



Southwest Power Pool
TRANSMISSION WORKING GROUP MEETING

May 4, 2010
Teleconference

• M I N U T E S •

Agenda Item 1 – Administrative Items

TWG Chair Noman Williams called the meeting to order at 9:01 a.m. The following people were in attendance: (Att 1 – Proxies)

TWG Members

Noman Williams, Sunflower Electric Power Corp
Jason Atwood, Dogwood Energy
John Chamberlin, City Utilities of Springfield
Jason Fortik, Lincoln Electric System
Ronnie Frizzell, Arkansas Electric Cooperative Co
John Fulton, Southwestern Public Service
Travis Hyde, Oklahoma Gas and Electric
Dan Lenihan, Omaha Public Power District
Randy Lindstrom, Nebraska Public Power District
Sam McGarrah, Empire District Electric
Matt McGee, American Electric Power
Nathan McNeil, Midwest Energy
Jason Shook, GDS Associates for ETEC
Don Taylor, Westar Energy
Mitch Williams, Western Farmers Electric Cooperative
Brian Wilson for Harold Wyble, Kansas City Power & Light

Other Stakeholders and Staff

Tony Gott, Associated Electric Cooperative
Rachel Hulett, SPP Staff
John Mills, SPP Staff
Nate Morris, Empire District Electric
Katy Onnen, SPP Staff
Paul Simoneaux, Entergy

Agenda Item 2 – Attachment O Review

Since MOPC is holding a meeting on Thursday to approve the Attachment O ITP revisions, this is the last time for TWG to review and provide comments on the Tariff language. Katy Onnen, SPP Staff, explained what changes the RTWG had made since TWG's approval of Attachment O revisions (Att 2 – Attachment O Revisions).

The group discussed the changes and decided that several concerns needed to be brought to RTWG and MOPC, including the following concerns:

- 1) Lack of tariff language relating to upgrades resulting from the NERC Compliance Assessments.



- 2) FERC does not approve TO's local planning processes. The TO files them in a 715 filing, but FERC does not approve them. TWG would like "FERC approved" removed when discussing TO's local planning processes.
- 3) In Section III.8.a, TWG believes the last sentence that was added by the RTWG ("The analysis shall also consider the value brought to the SPP Region by incremental changes to the proposed solutions.") is unclear and could possibly allow SPP to circumvent the stakeholder process. TWG would like this entire sentence deleted.
- 4) TWG also believes the intention of the language added in Section VI.4 is unclear. TWG would prefer just to state that an NTC will be issued with four years of financial commitment. The language in the first paragraph of Section I and the first paragraph of Section V should be more similar.
- 5) Spell out "Transmission Provider" in the second box of Sponsored Upgrades in Figure 1.
- 6) Make order of Policy, Reliability, and Economic Inputs consistent in the title of the section and the box in Figure 1.

Noman Williams also encouraged the members to talk to their MOPC representatives about these issues and voice them during the MOPC meeting. Since neither Noman nor Travis can be present at the MOPC meeting, staff will voice these concerns to the MOPC.

Agenda Item 3 – Adjournment

With no further business, Noman Williams adjourned the meeting at 10:30 a.m.

Respectfully Submitted,

Rachel Hulett
TWG Secretary

Brian Wilson for Harold Wyble, KCPL

From: Wyble, Harold

Sent: Monday, May 03, 2010 9:19 AM

To: Rachel Hulett; 'Williams, Noman'

Cc: Wilson, Brian

Subject: FW: TWG 5/4/10 Registration and Background posted

Brian Wilson will have my proxy vote for this teleconference.

ATTACHMENT O

TRANSMISSION PLANNING PROCESS

I. Overview of Planning Process

The Transmission Provider's transmission planning process is an open process. New and proposed transmission facilities or increases in physical transmission ratings can come from *six* several different areas of the Tariff. These areas are: 1) transmission service requests; 2) Generation Interconnection Service requests; 3) upgrades needed to satisfy reliability criteria (reliability upgrades); 4) upgrades that provide economic benefits as part of the integrated transmission planning process (ITP Upgrades); 4) the Balanced Portfolio process; 5) *upgrades that are identified through the high priority study process (high priority upgrades) that are not included in a Balanced Portfolio*; and 6) upgrades that do not fit these other categories (Sponsored Upgrades) requests for Sponsored Upgrades. Figure 1 illustrates the planning processes within SPP and how these result in a comprehensive regional plan called the SPP Transmission Expansion Plan (STEP).

Each of these sources of potential upgrades has its own evaluation and approval process. Transmission service requests are evaluated in accordance with Attachment Z1. Generator interconnection requests are assessed under the provisions of Attachment V. In addition, the process for adding new delivery points is described in Attachment AQ. The integrated transmission planning process and other study processes for Sponsored Upgrades, Balanced Portfolios and high priority upgrades are described in this Attachment O.

The results from all these sources are collected and reported in the annual SPP Transmission Expansion Plan which gives a ten (10)twenty year projection of transmission changes in the SPP Region. The SPP Transmission Expansion Plan, as endorsed by the Markets and Operations Policy Committee, is presented to the SPP Board of Directors once a year for their review and approval, as required in accordance with Section VII of this Attachment O. The SPP Board of Directors may modify upgrades that are part of approved Balanced Portfolios in accordance with Section IV of Attachment J, reliability upgradesITP Upgrades, upgrades that are part of approved Balanced Portfolios, *or high priority upgrades* in the SPP Transmission Expansion Plan throughout the year in accordance with Section VII of this Attachment O. Projects associated with transmission service requests and Generation Interconnection Service requests and Sponsored Upgrades are may also be added throughout the year as Service Agreements and interconnection agreements are executed.

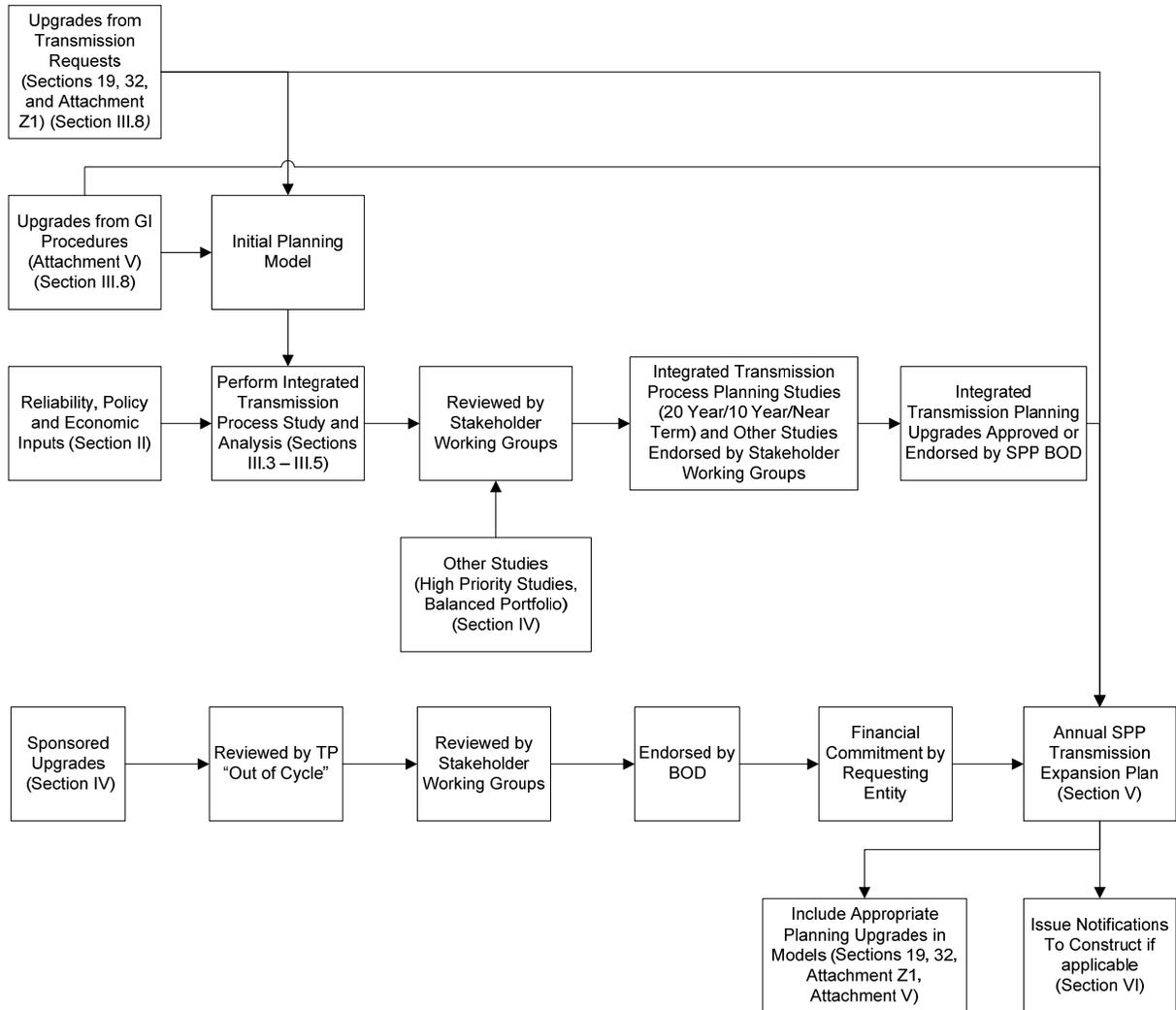
SPP's long range transmission planning is conducted over a three year planning cycle as shown in Figure 2. A 20 Year Assessment is conducted during the first half of this three year cycle. A 10 Year Assessment is conducted in the second half of the three year cycle. The Near Term Assessment is conducted each year and generally looks over the next five to seven years. Each of these assessments and the approval process is set forth in this Attachment O.

