiting the following policy items during track 3 of the 2023 IPE initiative.

- Allowing operational Energy Only projects to re-enter the interconnection process to be studied for and seek deliverability.
- Consideration of allowing long lead-time resources to defer their first attempt to seek deliverability.

## **Additional stakeholder suggestions for IPE 5.0**

In addition to the items listed above, stakeholders have suggested consideration of the following changes in IPE 5.0 in recent stakeholder comments:

- Reserve TPD for long lead-time resources to ensure transmission availability and transparency.
- Coordinate with CPUC to ensure deposits are fair, refundable, and tied to project progress to address the lack of regulatory oversight on commercial interests.
- Adjust the large generator interconnection agreement (LGIA) process to the execution is not required before TPD allocation since this will place undue financial risk on developers.
- Implementation of a reservation system for TPD availability due to prior clusters.
- More transparent data via a consolidated searchable form containing information on associated reliability network upgrades (RNUs) and deliverability network upgrades (DNUs), or at a minimum, queue positions.

## **Additional ISO-proposed issues for IPE 5.0**

The ISO identified the following additional issues to explore in IPE 5.0 during implementation of the 2023 IPE reforms:

- Managing the impact of the accumulation of stagnant projects in the queue, including pre-cluster 15 projects and any future accumulation of projects from cluster 15 and later.
- Modifications to the tariff to revise certain administrative tasks, timelines, and procedural steps to optimize efficiency for the ISO and stakeholders. These will be described in detail in the straw proposal.

## **IPE 5.0 Schedule**

<b>Current Schedule</b>	<b>Interconnection Process Enhancements 2025 Schedule</b>
<b>07/09/2025</b>	Scoping Document Posting
<b>07/16/2025</b>	Deadline for Stakeholder Comments on Scoping Document
<b>08/01/2025</b>	Straw Proposal Posting
<b>08/11/2025</b>	Straw Proposal Workshop
<b>08/25/2025</b>	Deadline for Stakeholder Comments on Revised Straw Proposal

<b>10/13/2025</b>	Draft Final Proposal Posting
<b>10/20/2025</b>	Draft Final Proposal Workshop
<b>11/03/2025</b>	Deadline for Stakeholder Comments on Draft of Final Proposal
<b>12/22/2025</b>	Final Proposal Posting
<b>01/05/2026</b>	Stakeholder Call on Final Proposal
<b>01/19/2026</b>	Deadline for Stakeholder Comment on Final Proposal and Tariff Language
<b>03/05/2026</b>	Board of Governors Meeting
<b>08/02/2026</b>	Cluster 16 Resource Interconnection Standards Fair (Tentative)
<b>10/01/2026</b>	Cluster 16 Window