****

**Wholesale Markets Project Plan**

**Closed Market Design Projects**

**© ISO New England Inc.**

**June 2018**

**ISO-NE PUBLIC**

# Preface

ISO New England publishes the *Wholesale Markets Project Plan* (WMPP) on a biannual basis to communicate changes and advancements on the scope and status of key market initiatives and to identify new efforts to ensure an efficient and reliable electricity system in New England. The WMPP is available on ISO New England’s website (<http://www.iso-ne.com>). This document, the *Wholesale Markets Project Plan: Closed Market Design Projects*, includes information on closed WMPP projects.

# Contents

[Preface i](#_Toc453760796)

[Closed Market Design Projects iii](#_Toc453760797)

# Closed Market Design Projects

The ISO has closed the following projects, either by modifying the market design and tariff or by determining that no further action is required at this time. Market design projects are moved to this document when the effective date has passed and the projects have been implemented. Market design projects that did not result in near-term design changes are also shown in this section. The ISO maintains a historical repository of Federal Energy Regulatory Commission (FERC) by month and year located at <http://www.iso-ne.com/participate/filings-orders>.

**Summary of Completed Market Design Projects
(Listed by Estimated Earliest Effective Date)**

| **Project ID** | **Market Design Project** | **Estimated Earliest Effective Date** | **Docket No. (Filing Date)** | **Design Status** |
| --- | --- | --- | --- | --- |
| ― | Financial Transmission Right Auction Enhancements | January 2012 | ER11-3568-000(May 13, 2011) | Complete |
| ― | Reopen Regulation Market Pilot | February 2012 | ER12-505-000(December 1, 2011) | Complete |
| ― | Load Reconstitution | March 2012 | ER10-1653-000(June 30, 2010) | Complete |
| ― | FCM Design Reforms Extension | April 2012 | ER12-953-000(January 31, 2012) | Complete |
| ― | Start-Up and No-Load Reoffer Changes | April 2012 | N/A | Complete |
| ― | Virtual Transaction Submission Limits | April 2012 | N/A | Complete |
| ― | NCPC: Weekly Posturing Rules | May 2012 | ER12-1809-000(May 17, 2012) | Complete |
| ― | NCPC: Weekly Posturing Rules Compliance | May 2012 | ER12-1809-001ER12-1809-002(July 30, 2012) | Complete |
| ― | End-Use Customer Aggregation (Order 745 Compliance) | June 2012 | ER11-4336-005(March 26, 2012) | Complete |
| ― | FCA Informational Publishing | June 2012 | ER12-1455-000(April 6, 2012) | Complete |
| ― | FCA Informational Publishing Compliance | June 2012 | ER12-1455-001(July 2, 2012) | Complete |
| ― | FCM Capacity Transfer Rights (CTRs) | June 2012 | ER12-1234-000(March 9, 2012) | Complete |
| ― | FCM Demand-Resource Capacity Auditing | June 2012 | ER12-1389-000(March 29, 2012) | Complete |
| ― | FCM Demand-Resource Performance Incentives | June 2012 | ER12-1392-000(March 29, 2012) | Complete |
| ― | FCM Net Regional Clearing Price (NRCP)  | June 2012 | ER12-1325-000(March 23, 2012) | Complete |
| ― | FCM Supplemental Availability Bilateral Transactions | June 2012 | ER12-1382-000(March 29, 2012) | Complete |
| ― | Price-Responsive Demand: Transition Period Changes | June 2012 | ER12-1550-000(April 1, 2012) | Complete |
| ― | System TMOR Reserve-Constraint Penalty Factor Prices  | June 2012 | ER12-1314-000(March 22, 2012) | Complete |
| ― | Electronic Data Reporting (Order 760) | August 2012 | ER12-2228-000(July 11, 2012) | Complete |