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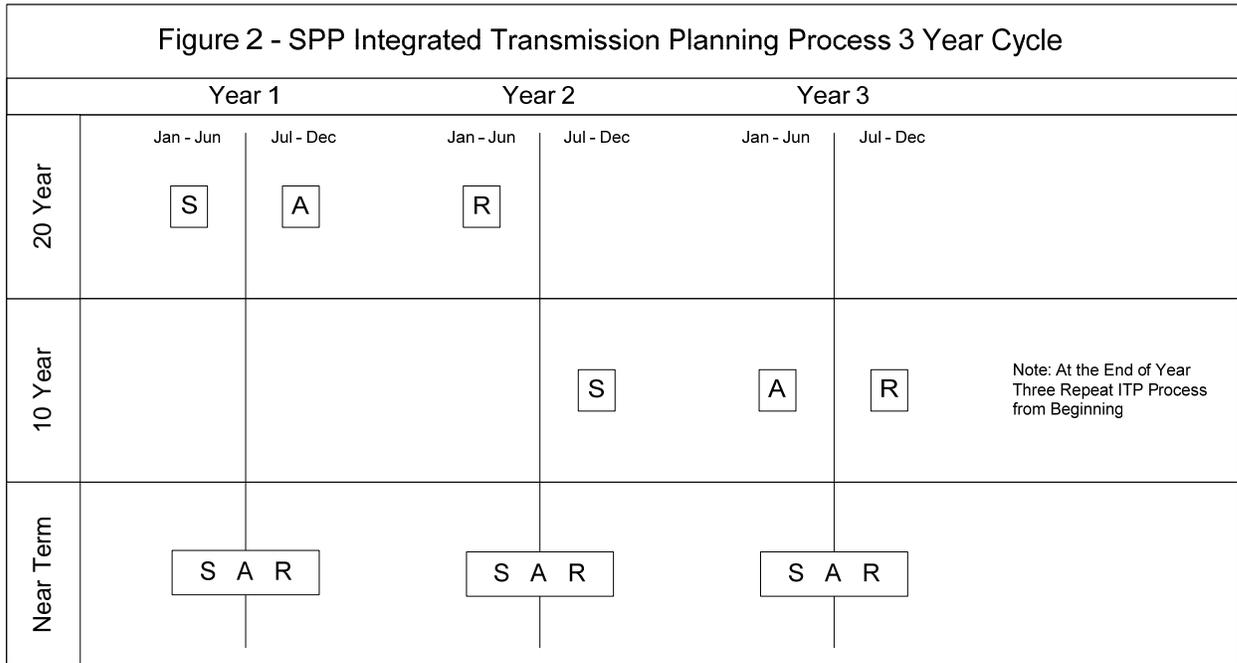
Figure 1 - SPP Transmission Planning



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S = Scenarios
 A = Analysis
 R = Results

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II. Roles and Responsibilities

References to the “stakeholder working group” is a generic term that references those working group(s) as defined in the SPP Bylaws, Sections 3 through 6 that are charged with the transmission planning process. The current names of all the working groups shall be posted on the SPP website.

I. Transmission Upgrades Related to Transmission Service Requests

Transmission upgrades related to requests for transmission service are described in Sections 19 and 32 of the Tariff and Attachment Z1 to the Tariff. These upgrades are included as part of the future expansion of the transmission system, upon the execution of the various Service Agreements with the Transmission Customers. Transmission upgrades related to an approved request for transmission service may be deferred or supplemented by other upgrades based upon the results of subsequent studies. Changes in planned upgrades do not remove the obligation of the Transmission Provider to have adequate transmission facilities available to start or continue the approved transmission service.

II. Transmission Upgrades Related to Generation Interconnection Service Requests

Interconnection facilities and other transmission upgrades related to requests for generation interconnection service are described in Attachment V. These upgrades are included as part of the future expansion of the transmission system upon the execution of the various interconnection agreements with the Generation Interconnection Customers. Transmission upgrades related to an approved interconnection agreement may be deferred or supplemented by other upgrades based upon the results of subsequent studies. Changes in planned upgrades do not remove the obligation of the Transmission Provider to have adequate transmission facilities available to start or continue the approved interconnection service.

III. Transmission Upgrades Needed to Satisfy Reliability Criteria

Reliability upgrades are those transmission upgrades and additions that are required to meet NERC, SPP and the Transmission Owner’s local area reliability criteria. Section III describes the process of determining these requirements, how the requirements are approved, and ultimately how the final set of reliability projects is selected. In this area of transmission planning the future grid requirements for maintaining service to firm transmission service sold in the past is evaluated and approved.

1) Roles and Responsibilities

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7 of 51

1. Division of Responsibilities

- a) The rights, powers and obligations for planning are set forth in the SPP Membership Agreement in (i) Articles 2.1.1(j), 2.1.5 and 2.2(a) for the Transmission Provider and (ii) Articles 3.5 and 3.9 for the Members. The division of responsibility between the Transmission Provider and the Members is set forth in Section 3.0 of the SPP Criteria and in this Attachment O. The SPP Membership Agreement, the SPP Criteria and the Tariff shall be posted on the SPP website.
- b) The Transmission Provider shall be responsible for developing the list of reliability projects in accordance with the stakeholder process set forth in Sections III.2, III.3 and VII of this Attachment O, and including inter-regional coordination set forth in Section X VIII of this Attachment O.
- c) To develop the list of reliability projects, the TheTransmission Provider shall perform transmission planning studies to assess the reliability and economic operation of the Transmission System in accordance with Section III of this Attachment O.
- d) In concert withAs inputs to the planning process to develop the reliability projects, the Transmission Provider shall include and maintain requirements to serve existing commitments for long-term transmission service and interconnection service in accordance with Sections I and IIII.7 of this Attachment O and any applicable roll-over rights as set out in Section 2.2 of the Tariff. It shall also take into account all previously approved projects.
- e) The Transmission Provider shall review, and include as appropriate, all local area upgrades to meet local area reliability criteria as proposed by the Transmission Owners including those plans developed by Transmission Owners that have their own FERC approved local planning process to meet local area reliability criteria to ensure coordination of the projects set forth in such plans with the potential solutions developed in the regional planning process.
- f) *The Transmission Provider shall review and include, as appropriate, all reasonably expected demand resource, transmission, or generation options identified by stakeholders.*
- g) The Transmission Provider shall describe the details regarding expansion planning methodology, criteria, assumptions and data in the SPP Transmission Expansion Planning Manual which shall be posted on the SPP website.

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- h) In accordance with its NERC reporting requirements, the Transmission Provider shall publish an annual reliability report that shall include a list of the following:
 - i) Regional upgrades required to maintain reliability in accordance with the NERC Reliability Standards and SPP Criteria;
 - ii) Zonal upgrades required to maintain reliability in accordance with more stringent individual Transmission Owner planning criteria; and
 - iii) Inter-regional upgrades developed with neighboring Transmission Providers to meet inter-regional needs, including results from the coordinated system plans.

2) Stakeholder Working Groups

- a) The purpose of the stakeholder working groups is to provide technical advice, assistance and oversight to the Transmission Provider in all aspects of the regional, sub-regional and local planning process, including but not limited to:
 - i) Review and development of coordinated planning among the Transmission Provider and the Transmission Owners including accepted Network Upgrades developed by those Transmission Owners that have their own FERC approved local planning process to meet local area reliability criteria;
 - ii) Review and development of regional planning criteria;
 - iii) Review and development of Available Transfer Capability related calculation criteria as specified in Attachment C to the Tariff;
 - iv) Review and development of transmission rating criteria; and
 - v) Compliance with NERC Reliability Standards concerning transmission assessment, transfer capability and ratings of transmission facilities.
- b) All the stakeholder working group representation shall be appointed and chaired in accordance with Article 3.0 of the SPP Bylaws. All meetings of the stakeholder working groups are open to all entities.
- c) Voting in the various stakeholder working groups shall conform to Article 3.9 of the SPP Bylaws.

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- d) The data, information, and technical support necessary for the Transmission Provider to perform studies as required by the planning process and to develop the regional reliability projects are provided by the Transmission Owners, Transmission Customers and Generation Interconnection Customers and other entities within the area for which SPP is the regional entity. This process is described in Section IX VII of this Attachment O.
 - e) Stakeholder working groups that work with the Transmission Provider on transmission planning shall meet at least quarterly and additional meetings, web conferences and teleconferences shall be scheduled as needed. Teleconference capability will be made available for stakeholder working group meetings. Notice of meetings of the stakeholder working groups shall be posted on the SPP website and distributed via email distribution lists. Meeting agendas and minutes shall be posted on the SPP website.
- 3) Participation by State Regulators
- In accordance with the SPP Bylaws, any regulatory agency having utility rates or services jurisdiction over a Member may participate fully in all SPP planning activities.
- 4) Adherence to Regional Planning Criteria
- i) The regional planning criteria are comprised of the NERC Reliability Standards and SPP Criteria.
 - ii) The regional planning criteria may change from time to time based upon the then current process for changing reliability criteria.
 - iii) The individual transmission owners shall be obligated under the NERC Reliability Standards and SPP Criteria to resolve reliability violations and compliance needs identified by the Transmission Provider or by the individual transmission owners themselves in accordance with these standards and criteria. The SPP Criteria shall be posted on the SPP website.
- 5) Use of Local Planning Criteria
- i) Individual Transmission Owners within the SPP Region may develop company-specific planning criteria that, at a minimum, conform to the NERC Reliability Standards and SPP Criteria.
 - ii) For each annual planning cycle, Transmission Owners, including those Transmission Owners that have their own FERC approved local planning process, must provide to the Transmission Provider at least once a year, by April 1st their company-specific planning criteria in order for the need for Zonal Reliability Upgrades to be assessed and included in the SPP Transmission Expansion Plan.
 - iii) Transmission Owner planning criteria and assumptions may be modified at any time provided that, if the planning criteria are made more stringent, the increased requirements will not apply retroactively to studies previously completed or studies already underway by the Transmission Provider. Access to the individual Transmission Owner's planning criteria shall be made available via an electronic link on the SPP website.

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- iv) The individual planning criteria of each Transmission Owner, including those Transmission Owners that have their own FERC approved local planning process, shall be the basis for determining whether a reliability violation exists for which a need for a new Zonal Reliability Upgrade should be considered.
- v) The Transmission Owner shall apply its local planning criteria comparably to all load in its service territory.

III. The Integrated Transmission Planning Process

The ITP process is an iterative three-year process that includes 20-Year, 10-Year and Near Term Assessments. The 20-Year Assessment identifies the transmission projects, generally above 300kV, and provides a grid flexible enough to provide benefits to the region across multiple scenarios. The 10-Year Assessment focuses on facilities 100 kV and above to meet the system needs over a ten year horizon. The Near-Term Assessment is performed annually and assesses the system upgrades, at all applicable voltage levels, required in the near term planning horizon.

