California ISO

Policy Initiatives Catalog and Roadmap Process

Market and Infrastructure Policy

September 1, 2022

The Catalog Process

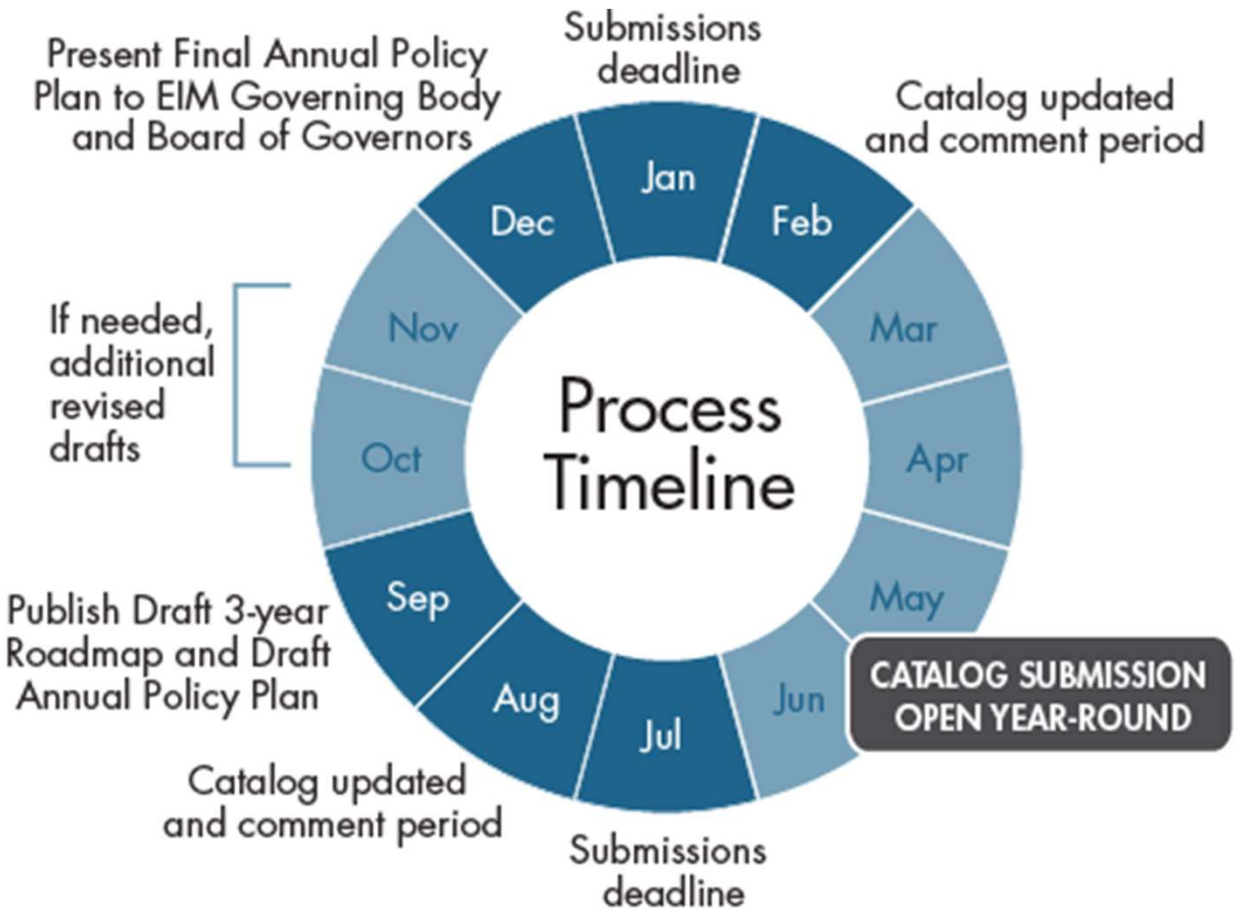
- The Stakeholder Initiatives Catalog captures
  - Initiatives submitted by Stakeholders or added by ISO and included in the Catalog
  - Initiatives excluded from the Catalog
  - Discretionary items identified by Stakeholders and ISO staff
  - Non-discretionary initiatives

- Non-discretionary items include
  - System reliability
  - Efficient and reliable market function
  - Regulatory requirement

