

Transmission Planning Process (Attachment K)

BPA Transmission Business Practice

Version 2
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BPA Policy Reference

- [Open Access Transmission Tariff \(OATT\)](#): Attachment K

For more information, visit the [BPA Transmission Business Practices webpage](#) or submit questions to techforum@bpa.gov.

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A. Background

1. This Business Practice supplements Attachment K of the BPA Open Access Transmission Tariff (OATT) by describing: (i) the process for submitting an Economic Study request during the BPA Planning Process; (ii) the format and procedures for submitting the customer information required under Attachment K section III.6.1 and (iii) the procedures for protecting and accessing Confidential Information (which may include Critical Information or Critical Energy Infrastructure Information) during the BPA Planning Process.
2. Attachment K, consistent with the FERC Order 890 and 1000 transmission planning mandates, outlines the BPA Planning Process. The BPA Planning Process is an annual transmission planning process which includes performing a system assessment, identifying conceptual solutions, developing plans of service and updating the BPA Plan. The BPA Plan is a document describing the need, preferred solutions, estimated costs and schedules of possible transmission system reinforcements and upgrades over a 10-year planning horizon.
3. The BPA Planning Process also incorporates the specific plans for facilities needed to provide requested interconnection or transmission service on BPA’s system that are identified through the interconnection and transmission service request study planning processes.
4. This Business Practice addresses only the topics listed above in Section A.1 and does not contain a comprehensive description of the process for stakeholder participation in the BPA Planning Process. Stakeholders should consult Attachment K for additional information about stakeholder participation, including information about stakeholder planning meetings and postings of planning information. Participation in the BPA Planning Process is open to all interested parties, including but not limited to all

transmission and interconnection customers, state authorities, tribal representatives, and other stakeholders.

B. Submitting Economic Study Requests

1. Purpose and scope of Economic Studies.
 - a. Economic Studies are intended to give the requestor(s) an indication of the scope of facilities that may be required to provide interconnection or relieve congestion in order to provide adequate transmission capacity. In addition, Economic Studies using production cost modeling analysis can be used to identify and evaluate the production cost benefits of relieving congestion.
 - b. Economic Studies cannot, of themselves, result in the award of transmission service. Economic Studies do not create an obligation for BPA Transmission Services to develop any transmission reinforcements considered in the Economic Studies, nor do they obligate the requestor(s) to accept any offer of transmission.
2. Process for submitting Economic Study requests.
 - a. Any customer, group of customers, interested person or parties, or the BPA Transmission Services' planning function, may submit Economic Study Requests to BPA Transmission Services.
 - b. All requests shall be submitted to BPA Transmission Services electronically by filling out the Economic Study Request form linked on the System Planning page of its OASIS website under Attachment K Planning Process and emailing the completed form to planningeconomicstudyrequest@bpa.gov. All requests must be submitted by October 31 annually for performance of studies in the following year.
 - c. Each individual request for an Economic Study shall be limited to a single Point of Receipt (POR) and a single Point of Delivery (POD) on the interconnected transmission system. Requestor(s) may ask for multiple levels of aggregated generation or load to be studied at the requested POR or POD.
 - d. BPA Transmission Services will post each request for an Economic Study on the System Planning page of its OASIS website.
3. BPA Transmission Services will review and prioritize submitted Economic Studies, and perform the selected Economic Studies, using the procedures described in Attachment K section III.3.
4. BPA Transmission Services will forward Economic Study requests requiring production cost modeling analysis to NorthernGrid for review, prioritization, and performance of studies. The actual cost of such study will be borne by BPA Transmission Services.

C. Format & Procedures for Submitting Customer Information

1. Network (NT) Customer Data.
 - a. NT Customers currently satisfy their Attachment K Part III Section 6.1.1 obligation to provide NT Customer data by submitting load and resource forecasts annually to the BPA Load Forecasting and Analysis group, as

described in the Network Integration Transmission (NT) Service Business Practice.