1) Commencement of the Process

At the beginning of each calendar year the Transmission Provider shall notify stakeholders as to which part(s) of the integrated transmission planning cycle will take place during that year and the approximate timing of activities required to develop the SPP Transmission Expansion Plan. Notice of commencement of the process shall be posted on the SPP website and distributed via email distribution lists.

32) Transmission Planning Forums

The transmission planning forums include planning summits and sub-regional planning meetings and these are conducted as follows:

a) Planning Summits

- i) The purpose of the planning summits is for the Transmission Provider and the stakeholders to share current SPP transmission network issues, develop the study scopes, provide solution alternatives and review study findings. These summits also provide an open forum where all stakeholders have an opportunity to provide advice and recommendations to the Transmission Provider to aid in the development of the SPP Transmission Expansion Plan.
- ii) The planning summits shall be open to all entities.
- iii) The Transmission Provider shall chair and facilitate the planning summits.
- iv) Planning summits shall be held at least semi-annually, including sub-regional breakout sessions of the SPP Region. Teleconference capability will be made available for planning summits. Planning summit web conferences shall be held as needed.
- v) Notice of the planning summits and web conferences shall be posted on the SPP website and distributed via email distribution lists.

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Issued on:

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- b) Sub-regional Planning Meetings
 - i) The Transmission Provider shall define sub-regions from time to time to address local area planning issues.
 - ii) The purpose of the sub-regional planning meetings is to identify unresolved local stakeholder issues and transmission solutions at a more granular level than can be accomplished at general regional planning meetings. The sub-regional planning meetings shall provide stakeholders with local needs the opportunity to provide advice and recommendations to the Transmission Provider and to the Transmission Owners. The sub-regional planning meetings shall provide a forum to review local planning criteria as specified in Section III.5.b of this Attachment O.

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- iii) The sub-regional planning meetings shall be open to all entities.
 - iv) The Transmission Provider shall facilitate the sub-regional planning meetings.
 - v) A planning meeting shall be held at least annually for each individual sub-region.
 - vi) The sub-regional planning meetings shall be held in conjunction with the stakeholder working group meetings. Teleconference capability will be made available for sub-regional planning meetings. Sub-regional planning web conferences shall be held as needed.
 - vii) Notice of the sub-regional planning meetings, teleconferences and web conferences shall be posted on the SPP website and distributed via email distribution lists.
- c) Participation by State Regulators
In accordance with Article 7.0 of the SPP Bylaws, any regulatory agency having utility rates or services jurisdiction over a Member may participate fully in all SPP planning activities.
- 4) Reliability Studies
- a) The Transmission Provider shall summarize the regional, sub-regional and local transmission needs, including accepted Network Upgrades developed by those Transmission Owners that have their own FERC approved local planning process to meet local area reliability criteria, of the SPP Region into a single plan which is assessed on the basis of maintaining the reliability of the SPP Region and economic transmission improvement opportunities.
 - b) The reliability studies shall conform to the NERC Reliability Standards, the SPP Criteria, and to company-specific planning criteria.
 - c) The reliability studies shall cover, at a minimum, the subsequent ten year planning horizon. Information included as part of the analysis is:
 - i) Previously identified and approved transmission projects;
 - ii) Zonal Reliability Upgrades developed by those Transmission Owners that have their own FERC approved local planning process to meet local area reliability criteria;
 - iii) Load and capacity forecasts, including the impact on load of existing and planned demand response resources;
 - iv) Long-term firm transmission service;
 - v) Capacity forecasts, including generation additions and retirements; and
 - vi) Existing and planned demand response resources.
 - d) The details regarding expansion planning methodology, criteria, assumptions and data are included in the SPP Transmission Expansion Planning Manual which shall be posted on the SPP website.
- 3) Preparation of the 20 Year Assessment
- a) The Transmission Provider shall perform a 20 Year Assessment once every three years. The timing of this assessment shall generally be in the first half of each three year cycle.

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Issued on:

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- b) The 20 Year Assessment shall review the system for a twenty year planning horizon and address, at a minimum, facilities 300 kV and above needed in year 20. This assessment is not intended to review each consecutive year in the planning horizon. The Transmission Provider shall work with stakeholders to identify the appropriate year(s) to study in developing the assessment study scope.
- c) The 20 Year Assessment shall assess the cost effectiveness of proposed solutions over a forty year time horizon.
- d) The Transmission Provider shall develop the assessment study scope with input from the stakeholders. The study scope shall take into consideration the input requirements described in this Section III.6, including reliability criteria, economic factors, transmission service agreements, generation interconnection agreements, and previously approved upgrades.
- e) The assessment study scope shall specify the methodology, criteria, assumptions, and data to be used.
- f) The Transmission Provider, in consultation with the stakeholder working groups, shall finalize the assessment study scope.
- g) The assessment study scope shall be posted on the SPP website and will be included in the published annual SPP Transmission Expansion Plan report.
- h) In accordance with the assessment study scope, the Transmission Provider shall analyze potential solutions following the process set forth in Section III.8.

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Issued on:

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- e) The reliability studies shall accommodate and model the specific long-term firm transmission service of the Transmission Customers with Service Agreements under the Tariff and specific interconnections of Generation Interconnection Customers with interconnection agreements under the Tariff, where such Service Agreements and interconnection agreements are either executed or filed unexecuted with the Commission. The reliability studies shall also accommodate and model *all* upgrades that have been approved for construction in accordance with Section VIII of this Attachment O.
- 4) Preparation of the 10 Year Assessment
- a) The Transmission Provider shall perform a 10 Year Assessment once every three years as part of the three year planning cycle. The timing of this assessment shall generally be in the second half of the three year planning cycle.
 - b) The 10 Year Assessment shall review the system for a ten year planning horizon and address, at a minimum, facilities 100 kV and above needed in year 10. This assessment is not intended to review each consecutive year in the planning horizon. The Transmission Provider shall work with stakeholders to identify the appropriate year(s) to study in developing the assessment study scope.
 - c) The 10 Year Assessment shall assess the cost effectiveness of proposed solutions over a forty year time horizon.
 - d) The Transmission Provider shall develop the assessment study scope with input from the stakeholders. The study scope shall take into consideration the input requirements described in this Section III.6, including reliability criteria, economic factors, transmission service and interconnection commitments, and previously approved upgrades.
 - e) The assessment study scope shall specify the methodology, criteria, assumptions, and data to be used.
 - f) The Transmission Provider, in consultation with the stakeholder working groups, shall finalize the assessment study scope.
 - g) The assessment study scope shall be posted on the SPP website and will be included in the published annual SPP Transmission Expansion Plan report.
 - h) In accordance with the assessment study scope, the Transmission Provider shall analyze potential solutions, including those upgrades approved by the SPP Board of Directors from the most recent 20 Year Assessment, following the process set forth in Section III.8.
- 5) Preparation of the Near Term Assessment
- a) The Transmission Provider shall perform the Near Term Assessment on an annual basis.
 - b) The Near Term Assessment will be performed on a shorter planning horizon than the 10 Year Assessment and shall focus primarily on identifying solutions required to meet the reliability criteria defined in Section III.6.
 - c) The assessment study scope shall specify the methodology, criteria, assumptions, and data to be used to develop the list of proposed near term upgrades.
 - d) The Transmission Provider, in consultation with the stakeholder working groups, shall finalize the assessment study scope. The study scope shall take into

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Issued on:

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consideration the input requirements described in this Section III.6, including reliability criteria, economic factors, transmission service and interconnection commitments, and previously approved upgrades.

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- e) The assessment study scope shall be posted on the SPP website and will be included in the published annual SPP Transmission Expansion Plan report.
- f) In accordance with the assessment study scope, the Transmission Provider shall analyze potential solutions, including those upgrades approved by the SPP Board of Directors from the most recent 20 Year Assessment and 10 Year Assessment, following the process set forth in Section III.8.

6) Policy, Reliability and Economic Input Requirements to Planning Studies

The Transmission Provider shall incorporate, as appropriate for the assessment being performed, the following into its planning studies:

- a) NERC Reliability Standards;
- b) SPP Criteria;
- c) Transmission Owner-specific planning criteria as set forth in Section II;
- d) Previously identified and approved transmission projects;
- e) Zonal Reliability Upgrades developed by Transmission Owners, including those that have their own FERC approved local planning process, to meet local area reliability criteria;
- f) Long-term firm transmission service;
- g) Load forecasts, including the impact on load of existing and planned demand management programs, exclusive of demand response resources;
- h) Capacity forecasts, including generation additions and retirements;
- i) Existing and planned demand response resources;
- j) Congestion within SPP and between the SPP Region and other regions and balancing areas;
- k) Renewable energy standards;
- l) Fuel price forecasts;
- m) Energy efficiency requirements;
- n) Other relevant environmental or government mandates; and
- o) Other input requirements identified during the stakeholder process.

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Issued on:

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- fp) The reliability studies shall accommodate and in developing the long term capacity forecasts, the studies will reflect generation and demand response resources which are capable of providing any of the functions assessed in the SPP planning process, and can be relied upon on a long-term basis. Such demand response resources shall be permitted to participate in the planning process on a comparable basis. These studies will consider operational experience gained from markets operated by the Transmission Provider.
 - g) Each annual reliability report shall include a list of the following:
 - i) Regional upgrades required to maintain reliability in accordance with the NERC Reliability Standards and SPP Criteria;
 - ii) Zonal upgrades required to maintain reliability in accordance with more stringent individual Transmission Owner planning criteria; and
 - iii) Inter-regional upgrades developed with neighboring Transmission Providers to meet inter-regional needs, including results from the coordinated system plans.
- 5) Transmission Planning Criteria
- a) Regional Planning Criteria
 - i) The regional planning criteria are comprised of the NERC Reliability Standards and SPP Criteria.
 - ii) The regional planning criteria may change from time to time based upon the then current process for changing reliability criteria.
 - iii) The individual transmission owners shall be obligated under the NERC Reliability Standards and SPP Criteria to resolve reliability violations and compliance needs identified by the Transmission Provider or by the individual transmission owners themselves in accordance with these standards and criteria. The SPP Criteria shall be posted on the SPP website.
 - b) Local Planning Criteria
 - i) Individual Transmission Owners within the SPP Region may develop company-specific planning criteria that, at a minimum, conform to the NERC Reliability Standards and SPP Criteria.
 - ii) For each annual planning cycle, Transmission Owners, including those Transmission Owners that have their own FERC approved local planning process, must provide to the Transmission Provider at least once a year, by April 1st their company-specific planning criteria in order for the need for Zonal Reliability Upgrades to be assessed and included in the SPP Transmission Expansion Plan.
 - iii) Transmission Owner planning criteria and assumptions may be modified at any time provided that, if the planning criteria are made more stringent, the increased requirements will not apply retroactively to studies previously completed or studies already underway by the Transmission Provider. Access to the individual Transmission Owner's planning criteria shall be made available via an electronic link on the SPP website.

