Technical Conference

February 10, 2026

CASE 25-E-0764 - Proceeding on Motion of the Commission to Address New York City Reliability Needs

Safety Message and Logistics

- Dial 911 in the event of a medical emergency. Building address is 4 Irving Place, New York, NY 10003.
- In case of other emergencies, you will receive instruction from our Fire & Safety Director over the public address system.
- To enter or leave the building, you must be escorted by a Con Edison employee.
- You may take calls or meetings from the Cafeteria, and we can provide a wifi pass.
- Restrooms are accessible across the hallway.

Welcome & Objectives

- Technical Conference Purpose: Discuss NYC Reliability Needs Report, explain RFI requirements, and answer questions
- We will deliver a presentation, answer previously submitted questions, and then open the floor to Q&A
- Questions after the Technical Conference should be directed to PeakSolutions@coned.com
- We will answer questions at the end of the presentation as time permits
- Questions after the Technical Conference must be submitted by February 13 in order to be answered

Agenda

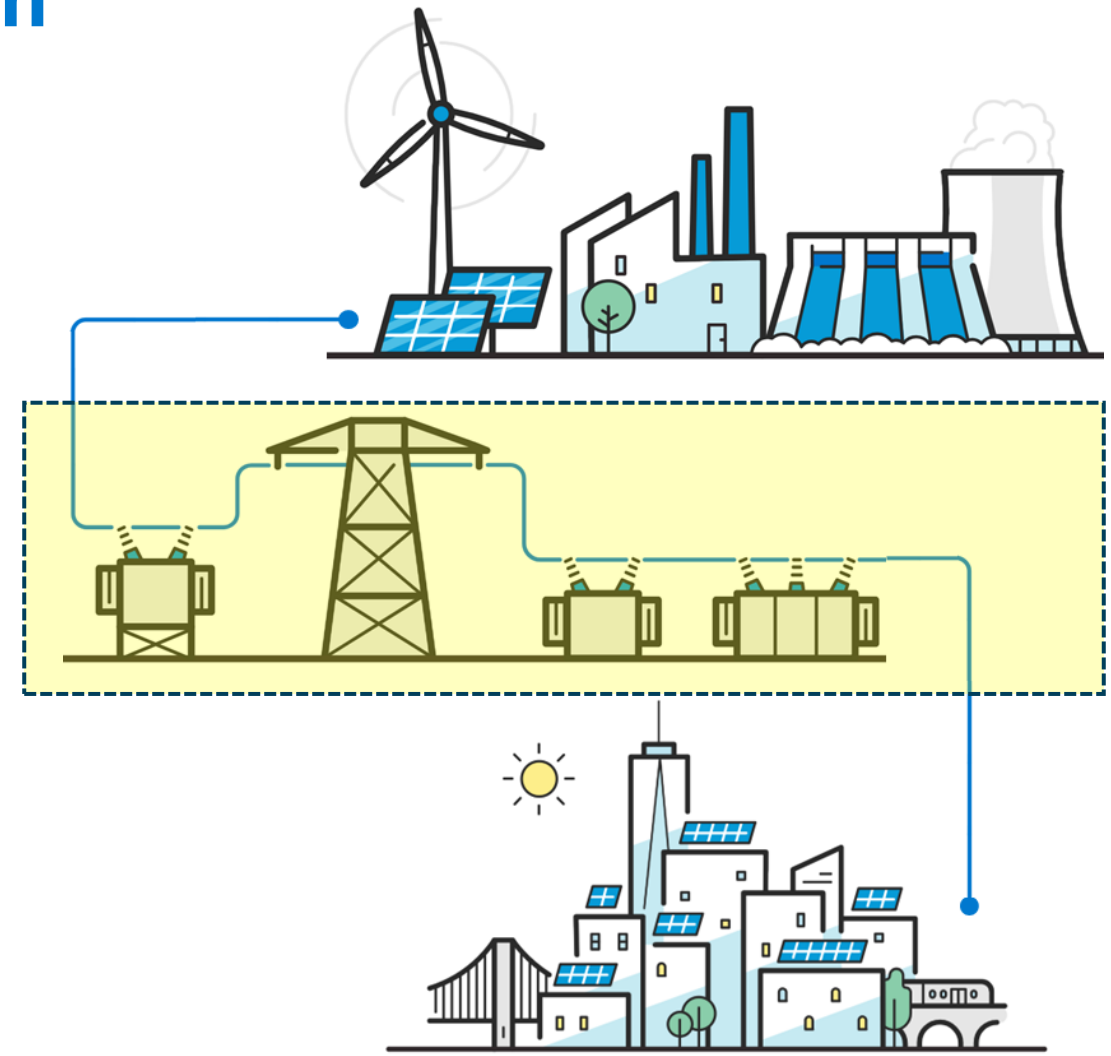
- Introduction: 10:30-10:40
- Local Transmission Plan & Needs Details: 10:40-11:00
- Open Q&A: 11:05-11:30
- RFI: 11:30-11:40
- FAQs: 11:40-11:45
- Open Q&A: 11:45-12:55
- Closing: 12:55-1:00

