

Southern Intertie Study Process

BPA Transmission Business Practice

Version 2
11/6/2024

Southern Intertie Study Process

Version 2

This business practice describes the requirements and processes for conducting studies to increase capacity on the Southern Intertie.

For information on how BPA performs studies for LTF TSRs impacting the BPA Network refer to the TSR Study and Expansion Process (TSEP) Business Practice.

BPA Policy References

- [Open Access Transmission Tariff \(OATT\)](#): 13.5; 15.2; 15.4(a); 17.5; 19.1; 21.1; 21.2

For more information, visit the [BPA Transmission Business Practices webpage](#) or submit questions to techforum@bpa.gov.

Table of Contents

A. Overview	1
B. Customer Requested Study Process.....	2
C. BPA Initiated Study Process.....	3

A. Overview

1. The Southern Intertie is comprised of the Northwest AC Intertie (NWACI) and the Pacific DC Intertie (PDCI).
 - a. The NWACI and PDCI are included in the Western Electricity Coordinating Council (WECC) path rating catalogue.
2. Studies to increase capacity on the Southern Intertie are performed at either BPA's discretion or upon Customer request.
3. The studies performed by BPA will be a combination of the following as necessary:
 - a. System Impact Studies.
 - b. System Facilities Studies.
 - c. Cluster Studies.
 - d. WECC path rating increase studies.
 - i. WECC path rating increase studies are required for paths included in the WECC path rating catalogue.

- ii. Transmission Provider(s) at both ends of the intertie and any impacted capacity owners and facility owners must agree to participate in the WECC study process.
 - iii. The Customer will be required to advance fund the WECC study process as well as coordinate any other required agreements to maintain a valid completed application.
- 4. BPA may perform WECC studies at the same time as the System Facilities Study.
- 5. These studies will take a minimum of 12 to 18 months.
- 6. BPA will use due diligence to perform studies per the OATT prescribed timelines, however, studies must be coordinated with all impacted third party Transmission Providers and this may result in delays that are outside of BPA's control.

B. Customer Requested Study Process

1. Customers may request a study of any of the Customer's LTF TSR(s) in STUDY status on OASIS which impact the Southern Intertie.
2. A formal request stating the AREF(s) of the TSR(s) to be studied must be submitted via email to the Customer's assigned Transmission Account Executive.
3. Upon receipt of the Customer's formal request, BPA will:
 - a. Post a notice on OASIS that a study request has been submitted and a Cluster Study on the Southern Intertie may be performed; and
 - b. Tender a study agreement to the Customer requesting a study (requesting Customer) within 30 Business Days. This study agreement will define the requesting Customer's obligations to perform third party coordination with all impacted Transmission Providers and capacity or facility owners.
 - i. If the requesting Customer fails to execute and fund the study agreement within 15 Calendar Days, including provision of a [Data Exhibit](#) if BPA requests additional information, and meet the third party coordination requirements defined in the study agreement, if applicable, within 60 Calendar Days, their TSR(s) will be DECLINED and receive no further consideration.
 - ii. If the requesting Customer executes and funds the study agreement, and meets the third party coordination requirements, their TSR(s) will be considered eligible for an intertie study.
4. Once the requesting Customer has met the third party coordination requirements and appropriate third parties have agreed to participate in the study, BPA will tender a study agreement to the following Customers with LTF TSRs in STUDY status impacting the same portion of the Southern Intertie (either the NWACI or the PDCI):
 - a. LTF TSRs submitted prior to that of the requesting Customer; and
 - b. LTF TSRs submitted after that of the requesting Customer which BPA determines on a case-by-case basis will ensure the most efficient use of study resources.

- i. Customers included in the study (affected Customers) will not be obligated to perform third party coordination, as the requesting Customer will be required to conduct the necessary coordination.
 - ii. Affected Customers will either execute and fund the study agreement, including provision of a Data Exhibit if BPA requests additional information, or their TSR(s) will be DECLINED and receive no further consideration.
5. At the conclusion of a study:
 - a. If the requesting Customer elects not to proceed to the next phase, the study effort shall be terminated, the requesting Customer's TSR(s) will be DECLINED and receive no further consideration, and any affected Customers will retain their queue position; or
 - b. If the requesting Customer executes the next phase agreement, all affected Customers will receive an agreement as well. If the study agreement is not executed by an affected Customer, their TSR(s) will be DECLINED and receive no further consideration.

C. BPA Initiated Study Process

1. If a study (described above) will be performed at BPA's discretion, BPA will post a notice on OASIS and tender a study agreement to Customers with LTF TSRs in STUDY status impacting the applicable portion of the Southern Intertie (NWACI or PDCI).
 - a. Affected Customers will not be obligated to perform third party coordination, as BPA will conduct the necessary coordination.
 - b. Affected Customers will either execute and fund the study agreement, including provision of a Data Exhibit if BPA requests additional information, or their TSR(s) will be DECLINED and receive no further consideration.