| ― | FCM Rejected Delist Bid Follow-Up Actions | August 2012 | ER12-1914-000(June 1, 2012) | Complete |
| ― | FCM Rejected Delist Bid Follow-Up Actions Compliance | August 2012 | ER12-1914-001(August 30, 2012) | Complete |
| ― | FCM Partial Nonprice Retirement | October 2012 | ER12-2393-000(August 3, 2012) | Complete |
| ― | FCM Resource Termination | November 13, 2012 | ER12-2625-000(September 14, 2012) | Complete |
| ― | FCA #7 | November 2012 | ER12-2697-000(September 27, 2012) | Complete |
| ― | FRM Threshold Price Calculation Frequency | November 2012 | ER12-2485-000(August 20, 2012) | Complete |
| ― | Financial Assurance Bilateral Transaction Cure Period | January 2013 | ER12-2575-000 (September 4, 2012)  | Complete |
| ― | Central Counterparty (Order 741) | January 2013 | ER12-1651-000(April 30, 2012) | Complete |
| 1 | Gas Pipeline Information Sharing | January 2013 | N/A | Complete |
| 13 | Financial Assurance and Bilateral Transactions | Phase 1: January 2013Phase 2: N/A | ER13-270-000(November 1, 2012) | CompleteNo action taken |
| ― | FCM Static Delist Bids | February 2013 | ER13-612-000(December 21, 2012) | Complete |
| 12 | FCM Redesign  | February 2013 | ER12-953-001(December 3, 2012) | Complete |
| 2 | Forward Reserve Market TMNSR Procurement  | March 2013 | ER13-465-000(November 27, 2012) | Complete |
| 50 | Wind Forecasting and Dispatch | Q2 2013 | N/A | Merged with other project |
| 11 | FCM Reconfiguration Auction and Capacity Supply Obligation (CSO) Bilateral Transaction Enhancements | April 2013 | ER13-585-000ER13-585-001(December 19, 2012) | Complete |
| 4 | FCM Demand-Asset Auditing | May 1, 2013 | ER13-1010-000(March 1, 2013) | Complete |
| ― | Off-line Reserve Capability Determination  | June 2013 | ER13-323-000(November 6, 2012) | Complete |
| 5 | Day-Ahead Energy Market Schedule  | June 2013 | ER13-895-000(February 7, 2013) | Complete |
| 6 | Obsolete Language Review | June 15, 2013 | ER13-1149-000(March 22, 2013) | Complete |
| 47 | Reliability Commitment Cost Recovery | June 25, 2013 | EL13-72-000(August 13, 2013)Er13-2149-000(August 20, 2013) | Complete |
| 3 | Regulation Market Opportunity Cost | July 2013 | ER13-1259-000(April 11. 2013) | Complete |
| 22 | PRD and Net Supply | August 21, 2013 | ER13-1742-000(June 21, 2013) | Complete |
| 20 | Price-Responsive Demand: Full Integration Capacity Market Changes | August 21, 2013 | ER13-1742-000(June 21, 2013) | Complete |
| 7 | Generation Capacity Auditing  | Phase 1: December 2012Phase 2: September 2013 | N/AER13-323-000(November 6, 2012) | Complete |
| 51 | Winter 2013/2014 Reliability Solutions Winter 2013/2014 Reliability Solutions Compliance | August 27, 2013September 6, 2013September 6, 2013 | ER13-1851-000(June 28, 2013)ER13-1851-001(August 9, 2013)ER13-1851-000(October 15, 2013) | CompleteComplete |
| 14 | Forward Capacity Auction #8Carry-Forward and Administrative PricingObjective Function | N/ASeptember 2, 2013 | N/AER13-1880-000(July 1, 2013) | No action takenComplete |
| 17 | Import Capacity Resource Qualification Documentation | September 23, 2013 | N/A | Complete |
| 16 | Forward Reserve Market (FRM) Incentives | October 1, 2013 | ER13-1733-000(June 20, 2013) | Complete |
| 25 | TMOR RCPF & Replacement Reserve | October 1, 2013 | ER13-1736-000(June 20, 2013) | Complete |
| 37 | FCM Shortage-Event Triggers | October 4, 2013 | ER13-2313-000(September 4, 2013) | Complete |
