

## ATTACHMENT K

### Transmission Planning Process

#### I. Introduction

SCE&G has a history of cooperative and coordinated planning with our customers for services provided to those customers. SCE&G also has a history of transmission reliability planning with neighboring utilities. These activities are discussed in detail below.

SCE&G annually prepares a transmission expansion plan for its own area, which is developed through an open and nondiscriminatory process, to meet the needs of all customers (native load, Network Service, Long-term Point-to-Point Service and Generator Interconnection Service). These local planning activities are then coupled with the coordinated assessments processes of all transmission providers of interconnected "systems" by sharing transmission expansion plans to determine if they are simultaneously feasible and to ensure that consistent assumptions and data are used in identifying "system" enhancements required to meet reliability standards.

To introduce additional transparency and the opportunity for more input into the transmission planning process in accordance with Order 890's nine principles, SCE&G has expanded its process in order to promote a more open, transparent and coordinated approach to transmission planning in South Carolina on a local level and on a regional level. A key addition to the planning process is the development with The South Carolina Public Service Authority (Santee Cooper) of the South Carolina Regional Transmission Planning (SCRTP) process, the creation of the South Carolina Regional Stakeholder Group (SCSG), and the establishment of a dedicated website for this process. This group, described more fully below, was developed in order to promote openness, transparency,

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comparability and the exchange of information consistent with the principles expressed in Order No. 890, thereby reducing the potential for and the false

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perception of undue discrimination in the planning process. An additional key feature is SCE&G's commitment to the Southeast Inter-Regional Participation Process. The elements of SCE&G's current planning process, plus the new features, described more fully below, address the nine planning principles that the Commission has articulated in Order No. 890.

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## II. Background

### A. Introduction: Local Transmission Planning

Transmission planning appropriately begins at the individual transmission "system" ("system") level. At the "system" level, the SCE&G transmission planning process provides a reliable, timely and economical transmission expansion plan that on a nondiscriminatory basis (1) meets SCE&G's obligation to serve native load, including native load growth, (2) provides the future transmission requirements of grandfathered wholesale agreements, (3) provides firm point-to-point transmission service, (4) provides network integration transmission service and (5) provides generator interconnection service.

Planning analyses and interpretations are performed by SCE&G using its own data and evaluation criteria that address NERC Transmission Planning (TPL) Reliability Standards (see [www.nerc.com](http://www.nerc.com)) and the South Carolina Electric & Gas Company Transmission Planning Criteria (see "South Carolina Electric & Gas Company Transmission Planning Criteria," SCE&G OATT Original Sheet No. ~~192~~202).

### B. Local Planning

The SCE&G Transmission Planning Process develops a transmission expansion plan which provides for timely modifications and additions to the SCE&G transmission "system" to ensure reliable and economical transmission of electric power for our customers. Goals of the SCE&G Transmission Planning Process include developing a plan and facilities to:

1. Transmit electric power from SCE&G generators to SCE&G native load and grandfathered wholesale customers
2. Transmit electric power from off-system purchases to SCE&G native load and grandfathered wholesale customers

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3. Provide Transmission Service to Point-to-Point (PTP) and Network Customers
4. Provide Interconnection Service to all generators
5. Maintain synchronism with the Eastern Interconnection

The SCE&G Transmission Planning Process develops a ten (10) year expansion plan for the SCE&G transmission "system" considering the current performance and capabilities of the transmission "system" and the required future performance and capabilities of the transmission "system." The SCE&G Transmission Planning Process ensures that the SCE&G transmission "system" is compliant with NERC Reliability Standards and SCE&G's Transmission Planning Criteria. SCE&G also seeks to evaluate and plan additions/facilities, for customers, economically, with overall cost savings in mind.

SCE&G's transmission expansion plan is based on the following drivers:

1. Reliability Standards and Planning Criteria testing
2. Native load distribution needs
3. Native load Industrial Customer needs
4. Firm PTP Transmission Service needs
5. Network/Wholesale Customer needs
6. Generator Interconnection needs
7. Actual "system" performance

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Any one or a combination of these drivers may require expansion of the SCE&G transmission "system."

1. **Reliability Standards and Planning Criteria**

SCE&G plans its transmission "system" to be compliant with the NERC Reliability Standards and to the South Carolina Electric & Gas Company Transmission Planning Criteria (*see* "South Carolina Electric & Gas Company Transmission Planning Criteria," SCE&G OATT Original Sheet No. ~~192~~[202](#)). These criteria dictate that the transmission "system" must be designed such that during any of the specified contingencies,<sup>1</sup> only short-time overloads, low voltages, and local loss of load will occur; and after appropriate switching and re-dispatching, all non-radial loads can again be served with reasonable voltages, and all facilities can again operate within acceptable limits.

2. **Types of Planning Studies Conducted**

The SCE&G Transmission Planning Process utilizes power flow, transient stability, power transfer ~~and~~, short circuit studies [and cost/benefit analyses](#) to determine when and how transmission expansion will occur. Power flow and transient studies are performed annually in compliance with NERC Planning Standards for both 1-5 year and 6-10 year planning horizons. In addition to the NERC Reliability Standard requirements, SCE&G also performs transmission planning to meet SCE&G Transmission Planning Criteria. As discussed below, Stakeholders will be provided opportunities via the Stakeholder meetings and the SCRTP website to understand and provide input, comments and questions regarding this study process, the conduct of the studies, and the output of the studies, prior to formulation of a plan.

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<sup>1</sup> Specified in the NERC Standards and SCE&G Criteria.

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Prior to initiating its annual studies, SCE&G will hold a Stakeholder meeting (discussed more fully below in section III to allow Stakeholders to provide input in the study process. SCE&G will review with Stakeholders key assumptions and modeling data used in the Reliability Transmission Planning process. SCE&G will also receive load forecasts from Network Customers and potential future

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needs from Point-to-Point Customers. This provides additional transparency and also promotes the exchange of information.

The process differs for power flow, transient stability, and short circuit "base simulation case" development and is described in each section below.

a. Power Flow Modeling Data

SCE&G's aggregated load data is used to create dispersed "system" load models for the upcoming 10 years. Additional load information is obtained with input from customers. Other modeling components include generators, transmission lines, transformers, firm power transfers, capacitors, reactors, power circuit breakers, and FACTS devices. Power flow "base cases" are then developed by Transmission Owners within SERC through the SERC region Long Term Study Group (LTSG). The LTSG then provides its cases to the Eastern Interconnection Reliability Assessment Group (ERAG) Multi-regional Modeling Group (MMWG) for inclusion in the development of its cases.

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b. Transient Stability Modeling Data

Transient stability "base cases" are developed by Transmission Owners within SERC through the SERC region Dynamics Study Group (DSG). These cases are then provided to the ERAG MMWG for inclusion in the development of its cases.

c. Short Circuit Modeling Data

Short circuit data is exchange by the Transmission Owners within through the SERC region Short Circuit Database Working Group (SCDWG).

d. Cost/Benefit Analyses

One of SCE&G's transmission planning objectives is to develop a plan that minimizes the long-term cost of expansion while maintaining expected levels of service and compliance with applicable standards. To accomplish this, SCE&G will treat all resources on a comparable basis and will give consideration that is technologically neutral to every viable alternative solution to identified transmission needs. These alternative solutions may include new transmission facilities, modifications to existing transmission facilities, generation siting or load-management opportunities. The SCE&G planning process will consider these alternative options in determining if and when transmission expansion is needed.

Transmission planning studies also are performed for OATT PTP and Network Transmission Service Requests (TSR). TSR studies are performed in accordance with the SCE&G OATT. Transmission planning studies are performed for Generator Interconnection Requests (GIR). GIR studies are performed in accordance with

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FERC 18 CFR Part 35, "Standardization of Generator Interconnection Agreements and Procedures" issued July 24, 2003.

