JOINT UTILITIES OF NEW YORK

DISTRIBUTED SYSTEM PLATFORM (DSP) ENABLEMENT QUARTERLY NEWSLETTER

WHAT'S INSIDE

Advancing Grid of the Future: Phase 3 Coordination and Capabilities Development

Continuing Development of the Capabilities Framework

In Q1, the Joint Utilities continued to engage with DPS and Guidehouse to learn of updates to the Grid of the Future capabilities framework, including revisions to capability definitions and organization across domains.

In early March, DPS and Guidehouse shared their plans to refresh the capabilities framework based on stakeholder feedback. This continued development is intended to strengthen the framework and support a more practical foundation for Phase 3 recommendations.

The Joint Utilities also continued emphasizing the importance of a clear, transparent progression framework that can support meaningful planning and implementation. As this work moves forward, the utilities remain focused on ensuring that capability definitions, maturity expectations, and related recommendations are structured in a way that is understandable, actionable, and tied to customer and system value.

Looking Ahead

As the Grid of the Future proceeding advances, stakeholders can expect:

- Continued coordination among the Joint Utilities, DPS, NYSERDA, and Guidehouse on Phase 3 materials and sequencing;
- Additional refinement of the capabilities framework and related implementation concepts; and
- Ongoing efforts to align Grid of the Future outcomes with utility planning processes and broader statewide flexibility initiatives.

Across this work, the Joint Utilities remain focused on supporting a practical Grid of the Future roadmap that enables flexible resources, maintains reliability, and helps deliver customer value.

EV Incentive Programs Adapt to Fit the Market; Stakeholder Engagement and Program Reporting Continues; Important Make-Ready Program Updates

Changes forthcoming to the Medium- and Heavy-Duty Pilot

In May 2025, Central Hudson, Con Edison, National Grid, and Orange & Rockland filed a petition requesting eligibility changes to the Medium- and Heavy-Duty Pilot. The Petition was approved with modifications by the Commission's January 23, 2026 Order. The Order authorized the utilities to incentivize shared hub MHD charging sites through the Pilot and removed the requirement for incentivized fleets to participate in a vehicle replacement voucher program. It also approved the request to expand customer-side cost coverage for MHD charging sites, with modifications and introduced new data reporting requirements for the utilities' semi-annual reports.

These changes apply to all of the Joint Utility MHD Pilot programs. The utilities worked in consultation with Staff to revise the Pilot Implementation Plan to reflect the new rules and eligibility. This updated Implementation Plan was filed on DMM on April 23.

Residential Managed Charging Program Updates

The Joint Utilities filed the Comprehensive Residential Managed Charging Report on March 16 as required by the Commission's August 18, 2025 Order Modifying Managed Charging Programs. The report gives an overview of the residential managed charging programs, key metrics about enrollment and participation in the programs, insights into customer engagement and participant satisfaction, information on the programs' grid impacts, and lessons learned and recommendations from the utilities for future consideration. The Joint Utilities also convened a technical conference about the residential managed charging programs and the Comprehensive Report on March 31. The Comprehensive Report can be

found on DMM under Case 18-E-0138 and the technical conference recording and slides can be found on the Joint Utilities website.

Recent Program Reporting

The Joint Utilities completed their semi-annual EV program reporting requirements on March 1, with filings reporting on the Make-Ready Programs, Medium- and Heavy-Duty Pilots, Load Management Technology Incentive Programs, and where applicable, Micromobility Make-Ready Programs.

On January 30, the utilities filed their Managed Charging Implementation Plans (MCIPs) for the Residential Managed Charging Programs.

All publicly available filings can be found on DMM under Case 18-E-0138.

Stakeholder engagement and next steps on EV infrastructure interconnection

The last newsletter described utility and customer documentation related to the EV infrastructure interconnection process that was due to be filed by the Joint Utilities in December. The Queue Management Utility Manual was filed by the Joint Utilities on December 18. In addition, each utility filed a customer guide providing helpful guidance and resources for participants in their respective EV Make-Ready Programs to assist with the interconnection process. All documents can be found on DMM under Case 18-E-0138.