| 24 | Tie-Line Name Clean-Up | October 6, 2013 | ER13-2113-000(August 6, 2013) | Complete |
| 43 | Net Metered Generator Auditing | October 7, 2013 | ER13-2110-000(August 5, 2013) | Complete |
| 60 | Non-Commercial Resource Treatment | 2014 | ER14-2440-00(July 16, 2014) | Complete |
| 57 | Gas Pipeline Information Sharing | January 11, 2014 | ER14-970-000(January 10, 2014) | Complete |
| 40 | NCPC Local Second-Contingency Protection Resource (LSCPR) Cost Allocation | January 23, 2014 | ER14-584-000(December 9, 2013) | Complete |
| 10 | FCM Estimated Capacity Requirement | March 1, 2014 | N/A | Complete |
| 38 | Fuel Switching: Use of Reference Level as the Supply Offer  | March 1, 2014 | ER14-707-000(December 20, 2013) | Complete |
| 26 | Capacity Zone Modeling | April 28, 2014 | ER12-953-004(January 31, 2014) | Complete |
| 35 | FCM Performance Incentives | June 2014 | ER14-2419-000ER14-2419-001(January 17, 2014) | Complete |
| 28 | Demand-Response: Asset Auditing and FCM Financial Assurance | June 1, 2014 | ER14-581-000(December 9, 2013) | Complete |
| 29 | Demand-Response Baseline and Outages | June 1, 2014 | ER14-727-000(December 20, 2013)ER14-1659-000(April 4, 2014)ER14-727-001(May 1, 2014) | Complete |
| 44 | Nonprice Retirement Request Timeline | June 9, 2014 | ER14-1693-000(April 9, 2014) | Complete |
| 66 | Dual-Fuel Resource Auditing | September 9, 2014 | ER14-2407-000(July 11, 2014) | Complete |
| 65 | Winter Reliability Program  | September 9, 2014 |  | Complete |
| 30 | Energy Market Offer Flexibility  | December 3, 2014 | ER13-1877-000(July 1, 2013) | Complete |
| 31 | Energy Market Offer Flexibility: Conforming Rules | December 3, 2014 | ER14-2376-000(July 8, 2014) | Complete |
| 76 | Energy Market Offer Flexibility: IMM-Related Conforming II | December 3, 2014 | ER14-2686-000(August 22, 2014) | Complete |
| 77 | Energy Market Offer Flexibility NCPC Clarifications | December 3, 2014 | ER14-2929-000(September 23, 2014) | Complete |
| 32 | Energy Market Offer Flexibility: Self-Funding Tariff | December 3, 2014 | ER14-2929-000(September 23, 2014) | Complete |
| 70 | Ex-Post Mitigation of Dual-Fuel Resources | December 3, 2014 | ER14-2407-001(July 11, 2014) | Complete |
| simple_yellowdots41 | NCPC Payments | December 3, 2014 | ER14-1147-000(January 24, 2014) | Complete |
| 42 | NCPC Payments: Appendix A | December 3, 2014 | ER14-1147-000(January 24, 2014) | Complete |
| 45 | Real-Time Reserve and Pumped Storage | December 3, 2014 |  | Complete |
| 62 | Capacity Zone Modeling: Conforming Rules | Q4 2014 | ER15-195-000(October 27, 2014) | Complete |
| 73 | FCM Administrative Clarifications | January 30, 2015 | ER15-369-000(November 10, 2014)ER15-369-000(December 31, 2014) | Complete |
| 56 | FCM Sloped Demand Curve: System Curve | FCA #9(February 2015) | ER14-1639-000(April 1, 2014)ER14-1639-002(July 11, 2014) | Complete |
| 34 | FCM Noncommercial Capacity Financial Assurance | February 2015 | ER14-525-000(December 4, 2013)ER15-369-001(November 10, 2014) | Complete |
| 67 | Elective Transmission Upgrade | February 16, 2015 | ER15-1050-000(February 13, 2015) | Complete |
| 88 | Offer Review Trigger Price (ORTP) Exemptions for Distributed Renewable Technology Resources | February 21, 2015 | ER15-716-000(December 23, 2014) | Complete |
| 74 | Regulation Enhancements for Storage Management | March 31, 2015 | ER14-2918-000(September 22, 2014) | Complete |
