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**CALIFORNIA INDEPENDENT SYSTEM  
OPERATOR**

**PRO FORMA  
METER SERVICE AGREEMENT  
FOR ISO METERED ENTITIES**

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## METER SERVICE AGREEMENT FOR ISO METERED ENTITIES

THIS AGREEMENT is dated this \_\_\_ day of \_\_\_\_\_, 19\_\_ and is entered into, by and between:

(1) [Full legal name] having its registered and principal place of business located in [Address] (the "ISO Metered Entity");

and

(2) California Independent System Operator Corporation, a California nonprofit public benefit Corporation having a principal executive office located at such place in the State of California as the ISO Governing Board may from time to time designate, initially 151 Blue Ravine Road, Folsom, California 95630 (the "ISO").

The ISO Metered Entity and the ISO are hereinafter referred to as the "Parties".

Whereas:

- A. Section 10.3.1 of the ISO Tariff requires the ISO to establish meter service agreements with ISO Metered Entities for the collection and transfer of Meter Data.
- B. Section 10.2.4 of the ISO Tariff further provides that an ISO Metered Entity shall certify its revenue quality meters and Section 10.2.1 provides that ISO Metered Entities shall make Meter Data available to MDAS.
- C. The Parties are entering into this Agreement in order to establish the terms and conditions upon which the ISO and the ISO Metered Entity shall discharge their respective duties and responsibilities pursuant to this Agreement and the ISO Tariff.
- D. All obligations and responsibilities included in this Agreement may be set forth in further detail in the Metering Protocol of the ISO Tariff.

NOW THEREFORE, in consideration of the mutual covenants set forth herein, THE PARTIES AGREE as follows:

**ARTICLE I  
DEFINITIONS AND INTERPRETATION**

**1.1 Master Definitions Supplement.** All terms and expressions used in this Agreement shall have the same meaning as those contained in the Master Definitions Supplement to the ISO Tariff.

**1.2 Special Definitions for this Agreement.** In this Agreement, the following words and expressions shall have the meanings set forth below:

**“Authorized Users”** means users authorized by the ISO Metered Entity to access the Meter Data of that ISO Metered Entity held by the ISO.

**“ISO Authorized Inspector”** has the meaning as defined in the Metering Protocol of the ISO Tariff.

**“ISO Metered Entity”** means:

(a) any one of the following entities that is directly connected to the ISO Controlled Grid:

- i. a Generator other than a Generator that sells all of its Energy (excluding any Energy consumed by auxiliary load equipment electrically connected to that Generator at the same point) and Ancillary Services to the UDC in whose Service Area it is located;
- ii. an Eligible Customer; or
- iii. an End-User other than an End-User that purchases all of its Energy from the UDC in whose Service Area it is located; and

(b) any one of the following entities:

- i. a Participating Generator; or
- ii. a Participating TO in relation to its Tie Point Meters with other TOs or Control Areas.

**“Metering Protocol”** means the Protocol of the ISO Tariff on the subject of revenue quality metering which sets forth requirements and procedures that ISO Metered Entities, among others, shall meet and follow in order to comply with their obligations under Section 10 and Appendix J of the ISO Tariff.

**“MDAS”** means the ISO revenue metering data acquisition and processing system.

**“Metering Facilities” means revenue quality meters, instrument transformers, secondary circuitry, secondary devices, meter data servers, related communication facilities and other related local equipment.**

**“SC” means Scheduling Coordinator.**

**1.3 Rules of Interpretation. The following rules of interpretation and conventions shall apply to this Agreement:**

- (a) if there is any inconsistency between this Agreement and the ISO Tariff, the ISO Tariff will prevail to the extent of the inconsistency;
- (b) the singular shall include the plural and vice versa;
- (c) the masculine shall include the feminine and neutral and vice versa;
- (d) “includes” or “including” shall mean “including without limitation”;
- (e) references to a section, article or schedule shall mean a section, article or a schedule of this Agreement, as the case may be, unless the context otherwise requires;
- (f) a reference to a given agreement or instrument shall be a reference to that agreement or instrument as modified, amended, supplemented or restated through the date as of which such reference is made;
- (g) unless the context otherwise requires, references to any law shall be deemed references to such law as it may be amended, replaced or restated from time to time;
- (h) unless the context otherwise requires, any reference to a “person” includes any individual, partnership, firm, company, corporation, joint venture, trust, association, organization or other entity, in each case whether or not having separate legal personality;
- (i) unless the context otherwise requires, any reference to a Party includes a reference to its permitted successors and assigns;
- (j) any reference to a day, week, month or year is to a calendar day, week, month or year;
- (k) the captions and headings in this Agreement are inserted solely to facilitate reference and shall have no bearing upon the interpretation of any of the terms and conditions of this Agreement; and
- (l) references to the Metering Protocol of the ISO Tariff and other ISO Documents shall be interpreted in accordance with any exceptions or exemptions to such as may have been granted by the ISO.

