



California ISO

WESTERN ENERGY IMBALANCE MARKET (WEIM)

Briefing on Policy Initiatives Catalog and Roadmap

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General Session

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Goals for the Policy Catalog and Roadmap

- **Meaningfully engage external stakeholders**
 - Stakeholders propose and advocate for their own initiatives
 - Final catalog includes stakeholder prioritization
- **Transparent**
 - Clear methods to identify and prioritize proposals
 - Open and transparent access to all stakeholders to influence policy enhancements roadmap
- **Allows stakeholder prioritization to be considered in the ISO's internal planning processes, together with:**
 - Alignment with ISO strategic goals and already planned work
 - Project impact on market efficiency and system reliability
 - Implementation cost
 - Other ISO commitments
- **Incorporate urgent requests**

2024 ISO Policy Initiatives Catalog & Roadmap Process



Process requires stakeholder input:

- Proposing initiatives
- Presenting initiatives
- Consolidating and refining requests
- Prioritizing catalog

Regional Issues Forum Roundtable

- Final proposal for WEIM Governance Review – Phase 3 (EDAM)
 - Expanded role for the RIF in identifying and prioritizing discretionary policy initiatives
- ISO Policy Initiatives Catalog and Roadmap Process
 - RIF roundtable included as a step in ISO prioritization process
 - Liaisons for each sector presented sector-level input regarding themes, issues, and priorities
 - Initial synthesis of common priorities among sectors
 - Remarks on behalf of the Body of State Regulators, the WEIM Governing Body, ISO management, and public comment
- Roundtable report published on April 30th
 - https://www.westerneim.com/Documents/Regional_Issues_Forum_Policy_Roundtable_Report.pdf

Categorizing Stakeholder Submissions

Submitted ideas fall into four categories:

1. **Discretionary initiatives** – candidates for the catalog
2. **Non-discretionary initiatives** (e.g. FERC Orders)
3. **Issues being addressed** in current initiatives / working groups
4. **Process improvements:**
 - Includes suggestions related to existing processes and requests for additional transparency
 - The ISO will determine whether to further address and how to prioritize

The ISO will respond to all submissions.

Prioritization and stakeholder input

- Stakeholder prioritization survey for catalog submissions closed June 26, with results published mid-July
- Survey allowed each stakeholder to nominate:
 - One category of initiatives as top priority
 - Two individual initiatives as top priorities
 - Rank remaining initiatives as support, neutral, or oppose

- Ancillary Services
- Bidding flexibility
- Congestion revenue rights
- Demand response
- New supply technology
- Resource adequacy
- Storage
- Transmission planning
- Western energy imbalance market

Next Steps: Internal Prioritization & Roadmap Development

- **Stakeholder prioritization will be considered in the ISO's internal planning processes, together with:**
 - Alignment with ISO strategic goals and existing planning
 - Project impact on market efficiency and system reliability
 - Implementation cost
 - Other ISO commitments
- **Draft policy roadmap published in September**
- **Final policy roadmap published in December**
 - presented to WEIM Governing Body and ISO Board of Governors