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Issued on:

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- 7) Inclusion of Upgrades Related to Transmission Service and Generator Interconnection in Planning Studies
- a) Transmission upgrades related to requests for transmission service are described in Sections 19 and 32 of the Tariff and Attachment Z1 to the Tariff. These upgrades are included as part of the future expansion of the transmission system, upon the execution of the various Service Agreements with the Transmission Customers. Transmission upgrades related to an approved request for transmission service may be deferred or supplemented by other upgrades based upon the results of subsequent studies. Changes in planned upgrades do not remove the obligation of the Transmission Provider to have adequate transmission facilities available to start or continue the approved transmission service.
 - b) Interconnection facilities and other transmission upgrades related to requests for generation interconnection service are described in Attachment V. These upgrades are included as part of the future expansion of the transmission system upon the execution of the various interconnection agreements with the Generation Interconnection Customers. Transmission upgrades related to an approved interconnection agreement may be deferred or supplemented by other upgrades based upon the results of subsequent studies. Changes in planned upgrades do not remove the obligation of the Transmission Provider to have adequate transmission facilities available to start or continue the approved interconnection service.
 - c) The studies performed under this Section III of Attachment O shall accommodate and model the specific long-term firm transmission service of Transmission Customers and specific interconnections of Generation Interconnection Customers no later than when the relevant Service Agreements and interconnection agreements are accepted by the Commission.

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Issued on:

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- iv) The individual planning criteria of each Transmission Owner, including those Transmission Owners that have their own FERC approved local planning process, shall be the basis for determining whether a reliability violation exists for which a need for a new Zonal Reliability Upgrade should be considered.
- v) The Transmission Owner shall apply its local planning criteria comparably to all load in its service territory.

IV Transmission Upgrades That Provide Economic Benefits

Economic upgrades are those transmission upgrades and additions that have been shown to provide customers access to *demand resource, transmission, or* generation options such that the potential energy savings exceed the cost of the proposed transmission upgrade(s). This section describes the process of determining how these upgrades are identified and added to the SPP Transmission Expansion Plan.

1) Overview of the Process

Following is a flow chart of the process to perform the economic assessment and economic planning studies.

8) Process to Analyze Transmission Alternatives for each Assessment

The following shall be performed, at the appropriate time in the respective planning cycle, for the 20 Year Assessment, 10 Year Assessment and Near Term Assessment studies:

- a) The Transmission Provider shall perform the required studies to analyze the potential alternatives for improvements to the Transmission System, provided by the Transmission Provider and by the stakeholders, in order to address the final assessment study scope agreed to with the stakeholders. This analysis shall consider the current and anticipated future needs of the SPP Region within the parameters of the study scope. The analysis shall also consider the value brought to the SPP Region by incremental changes to the proposed solutions.
- b) For all potential alternatives provided by the stakeholders, including reliability upgrades that Transmission Owners, including those Transmission Owners that have their own FERC approved local planning process, propose to address violations of company-specific planning criteria pursuant to Section II.5 of this Attachment O, the Transmission Provider shall determine if there is a more comprehensive regional

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:
20 of 51

solution to address the reliability and economic needs identified in the assessment.

- c) In addition to recommended upgrades, the Transmission Provider will consider, on a comparable basis, any alternative proposals which could include, but would not be limited to, generation options, demand response programs, “smart grid” technologies, and energy efficiency programs. Solutions will be evaluated against each other based on a comparison of their relative effectiveness of performance and economics.

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Issued on:

Effective:
21 of 51

- d) The Transmission Provider shall assess the cost effectiveness of proposed solutions. Such assessments shall be performed in accordance with the Integrated Transmission Planning Manual, which shall be developed by the Transmission Provider, in consultation with stakeholders, and approved by the Markets and Operations Policy Committee. SPP shall post this manual on its website.
- e) The analysis described above shall take into consideration the following:
 - i) The financial modeling time frame for the analysis shall be 40 years (with the last 20 years provided by a terminal value).
 - ii) The analysis shall include quantifying the benefits resulting from dispatch savings, loss reductions, avoided projects, applicable environmental impacts, reduction in required operating reserves, interconnection improvements, congestion reduction, and other benefit metrics as appropriate.
 - iii) The analysis shall identify and quantify, if possible, the benefits related to any proposed transmission upgrade that is required to meet any regional reliability criteria.
 - iv) The analysis scope shall include different scenarios to analyze sensitivities to load forecasts, wind generation levels, fuel prices, environmental costs, and other relevant factors. The Transmission Provider shall consult the stakeholders to guide the development of these scenarios.
 - v) The results of the analysis shall be reported on a regional, zonal and state-specific basis.
 - vi) The analysis shall assess the net impact of the transmission plan, developed in accordance with this Attachment O, on a typical residential customer within the SPP Region and on a \$/kWh basis.
- f) The Transmission Provider shall make a comprehensive presentation of the preferred potential solutions, including the results of the analysis above, to the stakeholder working groups and at a planning summit meeting or web conference. The presentation shall include a discussion of all the Transmission Provider and stakeholder alternatives considered and reasons for choosing the particular preferred solutions.

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Issued on:

Effective:
22 of 51

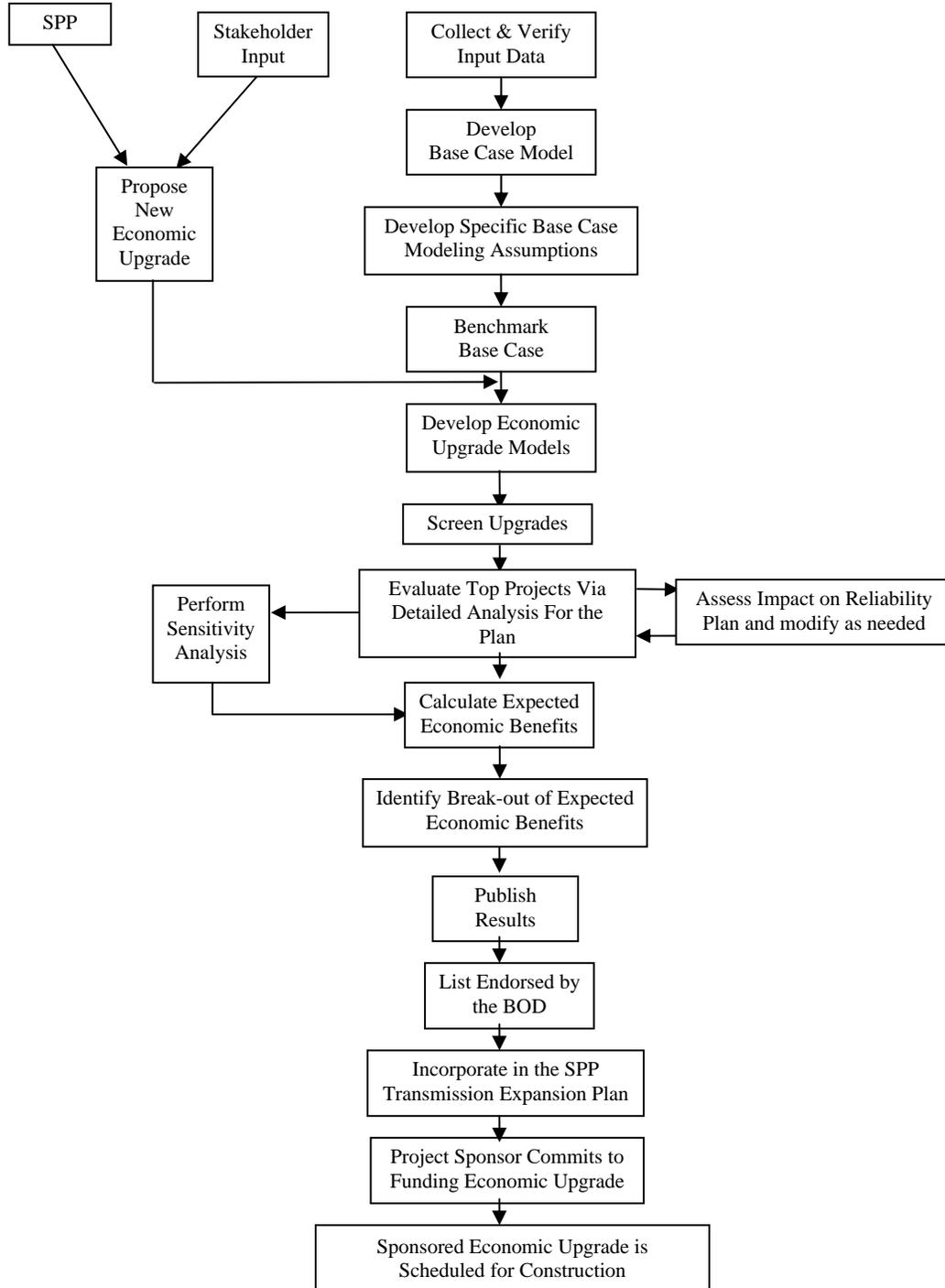
- g) The Transmission Provider shall solicit feedback on the solutions from the stakeholder working groups and through the stakeholders attending the various planning summits. The Transmission Provider will also include feedback from stakeholders through other meetings, teleconferences, web conferences and via email or secure web-based workspace. Stakeholders may propose any combination of demand resources, transmission, or generation as alternative solutions to identified reliability and economic needs.
- h) Upon consideration of the results of the cost effectiveness analysis and feedback received in the subsequent review process, the Transmission Provider shall prepare a draft list of projects for review and approval in accordance with Section V.

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**Economic Assessment and Economic Planning Study
 Process Flow Chart**



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2) Economic Assessment

- a) The Transmission Provider shall perform an economic assessment as part of the planning process described in Section VI.4.e of this Attachment O.
- b) The economic assessment shall be based on the most current planning model(s) and shall address:
 - i) Congestion within the SPP Region;
 - ii) Congestion between the SPP Region and other regions and balancing areas.

