

Integrated Energy Data Resource (IEDR) Phase 2 Status and Summary Report

Prepared by:
New York State Energy Research and Development Authority (NYSERDA)
Albany, NY

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1 Phase 2 Status and Summary

1.1 ABSTRACT

The New York State Energy Research and Development Authority (NYSERDA) submits this report in compliance with the Public Service Commission (PSC or Commission) Order Approving Integrated Energy Data Resource Phase 2 Budgets¹ (the “IEDR Phase 2 Order”), issued on January 19, 2024. Specifically, the IEDR Phase 2 Order directed NYSERDA to file an IEDR Phase 2 Status and Summary Report. In line with the IEDR Phase 2 Order, this Phase 2 Status and Summary Report, among other things, provides information to the PSC, market participants, and other stakeholders regarding the progress made in achieving the Integrated Energy Data Resource (IEDR) Program’s stated goals and objectives, accounts for the evolution of programmatic processes and scope changes in Phase 2, demonstrates IEDR Phase 2 accomplishments, addresses any gaps in meeting requirements, and provides “information necessary to support funding and authorization for the continued future operation and maintenance of the IEDR initiative”².

Phase 2 accomplishments include extensive foundational data acquisition, including development of consistent statewide data models across participating utilities, as well as improving data integration, aggregation, and accessibility, enabling privacy-safe aggregation approaches, and supporting querying across previously siloed utility and non-utility datasets. Together, these activities operationalized a statewide data framework intended to support expanded query functionality, integrated insights, and additional user-facing capabilities over time. As further detailed in Section 4 and throughout this report, these steps were necessary to solve for existing problems with accessing utility data, drive towards utility data standardization and interoperability, and enable reliable, statewide data analysis at scale across utility territories.

1.2 BACKGROUND

1.2.1 The IEDR Order

New York State (NYS) is transforming its electricity system into one that is cleaner, more resilient, and affordable through changes in energy policy. Adequate access to useful energy and energy-related data is required to achieve this transformation.

On February 11, 2021, the PSC issued the IEDR Order³ based on DPS staff recommendations, where the Order directed the development of an IEDR to securely collect, integrate, and provide

¹ Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, January 19, 2024, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1DC44A88B299F0}>.

² State of New York PSC, Order Approving Integrated Energy Data Resource Phase 2 Budgets, 20.

³ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, Issued and Effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>.

broad and appropriate access to large and diverse sets of valuable energy and energy-related information on one statewide data platform. The IEDR Order designated NYSERDA as the IEDR Program Sponsor responsible for defining, initiating, overseeing, and facilitating the IEDR Program on behalf of NYS.

The IEDR Order established the regulatory expectation that the IEDR would enable approximately 50 use cases throughout two phases of development, with specific deadlines for achieving minimum performance capabilities:

- **Phase 1:** The initial IEDR implementation was required to enable at least five of the highest priority use cases with an expectation that 10 or more could be achieved and was scheduled to be completed 24 to 30 months after the Program Manager’s work commenced.
- **Phase 2:** In Phase 2, the IEDR was anticipated to expand and enhance approximately 40 additional use cases, building on the successful implementation and operation of Phase 1. Phase 2 was scheduled to be completed 30 to 36 months after the completion of Phase 1; completion of Phase 2 development is currently anticipated on March 31, 2027.

1.2.2 The Data Access Framework (DAF)

Additionally, in April 2021 the PSC issued an order, Adopting a Data Access Framework and Establishing Further Process⁴ (the “DAF Order”), whereby the Commission established a uniform and comprehensive Data Access Framework (DAF) to govern the means and methods for accessing and protecting all energy-related information.

1.2.3 IEDR as a Data Custodian

On October 13, 2023, the Commission issued the Order Addressing Integrated Energy Data Resource Matters⁵ (the “October 2023 Order”), whereby the Commission clarified that the IEDR Platform is a “data custodian” and stated that “[t]he IEDR is such a centralized data warehouse that will function as a data custodian for the purposes of managing the energy-related data received from various sources, including from the Joint Utilities (JU).”⁶ The October 2023 Order further required the JU to transfer Customer Data Sets to the IEDR Administrator (the IEDR Development Team) without customer consent, as such a transfer is an exchange of customer data between data custodians. The October 2023 further clarified that “...Customer Data Sets are not the only data that the IEDR platform is intended to manage...This includes data elements

⁴ CASE 20-M-0082, In the Matter of the Strategic Use of Energy Related Data, Issued and Effective April 15, 2021.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}&DocTitle=Order%20Adopting%20a%20Data%20Access%20Framework%20and%20Establishing%20Further%20Process.>

⁵ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Addressing Integrated Energy Data Resource Matters, Issued and Effective October 13, 2023.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={D0102A8B-0000-CE1E-95DD-1F79716C9AA8}&DocTitle=Order%20Addressing%20Integrated%20Energy%20Data%20Resource%20Matters.>

⁶ State of New York PSC, Order Addressing Integrated Energy Data Resource Matters, 11.

identified by Staff in Appendix B of the IEDR Whitepaper⁷ and adopted as part of the IEDR Order, which includes Customer Data Sets, as well as various types of utility system data.”⁸

The October 2023 Order also stated that “[a]s a data custodian, the IEDR will be governed by the DAF, which establishes the means and methods for [Energy Service Entities] ESEs to access Customer Data Sets and other energy-related information from the IEDR platform, while ensuring that such information is properly protected from unauthorized disclosures.”⁹

Accordingly, all aspects of the IEDR comply and will continue to comply with the framework and requirements that the Commission established for the DAF.

1.2.4 Phase 1 Summary

NYSERDA, as the Program Sponsor, previously advanced Phase 1 goals by procuring core Program Team services, establishing governance, coordination, and advisory bodies as required by the IEDR Order; and extensively engaging stakeholders to ensure the needs of potential IEDR users remained at the center of design and development activities. On March 31, 2023, the IEDR Program Team released an Initial Public Version (IPV) of the IEDR that addressed three priority use cases¹⁰. On March 27, 2024, the IEDR Program Team published an additional five use cases, for a total of eight use cases developed and released in Phase 1, representing a Minimum Viable Product (MVP). All Phase 1 program activities were conducted and completed within the Phase 1 budget established in the IEDR Order¹¹.

1.2.5 Phase 2 Order

On January 19, 2024, the PSC issued their Order Approving Integrated Energy Data Resource Phase 2 Budgets¹² (the IEDR Phase 2 Order). The IEDR Phase 2 Order approved funding for Phase 2 of the IEDR Program, which officially began on April 1, 2024. Phase 2 funding supported the established regulatory expectations that the IEDR would enable approximately 50 use cases by the end of Phase 2, by building on the accomplishments of Phase 1, and deploying approximately 40 additional use cases.

As it relates to the filing of this report, the IEDR Phase 2 Order stated that “NYSERDA shall file the IEDR Phase 2 Status and Summary Report, on or before April 1, 2026, which is approximately three months before the expected completion of Phase 2. This report shall include any information necessary to support funding and authorization for the continued future

⁷ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Whitepaper Recommendation to Implement an Integrated Energy Data Resource, May 29, 2020.

<http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={43298F6A-3CA4-435FBC9D-6DEF6F575836}>

⁸ State of New York Public Service Commission, DPS Staff Whitepaper Recommendation to Implement an Integrated Energy Data Resource, 12.

⁹ State of New York Public Service Commission, Order Addressing Integrated Energy Data Resource Matters, 12.

¹⁰ New York State Energy Research and Development Authority - Integrated Energy Data Resource (IEDR) Program. The Initial Public Version (IPV) of the IEDR Platform has been launched! <https://www.nyscda.ny.gov/All-Programs/Integrated-Energy-Data-Resource-Program>

¹¹ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, Issued and Effective February 11, 2021.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>

¹² Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, Issued and Effective January 19, 2024.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1DC44A88B299F0}>

operation and maintenance of the IEDR initiative.”¹³ To better align the filing of this report with meaningful Phase 2 program milestones related to data acquisition and Query Tool development and to provide a more complete and comprehensive report to the Commission, NYSERDA filed three respective Requests for Extension with the Commission. Both the initial¹⁴, secondary¹⁵, and tertiary¹⁶ Request for Extension were granted by the Secretary on March 27, 2026, June 26, 2026, and July 29, 2026, respectively, allowing for filing of this report on or before September 29, 2026.

1.3 Program Participants

1.3.1 IEDR Program Team

The IEDR Program Team consists of the following membership:

Program Manager: Deloitte Consulting LLP (“Deloitte”) was competitively selected as Program Manager in October 2021. As Program Manager, Deloitte maintains the overall program schedule; administers the governance, coordination, and stakeholder groups; and oversees all technical activities that lead to the operation of the IEDR in accordance with the IEDR Order.

Utility Data Advisor: Pecan Street Inc. (“Pecan Street”) was competitively selected as Utility Data Advisor (UDA) in October 2021. As UDA, Pecan Street provides subject matter expertise on utility data systems to DPS staff and participates in the IEDR UCG described below.

Development Team: In October 2022, NYSERDA competitively selected a team led by E Source Companies LLC (“E Source”) to design, build, and operate the IEDR platform. The Development Team (which currently also includes TRC Companies) develops system requirements and architecture; establishes secure and efficient interfaces for data transfer to the IEDR from multiple sources; and develops, tests, delivers, and maintains the IEDR platform.

¹³ State of New York Public Service Commission, Order Approving Integrated Energy Data Resource Phase 2 Budgets, 20.

¹⁴ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Request for Extension - IEDR Phase 2 Status and Summary Report, dated March 24, 2026.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A058209D-0000-C511-BCBF-E0CFA7A824F}&DocTitle=NYSERDA%20IEDR%20Phase%202%20Report%20-%20Request%20for%20Extension%20of%20Time>

¹⁵ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Second Request for Extension - IEDR Phase 2 Status and Summary Report, dated June 24, 2026.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={E06CFA9E-0000-CC51-8A6C-F9EF60C223A4}&DocTitle=IEDR%20Phase%202%20Report%20Request%20for%20Extension>

¹⁶ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Second Request for Extension - IEDR Phase 2 Status and Summary Report, dated July 28, 2026.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={806CA99F-0000-CB2D-A679-FB6C77F69807}&DocTitle=Request%20for%20Extension%20of%20Time%20-%20IEDR%20Phase%202%20Status%20and%20Summary%20Report>

1.3.2 Program Governance, Coordination, and Advisory Bodies

The IEDR Order called for establishing three bodies to guide the IEDR Program’s activities: the IEDR Steering Committee, Utility Coordination Group (UCG), and Advisory Group (AG). During Phase 2, IEDR governance, coordination, and advisory bodies matured to operate in tandem with evolving program needs. Adaptive stakeholder engagement structures and feedback mechanisms serve continually changing program needs and dynamically inform program development, while continuing to satisfy foundational directives established by the IEDR Order and the IEDR Program Charter. Below are summaries of Phase 2 Steering Committee, AG, Environmental Justice Stakeholder Working Group (IEDR EJWG), and UCG structures, activities, and functions.

1.3.3 Steering Committee

The IEDR Steering Committee, consisting of five members from DPS staff and four members from NYSEERDA, was convened by NYSEERDA starting on March 31, 2021, in accordance with the IEDR Order for the “first meeting to occur within 60 days of this Order’s issuance.”¹⁷ The Steering Committee reviews and, when necessary, acts on (1) program issues that require Steering Committee awareness and possible actions or decisions; (2) significant program risks that require management and mitigation; (3) planned and unplanned deviations from the program scope, schedule, or budget; and (4) upcoming program milestones—especially those that depend on Steering Committee actions or decisions. Initially, the Steering Committee met monthly and has transitioned to meeting biweekly in Phase 2.

1.3.4 Advisory Group (AG)

The IEDR Order mandated the establishment of the IEDR AG, representing relevant stakeholder groups, including, but not limited to, DER developers, utilities, energy consumers, state, and local government entities, and interested industry associations. The AG was operationalized in two tiers to increase efficiency and deepen program understanding of stakeholder-centric insights related to use case and platform development:

Tier 1 AG meetings were held as large group sessions focused on overall program development and scheduled on a quarterly basis in 2024.

Tier 2 AG meetings were held as small group sessions or 1-1 interviews that reviewed specific use cases and software features. Effective September 2023 until Q1 2025, Tier 2 AG meetings were scheduled based on thematic use case groupings and the corresponding program development roadmap.

AG sessions provided the IEDR Program Team opportunities to solicit feedback on all relevant program progress, including progress toward planned IEDR capabilities, prioritization of use

¹⁷ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, Issued and Effective February 11, 2021.
<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>

cases for development, and stakeholder input on IEDR Program priorities and milestones. The Program Team facilitated a total of 26 AG meetings during Phase 2.

1.3.5 IEDR Environmental Justice Stakeholder Working Group (IEDR EJWG)

In Phase 2, the IEDR Program Team procured contracting services from individual contractors from the NYSEDA Disadvantaged Communities Stakeholder Services Pool to form the IEDR EJWG. Engagement with this working group created dedicated space and time for representatives of environmental justice and frontline communities to directly engage with the IEDR Program Team and provide feedback to inform IEDR platform development, the end use of which is intended to direct benefits to environmental justice and frontline communities.

1.3.6 Utility Coordination Group (UCG)

A UCG was established in Phase 1, in accordance with the IEDR Order. The UCG has provided and will continue to provide a venue for collaboration, coordination, and oversight of the utility activities related to the design and implementation of the IEDR, including discussing and aligning on the means and methods of acquiring the data listed in Appendix B of the IEDR Whitepaper.

In accordance with the IEDR Program Charter, “the UCG may establish one or more subcommittees to support its work.”¹⁸ Subsequently, UCG subcommittees were established in Phase 2 of the IEDR Program. As described in greater detail in Section 3 of this report, UCG Subcommittees are specialized committees designed to facilitate focused discussions, resolve technical challenges, and coordinate efforts among utility stakeholders to support the efficient and accurate collection of data required for the IEDR platform.

1.4 Commission Orders Impacting Development

1.4.1 January 2024 Decision Order Approving Integrated Energy Data Resource Phase 2 Budgets

On May 12, 2023, NYSEDA filed the IEDR Phase 2 Proposal¹⁹ as required by the IEDR Order. On January 19, 2024, the PSC issued the Phase 2 Order²⁰ that approved the Phase 2 Proposal and budget filed by NYSEDA. The Phase 2 Order acknowledged the continuation of established program participant roles of the Program Sponsor (NYSEDA), the Program Manager (currently Deloitte), the Development Team (currently E Source), and the UDA (currently Pecan Street).

¹⁸ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Integrated Energy Data Resource Program Consolidated Program Charter, dated September 2023.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={D4B303CA-B214-4D59-BE39-95719013941C}&DocTitle=NYSEDA%20IEDR%20Program%20Charter>

¹⁹ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, IEDR Phase 2 Proposal.

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={D4B303CA-B214-4D59-BE39-95719013941C}&DocTitle=NYSEDA%20IEDR%20Program%20Charter>

²⁰ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Approving Integrated Energy Data Resource Phase 2 Budgets. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1D-C44A88B299F0}&DocTitle=Order%20Approving%20Integrated%20Energy%20Data%20Resource%20Phase%202%20Budgets>

Funding caps were established for each of these program roles as well as for each participating utility. The Order also acknowledged that Phase 2 funding includes dedicated administrative funds, as requested in the Phase 2 Proposal, for contracting with or reimbursing organizations that support DACs, to ensure that DAC use cases and functionality are prioritized.

1.4.2 November 2024 - Order Approving Tariff Amendments, with Modification, on a Permanent Basis

This Order authorized utility tariff revisions related to liability for unauthorized or inadvertent disclosures of data from the IEDR platform to become effective, with modifications, on a permanent basis on December 1, 2024. On October 13, 2023, the PSC issued its IEDR Order directing the JU to file proposed tariff revisions. Specifically, each utility was directed to utilize the following language in its respective tariff(s): “[Utility] has provided non-anonymized and non-aggregated customer specific data to the State’s IEDR pursuant to the New York PSC’s Order Addressing Integrated Energy Data Resource Matters issued on October 13, 2023, in Case 20-M-0082. If such data is improperly released from the IEDR as the result of a cyber-related incident or inadvertently disclosed by the IEDR administrator or its agents or contractors due to an operational error, [Utility] will not be liable for such release or disclosure. Consistent with the Commission’s policies regarding data ownership, the customer (not the utility), is the owner of the customer’s data.”²¹ Tariff amendments were filed by Con Edison, O&R, and Liberty Utilities on November 9, 2023; Central Hudson on November 10, 2023; and Niagara Mohawk, KEDNY, KEDLI, NFG, NYSEG, and RG&E on November 13, 2023. The tariffs went into effect on December 1, 2023, on a temporary basis on a temporary basis²².

1.4.3 December 2024 Decision – Order Approving Transition of Utility Reported Community-Scale Energy Usage Data

This Order approved the DPS Staff’s (Staff) proposal on the transition of utility reported community-scale energy usage data (Proposal). “The Proposal recommended that the Commission relieve the IOUs’ of their Utility Energy Registry (UER) compliance requirements, which include the aggregation and reporting of community-scale: (1) energy usage; (2) [Community Choice Aggregation] CCA opt-out eligible load; (3) [Installed Capacity Market] ICAP tags; and (4) [Distributed Energy Resource] DER generation data, directly to the UER

²¹ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Approving Tariff Amendments, with Modification, on a Permanent Basis, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={80D44593-0000-CB1F-AF3A-A112705A5DB2}&DocTitle=Order%20Approving%20Tariff%20Amendments,%20with%20Modification,%20on%20a%20Permanent%20Basis>

²² “In compliance with the IEDR Order, certain utilities modified tariff leaves that had already been previously modified to implement the Order Implementing PSL §73, but which remain effective on a temporary basis only. Specifically, the amendments to Central Hudson’s P.S.C. No. 15, leaf No. 96 and P.S.C. No. 12, leaf No. 65, Con Edison’s P.S.C. No. 9, leaf No. 79, NFG’s P.S.C. No. 9, leaf No. 53, NYSEG’s P.S.C. No. 119, leaf No. 102 and P.S.C. 90, leaf No. 87, O&R’s P.S.C. No. 4, leaf No. 49, and RG&E’s P.S.C. No. 16, leaf No. 111, related to the Order Implementing PSL §73, shall continue to remain in effect on a temporary basis until acted upon by the Commission.” Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Approving Tariff Amendments, with Modification, on a Permanent Basis, pg. 3 <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId=%7B80D44593-0000-CB1F-AF3A-A112705A5DB2%7D>

once the IEDR begins to publish community-scale energy usage data.”²³ Staff proposed that the current UER data protocol persists during the transition of community-scale energy usage data hosting to the IEDR.

As of the effective date of this Order (December 20, 2024), the JU were directed to discontinue reporting aggregated community data to the Utility Energy Registry and instead report all data fields for which these utilities are currently responsible for producing in compliance with UER data protocol directly to NYSERDA until notified to stop.

Further, once the IEDR publishes the use case that integrates the community-scale energy usage data on the statewide centralized platform, NYSERDA shall file one or more notifications with the Secretary to the Commission in Cases 17-M-0315 and 20-M-0082 notifying the individual utilities identified in Ordering Clause No. 2 to stop reporting their aggregated community data directly to NYSERDA.

1.4.4 December 2024 - Order Clarifying Integrated Energy Data Resource Phase 2 Cost Collections

In the IEDR Phase 2 Order, the Commission approved budgets for each of the JU, as well as the NYSERDA, to implement Phase 2 of the IEDR initiative. On October 31, 2024, the Joint Utilities filed a petition (Petition) seeking clarification on the Commission’s IEDR Phase 2 Order. The Petition sought clarification regarding the specific collection amounts for each jurisdictional electric utility to recover IEDR Phase 2 costs incurred by NYSERDA, and the time period over which the collection amounts are to be collected.

The Order Clarifying Integrated Energy Data Resource Phase 2 Cost Collections clarified the utility-specific collections schedules for each of the jurisdictional electric utilities to recover NYSERDA’s IEDR Phase 2 costs.

Figure 1 - IEDR Phase 2 Cost (including Program Manager, Development Team, UDA, and Program Sponsor) Allocation and Collection Schedule for Utilities and Long Island Power Authority (LIPA)

IEDR Phase 2 Cost (including Program Manager, Development Team, Utility Data Advisor, and Program Sponsor) Allocation and Collection Schedule for Utilities and LIPA								
	Program Costs (nominal)	Central Hudson	Con Edison	NYSEG	National Grid	O&E	RC&E	LIPA
2025	\$ 22,363,272	\$ 853,200	\$ 5,124,037	\$ 3,719,191	\$ 5,631,155	\$ 713,111	\$ 1,231,233	\$ 1,127,855
2026	\$ 1,772,110	\$ 1,122,110	\$ 1,115,880	\$ 1,124,110	\$ 1,124,110	\$ 1,124,110	\$ 1,124,110	\$ 1,124,110
Total:	\$ 24,135,382	\$ 1,875,310	\$ 6,239,917	\$ 4,843,301	\$ 6,755,265	\$ 1,837,221	\$ 2,355,343	\$ 2,251,965

23 Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Approving Transition of Utility Reported Community-Scale Energy Usage Data, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={9021E593-0000-C013-92F7-7C55605DCDF3}&DocTitle=Order%20Approving%20Transition%20of%20Utility%20Reported%20Community-Scale%20Energy%20Usage%20Data>

1.4.5 October 2025 - Order Directing Staff Proposal To Modify Data Access Requirements

On April 15, 2021, the Commission adopted the DAF to “...serve as a single source for statewide data access requirements and provide uniform and consistent guidance on what is needed for access to energy-related data.”²⁴ The DAF Order specified that “...the Data Access Framework adopted here applies to any ESE seeking access to energy-related data from a data custodian”²⁵, and that, “...the data custodian will be any entity where the energy-related data are housed and being accessed, such [as] the utility or a centralized data warehouse”²⁶.