| 46 | Regulation Market (Order 755) Compliance | March 31, 2015 | ER12-1643-003(August 5, 2013) | Complete |
| 63 | FCM Sloped Demand Curve: Local Curves: FCA 10 (Market Monitoring-Related Capacity Market Changes) | June 1, 2015 | ER15-1650-000(June 30, 2015) | Complete |
| 80 | FCA Qualification Enhancements | Q2 2015 |  | Merged with other project |
| 93 | Ownership Share Change Timing  | August 7, 2015 | Manuals complete | Complete |
| 81 | Winter Reliability Program: Winter Periods Prior to June 1, 2018 | September 14, 2015 | ER15-2208-002(December 23, 2015) | Complete |
| 64 | FCM Sloped Demand Curve: Reconfiguration Auctions | October 12, 2015 | ER15-2404-000(October 7, 2015) | Complete |
| 8 | Coordinated Transaction Scheduling | Q4 2015 | ER12-1155-000(February 13, 2015) | Phase 1 complete |
| 92 | Reactive Capability Auditing | December 1, 2015 | ER15-2628-000(November 12, 2015) | Complete |
| 27 | CTS: Self-Funding Tariff | December 15, 2015 | ER15-2641-000(November 9, 2015) | Complete |
| 83 | CTS: Conforming Changes | December 15, 2015 | ER15-2641-000(November 9, 2015) | Complete |
| 94 | Baseline Method Modifications | December 31, 2015 | ER16-167-000(December 23, 2015) | Complete |
| 96 | Price Responsive Demand: Implementation Delay | December 31, 2015 | ER16-167-000ER16-167-001(December 23, 2015) | Complete |
| 68 | FCM Sloped Demand Curve: Conforming Changes | 2016 |  | Merged with other project |
| 95 | NCPC Modifications | February 1, 2016 | ER16-250-000(December 23, 2015) | Complete |
| 97 | Resource Retirement Reforms | March 1, 2016 | ER16-551-000ER16-551-001 ER16-551-002(April 12, 2016) | Complete |
| 50 | Do Not Exceed Real-Time Dispatch | May 25, 2016 | ER15-1509-000ER16-870-000(July 23, 2015) | Complete |
| 86 | FRM Modifications: Offer Cap | June 1, 2016 | ER16-921-000(March 25, 2016) | Complete |
| 61 | Simultaneous RTDR and RTEG Audit | June 1, 2016 | ER16-167-001(December 23, 2015) | Complete |
| 86 | FRM Modifications: Heat Rate | June 15, 2016 | ER16-1296-000(May 6, 2016) | Complete |
| 98 | Zonal Demand Curves | June 15, 2016 | ER16-1434-000(April 15,2016) | Complete |
| 101 | Dual-Fuel Auditing NCPC Fixes | November 1, 2016 | ER16-2529-000(September 1, 2016) | Complete |
| 84 | Resource Dispatchability Requirements | December 12, 2016  | ER17-68-000ER17-68-001 (December 9, 2016) | Complete |
| 75 | FCA Qualification Provisions  | December 27, 2016 | ER16-2126-001 (December 6, 2016) | Complete  |
| 105 | Natural Gas Index Changes | January 10, 2017 | ER17-337-000 (January 9, 2017) | Complete |
| 110 | Deletion of Active Demand Resource Tariff Provisions | Part 1: February 24, 2017Part 2: June 1, 2018 | ER17-925-001(March 15, 2017) | Complete |
| 67/75/97 | Manual M-20 Conforming Changes | March 1, 2017 | Manual Complete | Complete |
| 48 | Subhourly Real-Time Settlement | March 1, 2017 | ER16-1838-000(June 2, 2016) | Complete |
| 106 | NCPC Modifications for Sub-Hourly Settlement | March 1, 2017 | ER17-680-000ER17-680-001(February 23, 2017) | Complete |
| 100 | CONE Recalculation and ORTP Updates | March 15, 2017 | ER17-795-000 (January 13, 2017) | Complete |
| 55 | DARD Pump Intertemporal Parameters | March 31, 2017 | ER16-954-000ER16-954-001(March 22, 2016) | Complete |
| 85 | Fast-Start Resource Pricing | March 31, 2017 | ER15-2716-000(October 19, 2015) | Complete |
| 84 | Resource Dispatchability Requirements: Conforming Manual M-11 Changes | May 5, 2017 | Manual Complete | Complete |
