



# North American Energy Standards Board

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## NORTH AMERICAN ENERGY STANDARDS BOARD

### 2004 WEQ Annual Plan

Approved by the Board of Directors December 4, 2003

Modified by the WEQ Executive Committee – February 24, 2004

Item Description	Completion <sup>1</sup>	Assignment
<b>1 Develop business practices standards as needed to complement reliability standards</b>		
(a) Develop business practice standards to support and complement NERC reliability standards, NERC policies and NERC standards authorization requests (SARs). Current NAESB activities underway to develop business practice standards that are supportive of this annual plan item are:		Standards Review Subcommittee (SRS) <sup>2</sup>
i. Develop Inadvertent Interchange Payback Business Practices		BPS (IIPTF)
ii. R03013 – Coordinate Interchange		ESS
Status: Complete		SRS
iii. R03014 – Coordinate Operations		SRS
iv. R03017 -- Operate Within Limits		SRS
v. Balance Resources and Demand		SRS
vi. Facility Ratings		
(b) Develop business practice standards applicable to the transition period from NERC policies to NERC reliability standards.		SRS/Variou <sup>3</sup>
<b>2 Develop and Maintain Business Practice and Communication Standards for OASIS and Electronic Scheduling</b>		
(a) Develop and/or maintain <i>business practice standards</i> as needed for OASIS and electronic scheduling including determining which, if any, ESC/OSC and other related industry groups' business practices and standards should be adopted as NAESB standards. Specific items to address include:		Electronic Scheduling Subcommittee (ESS)
i. OASIS Phase IA		ESS
(a) Adoption of business practices per FERC Order 638		
Status: Underway		

<sup>1</sup> Dates in the completion column are by end of the quarter for completion by the assigned committee. The dates do not necessarily mean that the standards are fully staffed so as to be implementable by the industry, and/or ratified by membership. If one item is completed earlier than planned, another item can begin earlier and possibly complete earlier than planned. There are no begin dates on the plan.

<sup>2</sup> The Standards Review Subcommittee scopes, identifies and defines the standards development work to be done to support and complement NERC policies, SARs and NERC reliability standards. Once completed, the request, initial review document, scoping document and other work papers are transferred to the appropriate standards development subcommittee.

<sup>3</sup> The North American Electric Reliability Council Transition Team is responsible for establishing a plan to convert existing NERC policies to NERC reliability standards. Co-committant with that conversion, NAESB will develop corresponding NAESB business practices. Michael Desselle, Rae McQuade and Charles Yeung are representatives of NAESB on the NERC Transition Team.



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ii. OASIS Phase II per FERC ANOPR (Docket no. RM00-10-000) and subsequent orders		ESS
1. Adoption/maintenance of ESC use cases		ITS
2. Adoption/maintenance of Functional Requirements Document		ESS
3. Develop and Maintain business practices to support and implement the ESC use cases		
(b) Develop and/or maintain <i>standard communication protocols</i> and cybersecurity requirements as needed, including related industry standard communication protocols and cybersecurity requirements		Information Technology Subcommittee (ITS)
(i) OASIS Phase IA Adoption of S&CP version 1.4		
Status: Underway		
(ii) OASIS Phase II per FERC ANOPR (Docket no. RM00-10-000) and subsequent orders Development of S&CP document		
(iii) NERC PKI initiative		
<b>3 Develop business practices standards to Improve the Current Operation of the Wholesale Electric Market</b>		
(a) Develop business practice standards needed to complement or assist specific seams mitigation efforts initiated by or coordinated with the NERC, the IRC, RTOs or ISOs, or other regional entities.		Seams/Variou s <sup>4</sup>
<b>4 Determine the need for and develop, if necessary, standard(s) requests for electric or gas standards required to provide additional flexibility in generation scheduling (including gas nominations).</b>		
Status: Underway		Gas Electric Coordination Task Force <sup>5</sup>
<b>PROVISIONAL ITEMS</b>		
1 Develop standards and model business practices in accordance with FERC orders and rules issued in the SMD docket (RM01-12-000), or pursuant to Order Nos. 888 or 2000, or otherwise directed by the FERC.		