Background

- In December 2025, the New York Public Service Commission (PSC) directed Con Edison to develop an Initial NYC Reliability Contingency Plan (RCP)
- The RCP is being developed to address identified transmission security needs during the summer capability period – i.e., May through October
- Needs have been identified for Zone J during summer peak days beginning in 2032 and continuing to grow through 2036
- The Company will file its Initial NYC Reliability Contingency Plan June 16 with the Public Service Commission

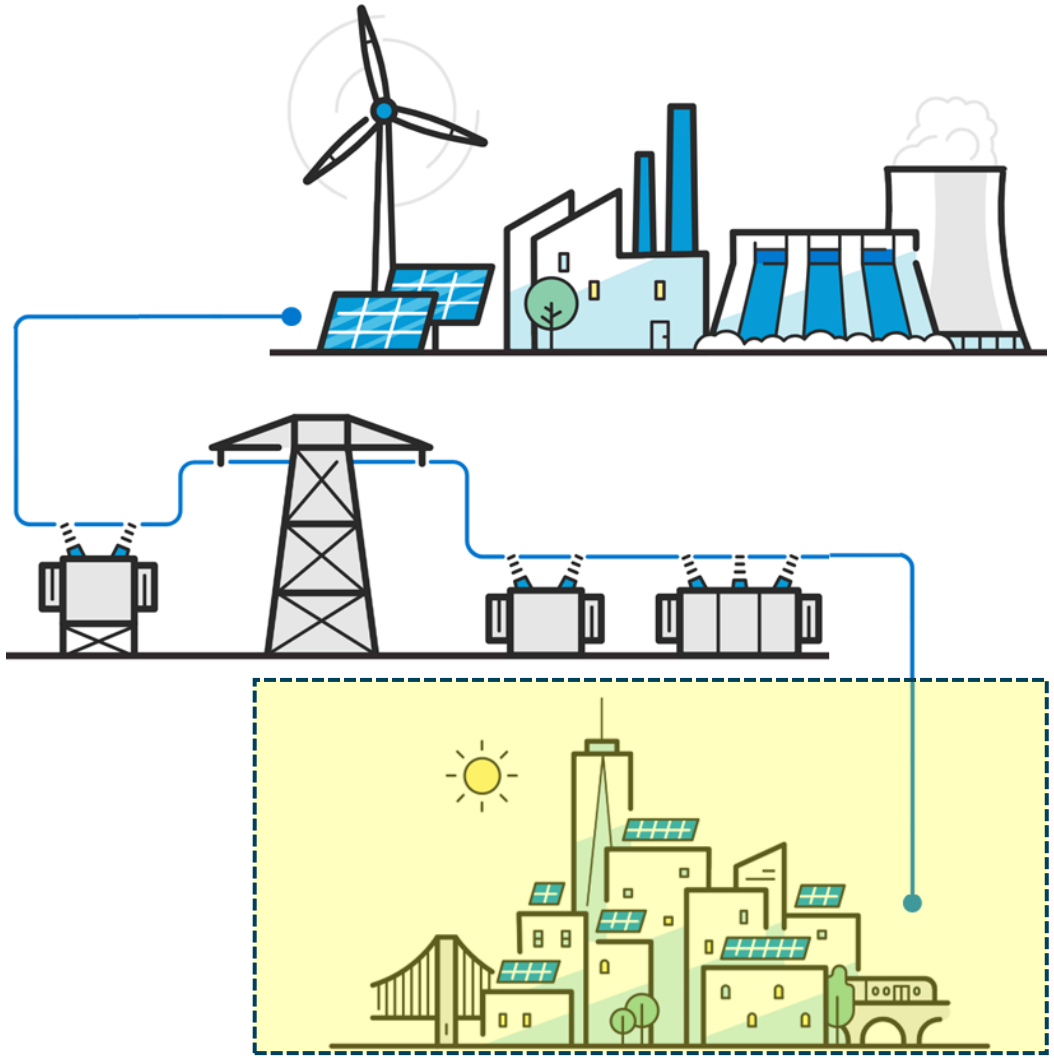
Transmission: The “Bulk” System

- **Scope:** Focuses on the high-voltage "backbone" (345kV, 138kV, etc.) that carries power over long distances from generators to load centers
- **Network Topology:** Highly interconnected (networked). Power can flow in multiple directions, meaning a failure in one area can impact the entire region or state
- **Reliability Driver:** Driven by mandatory reliability mandates. The goal is to prevent wide-scale cascading blackouts and ensure the entire system remains synchronized at 60Hz



Transmission vs. Distribution

- **Operating Voltage**
  - Transmission: High voltage (e.g., 345kV) for long-distance efficiency
  - Distribution: Lower voltage (e.g., 33kV, 27kV, 13kV) for local delivery
- **System Configuration**
  - Transmission: Networked. Power flows in multiple paths; high redundancy
  - Distribution: Power flows in one direction from a substation to the end-user customers
- **Planning Complexity**
  - Transmission: Focuses on regional stability and wide-area reliability (mandatory reliability mandates)
  - Distribution: Focuses on local equipment capacity, voltage regulation, and individual "feeder" reliability
- **Importance of Transmission Security**
  - Transmission: An event can cause a regional impact
  - Distribution: An event typically only impacts a specific neighborhood



What is the Local Transmission Plan (LTP)?