Transmission assessment studies are jointly conducted with neighboring transmission owners through the regional transmission assessment processes. These studies include near-term and long-term transmission assessment studies. Joint studies with neighboring transmission owners are performed on an annual cycle and as needed. The exchange of data and simulation cases for all studies is done in accordance with the "SERC Data Release Guidelines". Information regarding these studies will be communicated to Stakeholders via the website and/or during a Stakeholder meeting. *See* section III below.

### **C. Regional and Sub-regional Participation**

Layered on top of SCE&G's local transmission planning process is the coordinated reliability assessments conducted by SCE&G in conjunction with other Transmission Owners in the southeast. The purpose of these assessments is to further augment the reliability of each utility's bulk power "system" through coordination of the plans of neighboring bulk power "systems." SCE&G participates fully in these processes.

SCE&G utilizes an approach coupling local planning activities with (a) information sharing, (b) coordinated assessments and (c) joint planning efforts. Appendix K-1 to this Attachment K provides a diagram of the planning process.

#### Facilitation of Local Planning (Information Sharing)

Facilitation of Local Planning is an extension of local transmission planning wherein two or more individual "systems" cooperate by exchanging information about their existing facilities and future plans so that each "system" or group, acting on its own, can individually assess the simultaneous feasibility of plans and

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performance. Normally, "system" facility data and computer power flow models are included in the information exchange. Any individual system plans developed as a result of the facilitation of Local Planning is the individual "systems" responsibility for implementation. The results of the Facilitation of Local Planning may lead to Joint Planning efforts among two or more "systems," as described below.

To ensure the Facilitation of Local Planning is effective, "systems" share through these modeling efforts their best currently available estimates of future "system" conditions and plans. The sharing of this information for future years is intended to provide ample time for other affected "systems" to react, through their local planning processes, to changes in the plans of neighboring "systems" that may have significant impacts.

SCE&G participates in the Facilitation of Local Planning through annual joint modeling efforts with neighboring "systems." In addition, more frequent exchange of information occurs, when appropriate, such as during coordinated assessment activities.

### ***1. Coordinated Assessment***

Coordinated Assessment is a process in which two or more individual "systems" agree to exchange necessary data and "system" plans and collectively monitor and assess conformance to a specific set of criteria and guides, such as the national and utility reliability standards associated with planning. This process inherently recognizes the potential effects of each "system's" plans on the other interconnected "systems" in matters of efficiency and reliability. Results of such assessments are taken into consideration during local planning processes of the participating "systems" where specific plans addressing any identified "system" deficiencies are developed.

~~Coordinated Assessment may lead to~~ This process ensures that

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interconnected systems share system plans and that analyses of these plans are conducted to assess if these plans are simultaneously feasible and otherwise use consistent assumptions and data. When these coordinated assessments determine that system plans are not simultaneously feasible, Joint Planning efforts among two or more "systems," as described below, or additional Local Planning efforts are required.

Coordinated Assessments are conducted in several different arenas. SCE&G coordinates model development and conducts assessments of the planned systems in Virginia and the Carolinas, within the Southeast and outside the Southeast, within the Eastern Interconnection.

## 2. **Joint Planning**

Joint Planning is a process in which two or more "systems" plan as if they were a single "system" but do not relinquish their responsibility for planning their individual "systems." This is usually done to address a specific concern of the interconnected "system" or to investigate possible mutually beneficial solutions to a given set of local issues. The "systems" agree to perform studies and plan "system" additions based on agreed upon criteria, guides, and performance goals. Virtually all "system" data and plans are exchanged except for proprietary business data. The "systems" agree on how the resulting joint plan will be accepted, rejected or approved. The "systems" usually join together to implement the approved plan through a contractual mechanism that delineates the responsibilities of each "system."

For SCE&G, Joint Planning typically takes place with a neighboring "system" where detailed assessments are conducted and negotiations under ~~multi party Reliability~~Interchange Agreements are used to agree on, commit to and implement detailed plans. These

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agreements are longstanding agreements that require SCE&G and each of its neighboring transmission owners to conduct coordinated assessments and to conduct local planning or joint planning to address and resolve any and all issues discovered as a result of Coordinated Assessments. SCE&G has Interchange Agreements with Santee Cooper, Duke Energy, Progress Energy Carolinas and Southern Company.

#### **D.** ~~3.~~ **The Transmission Planning Cycle**

The ~~following~~SCE&G transmission planning process is ongoing and perpetual. Proposed transmission plans are reviewed continuously as assessment and planning studies are conducted for numerous purposes. Any new input or adjustments to the study process or study results are reflected in all future studies.

The appended timeline illustrates how the SCE&G planning processes described above ~~takes~~take place over the course of a calendar year, including timelines and milestones for the coordination of models by SERC. The timeline is attached as Appendix K-2, "SCE&G Transmission Planning Process."

#### **E.** **Transmission Plan Approval**

After the modeling and assessment process is conducted, a transmission expansion plan is produced that reflects consideration of alternatives to transmission expansion as submitted by stakeholders or anyone else. SCE&G senior management approves the selected solution and if transmission expansion is the selected solution, the expansion project is included in the SCE&G transmission expansion plan, in accordance with FERC Orders and state regulation.

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### **III. South Carolina Regional Transmission Planning Stakeholder Group**

#### **A. Introduction**

SCE&G enhanced its current planning processes (described above) in accordance with Order No. 890 by establishing with Santee Cooper a stakeholder process known as SCRTP to provide for the exchange of information and open communication enabling public input through its SCSG members consistent with the expectations for open, transparent, comparable and coordinated regional planning as articulated by the FERC in Order No. 890. SCE&G and Santee Cooper are establishing a dedicated website ("regional website") ([www.scrtp.com](http://www.scrtp.com)) for the SCRTP process. A link to this website will be available via SCE&G and Santee Cooper's OASIS. This website will be utilized to provide information regarding SCE&G's planning process.

Through the SCSG, Santee Cooper and SCE&G each year will host quarterly meetings which are open to Stakeholders to provide a forum for open and transparent transmission planning for SCE&G's local and regional planning processes on a nondiscriminatory basis. Any individual or entity may attend these quarterly meetings, be participative in the process, and may consider joining the SCSG. Through the SCSG, all participants will have input and participation in the Reliability Transmission Planning (RTP) processes (the RTP process is discussed above in Section II) and the Economic Transmission Planning (ETP) processes. The stakeholder meeting process will allow for the exchange of information and input into the process on a comparable basis and thereby eliminate the potential for undue discrimination.

The ETP process will determine the facilities or "system" changes on the SCE&G transmission "system" to address congestion and/or increase transfer capability on any direct interface. The final results of this process will include cost and time estimates associated with implementing the

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facilities or "system" changes. The intent of the ETP process is to provide information to stakeholders and is not a commitment to build. SCE&G will also conduct Economic Transmission Planning and participate in the "Southeast Inter-Regional Participation Process," which is attached to this document as Appendix K-3. This process will be conducted concurrently with all other planning described herein.

By providing open information sharing through these regular meetings, and by treating all customers comparably in the RTP and ETP processes, SCE&G ensures that these planning processes satisfy the comparability principle.

Publicly available information disclosed at these meetings will also be made available on the website. Information which is CEII will only be made available on the website to Stakeholders who meet SCE&G's eligibility requirements. These requirements are posted on SCE&G's EBB in its Rules, Standards, and Practices. These requirements maybe updated and/or revised pursuant to SCE&G's posted process for updating its Rules, Standards, and Practices. SCE&G classifies information as CEII based upon the FERC's most current definition of CEII.

To promote transparency and enable Stakeholders to replicate the result of the Transmission Provider's planning studies and thereby reduce the incidence of after-the-fact disputes regarding whether transmission planning has been conducted in an unduly discriminatory fashion, SCE&G will make available, during the relevant Stakeholder meetings and/or the regional website, information concerning the basic methodology, criteria, and process the Transmission Provider uses to develop its plan. Information will be placed on the website, with some information being placed under the restricted access section and available to those Stakeholders who are eligible to receive CEII information.

Participants in the SCRTP process will be responsible for their own costs of participation.