Further, the DAF highlighted the importance of review and, when necessary, modification to these data access requirements to ensure that appropriate data access can be supported. Since the issuance of the DAF Order, multiple DAF compliance filings have been submitted by the JU for Commission review, including both the Data Access Implementation Plan and the Customer Consent Plan as detailed in the DAF. However, and as described in the Order Directing Staff Proposal To Modify Data Access Requirements, “At the same time, the data access and data security landscape has continued to evolve. Moreover, Data Ready Certification implementation has not been realized to date, and ESEs are still required to sign the one-size-fits-all Data Security Agreement with each utility, in order to access consented customer data via any access mechanism.”²⁷

Through the Order Directing Staff Proposal To Modify Data Access Requirement, the Commission directed DPS Staff to file recommendations for modifications to DAF data access requirements, including a proposal regarding potential Framework modifications “...that further support customer choice, enable useful access to useful data, and address cybersecurity and privacy concerns.”²⁸ The Order specified that “...a comprehensive review of the Framework must not only look requirements themselves but propose a solution for how the intended function and purpose of Data Ready Certification can be achieved.”²⁹ As described within this Order, “...the Commission intended for the Data Ready Certification to act as the mechanism for ensuring ESE requirements were appropriately assigned by risk, a comprehensive review of the Framework must not only look at the requirements themselves but propose a solution for how the intended function and purpose of Data Ready Certification can be achieved.”³⁰

²⁴ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Adopting a Data Access Framework and Establishing Further Process, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}&DocTitle=Order%20Adopting%20a%20Data%20Access%20Framework%20and%20Establishing%20Further%20Process>

²⁵ State of New York Public Service Commission, Order Adopting a Data Access Framework and Establishing Further Process, 10.

²⁶ State of New York Public Service Commission, Order Adopting a Data Access Framework and Establishing Further Process, 10.

²⁷ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Directing Staff Proposal to Modify Data Access Requirements, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={908C029A-0000-CD2F-B577-82AACECAC411}&DocTitle=Order%20Directing%20Staff%20Proposal%20to%20Modify%20Data%20Access%20Requirements>

²⁸ State of New York Public Service Commission, Order Directing Staff Proposal to Modify Data Access Requirements, 3.

²⁹ State of New York Public Service Commission, Order Directing Staff Proposal to Modify Data Access Requirements, 8.

³⁰ State of New York Public Service Commission, Order Directing Staff Proposal to Modify Data Access Requirements, 8.

The Order Directing Staff Proposal To Modify Data Access Requirements clarified that, “...DPS staff’s proposal shall also take into consideration the following: (1) how customer understanding of data sharing is evolving; (2) the risks associated with data sharing; (3) customer expectations for providing consent; (4) legislation related to cybersecurity, privacy, and customer consent; and (5) provisions in the UBPs related to data points available, cybersecurity and privacy requirements, and customer consent requirements.”³¹

The Commission directed DPS staff to, within 120 days of the date of this Order, file a proposal regarding potential Framework modifications that further support customer choice, enable useful access to useful data, and address cybersecurity and privacy concerns. On February 13, 2026, and April 20, 2026, July 20, 2026, and August 28, 2026, respectively, DPS Staff filed extension requests. On February 17, 2026, April 27, 2026, July 21, 2026, and August 28, 2026, respectively, the Commission granted the extension requests. The deadline for Staff comments was September 4, 2026. While it is anticipated that proposed modifications to the DAF may have an impact on data access parameters and mechanisms within the IEDR, NYSERDA is still reviewing, and the IEDR’s programmatic response to the upcoming DAF recommendations will be documented in future Quarterly Reports.

2 Phase 2 Status and Summary Report Overview

The intent of the Phase 2 Status and Summary Report is to inform the Commission and general stakeholders of the status of Phase 2 program activities and accomplishments and to provide information to support Commission decision making regarding the future operation and maintenance of the IEDR initiative. This report culminates in NYSERDA's recommendation that IEDR development should continue in a Phase 2.5, a one-year transitional period that would allow the IEDR to continue to comprehensively complete data acquisition activities, expand data availability through the IEDR Query Tool, close existing data gaps, enhance data quality, validate that the data is fit for purpose for high priority objectives, increase the range of priorities that the data is fit for purpose to support, and further coordinate with DPS to develop a specific and actionable Phase 3 proposal.

Throughout this report, several requests are made to the Commission regarding reporting structure and formalizing programmatic precedent; the full list of requests to the Commission has been consolidated in this report’s conclusion (Section 8) below.

2.1 Proposed Reporting Bifurcation

As seen throughout the subsequent sections of this report, significant progress has been made in advancing Phase 2 development and visioning a future potential Phase 3 of the IEDR Program. However, additional time, program planning, and phased reporting may be required to provide

³¹ State of New York Public Service Commission, Order Directing Staff Proposal to Modify Data Access Requirements, 9.

detailed information sufficient to support Commission action on Phase 3. As a result, NYSERDA recommends that this Phase 2 Status and Summary Report serve as the first in a series of two filings: this Phase 2 Status and Summary Report and a separate Phase 3 Proposal. This bifurcation of final Phase 2 reporting follows existing precedent set in Phase 1, in which the Phase 1 Status and Summary Report and the Phase 2 Proposal were filed separately, sequentially, and procedurally to secure additional IEDR Program funding in a comprehensive and actionable manner.

NYSERDA requests Commission review and ruling on the approach to bifurcate final Phase 2 reporting in line with existing reporting precedent.

2.2 Phase 3 Proposal Overview

Projected to be ready for filing in Q1 2027, the recommended Phase 3 Proposal will focus on Phase 3 specifics that will be validated over the coming months and will include information supported by currently unfolding coordination with utilities, to-be validated development priorities, and other practical considerations for Phase 3 planning and budgets. A final recap of Phase 2 accomplishments will also be included in the Phase 3 Proposal and regular program Quarterly Reports.

As previously stated, NYSERDA proposes that the Phase 3 Proposal function as the second in a series of two reports: the Phase 2 Status and Summary Report and the Phase 3 Proposal, that collectively will supply all “...information necessary to support funding and authorization for the continued future operation and maintenance of the IEDR initiative.”³²

3 Phase 2 Program Operations Summary

3.1 Re-sequencing Program Operations

Initially, a use case-centric approach to development was envisioned and described in the IEDR Order, stating “...the Commission agrees with the proposed development approach that is centered around identifying and prioritizing IEDR use cases that provide the most value to New York State’s energy stakeholders”.³³ The recommended approach to development was accompanied by a recommendation to address the standardization of data, further stating “[t]o address the standardization of data, DPS Staff recommends that all information providers should fully align each provided data element’s attributes with standards for the attributes required to meet the needs of the use cases enabled by the IEDR. Important attributes that significantly

³² State of New York Public Service Commission, Order Approving Integrated Energy Data Resource Phase 2 Budgets, 20.

³³ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, 14.

affect a data element's usefulness - including temporal granularity, spatial granularity, precision, accuracy, age, and uniformity – should all meet or exceed minimum levels of adequacy for each use case that employs that data element.”³⁴

In Phase 1 and early Phase 2 of the IEDR Program, program operations concurrently prioritized use case-centric development and data acquisition. However, efforts to acquire and operationalize utility data among multiple disparate utility organizations, and conversations with stakeholders, revealed the programmatic need to re-sequence data acquisition activities and foundationally prioritize data governance, standardization, and ensure the viability of long-term platform scalability. Specifically, it became apparent that sustainable delivery of use cases depended on first establishing standardized statewide data structures, governance processes, and repeatable utility data acquisition pipelines.

Prior to what would become a fundamental shift in program operations, the IEDR Program Team scoped data acquisition and stakeholder engagement activities based on specific use cases and thematic use case groupings. This use case-centric approach to platform development was coupled with the expectations set by the IEDR Order that “In Phase 2 of the IEDR program...the IEDR’s capabilities will be expanded with the addition of approximately 40 use cases, building on the successful implementation and operation of Phase 1.”³⁵ Anticipating potential shifts in the use case development roadmap, the Order caveated that “...these use cases may be updated, deferred, split into multiple use cases, or otherwise modified or removed in the final roadmap as a result of data availability, evolving stakeholder needs, the identification of higher priority use cases, or unforeseen shifts in the market.”³⁸ Consistent with the potential shifts in the use case roadmap envisioned by the Order, it became evident that continuing to develop isolated use cases without first addressing foundational issues with data acquisition would result in duplicated efforts, increased data inconsistencies, limitations in long-term platform scalability, and ultimately allowed known data acquisition challenges to prevail. To address these challenges in data acquisition, resequencing of program operations prioritized the acquisition of foundational data, guided by data elements represented in Appendix B of the IEDR Whitepaper, and enacted processes to align utility datasets to a foundational IEDR common data model that is projected to enable long-term use case development and future iterations of the IEDR platform.

While the shift toward foundational data acquisition and standardization established the common infrastructure needed to support current and future use cases more effectively and efficiently, the shift also re-sequenced the program’s ability to fully deploy the initially envisioned catalogue of use cases. As a result, and described in detail within Section 4.15, progress has been made in acquiring foundational data that is essential to the initial catalogue of stakeholder use cases, however, only a portion of the original catalogue of use cases will be deployed within Phase 2.

³⁴ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, 12.

³⁵ State of New York Public Service Commission, Order Approving Integrated Energy Data Resource Phase 2 Budgets, page 5-6.

Foundational data acquisition to enable use case development requires greater technical collaboration with utilities. Accordingly, the Program Team and the Steering Committee worked together and formed a revised approach to foundational data acquisition, including the creation of standardized data specifications, validation processes, and coordinated approaches to improve data consistency, quality, and usability among participating utilities. These activities and more are described in greater detail in Section 4 of this report.

While cumulative technical challenges in data acquisition led to resequencing program operations, and a corresponding necessary pause in stakeholder engagement, the processes and novel status quo that emerged within the program have increased the fidelity, consistency, and availability of utility data across participating utilities, (which were known pain points for stakeholders when attempting to access utility data), and established the required foundation for future quality use case development and deployment.

3.1.1 Prioritization of Appendix B of the IEDR Whitepaper

Initially, Phase 2 program operations followed precedent set by the IEDR Order and actualized in Phase 1: stakeholder-centric use case design and subsequent data acquisition activities surrounding a previously identified catalogue of use cases³⁶. Due to data standardization, governance, and acquisition challenges among multiple disparate utility organizations, in April 2025, the IEDR Steering Committee directed IEDR development to focus on acquisition and availability of data identified in Appendix B of the IEDR Whitepaper³⁷ and the development of a corresponding Query Tool. On June 27, 2025, the IEDR Program Team and Steering Committee aligned on the program's updated approach to data acquisition and, as a result, began executing the updated approach in Q3 2025. By focusing on foundational data acquisition, standardized and integrated utility datasets were enabled, subsequently ensuring data consistency and quality, as well as promoting the integrity of long-term use case development.

Pivoting from use case-centric development in order to improve long-term platform viability involved significant operational restructuring and time expenditure, including the implementation of new program processes, working groups, and alignment and operationalization of processes among key program participants. The resultant governance structure increased predictability of program processes for acquiring, harmonizing, and operationalizing utility data, and ultimately generated novel efficiencies in the data acquisition process that also increased the holistic value of data transferred from the utilities to the IEDR.

³⁶ State of New York Department of Public Service, "Case 20-M-0082- Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data." Integrated Energy Data Resource (IEDR) Program Phase 2 Proposal. May 12, 2023.

³⁷ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Whitepaper Recommendation to Implement an Integrated Energy Data Resource, May 29, 2020.
<http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRetId={43298F6A-3CA4-435FBC9D-6DEF6F575836}>

Section 4 elaborates on specific data acquisition challenges, and the activities that were initiated and operationalized during Phase 2 to support foundational statewide data acquisition, standardization, validation, and coordination efforts throughout the program.

3.2 Phase 2 Public-Facing Platform Releases

Phase 2 public-facing releases occurred on a regular basis from April 2024 to April 2025 and included improvements in platform User Experience/User Interface (UX/UI), bug fixes, performance improvement, data gap amelioration, and additional data integrated into the existing platform's Electric Infrastructure Assessment Tool (EIAT) and Rate Plan Browser (RPB) tools. Details about prior releases can be found on the [IEDR Release Notes](#) page and the public view of the [IEDR Detailed Roadmap](#).

Given the program's shift to the prioritization of foundational data acquisition, the IEDR Program Team temporarily paused new releases to the public-facing IEDR platform in April 2025. Likewise, to support focus on the acquisition of foundational data and the development of the Query Tool, previously established use case development processes were also paused in conjunction with the initiation of the foundational data acquisition directive in April 2025.

Section 4 of this report details the platform development activities that supplemented public-facing releases during Phase 2, including the enhancement of existing user-facing tools, advancing data acquisition, and the development of the Query Tool and its respective functionality. As of the filing of this report, the Query Tool is projected to publicly launch in Q1 2027.

3.3 Phase 2 Stakeholder Engagement

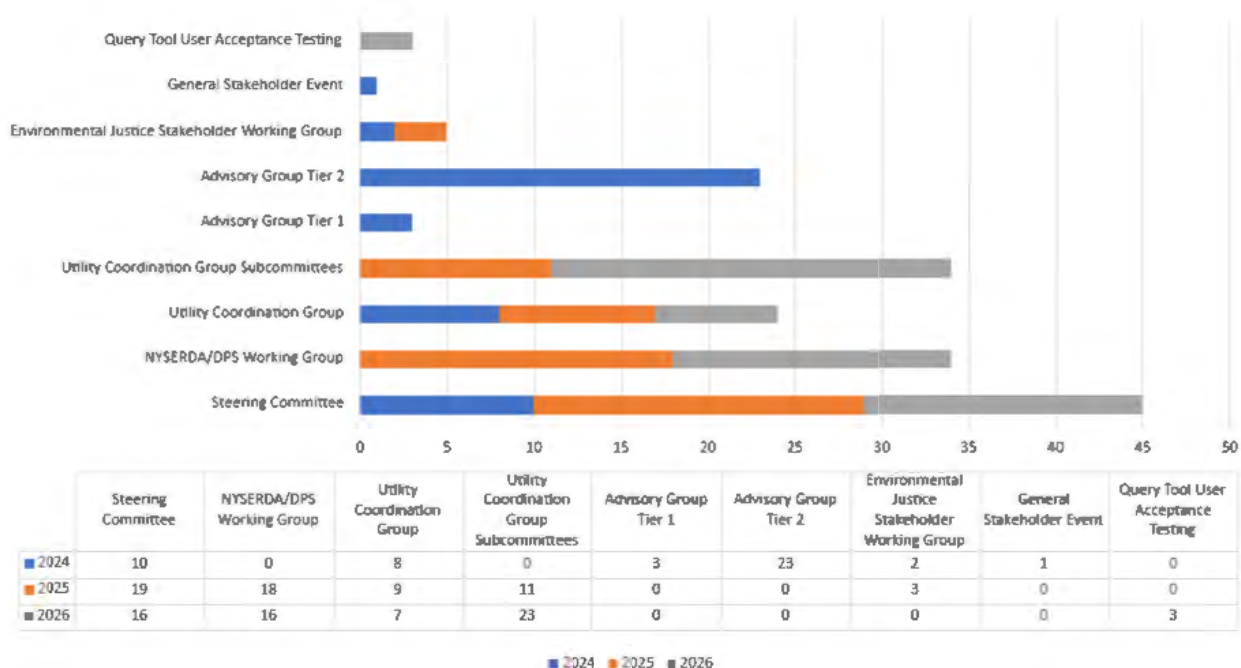
To accommodate coordination with participating utilities to acquire data documented in Appendix B of the IEDR Whitepaper³⁸ and re-sequence program priorities, on April 15, 2025, the IEDR Program Team, in consultation with the IEDR Steering Committee, temporarily paused non-utility stakeholder engagement activities. Paused stakeholder engagement activities included convening the IEDR AG and the IEDR EJWG Group, until further notice. However, throughout the remainder of Phase 2, the Program Team continued to leverage stakeholder inputs in the development of IEDR features. Phase 2 stakeholder engagement will be reactivated in the form of Query Tool User Acceptance Testing (UAT). More details on the Query Tool UAT are provided in Section 4.

³⁸ State of New York Department of Public Service, DPS Staff Whitepaper Recommendation to Implement an Integrated Energy Data Resource, Appendix B.

3.3.1 Summary of Phase 2 Stakeholder Engagement Counts

Prior to the decision to pause stakeholder engagement, the program engaged with stakeholders in tandem with specific use case and thematic use case development activities. Historical Phase 2 stakeholder activities, including narrative descriptions and engagement metrics are described below. The remaining active and anticipated Phase 2 stakeholder engagement activities in the form of Query Tool UAT and asynchronous communication channels are also described in this section.

Figure 2 - Volume Of Stakeholder Engagement Conducted in Phase 2 As of August 31, 2026



3.3.2 General Stakeholder Event

The IEDR Program Team held a General Stakeholder Event (GSE) on May 17, 2024, which was publicly promoted and open to the public. The audience included 109 attendees representing 72 organizations who interactively participated and provided feedback throughout the session. The IEDR Program Team presented an overview of Phase 1, provided a demo of IEDR MVP features, and reviewed the Ideas Portal³⁹ to encourage the submission of additional stakeholder feedback. The event also shared Phase 2 objectives, the status of use cases provided in the Phase 2 Proposal, and the framework for use case discovery and development anticipated to be used in Phase 2. The GSE ultimately increased stakeholder awareness and helped the Program Team gauge stakeholders' interests and sentiment.

³⁹ The Ideas Portal is a mechanism for gathering stakeholder feedback that is accessible from the "Connect With Us" drop down menu on the IEDR platform home page. For more details about the Ideas Portal, see section 2.5.1 of this report, or visit the Ideas Portal here: <https://iedr.ideas.aha.io/>

3.3.3 Steering Committee

Monthly Steering Committee meetings occurred from the beginning of Phase 2 until April 2025. The shift to foundational data acquisition, which included the development and sequenced delivery of data transfer specifications to the utilities, required increased engagement with the Steering Committee to review and approve data transfer specifications based on Appendix B of the IEDR Whitepaper.

Starting in April 2025, and instead of meeting monthly, the Steering Committee began meeting twice a month to discuss and decide on the advancement of data specifications and other key program decisions.

Phase 2 IEDR Steering Committee data acquisition activities include:

- Reviewing and approving or rejecting information requests regarding data availability and business logic before the IEDR Development Team sends them to UCG participants
- Reviewing information request responses from the utilities and either approving or deferring the creation of a new, or modification of an existing, data transfer specification and model to accommodate new data fields by the IEDR Development Team
- Reviewing and either approving or rejecting draft data transfer specification versions before the IEDR Development Team shares with UCG participants
- After the IEDR Development Team coordinates with UCG participants, performing a secondary review and approving or rejecting the final draft of the data transfer specification before it is finalized and enacted as the current version of the specification governing data transfers to the IEDR

This process ensures the IEDR Steering Committee has insight and input into the prioritization and content of data transfer specifications that dictate what data is available in the IEDR to support user queries and other analysis tools.

The IEDR Steering Committee met 10 times in 2024, 19 times in 2025, and as of August 31, 2026, 16 times in 2026.

3.3.4 NYSERDA/DPS IEDR Working Group

In conjunction with the shift to prioritizing foundational data acquisition, a biweekly NYSERDA/DPS IEDR Working Group was established. The cadence of the Working Group punctuated Steering Committee meetings and was designed to serve as a preparatory validation step, prior to bringing topics to the Steering Committee, and finally the UCG. The Working Group also discusses and prepares for regulatory dependencies that may have an impact on program operations.

The bi-weekly IEDR NYSERDA/DPS Working Group met for a total of 18 times in 2025 and as of August 31, 2026, has met a total of 16 times in 2026. The NYSERDA/DPS IEDR Working

Group is expected to continue to meet on a biweekly basis, punctuating both Steering Committee meetings and monthly UCG meetings throughout the remainder of Phase 2.

3.3.5 UCG

Phase 2 UCG operations maintained a monthly meeting cadence from the start of Phase 2 on April 1, 2024, until April 15, 2025. Once the decision to shift program priorities to focus on foundational data acquisition occurred, the IEDR Program Team temporarily paused engagement with the UCG from May 2025 until August 2025. This temporary pause in UCG engagement allowed the IEDR Program Team to create a new approach to engaging with the UCG that aligned with foundational data acquisition priorities, including the creation of UCG Subcommittee structures and governance approach, as well as the creation of specific tools and processes that support foundational data acquisition. After the shift to foundational data acquisition occurred and the necessary advancements in program processes were operationalized, the UCG resumed a monthly cadence in August 2025, with newly introduced UCG Subcommittee meetings occurring in between monthly UCG meetings.

3.3.6 Formation of UCG Subcommittees

As permitted by the IEDR Program Charter, the updated foundational data acquisition approach included the formation of UCG Subcommittees. The UCG Subcommittees are specialized committees that are designed to facilitate focused discussions, resolve technical challenges, and coordinate efforts among utility stakeholders to support the efficient and accurate collection of data required for the IEDR platform. The UCG Subcommittees were designed to meet in between monthly UCG meetings and offered a collaborative forum for utilities to work with the IEDR Development Team on the broader topics surfaced at the monthly UCG forums, to review the availability of utility data sets, and to collaboratively develop the IEDR data transfer specifications that support the continuous and efficient delivery of high-quality data as listed in Appendix B of the IEDR Whitepaper.

Initially, three subcommittees were established, each focusing on their own data pipeline: rate plan data, customer data, and network data; later a DER subcommittee was established. As the subcommittee structure evolves with program needs and as the program explores various new data categories in Appendix B of the IEDR Whitepaper, subcommittees may be added or changed beyond the initial data categories. The knowledge exchanged within these meetings helped establish the feasibility of obtaining Appendix B data sets and the ability to build queries to fulfill use cases.

The primary UCG met a total of 8 times in 2024, 9 times in 2025, and as of August 31, 2026, 7 times in 2026. The UCG Subcommittees met a total of 11 times in 2025, and as of August 31, 2026, 23 times in 2026.

