

Southern Intertie Study Process

BPA Transmission Business Practice

Version 1
10/1/2021

Southern Intertie Study Process

Version 1

This business practice describes the requirements and processes for conducting studies to increase capacity on the Southern Intertie.

BPA Policy References

- [Open Access Transmission Tariff \(OATT\)](#): 13.5; 15.2; 15.4(a); 17.5; 19.1; 21.1; 21.2

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

Table of Contents

| | |
|---------------------------|---|
| A. Overview..... | 1 |
| B. Southern Intertie..... | 2 |

A. Overview

1. BPA performs System Impact Studies, System Facilities Studies, and/or Cluster Studies for Long-Term Firm (LTF) Transmission Service Requests (TSRs) when there is insufficient capacity to award service without a transmission system upgrade, except as noted below for the Southern Intertie.
 - a. For information on how BPA performs studies for LTF TSRs impacting the BPA Network refer to the TSR Study and Expansion Process (TSEP) Business Practice.
2. BPA will perform studies to increase capacity at either its discretion or upon Customer request as described below.
3. If a LTF TSR requires a transmission system upgrade that will necessitate a rating increase of a path included in the Western Electricity Coordinating Council (WECC) path rating catalogue, Transmission Provider(s) at both ends of the intertie must agree to participate in the WECC study process.
 - a. The Customer will be required to advance fund the WECC study process as well as any other required agreements to maintain a valid completed application. These additional studies may be able to be performed at the same time as the System Facilities Study.
 - b. These studies will take a minimum of 12 to 18 months.

B. Southern Intertie

1. The Southern Intertie is comprised of the Northwest AC Intertie and the Pacific DC Intertie.
2. Customer may request a study of any of the Customer's LTF TSR(s) in STUDY status on OASIS which impact the Southern Intertie.
 - a. A formal request stating the AREF(s) of the TSR(s) to be studied must be submitted via email to the Customer's assigned Transmission Account Executive.
 - b. Upon receipt of the Customer's formal request, BPA will:
 - i. Post a notice on OASIS that a study request has been submitted and a Cluster Study on the Southern Intertie may be performed.
 - ii. Tender a study agreement to the requesting Customer within 30 Business Days. This study agreement will define the Customer's obligations to perform third party coordination with all impacted Transmission Providers and capacity or facility owners.
 - a. If the requesting Customer fails to execute and fund the study agreement within 15 Calendar Days, including provision of a data exhibit if BPA requests additional information, and meet the third party coordination requirements defined in the study agreement, if applicable, within 60 Calendar Days, their TSR(s) will be DECLINED and removed from BPA's LTF pending queue.
 - b. If the requesting Customer executes and funds the study agreement, and meets the third party coordination requirements, their TSR(s) will be considered eligible for an intertie study.
 - c. Once the requesting Customer has met the third party coordination requirements and appropriate third parties have agreed to participate in the study, BPA will tender a study agreement to the following Customers with LTF TSRs in STUDY status impacting the same portion of the Southern Intertie (either the Northwest AC Intertie or the Pacific DC Intertie):
 - i. LTF TSRs submitted prior to that of the Customer requesting a study; and
 - ii. LTF TSRs submitted after that of the Customer requesting a study which BPA determines on a case-by-case basis will ensure the most efficient use of study resources.
 - iii. Affected Customers will not be obligated to perform third party coordination, as the requesting Customer will be required to conduct the necessary coordination.
 - iv. Affected Customers will be required to execute and fund the study agreement, including provision of a data exhibit if BPA requests additional information, or have their TSR(s) DECLINED and removed from BPA's LTF pending queue.
 - d. At the conclusion of a study:

- i. If the requesting Customer elects not to proceed to the next phase, the study effort shall be terminated and any affected Customers will retain their queue position.
 - ii. If the requesting Customer executes the next phase agreement, all affected Customers will receive an agreement as well. If the study agreement is not executed, the TSR(s) will be DECLINED and removed from BPA's LTF pending queue.
3. If a study will be performed at BPA's discretion, BPA will post a notice on OASIS and tender a study agreement to Customers with LTF TSRs in STUDY status impacting that portion of the Southern Intertie.
 - a. Affected Customers will not be obligated to perform third party coordination, as BPA will conduct the necessary coordination.
 - b. Affected Customers will be required to execute and fund the study agreement, including provision of a data exhibit if BPA requests additional information, or have their TSR(s) DECLINED and removed from the LTF pending queue.
4. BPA will use due diligence to perform studies per the tariff prescribed timelines, however, studies must be coordinated with all impacted third party Transmission Providers and this will likely result in delays that are outside of BPA's control.