## ARTICLE II TERM AND TERMINATION

- 2.1 **Effective Date.** This Agreement shall be effective as of the latter of the ISO Operations Date, the date of execution of this Agreement, or the date it is accepted and made effective by FERC and shall remain in full force and effect until terminated by operation of law or pursuant to Section 2.2 of this Agreement.
- 2.2 **Termination**
- 2.2.1 **Termination by ISO.** Subject to Section 4.2, the ISO may terminate this Agreement by giving written notice of termination in the event that the ISO Metered Entity commits any default under this Agreement and/or the ISO Tariff which, if capable of being remedied, is not remedied within thirty (30) days after the ISO has given it written notice of the default, unless excused by reason of Uncontrollable Force in accordance with Section 15 of the ISO Tariff. With respect to any notice of termination given pursuant to this Section, the ISO must file a timely notice of termination with FERC. This Agreement shall terminate upon acceptance by FERC of such notice of termination.
- 2.2.2 **Termination by ISO Metered Entity.** In the event that the ISO Metered Entity wishes to terminate this Agreement, the ISO Metered Entity shall give the ISO ninety (90) days written notice provided, however, that the ISO Metered Entity shall have the right to modify Schedule 1 which, in accordance with Section 3.2.2, shall not constitute an amendment to this Agreement, and such modification shall be effective upon receipt of notice by the ISO. With respect to any notice of termination given pursuant to this Section, the ISO must file a timely notice of termination with FERC. This Agreement shall terminate upon acceptance by FERC of such notice of termination.

## ARTICLE III GENERAL TERMS AND CONDITIONS

- 3.1 **Agreement Subject to ISO Tariff.** This Agreement shall be subject to the provisions of the ISO Tariff which shall be deemed to be incorporated herein, as the same may be changed or superseded from time to time. The Parties agree that they will comply with the provisions of Section 10 of the ISO Tariff and the Metering Protocol of the ISO Tariff.

### 3.2 Obligations and Rights of the ISO Metered Entity.

- 3.2.1 **Submission of Meter Data through MDAS.** The ISO Metered Entity agrees to make available to the ISO through MDAS its Meter Data in accordance with the ISO Tariff. The ISO's requirements regarding the frequency with which it requires Meter Data to be made available to it through MDAS by the ISO Metered Entity are referred to in the Metering Protocol of the ISO Tariff.
- 3.2.2 **Meter Information.** The ISO Metered Entity shall provide in the format prescribed by Schedule 1 to this Agreement the required information with respect to all of its meters used to provide Meter Data to the ISO. The ISO Metered Entity must immediately notify the ISO of any changes to the information provided to the ISO in accordance with this Section 3.2.2 and provide the ISO with any information in relation to such change as reasonably requested by the ISO. The ISO Metered Entity shall have the right to modify Schedule 1, such modification shall not constitute an amendment to this Agreement.
- 3.2.3 **Transformer and/or Line Loss Correction Factors.** If the ISO Metered Entity uses low voltage side metering, it shall use the ISO approved transformer and/or line loss correction factor referred to in the Metering Protocol of the ISO Tariff.
- 3.2.4 **Rights to Access Metering Facilities.** The ISO Metered Entity shall use its best efforts to procure any rights necessary for the ISO to access all Metering Facilities of the ISO Metered Entity to fulfill its obligations under the ISO Tariff and its obligations under this Agreement. If, after using its best efforts, the ISO Metered Entity is unable to provide the ISO with such access rights, the ISO Metered Entity shall ensure that one of its employees is an ISO Authorized Inspector and such employee undertakes, at the ISO's request, the certification, testing, inspection and/or auditing of those Metering Facilities in accordance with the procedures established pursuant to the Metering Protocol of the ISO Tariff, including the requirement to complete and provide to the ISO all necessary documentation. The ISO acknowledges that it will not be prevented from fulfilling its obligations under the ISO Tariff or this Agreement by reason of the fact that it is provided with escorted access to the Metering Facilities of the ISO Metered Entity.