- **Mandatory Reliability Assessment:** A rolling 10-year study required to ensure the local transmission network complies with applicable continental, regional, state, and local reliability standards (e.g., NERC, NPCC, NYSRC, Con Edison Planning Criteria)
- **Contingency Mitigation:** The primary vehicle for identifying "Reliability Needs" where the system might fail to meet the N-1-1-0 standard, allowing Con Edison to schedule upgrades before a violation occurs
- **Deterministic Planning:** Focuses on "firm" solutions – permanent load reduction, new resources, and/or physical grid reinforcements - to ensure the system remains in compliance with the reliability standards

Grid Design Criteria & Reliability Standards

The Three Physical Constraints:

- **Thermal:** Prevents equipment damage by ensuring current flow does not overheat equipment
- **Voltage:** Maintains "electrical pressure" within a strict ±5% range to prevent "voltage collapse”
- **Stability:** Ensures all grid resources remain synchronized at 60Hz, allowing the system to "bounce back" from sudden events

Applicable Reliability Standards:

- Con Edison transmission system is designed to federal, regional, state and local reliability standards
- **N-1-1-0 Reliability:** A strict "double-contingency" mandate requiring the grid to withstand the loss of a major component, allow for system adjustment, and survive a *second* major failure all while maintaining 100% power delivery to customers

Local Transmission Plan – Major Assumptions

- The LTP is based on the NYISO 2025 FERC 715 Filing / 2025 Load and Capacity Data (“Gold Book”) database
  - Incorporates Con Edison’s Load Forecast
  - NYPA Small Gas Plants: Assumed an equivalent amount of generation is available
- Major Projects assumed to be in-service:
  - Y2026: 1,250 MW Champlain Hudson Power Express (CHPE)
  - Y2027: 816 MW (usable per 90% derate: 81.6 MW) Empire Wind OSW; Summer 2027
- Con Edison Transmission Projects:
  - Y2026: 4th Gowanus – Greenwood 345/138 kV PAR controlled feeder
  - Y2028: Brooklyn Clean Energy Hub 345 kV Substation
  - Y2028: Eastern Queens 138 kV Substation
  - Y2034: Sunset Park 345 kV Substation

*Propel NY PPTN Project (May 2030) is part of the database. No impact on NYC Needs.