The Catalog Process, continued

- Initiatives include policy issues that typically entail Tariff changes – not simply administrative or software changes
- Stakeholder submissions to the Catalog are welcome year-around
- The Catalog is generally updated twice each year, so there are cutoffs in January and July for submissions to be included in the next update
- The Catalog informs the Roadmap process…

Catalog Update and Roadmap Development Process



The Roadmap Process

- On an annual basis, following the fall update to the Catalog, the ISO develops a Roadmap for the upcoming three years, and a detailed plan for the upcoming year

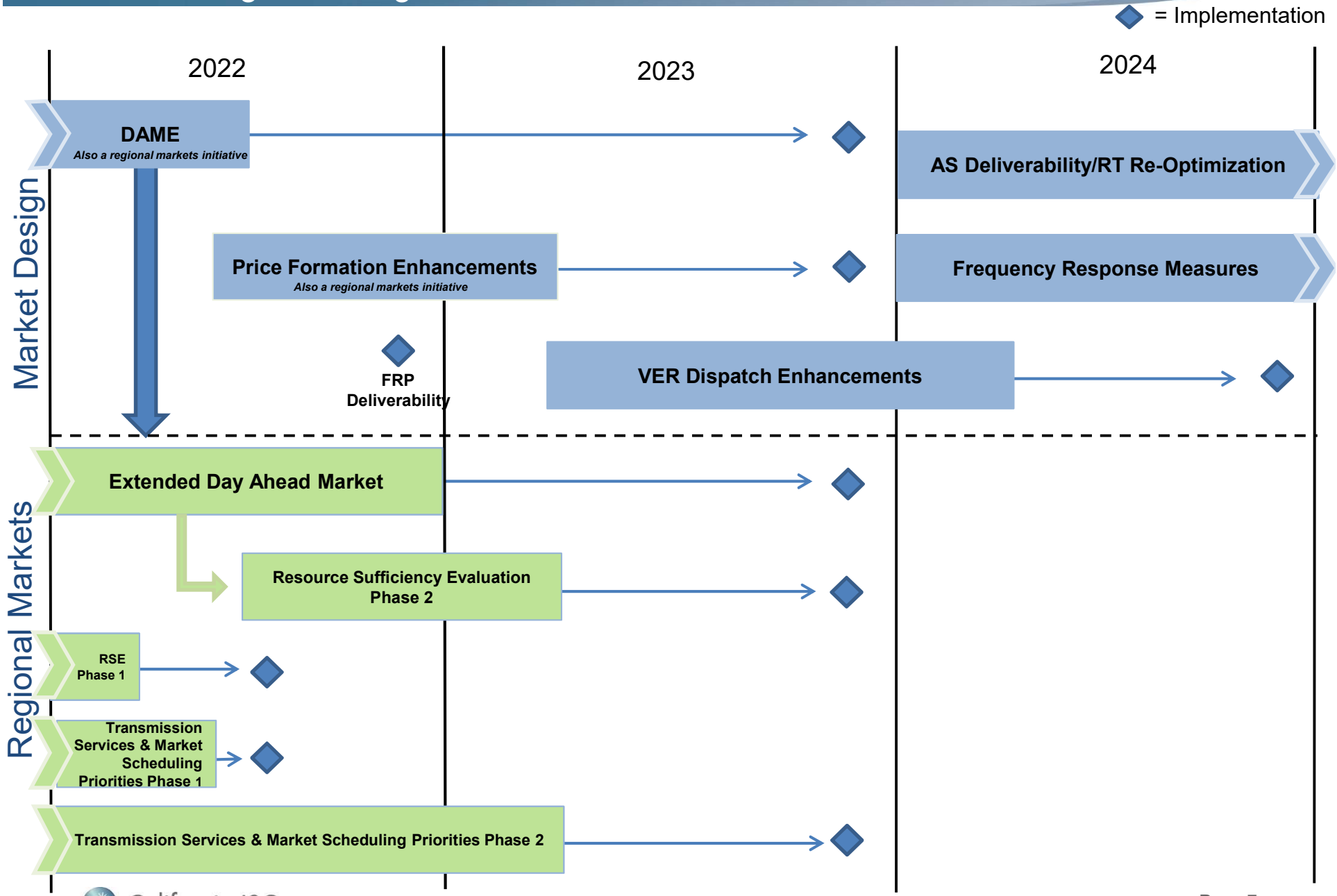
- The Roadmap captures the policy, Tariff, and implementation timelines for the initiatives the ISO is undertaking and plans to undertake over the next three years