3.3.7 Advisory Group

Continuing operative precedent set in Phase 1, initial Phase 2 AG structure and operation consisted of two separate groups or “tiers”. Tier 1 AG meetings functioned as large group sessions, focused on overall Program development, and were held quarterly. Tier 2 AG meetings functioned as small group sessions, focused on reviewing specific uses cases and software features; the cadence of Tier 2 AG meetings was based on use case groupings and the program development roadmap. Tier 1 and Tier 2 AG meetings were conducted in early Phase 2 and were paused to allow the IEDR Program Team to develop a revised approach to platform development and to address stakeholder concerns once the data acquisition priority was established in April 2025.

In 2024, the Tier 1 AG met a total of 3 times, and the Tier 2 AG met a total of 23 times. Tier 1 and Tier 2 AG activities were paused throughout 2025 and 2026.

3.3.8 IEDR Environmental Justice Stakeholder Working Group

Starting in Q4 2024, the IEDR Program Team facilitated a program level-setting session among the IEDR EJWG and familiarize members with the IEDR Program, platform, and program progress made to date. Following the first session, a post-session survey was distributed to capture feedback on Phase 2 use case priorities and identify net new use cases. The IEDR Program Team then hosted the second IEDR EJWG session. With the goal of intentionally collaborating on the survey experience and ensuring that feedback was adequately captured, the working group discussed the survey experience and additional feedback that may not have been captured in the survey. The group also discussed high-level use case prioritization concepts in the context of working group member goals. In Q1 2025, the IEDR Program Team reported back to the IEDR EJWG members on how their feedback, (gathered from the survey, the initial two sessions, the Ideas Portal, and any other captured conversation), was interpreted and incorporated into Phase 2 planning.

3.3.9 Phase 2 Query Tool User Acceptance Testing (UAT)

Throughout 2026, the Program Team prepared for Query Tool UAT with stakeholders, socialized UAT plans with the Steering Committee, and conducted preliminary rounds of UAT focused on the rate plan and community query tool module among internal program participants. Additional internal Query Tool UAT is planned throughout the remainder of 2026 and will culminate in Q1 2027. Internal UAT serves as a precursor to external stakeholder UAT, which aims to test all modules and data joins contained within the Query Tool; external UAT is currently projected to take place in Q4 2026 and Q1 2027. In line with the Commission’s directive to enable effective access to useful energy data, UAT seeks to confirm that Query Tool UI/UX will satisfy user’s needs, while ensuring that the Query Tool and data accessed from the Query Tool is accessible and meaningful to the broadest measure of stakeholders.

Targeting the public release of V1.0 of the Query Tool in Q1 2027, the IEDR Program Team will engage with IEDR stakeholders from the AG, Steering Committee, DPS, and the UCG throughout the remainder of 2026 and Q1 2027. The public release V1.0 will activate core datasets for query access and will include query templates (e.g., pre-built queries for common use cases with predefined filters and joins⁴⁰). Where possible, previous rounds of stakeholder feedback will be used when designing Query Tool features and query templates.

Stakeholder UAT is intended to validate usability, basic functionality, and readiness of the Query Tool framework and initial query modules for public release V1.0. The IEDR Program Team will collect feedback on existing features only and will not solicit input on the development roadmap. UAT is not intended to validate dataset completeness, support custom analytics requests, or serve as a performance benchmarking exercise. For more information on the upcoming Query Tool release, see Section 4 of this report.

3.4 Asynchronous Stakeholder Communication Channels

3.4.1 Ideas Portal

In addition to soliciting input via various stakeholder engagement groups and methods, a mechanism for gathering stakeholder feedback—the Ideas Portal (<https://iedr.ideas.aha.io/>) – was established in Phase 1 and continues to operate through Phase 2.

The Ideas Portal allows Stakeholders to:

- Submit ideas for new use cases and enhancement requests
- Provide feedback and suggestions regarding existing functionality
- Review and support ideas submitted by other users
- Help identify areas of broad stakeholder interest and value
- “Like” ideas submitted by other users to help call attention to ideas with broad stakeholder support

Feedback obtained through the Ideas Portal is reviewed, analyzed, and incorporated into prioritization processes for consideration when planning subsequent iterations of the IEDR platform. Additionally, analytics on stakeholder usage provide valuable insights into how the platform is being used and help identify areas for improvement and optimization.

As of August 2026, 164 ideas had been submitted through the Ideas Portal, including 97 submitted during Phase 1 and 67 submitted during Phase 2. Of these, 85 were reviewed to be feasible and of high value, added to the product backlog, and deployed. Additional ideas and enhancement requests are expected to continue informing future iterations of the IEDR Platform.

⁴⁰ “Joins” combine data from individual modules based on common attributes (e.g., by joining the rate plan and community-aggregated energy datasets, a user could explore which rates are active in a given location and how much energy is consumed under each rate).

3.4.2 Help Desk

The IEDR Help Desk supports users, stakeholders, and utility participants across NYS by providing a centralized mechanism for issue resolution, platform support, and multi-party coordination related to data access, tooling, and platform functionality. Since its launch in March 2023, the Help Desk has processed over 192 service requests from 27+ organizations with a 100% resolution rate.

Help Desk support activities include:

- Platform issue triage and resolution: identifying, reproducing, and routing platform defects (e.g., map rendering issues, download failures, filter/display bugs) to the engineering team
- Data quality assurance: flagging and coordinating resolution of data quality issues surfaced by users, including missing or incorrect asset records, serving as a quality gate between utility data submissions and public-facing outputs
- Data deposit and transfer coordination: supporting utilities with production data deposits, file naming conventions, delivery confirmations, and SFTP coordination
- Access management and authentication support: resolving login issues, Keycloak SSO problems, staging/UAT environment access, and permission configuration
- User and stakeholder inquiries: responding to questions about IEDR tools, data specifications, module functionality, and platform capabilities
- Onboarding and UAT support: supporting UAT cycles and new user/organization onboarding, with demonstrated surge capacity during major platform launches (Q2-Q3 2024 peak: 30 tickets)
- Enhancement request intake: tracking user feedback and feature requests to inform the product roadmap

The Help Desk also serves as an early-warning system for systemic issues — recurring ticket patterns, (e.g., login failures across multiple utilities, data deposit issues after specification changes), surface problems before they escalate. It also provides a documented audit trail of stakeholder interactions, which supports NYSERDA reporting requirements and demonstrates responsiveness to utility participants. The volume and theme of tickets directly inform engineering prioritization.

3.5 Reorientating Future Stakeholder Engagement

Throughout Phase 2, stakeholder engagement activities were intentionally re-sequenced to support foundational utility data acquisition, data transfer specification development, governance activities, and overall program delivery. As a result, Phase 2 stakeholder engagement was primarily conducted through the IEDR Steering Committee, UCG, UCG Subcommittees, and

targeted working sessions focused on data acquisition, platform development, and operational readiness.

Should additional IEDR development be pursued beyond Phase 2, NYSERDA recommends evolving stakeholder engagement activities to place increased emphasis on user needs, use case prioritization, capability design, and adoption. Future engagement activities could combine strategic direction from the Steering Committee with targeted outreach to specific user communities associated with priority use cases and platform capabilities. This approach would support continued alignment between IEDR development priorities, NYS policy objectives, and the needs of intended platform users while providing a structured process for evaluating and prioritizing future enhancements. Potential future stakeholder engagement activities may include:

1. Use case prioritization workshops aligned to regulatory proceedings, statewide initiatives, and program priorities
2. User-centered design workshops and concept validation activities
3. Targeted working groups focused on specific user communities or functional areas
4. UAT and pilot deployments for new platform capabilities
5. Demonstrations and outreach activities to increase awareness and adoption of IEDR capabilities
6. Continued use of the IEDR Ideas Portal and other feedback mechanisms to inform future platform enhancements

Targeted outreach to specific user communities based on regulatory proceedings, statewide initiatives, and program priorities, indicates the certainty of continued close collaboration with and operationalization of the IEDR Steering Committee.

4 Phase 2 Platform Development Summary

Phase 2 of the IEDR Program expanded development of New York's centralized statewide platform for the collection, integration, management, and access of energy and energy-related data from utility and non-utility sources. The platform provides users with centralized access to approved datasets, including publicly available data and aggregated or privacy-screened data, and supports the download of data outputs where permitted. Phase 2 development activities focused heavily on statewide data acquisition, standardization, validation, integration, and operational coordination necessary to support scalable long-term platform operations, development, and user-facing query functionality. As utility coordination progressed, the Program Team prioritized the establishment of repeatable and governed processes for acquiring, harmonizing, and operationalizing utility data across participating utilities.

4.1 Phase 2 Development Value

Throughout all regulatory requirements, the Commission has been clear that data quality and stakeholder trust in the quality of data in the IEDR platform are foundational priorities for the IEDR Program. The IEDR Order stated: "The Commission also agrees with DPS Staff's assertion that much of the IEDR's value will depend on the extent to which the State's energy stakeholders trust the IEDR as a reliable source of accurate information. Consequently, to establish and maintain that trust, the IEDR must be designed, implemented, and operated in a manner that ensures the integrity and accuracy of data stored within the IEDR."⁴¹ In addition, the Phase 2 Order stated: "Emphasis will be placed on extracting comprehensive energy data from existing systems and ensuring their swift provision to the IEDR. Central to Phase 2 activities is the refinement of data collection methodologies in order to bolster the platform's capabilities for scalable operations and enhanced analytical insights."⁴² A significant portion of the value established during Phase 2 has been driven through Appendix B data acquisition activities, including development of consistent statewide data models across participating utilities, implementation of automated data validation and operational data health reporting capabilities, and the establishment of secure and scalable infrastructure supporting ongoing data acquisition, integration, and platform operations.

Phase 2 development also focused on improving data integration, aggregation, and accessibility by aligning datasets into standardized and fit-for-purpose structures, enabling privacy-safe aggregation approaches, and supporting integrated querying across previously siloed utility and non-utility datasets. These efforts enable development of new energy insights and expand accessibility of statewide energy-related information through a new IEDR Query Tool and related platform functionality.

Together, these activities established a statewide operational data framework intended to support expanded query functionality, integrated insights, and additional user-facing capabilities over time. Without the completion of this foundational work, available utility data would flow inefficiently and in an unharmonized state from disparate utility systems, effectively depreciating the quality of potential data analytics, and replicating and aggregating existing problems in accessing utility data within a statewide centralized data platform that was intended to drive utility data access towards standardization; virtually rendering reliable data analysis at scale across utility territories impossible within the IEDR. The following sections summarize the foundational data, governance, infrastructure, tooling, and query functionality developed during Phase 2 of the IEDR Program.

⁴¹ State of New York Public Service Commission, Order Implementing an Integrated Energy Data Resource, 14.

⁴² State of New York Public Service Commission, Order Approving Integrated Energy Data Resource Phase 2 Budgets, 6.

4.2 Data Acquisition Challenges

During Phase 2 of the IEDR, data acquisition activities surfaced important complexities inherent in integrating diverse utility datasets. While these factors influenced re-sequencing, and schedules across workstreams, they concurrently led to significant advancements in data governance, standardization, and long-term platform scalability.

4.2.1 Utility Data Standardization and Alignment

Utility data is maintained across disparate source systems, each with its own formats, definitions, and governance structures. Aligning these datasets to the IEDR common data model required close coordination with utilities and iterative refinement of specifications. These dynamics were first observed in Phase 1, where initial timelines were influenced by the need to establish data sharing agreements and address delivery of confidential utility data to the IEDR. As customer data began to be received from utilities in Q1 2024, it became clear that datasets reflected differing schemas, quality, and levels of maturity across utility organizations. This provided valuable insight into the specific characteristics of each utility customer data feed, and highlighted the importance of developing a scalable, standardized approach. While early development required some utility-specific adjustments, these efforts directly informed stronger common frameworks and reusable patterns.

As a result, and in consultation with the IEDR Steering Committee, Phase 2 implementation priorities were reframed to focus more heavily on data acquisition governance, including the development of standardized specifications, validation processes, and coordinated approaches to improve data consistency, quality, and usability across participating utilities.

4.2.2 Utility Readiness and Implementation Progression

Utilities progressed through implementation at varying levels of readiness, reflecting differences in existing infrastructure and data pipeline maturity. In some cases, additional time was required to establish pipelines and align datasets with IEDR specifications.

This progression provided valuable insight into the range of starting points across utilities and helped inform more targeted utility coordination and data transfer specification approaches. As utilities advanced through these stages, the program gained a clearer understanding of implementation patterns, enabling more efficient coordination and improved support models for future datasets.

4.2.3 Data Quality and Validation Maturation

The introduction of enhanced validation requirements played a critical role in strengthening overall data quality. During initial onboarding, datasets frequently surfaced validation issues, which is consistent with the transition to more rigorous and standardized requirements.

These early validation cycles enabled utilities and the program team to identify and address issues at their source, leading to improved data integrity over time. While this required additional iteration during early data submissions, it represents a meaningful investment in establishing a high-quality, reliable data foundation that will support the long-term development of use cases.

4.2.4 Complexity of Data Requirements

Due to the differences in utility source systems, the IEDR data model and specifications were unable to fully align with existing utility data structures. This misalignment increased the effort required for mapping, transformation, and clarification of requirements, contributing to extended implementation timelines.

Efforts to map, transform, and clarify requirements provided important insights into how to better align specifications with operational realities and helped refine both the data model and implementation guidance. In instances where datasets required further development or were not yet in a fully integration-ready format, collaborative follow-up with utilities allowed for more complete and usable data over time.

4.3 Statewide Data Harmonization and Integration

Phase 2 development enabled statewide use of utility data through a common data model that supports more consistent aggregation, comparison, and reporting across utilities. By reducing variation in how participating utilities structure and submit their data, the platform improved the consistency and usability of statewide datasets and created a stronger foundation for reliable downstream analysis.

Beyond IEDR Program compliance, participating utilities also benefited from data harmonization and integration efforts, including better visibility into data quality, more repeatable and automated exchange processes, and lower operational effort associated with recurring transfers and reconciliations.

Together, these capabilities positioned the IEDR as a centralized statewide clearinghouse for utility data exchange, supporting New York energy programs and initiatives while making it easier to onboard additional utility and non-utility datasets over time. Phase 2 development reduced long-term integration complexity and established repeatable processes to support future platform operations, reporting, and data-sharing initiatives, and strengthened the IEDR as a standardized, governed, and scalable statewide data management platform that can support broader reporting, integration, and program needs over time.

Key outcomes of Phase 2 foundational data activities that enable statewide data harmonization and integration include:

- Improved consistency and reliability of statewide energy data
- Improved visibility into utility data quality and operational status

- Reduced long-term integration and maintenance complexity
- Reduced duplicative data exchange and reconciliation activities
- Improved readiness for future statewide data-sharing and modernization initiatives
- Established scalable infrastructure supporting future query, reporting, and integration capabilities

4.4 Phase 2 Foundational Data Acquisition Operations

Phase 2 development work required coordinated utility governance, development of standardized data structures and data transfer specifications, implementation of utility data acquisition and validation processes, establishment of repeatable integration and operational workflows, and continued advancement of data query functionality to support broader platform accessibility and use.

As the first statewide platform of its kind in NYS, acquiring and operationalizing utility data required significant coordination and effort across program participants. Relevant datasets were maintained by separate utilities across multiple operational and business systems using differing formats, structures, definitions, and governance processes. Before data could be transmitted to the IEDR platform, the Program Team worked collaboratively with participating utilities to identify available datasets, establish standardized data structures and specifications, define transmission processes, and support alignment on validation and operational requirements.

The approach to Phase 2 development transformed data acquisition from a series of point-in-time exchanges into a standardized, repeatable, and auditable process intended to support ongoing platform operations. This work established statewide utility data exchange capabilities supported by standardized utility data transfers, automated ingestion processes, validation reporting, and repeatable operational workflows. It also improved consistency of utility submissions and provided greater visibility into utility data quality and data management practices associated with datasets transmitted to the IEDR platform.

These activities also established the governance, security, permissions, and operational processes necessary to support ongoing statewide data acquisition and integration activities. Collectively, this work created the operational framework necessary to onboard, manage, and integrate a broad range of utility and non-utility datasets aligned to Appendix B data categories and broader statewide planning, operational, and policy needs.

Table 1 - Examples of Key Foundational Datasets

Examples of key utility datasets include:	Examples of non-utility datasets include:
• Customer usage and billing data • Rate and tariff data	• Geographic and parcel data • Environmental and DAC data

• Network and infrastructure data • Hosting capacity analysis data • Installed and Planned DER data • Grid planning-relevant data	• Land-use information
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4.5 Data Governance and Utility Coordination Accomplishments

Formal governance processes and coordination structures were established in Phase 2, through the Utilities Coordinating Group (UCG) and supporting subcommittees. The UCG provides a forum to develop and approve data specifications, establish implementation priorities, coordinate and address data issues with subject matter experts, review validation feedback and operational concerns, and manage timelines and approvals across participating utilities. The UCG structure included recurring working sessions and data-specific coordination activities intended to support specification alignment, operational consistency, and issue resolution. Coordination between the JU, DPS Staff, NYSERDA, and the Program Team helped support consistent implementation processes and operational alignment throughout Phase 2.

Before transmitting data to the IEDR platform, participating utilities worked with the IEDR Program and Development Team to identify available datasets through information requests, confirm what data could be released based on data classification, and map utility-specific data to standard formats and delivery methods. This approach addressed differences in utility systems, definitions, and file formats and established a single statewide process intended to support consistent submissions and regulatory transparency.

4.6 Phase 2 Appendix B Data Acquisition Metrics

Based on approved and in-flight data transfer specifications, the IEDR platform is currently on track to address approximately 76% of Appendix B data categories by the end of Phase 2, representing acquisition of approximately 92% of Appendix B data fields that are in existence to be acquired from utility or public data sources, subject to ongoing feasibility assessment. The table below summarizes the Appendix B data categories estimates by the end of Phase 2 development. During Program Team review, several data fields were evaluated and removed from data acquisition plans due to privacy and security constraints, rather than data availability.

Gray rows in the table below indicate data categories not currently planned for acquisition (e.g., forecasted data) due to data availability, standardization, feasibility, or data-sharing constraints. For a full list of data currently and projected to be in the IEDR within Phase 2, please refer to Appendix B of this report.

Table 2 - Appendix B Data Categories Phase 2 Data Acquisition Summary

Appendix B Category	# Appendix B Data Fields Identified	# Data Fields Acquired as of Filing	# Remaining Data Fields Planned for Acquisition	Total % Planned by End of Phase 2
Substation Details	6	6	0	100%
Substation Bus Details	7	7	0	100%
Substation Transformer Details	16	14	0	88%
Circuit Details	24	22	2	100%
Service Transformer Details	16	16	0	100%
Electric Service Point Details	22	15	4	86%
Electric Customer Details	17	14	2	94%
Electric Meter Details	10	10	0	100%
Gas Service Point Details	14	9	4	93%
Gas Customer Details	15	14	0	93%
Gas Meter Details	10	10	0	100%
Steam Service Point Details	13	8	4	92%
Steam Customer Details	15	14	0	93%
Steam Meter Details	10	10	0	100%
Grid Sensor Details	12	0	12	100%
Power Quality Event Details	6	0	6	100%
Installed DER Details	22	0	19	86%
Queued DER Details	20	0	19	95%
Forecasted DER Details	9	0	0	0%
Registered Electric Vehicle Details	15	0	15	100%
Forecasted Electric Vehicle Details	11	0	0	0%
Installed Electric Vehicle Charger Details**	26	0	25	96%
Forecasted Electric Vehicle Charger Details	18	0	0	0%
Registered ICE Vehicle Details	13	0	13	100%
Forecasted ICE Vehicle Details	9	0	0	0%
Existing Building Details	13	0	0	0%
Forecasted New Building Details	13	0	0	0%
Forecasted Building Modification Details	14	0	0	0%

Digitized Bulk Power Market Details	7	0	7	100%
Digitized Distribution Network Value Details	9	4	4	89%
Distribution Investment Plan Details	9	9	0	100%
Distribution NWA Opportunity Details	11	11	0	100%
Metadata for Digitized Documents & Other Unstructured Data Items	9	0	0	0%

4.7 Data Transfer Specifications and Metadata Management

To support scalable data intake across multiple utilities and datasets, Phase 2 established standards for data transfer specifications, supporting metadata, and change control, including:

- **Framework Documentation:** a program-level framework document that defines how utilities exchange data with the IEDR, including interface requirements, required supporting information (metadata), versioning and change management, and data quality checks. This document applies across all data categories.
- **Single Source of Truth for Specifications:** Phase 2 development adopted a single authoritative source for data models, field definitions, required metadata, and pipeline configuration inputs. This reduced inconsistent interpretations between utilities and the Program Team and improved alignment across technical and governance work. The standardized specification and metadata framework established during Phase 2 supports more repeatable onboarding of future datasets and integrations while reducing operational complexity associated with utility-specific implementations and one-off data exchanges
- **Automated Documentation and Artifacts:** the Program Team implemented automation to generate data transfer specifications, entity-relationship diagrams (ERDs), and metadata and validation documentation from the authoritative source. This reduced manual work and improved consistency.
- **Version Control and Traceability:** specifications and related artifacts were maintained under version control to track changes over time and align approved specifications with production pipelines. This supports traceability for review and audit purposes.
- **Testing and Change Management:** a testing environment and end-to-end validation process supported controlled rollout of specification updates. This enabled continuous improvement while managing operational risk.

4.8 Data Transfer Process

Utilities must electronically transfer data to the IEDR platform promptly and accurately in accordance with IEDR data transfer specifications. Data is encrypted in transit between utility systems and the IEDR and encrypted at rest once received. Data deposits from the utilities leverage secure industry standards and best practices. The data is then processed through an orchestrated workflow of cleansing and normalization steps before it is stored in compliance with platform requirements.

4.9 Data Quality, Validation, and Refresh Processes

In addition to the standardization process described above, Phase 2 development also built data quality checks directly into the data intake process. The Program Team defined automated rules that test each submission for completeness, validity, uniqueness, consistency, timeliness, referential integrity, and accuracy. Data validation is performed and recorded at the field, record, and dataset levels. These data quality, validation, and refresh processes are in service of the Commission's directive to ensure that the IEDR is a reliable source of accurate information for stakeholders.