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## **B. Stakeholder Group**

At its first Fall Stakeholder meeting on December 10, 2007, SCE&G and Santee Cooper will request that Stakeholders organize their group and will provide a forum to facilitate the organization of the group. SCE&G contemplates that stakeholder membership in the SCSG will be divided into 8 sectors, as follow:

- Transmission Owners/Operators
- Transmission Service Customers
- Cooperatives
- Municipals
- Marketers
- Generation Owners/Developers
- ISO/RTO
- State Regulatory Representatives (non-voting)

The Transmission Provider's initial role in the SCSG will be to host and conduct the meetings described above.

Key features of the stakeholder group are as follows:

- SCSG participants determine their sector affiliation; participants must provide information to validate their sector affiliation.

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- Each sector within the SCSG will have two voting members (14 total voting members)
- One vote per member; majority rule
- Voting members will be determined by the sector membership annually during the Fall Meeting.
- Each Company will have only one voting member in the SCSG
- This promotes an environment where all interested parties can actively participate in the SCSG
- SCSG meetings are open to non-SCSG members
- SCSG Stakeholders will identify and request economic power transfer sensitivities to be studied; If more than 5 economic power transfer sensitivities are requested, Stakeholders will vote to select priorities.<sup>2</sup>
- SCSG can vote to change the number and timing of meetings with agreement by SCE&G, but changes must support the model development process and planning cycle.

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<sup>2</sup> For each approved request, the affected Transmission Providers will conduct the studies in the ETP process (e.g., if the requested economic transfer is between SCE&G and Santee, then SCE&G and Santee will conduct the studies as outlined in the regional planning process. If the request is between SCE&G and Duke, then SCE&G and Duke will conduct the study). SCE&G will coordinate with inter-regional stakeholders regarding Economic Planning Studies that are inter-regional in nature.

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### **C. Stakeholder Meetings**

SCE&G and Santee Cooper will arrange and host the SCSG meetings at locations within their service territories. These meetings will serve as the vehicle to allow for the exchange of information between SCE&G and its Stakeholders. Notification of and a schedule of these meetings will be posted on the regional website and an open email distribution list will be maintained by SCE&G and Santee Cooper and will be used to email notices of meetings and other planning-related communications. The number of meetings per year and the meeting schedule, discussed above, are subject to change by decision of the stakeholder group and SCE&G over time. Any revision to this schedule must support existing planning activities in model development and "system" analyses.

The schedule for the stakeholder meetings track the planning process timeline to allow SCE&G to communicate information to its Stakeholders at each stage of the planning process and allow Stakeholders to participate not only by the exchange of information but also allowing for Stakeholder input at the relevant periods of the planning process. This will allow stakeholder input at the beginning stage when the prior year's plan is reviewed and new issues are identified to be modeled and studied as the planning cycle starts over. Stakeholders are then updated at various times during the year regarding the studies and they are afforded the opportunity to ask questions about the studies, offer input and request additional studies. Based on the planning timeline SCE&G and Santee Cooper developed an outline of the substance of these four sessions, and the work associated with their conduct. The following is an outline and brief description of the information that will be communicated and shared during the Stakeholder meetings.

#### Fall Stakeholder Meeting

- The Fall Stakeholder meeting is scheduled to occur prior to initiation of SCE&G's annual reliability transmission

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planning (RTP) studies examining "system" performance against requirements included in NERC and standards and criteria. This will allow opportunity for stakeholder input into the study processes and sharing and reviewing of planning – related data and analyses before studies are actually conducted and will ensure that up-to-date information is modeled and included in the reliability study processes.

- SCE&G will review and have discussion with stakeholders the key assumptions and data used for internal model development in the RTP process.
- Stakeholders will provide input on key assumptions and modeling data used in the RTP process, including but not limited to: (a) Network Customers' Network Load Forecasts, in the form of a 10-year summer and a 10-year winter load forecast starting with the next summer period, and Network Resources Forecasts, in the form of identified resources for the next 10 years; and (b) Point-to-Point ~~customers' forecasts~~ Customers' forecasts, in the form of identified customer expectations over the next 10 years. Stakeholders will also provide any updates to the information submitted in the customer's application for service. This information shall be provided by October 31 of each year and may be submitted by email or in hardcopy form to SCE&G Transmission. Information received will be subject to protection for confidentiality. SCE&G will review the procedures by which transmission customers submit required data.
- A schedule for completion of RTP studies is established.

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- SCE&G will review its transmission expansion plan and the status of upgrades identified in its transmission expansion plan
- Stakeholders have the opportunity to discuss and provide comments on the latest transmission plans and upgrades in order to provide feedback for the development of the next plan.

#### Winter Stakeholder Meeting

- ~~SCE&G will review the results of:~~
- ~~its RTP studies~~ the initial study results (for stakeholder input) and final study results (including stakeholder input) of its RTP studies, which include studies conducted to measure the performance of the SCE&G transmission system against the applicable NERC Reliability Standards and the SCE&G Internal Transmission Planning Criteria. This review may occur by web conference or conference call, if needed, to maintain study schedules. Stakeholders will have the opportunity to provide comments and feedback on these results as discussed in Section D “The Transmission Planning Cycle” any and all comments and feedback will be considered in the ongoing and perpetual planning process;
- ~~completed and published~~ two-party and multi-party RTP studies conducted with interconnected and other Eastern Interconnection transmission owners, which include studies conducted with other transmission owners. This review may occur by web conference or conference call, if needed, to maintain study schedules.

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Stakeholders will have the opportunity to provide comments and feedback on these results as discussed in Section D “The Transmission Planning Cycle” any and all comments and feedback will be considered in the ongoing and perpetual planning process;

- the most recent ~~VACAR, SERC-region~~regional and ~~ERAG~~interregional reliability assessment studies. This review may occur by web conference or conference call, if needed, to maintain study schedules;
- any upgrades being considered. Stakeholders can discuss possible alternatives to the proposed upgrades. These alternatives may be in the form of other transmission expansion solutions, generation solutions, load-management solutions, etc. As discussed in Section D “The Transmission Planning Cycle”, viable alternative solutions to proposed upgrades will be considered in the ongoing and perpetual planning process.
- ~~SCE&G will review~~ information on how to acquire all data used to conduct the studies, such as, base cases, reports and criteria. All data released will be subject to Non-disclosure and Confidentiality agreements.

#### Spring Stakeholder Meeting

- Stakeholders will identify and request economic power transfer sensitivities to be studied;
- All requested sensitivities will be considered except sensitivities that specify specific generation resources;

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- Up to 5 sensitivities will be studied per year. If more than 5 are requested, Stakeholders will vote to select priorities.<sup>3</sup> Sensitivities that are not selected by the stakeholder group as one of the 5 studied sensitivities will be studied only if the requestor(s) pays for the additional study efforts.
- Stakeholders will consider clustering similar Economic Transmission Planning Study requests. In this regard, if two or more of the Economic Transmission Planning Study requests are similar in nature and SCE&G concludes that clustering of such requests and studies is appropriate, SCE&G may, following communications with the Stakeholders, cluster those studies for purposes of the Economic Transmission Planning Study and Report.
- Requested economic power ~~transfer sensitivities with sources or sinks outside the SCE&G service territory will be advanced to either a regional process or to the "Inter-Regional Participation Process" (attached at~~ transfers with the source(s) and the sink(s) within the SCE&G transmission system will be studied by SCE&G. Requested transfers with the source(s) and the sink(s) within the SCRTP area will be jointly studied by SCE&G and Santee Cooper. Requested studies with the source(s) and/or the sink(s) outside the SCRTP area that are studied by SCE&G and Santee Cooper will include only the results for the SCRTP area and not include results for other areas. If the Stakeholders want the results from other areas included, the request will be advanced to the SIRPP (see Appendix K-3).

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<sup>3</sup> For each approved request, the affected Transmission Providers will conduct the studies in the ETP process (e.g., if the requested economic transfer is between SCE&G and Santee, then SCE&G and Santee will conduct the studies as outlined in the regional planning process. If the request is between SCE&G and Duke, then SCE&G and Duke will conduct the study).