- 3.2.5 Security and Validation Procedures.** The security measures and the validation, editing and estimation procedures that the ISO will apply to Meter Data made available to the ISO by the ISO Metered Entity shall be as referred to in the Metering Protocol of the ISO Tariff.
- 3.3 Obligations and Rights of the ISO.**
- 3.3.1 Direct Polling of MDAS.** The ISO shall allow the SC representing the ISO Metered Entity and all Authorized Users to directly poll MDAS for the Meter Data relating to the ISO Metered Entity in accordance with the procedures referred to in the Metering Protocol of the ISO Tariff.
- 3.3.2 ISO as Third-Party Beneficiary.** The ISO shall be a third-party beneficiary to any future agreement between the ISO Metered Entity and any other party relating to the Metering Facilities of the ISO Metered Entity for the purpose of granting the ISO access to any relevant information, records and facilities as needed by the ISO to fulfill its obligations under the ISO Tariff and its obligations under this Agreement.
- 3.3.3 Remote and Local Access to Metering Data.** The ISO shall provide the ISO Metered Entity any password or other requirements necessary for the ISO Metered Entity to access its Metered Data remotely or locally at the Meter.
- 3.4 Exemptions Granted by the ISO.** Any exemptions provided for under the ISO Tariff that are granted by the ISO shall be set forth in Schedule 2 of this Agreement. Any amendment or addition to Schedule 2 shall not constitute an amendment to this Agreement.

#### ARTICLE IV PENALTIES AND SANCTIONS

- 4.1 Penalties.** If an ISO Metered Entity provides inaccurate or incorrect Meter Data or fraudulent Meter Data to the ISO, the ISO shall be entitled to impose penalties and sanctions, including but not limited to suspension of trading rights following 14 days written notice to the ISO Metered Entity. Fraudulent Meter Data means any Meter Data provided to the ISO by the ISO Metered Entity that it knows to be false, incorrect or incomplete at the time it provided that Meter Data to the ISO. All penalties and sanctions shall be set forth in Schedule 4 Part A to this Agreement. No penalties or sanctions, including suspension of trading rights, may be imposed under this Agreement unless a Schedule providing for such penalties or sanctions has

first been filed with and made effective by FERC. Nothing in the Agreement, with the exception of the provisions relating to ADR, shall be construed as waiving the rights of the ISO Metered Entity to oppose or protest any penalty proposed by the ISO to the FERC or the specific imposition by the ISO of any FERC-approved penalty on the ISO Metered Entity.

- 4.2 **Corrective Measures.** If the ISO Metered Entity fails to meet or maintain the standards for Metering Facilities or comply with the audit or test procedures as referred to in the ISO Tariff, the ISO shall be permitted to take corrective measures. The corrective measures and rights the ISO may exercise upon any failure by any entity to meet those standards for Metering Facilities or to comply with the audit or test procedures shall be set forth in Schedule 4 Part B.

## ARTICLE V ACCESS TO METERING DATA

- 5.1 **Authorized Users.** In addition to the persons referred to in the ISO Tariff, including the ISO Metered Entity and the relevant Scheduling Coordinator, as being entitled to access Meter Data on MDAS, the ISO Metered Entity may set forth in Schedule 3 of this Agreement any additional authorized users that shall be entitled to access the ISO Metered Entity's Settlement Quality Meter Data held by the ISO. The ISO Metered Entity shall include in Schedule 3 as authorized users the relevant UDCs and TOs. The ISO shall provide the authorized users with any password or other information necessary to access the ISO Metered Entity's Settlement Quality Metered Data held by the ISO on MDAS. Any amendment or addition to Schedule 3 shall not constitute an amendment to this Agreement.

## ARTICLE VI COSTS

- 6.1 **Certification, Inspection and Auditing of Meters.** The ISO Metered Entity shall be responsible for all reasonable costs incurred by the ISO or an ISO Authorized Inspector in connection with them carrying out the certification, inspection, testing or auditing of the meters identified in Schedule 1 from which the ISO Metered Entity provides Meter Data to the ISO. The ISO or ISO Authorized Inspector will furnish the ISO Metered Entity, upon request, an itemized bill for such costs.