Data quality and validations checks run automatically with each file submission (rather than through periodic manual reviews). This supports early detection of issues, consistent measurement over time, and timely feedback to utilities.

Phase 2 development also delivered centralized dashboards that show data submission status and validation results. These dashboards support:

- Tracking submission and validation status by utility
- Tracking submission and validation status by data category
- Reviewing validation results and trends over time
- Identifying recurring data quality issues
- Measuring improvements after corrections are made
- Testing submissions in a non-production environment before release

Centralized dashboard reporting enables shared accountability for data quality. Key datasets supporting the IEDR platform are updated on defined refresh cadences based on the applicable data category and operational requirements. Data quality and validation checks are performed continuously as updated datasets are received and processed.

Table 3 - Key dataset update and refresh cadence

Data type	Frequency of Updates
Rate & Tariff	Ad Hoc: within 48 business hours of published rate update

Customer Usage & Billing	Daily
Network and Infrastructure	Annually
Hosting Capacity Analysis	Annually
Installed and Planned DER	Monthly

4.10 Platform Infrastructure

4.10.1 Security and Access Controls

The current IEDR Platform Administrator, E Source’s System and Organization Controls 2 (SOC2) Type II information security program is designed to support the rigorous cybersecurity requirements associated with utility and NYS data management. These controls support continuous monitoring, risk mitigation, and comprehensive audit processes that help safeguard sensitive utility data and support secure data exchange within the IEDR platform environment. The Type II attestation provides evidence-based assurance of both control design and operating effectiveness over an extended audit period.

The program includes controls relevant to the security, confidentiality, and processing integrity of sensitive utility data, including governance and risk management, access control, encryption and data protection, network and endpoint security, vulnerability and patch management, incident response and business continuity, secure software development, and personnel security.

4.10.2 Cloud Infrastructure and Scalability

The IEDR platform utilized cloud-based infrastructure designed to support and secure ingestion, storage, processing, and querying of utility and non-utility datasets at statewide scale.

The platform architecture is designed to provide:

- Scalable compute and storage resources to accommodate growing data volumes and users
- High availability and resiliency to support reliable platform operations
- Elastic resource allocation to support changing processing and query demands
- Secure operational controls aligned to utility and state requirements

This infrastructure supports continued platform growth as additional datasets, users, and query capabilities are introduced over time.

4.10.3 Data Processing Environment

The IEDR platform leverages a governed data processing environment designed to support statewide data harmonization, validation, aggregation, and query serving across multiple participating utilities and data sources.

The data processing environment enables the platform to produce consistent, validated, and privacy-protected datasets suitable for centralized querying and future expansion of platform capabilities, and supports:

- Standardized ingestion and transformation of utility and non-utility datasets
- Harmonization of disparate source data into common statewide data structures
- Automated validation and data quality monitoring
- Privacy-preserving aggregation and controlled data access
- Traceability and auditability of data processing activities.

4.11 Data Tooling and Query Functionality

During Phase 2, the IEDR Program advanced both existing user-facing tools and the foundational data capabilities needed to support expanded self-service access to statewide energy data. Between April 2024 and April 2025, incremental updates to Phase 1 tooling were released to improve usability and user experience. Beginning in April 2025, public release activities were intentionally re-sequenced to prioritize utility data acquisition, validation, and integration activities necessary to support the next major user-facing platform enhancement: the IEDR Query Tool.

During Phase 2, the Program Team continued enhancing existing user-facing tools, including the Electronic Infrastructure Assessment Tool (EIAT) and Rate Plan Browser (RPB), while also advancing the underlying data acquisition, harmonization, validation, and integration processes necessary to support modular query functionality. The following sections summarize enhancements to existing tools, development of the new Query Tool, and the phased release approach supporting future public availability.

4.12 Existing and Enhanced Data Tools

4.12.1 Electronic Infrastructure Assessment Tool (EIAT)

The EIAT is an interactive geospatial tool within the IEDR platform that enables users to explore detailed energy-related datasets across NYS, including hosting capacity, DER deployment, environmental constraints, land and property information, and regional boundaries. The tool is designed to support DER developers, local governments, utilities, and other stakeholders in identifying and evaluating feasible locations for solar, storage, and EV charging projects through integrated mapping, filtering, and data export capabilities.

During Phase 1 and continuing through Phase 2, the IEDR Program Team released a series of enhancements to the EIAT to improve statewide visibility into hosting capacity, DER deployment, interconnection activity, and site assessment information. Subsequent enhancements expanded available environmental, land-use, community, and property assessment layers

intended to support DER siting and infrastructure planning activities. Additional improvements included expanded hosting capacity map functionality, improvements to usability and filtering, integration of electrification load serving capacity information, and ongoing updates to support statewide data consistency and user accessibility. Release notes throughout Phase 2 also documented incremental interface and functionality improvements intended to improve navigation, map interaction, data display, and export capabilities. Detailed EIAT release notes can be found here: [Release Notes | IEDR | New York State's Integrated Energy Data Resource](#).

4.12.2 Rate Plan Browser (RPB)

The RPB is a centralized tool that provides users with searchable, filterable, and machine-readable access to electric, gas, and steam utility rate plans across participating NYS utilities. The RPB enables stakeholders to compare tariffs, review eligibility criteria and rate structures, access associated tariff documentation, and export structured rate data without manually reviewing utility tariff PDFs or individual utility websites.

During Phase 1 and Phase 2, the IEDR Program Team continued enhancement of the RPB. Initial releases focused on enabling users to search, filter, and compare utility rate plans and tariff attributes through a consistent statewide interface. Throughout Phase 2, incremental releases improved RPB usability, filtering, navigation, and export functionality. Enhancements included updates to table functionality and column management, improvements to tariff search and filtering capabilities, expanded visibility into tariff attributes and rate plan characteristics, and continued refinement of machine-readable tariff data structures. These updates were intended to reduce reliance on manual tariff PDF review and improve accessibility of utility rate information for stakeholders and platform users. Detailed RPB release notes can be found here: [Release Notes | IEDR | New York State's Integrated Energy Data Resource](#).

4.13 Query Tool

The Query Tool is the next major user-facing capability under development within the IEDR platform and is intended to serve as the primary self-service interface for accessing statewide energy datasets. It is designed to provide users with a flexible, single interface to explore, filter, visualize and export available public datasets through modular query functionality.

Unlike existing purpose-built tools such as the EIAT and RPB, the Query Tool provides a single user experience that adapts to each dataset and allows for greater flexibility to join and explore datasets through configurable query workflows. Development of the Query Tool was intentionally sequenced alongside utility data acquisition and validation activities to ensure the initial Query Tool public release is supported by sufficiently operationalized datasets. As a result, the Query Tool was not yet publicly available at the time of filing this report. As of the time of this filing, the Query Tool is projected to be released to the public in Q1 2027.

The Query Tool is designed to serve a deliberately wide audience, including:

- NYS agencies and regulators conducting policy analysis, program design, and regulatory oversight
- Program implementers, program administrators, and demand-side management contractors/aggregators evaluating geographic opportunities, customer segments
- Researchers and academic users conducting load, equity, electrification, and decarbonization studies
- Market participants and third-party solution providers analyzing aggregated geographic, rate, and hosting capacity trends to inform market assessments and identify potential opportunities
- Public users accessing publicly releasable, aggregated, privacy-protected views of statewide energy data

In every case, the Query Tool's design intent is the same: provide the right level of data, to the right user, with the right privacy controls, on a self-service basis.

Table 4 - Core Query Tool Capabilities

Capability	Description
Governed Data Catalog	Documents available datasets, metadata, refresh cadence, coverage, and access requirements
Configurable Query Builder	Allows users to select datasets, apply filters, and define query parameters
Integrated Results Exploration	Supports tabular, time-series, and geospatial visualization of query outputs
Query Templates	Provides predefined query workflows aligned to common stakeholder needs; registered users can save templates to their profile
Privacy and Access Controls	Automatically enforces state-approved privacy protections and role-based access requirements

4.14 Query Tool Modules

The architecture of the Query Tool allows for inclusion of datasets through Query Modules. Each Query Module defines and exposes an available set of filters and a configuration of the viewable results to support dataset specific records and fields. This architecture allows for self-service selection of data while preserving security, performance, and ease of use.

The following sections summarize the primary focus, inflight supporting datasets, and example functionality associated with each Query Module. Rates, customer, network, and DER datasets, and the query modules were prioritized because these represent foundational datasets already incorporated into the IEDR platform and available to support initial query functionality at the time of this report. Future anticipated modules as part of Phase 2 are summarized at the end of this section.

The IEDR data models enable query modules not only to display a target dataset, but also to incorporate related information through joins with other datasets. This capability is available across all query modules and is illustrated through examples such as integrating Rate Plan data into the Community Scale Energy Query Module and Customer data into the Network Query Module.

4.14.1 Rate Plan Query Module

The Rate Plan Query Module expands and consolidates functionality previously provided through the IEDR RPB, which is anticipated to be sunset as RPB functionality transitions into the broader Query Tool environment. This evolution enables utility rate and tariff data to be accessed as centralized, structured, and machine-readable information within a unified query interface and allows rate data to be joined with other available datasets, including aggregated customer and community energy data. Integrating RPB functionality into the Query Tool supports more flexible and scalable analysis, planning, and decision-making activities while reducing reliance on manual review of tariff PDFs, utility-specific websites, and standalone tool interfaces.

Table 5 - Rate Plan Query Module Componentry

Primary Datasets: • Utility-provided rate and tariff data	
Key Filters / Attributes Filter by: • Utility • Service Type (Electric/Gas) • Customer Class • Effective and Cancellation dates • Charges (e.g., demand, delivery) • Retail Supply Eligibility	Example Query Functionality • Identifying active rate plans during a given period • Comparing rate offerings across utilities and customer classes • Evaluating availability of TOU or demand-based rates • Supporting rate oversight and comparative analysis • Exporting structured rate data for external analysis
Relevant Phase 2 Use Case Themes • Utility Rate Plan Access	

4.14.2 Community Scale Energy Query Module

The Community Scale Energy Query Module provides aggregated energy usage summaries for New York communities using customer billing and usage data aggregated in accordance with applicable DAF privacy screening and regulatory requirements. The module is intended to support community-scale energy analysis, statewide planning, and policy evaluation through standardized and privacy-preserving access to aggregated energy consumption information.

Table 6 - Community Scale Energy Query Module Componentry

Primary Datasets • Utility-provided customer usage and billing data	
Key Filters / Attributes • Supported geographic levels include zip code, county and municipality • Supported time resolutions include monthly and annual Filter by: • Geography • Year / Month • Utility • Customer segment • Commodity type (Electric / Gas / Steam)	Example Query Functionality • Tracking aggregated community energy consumption and associated contributing customer account trends over time • Comparing aggregated usage and customer counts across utilities or geographies • Exporting aggregated datasets for external analysis and reporting • Supporting statewide planning and policy analysis
Relevant Phase 2 Use Case Themes • Community Energy Planning • Customer Data Access and Privacy Management (Aggregated data)	

4.14.3 Network/DER Query Module

The Network/DER Query Module provides tabular and geographic access to distribution network and DER-related datasets intended to support hosting capacity review, DER siting activities, and infrastructure planning. The module presents hosting capacity information associated with utility grid assets in a searchable and filterable format that enables users to identify and prioritize potential locations for DER deployment and electrification-related projects. The Network/DER Query Module builds upon functionality currently available through the EIAT while introducing additional query, filtering, and export capabilities through the IEDR Query Tool framework.

Table 7 - Network/DER Query Module Componentry

Primary Datasets • Utility-provided network and DER data • Public land use and topological datasets

Key Filters / Attributes Filter by: • Utility • Geographic location • Circuit or feeder identifiers • Available hosting capacity • DER technology type • Existing and planned DER installations • Interconnection-related attributes • Grid asset characteristics	Example Query Functionality • Identifying circuits with available hosting capacity • Evaluating geographic areas for potential DER deployment • Reviewing existing and planned DER activity • Supporting electrification and infrastructure planning activities • Comparing hosting capacity information across utilities or regions • Exporting network and hosting capacity information for external analysis
Relevant Phase 2 Use Case Themes: • DER Market Expansion and Installation Efficiency • DER and Renewable Integration • DER Customer Engagement • Integrated EV and Building Electrification • Utility Market Operations	

4.14.4 Energy Insights Query Module

The Energy Insights Query Module provides aggregated, privacy-preserving analytics across integrated utility datasets intended to support statewide energy analysis, community insights, and data-driven planning activities. The module expands upon the Community Scale Energy Query Module by integrating multiple utility datasets to support broader geographic and cross-data-set analysis.

Table 8 - Energy Insights Query Module Componentry

Primary Datasets • Utility-provided rate, customer usage and billing data • Available network and DER datasets where operationalized • Public land use datasets	
Key Filters / Attributes The module is intended to support: • Community and geographic energy analysis • Comparative utility analysis • Identification of trends across integrated datasets • Geographic analysis • Export of aggregated insights	Example Query Functionality • Comparing energy usage and rate characteristics across geographies • Evaluating relationships between energy usage and DER activity • Supporting planning and policy analysis using integrated datasets • Identifying geographic trends and patterns across utilities • Exporting aggregated analytics for external analysis and reporting

Relevant Phase 2 Use Case Themes:

- Community Energy Planning
- Customer Data Access and Privacy Management
- Data-Driven Clean Energy Strategy
- Inclusive Energy Access & Equity

Since utility implementation scheduled and data readiness vary across data categories, some Energy insights functionality may initially be available only for portions of NYS where supporting datasets have been successfully acquired and validated. Proposed Phase 2.5 activities would focus on expanding these capabilities and datasets (e.g., additional visualization capabilities, added demographic data) toward broader statewide coverage.

As additional Appendix B utility and non-utility datasets operationalize within the IEDR platform, future Query Tool enhancements may be delivered either through expansion of existing query modules or through development of new standalone modules where distinct functionality, data structures, or user workflows warrant dedicated query capabilities. See Section 5 for proposed Phase 2.5 expansion areas.

4.15 Phase 2 Use Cases Addressed

The IEDR Query Tool release will introduce additional self-service user functionality that advances delivery of Phase 2 use case expansion in alignment with the Order’s expectation that “In Phase 2 of the IEDR program, which is expected to last 30 and 36 months, the IEDR’s capabilities will be expanded with the addition of approximately 40 use cases, building on the successful implementation and operation of Phase 1.”⁴³

To support Phase 2 planning and sequencing, the Program Team refined this broader objective into a working portfolio of 31 proposed Phase 2 use cases⁵ for detailed evaluation, prioritization, and implementation assessment. Across these 31 proposed use cases, Phase 2 Query Tool development and associated data acquisition activities are anticipated to fully enable 7 use cases (23%) and partially enable an additional 18 use cases (58%) by the end of Phase 2. Collectively, this represents progress toward enabling approximately 81% of the evaluated Phase 2 use case portfolio. Appendix A below contains a breakdown of use cases from the Phase 2 Proposal enabled or partially enabled in Phase 2, including details about outstanding, high-level requirements that must be met to complete each partially achieved use case during future development.

Partial enablement of a use case reflects instances where foundational datasets, query functionality, or core platform capabilities are expected to be available by the end of Phase 2,

⁴³ State of New York Public Service Commission, Order Approving Integrated Energy Data Resource Phase 2 Budgets, page 5-6.

while full realization of the use case will require additional data acquisition, authorization mechanisms, analytics functionality, or future module development beyond current Phase 2 scope.

This phased level of delivery reflects the Program Team’s intentional prioritization of statewide foundational data acquisition, harmonization, and platform readiness, that was informed by challenges in data acquisition that led to the necessary resequencing of development priorities during Phase 2. By focusing first on establishing the underlying data foundation and modular query capabilities, the IEDR platform is positioned to support continued expansion of use case functionality over time and provide the scalable foundation necessary to advance the broader use case objectives contemplated by the Order.

NYSERDA notes that additional potential use cases, including those beyond the catalogue of IEDR use cases that were identified in the Phase 2 Proposal may be realized through further development of the IEDR Query Tool by the end of Phase 2 (e.g., functionality in the Energy Insights module could support a grid planning use case, etc.). However, the actualization of those additional potential use cases is dependent on emerging utility data availability and quality. If additional use cases become available, the IEDR Program Team will provide public notification and details through release notes, the IEDR Phase 3 Proposal (if approach to bifurcate final Phase 2 program reporting is approved), and the IEDR Quarterly Reports.

4.16 Projected Program Activities Through March 31, 2027

Projected program activities after the filing of this report in September 2026, through March 31, 2027, will continue to focus on advancing foundational data acquisition, platform functionality, and stakeholder-aligned data development.

4.16.1 Data Transfer Specification Development and Data Acquisition

The IEDR Program Team will continue progressing Network Load, DER, Customer Programs, Power Quality/Grid Sensors, and EVSE data transfer specifications through Steering Committee review and approval, while completing production data transfers with utilities. In parallel, new specifications for Bulk Power, EV Registration, and ICE Registration are projected to be drafted, socialized, and advanced through the same development and approval lifecycle. These activities build on the established data acquisition framework, which includes drafting, review, testing, and acceptance processes aligned with program governance and stakeholder input.

4.16.2 Utility Coordination Group (UCG) Engagement and Alignment

Ongoing engagement with the UCG will continue to support data specification development, data acquisition, and issue resolution. The UCG will remain a primary forum for coordinating data submissions, aligning on implementation timelines, and addressing technical and operational challenges associated with utility data integration. UCG subcommittees will continue to facilitate focused discussions on specific data categories, enabling more efficient resolution of

data definition, quality, and integration issues, and supporting consistent implementation across participating utilities.

4.16.3 Pipeline Operations, Data Monitoring, and Quality Improvement

The remainder of Phase 2 will also include ongoing management of established data pipelines, including monitoring data deposits, validation outcomes, and overall pipeline performance. The Program Team will continue to implement and refine data quality controls, using dashboards and reporting to identify issues, track resolution, and improve data completeness, consistency, and reliability. These efforts support the sustainability of the data ingestion process and ensure that datasets are aligned and continue to align with common standards and fit for use within query tool modules and other platform functionality.

4.16.4 Coordination with Grid of the Future (GOTF)

As part of planned activities through the remainder of Phase 2, the IEDR Program will engage with the Grid of the Future (GOTF) initiative to explore opportunities for alignment between potential future phases of the IEDR and GOTF capability areas that have been identified as having an impact on NYS achievement of Climate Leadership and Community Protection Act (CLCPA) goals.

These discussions are intended to be exploratory and will inform future planning rather than establish defined scope commitments. Through this process, the program will assess the role that IEDR can play in enabling key GOTF capabilities, particularly within the Digital Capability domain, where standardized, high-quality data and shared data infrastructure are essential. This collaborative approach will ensure that IEDR continues to evolve in a manner that is consistent with broader state-level initiatives.

4.16.5 Query Tool Development and Public Release

Remaining Phase 2 activities include the public launch of the IEDR Query Tool and subsequent releases of production-level data accessible within the Query Tool. Initial releases will focus on enabling access to core datasets and supporting predefined and user-configurable queries, additional modules are anticipated to be introduced over time as new datasets are acquired, validated, and integrated into the platform.

4.17 Query Tool Public Release 1.0

Query Tool Public Release 1.0 represents the first public release of modular self-service functionality within the IEDR platform. Because rates, customer, network, and hosting capacity datasets represented the most mature and operationalized utility data categories during Phase 2, the initial IEDR Query Tool Public Release 1.0 focuses on functionality leveraging these datasets. The Query Tool Public Release 1.0, planned for Q1 2027, is intended to provide centralized access to harmonized datasets, cross-dataset querying, filtering, visualization, and

export capabilities using currently available and validated datasets across selected utility data categories.

Table 9 - Initial Query Tool Public Release 1.0 modules and limited cross-data-set querying capabilities

1.0 Query Modules	1.0 Cross-Data Set Queries
• Rate Plan • Community Scale Energy • Network/DER	• Customer and Rate Plan data • Network/DER and Customer data

This initial release reflects the phased delivery approach adopted during Phase 2 and provides the operational foundation for incremental expansion of additional modules, datasets, and cross-data-set functionality as data readiness continues to advance.

4.17.1 Query Tool Release Strategy and Feedback

The Program Team adopted an incremental release approach aligned to dataset maturity, validation readiness, and phased operationalization of utility and non-utility data. Initial Query Tool releases prioritize datasets with approved specifications, established validation processes, and sufficient operational readiness to support reliable public query functionality. This phased release approach supports introduction of additional query modules, cross-data-set functionality, and integrated datasets over time as additional utility and non-utility data become operationalized and validated within the IEDR platform.

To support operational readiness and stakeholder feedback, the IEDR Program Team utilizes a phased UAT approach prior to public release of new Query Tool functionality. This approach includes internal UAT activities involving the IEDR Steering Committee and Program Team to be completed by end of Q1 2027, followed by external UAT activities involving participating utilities and selected external stakeholders that were previously engaged in the IEDR Program to be completed in Q1 2027, before the launch of the Query Tool Public Release 1.0.

The UAT process is intended to support validation of functionality, usability, data presentation, and operational readiness prior to broader public availability. Following the public release, the IEDR Ideas Portal and other stakeholder feedback mechanisms will continue to be used to capture ongoing user feedback, enhancement requests, and future functionality considerations.

5 Proposed Phase 2.5 Transitional Development Period

Phase 2.5 is proposed as a one-year transitional development period following Phase 2. This shorter, targeted development window would allow the IEDR program to complete and stabilize priority Phase 2 workstreams, validate production utility data submissions, enhance selected

Query Tool capabilities, and develop a more detailed basis for the future potential Phase 3 proposal.

The proposed Phase 2.5 would avoid a discontinuity between Phase 2 and potential future development while ensuring that subsequent IEDR investments are informed by validated data, defined objectives, implementation experience, and clearly identified dependencies. Proposed Phase 2.5 work is organized around three objectives: Rate Analytics, Energy Insights, and IEDR Platform Core Capabilities. This objective-based structure reflects the program’s transition from foundational data acquisition toward outcome-oriented implementation and supports prioritization of activities that can be completed or materially advanced within a one-year period.