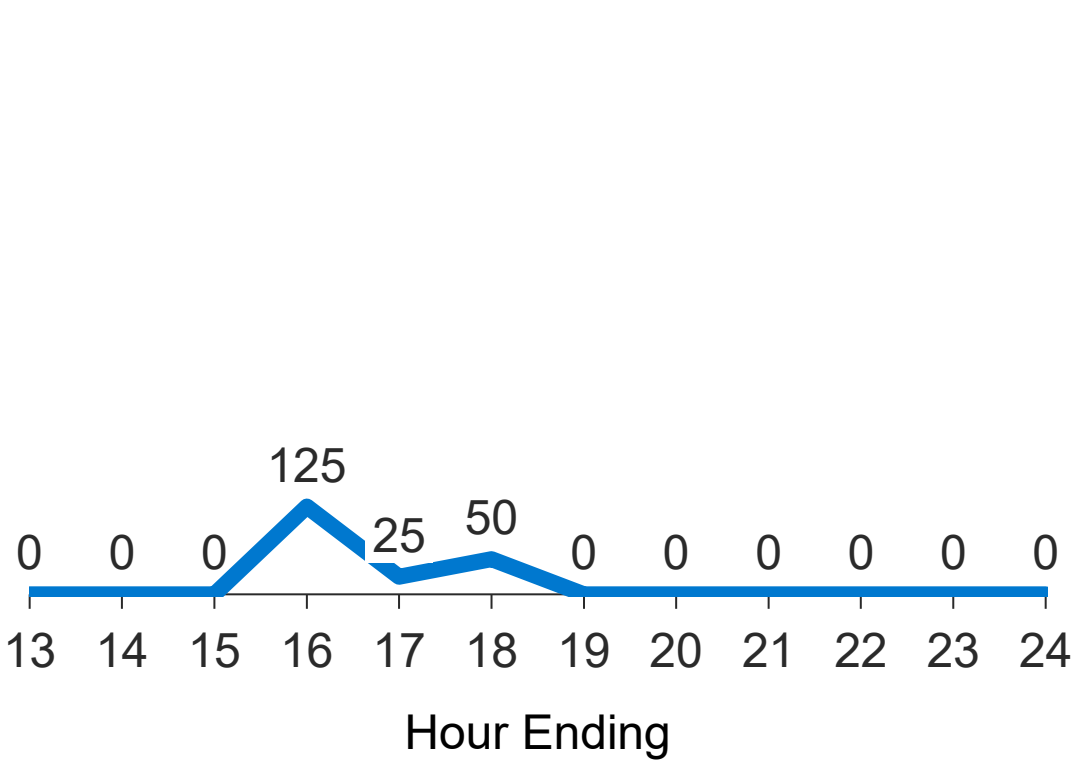
Summer Reliability Need Details

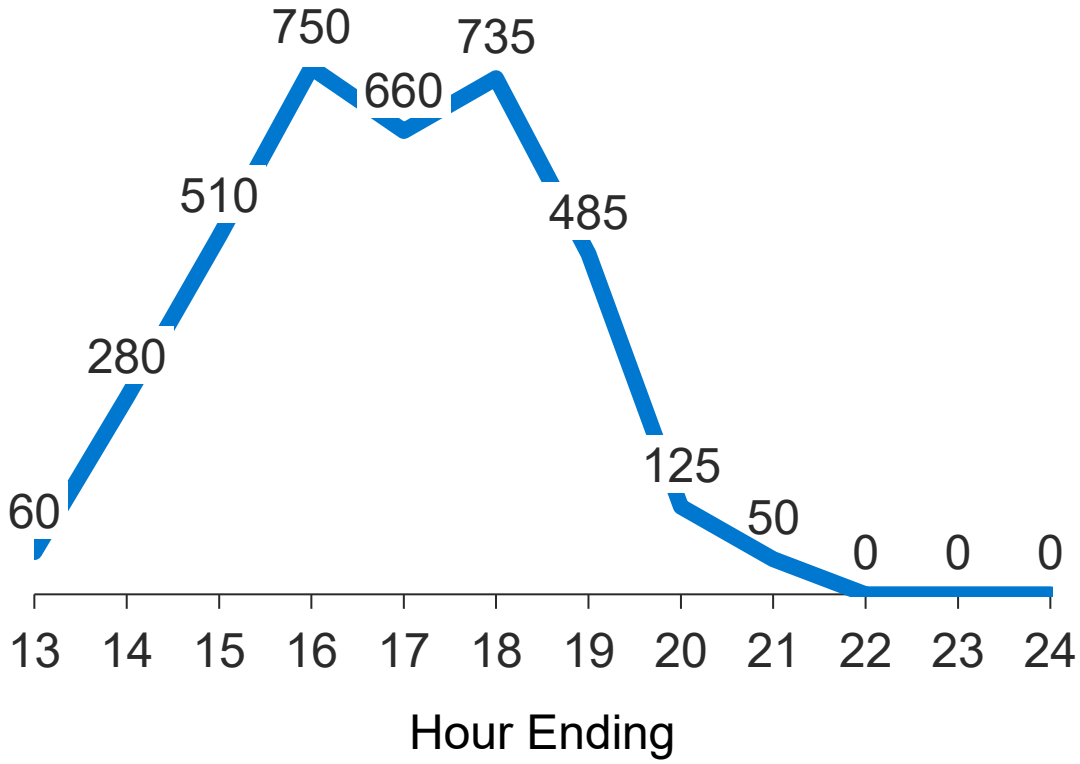
- The table at right summarizes the anticipated transmission-need years and peak-day duration needed for NYC (Zone J) during summer peak days between 2032 and 2036

	2032	2033	2034	2035	2036
Reliability Need (MW)	125	275	400	600	750
Hours Needed During Peak	3	4	5	6	9
~MWh by Hour	- - - 15:00-16:00: 125 16:00-17:00: 25 17:00-18:00: 50 - - -	- - 14:00-15:00: 100 15:00-16:00: 275 16:00-17:00: 175 17:00-18:00: 225 - - -	- - 14:00-15:00: 200 15:00-16:00: 400 16:00-17:00: 300 17:00-18:00: 375 18:00-19:00: 150 - -	- 13:00-14:00: 175 14:00-15:00: 375 15:00-16:00: 600 16:00-17:00: 525 17:00-18:00: 575 18:00-19:00: 350 - -	12:00-13:00: 75 13:00-14:00: 300 14:00-15:00: 525 15:00-16:00: 750 16:00-17:00: 675 17:00-18:00: 750 18:00-19:00: 500 19:00-20:00: 150 20:00-21:00: 50
~ Total MWH	200	775	1,425	2,600	3,775