IV. Other Planning Studies

1) Sponsored Upgrade Studies

Any entity may request that a Sponsored Upgrade be built. SPP will evaluate the impact of any Sponsored Upgrade on Transmission System reliability and identify any necessary mitigation of these impacts. Such entity must be willing to assume the cost of such Sponsored Upgrade, study costs, and any cost associated with such necessary mitigation. The proposed Sponsored Upgrade will be submitted to the proper stakeholder working group for their review as a part of the transmission planning process.

32) High Priority Studies

- a) The Transmission Provider shall perform high priority studies in accordance with this Attachment O and the Transmission Network Economic Modeling & Methods manual which shall be maintained on the SPP website.
- b) Potential Balanced Portfolios, as developed through the process specified in Sections IV.34 through IV.7, shall be considered to be high priority studies.
- c) The stakeholders may request high priority studies, *including a request for the Transmission Provider to study potential upgrades or other investments necessary to integrate any combination of resources, whether demand resources, transmission, or generation, identified by the stakeholders*. Annually, the costs of up to three high priority studies requested by the stakeholders and performed by the Transmission Provider shall be recovered pursuant to Schedule 1-A of this Tariff. A high priority study of a potential Balanced Portfolio initiated by the Transmission Provider will not be considered a stakeholder request pursuant to this Section IV.32.c.
- d) The Transmission Provider, in consultation with the stakeholders, shall develop the scope for each high priority study and post the scope(s) on the SPP website.
- e) Each study shall include:
 - i) Quantification of benefits and costs in accordance with this Attachment O and the Transmission Network Economic Modeling and Methods manual; and
 - ii) An analysis of the sensitivity of the economics of the upgrades included in the high priority study to changes in assumptions.
- f) The Transmission Provider shall solicit input from the stakeholders and the Regional State Committee regarding the appropriate sensitivity analyses to be performed.

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- g) For each high priority study the Transmission Provider shall publish a report, including but not limited to, the study input assumptions, the estimated cost of the upgrades, *any third party impacts*, the expected economic benefits of the upgrades, and identify reliability impacts, if any, of the upgrades. The report and related studies and the criteria, assumptions and data underlying the report shall be posted on the SPP website, with password protected access if required to preserve the confidentiality of information in accordance with the provisions of the Tariff and the SPP Membership Agreement and to address Critical Energy Infrastructure Information (CEII) requirements. The CEII compliant redacted version of the report shall be posted on the SPP website. The redacted version shall include instructions for acquiring the complete version of the report.
- h) *The Transmission Provider may recommend, based on the results of a high priority study, a high priority upgrade for inclusion in the SPP Transmission Expansion Plan in accordance with the approval process set forth in Section VI.*

43) Identification Evaluation of Potential Economic Upgrades/Balanced Portfolios

- a) The Transmission Provider shall solicit suggestions of potential economic upgrades as outlined in the study scope. The Transmission Provider may also suggest potential economic upgrades. The Transmission Provider shall post the list of all potential economic upgrades on the SPP website, subject to confidentiality requirements. Suggestion of potential economic upgrades does not require the submission of a specific request for transmission service or for interconnection service.

5) Screening Analysis of Potential Economic Upgrades

- a) The Transmission Provider shall perform a screening analysis of the potential economic upgrades.
- b) To perform the screening analysis, the Transmission Provider shall estimate the cost and the benefit of each potential economic upgrade.
- c) The screening analysis shall establish a relative ranking of all potential economic upgrades based on the ratio of the estimated benefit to the estimated cost.
- d) The Transmission Provider shall post a list of all of the potential economic upgrades screened and the results of the screening analysis, including their relative rankings, on the SPP website.
- e) The Transmission Provider shall discuss the results of the screening analysis with the stakeholder working groups and with stakeholders at a planning summit or web conference.

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6) Evaluation of Potential Balanced Portfolios

- a) The Transmission Provider shall solicit input from stakeholders on combinations of potential economic upgrades to be evaluated as potential Balanced Portfolios.
- b) Each economic upgrade to be included in a potential Balanced Portfolio:
 - i) Must include a 345 kV or higher voltage facility;
 - ii) May include lower voltage transmission facilities needed to integrate the 345 kV or higher facilities and achieve the benefits; however, the cost of the lower voltage transmission facilities cannot exceed the cost of the 345 kV or higher facilities included in the economic upgrade; and
 - iii) An economic upgrade that includes lower voltage transmission facilities for which the cost of such facilities exceeds the cost of the 345 kV or higher facilities constituting the economic upgrade may be included in the evaluation of a potential Balanced Portfolio, if a Project Sponsor agrees to bear the portion of the cost of the lower voltage facilities that is in excess of the cost of the 345 kV or higher facilities.
 - iv) Will include an evaluation of the costs of the upgrades, including any cost impacts potentially allocable to the Transmission Provider or a Zone(s) from third party upgrade(s) required to relieve congestion on a neighboring system due to the construction of the potential Balanced Portfolio.
- c) The Transmission Provider shall determine for each Zone the net present value of the revenue requirements of each potential Balanced Portfolio as follows:
 - i) The revenue requirements for each potential Balanced Portfolio shall be calculated as if all of the upgrades associated with the potential Balanced Portfolio are simultaneously available to the power system. This requirement is for evaluation purposes only and shall not restrict the timing of the construction of individual upgrades within a Balanced Portfolio approved by the SPP Board of Directors.
 - ii) Based on input from the Transmission Owners and other pertinent information, the Transmission Provider shall estimate the construction costs of each upgrade in the potential Balanced Portfolio.
 - iii) For each upgrade in the potential Balanced Portfolio, the Transmission Provider shall use the transmission fixed charge rate(s) for the appropriate Transmission Owner(s) to estimate the revenue requirements. In each annual planning cycle, the Transmission Owner shall supply its fixed charge rate to the Transmission Provider.
 - iv) The fixed charge rate(s) shall take account of all costs necessary to support the upgrade in the potential Balanced Portfolio, including but not limited to, operation and maintenance expenses, depreciation, property and payroll taxes, income taxes, if applicable, return on investment and any other factors affecting the revenue requirement associated with the upgrade.

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- v) The revenue requirements also shall include any specific costs that are projected to be incurred by the Transmission Provider or a Zone(s) as a result of third-party impacts (*net of any reimbursements resulting from such third-party impacts*) due to one or more upgrades within a proposed Balanced Portfolio.
 - vi) The revenue requirements for the potential Balanced Portfolio shall equal the sum of the revenue requirements of the upgrades that comprise the potential Balanced Portfolio.
 - vii) The Transmission Provider shall estimate the cost for each Zone by allocating the revenue requirements for the potential Balanced Portfolio to each Zone based on its Region-wide Load Ratio Share forecasted over the ten year period analyzed.
 - viii) If any costs of an upgrade in the potential Balanced Portfolio will be borne by other funding mechanisms, such costs shall not be included in the determination of the net present value of the revenue requirements for the potential Balanced Portfolio.
- d) The Transmission Provider shall determine for each Zone the net present value of the benefits of each potential Balanced Portfolio as follows:
- i) The benefits from each potential Balanced Portfolio shall be calculated as if all of the upgrades associated with the potential Balanced Portfolio are simultaneously available to the power system.
 - ii) The Transmission Provider shall use an adjusted production cost metric to analyze the benefits of the potential Balanced Portfolio, where adjusted production cost is the production cost minus revenues from sales plus cost of purchases. As described in Section IV.8 5 of this Attachment O, the Transmission Provider shall continue to evaluate and explore with the stakeholders any additional metrics and criteria which have quantifiable economic effects.
 - iii) The adjusted production cost benefit for each Zone shall equal the difference between the adjusted production cost with the potential Balanced Portfolio modeled and without the potential Balanced Portfolio modeled.
 - iv) The Transmission Provider shall estimate the annual benefits for each Zone over the same ten-year period as used to determine the costs by calculating the annual benefits for at least three specific years in the ten-year time period and interpolating the annual benefits for the remaining years.
- e) A potential Balanced Portfolio shall meet the following conditions:
- i) **Cost Beneficial:** The sum of the benefits of the potential Balanced Portfolio determined in Section IV.63.d must equal or exceed the sum of the costs determined in Section IV.63.c; and

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- ii) **Balanced:** For each Zone, the sum of the benefits of the potential Balanced Portfolio determined in Section IV.63.d must equal or exceed the sum of the costs determined in Section IV.63.c. Additionally, the balance may be achieved through the provisions set forth in Section IV.74.
- f) In developing a potential Balanced Portfolio, the Transmission Provider shall timely publish a report, including but not limited to, the study input assumptions, the estimated costs included in the potential Balanced Portfolio, and the expected economic benefits of the potential Balanced Portfolio. With regard to such report, the Transmission Provider shall comply with the information sharing and reporting requirements in Part IX VII (Information Exchange) and Section IV.2(3) (High Priority Studies) of this Attachment O, including the requirements for treatment of confidential information.

74) Options for Achieving a Balanced Portfolio

- a) Section IV.7 3 of this Attachment O sets forth provisions to achieve a Balanced Portfolio when there are deficient Zones. A deficient Zone is a Zone where the costs allocated to the Zone in Section IV.63.c exceed the benefits allocated to the Zone in Section IV.63.d, including any additional costs or benefits derived from the application of the provisions in this Section IV.74.

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- b) In order to achieve a Balanced Portfolio, the Transmission Provider may include transmission upgrades that do not adhere to the voltage requirements of Sections IV.63.b.i and ii of this Attachment O.
- c) If including the lower voltage transmission facilities does not achieve a Balanced Portfolio, the Transmission Provider may balance the portfolio by transferring a portion of the Base Plan Zonal Annual Transmission Revenue Requirement and/or the Zonal Annual Transmission Revenue Requirement from the deficient Zone(s) to the Balanced Portfolio Region-wide Annual Transmission Revenue Requirement. Transmission Provider shall include the following constraints in this assessment:
 - i) Limit the amount to be transferred from the Base Plan Zonal Annual Transmission Revenue Requirement and/or the Zonal Annual Transmission Revenue Requirement to the Balanced Portfolio Region-wide Annual Transmission Revenue Requirement to the minimum amount that will balance the portfolio over the ten-year period analyzed;
 - ii) Transfer from the Base Plan Zonal Annual Transmission Revenue Requirement first, then, if necessary, transfer from the Zonal Annual Transmission Revenue Requirement; and
 - iii) For each Zone, meet the conditions specified in Section IV.63.e.ii of this Attachment O.