## ARTICLE VI DISPUTE RESOLUTION

- 7.1 **Dispute Resolution.** The Parties shall make reasonable efforts to settle all disputes arising out of or in connection with this Agreement. In the event any dispute is not settled, the Parties shall adhere to the ISO ADR Procedures set forth in Section 13 of the ISO Tariff, which is incorporated by reference, except that all reference in Section 13 of the ISO Tariff to Market Participants shall be read as a reference to the ISO Metered Entities and references to the ISO Tariff shall be read as references to this Agreement.

## ARTICLE VII REPRESENTATIONS AND WARRANTIES

- 8.1 **Representations and Warranties.** Each Party represents and warrants that the execution, delivery and performance of this Agreement by it has been duly authorized by all necessary corporate and/or governmental actions, to the extent authorized by law.
- 8.2 The ISO Metered Entity represents that all necessary approvals, permits, licenses, easements, right of way or access to install, own and operate its meters have been or will be obtained by the ISO Metered Entity.

## ARTICLE IX LIABILITY AND INDEMNIFICATION

- 9.1 **Liability and Indemnification.** The provisions of Section 14 of the ISO Tariff will apply to liability arising under this Agreement, except that all references in Section 14 of the ISO Tariff to Market Participants shall be read as references to the ISO Metered Entity and references to the ISO Tariff shall be read as references to this Agreement.

## ARTICLES X UNCONTROLLABLE FORCES

- 10.1 **Uncontrollable Forces Tariff Provisions.** Section 15 of the ISO Tariff shall be incorporated by reference into this Agreement except that all references in Section 15 of the ISO Tariff to Market Participants shall be read as references to the ISO Metered Entity and all references to the ISO Tariff shall be read as references to this Agreement.

## ARTICLE XI MISCELLANEOUS

- 11.1 **Assignments.** Either Party may assign or transfer any or all of its rights and/or obligations under this Agreement with the other Party's prior written consent in accordance with Section 17 of the ISO Tariff. Such consent shall not be unreasonably withheld. Any such transfer or assignment shall be conditioned upon the successor in interest accepting the rights and/or obligations under this Agreement as if said successor in interest was an original Party to this Agreement.
- 11.2 **Notices.** Any notice, demand or request which may be given to or made upon either Party regarding this Agreement shall be made in accordance with Section 20.1 of the ISO Tariff. A Party must update the information in Schedule 5 as information changes. Such changes shall not constitute an amendment to this Agreement.
- 11.3 **Waivers.** Any waiver at any time by either Party of its rights with respect to any default under this Agreement, or with respect to any other matter arising in connection with this Agreement, shall not be deemed a waiver with respect to any subsequent default or other matter arising in connection with this Agreement. Any delay short of the statutory period of limitations, in asserting or enforcing any right under this Agreement shall not constitute or be deemed a waiver of such right.
- 11.4 **Governing Law and Forum.** This Agreement shall be deemed to be a contract made under and for all purposes shall be governed by and construed in accordance with the laws of the State of California, except its conflict of law provisions. The Parties irrevocably consent that any legal action or proceeding arising under or relating to this Agreement to which the ISO ADR Procedures do not apply, shall be brought as appropriate, in any of the following forums: any court of the State of California, any federal court of the United States of America located in the State of California or, where

subject to its primary or exclusive jurisdiction, before the Federal Energy Regulatory Commission.

- 11.5 **Consistency with Federal Laws and Regulations.** This Agreement shall incorporate by reference Section 20.8 of the ISO Tariff as if the references to the ISO Tariff were referring to this Agreement.
- 11.6 **Merger.** This Agreement, including Appendix A, constitutes the complete and final agreement of the Parties with respect to the subject matter here to and supersedes all prior agreements, whether written or oral, with respect to such subject matter.
- 11.7 **Severability.** If any term, covenant, or condition of this Agreement or the application or effect of any such term, covenant, or condition is held invalid as to any person, entity, or circumstance, or is determined to be unjust, unreasonable, unlawful, imprudent, or otherwise not in the public interest by any court or government agency of competent jurisdiction, then such term, covenant, or condition shall remain in force and effect to the maximum extent permitted by law, and all other terms, covenants, and conditions of this Agreement and their application shall not be affected thereby, but shall remain in force and effect and the parties shall be relieved of their obligations only to the extent necessary to eliminate such regulatory or other determination unless a court or governmental agency of competent jurisdiction holds that such provisions are not separable from all other provisions of this Agreement.
- 11.8 **Amendments.** This Agreement and the Schedules attached here to may be amended from time to time by the mutual agreement of the Parties in writing. Amendments that are subject to FERC approval shall not take effect until FERC has accepted such amendments for filing and has made them effective.
- 10.9 **Counterparts.** This Agreement may be executed in one or more counterparts at different times, each of which shall be regarded as an original and all of which, taken together, shall constitute one and the same Agreement.