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- SCE&G will review with SCSG and meeting attendees the assumptions for Regional Model development.

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- Stakeholders will provide additional input on assumptions for Regional Model development.

#### Summer Stakeholder Meeting

- SCE&G will review, discuss and receive input from the SCSG on results of requested economic power transfer sensitivities conducted by SCE&G individually, Regionally with Santee Cooper or pursuant to the Interregional Participation Process, including:
  - Impacted facilities
  - Solution options
  - Cost and time estimates
- SCE&G will review and explain to the SCSG and meeting attendees information on how to acquire all data and study assumptions used to conduct the power transfer sensitivity studies. All data released will be subject to Non-disclosure and Confidentiality agreements.

#### **D. Access to Data and Studies**

SCE&G will utilize the CEII [application and non-disclosure agreement](#) posted ~~in its Rules, Standards and Practices on OASIS to address CEII concerns. Additionally, the Rules, Standards and Practices describe how parties shall request and obtain CEII on the SCRTP website.~~

[SCE&G will follow the procedures described in Appendix K-3 for CEII data and information and for non-CEII confidential information.](#)

SCE&G will provide base case, reports and criteria for transmission planning to allow Stakeholders and third parties to replicate the results of

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planning studies and thereby reduce the potential incidence of after-the-fact disputes regarding whether planning has been conducted in an unduly discriminatory fashion.

## **E. Dispute Resolution**

Disputes that arise from procedural or substantive issues as related to Order No. 890 will be resolved in the following manner:

1. Resolution Procedures. Disputes shall be referred to a senior representative of SCE&G and to a senior representative(s) of the individual stakeholder(s) bringing the dispute for resolution on an informal basis as promptly as practicable. In the event the designated representatives are unable to resolve the dispute by mutual agreement within ninety (90) days from the date of receiving written notice of such dispute (or such other period as the disputing parties may agree upon), such dispute then may be submitted to nonbinding arbitration and resolved in accordance with the arbitration procedures set forth below.

~~2.~~—Arbitration Procedures. Any dispute submitted to arbitration as described above shall be processed in accordance with the Uniform Arbitration Act and, to the extent not inconsistent therewith, the Commercial Arbitration Rules of the American Arbitration Association ("AAA"), as amended and in effect on the date that demand for arbitration is filed with the AAA. The arbitration shall be conducted by a single arbitrator. Each party to the arbitration shall select an arbitrator candidate. The AAA shall then select an arbitrator from such candidates according to its reasonable judgment. The arbitrator shall issue a decision no later than ninety (90) days from the date a party to the arbitration receives written notice that a dispute was not resolved by mutual agreement, and therefore, must be submitted to arbitration. The expenses of the arbitration shall be borne equally by the parties to the arbitration,

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provided that each party shall pay for and bear the cost of its own experts, evidence and legal counsel.

Notwithstanding anything to the contrary in this Section III. E., any affected party may refer the matter to the Federal Energy Regulatory Commission at any time, for example, by filing with the Commission a complaint under Section 206 of the Federal Power Act, a request for declaratory order, or a change in rate under Section 205 of the Federal Power Act.

## **F. Cost Allocation for New Projects<sup>4</sup>**

### **1. General**

The following provides the Transmission Provider's methodology for allocating the actual costs of new transmission facilities that do not fit under the general Tariff rate structure. In particular, this methodology addresses the allocation of the actual costs of economic transmission upgrades that are identified in the Economic Planning Studies and that are not otherwise associated with transmission service provided under the Tariff and are not associated with the provision of transmission service under other arrangements, such as the Transmission Provider's provision of bundled service to its Native Load Customers. Transmission Service on the Transmission Provider's transmission system must be applied for consistent with the requirements and procedures as stated in the Transmission Provider's Tariff.

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<sup>4</sup> SCE&G shall retain decision making authority for such decisions related to reliability planning consistent with its statutory responsibilities for reliability. The process described in this Attachment K is not intended to replace or diminish the obligations of SCE&G pursuant to its respective open access transmission tariff to, as applicable, provide transmission service to, or undertake construction of transmission expansion projects for, any transmission customer. Transmission expansion options will remain fully subject to the current reservation and request processes conducted through the OASIS, and

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## 2. Cost Allocation Methodology for Economic Upgrades:

- a. **Identification of Economic Upgrades:** The transmission expansion plans will identify the transmission upgrades that are necessary to ensure the reliability of the Transmission System and to otherwise meet the needs of long-term firm transmission service commitments ("Reliability Upgrades"). All of the upgrades identified in the Economic Planning Studies that are not identified in the transmission expansion plans, and are thus not such Reliability Upgrades, shall constitute "Economic Upgrades."
- b. **Request for Performance of Economic Upgrades:** Within thirty (30) calendar days of the posting of the final results of the underlying Economic Planning Study[ies], one or more entities ["Initial Requestor[s]"] that would like the Transmission Provider to construct one or more Economic Upgrades identified in the Economic Planning Study[ies] may post a request for the Transmission Provider to construct such Economic Upgrade[s] on the secured area of the Regional Planning Website, along with an identification of the amount of megawatts of transmission capacity for which the Initial Requestor[s] would like to take cost responsibility. The request must consist of a completed request application, the form of which will be posted on the Regional Planning Website ("Economic Upgrade Application"). Other entities ("Subsequent Requestor[s]") that also would like the Transmission Provider to construct the Economic Upgrade[s] sought by the Initial Requestor[s] may also notify the Transmission Provider of its intent by posting such intent, along with the amount of megawatts of transmission capacity that it would like to take cost responsibility, on the Regional

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the processes discussed here do not replace such OASIS processes for SCE&G.

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Planning Website within thirty (30) calendar days of the Initial Requestor's posting of its Economic Upgrade Application on the Regional Planning Website (collectively, the Initial Requestor[s] and the Subsequent Requestor[s] shall be referred to as the "Requestor[s]").

- c. **Allocation of the Costs of the Economic Upgrades:** The actual costs of the Economic Upgrades shall be allocated to each Requestor based upon the amount of megawatts of transmission capacity that it requested responsibility for in its respective request posted on the Regional Planning Website. Should the total amount of transmission capacity identified by the Requestors not equal the amount of transmission capacity that is estimated to be added to the Transmission System by constructing the Economic Upgrade, then the Requestor[s]' cost responsibility will be adjusted on a pro rata basis based upon the amount of capacity identified by the Requestor[s]' relative to the total transmission capacity estimated to be added by the Economic Upgrade[s] so that all of the cost responsibility for the Economic Upgrade[s] is allocated to the Requestor[s]. If one or more of the Requestors do not identify the amount of megawatts for which it is willing to take cost responsibility, then the Requestors shall bear the actual costs of the Economic Upgrade[s] in equal shares based upon the number of Requestors. The Requestor[s] shall bear cost responsibility for the actual costs of the Economic Upgrades. Should a Requestor later not enter into an agreement with the Transmission Provider for the construction of the Economic Upgrade[s], then the remaining Requestor[s] cost responsibility will be recalculated on a pro rata basis based upon the amount of megawatts requested.
- d. **Cost Allocation for the Acceleration, Expansion, Deferral, or Cancellation of Reliability Upgrades:** Should the

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Transmission Provider conclude that the construction of an Economic Upgrade[s] would accelerate the construction of, or require the construction of a more expansive, Reliability Upgrade, then the Requestor[s] shall bear the costs of such acceleration or expansion. Should the Transmission Provider conclude that the construction of the Economic Upgrade would result in the deferral or cancellation of a Reliability Upgrade, then the actual costs of the Economic Upgrade[s] allocated to the Requestors shall be reduced by the amount of savings caused by the deferral or cancellation.

