

2025-2026 Installed Reserve Margin (IRM) Study - Sensitivity Cases

Case	Description	IRM (%)	NYC (%)	LI (%)	IRM (%) Change from Base	LOLH (hrs/yr)	EUE (MWh/yr)
0	2025-2026 IRM Preliminary Base Case (PBC)	23.600	75.983	102.517	-	0.388	234.724
	These are the Base Case technical results derived from knee of the IRM-LCR curve						
1	NYCA Isolated	29.065	79.825	107.632	5.465	0.335	216.717
	Track Total New York Control Area (NYCA) Emergency Assistance (EA) – NYCA system is isolated and receives no emergency assistance from neighboring control areas (New England, Ontario, Quebec, and PJM). Unforced Capacity Deliverability Rights (UDRs) are allowed						
2	No Internal NYCA transmission constraints	21.747	74.680	100.782	-1.853	0.378	344.743
	Track level of NYCA congestion with respect to the IRM model – eliminates internal transmission constraints and measures the impact of transmission constraints on statewide IRM requirements						
3	No Load Forecast Uncertainty	18.549	72.432	97.789	-5.051	0.282	69.018
	Shows sensitivity of IRM to load uncertainty, if the forecast peak loads for NYCA have a 100% probability of occurring						
4	No Wind Capacity	16.971	77.003	101.182	-6.629	0.380	246.713
	Shows wind impact for both land-based and off-shore wind units and can be used to understand Equivalent Demand Forced Outage Rate (EFORd) sensitivity						
5	No SCR Capacity	21.250	73.220	103.388	-2.350	0.373	229.252
	Shows sensitivity of IRM to the Special Case Resource (SCR) program						

Case	Description	IRM (%)	NYC (%)	LI (%)	IRM (%) Change from Base	LOLH (hrs/yr)	EUE (MWh/yr)
6a	Gas Constraints (Tan45) 11,000 MW of oil modeled	24.500	76.597	102.745	0.900	0.363	204.140
	Shows impact to reliability when winter capacity is reduced due to gas constraints and can be used to understand tightening winter conditions						
6b	Gas Constraints (Tan45) 8,000 MW of oil modeled	30.800	78.505	103.491	7.200	0.324	147.740
	Shows impact to reliability when winter capacity is reduced due to gas constraints and can be used to understand tightening winter conditions						
7	BTM Solar (Tan45)	24.646	76.881	104.138	1.046	0.410	260.175
	Shows the impact of modeling Behind-the-Meter (BTM) solar resources explicitly. The modeling can be used to understand the impact of evolving BTM solar penetration in the system.						

Note: All results are calculated by adding/removing capacity from Load Zones A - K unless otherwise noted

2024-2025* and 2025-2026 IRM Study - Sensitivity Cases Comparison†

Results based on Preliminary Base Case	IRM (%)	NYC (%)	LI (%)	IRM% Change from Base
Case 0				
2024-2025	20.8	72.7	109.9	-
2025-2026	23.6	76.0	102.5	-
<i>Delta</i>	2.8	3.3	-7.4	-
Case 1: NYCA Isolated				
2024-2025	27.0	77.2	116.2	6.2
2025-2026	29.1	79.8	107.6	5.5
<i>Delta</i>	2.1	2.6	-8.6	-0.7
Case 2: No Internal NYCA Transmission Constraints				
2024-2025	18.8	71.3	107.9	-2.0
2025-2026	21.7	74.7	100.8	-1.9
<i>Delta</i>	2.9	3.4	-7.1	0.1
Case 3: No Load Forecast Uncertainty				
2024-2025	15.7	69.1	104.7	-5.1
2025-2026	18.5	72.4	97.8	-5.1
<i>Delta</i>	2.8	3.3	-6.9	0.0
Case 4: No Wind Capacity				
2024-2025	14.0	73.4	108.4	-6.8
2025-2026	17.0	77.0	101.2	-6.6
<i>Delta</i>	3.0	3.6	-7.2	0.2
Case 5: No SCR Capacity				
2024-2025	17.7	69.5	109.9	-3.1
2025-2026	21.3	73.2	103.4	-2.4
<i>Delta</i>	3.6	3.7	-6.5	0.8

* The 2024-2025 sensitivity metrics shown are before the updated EA assumptions were adopted in the 2024-2025 IRM PBC.

† The comparison is only for sensitivity cases 0-5.