IN WITNESS WHEREOF, the Parties here to have caused this Agreement to be duly executed on behalf of each by and through their authorized representatives as of the date hereinabove written.

California Independent System Operator Corporation

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

[Full legal name of ISO Metered Entity]

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**SCHEDULE 1  
METER INFORMATION  
[Section 3.3.2]**

Resource ID Meter Number \_\_\_\_\_

Name of the Facility \_\_\_\_\_

Location (address if applicable) \_\_\_\_\_

**SCHEDULE 2**

**EXEMPTIONS FROM METERING STANDARDS AND OTHER REQUIREMENTS**  
**[Section 3.4]**

**SCHEDULE 3**

**ACCESS TO METER DATA  
AND  
AUTHORIZED USERS  
[Section 5.1]**

List authorized users and any restrictions or limitations placed on them.

[Note: authorized users will not be able to access MDAS at 1/1/8]

**SCHEDULE 4  
PART A  
ISO IMPOSED PENALTIES AND SANCTIONS  
[Section 4.1]**

**[TO BE INSERTED UPON FERC APPROVAL]**

**PART B  
CORRECTIVE MEASURES  
[SECTION 4.2]**

**[TO BE DEVELOPED]**



**SCHEDULE 5**

**NO TICE  
[Section 11.2]**

**Name of Primary Representative:** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City/State / Zip Code** \_\_\_\_\_  
**Email address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Fax:** \_\_\_\_\_

**Name of Alternative Representative:** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City/State / Zip Code** \_\_\_\_\_  
**Email address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Fax:** \_\_\_\_\_

**ISO :**

**Name of Primary  
Representative :**

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**Title :**

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**Address :**

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**City/State / Zip Code**

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**Email address :**

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**Phone :**

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**Fax:**

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**Name of Alternative  
Representative :**

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**Title :**

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**Address :**

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**City/State / Zip Code**

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**Email address :**

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**Phone :**

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**Fax:**

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## APPENDIX A

### ISO UNDERTAKING



# CALIFORNIA ISO

The ISO Metering Protocol does not yet include the Appendices which will detail the metering standards and technical standards for the certification and identification of revenue quality meters.

The Appendices will set forth the relevant technical standards and requirements, which will be drawn from the following existing documents:

- (a) the Meters standards-Specifications MTR-96, Engineering Specification for Poly-Phase Solid State Electricity Meters for use on the ISO Grid, dated January 8, 1997; and
- (b) the ISO Field Test/Audit and Certification Specifications, dated September 24, 1997

(collectively known as the "Technical Specifications").

The Technical Specifications were prepared by the Meter Sub-Team and have been available to stakeholders for a substantial period of time. Copies of the Technical Specifications are published on the ISO Home Page and may be obtained from the ISO by contracting the Meter and Data Acquisition Manager, Client Service Department.

In the present form, however, the Technical Specifications do not employ the language and definitions used in the ISO Tariff or the Metering Protocol. Accordingly, the ISO is currently redrafting the Technical Specifications, using language that conforms with that contained in the ISO Tariff and the Metering Protocol. When this redrafting is completed, the revised versions of the Technical Specifications will then become the Appendices to the ISO Metering Protocol.

The ISO will publish drafts of the Appendices as soon as they are available. Stakeholders will then be given an opportunity to comment on those draft Appendices.

However, before publication and finalization of the Appendices, the ISO wishes to finalize execution of this Meter Service Agreement.

Therefore, the ISO undertakes to the party to this Meter Service Agreement that the Appendices will, in substance and scope, contain the same technical standards and requirements as contained in the Technical Specifications. The ISO will also ensure that all interested parties are given sufficient opportunity to comment on the draft Appendices to identify any inconsistencies with the Technical Specifications before they are finalized and incorporated as attachments to the Metering Protocol.

The ISO will review comments it receives on the draft Appendices in consultation with the Meter Sub-Team that prepared the Technical Specifications.