The proposed Phase 2.5 would also provide the opportunity to complete select remaining Appendix B priorities and advance targeted enhancements identified through Phase 2 implementation. These enhancements reflect areas where stakeholders identified additional value beyond the original Appendix B framework, including expanded data acquisition, analytical capabilities, and supporting platform foundations. The table below summarizes the primary data activities proposed for Phase 2.5.

Table 10 – Proposed Phase 2.5 Data Acquisition Activities

Phase 2.5 Data Category	Summary
Installed Electric Vehicle Charge Details	Complete any remaining data acquisition for 25 of 26 (96%) associated data items in Appendix B
Existing Building Details	Complete data acquisition for 13 of 13 (100%) associated data items in Appendix B
DER Details	Expand dataset beyond Appendix B requirements to support initiatives like GOTF
Utility Rates	Refine data model to support rate analytics capabilities, including rate comparison and bill impact analysis
Energy Program Framework	Define framework for energy programs that can connect to assets and accounts across applicable IEDR data models
Non-Utility Data	Finish acquiring any remaining Appendix B non-utility data, and refresh non-utility data (e.g., parcel data) as required to maintain functionality of the EIAT and Query Tool

Collectively, these data acquisition and enhancement activities establish the foundation necessary to support the broader Phase 2.5 workplan. The following organizing framework describes how these foundational data investments will be leveraged.

5.1 Phase 2.5 Organizing Framework

The Phase 2.5 workplan is designed to balance three program needs: maintaining the existing IEDR platform; completing and refining priority datasets and user-facing tools; and developing the scope, value case, and implementation roadmap for potential Phase 3 activities. Organizing

the work by objective, rather than by individual data specification, aligns related data, platform, and governance activities around intended outcomes and provides a disciplined basis for stakeholder engagement and implementation planning.

5.1.1 Objective 1: Rate Analytics

The Rate Analytics objective would build on the statewide rates data foundation and initial Query Tool functionality established during Phase 2. Phase 2.5 would use production utility rate, billing, and customer data to assess and refine the Rates data model, evaluate its integration with related IEDR datasets, and determine the extent to which the available data foundation can support future rate analytics, bill impact analysis, affordability objectives, and other customer-facing analytical capabilities.

This work is expected to be a targeted refinement rather than a major redesign. The emphasis would be on enhancing consistency across related data sources, identifying any data model or integration enhancements needed to support analytical capabilities, and defining requirements for rate comparison, bill impact analysis, and cost-planning and other customer focused tools.

Table 11 – Rate Analytics Objectives

Workstream	Phase 2.5 Focus	Expected Output / Decision Point
Energy Cost Analysis	Define rate and bill impact analysis requirements, assess data readiness, and validate supporting analytics methodologies.	Agreed-upon requirements and validated approach for future rate analytics and bill impact tool capabilities
Rates Data	Develop, integrate, test, and refine Rates specification Version 5 (V005) data foundations and associated Query Tool functionality.	Production-ready Rates V005 dataset and enhanced Query Tool capabilities supporting future cost-planning and rate analytics functions.

5.1.2 Objective 2: Energy Insights

The Energy Insights objective would continue and extend Phase 2 data acquisition and activation work by integrating utility and non-utility datasets into Query Tool modules that support planning, program analysis, and clean energy implementation. The data categories grouped under this objective support a common analytical purpose: identifying load, infrastructure, customer, community, and program characteristics that can inform clean energy investment, stakeholder analysis, and statewide planning.

Phase 2.5 would provide additional time to complete or materially advance data workstreams that began late in Phase 2 or require additional validation before broader platform use. These activities would also maintain the relevance and analytical utility of existing Energy Insights capabilities by refreshing supporting non-utility datasets and expanding the context available through the platform.

Table 12 – Energy Insights Objectives

Workstream	Phase 2.5 Focus	Expected Output / Decision Point
DER Data	Advance DER specification development, implementation, and Query Tool enhancements while assessing future DER opportunities.	DER specification Version 2 (V002) implementation and expanded DER analytical capabilities.
Buildings Data	Develop buildings data foundations, onboard utility data, and deploy supporting Query Tool functionality.	Buildings dataset integrated into IEDR and available through a Buildings Query Tool module.
Non-Utility Data	Refresh, integrate and expand Appendix B non-utility data, and other non-utility datasets such as parcel data that support the EIAT and the Query Tool.	Expanded non-utility data resources available to support planning and analytical objectives.
EVSE Data	Acquire, validate, and integrate EVSE datasets and evaluate Query Tool integration opportunities.	EVSE data available within IEDR and accessible through user-facing tools where feasible.
Power Quality / Grid Sensors Data	Assess usability and value of power quality and grid sensor datasets for current and future analytical needs.	Recommendation regarding future incorporation of power quality and grid sensor data within IEDR.

5.1.3 Objective 3: IEDR Platform Core Capabilities

The IEDR Platform Core Capabilities objective includes the operational, governance, data quality, access, and planning activities necessary to make Phase 2.5 outputs reliable, secure, and scalable. This objective includes baseline platform operations and maintenance, as well as

foundational improvements that would determine how effectively the platform can support expanded program objectives and capabilities in any future phase.

Core capability work would focus on improving confidence in IEDR data, establishing common dimensions for integrating datasets across the platform, and addressing policy, governance, security, and access requirements before committing to larger-scale implementation. These activities would also produce the planning inputs needed to support future Commission consideration of Phase 3 scope, timing, and value.

Table 13 – IEDR Platform Core Capabilities Objectives

Workstream	Phase 2.5 Focus	Expected Output / Decision Point
Data Quality and Interoperability	Advance specification refinement, interoperability testing, governance, and data quality improvements.	Improved data quality controls and interoperability framework supporting future platform expansion.
Bulk Data Support	Assess program needs and requirements, governance considerations, and requirements for large-scale data access capabilities.	Recommended approach and roadmap for bulk data access in Phase 3.
Role-Based Access	Scope and design a pilot for enhanced role-based access management.	Readiness to assess pilot findings and that will feed into recommendations for future data access expansion.
Operate and Maintain Platform	Support day-to-day platform operations, data pipelines, user support, security, and maintenance activities.	Stable and supported IEDR platform enabling successful delivery of all Phase 2.5 workstreams.

5.2 Phase 2.5 Workplan Dependencies and Risks

The proposed Phase 2.5 workplan includes several implementation dependencies and risks that will be actively managed through established program governance, utility coordination, and data quality processes. Successful execution of the Phase 2.5 workplan will depend on continued progress in utility data onboarding, data validation, interoperability, and resolution of identified data quality issues. Phase 2 established standardized data specifications, monitoring capabilities,

validation processes, and governance forums that provide mechanisms to identify, prioritize, and address these challenges as they arise.

Certain workstreams, particularly those associated with expanded data access, bulk data support, and role-based capabilities, will also require continued evaluation of legal, regulatory, privacy, security and governance requirements before broader implementation. In addition, several activities are intended to inform future phase investment and implementation decisions, and therefore their final scope may evolve based on findings generated during Phase 2.5.

5.3 Stakeholder Engagement and UCG Approach

Utility participation and expertise will continue to be critical for the advancement of the IEDR. NYSERDA therefore recommends the continuation of the IEDR UCG and UCG subcommittee structures throughout Phase 2.5, if approved. Evolving beyond solely organizing UCG engagement around individual data specification development activities, the objective-based approach would allow UCG engagement to be organized around the intended outcomes of broader prioritized programmatic objectives. During Phase 2, engagement was frequently organized around discrete data categories and specification development to meet the objective of acquiring data as outlined in Appendix B. In Phase 2.5, stakeholder discussions can be grouped around shared analytical purposes, such as rate analytics, energy insights, data quality, access management, and platform readiness.

Utility engagement would remain necessary where work depends on continued data delivery, data quality resolution, validation of specification changes, or implementation of new access and governance requirements. The proposed approach mitigates governance overhead by focusing detailed utility participation on activities with clear implementation dependencies.

This approach would preserve the collaboration required to improve data quality, validate utility submissions, and confirm the practical usefulness of Phase 2.5 outputs, while enabling an efficient process for identifying which topics should be advanced, deferred, or expanded in a future potential Phase 3 proposal.

5.4 Phase 3 Planning and Value Case Development

A principal purpose of Phase 2.5 would be to develop a more complete basis for any future Phase 3 proposal. This period of development would allow the program to translate Phase 2 implementation experience into defined Phase 3 objectives, priority capabilities, dependencies, technology priorities, access models, and value statements. Rather than predetermining the full scope of a future Phase 3, Phase 2.5 will allow the program to better provide information to support an actionable Phase 3 proposal and serve as a necessary transitional period that secures foundational work required to support a Phase 3. Expected planning outputs would include a refined Phase 3 value statement tied to priority stakeholder outcomes; a prioritized roadmap of

program objectives, platform capabilities, data categories, and implementation dependencies; an assessment of legal, regulatory, security, and governance requirements for expanded data access; recommendations for bulk data exchange, role-based access, and system-to-system integration; and validated assumptions regarding which Phase 2 datasets are sufficiently mature to support future analytical and program needs.

The Phase 2.5 activities described throughout this proposal are intended to inform and refine potential future Phase 3 opportunities. Areas for future consideration may include expanded user-facing analytics for affordability, bill impact analysis, rate comparison, electrification planning, and program targeting; reusable data services, bulk data access, system-to-system integration, and authorized third-party access models where policy and governance requirements allow; enhanced cross-dataset analysis, mapping, visualization, and reporting functionality; and support for emerging statewide priorities such as GOTF, flexibility markets, hosting capacity, clean energy siting, and broader energy data strategy initiatives. Any future Phase 3 proposal would provide additional detail regarding the scope, prioritization, expected benefits, costs, and implementation requirements associated with recommended capabilities.

6 Phase 2 Program Costs Until March 31, 2027

Phase 2 was accomplished through core and non-core program activities. Core program activities were completed by three main program contributors: the Program Manager (Deloitte), the UDA (Pecan Street), and the Development Team, led by E Source. As key data suppliers and potential IEDR users, noncore program activities were completed by the Jurisdictional Utilities (JU) and non-jurisdictional utilities (PSEG LI), to support the program through data transfer specification development and data transfers.

6.1 Phase 2 Core Program Costs

The IEDR Phase 2 Order established a budget cap for core program costs of \$36,386,193.00, including \$25,124,137.00 for cost associated with the Development Team, \$7,499,913.00 for costs associated with the Program Manager, \$470,700.00 for costs associated with the UDA, and \$3,291,442.00 for costs associated with NYSERDA administration. Core program costs are currently within approved Phase 2 budget caps. Based on the total Phase 2 budget cap of \$36,386,193.00, as of September 23, 2026, it is estimated that total Phase 2 program costs (projected through March 31, 2027) will total \$33,763,057.50.

\$33,763,057.50 is \$2,623,135.59 below the total approved by the Commission for all program contributors.

6.2 Phase 2 Core Program Costs Incurred

The Program Sponsor manages all IEDR program-related expenditures in compliance with NYSERDA's budget and accounting policies and principles. Core program costs incurred by program contributors through September 23, 2026, total \$27,209,020.64 and are displayed in Figure 3 and Table 14.

Estimated program costs projected through the current remainder of Phase 2 (until March 31, 2027), are calculations based on expenditure burn down rates as of August 31, 2026, and are shown in Table 6 below. Actual program budget expenditures (September 1, 2026, through March 31, 2027) will be made available in future IEDR Quarterly Reports.

6.2.1 Utilization of Program Manager Budget Cap

In the IEDR Phase 2 Order, the Commission stated “The Program Manager's allocated budget of \$7,499,913.00 is pivotal in executing strategic facets such as strategic communication and program integration, stakeholder engagement and management, program schedule, budget, reporting, technical oversight, and Phase 2 use case support. That notwithstanding, the Commission anticipates that the role and responsibilities of the Program Manager will change over time as the IEDR program enters Phase 2. As such, it is reasonable and appropriate for NYSERDA, as Program Sponsor, to be granted flexibility to utilize the Program Manager budget cap in a manner that is most cost effective and efficient to achieve the outcomes of the IEDR Phase 2. This flexibility shall be exercised in coordination with the IEDR Steering Committee.”⁴⁴ Over the course of Phase 2, as priorities focused on the acquisition of utility data, additional administrative burden shifted from the IEDR Program Manager to the Development Team to support an increase in required utility coordination through the establishment of UCG subcommittees. As such, in close coordination with DPS Staff, NYSERDA recommended to the IEDR Steering Committee that a portion of the approved Program Manager budget cap should be repurposed to support IEDR Development Team activities as described in this report and in line with the flexibility granted in the IEDR Phase 2 Order.

On September 25, 2026, the IEDR Steering Committee voted unanimously to approve this adjustment in Phase 2 budget caps, finding it in the best interest to cost effectively and efficiently achieve Phase 2 objectives. At the filing of this report, it is anticipated that the reallocation of Phase 2 funding between the IEDR Program Manager and the Development Team budget caps will not exceed \$731,563.44.

⁴⁴ State of New York Public Service Commission, Order Approving Integrated Energy Data Resource Phase 2 Budgets, 14

Figure 3 - Actual Phase 2 IEDR Core Program Cost Totals Per Program Contributor Through September 23, 2026

(April 1, 2024 – September 23, 2026)

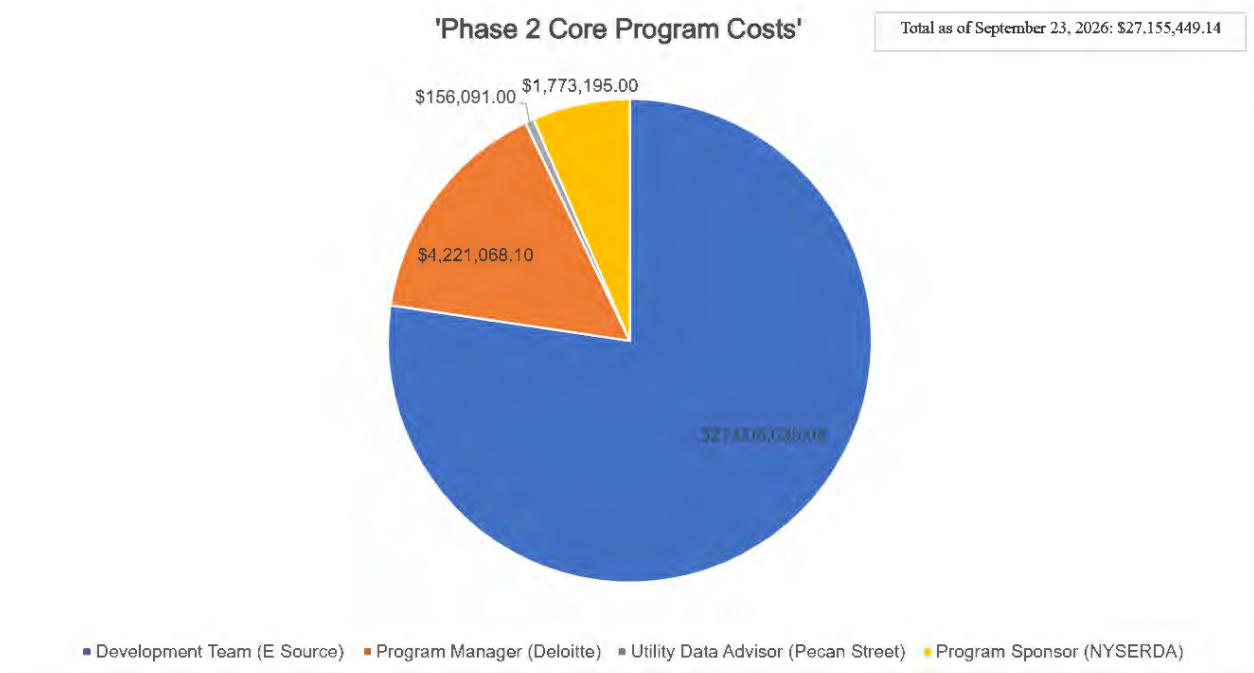


Table 14 – Actual Phase 2 IEDR Core Program Cost Totals Per Program Contributor Through September 23, 2026

	Program Manager	Utility Data Advisor	Development Team	Program Sponsor	Total Program
Contributor	Deloitte	Pecan Street	E Source	NYSERDA	Total Program
Total	\$4,221,068.10	\$156,091.00	\$21,005,095.04	\$1,773,195.00	\$27,155,449.14

Table 15 – Estimated Phase 2 Projected IEDR Core Program Cost Totals Per Program Contributor Through March 31, 2027

	Program Manager	Utility Data Advisor	Development Team	Program Sponsor	Total Program
Contributor	Deloitte	Pecan Street	E Source	NYSERDA	Total Program
Total	\$4,968,760.00	\$281,236.00	\$25,855,700.00	\$2,657,361.50	\$33,763,057.50

6.3 Phase 2 Non-Core Program Costs

The IEDR Order directed the development of the IEDR’s design and adopted the necessary framework for funding, program management, and governance. Regarding funding, in the Phase 2 Order, the Commission established utility-specific budget caps to complete the data-sourcing efforts for Phase 2 of IEDR development, as detailed in Figure 4 below. Based on public utility reporting, non-core program costs in Phase 2 totaled \$21,649,070.22 as of August 31, 2026.

Each utility submits an IEDR Quarterly Report in compliance with Ordering Clause No. 5 of the IEDR Order, where the Commission directed each utility to “... file a quarterly report on Integrated Energy Data Resource enablement project planning and investments, as discussed in the body of this Order, with the first report being due on or before October 31, 2021.”⁴⁵ As such, each Quarterly Report submitted to and located on the NYS DPS Document and Matter Management System (DMM) website provides a status of the ongoing and planned projects and investments supporting the enablement of the IEDR.

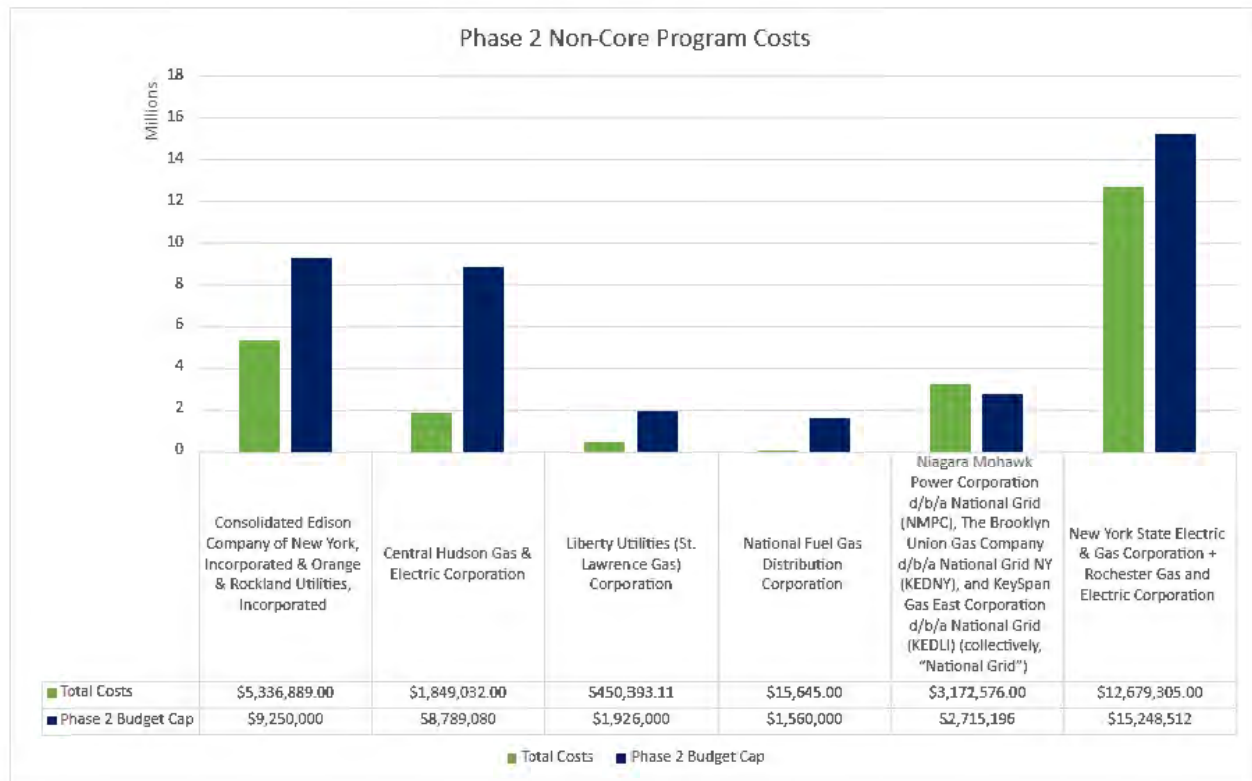
The IEDR Phase 2 noncore program costs are composed of the expected costs for the JU, which comprises:

- Central Hudson Gas & Electric Corporation
- Consolidated Edison Company of New York, Incorporated
- Liberty Utilities (St. Lawrence Gas) Corporation
- National Fuel Gas Distribution Corporation
- Niagara Mohawk Power Corporation d/b/a National Grid (NMPC), The Brooklyn Union Gas Company d/b/a National Grid NY (KEDNY), and KeySpan Gas East Corporation d/b/a National Grid (KEDLI) (collectively, “National Grid”)
- New York State Electric & Gas Corporation
- Orange & Rockland Utilities, Incorporated
- Rochester Gas and Electric Corporation

The JU incurred costs for the IEDR Phase 2 implementation are those related to the tasks described in the IEDR Order and the acquisition of foundational data from Appendix B of the IEDR Whitepaper.

⁴⁵ State of New York Public Service Commission, Order Implementing an Integrated Energy Data Resource, 39.

*Figure 4 - Actual IEDR Non-Core Program Costs Incurred – Phase 2
(April 2024–August 2026)*



7 IEDR Phase 2.5 Proposal

Phase 2 has resulted in the acquisition and standardization of a large quantity of highly valuable utility data and will culminate in the release of the first iteration of a robust, self-service data access and query tool. While bulk data acquisition was a necessary and prudent focus for Phase 2, additional work is required to evaluate both the data ingested by the IEDR and the requirements of more complex use cases to ensure that data in the IEDR is fit for purpose and covers all data required to support specific needs. Due to the volume and diversity of data in the IEDR, this evaluation is expected to lead to the discovery of gaps in data quality and scope that would require resolution before more robust analytical features could be confidently deployed on the platform.