Appendix: Plots showing trends for 2024-2025* and 2025-2026 IRM sensitivities study[†]

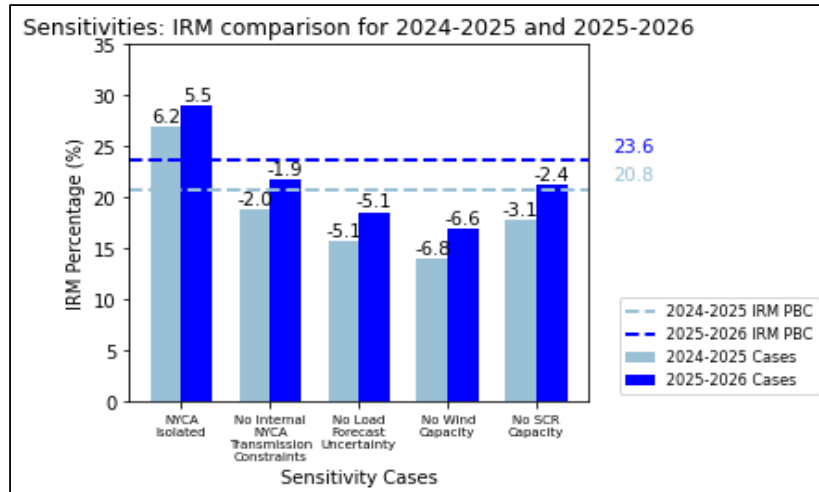


Figure 1: IRM comparison for 2024-2025 and 2025-2026 IRM sensitivities study

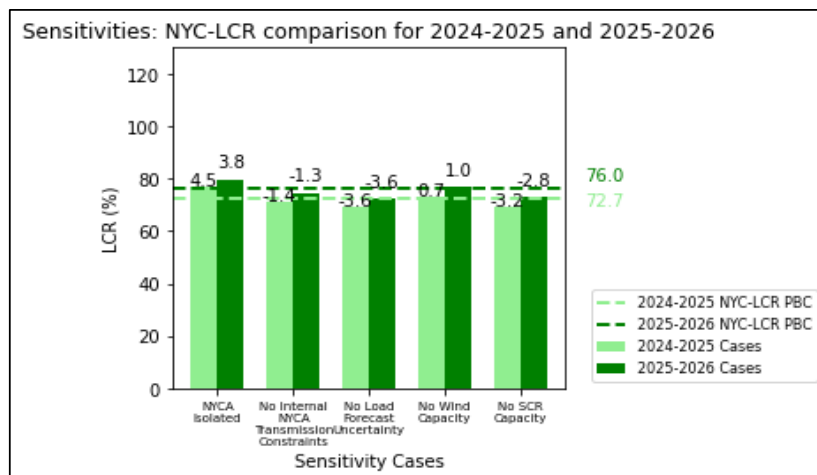


Figure 2: NYC-LCR comparison for 2024-2025 and 2025-2026 IRM sensitivities study

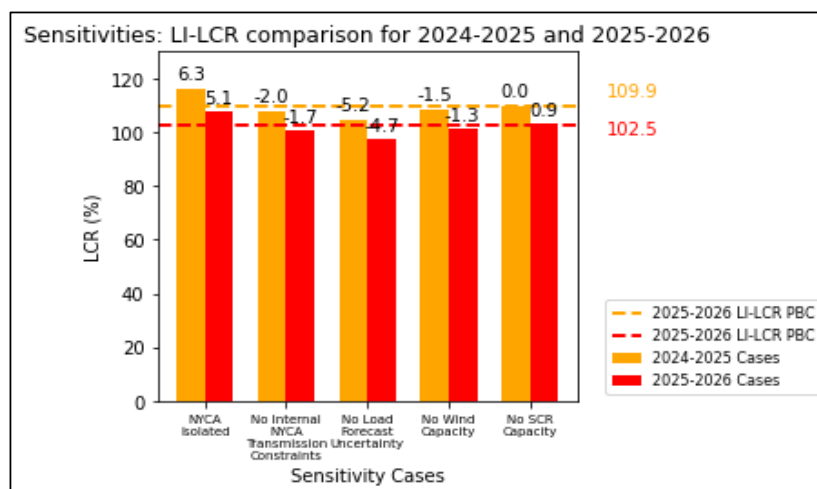


Figure 3: LI-LCR comparison for 2024-2025 and 2025-2026 IRM sensitivities study

* The 2024-2025 sensitivity metrics shown are before the updated EA assumptions were adopted in the 2024-2025 IRM PBC.

† The comparison is only for sensitivity cases 0-5.