OASIS Phase II

Approaching the Problem

General Discussion on Strategy and Philosophy

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How did we get here?

- OASIS 1A
- Fax Tagging
- E-Mail Tagging
- Electronic Tagging
- XML Electronic Tagging

- OASIS Phase II/Electronic Scheduling ANOPR

Core Objectives

- Customer-driven Development
- Incremental Value
- Cost Effective
- Market Design Neutral
- Leverage Existing Tools…

  without being bound by those tools

How do we start?

- Begin with the ESC Use Cases
- Evaluate and Define OASIS functionality
- Identify Modular Components
- Determine Architecture
- Develop Approach

Architecture

- This should NOT necessarily be a discussion on technical issues
- Focus should be on deployment strategy that meets core objectives
- Identify modular groups where appropriate

Approach

- Should focus on incremental deliverables to provide ongoing value
- Phased approached to functionality will allow amortized cost burden to companies
- Can also be utilized to address regional diversity
  - If upgrades can be done on an incremental basis, we can work to ensure backward compatibility where possible

Ongoing Efforts

- IDC – Next Generation
  - No dependence on tags
- CIM Market Extensions
  - Coordination between RTOs
- PJM/MISO Congestion Management
  - Quantifying internal dispatch
- Information Technology Council
  - Facilitated Checkouts, Other Initiatives

