

Integrated Energy Data Resource (IEDR)

IEDR Utility Quarterly Report Q4 2025

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Case 20-M-0082 – In the Matter of the Strategic Use of Energy Related Data

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Internal Use

Table of Contents

Report Scope.....3

Utility Coordination Group3

IEDR Projects and Investments.....6

 People.....6

 Technology.....8

 Processes And Data Transfers.....8

 Process.....8

 Data Transfer Milestones9

Schedule10

Expenditures10

 Summary Budget.....12

Next Steps.....12

Report Scope

New York State Electric & Gas Corporation (“NYSEG”) and Rochester Gas and Electric Corporation (“RG&E” and hereinafter, collectively the “Companies”) submit this Integrated Energy Data Resource (IEDR) quarterly report in compliance with Ordering Clause No. 5 of the Order Implementing an IEDR (the “Order”)¹, where the State of New York Public Service Commission (“Commission”) directed utilities² that:

“each utility shall 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.”

By its January 19, 2024 Order, the Commission extended utility requirements for quarterly and annual reports at the ends of April, July, October and January for the remainder of Phase 1 and for the duration of Phase 2.³ On September 30, 2025, the New York State Department of Public Service Staff issued Updated Guidance for IEDR Reporting. In compliance with these directives, NYSEG and RG&E developed the information contained in this IEDR quarterly report for October 2025 to December 2025 (Q4), providing a status of the ongoing and planned projects and investments in support of the enablement of the IEDR.

Utility Coordination Group

NYSEG and RG&E participate in the Utility Coordination Group (UCG) established by the New York State Energy Research and Development Authority (NYSERDA) and Commission Staff to “provide a venue for collaboration, coordination, and oversight of the utility activities related to the design and implementation of the IEDR and alignment with the schedules and activities of the Data Access Framework proceeding (DAF).”⁴ NYSEDA has retained vendors collectively referred to as the IEDR Program Team (Deloitte Consulting, Pecan Street) and the IEDR Development Team (E-Source, Utility API, FluxTailor, TRC Companies, and HumanLogic).

As noted in the Q2 Progress Report, the IEDR Program Team announced a pause to the formal bi-weekly UCG meetings beginning on May 22 and lasting until August 19. This pause was initiated to refocus efforts on updating data transfer specifications and adjusting program priorities around data acquisition. A key aspect of this approach will be a mapping of current data transfer specifications’ data dictionaries with Appendix B of the IEDR White Paper. This

¹ Case 20-M-0082, Order Implementing an Integrated Energy Data Resource (issued February 11, 2021), p. 39.

² The Joint Utilities (JU) are: Central Hudson Gas & Electric Corporation, Consolidated Edison Company of New York, Inc., New York State Electric & Gas Corporation, Niagara Mohawk Power Corporation d/b/a National Grid, Orange and Rockland Utilities, Inc., Rochester Gas and Electric Corporation, National Fuel Gas Distribution Corporation, St. Lawrence Gas Company, Inc., KeySpan Energy Delivery New York, and KeySpan Energy Delivery Long Island.

³ Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets (issued January 19, 2024), pp. 19-20.

⁴ Case 20-M-0082, Integrated Energy Data Resource Program Consolidated Program Charter Pertaining to the IEDR Steering Committee, Advisory Group, and Utility Coordination Group Final Report (issued August 2021), p. 17.

alignment is necessary to enable data transfer pipelines such as rate plan, customer, and network data and to facilitate data access and use on the IEDR platform.⁵

Furthermore, as noted in the Q3 Progress Report, the IEDR Program Team launched a new UCG subcommittee structure. As noted in the IEDR Charter, The UCG group can establish subcommittees to help support its activities, including the development of data transfer specifications to facilitate data access and use on the IEDR Platform.