Summer Reliability Need Details

2032 Need (MW) → **Need Grows Over Time** → **2036 Need (MW)**

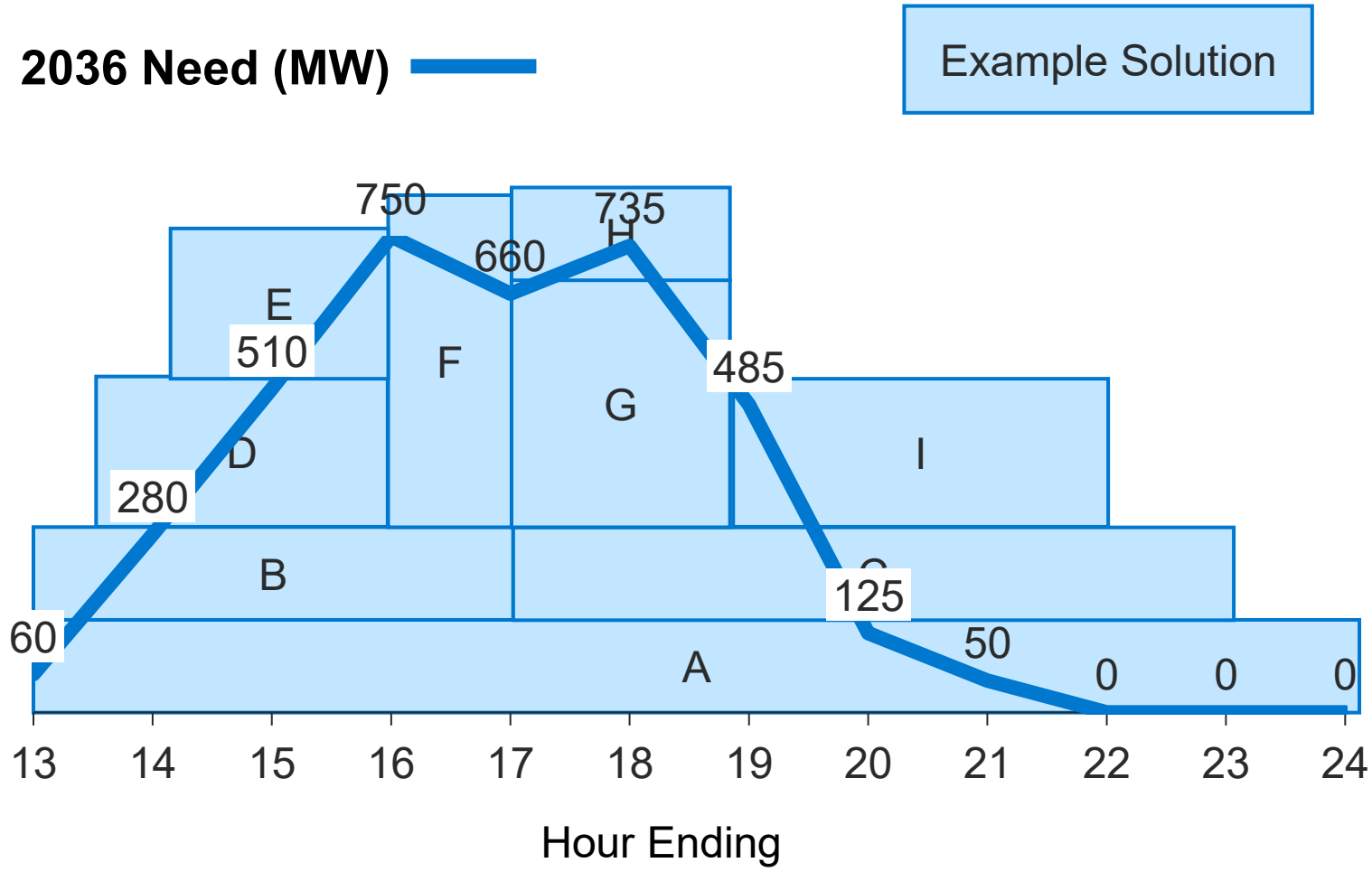




Building the NYC Reliability Contingency Plan

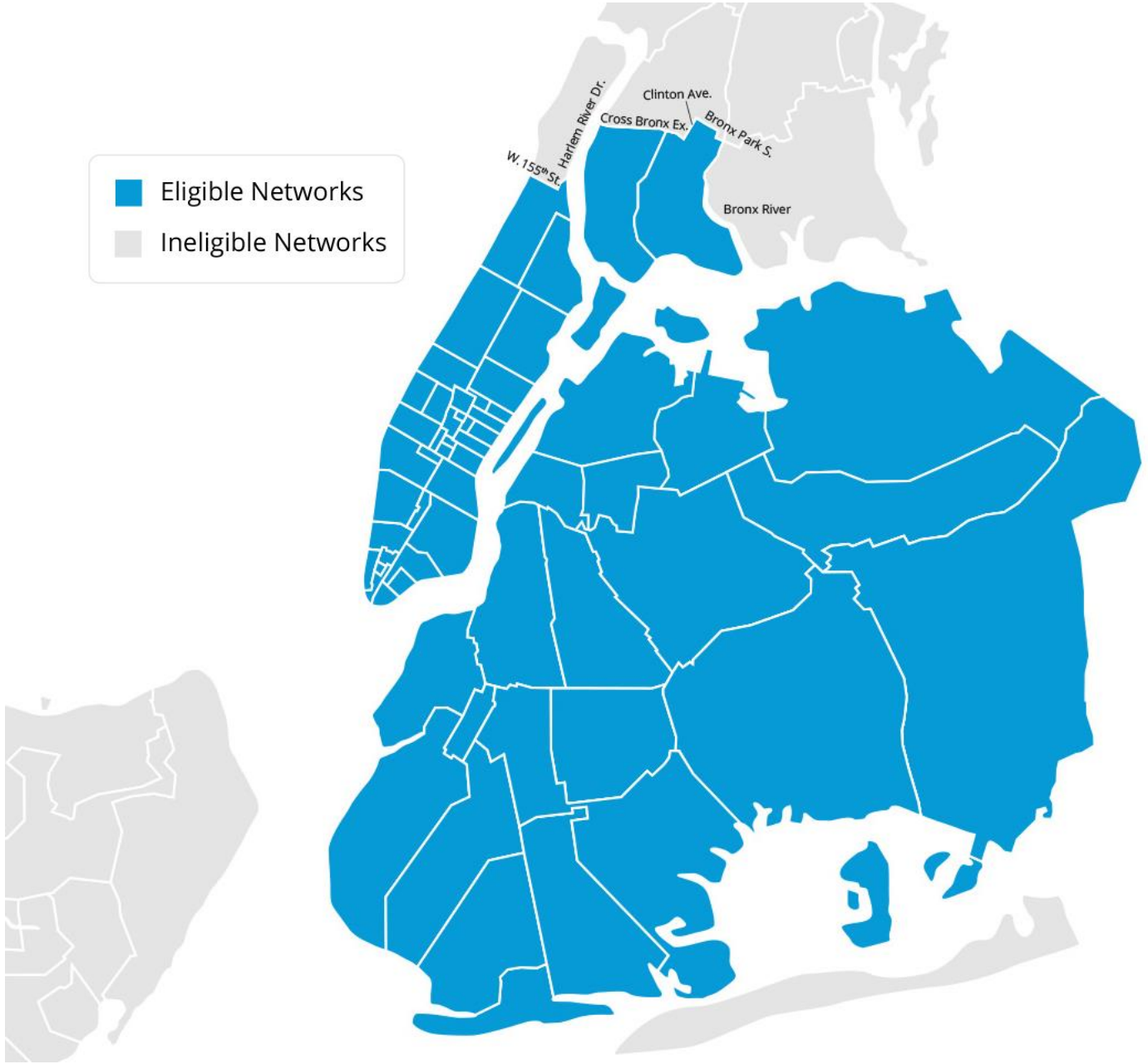
Portfolio Development

- Plan to build portfolio of solutions to address the full need
- Proposed solutions do not need to solve the entire need
- Solutions can grow and build capacity over time
- Inclusion of MWs, hours of performance, and years is critical to assess contribution to solving need



Geographic Constraints

- Transmission constraints, internal to New York City, restrict the effectiveness of solutions in the certain areas of the system
  - Load Relief and/or new resource addition would bottle existing resources



How to solve a Transmission Load Area Reliability Need

Load Management

Strategy: Lower the total electricity demand required *within* the TLA boundaries during peak hours

Key Actions:

- **Load Reduction**
- **Load Shifting**

Internal Resources

Strategy: Increase the amount of power produced or stored *inside* the TLA

Key Actions:

- **Energy Storage Systems**
- **Distributed Energy**
- **Other New Resources**

Transmission Expansion

Strategy: Increase the "Import Limit" to bring more power in *from the outside* grid

Key Actions:

- **New Feeders**

Availability of Point(s) of Interconnection (POI)

Con Edison is constructing two new load serving substation by summer 2028:

- Brooklyn Clean Energy Hub (345 kV) – in northwest Brooklyn – to provide supply to the new Gateway 27 kV Distribution Area Substation
  - The BCEH project is designed to supply up to 1,900 MW of load and establishes new POIs in NYC
  - The project has the capacity to accommodate up to 6,000 MW of generation resources:
    - 6 Open Bus Positions at BCEH (4,500 MW)
    - 2 Open Bus Positions at Farragut (1,500 MW)
- Eastern Queens (138 kV) to provide supply to the new Idlewild 27 kV Distribution Area Substation
  - The Eastern Queens 138 kV transmission substation provides two POIs for generation resources (up to 600 MW)