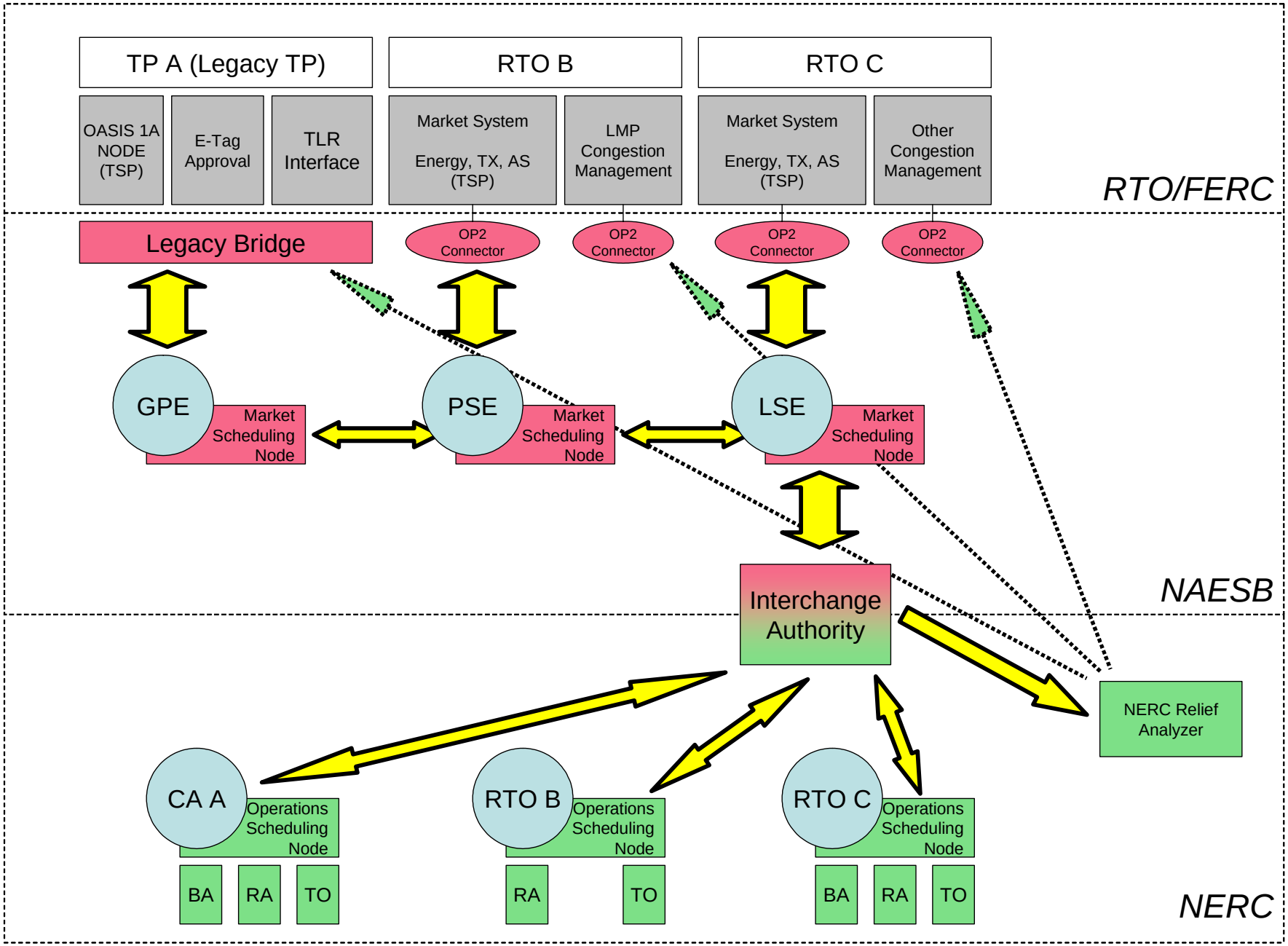
Collaboration

- Should encourage participation to meet openness goals and ensure coordinated attack – minimal duplication of effort
  - NAESB Groups
    - Seams Collaborative
    - Information Technology Subcommittee
  - NERC Community
    - Interchange Subcommittee
    - Transaction Information Systems Working Group
    - Operations Reliability Subcommittee
    - Interchange Distribution Calculator Working Group
  - ISO/RTO Council
    - Information Technology Committee

What is OASIS (my thoughts)?

- A market-oriented solution that optimizes the market interchange scheduling function
  - *This would be developed by NAESB*
- A reliability-oriented solution that meets the needs of the functional model with regard to operational interchange scheduling
  - *This would be developed by NERC*
- A set of interfaces to allow for market activity within a ISO/RTO/TP
  - *This would be developed by the ISO/RTO/TP, but would align with the NAESB functions*
- A "market/reliability interface" between the two, called the Interchange Authority, that would tie markets and reliability together
  - *This would jointly be developed by NERC, NAESB, and the IRC*

Proposed Vision



Suggested Timeline

- Spring/Summer 2004 – Develop Functional Design Documents
  - Detailed Scope
  - ESC Use Cases
- Summer/Fall 2004 – Develop Strategic Architecture Plan
  - Modules
  - Compatibility plans and requirements
- Winter 2004 – Identify Implementation Plan
- 2005 – Design Phase I Components
- 2006 – Implement Phase I Components, Design Phase II Components
- 2007 – Implement Phase II Components, Design Phase III Components
- 2008 – Implement Phase III Components

Initial Phases

- Phase I
  - OASIS Phase I Legacy Bridge
  - E-Tag Legacy Bridge (replace Authority with limited IA functionality)
  - IDC Architectural Split (Impact Calculator vs. TLR Process)
- Phase II
  - OASIS Phase II Functions
  - Legacy Bridge Upgrades
  - Operations Scheduling Tools (Functional Model)
  - Enhanced IA to Reliability Interface
  - IDC Next Generation
- Phase III
  - Electronic Scheduling
  - Market to IA Interface

Question

- Do we agree upon the core principles?
  - Customer-driven Development
  - Incremental Value
  - Cost Effective
  - Market Design Neutral
  - Leverage Existing Tools without being bound by those tools

Question

- Does everyone agree with these next steps?
  - Functional Design Work
    - Begin with the ESC Use Cases
    - Evaluate and Define OASIS functionality
  - Identify Modular Components
    - Identify key components
  - Determine Architecture
    - Group components logically based on dependencies
  - Develop Approach
    - Build implementation plan for phased approach

Key Components

- Develop appropriate representation across the industry
- Establish “governance” issues
  - Identify leadership
  - Determine other key liaisons and roles
  - Set up meeting schedules
  - Agree to vision and scope
  - Establish milestones and deliverables

Questions?