On January 21, the utilities hosted a technical conference to provide information to stakeholders on the recently filed documents. The conference summarized the organization and contents of the Utility Manual and shared information about the utility-specific customer guides. The slides presented and a recording of the conference can be found on DMM under Case 18-E-0138.

In the Commission's Order Adopting Proposal for Queue Management with Modifications, which directed these filings and the technical conference, DPS Staff was also ordered to propose a scoping document as a first step to addressing issues related to electric load interconnection. Staff requested an extension until June 1 to make this filing, which was granted on March 11.

Changes Forthcoming to EV Make-Ready Program

On March 23, the Commission issued the Order Denying Petition and Making Other Findings, which denied the Joint Utilities' February, 2025 petition requesting Commission authorization to continue the Make-Ready Program with modifications during the program review period. The Order directs the end of the Level 2 Make-Ready Program within 30 days and a pause for the DCFC Make-Ready Program, with re-starting contingent on the utilities meeting certain data reporting thresholds for chargers in their programs. Updated program materials, including implementation plans, participant guides, and data reporting compliance plans will become available as these changes come into effect.

Finally, the Order also noted that a DPS Staff Whitepaper on the program is forthcoming as part of the end of program review. This will present further opportunity for stakeholders to comment on future program needs as well as criteria needed to define success of a potential future program.

Advancing Hosting Capacity Transparency and Map Enhancements

Advancing Hosting Capacity Transparency and Stakeholder Tools

During the first quarter of 2026, the Joint Utilities' Hosting Capacity Working Group (HC WG) focused on improving the usability and transparency of hosting capacity maps while preparing enhancements that will be introduced in the April 2026 map refresh. Work during this period centered on strengthening stakeholder guidance on how to interpret hosting capacity data, implementing enhancements to storage hosting capacity maps, and coordinating with broader statewide data initiatives.

Improving Stakeholder Guidance on Hosting Capacity Maps

To support more consistent understanding of hosting capacity tools, the Joint Utilities finalized two new stakeholder resources designed to clarify how the maps should be interpreted and used during early project development.

The first resource is a Centralized Hosting Capacity FAQs, which provides high-level explanations of key concepts reflected on the maps, including the differences between photovoltaic (PV) export hosting capacity, battery energy storage system (BESS) charging and discharging hosting capacity, and electrification thermal headroom. The FAQs also explain how hosting capacity values are calculated and reinforce that the maps represent modeled screening-level thresholds rather than guarantees of interconnection.

The second resource is a Hosting Capacity Map Use-Case Guidance document, which translates technical concepts into practical examples of how stakeholders can use the maps. The guidance highlights appropriate uses—such as early-stage site screening, comparing potential project locations, and supporting pre-application discussions with

utilities—while clarifying that detailed interconnection studies and engineering analyses remain necessary for project development.

These resources are intended to reduce confusion, support more consistent interpretation of hosting capacity information across utilities, and enable more productive early conversations between developers, customers, and utilities.

The materials are available here:

- Centralized Hosting Capacity FAQs: HERE
- Hosting Capacity Map Use-Case Guidance: HERE

Enhancing Storage Hosting Capacity Maps

The HC Working Group also advanced enhancements to the battery energy storage hosting capacity maps, which will be included in the April 2026 refresh cycle.

These updates will introduce new informational fields that show how approved charging and discharging schedules can affect available hosting capacity. Because battery systems can operate differently depending on when they charge or discharge, incorporating schedule-based assumptions can provide additional insight into how storage projects may interact with grid constraints.

To make these changes easier to interpret, the updated maps will display the impact of scheduled operation as absolute megawatt (MW) differences relative to unrestricted operation. These values will appear within existing map pop-ups rather than as new map layers, helping maintain consistent user experience while providing new information.

For utilities with defined interconnection schedules (Central Hudson, National Grid, NYSEG RGE), the BESS HC Maps will present one conservative schedule-based value as a screening

reference. This approach provides a consistent starting point for stakeholders while recognizing that operational strategies may vary across projects.