Upon review with the IEDR Steering Committee, it was identified that a transitional period between formal development phases could allow for the completion of spillover data acquisition, validation, and presentation activities from Phase 2 while also supporting the targeted evaluation and preparation of high-priority data sets that will be required for future use case development. As such, Phase 2.5 success will be predicated on the ability to execute against the workplan described below to the extent possible given the external dependencies and risks discussed in Section 5.

NYSERDA believes that, if approved, the Phase 2.5 workplan embodies a continuation of essential work that independently drives value, ultimately representing “no regrets” actions that will be beneficial however the Commission selects to proceed after Phase 2.5.

7.1 Phase 2.5 Priority Milestones: Platform Development and Phase 3 Proposal

7.1.1 Platform Development

The proposed Phase 2.5 bridges current program objectives and potential high-value future expansions by focusing on the following three work streams:

- 1) **Operate:** Through Phase 2.5, core platform operations, user support, data pipelines, and security activities will continue. This will ensure ongoing user access to high-value data collected and exposed to date and prevent interruptions in utility data deliveries and validation activities that could negatively impact the overall quality and availability of data in the IEDR long term.
- 2) **Enhance:** Support Query Tool functionality, data quality, and deliver targeted, high-value additions to data access, including acquiring, integrating, and activating priority energy datasets in the Query Tool to support planning, program insights, and user-facing

modules; as well as build the data and tool foundations needed to support rate analytics, bill impact analysis, and future cost-planning capabilities.

- 3) **Plan:** Through processes enabled by the IEDR Steering Committee, IEDR Program Team, and the UCG, stakeholder inputs will be leveraged to refine and document priorities, dependencies, and inputs need to build a comprehensive and actionable plan for future IEDR development beyond Phase 2.5. This planning work will provide essential inputs to the Phase 3 Proposal and will continue throughout Phase 2.5 to ensure appropriate adjustments based on operational realities and developing opportunities are accounted for. Such planning work and ongoing planning refinements will be overseen, reviewed, and approved by the IEDR Steering Committee and incorporated into public reporting, as appropriate.

7.1.2 Phase 3 Proposal

NYSERDA recommends the Commission consider allowing NYSERDA to file a Phase 3 Proposal that would outline specific goals, timelines, milestones, and budget estimates for Phase 3 activities.

If the Commission approves recommendation in the IEDR Phase 3 Proposal, either in whole or in part, it is anticipated that NYSERDA, as the IEDR Program Sponsor, would be responsible for running a competitive procurement for a Phase 3 Development Team responsible for designing, building, and operating the IEDR in Phase 3. At the Commission's discretion, once Phase 3 budget caps are approved, NYSERDA can initiate a procurement process to secure the necessary services to execute on Phase 3 as soon as possible. This process is estimated to be complete within 6 months of the issuance of a Commission order approving Phase 3 work.

7.1.2.1 Phase 3 Proposal Timeline

Leveraging additional planning time between the filing of the Phase 2 Status and Summary Report and the official end of Phase 2 on March 31, 2027, NYSERDA proposes developing and submitting a Phase 3 Proposal for Commission consideration on or before March 31, 2027. The end of Phase 2 development will coincide with the submission of the Phase 3 Proposal. If the Commission approves the Phase 3 Proposal, Phase 3 development is anticipated to begin once the transitional Phase 2.5 concludes on March 31, 2028.

7.1.2.2 IEDR Phase 3 Development Team RFI

To collect additional information regarding potential Phase 3 costs, and to better inform the Phase 3 Proposal described in this section, NYSERDA will issue an IEDR Phase 3 Development RFI (IEDR RFI26) in Q4 2026 to acquire feedback that will assist NYSERDA in informing the Commission of the expected resources and expenditures necessary to continue to design, build, and operate the IEDR after the successful completion of Phase 2.5. When posted, the RFI will be available on NYSERDA's website and the NYS Contract Reporter. NYSERDA anticipates

responses to this RFI will be anonymized, summarized, and publicly filed as part of the Phase 3 Proposal to help inform the public and support Commission decision making.

7.2 Phase 2.5 Program Participant Roles and Proposed Modifications

7.2.1 Program Sponsor

If a Phase 2.5 is pursued, the Program Sponsor would focus on (1) Providing the means and methods for expending the PSC directed funding related to the program and reporting of such expenditures and IEDR Program progress; (2) Ensuring robust stakeholder engagement, including ensuring user support and stakeholder feedback channels remain open and responsive; (3) Monitoring adherence to the IEDR Program Charter by all program participants; (4) Supporting the IEDR Steering Committee, Program Manager, and Development Team investigate and resolve issues that could negatively affect the program's costs, schedule, or benefits, and; (5) Work with the IEDR Program Manager and Development Team to strategically grow the IEDR user base and coordinate IEDR development with existing and future IT resources to maximize the benefits derived from the platform and develop statewide resources cost effectively.

7.2.2 Program Manager

The Program Manager will focus on (1) Leading project management activities such as monitoring overall plans, schedules, and risks; (2) Supporting Steering Committee oversight and decision-making processes; (3) Leading stakeholder engagements and strategic communications, and; (4) Supporting the Development Team as needed in further defining and detailing use cases for Phase 2.5 and a potential Phase 3.

A contingency of approximately \$205,000.00 was included in the proposed Program Manager Phase 2.5 budget. NYSERDA proposes this funding could be utilized to support additional stakeholder engagement activities and/or provide project management surge support if deemed appropriate by the IEDR Steering Committee for efficiently and effectively accomplishing Phase 2.5 scope. This contingency would not be leveraged without a formal vote by the IEDR Steering Committee.

7.2.3 Development Team

The Development Team would focus on designing, building, and operating the IEDR platform. Throughout Phase 2.5, the team would coordinate with the IEDR Steering Committee, Program Sponsor, Program Manager, UCG, and other stakeholders to further refine and execute on the proposed Phase 2.5 work plan, including the identification and acquisition of additional data sets and development of functionality to be added to the platform. The Development Team would also identify additional use cases emerging from the user experience of released iterations of the platform to support Phase 3 planning. As new platform functionality is released, the

Development Team will perform all operating functions to ensure appropriate performance of each released feature.

7.2.4 Utility Data Advisor (UDA) and Proposed Role Evolution

Due to the statewide and cross cutting nature of the IEDR program, it has become commonplace for the IEDR Program Team and Steering Committee to encounter topics and challenges related to data access, quality, privacy, and availability that span beyond the scope of the IEDR. For example, while the IEDR will remain compliant with the DAF as it evolves, the DAF is a statewide framework that will impact, and needs to consider, many other data access mechanisms across the state. After reviewing with DPS Staff, an opportunity was identified to leverage the IEDR UDA role to review and provide recommendations for addressing these challenges broadly instead of exclusively focusing on how they related to the IEDR.

As the Phase 2 Order stated, “The Utility Data Advisor will continue to advise DPS Staff on matters related to the IEDR, including data quality, DAF development, and risks relating to IEDR integration”, and NYSERDA believes this is a natural progression for the role that will allow the UDA to assist DPS holistically across statewide data considerations. While the UDA completes these activities today in relation to the IEDR, after reviewing the original UDA solicitation and the resulting contract executed in 2021, the existing scope of work and funding is not flexible enough to accommodate additional workstreams that may be relevant to comprehensive data access solutions that extend beyond the IEDR.

After consulting with DPS Staff, this work may include, but may not be limited to:

- Reviewing existing or proposed program reporting requirements, especially for potential fit within the IEDR;
- Identifying opportunities to standardize utility data definitions and specification across programs and proceedings;
- Helping DPS understand utility source systems and how requested data is created and maintained;
- Identifying duplicative data collections and opportunities to reuse data already being reported by the utilities; and
- Providing technical support to DPS subject matter experts in translating policy or program needs into well-defined, structured data requirements that could ultimately be incorporated into the IEDR or other initiatives.

As such, to better support DPS Staff’s critical work evaluating and making recommendations to advance valuable and secure utility data access in the state of New York, NYSERDA recommends expanding the UDA’s scope of work and funding the role independently of specific IEDR timelines. If approved, NYSERDA recommends conduct a competitive procurement in the first half of 2027 to select a qualified vendor capable of offering currently scoped services and the services listed above for a 48-month term. This will allow DPS Staff maximum flexibility

utilizing this resource; regardless of subsequent IEDR maintenance and development, DPS Staff would still have access to a UDA that can assist in charting next steps for data access in NYS. However, if a Phase 3 is pursued, the UDA will have the ability to more comprehensively assess policy questions that impact systems above and beyond the IEDR.

After reviewing with DPS Staff, NYSERDA proposes the Commission approve a budget cap of \$1,023,198.50 for 48-month period post-contracting. For a breakdown of budget estimates, please see Figure 5 below.

Figure 5 - Proposed UDA Budget Cap

Task	2027	2028	2029	2030	2031	Total
Project Management and Cross Team Communication and Coordination	\$ 16,175.99	\$ 33,969.57	\$ 35,668.05	\$ 37,451.45	\$ 19,662.01	\$ 142,927.06
Support DPS Analysis and Stakeholder Engagement	\$ 34,662.83	\$ 72,791.93	\$ 76,431.53	\$ 80,253.11	\$ 42,132.88	\$ 306,272.27
Review Utility Programs, Data, Reporting Implementation Plans, and Other Documentation	\$ 34,662.83	\$ 72,791.93	\$ 76,431.53	\$ 80,253.11	\$ 42,132.88	\$ 306,272.27
Support DAF Evaluation and Continuous Improvement	\$ 28,885.69	\$ 60,659.94	\$ 63,692.94	\$ 66,877.59	\$ 35,110.73	\$ 255,226.89
Travel	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 12,500.00
Total	\$ 116,887.32	\$ 242,713.38	\$ 254,724.05	\$ 267,335.25	\$ 141,538.51	\$ 1,023,198.50

In addition, in its role as the IEDR Program Sponsor and as the administrator of the UDA contract, NYSERDA would like to clarify the UDA's permission status. It's NYSERDA's understanding that, as an agent of DPS Staff, the UDA should be able to review the same confidential utility data that DPS Staff has the ability to review. NYSERDA respectfully requests that the Commission confirm this assumption so that NYSERDA can appropriately ensure the UDA can access all necessary data required to support DPS Staff under their contract.

7.2.4.1 Phase 2.5 Utility Data Advisor (UDA) Funding source

For simplicity and expediency, NYSERDA proposes continuing to use the Bill-as-You-Go (BAYG) method for cost recovery established in Order Approving Integrated Energy Data Resource Phase 2 Budgets for both the IEDR and the UDA. While, if approved, the UDA will take on a broader role supporting DPS in the evaluation of data access concerns across NYS, the UDA will still be imbedded in IEDR processes and reviews, and they will support the flow of requirements and knowledge between the IEDR and other data access topics. As such, NYSERDA believes it is appropriate to continue to use the same method of cost recovery for both line items. Aligned with Phase 1 and Phase 2 precedent, NYSERDA recommends Phase 2.5 costs be allocated across the jurisdictional electric utilities and Long Island Power Authority (LIPA) based on a Megawatt-Hour (MWh) load ratio share.

7.2.5 Utility Coordination Group

NYSERDA anticipates utility participation and expertise will continue to be critical for the continued advancement of the IEDR. NYSERDA therefore recommends the continuation of the IEDR UCG and UCG subcommittee structures throughout Phase 2.5, if approved. Instead of continuing to be structured around specific data categories, the IEDR Team proposes maintaining, at minimum, three Phase 2.5 subcommittees, one for each of the key objectives

discussed in Section 7.1.1 above: Rate Analytics, Energy Insights, and IEDR Platform Core Capabilities. This reorganization of subcommittees will better support the transition from the new data transfer specification development work prevalent in Phase 2 to the more cross-cutting data transfer specification refinement, data quality evaluation and improvement, and use case and access framework development activities proposed for Phase 2.5.

7.2.5.1 Utility Data Acquisition and the Evolution of Appendix B

Appendix B of the IEDR Whitepaper covers a broad spectrum of useful energy data and data categories critical to advancing NYS's policy objectives. By focusing Phase 2 data acquisition activities on the collection of Appendix B data, the IEDR team has been able to prioritize structured coordination with utilities through UCG subcommittees, develop flexible, expandable data models, identify and resolve critical challenges to data standardization and validation, and ingest a vast quantity of foundational data required for unlocking high value query capabilities and future use cases.

During coordination with DPS, the IEDR Steering Committee, the UCG, and IEDR Advisory Group members throughout Phase 2, the IEDR Program Team identified data not explicitly documented in Appendix B that was deemed a high priority for acquisition, and some of this data has already been incorporated into existing data transfer specifications. For example, a field indicating customer account segment was not initially included in Appendix B. However, this information is required to capture the Energy Information Administration (EIA) Form EIA-861 segment (Residential, Commercial, Industrial) at the account level, which is needed to comply with existing regulatory privacy requirements for aggregating community scale energy data. After coordinating with the IEDR Steering Committee and UCG, this field was included in the IEDR customer data transfer specification and is currently being delivered by participating utilities to the IEDR. The customer data specification was also expanded to include customer ICAP tags and additional service supplier information. Together, these additions support privacy-compliant aggregation by customer segment, provide relevant capacity information, and help distinguish supplier charges from utility charges when interpreting billing data.

Additionally, the network data specification was also expanded to reflect operational and geographic characteristics needed to represent utility systems accurately. These additional fields define sections of circuits and feeders and associated them with GIS coordinates. The specification also includes information needed to represent Con Edison's underground network distribution system including network definitions, geographic regions, and geospatial geometries that distinguish this configuration from other distribution systems.

Following this precedent, examples of additional data fields not explicitly documented in Appendix B that could be integrated by the IEDR to deliver significant value to stakeholders in future phases of IEDR development include:

- Additional DER attributes identified through stakeholder engagement and emerging statewide priorities, including information that could enhance DER planning, integration valuation, and analysis in support of initiatives such as GOTF
- Additional network and system planning data needed to support advanced grid planning and analytical capabilities, including load-flow analysis and other requirements also identified through the Grid of the Future proceeding
- Locational and system value information that provides additional context for DER investments, planning activities, and assessment of grid benefits
- Supplemental rate and valuation data that may support future analytical capabilities such as bill impact analysis, demand charge modeling, affordability assessments, behind-the-meter optimization, and customer decision support tools

Throughout the life of the IEDR, Appendix B has functioned as a programmatic guide, informing the development of the program's data transfer specifications. As detailed above, it is anticipated that new data points other than what was initially documented in Appendix B will be made available, discovered, and identified for priority incorporation into IEDR data transfer specifications.

Therefore, NYSERDA recommends that the IEDR Steering Committee have the authority to add, remove, or otherwise update individual data points within the existing Appendix B data categories, reflective of priorities identified in consultation with the IEDR Steering Committee, as long as the newly identified data points can be classified within existing Appendix B data categories. NYSERDA further recommends that the IEDR data transfer specifications that will be made available within the IEDR Query Tool serve as public record of currently available, Appendix B classified data points.

NYSERDA also recognizes that any changes to the existing Appendix B data categories containing utility data must first be approved by the Commission before operationalizing within the program.

7.2.6 IEDR Steering Committee

As described in Section 3, throughout Phase 2, the IEDR Steering Committee has intervened to address policy, schedule, and budget issues within the program. This has extended to an active oversight role of UCG subcommittees and utility data acquisition activities. This ensures the IEDR Steering Committee has insight and input into the prioritization and content of data transfer specifications that dictate what data is available in the IEDR to support user queries and other analysis tools. This process allows DPS Staff, advised by the UDA, to provide direct oversight of utility data acquisition activities, ensuring that all data being transferred to the IEDR is high value, reasonable, and allowable under the existing regulatory framework. NYSERDA recommends that this process continue into Phase 2.5 to ensure that sufficient governance

controls are in place to advance high-priority data access through the IEDR, and to allow for continuous oversight and modification of the datasets recommended for future acquisition, including data that was not included in Appendix B of the IEDR Whitepaper.

7.2.7 IEDR Advisory Group

Engagement with the IEDR AG in Phase 1 and early Phase 2 allowed the IEDR Program to gather broad, directional feedback regarding priority use cases. While this feedback was critical to the IEDR's overall design, the re-sequencing of program activities to support utility data acquisition and the further refinement of feasibility analysis fundamentally changed stakeholder engagement needs and priorities within the program. As discussed in Section 3, to meet the evolving needs of future IEDR development phases, it will be necessary to work with a wide range of subject matter experts and end users directly on an ongoing and ad hoc basis to gather targeted feedback regarding specific features aligned with NYS's energy goals.

While the IEDR Order specified that the Program Sponsor's duties would include "... organizing... an IEDR program AG comprising representatives for all significant stakeholder categories"⁴⁶ and that "... the AG should function over the life of the IEDR"⁴⁷, evolving programmatic conditions are better served by a more flexible framework with a rotating roster of subject matter experts and IEDR end users in potential future phases of the IEDR. Meeting current and evolving programmatic needs requires reorientating stakeholder engagement towards the more specialized activities and towards a newly imagined stakeholder engagement model.

Therefore, NYSERDA recommends the Commission transitions the IEDR AG from a body with relatively static membership to a more dynamic approach to stakeholder engagement. This dynamic approach includes continuing to pause formal AG function and activities, while previously engaged stakeholders are reengaged with on an as-needed basis in coordination with the IEDR Steering Committee, depending on programmatic need for engagement with particular subject matter experts throughout the remainder of Phase 2 and Phase 2.5 program operations. While formal AG engagement would remain paused through Phase 2.5, Phase 3 planning exercises would revisit the concept of meaningful stakeholder engagement and include a recommendation for stakeholder engagement in the future Phase 3 Proposal.

7.3 Phase 2.5 Funding Request

Proposed costs associated with Phase 2.5 have been broken out into core and non-core program costs. Costs associated with the Program Manager (Deloitte), the Development Team (E Source), and the Program Sponsor (NYSERDA) comprise the core program costs summarized below. The proposed budget only includes funding for the UDA up to the point at which the role would cut over to the proposed expanded role. The proposed costs beyond this point are detailed in Section

⁴⁶ State of New York Public Service Commission, Order Implementing an Integrated Energy Data Resource, 22.

⁴⁷ State of New York Public Service Commission, Order Implementing an Integrated Energy Data Resource, 28.

7.2.4 and, as proposed, may include activities unrelated to the IEDR. Phase 2.5 IEDR core program costs are anticipated to total \$10,394,682.03.

7.3.1 Program Manager Budget Cap Flexibility Request

As stated in the Commission’s Order Approving Integrated Energy Data Resource Phase 2 Budgets: “[I]t is reasonable and appropriate for NYSERDA, as Program Sponsor, [to be] granted flexibility to utilize the Program Manager budget cap in a manner that is most cost-effective and efficient to achieve the outcomes of the IEDR Phase 2”. Following precedent set in Phase 2 by the Commission's Phase 2 Budget Order, and because Phase 2 Development Team activities evolved to shoulder administrative responsibilities that were inexorably tied to technical workstreams, necessitating the reallocation of Program Manager budget funds to the Development Team budget (see Section 6.3), NYSERDA requests continued flexibility to utilize the Program Manager budget cap in a manner that is most cost-effective and efficient to achieve the outcomes of Phase 2.5. As applied in Phase 2, this flexibility would be exercised in coordination with the IEDR Steering Committee.

Table 16 - Projected IEDR Core Program Cost Totals Per Program Contributor in Proposed Phase 2.5 - April 1, 2027, Through March 31, 2028

	Program Manager	Development Team	Program Sponsor	Utility Data Advisor	Total Program
Contributor	Deloitte	E Source	NYSERDA	Pecan Street	
Total	\$1,168,211.03	\$8,133,159.00	\$1,093,312.00	\$50,000.00	\$10,444,682.03

Figure 6 – Projected UDA Costs in Proposed Phase 2.5 - April 1, 2027, Through December 31, 2027

Task	2027
Project Management and Cross Team Communication and Coordination	\$ 10,000.00
Support DPS Analysis and Stakeholder Engagement	\$ 20,000.00
Review Utility Programs, Data, Reporting Implementation Plans, and Other Documentation	\$ 20,000.00
Total	\$ 50,000.00

Figure 7 - Projected IEDR Program Sponsor Costs in Proposed Phase 2.5 - April 1, 2027, Through March 31, 2028

Task	2027	2028	Total
Labor	\$ 707,250.00	\$ 296,062.00	\$ 1,003,312.00
DAC Stakeholder Engagement	\$ 30,000.00	\$ 15,000.00	\$ 45,000.00
Additional Support Services	\$ 30,000.00	\$ 15,000.00	\$ 45,000.00
Total	\$ 767,250.00	\$ 326,062.00	\$ 1,093,312.00

Figure 8 - Projected IEDR Program Manager Costs in Proposed Phase 2.5 - April 1, 2027, Through March 31, 2028

Task	2027	2028	Total Phase 2.5 Request
Labor	\$848,718.94	\$319,492.09	\$1,168,211.03

Figure 9 - Projected IEDR Development Team Costs in Proposed Phase 2.5 - April 1, 2027, Through March 31, 2028

Objective / Workstream	2027	2028	Total
IEDR Platform Core Capabilities	\$1,779,480.00	\$622,470.00	\$2,401,950.00
Energy Insights	\$1,415,250.00	\$495,150.00	\$1,910,400.00
Rate Analytics	\$796,770.00	\$278,910.00	\$1,075,680.00
Total Labor	\$3,991,500.00	\$1,396,530.00	\$5,388,030.00
Software Fees (all workstreams)	\$2,033,429.00	\$711,700.00	\$2,745,129.00
Total Phase 2.5 Request	\$6,024,929.00	\$2,108,230.00	\$8,133,159.00

7.4 Estimated Phase 2.5 Non-core Costs

After aligning on the proposed Phase 2.5 scope with the IEDR Steering Committee, the IEDR Program Team, members of DPS Staff, and the UDA met with members of the UCG on August 11, 2026, to review the proposed work plan, answer questions, and establish timelines for supporting the creation of utility Phase 2.5 budget estimates to support data pipeline maintenance, new data acquisition, and data quality improvement work. The group met one additional time on September 8, 2026, to discuss.

