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TRMID for Duke Energy Joint

Applies To:

*DEC ECC as a TOP**DEP ECC as a TOP*

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II. Purpose

The purpose of this document is to describe the methodology that Duke Energy Carolinas (DEC) and Duke Energy Progress (DEP) uses to determine Transmission Reliability Margin (TRM) in their respective ATC process and promote the consistent and reliable calculation, verification, preservation, and use of TRM to support analysis and system operations.

III. General Information

TRM is the amount of transmission transfer capability necessary to provide reasonable assurance that the interconnected transmission network will be secure. TRM accounts for the inherent uncertainty in system conditions and the need for operating flexibility to ensure reliable system operation as system conditions change.

The Transmission Operator (TOP) uses two separate forms of TRM that are described in this document.

- The first form is the calculated value of TRM on each individual flowgate that will be referred to hereafter as “Flowgate TRM.”
- The second form is the calculated value of TRM on each Duke Energy Carolinas’ Contract Path with other VACAR Balancing Authorities (BA) that are members of the Carolinas Reserve Sharing Group that will be referred to hereafter as “Interface TRM.”

The Flowgate TRM for each TOP is determined by the greatest impact on a flowgate due to one of the following scenarios:

- The most impactul loss of a single generator inside its TOP area or a generator located in an immediately adajacent (Tier 1) area, or
- The delivery of its reserve sharing commitment to each participating company (based on contractual obligations), or
- The simultaneous receipt of its reserve sharing commitment from each participating company (based on contractual obligations).

Tier 1 areas are below and apply to both DEC and DEP, except where indicated:

- PJM
- SCPSA
- DESC
- TVA
- Cube Hydro – Yadkin
- SOCO (For DEC only)
- SMT (for DEC only)
- DEC
- DEP

After performing the evaluations of these three scenarios, the TOP will designate each flowgate’s Flowgate TRM equal to the highest impact on that flowgate from the above scenarios.

The Interface TRM is calculated using the Carolinas Reserve Sharing Group’s current member Balancing Authority allocations.

The Flowgate TRM is used in the Available Flowgate Capability (AFC) calculations while the Interface TRM is used in the Remaining Contract Path Capability (RCPC) calculations. The same TRM values for each respective form of TRM are applied to both Firm and Non-Firm calculations.

The TOP will use the TRM calculated by neighboring Transmission Operators on honored flowgates if it is made available.

Effective Time Periods:

The TOP utilizes the TRM Allocation Methodology, as described above, for the following time periods:

- Same day and real-time
- Day-ahead and pre-schedule
- Beyond day-ahead and pre-schedule and up to at least thirteen months ahead

Identification of Components of Uncertainty Used:

As described in the above methodologies, the following components of uncertainty are used in the calculation of TRM for Interface TRM followed by the components used in the TRM for flowgates.

Flowgate TRM:

The uncertainty components used in this calculation are the variation in generation dispatch and inertial response and frequency bias. The loss of impactful generators is used to calculate the largest MW impact that the Interconnection can have on the TOP's transmission system due to the loss of a single generator. The SERC NTSG OASIS seasonal case includes planned generator maintenance outages and future generation which is planned to come online in the season being studied.

Interface TRM:

The only uncertainty components used are the reserve sharing requirements on applicable interfaces as discussed previously.

Standard Requirements:

The Transmission Operator (TOP) will make changes as necessary to the TRMID to keep it updated with the current process.

The TOP will make available its TRMID, and if requested, underlying documentation used to determine TRM, in the format used by the TOP, to any of the following who make a written request no more than 30 calendar days after receiving the request.

- Transmission Service Providers
- Reliability Coordinators
- Planning Coordinators
- Transmission Planner
- Transmission Operator

The TOP will establish TRM values in accordance with the TRMID at least once every 13 months.

The TOP will provide the TRM values to its Transmission Service Provider(s) and Transmission Planner(s) no more than seven calendar days after a TRM value is initially established or subsequently changed.

IV. Procedure

The following sections provide an overview of the Flowgate and Interface TRM calculation processes.

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A. Flowgate TRM Calculation

PowerGEM's Transmission Adequacy and Reliability Assessment (TARA) is used to calculate each Flowgate TRM for each one of the scenarios described in the Overview section. The inputs to the process are the PSS/e raw file for SERC NTSG OASIS seasonal basecase being studied, the TRM subsystem file containing the generator and area responding data, and the flowgate file containing all of the TOP's and applicable external companies' flowgates. The output of TARA Viewer (Flowgate TRM's) is uploaded into the flowgate definition file and used for the calculation of flowgate limited AFC.

TARA is used to calculate the generation shift factors for each scenario for each of the flowgates. To determine the flow impact due to the loss of a generator, the generation shift factor for each flowgate is multiplied by the capacity of that generator. For the delivery or receipt of the TOP's Carolinas Reserve Sharing commitment, the difference of the generation shift factors of the responding generators for the BAs involved is multiplied by the delivering companies' reserve sharing commitment to determine the impact on each flowgate.

Whichever scenario delivers the greatest positive impact on a flowgate, that value is the TRM allocation on that flowgate. If there is no impact or a negative impact (decrease in flow), the Flowgate TRM is set to "0."

B. Interface TRM Calculation

The TOP allocates TRM across its Contract Paths based on contractual obligations to supply and receive reserves. The Interface TRM is calculated according to the Carolinas Reserve Sharing Group Manual.

The contractual requirements for the Carolinas Reserve Sharing Group are reviewed, established, and updated annually. The TOP allocates these contractual obligations to its Contract Paths through the utilization of TRM, based on the following methodology:

- **Imports** – TRM for Contract Paths sinking into the TOP's Area from another VACAR Balancing Authority Area are set equal to the opposing Balancing Authority Area's share of the Carolinas RSG allocated reserve requirement.
 - TRM on all other (Non-Carolinas RSG Balancing Authority Areas) Contract Paths sinking into the TOP's Area are set to zero.
- **Exports** – TRM for Contract Paths sourcing from the TOP's Area to another Carolinas RSG Balancing Authority Area are set equal to the TOP's share of the Carolinas RSG allocated reserve requirement.
 - TRM on all other (non-Carolinas RSG Balancing Authority Areas) Contract Paths sourcing from the TOP's Area are set to zero.

V. Approval

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VI. Revision History

Revision	Date	Responsible Person	Description of Changes to Document
0	09/21/2022	Bryson Hollen	- Converted the procedure listed below to new template and updated TRM calculation process to reflect the new Carolinas Reserve Sharing Group <i>CSV-MOD-A01_TRMID_for_Duke_Energy_Joint</i>