These enhancements are intended to help developers and other stakeholders better understand potential system constraints earlier in the planning process and support more informed conversations during pre-application engagement with utilities.

JU Provides Critical Data to Support IEDR Phase 2

JU Collaboration Helped Deliver High-Quality Data to the IEDR Platform

In Q1 2026, the JU extended its collaboration in support of the IEDR program and its focus on data acquisition, consistency, and quality for the data fields outlined in Appendix B of the IEDR whitepaper. Efforts continued across the three Utility Coordination Group (UCG) Subcommittees: Rate Plan Data, Customer Data, and Network Data. These activities, which were supplemented by one-one-one working sessions between the utilities and the IEDR Team, resulted in further development of data models and transfer specifications for key energy data sources.

In the UCG Rate Plan Data Subcommittee, the utilities worked with the IEDR Team on a data model and associated data transfer specification to facilitate enhanced analytics and consistent rate comparisons for IEDR platform users and ratepayers. These activities are intended to help users better understand the rate components of each utility they use (i.e. electric, gas and/or steam) as well as how they impact their monthly bill. In future versions, this will help provide a platform for customers to investigate how potential energy and/or other investments (such as roof top solar, purchasing an electric vehicle or converting to a heat pump) will impact their energy spending to make a more informed purchase. Throughout Q1, the JU provided feedback on several aspects of the data model, including required data fields, data model relationships, manual metadata, holiday enumerations, variant labeling, rate riders, and technical field definitions. This ongoing dialogue is critical to finalizing the revised draft specification in time for planned testing in April.

Similarly, the UCG Customer Data Subcommittee focused on revisions to the draft data model. In Q1, the JU shared updates with the IEDR Team on the status of test file submissions and discussed points for clarification in the draft data model. The IEDR Team

made additional efforts to troubleshoot transfer failures and ensure prompt issue resolution, notably in relation to tracking of versions for file transfers. These collaborative efforts on several items related to the data model enabled the utilities to develop sample files for testing under the Customer Data Transfer Specification, completing a positive step toward developing a finalized production data transfer specification. In Q2, the JU and IEDR Team are targeting a key milestone of refining and finalizing the data model in advance of the planned March 27 production data transfer milestone.

Finally, for the UCG Network Data Subcommittee, the JU and the IEDR Team reached a shared understanding regarding the proposed timeline for developing and finalizing the latest network data model and the associated data transfer specification. Together, the group agreed on the importance of a more flexible approach. As part of this consensus, the IEDR Team is exploring how insights from other data acquisition efforts—such as the customer data pipeline—could be leveraged to streamline processes and support timely, coordinated progress. The JU will continue working on internal analyses, providing updated timelines to the IEDR Team, and collaborating with the IEDR team as process and timelines continue to evolve.

The IEDR Team released its final network data test specification in early March and is working with the utilities to develop the test files and build-out of the data ingestion pipelines. Collaboration sessions focused on data quality improvements and clarified definitions, underscoring the importance of identifying data privacy categorizations within the network data dictionary, and in certain cases establishing clear definitions of confidential data (including critical energy infrastructure information, CEII) and public data. The utilities began developing test files in March, with anticipated completion of production data transfers by the end of Q2.

JU Responding to Information Requests to Support Future of IEDR Program

In January, the IEDR Team performed a mapping exercise to identify discrepancies between the current data transfer specifications and the data fields outlined in Appendix B of the IEDR whitepaper. This resulted in the development of a data acquisition roadmap and process designed to collect all the required data to support the IEDR. The process leverages various information requests (IRs) to collect the remaining IEDR data items which are needed to draft data models and specifications. In Q1 the JU worked to fulfil the first set of IRs related to building data and network load data. These data sets capture time-series load/usage data and forecasts tied to network assets like transformers and service points and data on existing building stock, forecasted development plans, and links to building energy usage and assessments.

Going forward, the IRs will be expanded to cover 11 distinct categories. In late February, the IEDR Team notified the JU that additional requests will be coming in Q2, with the next request focused on distributed energy resources (DERs) and customer programs (focusing on demand response, DR).