- b. NT Customers may be required to provide additional information—including the identification of projected demand response reductions and any other data reasonably required in connection with planning activities—to BPA Transmission Services in response to a general or customer-specific data request. If BPA Transmission Services issues a general or customer-specific data request, the request will include instructions about the timing and format of the requested response.
2. Point-to-Point and Grandfathered Transmission Service Customer Data.
 - a. Point-to-Point customers and entities receiving Grandfathered Transmission Service may be requested to provide data to BPA Transmission Services through a general or customer-specific data request as described below.
 - b. General data requests.
 - i. Point-to-Point customers and entities receiving Grandfathered Transmission Service may be requested to provide the following data to BPA Transmission Services on an annual basis:
 1. Projections of need for Point-to-Point Transmission Service or other transmission service for at least the following 10-year period, including transmission capacity, duration, receipt and delivery points, and location of generation sources and sinks; and
 2. Any other data reasonably requested by BPA Transmission Services during the BPA Planning Process.
 - ii. If BPA Transmission Services issues annual general data requests, it will post or send the general data requests to all Point-to-Point and Grandfathered Transmission Service customers no later than January. Such requests may include notice that customer-specific data requests will follow. Customer response to the general data request is due no later than March 1.
 - c. Customer-specific data requests.
 - i. In addition to the general data requests posted or sent to all Point-to-Point and Grandfathered Transmission Service customers, BPA Transmission Services may send specific data requests to individual customers.
 - ii. These customer-specific data requests may include BPA Transmission Services' current power flow representation information for each customer. Customers are requested to update the power flow information and return it to BPA Transmission Services in the original power flow representation format no later than March 1.
 - iii. If BPA Transmission Services requests other specific information, the request will include instructions about the timing and format of the requested response.
3. Demand Response Resource Data.
 - a. Any customer, interested person, or other stakeholder may provide BPA Transmission Services the following data about any demand response resource

or other non-transmission alternative for consideration by BPA Transmission Services in the BPA Planning Process:

- i. Existing and planned demand response resources and any other non-transmission alternatives and their impacts on forecasted demand and peak demand reduction; and
- ii. Any other data reasonably requested from such stakeholder by BPA Transmission Services in connection with the BPA Planning Process.
- b. Customers, interested persons or other stakeholders who want to provide the above data for consideration in the BPA Planning Process may submit such data by email to PlanningParticipationRequest@bpa.gov.
4. Customers and interested persons may submit proposed modifications to previously provided customer data and assumptions so that such changes may be considered in the BPA Planning Process. Proposed changes may be submitted by email to PlanningParticipationRequest@bpa.gov.

D. Protecting & Accessing Confidential Information

1. Protecting Confidential Information (includes Critical Information and Critical Energy Infrastructure Information).
 - a. If a customer, interested party, stakeholder, or BPA submits information that it believes to be Confidential Information, it should clearly mark those parts of the submitted information that it considers to be Confidential Information.
 - b. BPA Transmission Services' studies, data and assumptions may contain Confidential Information. To protect such Confidential Information, BPA Transmission Services will:
 - i. Post notice of the availability of study results documents on the System Planning page of OASIS website rather than posting the documents directly; and
 - ii. Control access to the documents using the information control procedures described below.
2. Access to Confidential Information is subject to the following information control procedures:
 - a. Interested parties must submit a written request via email to PlanningParticipationRequest@bpa.gov. Requests must include a detailed statement explaining the need and intended use of the requested information. BPA Transmission Services may contact the requestor to verify that they have a valid need for the information.
 - b. BPA Transmission Services will evaluate the request and, depending on the nature of the Confidential Information at issue, may require the execution of a Non-Disclosure Agreement or completion of an attestation to comply with the Federal Information Security Management Act (FISMA attestation). If the requested data is in BPA Transmission Services' possession but belongs to another entity, BPA Transmission Services refers the requestor directly to the information owner.