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<sup>4</sup> The Seams Subcommittee scopes, identifies and defines the standards development work to be done related to the seams catalog. After seams catalog items are assigned to NAESB by the Joint Interface Committee, and the Seams Subcommittee completes its review and analysis, the request, initial review document, scoping document and other work papers are transferred to the appropriate standards development subcommittee.

<sup>5</sup> The Gas Electric Coordination Subcommittee is an ad hoc subcommittee comprised of participation by all four quadrants of NAESB to address the issues outlined in request number R03031, submitted by TVA and amended on November 20, 2003.



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	<b>Item Description</b>	<b>Completion<sup>1</sup></b>	<b>Assignment</b>
2	Respond to FERC inquiries pertaining to business practice standard development and keep FERC informed on the nature and effectiveness of coordination activities with other standards setting organizations.		
3	Develop business practice standards related to FERC's forthcoming generation interconnection orders (large and small generators), in Docket Nos. RM02-01-000 and RM02-12-000.		
4	FERC Reporting of Electricity Prices		
5	Develop business practice standards as requested by the regional and state advisory groups.		
6	Develop electric purchase and sales contract.		

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## Appendix

### Comments Accompanying the Action Items and Provisional Items For the 2004 Annual Plan Adopted by the Executive Committee – October 7, 2003

#### ACTION ITEMS:

- 1a The original 1(a) from the 2003 plan is implied and 1(b) and 1(c) have been rewritten as a part of this plan: 1(a) Apply NERC/NAESB MOU provisions in reviewing proposed reliability standards for their business practice implications, 1(b) Review existing NERC reliability policies and standards for their business practice implications, 1(c) Review each of the SARs in light of the NERC/NAESB MOU.
- 1b This is a new item that reflects the recent NERC decision to create Transition team. NAESB has been asked to join the Transition Team which is led by Gerry Cauley. NAESB members on the team are Charles Yeung, Rae McQuade and Michael Desselle.
- 2a The Information Technology Subcommittee has been formed and is currently reviewing existing lists of enhancements for OASIS 1A and OASIS 2. A NAESB Electronic Scheduling Subcommittee was created but is inactive awaiting input from the existing ESC industry group
- 2b The PKI request R03007 has been assigned to the NAESB WEQ to be addressed which is a portion of this annual plan item.
- This item also corresponds to the 2003 WEQ Annual Plan item 4(h) Review activities of NERC CIPAG in light of NERC-NAESB MOU regarding cyber security requirements for their business practice and system communication standards implications.
- 3a A seams catalog is under development now and will identify many of the items to be included under this action item. This item was originally numbered item 4 in the 2003 WEQ Annual Plan. Several items were deleted, and will be added back to the plan if they are requested through the comments or meetings on the plan and the requesters indicate a willingness to participate in the standards development effort or in the drafting effort. The items removed from the 2003 plan are: 4(a) Establish a standardized electric trading day; 4(b). Identify and develop business practices on the public dissemination of market information.
- Other items from the 2003 WEQ Annual Plan were reordered and renamed such as: 4(d) Develop business standards as necessary to resolve seams issues between ISOs and RTOs; 4(c) Establish standard business practices relating to: i) Definition and treatment of firm/nonfirm power; ii) Definition and treatment of firm/nonfirm transmission; iii) Provision of reserves for transactions across multiple control areas, 4(e) Develop standards for data requirements, data exchange and scheduling of day-ahead and real-time bilateral markets; and 4(h) Review activities of NERC CIPAG in light of NERC-NAESB MOU regarding cyber security requirements for their business practice and system communication standards implications.
- Some items on the 2003 WEQ Annual Plan were considered assumed in each of the action items, so they were not specifically highlighted as a separate action item, such as : 4(f) Examine business practices and definitions currently in use to determine applicability on a North American basis and 4(g) Catalogue, assess and prioritize existing “standards” that have significant business practice implications.
- 4 This is a new item, not in the 2003 plan. It was added at the August 5 Executive Committee meeting.



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### Appendix

#### Comments Accompanying the Action Items and Provisional Items

#### For the 2004 Annual Plan Adopted by the Executive Committee – October 7, 2003

##### PROVISIONAL ITEMS:

- 1 These items (originally items 3 and 7 of the 2003 Annual Plan) were reclassified as provisional and will be acted upon as such FERC actions are taken.
- 4 This is a new item, not in the 2003 plan. It was added at the August 5 Executive Committee meeting.
- 5 This is a new item, not in the 2003 plan. It was added at the August 5 Executive Committee meeting.
- 6 There is industry interest, but there is neither consensus to move forward at this time nor may resources be available.