JU Continue to Take Actions to Facilitate DER Interconnection

The JU kicked off 2026 with a discussion on pre-CESIR checklists that each company is preparing. The JU aligned on what these checklists should contain and how they would be made publicly accessible, recognizing that clearer pre-study requirements would reduce rework and shorten CESIR timelines. The JU will release these checklists publicly in the near future.

National Grid is currently in the process of implementing their flexible interconnection pilot, titled 'active resource integration'. The pilot will span 7 substations and enable up to 30–60 MW of flexible projects. The pilot also introduces prorata curtailment, dynamic BESS discharge limits, and integrated SIR aligned cost share rules. The pilot will provide developers with an option to access DER interconnection in constrained areas.

During the first monthly ITWG meeting of the year with DPS and Industry, the JU discussed several topics, including National Grid's N-1/ DTT implementation, self-performance / self-build pilot, EV load vs. SIR/ V2G coordination, and questions for the JU on how BESS charging behavior is studied. Regarding their N-1/ DTT implementation, National Grid confirmed applicability across DER types (including storage), a study time guardrail (aim to meet the standard 60 business days, with early notice to developers if additional time is needed), and future makeready standards for field deployment. Developers with completed CESIRs will be offered a restudy on request to evaluate DTT enabled alternatives. National Grid also presented on their self-build solution framework. The company outlined the design framework, adherence to SIR milestone payments, contractor qualification, and committed to a webinar plus an agreement template by the end of March. The self-build solution is expected to provide a clearer, faster way for qualified

developers to deliver network upgrades, potentially compressing critical path timelines for interconnection. On the EV load and SIR/V2G Coordination and BESS charging topics, industry stakeholders mentioned that they had documented misalignments between EV load studies and DER interconnection studies for bidirectional chargers coupled with BESS. DPS asked Industry to bring concrete case examples so the JU can assess queue interactions, sequence dependencies, and transparency needs. The JU clarified that load (new business) and DG (SIR) processes run in parallel and can inform each other but are administratively distinct. This is an important consideration for V2G proponents to plan around.

During the February monthly meeting with DPS and Industry, DPS directed the JU to prepare updated versions of the technical cost matrix and updated materials on the cost estimation process. The JU are aiming to present both these materials within the next couple of months. The JU also discussed that they would hold additional discussions with DPS on the topic of self-build solutions and next steps. The JU also had a discussion with stakeholders and industry on how interconnection studies and queue positions are handled when projects downsize or request restudies. Utilities compared and clarified their respective CESIR re-study practices, capacity reservation approaches, and impacts on hosting capacity availability.

The JU are currently discussing a response to the January 23, 2026 Order on Interconnection Queue Management related to “bridge to wires” solutions to enable DG projects to meet Internal Revenue Service (IRS) deadlines to receive the investment tax credit (ITC). The JU discussed potential solutions—such as temporary derating, limited export options using the UL 1741 CRD for PCS, and alternative circuit configurations—that could allow DERs to interconnect safely before full distribution upgrades are completed.

The JU have been ordered to compile discussion points for conversations on this topic with DPS and Industry by July 1, and to file a response by the end of the year.

JU Continue to Support NYISO's Implementation of the 2019 DER Participation and FERC Order 2222 Models

The JU has continued to productively engage with the NYISO on the rollout of the 2019 DER Participation Model and the FERC Order 2222 Model.

In the first quarter of 2026, conversations centered around the topic of aggregations with injecting DERs into the municipal utility territories participating in the DER Participation Model (in cases where municipal utilities opt in into the DER Aggregation model). In late 2025, NYISO released proposed revisions to its DER Aggregation Manual, mentioning that operational coordination and a 3-way agreement between aggregators, municipalities, and the relevant transmission owner (TO) would be required in such scenarios. The JU, as the TOs in NY, had concerns with this language since they have no operational visibility into a municipality's operations. This could create operational and reliability issues for the utility.