Technical Evaluation Process

- Step 1: Portfolio Assembly (Aggregation)
  - Submitted solutions (Load Management, Generation, Battery Storage, etc.) are grouped into portfolios to meet the total identified MW/MWh deficiency
  - This step ensures the "math" adds up on paper before testing the physics
- Step 2: Technical Verification (Power Flow Modeling)
  - Portfolios are modeled in AC Power Flow software to test them against the applicable criteria
  - This checks if the portfolio solves the reliability needs
- Step 3: Iterative Refinement
  - If modeling shows "residual" needs (e.g., a specific transformer still overloads under contingency), the portfolio is adjusted by swapping or adding resources until the full security need is met

Q&A

Q&A

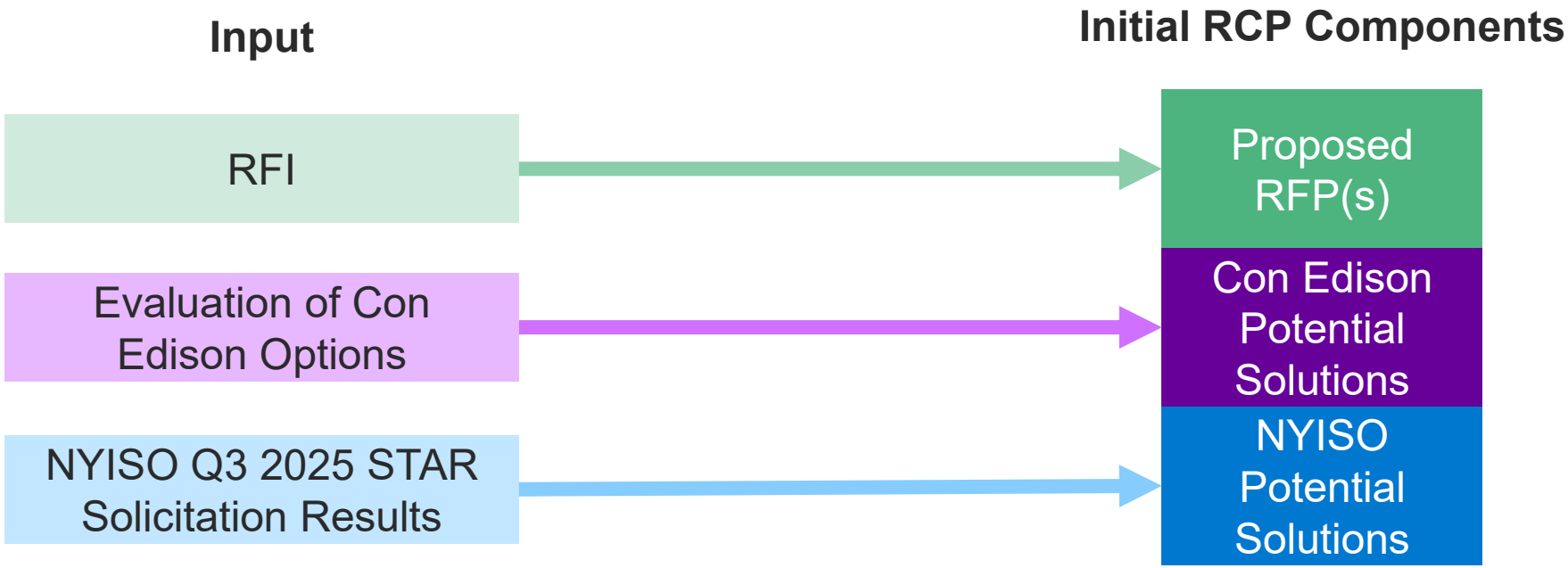
- For in-person attendees: Please stay in your seat and raise your hand. We have microphones and will give you one while you ask your question.
- Please state your name and affiliation before you ask your question.

- For virtual attendees: Please type your question in the chat.

NYC Reliability Needs RFI

Incorporating RFI into Initial Reliability Contingency Plan

- RFI responses will inform Requests for Proposal (RFPs) that the Company will consider proposing in its Initial Reliability Contingency Plan
- Other components will include an evaluation of actions the Company can take to address the Need, and the results of the NYISO solicitation



About this RFI

This RFI:

- Is meant to “turn over every stone” for potential solutions to meet the Need
- Will not result in any contractual agreement between the Company and any respondent; pricing is non-binding
- Informs the June 2026 NYC Reliability Contingency Plan (RCP) including future potential Requests for Proposal

Principles for Acceptable Responses

Con Edison expects all Responses to be consistent with the following principles[1] which will also guide development of the Company's Reliability Contingency Plan to be filed in June 2026:

Principle	Description
Clean & Non-Emitting	Only clean and non-emitting technologies will be considered as acceptable responses
Cost Effective	Solutions must prioritize cost effectiveness, including both upfront and ongoing costs; may also consider metrics like cost per reliable MW and duration of relief provided
Timely, Proven Deployment	Solutions must be straightforward to deploy, proven or demonstrably provable in the field, and capable of being implemented in time to meet the identified Need
Reliable & Verifiable Impact	Solutions must provide a clear, measurable, and reliable reduction in system-level demand
Impacts on DACs	Solutions should minimize negative effects on Disadvantaged Communities

1. These principles are consistent with the December Order Initiating Proceeding and Direction Reliability Contingency Plan Consolidated Edison Company of New York, Inc.