- e. **Implementing Agreements and Regulatory Approvals:** The Transmission Provider will not be obligated to commence design or construction of any Economic Upgrades until (i) a binding agreement[s] with all of the Requestor[s] for such construction by the Transmission Provider and payment by the Requestor[s] of its allocated cost responsibility (in accordance with Section 8.2.3 above) is executed by the Parties and (ii) all of the Requestor[s] provide the Transmission Provider security, in a form acceptable to the Transmission Provider, for the full costs of the design and construction. Furthermore, the Transmission Provider shall not be obligated to commence construction, or to continue construction, if all necessary regulatory approvals are not obtained, with the Transmission Provider having to make a good faith effort to obtain all such approvals. The actual costs associated with obtaining such regulatory approvals shall be included in the total costs of the Economic Upgrades and shall otherwise be borne by the Requestors.

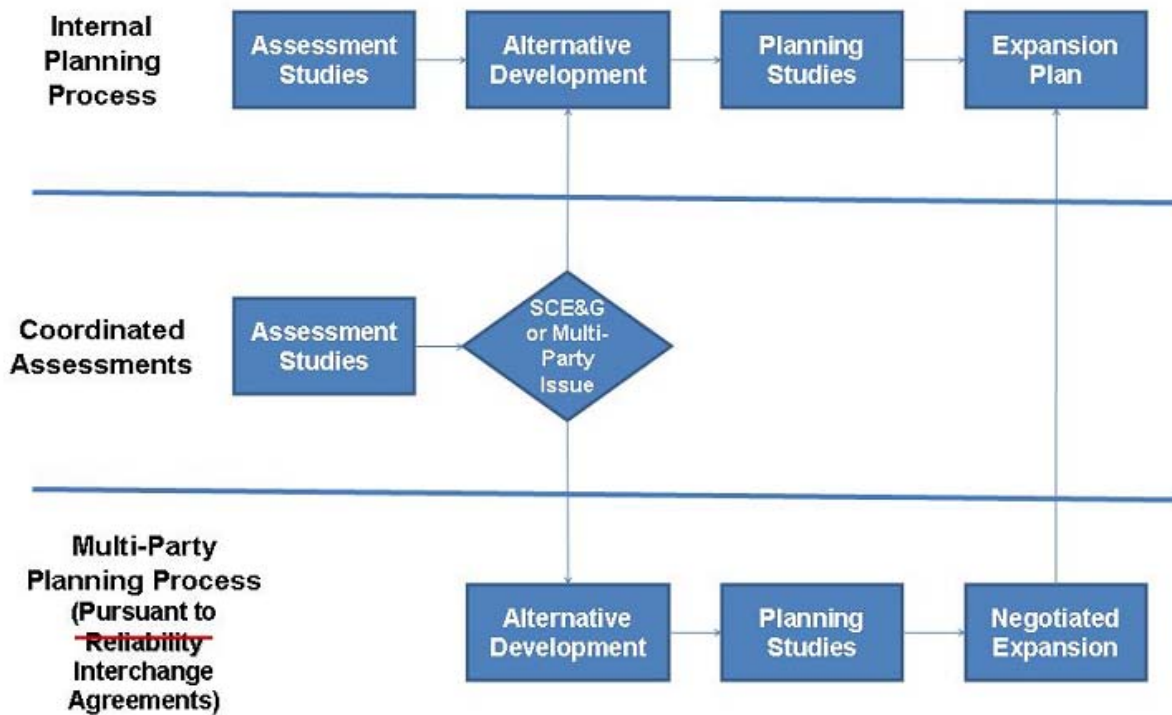
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## SCE&G Transmission Planning Process Appendix K-1



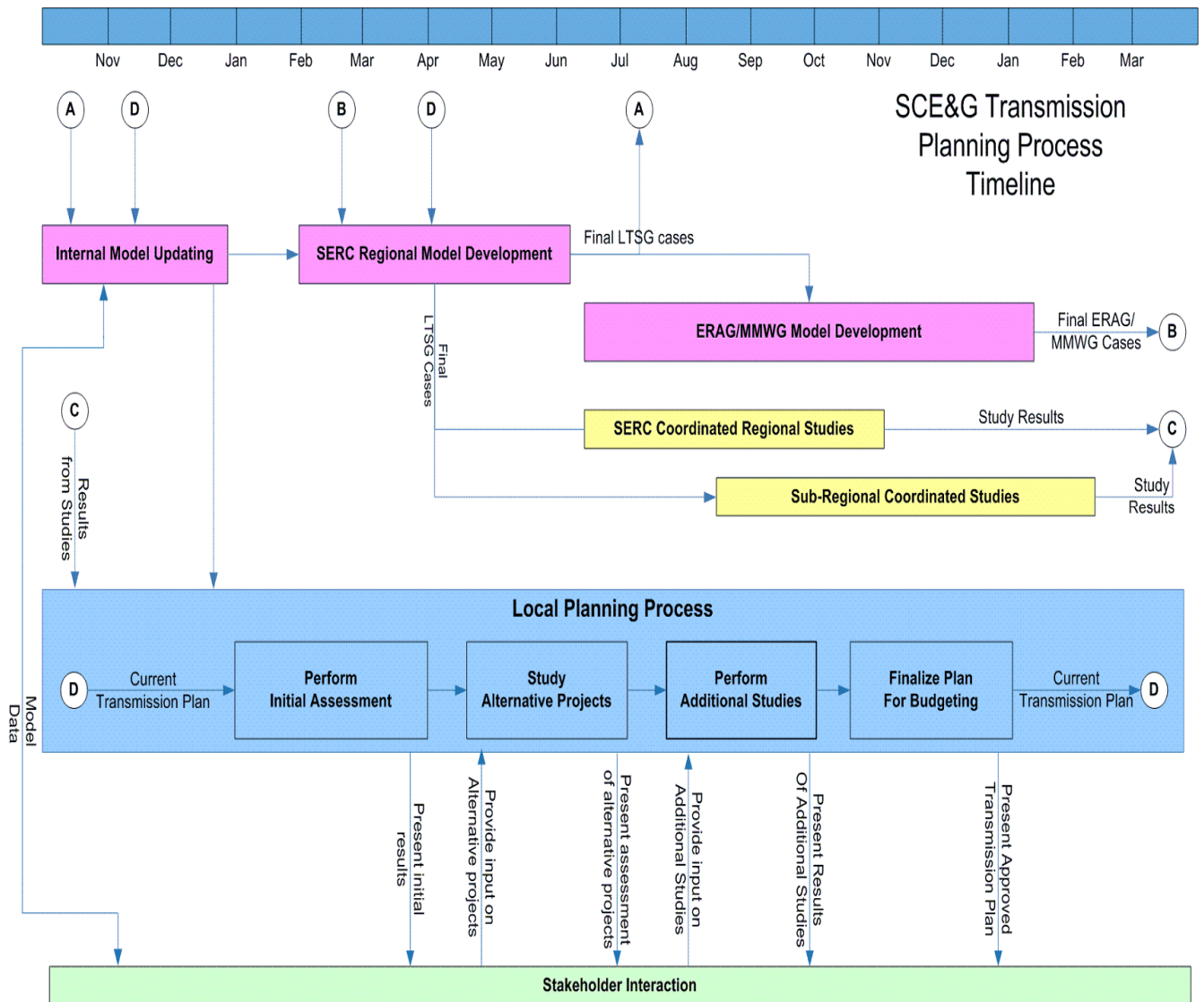
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**Appendix K-2**



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## Appendix K-3

### Southeast Inter-Regional Participation Process

#### Introduction:

In an effort to more fully address the regional participation principle outlined in the Order 890 Attachment K Tariff requirements and the related guidance contained in the FERC Transmission Planning Process Staff White Paper (dated August 2, 2007), this Southeast Inter-Regional Participation Process expands upon the existing processes for regional planning in the Southeast. This document outlines an inter-regional process among various Southeastern interconnected transmission owners. The inter-regional process described herein is incorporated into each Participating Transmission Owner's<sup>51</sup> planning process and OATT Attachment K (for those transmission owners that have a regulatory requirement to file an Attachment K).