NYISO was responsive to the JU's concerns and decided to forgo implementing the 3-party agreement. Instead, NYISO has proposed new language in its DER aggregation manual that would require the municipal utility to coordinate with the relevant TO to manage system safety and reliability in the presence of aggregations with injecting resources. The municipal utility as the distribution utility (DU) must coordinate review of enrollment, verify that the DER can operate safely in the DU territory as well as the TO's territory, and if necessary, enter into new operating agreements with the TO. Discussions on this topic are expected to continue with stakeholders in NYISO's ICAPWG as NYISO seeks to bring these Aggregation Manual revisions to Committee votes.

Tools and Informational Sources

Advanced Forecast	**Joint Utilities** Joint Utilities: Overview of Currently Accessible System Data Joint Utilities: Load Forecasts Joint Utilities: Historical Load Data				
Beneficial Locations	**Joint Utilities** Joint Utilities: Beneficial Locations				
Customer Data	**Central Hudson** Central Hudson: Privacy Policy	**Con Edison** Con Edison: Customer Energy Data	**National Grid** National Grid: NY System Data Portal	**NYSEG RG&E** NYSEG: Energy Manager RG&E: Energy Manager	**O&R** O&R Information on Requesting Aggregate Whole Building Data O&R Energy Service Company EDI O&R New York Rates and Tariffs O&R Share My Data
DER Integration & Inter-connection	**Joint Utilities** Joint Utilities: Distributed Generation Joint Utilities: Interconnection Joint Utilities: SIR Pre-Application Information				
	Central Hudson Central Hudson: Distributed Generation Homepage Central Hudson: Interconnection Queue	**Con Edison** Con Edison: Private Generation Energy Sources	**National Grid** National Grid: Systems Data Portal National Grid: Interconnection	**NYSEG RG&E** A Developer's Guide to the NYSEG/RG&E Interconnection On-line Application Portal NYSEG – Online Portal RG&E - Online Portal *SIR Inventory requests:* NYRegAdmin@avangrid.com	**O&R** O&R: Distributed System Platform O&R Private Generation Energy Sources

Energy Efficiency	**Central Hudson** Central Hudson: Energy Efficiency	**Con Edison** Con Edison: Energy Star	**National Grid** National Grid: Energy Savings Programs	**NYSEG RG&E** NYSEG: Efficiency Resources RG&E: Efficiency Resources	**O&R** O&R: Energy Efficiency Rebates
Energy Storage	**Central Hudson** Central Hudson: Projects	**Con Edison** Con Edison: Energy Storage	**National Grid** National Grid: Battery Programs	**NYSEG RG&E** Bulk Energy Storage – NYSEG Bulk Energy Storage - RGE Agreement	**O&R** O&R Private Generation Tariffs
EV Integration	**Joint Utilities** Joint Utilities: EV Programs Joint Utilities: Approved Contractor List with New Filter Capabilities				
	Central Hudson Central Hudson: EV Homepage	**Con Edison** Con Edison: Electric Vehicles	**National Grid** National Grid: Upstate NY Electric Vehicles Hub	**NYSEG RG&E** NYSEG: Electric Vehicles RG&E: Electric Vehicles	**O&R** O&R Electric Vehicles Information O&R Electric Vehicle Guest Drive Event Video
Hosting Capacity	**Joint Utilities** JU Utility Specific Hosting Capacity				
	Central Hudson Central Hudson: Hosting Capacity Maps	**Con Edison** Con Edison: Hosting Capacity	**National Grid** National Grid: System Data Portal	**NYSEG RG&E** NYSEG/RG&E Hosting Capacity Map	**O&R** O&R Hosting Capacity and System Data
NWAs	**Joint Utilities** Joint Utilities: Utility-Specific NWA Opportunities				

	Central Hudson	Con Edison	National Grid	NYSEG RG&E	O&R
	Central Hudson: NWAs	Con Edison: Non-Wires Solutions	National Grid: NWA	NYSEG - Non-Wires Alternatives RG&E - Non-Wires Alternatives	O&R NWA Opportunities Non-Wires Alternatives Opportunities Portal
Progressing the DSP	**Joint Utilities** Joint Utilities: Utility DSIPs Joint Utilities: Capital Investment Plans Joint Utilities: Electric Reliability Reports				