

July 2, 1997

The Honorable Lois D. Cashell
Secretary
Federal Energy Regulatory Commission
888 First Street, N.E.
Washington, D.C. 20426

Open Access Same-time Information System and Standards of Conduct, Docket No. RM95-9-003
Notice of Technical Conference and Clarification of Procedures for Developing Scheduling Requirements
(June 25, 1997)

Dear Madam Secretary:

Enclosed is a proposed list of speakers and outlines of presentations to be made jointly by the North American Electric Reliability Council (NERC), the OASIS How Working Group (facilitated by the Electric Power Research Institute and NERC), and the Commercial Practices Working Group (facilitated by NERC). The topics have been organized into three panels according to the three subject areas identified by the Commission in its Notice of June 25, 1997.

The first two panels are self-explanatory reports on the status of OASIS and the OASIS How Working Group's proposed revisions to the Phase 1A Standards and Communications Protocols. The third panel looks at the future evolution of OASIS and is more exploratory in nature. The third panel raises a number of key issues that need to be addressed in the Phase 2 report requested by the Commission. We will be posing these issues at the Technical Conference more as questions than as conclusions or tangible proposals.

We take this opportunity to also express frustration at the sudden and unexpected announcement of this Technical Conference. The short notice does not allow sufficient time to coordinate presentations that must represent the views of consensus-based groups. The date is in conflict with a Commercial Practices Working Group meeting that has been scheduled for two months and has also disrupted schedules of the OASIS How Working Group in preparing its report to the Commission.

Sincerely,

Enclosures

**OASIS Progress Report to the
Federal Energy Regulatory Commission
July 18, 1997**

**Joint Report by the
OASIS How Working Group
Commercial Practices Working Group
North American Electric Reliability Council**

Panel 1: Status of OASIS Phase 1 Implementation

Speakers

OASIS How Working Group:	Gerry Cauley, OASIS How Working Group Facilitator, NERC
Commercial Practices Working Group:	David Nevius, CPWG Facilitator, NERC
Transmission Providers:	Steve Sumrall, Southern Company Services Robert Reed, PJM Interconnection, L.L.C. JTSIN (To Be Determined)
Affiliated Customer(s)	To Be Determined by FERC
Non-affiliated Customer(s)	To Be Determined by FERC
Value-added Information Provider(s)	To Be Determined by FERC

Outline of Presentations

- What is OASIS today?
- The consensus process and participants
- Measures of success: FERC goals, customer needs, provider needs
- Magnitude of accomplishment
 - North American-wide system supporting transmission service reservations
 - Early large scale use of public Internet for business-to-business commerce
 - Conception, design, consensus, development, testing and start-up in 18 months
- OASIS performance to date
 - Node availability and performance
 - Provider compliance with information availability requirements
 - Compliance with Standards & Communications Protocols (S&CP) document: Web GUI vs. automated query process
 - NERC OASIS testing results
 - Conduct of business “off the OASIS”
 - Getting people ready to use OASIS
 - Automating back room processes
 - Service charges for heavy users
- Phase 1 business process issues
 - OASIS points out areas of non-standard business practices
 - Diverging tariff requirements and market models
 - Diversity of transmission service product definitions and attributes
 - Supporting “next hour” reservations
 - Sliding windows of service vs. calendar offerings
 - Confirmation process and bumping priorities
 - Ancillary service procurement process
 - Development of ancillary and secondary transmission service markets
 - ATC practices
- Provider/Customer Comments
 - JTSIN providers
 - Other providers
 - Non-affiliated merchant users
 - Affiliated merchant users
 - Value-added information providers

Panel 2: Summary of How Working Group's Report

Speakers

OASIS How Working Group

Peter Hirsch, OASIS How Working Group Facilitator, EPRI
Paul Sorenson, American Electric Power

Other Interest Groups

To Be Determined by FERC

Outline of Presentations

- Interim Measures to Implement Discounting Policy in Phase 1 (by August 31, 1997)
 - Unmasking of price and identity (source/sink?)
 - Interim price negotiation procedure
 - Interim discount disclosure procedure
- OASIS Phase 1A goals
 - Respond to FERC policy changes
 - Levelize, stabilize, and improve OASIS
 - Refine and adopt business processes
 - Allow transmission and ancillary service markets to develop
 - Further automate back-end processes
 - Coordinated migration of OASIS
- OASIS Phase 1A scope related to implementing FERC policy
 - Removal of all references to masking (source/sink?)
 - Interactive price negotiation
 - Discount disclosure
 - Linking of ancillary services to transmission services to facilitate procurement
 - Affiliate flag
 - Personnel transfers
 - Exercise of discretion
 - Templates in sequence and number, graphical displays same content and processes
- Industry initiatives to improve OASIS Phase 1A
 - Standardization of product names and attributes
 - Merging of offering templates into one for simplification
 - Addition of continuation records to denote capacity/service profiles
 - Additional status options: withdrawn, retracted, annulled
 - Dynamic notification
 - Addition of alternate POD/POD to support nonfirm secondary service
 - Reorganized S&CP and made other format/protocol improvements
- Implementation plan and timetable
 - Six months from FERC approval of revised S&CP
 - Requires development, migration from existing live system, testing, training
 - Requires ongoing integration of business process guidelines (from Commercial Practices Working Group and changing regulations)

Panel 3: OASIS Phase 2

Speakers

OASIS How Working Group
North American Electric Reliability Council
Commercial Practices Working Group
Other Interest Groups

Gerry Cauley, OASIS How Working Group Facilitator, NERC
David Nevius, NERC
Paul F. Barber, Citizens Power L.L.C.
To Be Determined by FERC

Outline of Presentations

- Overview of NERC security initiatives
 - Security coordinators
 - Interregional Security Network (ISN) and NERCnet
 - ATC implementation
 - Interconnected operations (ancillary) services
 - Transmission reservation and scheduling
 - Operator certification and training accreditation
- NERC Transaction Tagging Procedure
 - Security basis for providing transaction details to operating authorities and security coordinators
 - Description of information template and interim manual process
- Options for Phase 2 OASIS
 - Integration with transaction information system for scheduling
 - One-step reservation and scheduling process for spot market (near real-time)
 - Migration toward use of private network(s)
 - Reservations for network service
 - Security enhancements
 - Fully interactive negotiations and notifications
- Options and issues for Phase 3 OASIS and beyond
 - Migration to flow-based reservations and alternative models
 - Impact of retail access
 - Emerging ISO's, power exchanges, location-based and congestion pricing, and Regional tariffs: what is the role of OASIS in these increasingly diverse market models?
- How do we proceed toward Phase 2 OASIS: organization and process
 - Development of NERC security support systems, including transaction information system
 - Development of consensus standards: What and How
 - Engaging customers in the design and development of Phase 2 OASIS
 - Phase 2 time frame: 1999?