As a result, it is anticipated that the JU and PSEG LI will concurrently file separate reports on DMM to inform the Commission of the following:

- Projection of expenditures through the remainder of Phase 2 (October 1, 2026 – March 31, 2027)
- Estimated cost to support IEDR activities, including maintenance, data acquisition, and data quality improvements, over a 12-month period (April 1, 2027 – March 31, 2028)

It is anticipated that the JU and PSEG LI will file this information in parallel to this report on or about September 29, 2026, and these Phase 2.5 budget filings should be referred to for further details regarding anticipated Phase 2.5 non-core costs.

7.5 In The Event of Funding Discontinuation

If the Commission selects not to pursue further maintenance or development of the IEDR platform in Phase 2.5, NYSERDA recommends the following actions be taken to ensure that the progress made to date by the IEDR can be leveraged by future NYS initiatives:

- NYSERDA requests the Commission allow remaining Phase 2 funding, not to exceed the total budget cap defined in the IEDR Phase 2 Order, be utilized for adequately sunsetting the IEDR. This funding would be leveraged to support labor and software costs across program participants during project close out. NYSERDA, in close coordination with the IEDR Steering Committee, would file a more specific project plan and budget outlining these activities at the Commission's discretion.
- NYSERDA would coordinate with the IEDR Steering Committee to select an appropriate and secure repository for data and documentation collected during the operation of the IEDR to retain knowledge and resources for future use.
- NYSERDA would coordinate with the current IEDR Administrator, E Source, to complete the following:
 - Execute the IEDR Turnover Plan: The Turnover Plan will ensure the successful transfer of all utility and non-proprietary non-utility data, data transfer specifications, data dictionaries, user account information, and other data, metadata, or related documentation used to populate the IEDR with useful data and information to a designee as specified by NYSERDA.
 - Execute data destruction requirements: At NYSERDA's direction, E Source would destroy and provide a Certificate of Data Destruction for any confidential data and information used as part of the IEDR project.
- NYSERDA recommends the Commission form a working group convening participants from DPS Staff, the JU and PSEG LI, NYSERDA, and other members as appropriate to continue advancing the topics of data standardization, data quality, and data access in NYS in a centralized forum.

NYSERDA strongly believes the data collected and processed, the data specifications developed, and lessons learned by the IEDR throughout Phase 1 and Phase 2 are invaluable in supporting the data access necessary to support the accomplishment of NYS's policy priorities, and if IEDR Phase 2.5 is not pursued, the forward progress made by the IEDR should be leveraged to inform future data access initiatives.

8 Conclusion

To continue to deliver the most value to NYS, in early Phase 2 it became clear that data acquisition activities would require resequencing. This included the prioritization of foundational and replicable data acquisition activities essential to long-term IEDR value offerings and greater collaboration with utilities.

While cumulative technical challenges in data acquisition led to reinventing and deepening the intentions of program operations, as well as a necessary pause in stakeholder engagement, the processes and novel status quo that emerged has resulted in substantial program

accomplishments, including acquiring the vast majority of available data items specified in Appendix B of the IEDR Whitepaper, standardizing and processing foundational data that enables quality, long-term use case development and data access, and the creation of robust, sustainable digital infrastructure that can support a broad spectrum of data needs throughout the stakeholder ecosystem while efficiently scaling over time.

8.1 Appendix B of the IEDR Whitepaper

The IEDR Order recommended “Appendix B of the Whitepaper, a table listing the recommended data items to be acquired, integrated, managed, analyzed, and made accessible by the proposed IEDR.”⁴⁸ Based on approved and in-flight data transfer specifications, the IEDR platform is currently on track to address approximately 76% of Appendix B data categories by the end of Phase 2, representing acquisition of approximately 92% of Appendix B data fields that are in existence to be acquired from utility or public data sources, subject to ongoing feasibility assessment.

8.2 Foundational Data Acquisition Enabling Use Case Development

As described throughout the report, substantial progress has been made toward enabling the initial catalogue of stakeholder use cases, with approximately 81% of the evaluated Phase 2 use case portfolio enabled or partially enabled by the end of Phase 2. By focusing first on establishing the underlying data foundation and modular query capabilities, the IEDR platform is positioned to support continued expansion of use case functionality over time and provide the scalable foundation necessary to advance the broader use case objectives contemplated by the Order and beyond.

8.3 Robust Digital Infrastructure

Through processes established to support the re-sequencing of foundational data acquisition and support long-term use case development, the IEDR Program Team established a consistent statewide data model across participating utilities, which included:

- Standardized ingestion and transformation of utility and non-utility datasets
- Harmonization of disparate source data into common statewide data structures
- Automated validation and data quality monitoring
- Privacy-preserving aggregation and controlled data access
- Traceability and auditability of data processing activities.

Improving data integration, aggregation, and accessibility by aligning datasets into standardized and fit-for-purpose structures and enabling privacy-safe aggregation approaches established a

⁴⁸ State of New York Public Service Commission, Order Implementing an Integrated Energy Data Resource, 12.

secure and scalable infrastructure supporting ongoing data acquisition, integration, and platform operations.

Beyond use cases confined to the IEDR, the data standardization and infrastructure work performed by the IEDR represents a significant undertaking of addressing utility data challenges known throughout the spectrum of utility data stakeholders. Without aggregating standardized utility data in a centralized data platform, efforts to acquire, cleanse, harmonize, and operationalize utility data would be left to individual stakeholders. Therefore, the IEDR platform, its data specifications, and its robust data pipelines, function as an economy of scale by reducing resource expenditures for stakeholders in their pursuit of quality utility data. This positions the IEDR to help utility data stakeholders and other NYS initiatives, such as the GOTF, save time and resources and accelerate their utility data collection, processing, and analysis efforts.

8.4 The Path Forward

The Query Tool Public Release 1.0, planned for Q1 2027, intends to provide centralized querying, filtering, visualization, and export capabilities using currently available and validated datasets across selected utility data categories. This initial release reflects the phased delivery approach adopted during Phase 2 and provides the operational foundation for incremental expansion of additional modules, datasets, and cross-data-set functionality as data readiness continues to advance in future potential program phases.

Moving beyond the accomplishments of Phase 2 and looking towards the future, NYSERDA proposes a Phase 2.5 to balance and deliver on three critical program needs in preparation for a future Phase 3: maintaining the existing IEDR platform, completing and refining priority datasets and user-facing tools, and developing the scope, value case, and implementation roadmap for potential Phase 3 activities. Expected Phase 2.5 outputs include a continuation of essential work that independently drives value, a prioritized roadmap of Phase 3 program objectives, platform capabilities, data categories, and implementation dependencies, and an assessment of legal, regulatory, security, and governance requirements for expanded data access.

While significant progress has been made advancing the IEDR platform, including collaborative processes required to acquire and enable centralized and standardized data, additional planning efforts are required to fully elucidate the future of the program. The proposed Phase 2.5 would provide the necessary time to continue to plan and coordinate among DPS Staff, the IEDR Steering Committee, and the IEDR Program Team, to further refine, focus, and prioritize a holistic and meaningful Phase 3 vision. Within Phase 3 planning, Phase 2.5 would also assess data access critical path items essential to enabling high-value stakeholder data access objectives. Beyond Phase 3 planning requirements, continuing to operate the platform in Phase 2.5, while delivering targeted enhancements to the platform ensures continuity of platform offerings while continuing to increase the IEDR's value offering to end users as the platform matures.

For the reasons discussed above, NYSERDA, as the IEDR Program Sponsor, sincerely recommends the Commission review and approve proposed Phase 2.5 scope and budget caps for the IEDR Program Sponsor, Program Manager, and Development Team, and approve the proposed approach and timeline for Phase 3 Proposal.

See Section 8.5 below for a complete list of requests to the Commission detailed throughout this report.

8.5 Summary of Requests to the Commission

8.5.1 Bifurcation of Phase 2 Reporting

NYSERDA recommends that this Phase 2 Status and Summary Report serve as the first in a series of two filings: a Phase 2 Status and Summary Report and a separate Phase 3 Proposal. This bifurcation of final Phase 2 reporting follows existing precedent set in Phase 1, in which the Phase 1 Status and Summary Report and the Phase 2 Proposal were filed separately, sequentially, and procedurally to secure additional IEDR Program funding in a comprehensive and actionable manner.

- NYSERDA requests Commission review and ruling on the approach to bifurcate final Phase 2 reporting in line with existing reporting precedent, which would include this filing and a subsequent Phase 3 Proposal to be filed on or before March 31, 2028.

8.5.2 Final Program Reporting

NYSERDA recommends that final Phase 2 program reporting be summarized and included within the Phase 3 Proposal and future Quarterly Reports, and that final Phase 2.5 program reporting be included in future Quarterly Reports.

- NYSERDA requests Commission review and ruling on the approach to include a summary of final Phase 2 activities in the future Phase 3 Proposal and IEDR Quarterly Reports.

8.5.3 Commission Acknowledgement of the Evolution of Appendix B

Throughout the life of the IEDR, Appendix B has functioned as a programmatic guide, informing the development of the program's data transfer specifications. As detailed in Section 7.2.5.1, it is anticipated that new data points other than what was initially documented in Appendix B will be made available, discovered, and identified for priority incorporation into IEDR data transfer specifications.

- NYSERDA requests Commission review and ruling on the IEDR Steering Committee having the authority to add, remove, or otherwise update individual data points within the

existing Appendix B data categories, reflective of priorities identified in consultation with the IEDR Steering Committee, as long as the newly identified data points can be classified within existing Appendix B data categories.

- NYSERDA requests Commission review and ruling that any changes to the existing Appendix B data categories containing utility data must first be approved by the Commission before operationalizing within the program.

8.5.4 Modification to the Utility Data Advisor (UDA) Role

While the UDA continues to complete activities in relation to the IEDR, after reviewing the original UDA solicitation and the resulting contract executed in 2021, the existing scope of work and funding is not flexible enough to accommodate additional workstreams that may be relevant to comprehensive data access solutions but not directly related to the IEDR.

- NYSERDA requests that the Commission decouple the role of the UDA from IEDR timeline and scope, and reviews and approves the new proposed scope of work, budget caps, and funding mechanism.

8.5.5 Phase 2.5 funding

Proposed costs associated with Phase 2.5 have been broken out into core and non-core program costs. The proposed budget for the UDA has not been included in this summary as in previous budget estimates, as these proposed costs are detailed in Section 7 and, as proposed, may include activities unrelated to the IEDR. Phase 2.5 IEDR core program costs are anticipated to total \$10,444,682.03.

- NYSERDA requests that the Commission approve core IEDR Program costs for Phase 2.5 in the amount of \$10,444,682.03.

9 Appendix A – Phase 2 Appendix B and Use Case Mapping Table

Query Modules	Datasets	Use Case Themes	Use Cases	Ability to meet in Phase 2	Notes
Rate Plan	Rates V004	Utility Rate Plan Access	Rate plan data	Yes	
Community Scale Energy	Customer V005	Community Energy Planning	Community energy planning (simplification and rebrand of the community choice aggregation use case in Phase 2 Proposal)	Yes	
			Enhanced Community Distributed Generation (CDG) Customer Data Coordination	partial, missing data	customer usage and billing data; No CDG program participation info
		Customer Data Access and Privacy Management (Aggregated data)	Aggregated customer data analysis for improved energy efficiency (EE) programs	partial, missing data	customer usage and billing data; No EE program participation info
			Customer meter data access upon enrollment in DR and DER programs	partial, missing mechanism	customer usage and billing data; requires authorization mechanism
			Efficient and effective access to existing customer billing data	partial, missing mechanism	customer usage and billing data; requires authorization mechanism
			Enhance identification of heating, ventilation, and air conditioning (HVAC) energy efficiency opportunities	partial, missing data	customer usage and bill data; No building attribute data
			Improving access to customer data for DERs	partial, missing data and analytics	interval data; No program enrollment data or analytics to detect/build propensity models
			Unlocking and Operating Flexible Demand Response (DR) Programs at Scale	partial, missing analytics	interval data; No analytics to detect/build propensity models
			Customer-Initiated Customer Usage and Billing Data Sharing	partial, missing mechanism	customer usage and billing data; requires authorization mechanism
Network / DER	Network V006 DER V001	DER Market Expansion and Installation Efficiency	Accelerate DER/commodity installation implementations	partial, missing data and analytics	customer and usage data; missing tax exemption status and need calculations on ICAP difference
		DER and Renewable Integration	State of DER dashboard	Yes	
			Accelerated DER siting	Yes	
			Accessible DER interconnection (hosting capacity) information	Partial, missing data	missing project cost and time information
			DER registry	Yes	
			Determine customer site hosting capacity	Yes	
		DER Customer Engagement	Identifying and engaging new customers for DERs	Partial, missing data	missing reliability data
			Explore Aggregated Usage Data Combined with Other Data to Find New Customer Target Groups for Distributed Energy Resources (DERs) Use Case	Partial, missing data	missing reliability data
			Reduced Sales Costs for Distributed Energy Resources (DERs) Developers Through	Partial, missing data	missing reliability data

		Comprehensive Customer Data Access Use Case			
		Integrated EV and Building Electrification	Accelerating EV charger siting and program opportunities	Partial, missing data	where are the EVs, utilization rates of chargers
DER/Customer		Utility and Market Operations	Performance evaluation of DERs	Yes, missing analytics	
Building Details	Building Details V001	Comprehensive Whole Building Energy Analysis	Enable whole building energy consumption analysis	No	
		Integrated EV and Building Electrification	Building electrification site identification	Partial, missing data	Missing building characteristics
Energy Insights	All the above	Data-Driven Clean Energy Strategy	Developing and implementing more effective clean energy strategies and programs	Partial, missing data	
		Data-Driven Clean Energy Strategy	Electricity emissions data for improvement of GHG regulation	Partial, missing analytics	
		Inclusive Energy Access & Equity	Informing and enhancing utility programs to support disadvantaged communities (DACs)	Partial (need to investigate if we can tie to a zip code)	
		Inclusive Energy Access & Equity	Reducing energy cost burden for LMI households	No	missing energy cost burden data / LMI status
		Utility and Market Operations	Enhancing the implementation of customer time-of-use plans for electric vehicle (EV) charging	Partial, missing analysis	anticipated for Phase 3
		Utility and Market Operations	Facilitate IEDR wholesale services	No	
		Utility and Market Operations	Improving reliability benchmarking for utility operational performance	No	
		Utility and Market Operations	Metrics to establish renewable gas program	No	

10 Appendix B – IEDR Whitepaper Appendix B Attribute Status List

Status of Data Items:

- Acquired: acquired at the time of the report.
- Planned: planned to be acquired by the end of Phase 2.
- Not planned: not Planned to be acquired by the end of Phase 2. This status reflects data items that are currently unavailable, not consistently tracked across utilities, restricted from sharing (e.g., CEII, SPII), or determined to have limited feasibility for acquisition within the Phase 2 timeframe.

Category	Data Items	Data Category	Source	Status*	Planned Timing
Substation Details	substation ID	structured	utility	Acquired	
Substation Details	utility ID	structured	utility	Acquired	
Substation Details	NYISO zone	structured	utility	Acquired	
Substation Details	NYISO transmission node	structured	utility	Acquired	
Substation Details	street address	structured	utility	Acquired	
Substation Details	GIS coordinates	structured	utility	Acquired	
Substation Bus Details	bus ID	structured	utility	Acquired	
Substation Bus Details	substation ID	structured	utility	Acquired	
Substation Bus Details	utility ID	structured	utility	Acquired	
Substation Bus Details	Bus voltage	structured	utility	Acquired	
Substation Bus Details	bus protection details	unstructured	utility	Acquired	
Substation Bus Details	bus-connected transformer IDs	structured	utility	Acquired	
Substation Bus Details	bus-connected circuit IDs	structured	utility	Acquired	
Substation Transformer Details	transformer ID	structured	utility	Acquired	
Substation Transformer Details	substation ID	structured	utility	Acquired	
Substation Transformer Details	utility ID	structured	utility	Acquired	

Substation Transformer Details	transformer type	structured	utility	Acquired	
Substation Transformer Details	transformer manufacturer	structured	utility	Acquired	
Substation Transformer Details	transformer model	structured	utility	Acquired	
Substation Transformer Details	transformer configuration	structured	utility	Acquired	
Substation Transformer Details	transformer high-side bus ID	structured	utility	Acquired	
Substation Transformer Details	transformer low-side bus ID	structured	utility	Acquired	
Substation Transformer Details	transformer high-side voltage	structured	utility	Acquired	
Substation Transformer Details	transformer low-side voltage	structured	utility	Acquired	
Substation Transformer Details	transformer protection details	unstructured	utility	Acquired	
Substation Transformer Details	transformer nameplate load rating	structured	utility	Acquired	
Substation Transformer Details	transformer load factor	structured	utility	Acquired	
Substation Transformer Details	transformer hourly load historical data	structured	utility	Not Planned	
Substation Transformer Details	transformer hourly load forecast data	structured	utility	Not Planned	
Circuit Details	circuit ID	structured	utility	Acquired	
Circuit Details	connected substation ID(s)	structured	utility	Acquired	
Circuit Details	connected substation bus ID(s)	structured	utility	Acquired	
Circuit Details	utility ID	structured	utility	Acquired	
Circuit Details	NYISO zone	structured	utility	Acquired	
Circuit Details	NYISO transmission node	structured	utility	Acquired	
Circuit Details	nominal circuit voltage	structured	utility	Acquired	
Circuit Details	minimum load	structured	utility	Acquired	
Circuit Details	average load	structured	utility	Acquired	
Circuit Details	average daily peak load	structured	utility	Acquired	
Circuit Details	average time of daily peak load	structured	utility	Acquired	
Circuit Details	annual peak load	structured	utility	Acquired	
Circuit Details	annual peak load date-time	structured	utility	Acquired	
Circuit Details	load rating at the substation	structured	utility	Acquired	

Circuit Details	load factor at the substation	structured	utility	Acquired	
Circuit Details	circuit hourly load historical data	structured	utility	Planned	Q4 2026
Circuit Details	circuit hourly load forecast data	structured	utility	Planned	Q4 2026
Circuit Details	circuit length	structured	utility	Acquired	
Circuit Details	circuit protection details	unstructured	utility	Acquired	
Circuit Details	historical hosting capacity at end of line	structured	utility	Acquired	
Circuit Details	forecast hosting capacity at end of line	structured	utility	Acquired	
Circuit Details	hosting capacity calculation methodology	unstructured	utility	Acquired	
Circuit Details	hosting capacity calculation inputs	unstructured	utility	Acquired	
Circuit Details	hosting capacity constraint reason(s)	unstructured	utility	Acquired	
Service Transformer Details	service transformer ID	structured	utility	Acquired	
Service Transformer Details	connected circuit ID	structured	utility	Acquired	
Service Transformer Details	connected phase(s)	structured	utility	Acquired	
Service Transformer Details	GIS coordinates	structured	utility	Acquired	
Service Transformer Details	utility ID	structured	utility	Acquired	
Service Transformer Details	NYISO zone	structured	utility	Acquired	
Service Transformer Details	NYISO transmission node	structured	utility	Acquired	
Service Transformer Details	transformer type	structured	utility	Acquired	
Service Transformer Details	transformer manufacturer	structured	utility	Acquired	
Service Transformer Details	transformer model	structured	utility	Acquired	
Service Transformer Details	transformer configuration	structured	utility	Acquired	
Service Transformer Details	transformer high-side voltage	structured	utility	Acquired	
Service Transformer Details	transformer low-side voltage	structured	utility	Acquired	
Service Transformer Details	transformer nameplate rating	structured	utility	Acquired	
Service Transformer Details	transformer load factor	structured	utility	Acquired	
Service Transformer Details	date installed	structured	utility	Acquired	
Electric Service Point Details	service point ID	structured	utility	Acquired	
Electric Service Point Details	street address	structured	utility	Acquired	

Electric Service Point Details	GIS coordinates	structured	utility	Acquired	
Electric Service Point Details	utility ID	structured	utility	Acquired	
Electric Service Point Details	NYISO zone	structured	utility	Acquired	
Electric Service Point Details	NYISO transmission node	structured	utility	Acquired	
Electric Service Point Details	connected circuit ID	structured	utility	Acquired	
Electric Service Point Details	connected service transformer ID	structured	utility	Acquired	
Electric Service Point Details	interconnection power rating	structured	utility	Acquired	
Electric Service Point Details	meter ID	structured	utility	Acquired	
Electric Service Point Details	service voltage	structured	utility	Acquired	
Electric Service Point Details	number of phases	structured	utility	Acquired	
Electric Service Point Details	average load	structured	utility	Planned	Q4 2026
Electric Service Point Details	average peak	structured	utility	Planned	Q4 2026
Electric Service Point Details	peak times	structured	utility	Planned	Q4 2026
Electric Service Point Details	load factor	structured	utility	Planned	Q4 2026
Electric Service Point Details	local energy value	structured	utility	Not Planned	
Electric Service Point Details	local capacity value	structured	utility	Not Planned	
Electric Service Point Details	applicable NWA opportunity ID	structured	utility	Acquired	
Electric Service Point Details	measured consumption interval data	structured	utility	Acquired	
Electric Service Point Details	synthesized consumption interval data	structured	utility	Not Planned	
Electric Service Point Details	hosting capacity at service location	structured	utility	Acquired	
Electric Customer Details	account ID	structured	utility	Acquired	
Electric Customer Details	utility ID	structured	utility	Acquired	
Electric Customer Details	service point ID	structured	utility	Acquired	
Electric Customer Details	service class	structured	utility	Acquired	
Electric Customer Details	customer name	structured	utility	Acquired	
Electric Customer Details	postal address	structured	utility	Acquired	
Electric Customer Details	phone number	structured	utility	Acquired	
Electric Customer Details	email address	structured	utility	Not Planned	