#### Purpose:

This inter-regional process complements the regional planning processes developed by the Participating Transmission Owners in the Southeast. For the purpose of this document, the term "Southeast Inter-Regional Participation Process" ("SIRPP") is defined as a new process to more fully address the regional participation principle of Order 890 for multiple transmission systems in the Southeast. The term "Regional Planning Processes" refers to the regional transmission planning processes a Transmission Owner has established within its particular region for Attachment K purposes. Importantly, the Economic Planning Studies discussed herein are hypothetical

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~~<sup>5</sup>The sponsors of the Southeast Inter-Regional Participation Process are referred to as transmission owners, rather than transmission providers, because not all of the sponsors are "Transmission Providers" for purposes of the *pro forma* OATT.~~

<sup>1</sup>The sponsors of the Southeast Inter-Regional Participation Process are referred to as transmission owners, rather than transmission providers, because not all of the sponsors are "Transmission Providers" for purposes of the *pro forma* OATT.

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South Carolina Electric & Gas Company  
or its designated agent  
FERC Electric Tariff  
Third Revised Volume No. 5

Revised Open Access Transmission Tariff  
First Revised Sheet No. 234  
Superseding Original Sheet No. 234

studies that do not affect the transmission queue for purposes of System Impact Studies,

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Facilities Studies, or interconnection studies performed under other portions of the OATT.

### **Current Inter-Regional Planning Process:**

Each Southeastern transmission owner currently develops a transmission plan to account for service to its native load and other firm transmission service commitments on its transmission system. This plan development is the responsibility of each transmission planner individually and does not directly involve the Regional Reliability Organization (*e.g.* SERC). Once developed, the Participating Transmission Owners collectively conduct inter-regional reliability transmission assessments, which include the sharing of the individual transmission system plans, providing information on the assumptions and data inputs used in the development of those plans and assessing whether the plans are simultaneously feasible.

### **Participating Transmission Owners:**

Due to the additional regional planning coordination ~~principals~~principles that have been announced in Order 890 and the associated Transmission Planning White Paper, several transmission owners have agreed to provide additional transmission planning coordination, as further described in this document. The “Participating Transmission Owners” are listed on the SIRPP website (<http://www.southeastirpp.com>).

### **Southeast Inter-Regional Participation Process:**

The Southeast Inter-Regional Participation Process is outlined in the attached diagram. As shown in that diagram, this process will provide a means for conducting stakeholder requested Economic Planning Studies across multiple interconnected systems. In addition, this process will build on the current inter-regional, reliability planning processes required by existing multi-party reliability agreements to allow for additional participation by stakeholders.

The established Regional Planning Processes outlined in the Participating Transmission

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Owners' Attachment Ks will be utilized for collecting data, coordinating planning assumptions, and addressing stakeholder requested Economic Planning Studies internal to their respective regions. The data and assumptions developed at the regional level will then be consolidated and used in the development of models for use in the Inter-Regional Participation Process. This will ensure consistency in the planning data and assumptions used in local, regional, and inter-regional planning processes.

These established Attachment K processes may also serve as a mechanism to collect requests for inter-regional Economic Planning Studies by a participant's stakeholders group. The Economic Planning Studies requested through each participant's Attachment K process that involve impacts on multiple systems between Regional Planning Processes will be consolidated and evaluated as part of the Southeast Inter-Regional Participation Process. Stakeholders will also be provided the opportunity to submit their requests for inter-regional Economic Planning Studies directly to the Inter-Regional process.

The Participating Transmission Owners recognize the importance of coordination with neighboring (external) planning processes. Therefore, seams coordination will take place at the regional level where external regional planning processes adjoin the Southeast Inter-Regional Participation Process (*e.g.* Southeastern Regional Planning Process coordinating with FRCC Regional Planning Process, Entergy coordinating with SPP, TVA coordinating with MISO and PJM, and the North Carolina Transmission Planning Collaborative coordinating with PJM). External coordination is intended to include planning assumptions from neighboring processes and the coordination of transmission enhancements and stakeholder requested Economic Planning Studies to support the development of simultaneously feasible transmission plans both internal and external to the Southeast Inter-Regional Participation Process.

With regard to the development of the stakeholder requested inter-regional Economic Planning Studies, the Participating Transmission Owners will each provide staff (transmission planners) to serve on the study coordination team. The study coordination team will lead the development of study assumptions (and coordinate with stakeholders, as discussed further below), perform model development, and perform any other coordination efforts with stakeholders and impacted external planning processes. During

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the study process, the study coordination team will also be responsible for performing analysis, developing solution options, evaluating stakeholder suggested solution options, and developing a report(s) once the study(ies) is completed. Once the study(ies) is completed, the study coordination team will distribute the report(s) to all Participating Transmission Owners and the stakeholders.

With regard to coordinating with stakeholders in the development of the inter-regional Economic Planning Study(ies), in each cycle of the Southeast Inter-Regional Participation Process, the Participating Transmission Owners will conduct three inter-regional stakeholder meetings. The information to be discussed at such meetings will be made available in final draft form for stakeholder review prior to any such meeting by posting on the SIRPP website and/or e-mails to SIRPP Stakeholder Group (“SIRPPSG”) members. The Participating Transmission Owners will use reasonable efforts to make such information available at least 10 calendar days prior to the particular meeting. The Participating Transmission Owners will conduct the “1<sup>st</sup> Inter-Regional Stakeholder Meeting”, as shown in the attached diagram. At this meeting, a review of all of the Economic Planning Study(ies) submitted through the participants’ Regional Planning Processes or directly to the Inter-Regional process, along with any additional Economic Planning Study requests that are submitted at this 1<sup>st</sup> meeting, will be conducted. During this meeting, the stakeholders will select up to five studies that will be evaluated within the planning cycle. The study coordination team will coordinate with the stakeholders regarding the study assumptions underlying the identified stakeholder requested inter-regional Economic Planning Study(ies). Through this process, stakeholders will be provided an opportunity to comment and provide input regarding those assumptions. Following that meeting, and once the study coordination team has an opportunity to perform its initial analyses of the inter-regional Economic Planning Study(ies), the Participating Transmission Owners will then conduct the “2<sup>nd</sup> Inter-Regional Stakeholder Meeting.” At this meeting, the study coordination team will review the results of such initial analysis, and stakeholders will be provided an opportunity to comment and provide input regarding that initial analysis. The study coordination team will then finalize its analysis of the inter-regional study(ies) and draft the Economic Planning Study(ies) report(s), which will be presented to the stakeholders at the “3<sup>rd</sup> Inter-Regional Stakeholder Meeting.” Stakeholders will be provided an opportunity to comment and

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provide input regarding the draft report(s). Subsequent to that meeting, the study coordination team will then finalize the report(s), which will be issued to the Participating Transmission Owners and stakeholders.

In addition to performing inter-regional Economic Planning Studies, the Southeast Inter-Regional Participation Process will also provide a means for the Participating Transmission Owners to review, at the Southeast Inter-Regional Participation Process stakeholder meetings, the regional data, assumptions, and assessments that are then being performed on an inter-regional basis.

### **Southeast Inter-Regional Participation Process Cycle:**

The Southeast Inter-Regional Participation Process will be performed annually. Due to the expected scope of the requested studies and size of the geographical region encompassed, the Participating Transmission Owners will perform up to five (5) inter-regional Economic Planning Studies annually, which could encompass both Step 1 and Step 2 evaluations. A Step 1 evaluation will consist of a high level screen of the requested transfer and will be performed during a single year's planning cycle. The high level screen will identify transfer constraints and likely transmission enhancements to resolve the identified constraints. The Participating Transmission Owners will also provide approximate costs and timelines associated with the identified transmission enhancements to facilitate the stakeholders' determination of whether they have sufficient interest to pursue a Step 2 evaluation. Once a Step 1 evaluation has been completed for a particular transfer, the stakeholders have the option to request a Step 2 evaluation for that transfer to be performed during the subsequent year's Inter-Regional Participation Process Cycle. If the stakeholders opt to not pursue Step 2 evaluation for the requested transfer during the subsequent year's Inter-Regional Participation Process Cycle, an Economic Planning Study of that request may be re-evaluated in the future by being submitted for a new Step 1 evaluation. In the event that the stakeholders request a Step 2 evaluation, the Participating Transmission Owners will then perform additional analysis, which may include additional coordination with external processes. The Participating Transmission Owners will then develop detailed cost estimates and timelines associated with the final transmission enhancements. The Step 2 evaluation will ensure that

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sufficient coordination can occur with stakeholders and among the impacted Participating Transmission Owners. In addition, the Step 2 evaluation will provide sufficient time to ensure that the inter-regional study results are meaningful and meet the needs of the stakeholders.