- A detailed plan for the upcoming year is also developed

The Roadmap Process

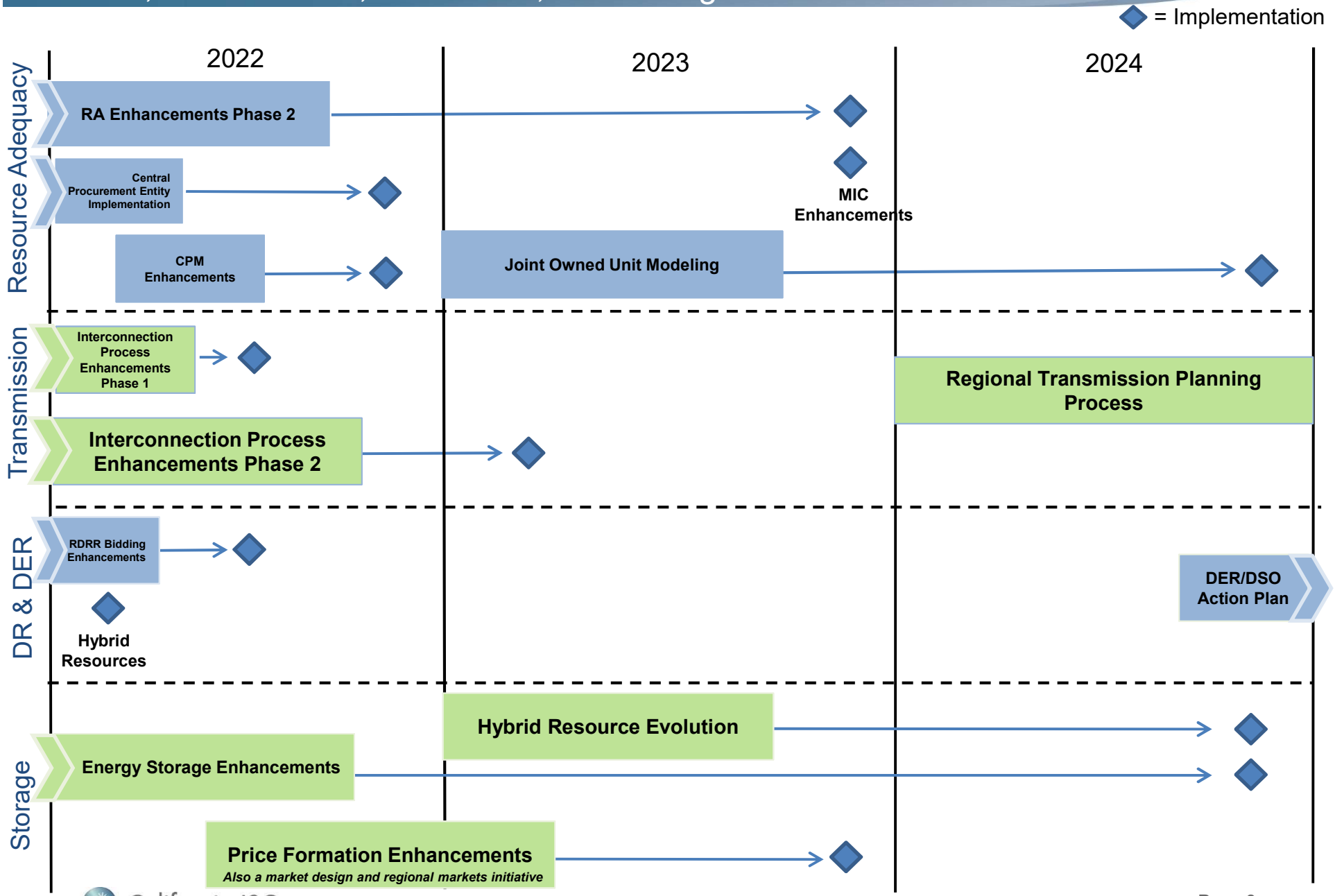
- The Roadmap process balances many competing constraints
  - Policy development
  - Legal input, Tariff changes
  - Development of detailed business requirements
  - Business Process Manual changes
  - Implementation considerations, including ISO staff as well as ISO vendors
  - FERC timelines
  - Stakeholder input on implementation hurdles