85) Development of Additional Benefit Metrics

- a) The Transmission Provider shall continue to evaluate and explore with the stakeholders via the transmission planning process any additional metrics and criteria which have quantifiable economic effects, such as:
 - i) Reduction in system losses;
 - ii) Differing environmental impacts;
 - iii) Improvement to capacity margin and operating reserve requirements;
 - iv) Energy, capacity and ancillary service market facilitation;
 - v) Increased competition in wholesale markets;
 - vi) Reliability enhancement, including storm hardening and black start capability; and
 - vii) Critical infrastructure and homeland security.
- b) Any subsequent adjustment to the metrics and criteria for evaluating potential Balanced Portfolios developed by the Transmission Provider, with input from the stakeholders, shall be proposed through Tariff amendments.

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V. Sponsored Upgrades

Any entity may request that a Sponsored Upgrade be built. SPP will evaluate the impact of any Sponsored Upgrade on Transmission System reliability and identify any necessary mitigation of these impacts. Such entity must be willing to assume the cost of such Sponsored Upgrade, study costs, and any cost associated with such necessary mitigation. The proposed Sponsored Upgrade will be submitted to the proper stakeholder working group for their review as a part of the transmission planning process.

V. The SPP Transmission Expansion Plan

The SPP Transmission Expansion Plan shall be a comprehensive listing of all transmission projects in the SPP for the twenty year planning horizon. Projects included in the SPP Transmission Expansion Plan are: 1) upgrades required to satisfy requests for transmission service; 2) upgrades required to satisfy requests for generation interconnection; 3) approved projects from the 20 Year Assessment, 10 Year Assessment and Near Term Assessment (ITP Upgrades); 4) upgrades within approved Balanced Portfolios; 5) approved high priority upgrades; and 6) endorsed Sponsored Upgrades. A specific endorsed Sponsored Upgrade will be included in the Transmission System planning model upon execution of a contract that financially commits a Project Sponsor to such upgrade or when such upgrade is otherwise funded pursuant to the Tariff. To be included in the SPP Transmission Expansion Plan, each project must have been endorsed or approved through its proper process. This Section V describes the process used to approve or endorse the specific upgrades identified in 20 Year, 10 Year and Near Term Assessments, high priority upgrades, and Balanced Portfolios.

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VI. The Annual Planning Process

1) Overview of the Process

Following is a flow chart of the process to develop the SPP Transmission Expansion Plan, the annual planning cycle, and milestones in the cycle.

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2) Commencement of the Process

At the beginning of each annual planning cycle, the Transmission Provider shall initiate the stakeholder process to develop the annual SPP Transmission Expansion Plan. Notice of commencement of the process shall be posted on the SPP website and distributed via email distribution lists.

3) Preparation of the Reliability Assessment

- a) For each annual planning cycle, the Transmission Provider shall develop the assessment study scope with input from the stakeholders.
- b) The assessment study scope shall specify the methodology, criteria, assumptions, and data to be used to develop the list of proposed reliability upgrades.
- c) The Transmission Provider, in consultation with the stakeholder working groups, shall finalize the assessment study scope.
- d) The assessment study scope shall be posted on the SPP website and will be included in the published annual SPP Transmission Expansion Plan report.
- e) In accordance with the assessment study scope, the Transmission Provider shall prepare an assessment of the Transmission System on the basis of maintaining the reliability of the SPP Region and identifying economic opportunities to reduce congestion.
- f) The Transmission Provider shall present the reliability assessment to the stakeholder working groups and the planning summit.
- g) The Transmission Provider shall solicit feedback on the reliability assessment, including potential alternatives for improvements to the Transmission System, from the stakeholder working groups and through the stakeholders attending the various planning summits. The Transmission Provider will also include feedback from stakeholders through other meetings, teleconferences, web conferences and via email or secure web-based workspace. *Stakeholders may propose any combination of demand resources, transmission, or generation as alternative solutions to identified reliability and economic needs.*

4) Analysis of Transmission Alternatives to Address Identified Needs

- a) The Transmission Provider shall perform the required studies to analyze the potential alternatives for improvements to the Transmission System, provided by the Transmission Provider and by the stakeholders, in order to address the reliability and economics identified in the assessment.
- b) For all potential alternatives provided by the stakeholders, including reliability upgrades that Transmission Owners, including those Transmission Owners that have their own FERC approved local planning process, propose to address violations of company-specific planning criteria pursuant to Section III.5.b of this Attachment O, the Transmission Provider shall determine if there is a more comprehensive regional solution to address the reliability and economic needs identified in the assessment.

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- c) *In addition to recommended upgrades, the Transmission Provider will consider, on a comparable basis, any alternative proposals which could include, but would not be limited to, generation options, demand response programs, “smart grid” technologies, and energy efficiency programs. Solutions will be evaluated against each other based on a comparison of their relative effectiveness of performance and economics.*

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- d) The Transmission Provider shall make a comprehensive presentation of the viable potential solutions to the stakeholder working groups and at a planning summit meeting or web conference. The presentation shall include a discussion of the Transmission Provider and stakeholder alternatives considered and reasons for choosing the particular solutions.
- e) The Transmission Provider shall solicit feedback on the solutions from the stakeholder working groups and through the stakeholders attending the various planning summits. The Transmission Provider will also include feedback from stakeholders through other meetings, teleconferences, web conferences and via email or secure web-based workspace.
- f) The Transmission Provider shall review proposed *solutions* that reduce congestion or provide other economic benefits to the region. The screening analysis and inclusion of these *solutions* shall be performed in accordance with Section IV of this Attachment O.
- g) *In addition, the Transmission Provider shall consider the costs and benefits in selecting the potential solutions. The benefits related to each potential solution shall be calculated pursuant to the following guidelines:*
 - i) *The Transmission Provider shall review the scope and assumptions of the analysis with the Cost Allocation Working Group (“CAWG”) and Economic Studies Working Group (“ESWG”).*
 - ii) *The financial modeling time frame for the analysis shall be 40 years (with the last 20 years provided by a terminal value).*
 - iii) *The analysis shall include quantifying the benefits resulting from dispatch savings, loss reductions, avoided projects, reduction in carbon emissions, reduction in required operating reserves, interconnection improvements, congestion reduction, and other benefit metrics developed by the ESWG.*
 - iv) *Special care must be taken to identify and possibly quantify the benefits from reliability improvements of the transmission system.*
 - v) *The benefit analysis scope shall include different scenarios to analyze sensitivities to load forecasts, wind generation levels, fuel prices, carbon prices, and other relevant factors. The CAWG and ESWG should guide the development of these scenarios.*
 - vi) *The benefit analysis shall assess both regional costs and benefits for the SPP Region and the net cost-benefit of each scenario on a zonal and by state basis.*
 - vii) *The benefit analysis shall assess the net impact of the transmission plan, developed in accordance with Attachment O, on a typical residential customer within the SPP Region and on a \$/kWh basis.*

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51) Development of the Recommended SPP Reliability Projects, Balanced Portfolios, *and High Priority Upgrades* Set of Upgrades from Planning Studies

- a) Upon completion of the analysis, studies and stakeholder review and comment on the results in accordance with Sections III and IV of this Attachment O, the Transmission Provider shall prepare a draft list of all projects for review by the stakeholders. The Transmission Provider shall post the draft project list on the SPP website and shall identify the assessment process with which they are associated.
- b) Upon posting of the draft project list, the Transmission Provider shall invite written comments to be submitted to the Transmission Provider.
- c) The Transmission Provider shall review the draft project list with the stakeholder working groups and the Regional State Committee.
- d) Considering the input from the stakeholders through this review process, the Transmission Provider shall prepare a recommended list of proposed ITP Upgrades based upon the analysis as described in Section III, upgrades within proposed Balanced Portfolios, proposed reliability upgrades, *and proposed high priority upgrades* for review and approval.

62) Disclosure of the Proposed List Recommended Set of Upgrades in Proposed Balanced Portfolios, Proposed Reliability Upgrades, *and Proposed High Priority Upgrades* and Supporting Information from Planning Studies

- a) The Transmission Provider shall disclose planning information, which includes the proposed recommended list of proposed upgrades and the underlying studies, by providing:
 - i) All stakeholders equal access, notice and opportunity to participate in planning summits, the stakeholder working group meetings and the sub-regional planning meetings as well as any associated web conferences or teleconferences as set forth in Section III of this Attachment O; and
 - ii) For the contemporaneous availability of such meeting handouts on the SPP website.

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- b) The related study results, criteria, assumptions, analysis results and data underlying the studies used to develop the proposed ITP Upgrades, the list of upgrades within proposed Balanced Portfolios, proposed reliability upgrades, *and proposed high priority upgrades* shall be posted on the SPP website, with password protected access if required to preserve the confidentiality of information in accordance with the provisions of the Tariff and the SPP Membership Agreement and to address CEII requirements. Additionally, Transmission Owner specific local plans and criteria shall be accessible via an electronic link on the SPP website in accordance with Section IX VII of this Attachment O. The CEII compliant redacted version of the SPP Transmission Expansion Plan and individual Transmission Owner specific local plans shall be posted on the SPP website. Redacted versions shall include instructions for acquiring the complete version of the SPP Transmission Expansion Plan and individual Transmission Owner specific local plans. An electronic link shall be provided on the SPP website by which stakeholders may send written comments on the SPP Transmission Expansion Plan and Transmission Owner specific local plans and criteria.

VII. The SPP Transmission Expansion Plan

The SPP Transmission Expansion Plan shall be a comprehensive listing of all transmission projects in the SPP for the ten year planning horizon. Projects included in the SPP Transmission Expansion Plan are: 1) upgrades required to satisfy requests for transmission service; 2) upgrades required to satisfy requests for generation interconnection; 3) approved reliability projects; 4) upgrades within approved Balanced Portfolios; 5) *approved high priority upgrades*; and 6) endorsed Sponsored Upgrades. A specific endorsed Sponsored Upgrade will be included in the Transmission System planning model upon execution of a contract that financially commits a Project Sponsor to such upgrade or when such upgrade is otherwise funded pursuant to the Tariff. To be included in the SPP Transmission Expansion Plan, each project must have been endorsed or approved through its proper process.