Electric Customer Details	current tariff/program ID	structured	utility	Acquired	
Electric Customer Details	monthly billed demand	structured	utility	Acquired	
Electric Customer Details	monthly billed energy	structured	utility	Acquired	
Electric Customer Details	monthly billed service charge	structured	utility	Acquired	
Electric Customer Details	system peak load capacity contribution	structured	utility	Planned	Q4 2026
Electric Customer Details	system peak load transmission contribution	structured	utility	Planned	Q4 2026
Electric Customer Details	North American Industry Classification System (NAICS) code	structured	utility	Acquired	
Electric Customer Details	account start date	structured	utility	Acquired	
Electric Customer Details	account end date	structured	utility	Acquired	
Electric Meter Details	meter ID	structured	utility	Acquired	
Electric Meter Details	service point ID	structured	utility	Acquired	
Electric Meter Details	utility ID	structured	utility	Acquired	
Electric Meter Details	meter manufacturer	structured	utility	Acquired	
Electric Meter Details	meter model	structured	utility	Acquired	
Electric Meter Details	meter serial number	structured	utility	Acquired	
Electric Meter Details	meter configuration profile ID	structured	utility	Acquired	
Electric Meter Details	date installed	structured	utility	Acquired	
Electric Meter Details	date removed	structured	utility	Acquired	
Electric Meter Details	metering service provider ID	structured	utility	Acquired	
Gas Service Point Details	service point ID	structured	utility	Acquired	
Gas Service Point Details	street address	structured	utility	Acquired	
Gas Service Point Details	GIS coordinates	structured	utility	Acquired	
Gas Service Point Details	utility ID	structured	utility	Acquired	
Gas Service Point Details	connected pipeline ID	structured	utility	Acquired	
Gas Service Point Details	interconnection flow rating	structured	utility	Acquired	
Gas Service Point Details	meter ID	structured	utility	Acquired	
Gas Service Point Details	average demand	structured	utility	Planned	Q4 2026
Gas Service Point Details	average demand peak	structured	utility	Planned	Q4 2026

Gas Service Point Details	demand peak times	structured	utility	Planned	Q4 2026
Gas Service Point Details	interconnection load factor	structured	utility	Planned	Q4 2026
Gas Service Point Details	applicable NPA opportunity ID	structured	utility	Acquired	
Gas Service Point Details	measured consumption interval data	structured	utility	Acquired	
Gas Service Point Details	synthesized consumption interval data	structured	utility	Not Planned	
Gas Customer Details	account ID	structured	utility	Acquired	
Gas Customer Details	utility ID	structured	utility	Acquired	
Gas Customer Details	service point ID	structured	utility	Acquired	
Gas Customer Details	service class	structured	utility	Acquired	
Gas Customer Details	customer name	structured	utility	Acquired	
Gas Customer Details	postal address	structured	utility	Acquired	
Gas Customer Details	phone number	structured	utility	Acquired	
Gas Customer Details	email address	structured	utility	Not Planned	
Gas Customer Details	current tariff/program ID	structured	utility	Acquired	
Gas Customer Details	monthly billed demand	structured	utility	Acquired	
Gas Customer Details	monthly billed energy	structured	utility	Acquired	
Gas Customer Details	monthly billed service charge	structured	utility	Acquired	
Gas Customer Details	North American Industry Classification System code	structured	utility	Acquired	
Gas Customer Details	account start date	structured	utility	Acquired	
Gas Customer Details	account end date	structured	utility	Acquired	
Gas Meter Details	meter ID	structured	utility	Acquired	
Gas Meter Details	service point ID	structured	utility	Acquired	
Gas Meter Details	utility ID	structured	utility	Acquired	
Gas Meter Details	meter manufacturer	structured	utility	Acquired	
Gas Meter Details	meter model	structured	utility	Acquired	
Gas Meter Details	meter serial number	structured	utility	Acquired	
Gas Meter Details	meter configuration profile ID	structured	utility	Acquired	
Gas Meter Details	date installed	structured	utility	Acquired	

Gas Meter Details	date removed	structured	utility	Acquired	
Gas Meter Details	metering service provider ID	structured	utility	Acquired	
Steam Service Point Details	service point ID	structured	utility	Acquired	
Steam Service Point Details	street address	structured	utility	Acquired	
Steam Service Point Details	GIS coordinates	structured	utility	Acquired	
Steam Service Point Details	utility ID	structured	utility	Acquired	
Steam Service Point Details	connected pipeline ID	structured	utility	Acquired	
Steam Service Point Details	interconnection rating	structured	utility	Acquired	
Steam Service Point Details	meter ID	structured	utility	Acquired	
Steam Service Point Details	average demand	structured	utility	Planned	Q4 2026
Steam Service Point Details	average demand peak	structured	utility	Planned	Q4 2026
Steam Service Point Details	demand peak times	structured	utility	Planned	Q4 2026
Steam Service Point Details	interconnection load factor	structured	utility	Planned	Q4 2026
Steam Service Point Details	measured consumption interval data	structured	utility	Acquired	
Steam Service Point Details	synthesized consumption interval data	structured	utility	Not Planned	
Steam Customer Details	account ID	structured	utility	Acquired	
Steam Customer Details	utility ID	structured	utility	Acquired	
Steam Customer Details	service point ID	structured	utility	Acquired	
Steam Customer Details	service class	structured	utility	Acquired	
Steam Customer Details	customer name	structured	utility	Acquired	
Steam Customer Details	postal address	structured	utility	Acquired	
Steam Customer Details	phone number	structured	utility	Acquired	
Steam Customer Details	email address	structured	utility	Not Planned	
Steam Customer Details	current tariff/program ID	structured	utility	Acquired	
Steam Customer Details	monthly billed demand	structured	utility	Acquired	
Steam Customer Details	monthly billed energy	structured	utility	Acquired	
Steam Customer Details	monthly billed service charge	structured	utility	Acquired	
Steam Customer Details	North American Industry Classification System code	structured	utility	Acquired	

Steam Customer Details	account start date	structured	utility	Acquired	
Steam Customer Details	account end date	structured	utility	Acquired	
Steam Meter Details	meter ID	structured	utility	Acquired	
Steam Meter Details	service point ID	structured	utility	Acquired	
Steam Meter Details	utility ID	structured	utility	Acquired	
Steam Meter Details	meter manufacturer	structured	utility	Acquired	
Steam Meter Details	meter model	structured	utility	Acquired	
Steam Meter Details	meter serial number	structured	utility	Acquired	
Steam Meter Details	meter configuration profile ID	structured	utility	Acquired	
Steam Meter Details	date installed	structured	utility	Acquired	
Steam Meter Details	date removed	structured	utility	Acquired	
Steam Meter Details	metering service provider ID	structured	utility	Acquired	
Grid Sensor Details	sensor ID	structured	utility	Planned	Q1 2027
Grid Sensor Details	utility ID	structured	utility	Planned	Q1 2027
Grid Sensor Details	circuit ID	structured	utility	Planned	Q1 2027
Grid Sensor Details	nearest service point ID	structured	utility	Planned	Q1 2027
Grid Sensor Details	sensor type	structured	utility	Planned	Q1 2027
Grid Sensor Details	sensor manufacturer	structured	utility	Planned	Q1 2027
Grid Sensor Details	sensor model	structured	utility	Planned	Q1 2027
Grid Sensor Details	sensor configuration profile ID	structured	utility	Planned	Q1 2027
Grid Sensor Details	sensor time-series measurement data	structured	utility	Planned	Q1 2027
Grid Sensor Details	sensor time-stamped event data	structured	utility	Planned	Q1 2027
Grid Sensor Details	date installed	structured	utility	Planned	Q1 2027
Grid Sensor Details	date removed	structured	utility	Planned	Q1 2027
Power Quality Event Details	event ID	structured	utility	Planned	Q1 2027
Power Quality Event Details	utility ID	structured	utility	Planned	Q1 2027
Power Quality Event Details	sensor/meter ID	structured	utility	Planned	Q1 2027
Power Quality Event Details	event type	structured	utility	Planned	Q1 2027
Power Quality Event Details	event beginning date-time	structured	utility	Planned	Q1 2027
Power Quality Event Details	event end date-time	structured	utility	Planned	Q1 2027
Installed DER Details	DER ID	structured	utility	Planned	Q4 2026
Installed DER Details	service point ID	structured	utility	Planned	Q4 2026
Installed DER Details	customer account ID	structured	utility	Planned	Q4 2026
Installed DER Details	site address	structured	utility	Planned	Q4 2026

Installed DER Details	site GIS coordinates	structured	utility	Planned	Q4 2026
Installed DER Details	utility ID	structured	utility	Planned	Q4 2026
Installed DER Details	current tariff/program ID	structured	utility	Planned	Q4 2026
Installed DER Details	DER type	structured	utility	Planned	Q4 2026
Installed DER Details	DER nameplate rating	structured	utility	Planned	Q4 2026
Installed DER Details	inverter type	structured	utility	Planned	Q4 2026
Installed DER Details	inverter nameplate rating	structured	utility	Planned	Q4 2026
Installed DER Details	inverter manufacturer	structured	utility	Planned	Q4 2026
Installed DER Details	inverter model	structured	utility	Planned	Q4 2026
Installed DER Details	inverter configuration	structured	utility	Planned	Q4 2026
Installed DER Details	owner ID	structured	utility	Planned	Q4 2026
Installed DER Details	operator ID	structured	utility	Planned	Q4 2026
Installed DER Details	historical power interval data	structured	utility	Planned	Q4 2026
Installed DER Details	forecast power interval data	structured	utility	Not Planned	
Installed DER Details	synthesized historical power interval data	structured	utility	Not Planned	
Installed DER Details	synthesized interval data	structured	utility	Not Planned	
Installed DER Details	date installed	structured	utility	Planned	Q4 2026
Installed DER Details	date removed	structured	utility	Planned	Q4 2026
Queued DER Details	interconnection request ID	structured	utility	Planned	Q4 2026
Queued DER Details	interconnection queue position	structured	utility	Planned	Q4 2026
Queued DER Details	interconnection status	structured	utility	Planned	Q4 2026
Queued DER Details	utility ID	structured	utility	Planned	Q4 2026
Queued DER Details	circuit ID	structured	utility	Planned	Q4 2026
Queued DER Details	customer account ID	structured	utility	Planned	Q4 2026
Queued DER Details	site address	structured	utility	Planned	Q4 2026
Queued DER Details	site GIS coordinates	structured	utility	Planned	Q4 2026
Queued DER Details	planned current tariff/program ID	structured	utility	Planned	Q4 2026
Queued DER Details	DER type	structured	utility	Planned	Q4 2026
Queued DER Details	DER nameplate rating	structured	utility	Planned	Q4 2026
Queued DER Details	inverter type	structured	utility	Planned	Q4 2026
Queued DER Details	inverter nameplate rating	structured	utility	Planned	Q4 2026
Queued DER Details	inverter manufacturer	structured	utility	Planned	Q4 2026
Queued DER Details	inverter model	structured	utility	Planned	Q4 2026
Queued DER Details	inverter configuration	structured	utility	Planned	Q4 2026
Queued DER Details	owner ID	structured	utility	Planned	Q4 2026
Queued DER Details	operator ID	structured	utility	Planned	Q4 2026
Queued DER Details	forecasted power interval data	structured	utility	Not Planned	

Queued DER Details	planned operational date	structured	utility	Planned	Q4 2026
Forecasted DER Details	forecasted DER ID	structured	utility	Not Planned	
Forecasted DER Details	utility ID	structured	utility	Not Planned	
Forecasted DER Details	circuit ID	structured	utility	Not Planned	
Forecasted DER Details	nearest service point ID	structured	utility	Not Planned	
Forecasted DER Details	nearest service point GIS coordinates	structured	utility	Not Planned	
Forecasted DER Details	forecasted DER type	structured	utility	Not Planned	
Forecasted DER Details	forecasted DER capacity	structured	utility	Not Planned	
Forecasted DER Details	forecasted power interval data	structured	utility	Not Planned	
Forecasted DER Details	forecasted operational date	structured	utility	Not Planned	
Registered Electric Vehicle Details	VIN	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	state registration ID	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	state registration street address	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	GIS coordinates for registration address	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	EV type	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	EV manufacturer	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	EV model	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	EV model year	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	compatible charger type(s)	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	maximum EV charging power (W)	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	EV battery capacity (kWh)	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	efficiency (miles per kWh)	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	estimated annual miles	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	registration start date	structured	non-utility	Planned	Q1 2027
Registered Electric Vehicle Details	registration end date	structured	non-utility	Planned	Q1 2027
Forecasted Electric Vehicle Details	proxy EV ID	structured	non-utility	Not Planned	

Forecasted Electric Vehicle Details	zip code	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	GIS coordinates for zip code post office	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	EV type	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	compatible charger type(s)	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	estimated maximum EV charging power (W)	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	estimated EV battery capacity (kWh)	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	estimated efficiency (miles per kWh)	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	estimated annual miles	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	registration start date	structured	non-utility	Not Planned	
Forecasted Electric Vehicle Details	registration end date	structured	non-utility	Not Planned	
Installed Electric Vehicle Charger Details	charger ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	service point ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	utility ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	owner ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	operator ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	location category	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	street address	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	GIS coordinates	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	charger access category	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	charger class level	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	number of charger ports	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	charger manufacturer	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	charger model	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	nameplate maximum load rating	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	average daily charging events	structured	mixed	Planned	Q1 2027

Installed Electric Vehicle Charger Details	peak daily charging events	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	average charger load	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	average daily peak charger load	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	average time of daily peak load	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	annual peak charger load	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	annual peak charger load date-time	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	meter ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	metering service provider ID	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	metered interval load data	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	date installed	structured	mixed	Planned	Q1 2027
Installed Electric Vehicle Charger Details	date removed	structured	mixed	Planned	Q1 2027
Forecasted Electric Vehicle Charger Details	proxy charger ID	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	nearest service point ID	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	utility ID	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	location category	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	nearest service point street address	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	nearest service point GIS coordinates	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	charger access category	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	charger class level	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	number of charger ports	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	nameplate maximum load rating	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted average daily charging events	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted peak daily charging events	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted average charger load	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted average daily peak charger load	structured	mixed	Not Planned	

Forecasted Electric Vehicle Charger Details	forecasted average time of daily peak load	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted annual peak charger load	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted annual peak charger load date-time	structured	mixed	Not Planned	
Forecasted Electric Vehicle Charger Details	forecasted date installed	structured	mixed	Not Planned	
Registered ICE Vehicle Details	VIN	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	state registration ID	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	state registration street address	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	GIS coordinates for registration address	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	vehicle type	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	vehicle manufacturer	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	vehicle model	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	vehicle model year	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	fuel type	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	fuel efficiency	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	estimated annual miles	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	registration start date	structured	non-utility	Planned	Q1 2027
Registered ICE Vehicle Details	registration end date	structured	non-utility	Planned	Q1 2027
Forecasted ICE Vehicle Details	proxy vehicle ID	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	zip code	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	GIS coordinates for zip code post office	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	vehicle type	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	fuel type	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	estimated fuel efficiency	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	estimated annual miles	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	registration start date	structured	non-utility	Not Planned	
Forecasted ICE Vehicle Details	registration end date	structured	non-utility	Not Planned	
Existing Building Details	building ID	structured	mixed	Planned in P2.5	
Existing Building Details	service point ID	structured	mixed	Planned in P2.5	
Existing Building Details	utility ID	structured	mixed	Planned in P2.5	

Existing Building Details	street address	structured	mixed	Planned in P2.5	
Existing Building Details	GIS coordinates	structured	mixed	Planned in P2.5	
Existing Building Details	building owner	structured	mixed	Planned in P2.5	
Existing Building Details	building property manager	structured	mixed	Planned in P2.5	
Existing Building Details	building type	structured	mixed	Planned in P2.5	
Existing Building Details	building size	structured	mixed	Planned in P2.5	
Existing Building Details	zoning classification	structured	mixed	Planned in P2.5	
Existing Building Details	building energy consumption data - electric	structured	mixed	Planned in P2.5	
Existing Building Details	building energy consumption data - gas	structured	mixed	Planned in P2.5	
Existing Building Details	building energy consumption data - other	structured	mixed	Planned in P2.5	
Forecasted New Building Details	proxy building ID	structured	non-utility	Not Planned	
Forecasted New Building Details	nearest service point ID	structured	non-utility	Not Planned	
Forecasted New Building Details	utility ID	structured	non-utility	Not Planned	
Forecasted New Building Details	street address	structured	non-utility	Not Planned	
Forecasted New Building Details	GIS coordinates	structured	non-utility	Not Planned	
Forecasted New Building Details	building owner	structured	non-utility	Not Planned	
Forecasted New Building Details	building property manager	structured	non-utility	Not Planned	
Forecasted New Building Details	building type	structured	non-utility	Not Planned	
Forecasted New Building Details	building size	structured	non-utility	Not Planned	
Forecasted New Building Details	zoning classification	structured	non-utility	Not Planned	
Forecasted New Building Details	building energy consumption data - electric	structured	non-utility	Not Planned	
Forecasted New Building Details	building energy consumption data - gas	structured	non-utility	Not Planned	

Forecasted New Building Details	building energy consumption data - other	structured	non-utility	Not Planned	
Forecasted Building Modification Details	building ID	structured	non-utility	Not Planned	
Forecasted Building Modification Details	service point ID	structured	non-utility	Not Planned	
Forecasted Building Modification Details	utility ID	structured	non-utility	Not Planned	
Forecasted Building Modification Details	street address	structured	non-utility	Not Planned	
Forecasted Building Modification Details	GIS coordinates	structured	non-utility	Not Planned	
Forecasted Building Modification Details	building owner	structured	non-utility	Not Planned	
Forecasted Building Modification Details	building property manager	structured	non-utility	Not Planned	
Forecasted Building Modification Details	building type	structured	non-utility	Not Planned	
Forecasted Building Modification Details	building size	structured	non-utility	Not Planned	
Forecasted Building Modification Details	zoning classification	structured	non-utility	Not Planned	
Forecasted Building Modification Details	building energy modification type	structured	non-utility	Not Planned	
Forecasted Building Modification Details	forecasted building electricity consumption data	structured	non-utility	Not Planned	
Forecasted Building Modification Details	forecasted building gas consumption data	structured	non-utility	Not Planned	
Forecasted Building Modification Details	forecasted building energy consumption data - other	structured	non-utility	Not Planned	
Digitized Bulk Power Market Details	NYISO tariffs	unstructured	non-utility	Planned	Q1 2027
Digitized Bulk Power Market Details	NYISO DR Manual	unstructured	non-utility	Planned	Q1 2027
Digitized Bulk Power Market Details	NYISO Gold Book	unstructured	non-utility	Planned	Q1 2027
Digitized Bulk Power Market Details	NYISO zone pricing histories	structured	non-utility	Planned	Q1 2027
Digitized Bulk Power Market Details	NYISO transmission node pricing histories	structured	non-utility	Planned	Q1 2027
Digitized Bulk Power Market Details	NYISO DER aggregation rules	unstructured	non-utility	Planned	Q1 2027
Digitized Bulk Power Market Details	NYISO DER participation rules	unstructured	non-utility	Planned	Q1 2027
Digitized Distribution Network Value Details	distribution tariffs	unstructured	non-utility	Acquired	
Digitized Distribution Network Value Details	machine-readable distribution tariffs	structured	utility	Acquired	
Digitized Distribution Network Value Details	distribution rate sheets	unstructured	non-utility	Acquired	

Digitized Distribution Network Value Details	machine-readable distribution rate sheets	structured	utility	Acquired	
Digitized Distribution Network Value Details	demand response program documents	unstructured	mixed	Not Planned	
Digitized Distribution Network Value Details	locational system relief value tables	structured	mixed	Planned	Q1 2027
Digitized Distribution Network Value Details	machine-readable locational system relief value tables	structured	mixed	Planned	Q1 2027
Digitized Distribution Network Value Details	BCA Handbook	unstructured	non-utility	Planned	Q1 2027
Digitized Distribution Network Value Details	value stack calculator link	structured	non-utility	Planned	Q1 2027
Distribution Investment Plan Details	utility ID	structured	utility	Acquired	
Distribution Investment Plan Details	project ID	structured	utility	Acquired	
Distribution Investment Plan Details	substation ID	structured	utility	Acquired	
Distribution Investment Plan Details	circuit ID	structured	utility	Acquired	
Distribution Investment Plan Details	nearest service point ID	structured	utility	Acquired	
Distribution Investment Plan Details	type of service need	structured	utility	Acquired	
Distribution Investment Plan Details	amount of service needed	structured	utility	Acquired	
Distribution Investment Plan Details	project completion date	structured	utility	Acquired	
Distribution Investment Plan Details	estimated wire-based solution cost	structured	utility	Acquired	
Distribution NWA Opportunity Details	utility ID	structured	utility	Acquired	
Distribution NWA Opportunity Details	NWA ID	structured	utility	Acquired	
Distribution NWA Opportunity Details	substation ID	structured	utility	Acquired	
Distribution NWA Opportunity Details	circuit ID	structured	utility	Acquired	
Distribution NWA Opportunity Details	nearest service point ID	structured	utility	Acquired	
Distribution NWA Opportunity Details	type of service need	structured	utility	Acquired	
Distribution NWA Opportunity Details	amount of service needed	structured	utility	Acquired	
Distribution NWA Opportunity Details	service need start date	structured	utility	Acquired	
Distribution NWA Opportunity Details	service need end date	structured	utility	Acquired	
Distribution NWA Opportunity Details	estimated wire-based solution cost	structured	utility	Acquired	

Distribution NWA Opportunity Details	NWA value	structured	utility	Acquired	
Metadata for Digitized Documents & Other Unstructured Data Items	item ID	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	item type	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	item source	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	date most recently published	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	update frequency	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	next scheduled update	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	digitized format	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	web link to current version	structured	tbd	Not Planned	
Metadata for Digitized Documents & Other Unstructured Data Items	web links to previous versions	structured	tbd	Not Planned	