It is important to note that the Participating Transmission Owners expect that a Step 2 evaluation will be completed prior to interested parties requesting to sponsor transmission enhancements identified in an Economic Planning Study. However, the Participating Transmission Owners will work with stakeholders if a situation develops where interested parties attempt to sponsor projects identified in a Step 1 evaluation and there is a compelling reason (*e.g.* where time is of the essence).

### **Inter-Regional Cost Allocation:**

~~The cost allocation for Inter-Regional Economic Upgrade projects will be determined by each region in which the construction of such upgrades (in whole or in part) would occur.~~

The cost allocation for Inter-Regional Economic Upgrade projects will be determined in accordance with the cost allocation principle adopted by each Participating Transmission Owner's Regional Planning Process in which each portion of the construction of such upgrades would occur. The cost allocation principle for each SIRPP Regional Planning Process is posted on the SIRPP website. Typically, since Inter-Regional Economic Upgrade projects will likely consist of improvements that will be physically located in the footprints of multiple Regional Planning Processes, this approach means the cost allocation for each part of the Inter-Regional Economic Upgrade project or each project within a set of projects will be governed by the cost allocation principle adopted by the Regional Planning Process in which that part of the project or set is physically located. For example, should an Inter-Regional Economic Upgrade project consist of a single, 100 mile 500 kV transmission line, with 30 miles physically located in Regional Planning Process "A" and the remaining 70 miles located in Regional Planning Process "B," then the cost allocation for the 30 miles of 500 kV transmission line located in Regional Planning Process "A" would be governed by that Regional Planning Process' cost allocation principle, and the cost allocation for the other 70 miles of 500 kV transmission

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line would be governed by the cost allocation principle of Regional Planning Process “B.” Should an Inter-Regional Economic Upgrade project be physically located entirely within one Regional Transmission Planning process, the costs of the project would be governed by that region’s cost allocation principle.

**Inter-Regional Coordination of Economic Transmission Project Development:**

Once an Economic Planning Study report has been finalized, multiple stakeholders may be interested in jointly participating in the project development. An Inter-Regional process addressing each such economic upgrade request will be developed that will formalize the process of determining if there is sufficient stakeholder interest to pursue

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economic project development and the coordination that will be required of the impacted Transmission Owners to support this process. The Participating Transmission Owners and the stakeholders will support this process development activity beginning in 2008.

### **Stakeholder Participation in the Southeast Inter-Regional Participation Process:**

#### ***Purpose***

The purpose of the ~~Southeast Inter-Regional Participation Process Stakeholder Group (SIRPPSG)~~ is to provide a structure to facilitate the stakeholders' participation in the Southeast Inter-Regional Participation Process. Importantly, the SIRPPSG shall have the flexibility to change the "Meeting Procedures" section discussed below but cannot change the Purpose, Responsibilities, Membership, or Data and Information Release Protocol sections absent an appropriate filing with (and order by) FERC to amend the OATT.

#### ***Responsibilities***

In general, the SIRPPSG is responsible for working with the Participating Transmission Owners on Inter-Regional Economic Planning Study requests so as to facilitate the development of such studies that meet the goals of the stakeholders. The specific responsibilities of this group include:

1. Adherence to the intent of the FERC Standards of Conduct requirements in all discussions.
2. Develop the SIRPPSG annual work plan and activity schedule.
3. Propose and select the Economic Planning Study(ies) to be evaluated (five annually).
  - a. Step 1 evaluations
  - b. Step 2 evaluations
4. The SIRPPSG should consider clustering similar Economic Planning Study requests. In this regard, if two or more of the Economic Planning Study requests are similar in nature and the Participating Transmission Owners conclude that clustering of such requests and studies is appropriate, the Participating Transmission Owners may, following communications with the SIRPPSG, cluster

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those studies for purposes of the transmission evaluation.

5. Provide timely input on the annual Economic Planning Study(ies) scope elements, including the following:

- a. Study Assumptions, Criteria and Methodology
- b. Case Development and Technical Analysis
- c. Problem Identification, Assessment and Development of Solutions (including proposing alternative solutions for evaluation)
- d. Comparison and Selection of the Preferred Solution Options
- e. Economic Planning Study Results Report.

5.6. Providing advice and recommendations to the Participating Transmission Owners on the Southeast Inter-Regional Participation Process.

### ***Membership***

~~The SIRPPSG membership is open to any valid stakeholder in the SIRPP. For the SIRPP a valid stakeholder is defined as any Eligible Customer, generation owner/development company, state or federal agency, and any organization capable of providing Ancillary Services under one of the Participating Transmission Owners' OATTs. In addition, any Transmission Owner, Transmission Operator, or Transmission Planner as those terms or their successors are used under the NERC Functional Model, as may be amended from time to time, are eligible to be stakeholders under this SIRPP. Authorized agents of the above identified stakeholder organizations will also be permitted to represent those organizations in the SIRPP. Any individual wishing to become an SIRPPSG member can make an application for membership on the SIRPP website (<http://www.southeastirpp.com>). On the application for SIRPPSG membership, the applicant must provide their name, their organization affiliation, and an explanation of how they meet at least one of the categories listed in the above valid stakeholder definition.~~

The SIRPPSG membership is open to any interested party.

### ***Meeting Procedures***

The SIRPPSG may change the Meeting Procedures criteria provided below pursuant to the voting structure in place for the SIRPPSG at that time. The currently effective

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Meeting Procedures for the SIRPPSG shall be provided to the Participating Transmission Owners to be posted on the SIRPP website and shall become effective once posted on that website (<http://www.southeastirpp.com>), which postings shall be made within a reasonable amount of time upon receipt by the Transmission Owners. Accordingly, the following provisions contained under this Meeting Procedures heading provide a starting-point structure for the SIRPPSG, which the SIRPPSG shall be allowed to change.

### **Meeting Chair**

A stakeholder ~~elect~~ elected member of the SIRPPSG will chair the SIRPPSG meetings and serve as a facilitator for the group by working to bring consensus within the group. In addition, the duties of the SIRPPSG chair will include:

1. Developing mechanisms to solicit and obtain the input of all interested stakeholders related to inter-regional Economic Planning Studies.
2. Ensuring that SIRPPSG meeting notes are taken and meeting highlights are posted on the SIRPP website (<http://www.southeastirpp.com>) for the information of the participants after all SIRPPSG meetings.

### **Meetings**

Meetings of the SIRPPSG shall be open to all SIRPPSG members interested in inter-regional Economic Planning Studies across the respective service territories of the Participating Transmission Owners. There are no restrictions on the number of people attending SIRPPSG meetings from any ~~organization~~ interested party.

### **Quorum**

Since SIRPPSG membership is open to all ~~valid stakeholders~~ interested parties, there are no quorum requirements for SIRPPSG meetings.

### **Voting**

In attempting to resolve any issue, the goal is for the SIRPPSG to develop consensus solutions. However, in the event consensus cannot be reached, voting will be conducted with each SIRPPSG member's organization represented at the meeting (either physically present or participating via phone) receiving one vote. The SIRPPSG chair will provide notices to the SIRPPSG members in advance of the SIRPPSG meeting that specific votes

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will be taken during the SIRPPSG meeting. Only SIRPPSG members participating in the meeting will be allowed to participate in the voting (either physically present or participating via phone). No proxy votes will be allowed. During each SIRPP cycle, the SIRPPSG members will propose and select the inter-regional Economic Planning Studies that will be performed during that particular SIRPP cycle. The SIRPPSG will annually select up to five (5) inter-regional Economic Planning Studies, including both Step 1 evaluation(s) and any Step 2 evaluations, with any such Step 2 evaluations being performed for the previous years Step 1 studies for the pertinent transfers. Each organization represented by their SIRPPSG members will be able to cast a single vote for up to five Economic Planning Studies that their organization would like to be studied within the SIRPP cycle. If needed, repeat voting will be conducted until there are clear selections for the five Economic Planning Studies to be conducted.