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13) Approval and Endorsement Process

- a) The Markets and Operations Policy Committee shall make a recommendation regarding the approval of reliability ITP Upgrades. Approval by the SPP Board of Directors is required for the inclusion of reliability ITP Upgrades in the SPP Transmission Expansion Plan.
- b) The Markets and Operations Policy Committee shall make a recommendation regarding the inclusion of a proposed Balanced Portfolio in the SPP Transmission Expansion Plan. Approval by the SPP Board of Directors is required for inclusion of a Balanced Portfolio in the SPP Transmission Expansion Plan. SPP is not required to have a Balanced Portfolio each year.
- c) If the SPP Board of Directors approves a list of ITP Upgrades, upgrades within Balanced Portfolios, or high priority upgrades other than those recommended by the Markets and Operations Policy Committee, the explanation for the deviation shall be included in the SPP Transmission Expansion Plan.
- d) *The Markets and Operations Policy Committee shall make a recommendation regarding the approval of a high priority upgrade recommended by the Transmission Provider. Approval by the SPP Board of Directors is required for the inclusion of a high priority upgrade in the SPP Transmission Expansion Plan.*
- de) The Markets and Operations Policy Committee shall make a recommendation regarding endorsement of a proposed Sponsored Upgrade. Endorsement by the SPP Board of Directors is required for the inclusion of a Sponsored Upgrade in the SPP Transmission Expansion Plan.
- ef) The list of projects shall be posted on the SPP website by the Transmission Provider. The Transmission Provider shall, in addition to the posting, e-mail notice of such posting to the stakeholders at least ten days prior to a meeting at which the SPP Board of Directors is expected to take action on accepting or modifying the list.
- fg) The list of approved reliability ITP Upgrades, upgrades within approved Balanced Portfolios, *approved high priority upgrades*, and endorsed Sponsored Upgrades may be modified throughout the year by the SPP Board of Directors provided that such action shall be posted and noticed pursuant to this section.
- h) The list of upgrades for transmission service are approved in accordance with the provisions of Attachment Z1 and included in the STEP accordingly.
- i) The list of interconnection facilities and other transmission upgrades related to requests for generation interconnection service are approved in accordance with the provisions of Attachment V and included in the STEP accordingly.

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- g) The SPP Transmission Expansion Plan shall be presented to the SPP Board of Directors at least once a year. Approval of the ITP Upgrades, Balanced Portfolios, reliability upgrades, *and high priority* upgrades and the endorsement of the other projects contained in the SPP Transmission Expansion Plan by the SPP Board of Directors shall certify a regional plan for meeting the transmission needs of the SPP Region.

24) Updates to the SPP Transmission Expansion Plan

- a) Modifications to the SPP Transmission Expansion Plan may be made between the annual approvals as required to maintain system reliability and to meet new business opportunities as they are identified.
- b) The Transmission Provider shall work with the stakeholders on an on-going basis throughout the year analyzing any newly identified issues and incorporating any necessary adjustments to the SPP Transmission Expansion Plan on an out of cycle basis.
- c) On a quarterly basis, the Transmission Provider shall post any modifications to the SPP Transmission Expansion Plan on the SPP website.
- d) The modifications shall be reviewed by the stakeholders and the Regional State Committee, endorsed by the stakeholder working groups, and approved or endorsed by the SPP Board of Directors, in accordance with Sections VI.5 and VII of this Attachment O, respectively.

35) Removal of an Upgrade from the SPP Transmission Expansion Plan.

The Transmission Provider, in consultation with the stakeholders in accordance with Sections VI.5 and VII of this Attachment O, may remove an upgrade from an approved SPP Transmission Expansion Plan. A Transmission Owner that has incurred costs related to the removed upgrade shall be reimbursed for any expenditure pursuant to Section VIII of Attachment J to the Tariff.

46) Status of Upgrades Identified in the SPP Transmission Expansion Plan

- a) The Transmission Provider shall track the status of planned system upgrades to ensure that the projects are built in time or that acceptable mitigation plans are in place to meet customer and system needs.
- b) On a quarterly basis, at a minimum, the Transmission Provider shall:
 - i) Report to the Markets and Operations Policy Committee, the Regional State Committee and the SPP Board of Directors on the status of the upgrades identified in the SPP Transmission Expansion Plan; and
 - ii) Post the status of the upgrades on the SPP website.

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Issued on:

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VIII. Construction of Transmission Facilities

- 1) The Transmission Provider shall not build or own transmission facilities. The Transmission Provider, with input from the Transmission Owners and other stakeholders, shall designate in a timely manner within the SPP Transmission Expansion Plan (“STEP”) one or more Transmission Owners to construct, own, and/or finance each project in the plan.
- 2) Any owner of Transmission Facilities, as defined in Attachment AI of this Tariff, which are or *are capable of being* used by the Transmission Provider to provide transmission service pursuant to Part II and Part III of this Tariff, shall have the right to sign the SPP Membership Agreement as a Transmission Owner and thereby acquire all of the rights and obligations of a Transmission Owner described therein, including all of the rights and obligations of a Transmission Owner described in this Tariff and specifically this Section VIII. Each Transmission Owner and every other entity designated to construct a project by the Transmission Provider pursuant to this Section VIII shall use due diligence to construct transmission facilities as directed by the SPP Board of Directors subject to such siting, permitting, and environmental constraints as may be imposed by state, local and federal laws and regulations, and subject to the receipt of any necessary federal or state regulatory approvals. Such construction shall be performed in accordance with Good Utility Practice, applicable SPP Criteria, industry standards, the applicable Transmission Owner’s specific reliability requirements and operating guidelines (to the extent these are not inconsistent with other requirements), and in accordance with all applicable requirements of federal or state regulatory authorities. Each Transmission Owner shall be fully compensated to the greatest extent permitted by the Commission for the costs of construction undertaken by such Transmission Owner in accordance with this Tariff.
- 3) A specific endorsed Sponsored Upgrade in the SPP Transmission Expansion Plan will be deemed approved for construction upon execution of a contract that financially commits a Project Sponsor to such upgrade.
- 4) After a new transmission project is (i) approved for construction under the SPP Transmission Expansion Plan, or (ii) required pursuant to a Service Agreement, the Transmission Provider shall direct the appropriate Transmission Owner(s) to begin implementation of the project for which financial commitment is required prior to the approval of the next update of the SPP Transmission Expansion Plan. Such direction shall be provided in writing to the Transmission Owner(s) designated to construct the project (“Designated Transmission Owner(s)”). The written notification to the Designated Transmission Owner(s) shall include but not be limited to: (1) the specifications of the project required by the Transmission Provider and (2) a reasonable project schedule, including a project completion date (“Notification to

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:
41 of 51

- 4) After a new transmission project is (i) approved for construction under the SPP Transmission Expansion Plan or (ii) required pursuant to a Service Agreement or (iii) required by a generation interconnection agreement to be constructed by a Transmission Owner(s) other than the Transmission Owner that is a party to the generation interconnection agreement, the Transmission Provider shall direct the appropriate Transmission Owner(s) to begin implementation of the project for which financial commitment is required prior to the approval of the next update of the SPP Transmission Expansion Plan. At the discretion of the SPP Board of Directors, the Transmission Provider may direct the appropriate Transmission Owner(s) to begin implementation of other such approved or required transmission projects for which financial commitment is not required prior to approval of the next SPP Transmission Expansion Plan. Such The direction from the Transmission Provider shall be provided in writing to the Transmission Owner(s) designated to construct the project (“Designated Transmission Owner(s)”). The written notification to the Designated Transmission Owner(s) shall include but not be limited to: (1) the specifications of the project required by the Transmission Provider and (2) a reasonable project schedule, including a project completion date (“Notification to Construct”). If the project forms a connection with facilities of a single Transmission Owner, that Transmission Owner shall be designated to construct the project. If the project forms a connection with facilities owned by multiple Transmission Owners, the applicable Transmission Owners will be designated to provide their respective new facilities. If there is more than one Transmission Owner designated to construct a project, the Designated Transmission Owners will agree among themselves which part of the project will be provided by each entity. If the Designated Transmission Owners cannot come to a mutual agreement regarding the assignment and ownership of the project the Transmission Provider will facilitate their discussion. Each project or segment of a project being built by a single Designated Transmission Owner shall be considered a separate project for purposes of Section VIII.6 and each Designated Transmission Owner will receive a separate Notification to Construct for each project or segment of a project they are responsible to construct.

- 5) Network Upgrade(s) and Distribution Upgrades (as defined in Attachment V to the Tariff) identified in a generation interconnection agreement will be constructed pursuant to the generation interconnection agreement or pursuant to Section VIII.4 of this Attachment O. Network Upgrades and Distribution Upgrades (as defined in Attachment V to the Tariff) identified in a generation interconnection agreement required to be constructed by the Transmission Owner who is a party to the generation interconnection agreement shall be constructed pursuant to the generation interconnection agreement. All other Network Upgrades and Distribution Upgrades (as defined in Attachment V to the Tariff) identified in a generation interconnection agreement to be constructed by Transmission Owners not a party to the generation interconnection agreement shall be constructed pursuant to Section VIII.4 of this Attachment O.

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:
42 of 51

- 6) In order to maintain its right to construct the project, the Designated Transmission Owner shall respond within ninety (90) days after the receipt of the Notification to Construct with a written commitment to construct the project as specified in the Notification to Construct *or a proposal for a different project schedule and/or alternative specifications in its written commitment to construct (“Designated Transmission Owner’s proposal”). The Transmission Provider shall respond to the Designated Transmission Owner’s proposal within ten (10) days of its receipt of the proposal. If the Transmission Provider accepts the Designated Transmission Owner’s proposal, the NTC Notification to Construct will be modified according to the accepted proposal and the Designated Transmission Owner shall construct the project in accordance with the modified Notification to Construct NTC. If the Transmission Provider rejects the Designated Transmission Owner’s proposal, the Designated Transmission Owner’s proposal shall not be deemed an acceptable written commitment to construct the project. However, the Transmission Provider’s rejection of such proposal shall not preclude a Designated Transmission Owner from providing a written commitment to construct the project after such rejection, provided the subsequent written commitment to construct the project is made within the ninety day time period after the issuance of the Notification to Construct NTC.*

If a Designated Transmission Owner does not provide an acceptable written commitment to construct within *the* ninety (90) day period, the Transmission Provider shall solicit and evaluate proposals for the project from other entities and select a replacement designated provider. The Transmission Provider shall solicit proposals from entities that meet certain specified legal, regulatory, technical, financial and managerial qualifications, specifically including the following:

- i) Entities that have obtained all state regulatory authority necessary to construct, own and operate transmission facilities within the state(s) where the project is located,
- ii) Entities that meet the creditworthiness requirements of the Transmission Provider,
- iii) Entities that have signed or are capable and willing to sign the SPP Membership Agreement as a Transmission Owner upon the selection of its proposal to construct and own the project, and
- iv) Entities that meet such other technical, financial and managerial qualifications as are specified in the Transmission Provider’s business practices.