Solution Eligibility Guidelines

- Technology specific requirements are provided in Section 3.5 of the RFI
- Participation in existing programs administered by Con Edison or others may impact eligibility
- Solutions may be connected to the Grid in different ways, including to either the transmission or distribution system and located behind- or in-front-of a meter

RFI Solution Framework		Development Phase		
		Operational	In Development	New
Solution Type	Load Reduction			
	Load Shifting			
	Dispatchable Solutions			
	Non-Dispatchable Solutions			

Evaluation Criteria

Evaluation Criteria	Details
Addresses RFI & PSC Requirements	Information is comprehensive enough for evaluation and solutions are consistent with requirements including geographic constraints
Cost Effectiveness	The requested incentive for the proposed solution relative to its impact on the Need.
Feasibility	Solution is technologically and/or commercially mature and may credibly be implemented within the required timeframe.
Scale of Relief Provided	Extent to which the proposed solution would address the Need
Flexibility	Ability of the proposed solution contribute if the Need changes
Timeliness	Likelihood that the solution will provide load relief before the need period
Availability & Reliability	Certainty that the proposed solution will provide firm, dependable load relief during the need period
Community Impacts	Long-term positive or negative impact that the proposed solution may have on the community in the identified area (e.g., lower energy costs, noise, pollution, support for low-income housing, etc.).

FAQs

FAQs (1 of 2)

- What is the definition of clean and non-emitting?
  - *The Company does not have an additional definition beyond what has been provided in the Order. Respondents are encouraged to explain their views concerning why their solution is clean and non-emitting.*
- How many days are solutions expected to respond and how does this apply to load shifting?
  - *The load reduction (or load shifting) should be permanent or available during all days of the summer capability period for the proposed hours in support of the Needs.*
- How are you measuring cost effectiveness?
  - *We will evaluate the total funds requested from Con Edison compared to the capability provided. Responses must clarify and include funds assumed from other Con Edison programs in the total funds requested.*
  - *We are not prescribing how potential incentives would be structured at this time and welcome proposals.*
- Will Con Edison support with customer acquisition?
  - *Respondents are responsible for customer acquisition. To the extent a solution does not have pre-identified locations or customers, the response should detail who the target customers are, the achievable number of customers that need to be engaged, and the most cost effective and most confident strategy to acquiring the target customers identified.*

FAQs (2 of 2)

- Are responses required to address the full Need?
  - *No. Individual responses are not expected to address the full Needs. Responses can address a portion of the Needs in terms of demand, hours of the Needs, and years in which solution is active.*
- Can we submit new technologies?
  - *We are looking for solutions which are proven or can be demonstrated to be proven. We are looking for firm, dependable load relief during the need period.*
- Will solutions that do not meet all the principles be considered?
  - *We will consider all solutions. In our Initial NYC Reliability Contingency Plan, we will explain why solutions were rejected if applicable, which could include not meeting the principles outlined in the Initiating Order from the Public Service Commission.*
- What if regulatory changes are required to unlock the full potential of the solution?
  - *If a solution assists in solving the Needs, the Company will review it. Proposals need not be constrained by current regulatory, tariffs, or other programmatic rules but should identify any aspect of the proposal that would require changes or exemptions to current rules and regulations.*
- Are any customers not eligible?
  - *All customers within the geographic constraints are eligible.*

Q&A

Q&A

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Next Steps

RFI Schedule

RFI Solicitation Milestones	Date*
RFI Issued	January 20, 2026
Introductory Webinar	January 27, 2026
Deadline to submit clarification questions (1st round)	January 30, 2026
Responses to clarification questions published (1st round)	February 9, 2026
Technical Conference	**February 10, 2026 10:30 AM – 1 PM**
Deadline to submit clarification questions (2nd round)	February 13, 2026
Responses to clarification questions published (2nd round)	February 20, 2026
Responses from Respondents due	**March 6, 2026 3 PM ET**

* Con Edison reserves the right to change any of the above dates.

Notes for Successful Submissions

- Submit responses to PeakSolutions@coned.com on or prior to 3pm on March 6th, 2026
- Keep attachments to less than 20 MB
- Send any questions to PeakSolutions@coned.com
- Follow response instructions, including providing financial information in either Attachment B-1 or B-2, as written in the RFI
- The RFI, Reliability Needs Report, and relevant attachments are available at www.ConEd.com/PeakSolutions

Thank You