On August 5, several of the WEQ EC members discussed possibly preparing a request that would add an item to the 2004 annual plan to develop a master service agreement. The request was prepared but subsequently withdrawn by the submitter due to an expected lack of resources.



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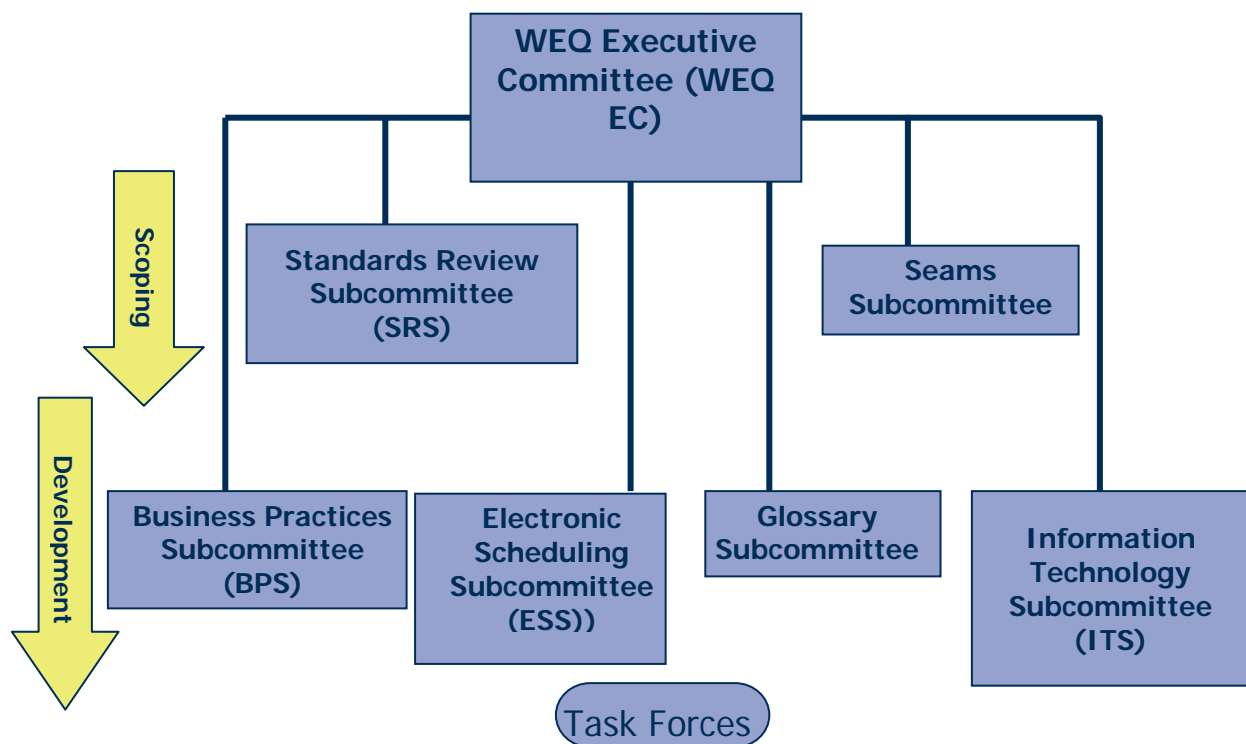
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### NAESB Wholesale Electric Quadrant Committee Structure



Subcommittee Leadership is:

Executive Committee: Lou Oberski (WEQ EC Chair) and Steve Cobb (WEQ EC Vice Chair)

Standards Review Subcommittee: Charles Yeung and Raj Rana

Seams Subcommittee: Steve Cobb and Joe Rossignoli

Business Practices Subcommittee: Bob Goss

Electronic Scheduling Subcommittee: Joel Dison, Andy Rodriguez and John Simonelli

Glossary Subcommittee: Tony Reed and Sherri Monteith

Information Technology Subcommittee: Monroe Landrum and Alan Johnson