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:

The Transmission Provider shall evaluate each proposal with regard to the cost, reliability and timeliness of the proposed construction of the project and shall make a recommendation to the Board of Directors. The Board of Directors shall thereafter select an entity making a proposal and arrange for that entity to construct the project *and become the Designated Transmission Owner.*

At any time, a Designated Transmission Owner may elect to arrange for another entity or another existing Transmission Owner to build and own all or part of the project in its place subject to the qualifications in Subsections i, ii, iii, and iv above.

Nothing in this Section VIII.6 shall relieve a Transmission Owner of its obligation to construct an upgrade as specified in Section VIII.2 of this Attachment O and Section 3.3(a) of the SPP Membership Agreement in the event that no other qualified entity can be found to construct the project.

IXVII. Information Exchange

- 1) Data Requirements
 - a) Any entity that is subject to the NERC Reliability Standards is required to provide data to the Transmission Provider in accordance the NERC Reliability Standards for Modeling, Data and Analysis (the “NERC MOD Standards”).
 - b) When an entity has developed a preliminary engineering concept for new facilities that impact the interconnected operation of the Transmission System, it shall contact the Transmission Provider so that the optimal integration of any new facilities and potentially benefiting parties can be identified.
 - c) In preparation for the annual update of transmission planning models for each annual planning cycle, Members, Transmission Customers, Transmission Owners, Generation Interconnection Customers and all other stakeholders must provide to the Transmission Provider the data specified in this Section IXVII.
 - d) During the course of the annual planning cycle, if material changes to the data occur, the data owners must provide timely written notice to the Transmission Provider.
 - e) The format required to submit modeling data shall be posted on the SPP website.
 - f) The modeling data shall be posted on the SPP website with password protected access.

- 2) Owners of transmission facilities shall provide to the Transmission Provider:
 - a) Modeling data for power flow, short-circuit and stability analysis;
 - b) Detailed power system models of their transmission systems and provide updates to their models via a password protected web based application;
 - c) Data regarding the design and operation of their transmission facilities;
 - d) Their FERC Form 715;
 - e) Their individual company-specific planning criteria;

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:

- f) Planning grade cost estimates and schedules for upgrades in the SPP Transmission Expansion Plan in a timely manner;
 - g) Their five-year transmission construction plans; and
 - h) Their transmission fixed charge rate.
- 3) Generator owners shall provide to the Transmission Provider:
- a) Modeling data for power flow, short-circuit and stability analysis;

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:

- b) Data for planned additions or upgrades, including status and expected in-service dates, planned retirements and environmental restrictions; and
 - c) Modeling data to perform economic planning studies in accordance with Section IV of this Attachment O. Data required to model generating units for the economic planning studies is documented in the Transmission Network Economic Modeling and Methods manual which shall be posted on the SPP website.
- 4) Transmission Customers
- a) Network Customers shall provide the Transmission Provider an update of the information on its Network Integration Transmission Service application with a ten year forecast of summer and winter load at each delivery point and ten year projection of network resources and with any other information that has changed from the original application.
 - b) Point-to-point Transmission Customers shall provide to the Transmission Provider their good faith projections on their need for service including transmission capacity, duration and points of delivery and receipt over the ten year planning horizon.
 - c) Transmission Customers with existing and planned demand response resources, including demand response resources, shall provide information on such resources
- 5) Neighboring Transmission Providers and RTOs

In accordance with applicable agreements and Section X VIII of this Attachment O, the Transmission Provider shall exchange with neighboring Transmission Providers and RTOs the data required for the development of power flow cases, short-circuit cases and stability cases over the ten year planning horizon.

- 6) Stakeholder Access to Transmission Planning Information
- a) The planning information, data, and models provided pursuant to this Section IX VII shall be sufficient to allow parties to replicate results of the planning studies.
 - b) The Transmission Provider shall provide a secure web-based workspace for hosting and sharing planning information, data, and models.
 - c) The secure web-based workspace shall be password protected and require CEII clearance in accordance with Section IXVII.8 of this Attachment O.
 - d) Instructions to obtain access to the Transmission Provider's power flow models shall be posted on the SPP website.
 - e) Instructions to obtain copies of the Transmission Provider's transmission planning maps shall be posted on the SPP website.

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:

7) Confidentiality Requirements

- a) The Transmission Provider shall make all reasonable efforts to preserve the confidentiality of information in accordance with the provisions of the Tariff and the SPP Membership Agreement.
- b) For those entities that have executed a confidentiality agreement, the Transmission Provider shall provide password protected access to confidential information related to the SPP Transmission Expansion Plan and the underlying studies and models via the SPP website.
- c) The form of confidentiality agreement shall be posted on the SPP website.
- d) *The confidentiality agreement shall allow access to applicable system design software results needed to participate in the SPP Transmission Expansion Plan process, replicate the results of specified transmission planning studies, or to confirm assumptions used in creating adjusted production cost-benefits metrics used to analyze a specified Balanced Portfolio; provided however, if the results include resource specific data (including input data), access will be limited to individuals that are not Competitive Duty Personnel. In no event shall Transmission Provider or any other entity that has executed a confidentiality agreement and has been provided resource specific data disclose such data to Competitive Duty Personnel. For the purposes of this section:*
 - i) *“Competitive Duty Personnel” are any individuals directly engaged in Competitive Duties. Counsel or outside consultants that do not provide consulting services in connection with the direct marketing, purchase, or sale of electric power at wholesale in the SPP Region are not Competitive Duty Personnel.*
 - ii) *“Competitive Duties” include: (1) the marketing, sale, or purchase of electric power at wholesale in the SPP Region; (2) the direct supervision of any employee with such responsibilities; or (3) the provision of consulting services in connection with the marketing, purchase, or sale of electric power at wholesale in the SPP Region.*
- e) Other transmission planning information shall be posted on the SPP website and may be password protected, as appropriate.
- f) Confidentiality agreements shall be required for Members and Market Participants to receive data where the owner of the data has given permission to the Transmission Provider to release the data.

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:
47 of 51

8) Critical Energy Infrastructure Information (CEII) Requirements

- a) The Transmission Provider shall take appropriate steps to protect CEII information.
- b) The Transmission Provider shall screen Members and Market Participants prior to providing access to CEII information. Individuals that do not belong to a confirmed pre-screened Member or Market Participant shall be directed to the Commission's website for instructions for access to CEII information.
- c) For those entities that have met the CEII requirements in Section IX.8.b of this Attachment O, the Transmission Provider shall provide password protected access to CEII information related to the SPP Transmission Expansion Plan and the underlying studies and models via the SPP website.
- d) The Transmission Provider shall follow the guidelines set forth by the Commission to flag data which shall be treated as CEII sensitive.

XVIII. Inter-regional Coordination

- 1) The Transmission Provider shall undertake to coordinate any studies required to assure the reliable, efficient, and effective operation of the Transmission System with, at a minimum, first-tier adjacent interconnected systems. Such coordination shall include:

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:
48 of 51

- a) Sharing system plans to ensure that such plans are simultaneously feasible and otherwise use consistent assumptions and data; and
 - b) Identifying system enhancements that could relieve inter-regional congestion or integrate new resources on an aggregate basis.
- 2) The Transmission Provider shall undertake to coordinate any studies with other transmission providers primarily through participation in the agreements listed in Addendum 1 to this Attachment O.
 - 3) On an annual basis, the Transmission Provider shall review the ongoing planning activities under the agreements specified in Addendum 1 to this Attachment O to determine the need for any additional inter-regional studies. The Transmission Provider shall share this review with the stakeholders at a planning summit and solicit input regarding additional inter-regional studies that should be initiated by the Transmission Provider.

XIIX. Recovering Costs Associated with the Planning Process

- 1) The Transmission Provider's costs associated with the planning process and associated studies set forth in this Attachment O shall be recovered pursuant to Schedule 1-A of the Tariff.
- 2) The Transmission Provider's costs associated with studies for potential Sponsored Upgrades, shall be the responsibility of the entities requesting such studies.
- 3) The Transmission Provider's costs for studies associated with requests for long-term firm transmission service shall be recovered pursuant to Sections 19 and 32 of the Tariff.
- 4) The Transmission Provider's costs for studies associated with requests for interconnection service shall be recovered pursuant to Attachment V of the Tariff.

XII. Cost Allocation

The costs associated with new or upgraded transmission facilities shall be allocated in accordance with Attachment J to the Tariff.

XIII. Dispute Resolution

Any dispute regarding the planning process shall be resolved utilizing the procedures identical to those set forth in Section 12 of the Tariff.

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:

**ADDENDUM 1 TO ATTACHMENT O
INTER-REGIONAL COORDINATION AGREEMENTS**

In accordance with Section X VIII of Attachment O, the Transmission Provider shall undertake to coordinate any studies with other transmission providers primarily through participation in the agreements listed below:

- 1) The Joint Operating Agreement between the Midwest Independent Transmission System Operator, Inc. (MISO) and Southwest Power Pool, Inc. (SPP);
- 2) The Transmission Coordination Agreement between the Associated Electric Cooperative, Inc. (AECI) and the Southwest Power Pool, Inc. (SPP);
- 3) The United States Department of Energy Southwestern Power Administration Agreement Between United States of America and Southwest Power Pool, Inc. (the “SPA Agreement”);
- 4) The Eastern Interconnection Reliability Assessment Group; and
- 5) Bilateral agreements between the Transmission Provider and transmission systems to which the SPP Region is interconnected.

SPP shall continue its efforts to formalize and improve seams agreements with its neighbors and affected systems to facilitate inter-regional and interconnection wide transmission planning and expansion.

Issued by: Heather H. Starnes, Manager, Regulatory Policy

Issued on:

Effective:
50 of 51