### **Meeting Protocol**

In the absence of specific provisions in this document, the SIRPPSG shall conduct its meetings guided by the most recent edition of *Robert's Rules of Order, Newly Revised*.

### ***Data and Information Release Protocol***

SIRPPSG members can request data and information that would facilitate their ability to replicate the SIRPP inter-regional Economic Planning studies while ensuring that CEII and other confidential data is protected.

### **CEII Data and Information**

The following outlines the process the SIRPPSG members would use to obtain ~~the~~ CEII data and information used in the SIRPP.

1. Request and obtain from FERC the FERC Form No. 715 data (that includes CEII data) for the Participating Transmission Owners, where applicable.
2. Have a current SERC Confidentiality Agreement in place.
3. Have a current SIRPP Confidentiality Agreement in place.
4. Formally request the data on the SIRPP website (<http://www.southeastirpp.com>) with attestations that they have fulfilled the above 3 steps.

The SIRPP Participating Transmission Owners will process the above requests, approve/deny the request, and if approved, provide the data to the SIRPPSG member.

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### Non-CEII Confidential Information

The Participating Transmission Owners will make reasonable efforts to preserve the confidentiality of information that is confidential but not CEII in accordance with the provisions of the Tariff and the requirements of, and/or agreements with, SERC and/or agreements with the other Participating Transmission Owners. Such confidential information supplied by an entity that is not a “public utility” for purposes of Section 201(e) of the Federal Power Act will not be disclosed to third parties, or posted on the SIRPP website, or otherwise made publicly available absent written consent from that nonjurisdictional entity or an order from a Court or governmental agency having requisite jurisdiction over the Participating Transmission Owner that is in possession of such confidential information (“governmental body”). In this regard, it is incumbent upon the nonjurisdictional entity to provide prior notice to such Participating Transmission Owner of the entity’s not being such a “public utility,” and the Participating Transmission Owner shall bear no responsibility for such entity’s claim of nonjurisdictional status or failure to claim such status.

Confidential information supplied by an entity that is a “public utility” for purposes of Section 201(e) of the Federal Power Act shall be made available upon request, subject to the provisions below, to those SIRPPSG members who have executed an appropriate confidentiality agreement. Importantly, if information should prove to be both competitively sensitive/otherwise confidential and CEII, then the requirements of both this section (including the following two requirements) and the previous section would apply.

1. The form of the appropriate confidentiality agreement shall be posted on the SIRPP website.
2. Resource-specific data shall not be made available by the Participating Transmission Owners if the data has been designated confidential by the data provider or if the data can be used to: (a) Determine security constrained unit commitment or economic dispatch of resources; or (b) Perform an economic evaluation of costs and benefits.

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**Dispute Resolution**

Any procedural or substantive dispute between a stakeholder and a Participating Transmission Owner that arises from the SIRPP will be addressed by the Participating Transmission Owner's dispute resolution procedures in its respective Regional Planning Process. In addition, should the dispute only be between stakeholders with no Participating Transmission Owner involved (other than its ownership and/or control of the underlying facilities), the stakeholders will be encouraged to utilize the Commission's alternative means of dispute resolution.

Should dispute resolution proceedings be commenced in multiple Regional Planning Processes involving a single dispute among multiple Participating Transmission Owners, the affected Participating Transmission Owners, in consultation with the affected stakeholders, agree to use reasonable efforts to consolidate the resolution of the dispute such that it will be resolved by the dispute resolution procedures of a single Regional Planning Process in a single proceeding. If such a consensus is reached, the Participating Transmission Owners agree that the dispute will be addressed by the dispute resolution procedures of the selected Regional Transmission Planning Process.

Nothing herein shall restrict the rights of any party to file a Complaint with the Commission under relevant provisions of the Federal Power Act.

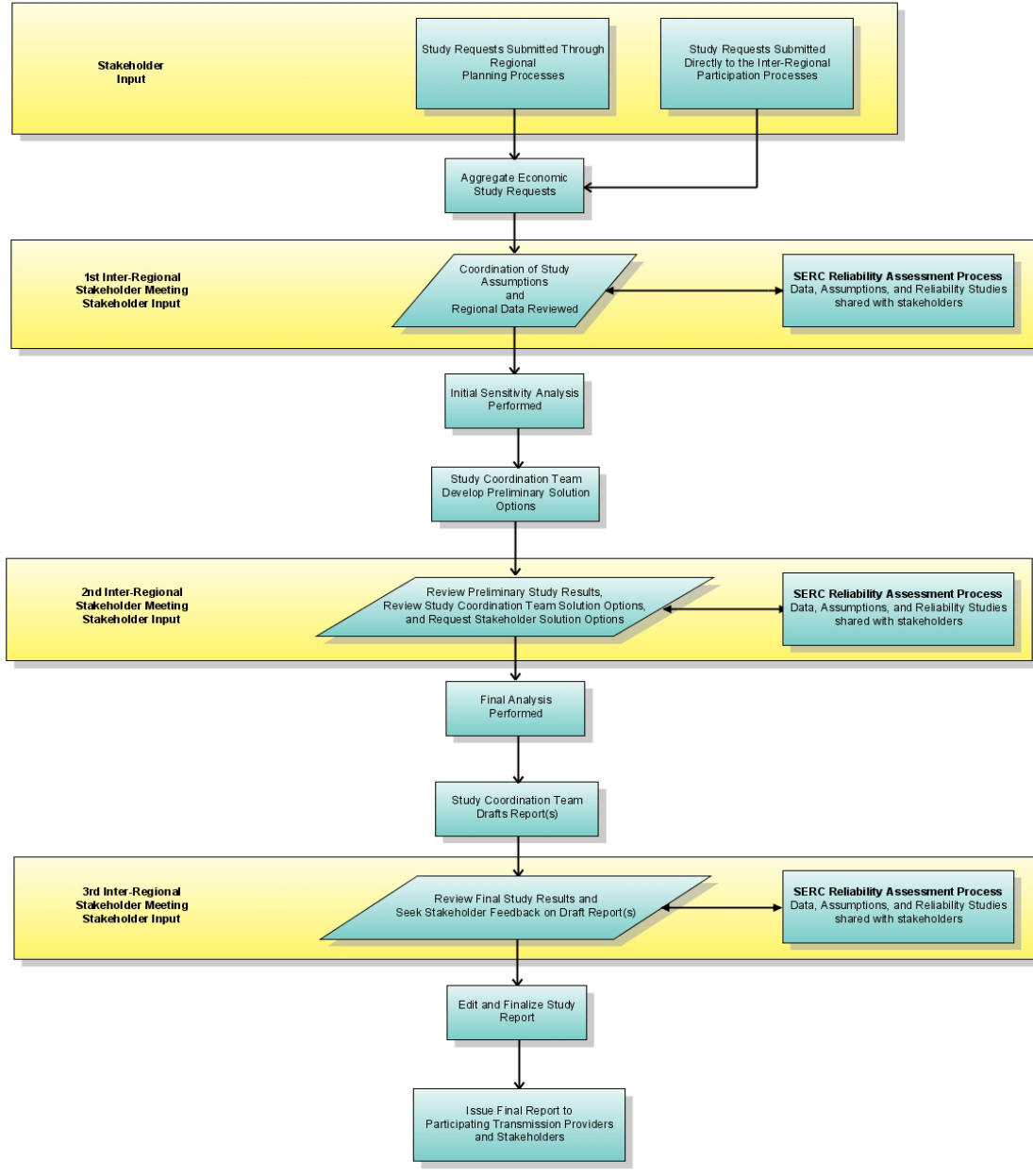
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**Southeast Inter-Regional Participation Process Diagram:**



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