Market Design and Regional Markets



*Timeframes are approximate and subject to change

RA, Transmission, DR & DER, and Storage



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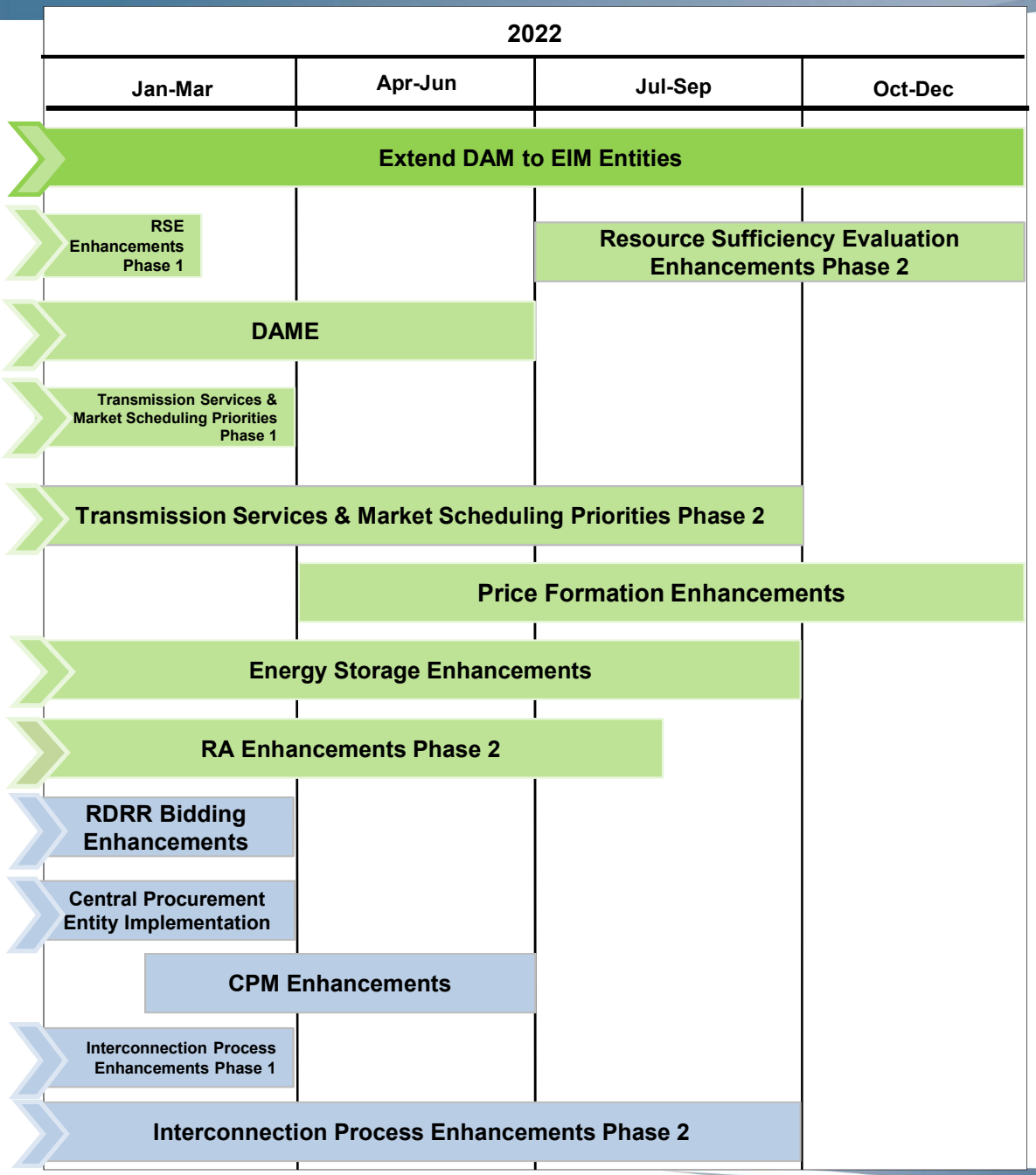
2022 Draft Annual Plan



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Opportunities for Input

- Twice annually, generally January and July, there is a call for Stakeholders to submit items to the Policy Initiatives Catalog
  - However – we accept submissions all year around
- The ISO published an updated Catalog and solicits Stakeholder comments
  - Comments due on the current iteration 9/23
- The final Catalog is published, Roadmap is developed, and posted for comment at the end of the calendar year

Questions, Thoughts, & Suggestions