| 114 | Capping Adjusted Energy Offers For Use In Fast Start Pricing | July 3, 2017 | ER17-1542-000(June 30, 2017) | Complete |
| 113 | Coordination Agreement Clean-up | August 1, 2017 | ER17-1625-000 (June 16, 2017) | Complete |
| 115 | Enable Subhourly Revenue Quality Metering Submittals | August 1, 2017 | ER17-1706-000 (July 7, 2017) | Complete |
| 108 | Clarifying Revisions to Force Majeure | November 21, 2017 | ER17-2533-000(October 24, 2017) | Complete |
| 107 | Order 825 Compliance: Settlement Interval Requirements | December 1, 2017 | ER17-774-000 (February 24, 2017) | Complete |
| 118 | NCPC Modifications for Ramp Constrained Resources | December 1, 2017 | ER17-2569-000 (November 2, 2017) | Complete |
| 120 | Small Generator Modeling Options | December 20, 2017 | ER18-122-000(November 22, 2017) | Complete |
| 69 | [PRD Conforming Changes: Self-Funding Tariff](https://www.iso-ne.com/committees/key-projects/price-responsive-demand) | January 1, 2018 | ER18-77-000 (December 6, 2017) | Complete |
| 35 | FCM Performance Incentives  | June 1, 2018 | ER14-1050-000ER14-1050-001EL14-52-000(January 17, 2014) | Phase 1 Complete |
| 21 | [Price-Responsive Demand: Energy Market (Order 745)](http://www.iso-ne.com/committees/key-projects/price-responsive-demand) | June 1, 2018 | ER11-4336-000ER11-4336-001 ER11-4336-002(January 19, 2012) | Complete |
| 69 | [Price Responsive Demand (PRD): Conforming Changes](https://www.iso-ne.com/committees/key-projects/price-responsive-demand) | June 1, 2018 | ER17-2164-000 (October 17, 2017) | Complete |
| 111 | FERC Order 831: Offer Caps in Markets Operated by RTOs and ISOs | October 1, 2019 | ER17-1565-000 (November 9, 2017) | Complete |
| 59 | Regulation Market: Improved Resource Modeling and Automatic Generation Control (AGC) Dispatch Coordination | N/A | ER14-584-000(March 20, 2014) | No action taken |
| 71 | FCM Peak Energy Rent Modifications (CCP 5-8) | N/A |  | No action taken |
| 49 | Treatment of Resources Retained for Reliability | N/A |  | No action taken at this time |
| 33 | FCM Cost Allocation and Load Reconstitution | N/A |  | No action taken |
| 53 | Monthly Forward Reserve Market Auction | N/A | N/A | No action taken |
| 9 | FCM Demand-Resource Asset-Transfer Rules | N/A | N/A | No action taken |
| 52 | Winter 2014/2015 Solution | N/A | N/A | No action taken |
| 63 | FCM Sloped Demand Curve: Local Curve | N/A | N/A | No action taken |
| 39 | NCPC Cost Allocation | N/A | N/A | Phase 1no action taken |
| 15 | Financial Transmission Rights Auction Enhancement Language Restructuring | N/A | N/A | No Action Taken |
| 54 | Submission of FTRs for Clearing | N/A | N/A | No Action Taken |
| 99 | Uncleared ARA3 Demand Bids | N/A | N/A | No Action Taken |
| ― | Regulation Market (Order 755) | N/A | ER12-1643-000(April 30, 2012) | Merged with other project |
| ― | Day-Ahead Reserve Markets Enhancements Assessment | N/A | N/A | No action taken at this time |
| ― | FCA Format Assessment | N/A | N/A | No action taken |
| ― | FCM Demand-Resource Reliability-Only Product | N/A | N/A | No action taken |
| ― | FCM Peak Energy Rent (PER) Review | N/A | N/A | No action taken |
| ― | Negative Incremental Energy Offers | N/A | N/A | Merged with other project |
| ― | Resource Modifications and Interconnection Terms  | N/A | N/A | No action taken |
| ― | Review of Defined Terms for Offers and Parameters in Energy Markets | N/A | N/A | Merged with other project |