“The UCG may establish one or more subcommittees to support its work. A subcommittee may include the participation of individuals who are not themselves UCG members. The UCG will establish a work plan that will define the issues for consideration, tasks, deliverables, and schedule for any subcommittee. The names of the members of the UCG, the meeting schedule, meeting agenda and meeting summaries will be posted on the IEDR Program website. The UCG will continue performing its functions over the life of the IEDR.”⁶

In Q4 2025, the Companies participated in the virtual monthly UCG meeting series on October 14, November 18, and December 9. The meetings covered the topics noted below:

- Discussion and revisions to the UCG Subcommittee Documentation introduced in the third quarter of 2025.
- Introduction to the V005 customer data transfer specification and to the V006 network data transfer specification.
- Introduction and publication of the IEDR Data Transfer Specification Framework, a document developed by the IEDR Team to provide governance around IEDR specification documents and streamline maintenance and release of upcoming specifications.
- General progress checks on the subcommittees, with a focus on the V003 rate plan data ingestion process and questions on the data model for the V005 customer data transfer specification.

The UCG meetings were supplemented by the UCG Subcommittee meetings for the Rate Plan Data, Customer Data, and Network Data pipelines. In addition to the subcommittee activities, the IEDR Development Team shared the updated Data Deposit Dashboard. This tool provides visibility into data ingestion activity across the utilities and was developed to help identify data delivery trends, file-level validation issues, and overall success rates.

A summary of key notes from the UCG Subcommittee meetings are provided below:

⁵ The Program Team noted a focus on “refining data specifications and coordinating the establishment of UCG subcommittees to create the appropriate forums for collaboration.”

⁶ Case 20-M-0082, Integrated Energy Data Resource Program Consolidated Program Charter Pertaining to the IEDR Steering Committee, Advisory Group, and Utility Coordination Group (second version effective September 2023), p. 19.

- *Rate Plan Data Subcommittee meetings were held on October 7, October 21, November 4, November 12, and December 2.⁷ The utilities and IEDR Development Team developed an efficient method for tracking field-level comments to the V003 Rate Plan Data Transfer Specification draft and the data dictionary. Discussions focused on the representation of rate codes in the metadata tables and the data model, formatting sample data sets to test the draft specification, and the timeline to complete the updated V004 specification for the rate plan data pipeline. Separately, the IEDR Development Team shared an updated V003 transfer specification to support utility data transfers. Notably, in Q4, the Companies successfully uploaded the sample data sets to test the draft specification. The current timeline has a goal for January 19 to initiate production-file level transfer of rate plan data to the IEDR platform.*
- *Customer Data Subcommittee meetings were held on October 28, November 19, and December 16. These meetings provided an overview of the V005 customer data transfer specification and the proposed timeline and milestones for the customer data pipeline. The IEDR Development Team noted that the customer data specification is being developed as a potential model for truth tables and mapping tables, and approach aimed at improving schema structure for other data pipelines (rate plan data, network data). Subcommittee meeting discussion focused on treatment of specific issues in the data model, including service point definitions, standardization of date time formats and address fields, and assessment of file naming conventions. The IEDR Program Team reviewed time formats and uniform conventions for the V005 customer data transfer specification and provided an overview of the requested format for date and time fields for data deposits and for file naming conventions.*
- *Network Data Subcommittee held its first meeting on December 10. The meeting introduced the new V006 network data transfer specification and explained the intent to foster a collaborative discussion regarding data submission, privacy, and technical requirements. The IEDR Development Team summarized that the latest specification aims to provide a comprehensive and standardized data model for all utilities and incorporates requested fields from Appendix B. Following the meeting, the IEDR Team updated the data dictionary and Entity Relationship Diagram (ERD), evolving the data model towards a standardized asset-based relationship model. Participants will continue work to assess the usability of the updated data model and data dictionary, clarify mapping of non-wires alternatives and distribution investment plan data to asset layers, and review definitions of advanced data fields in Appendix B for clarity and feasibility.*

⁷ The IEDR Program Team developed the Data Deposit Dashboard tool in Q4, which was discussed in the November 12 Rate Plan Data Subcommittee meeting. This tool was developed to support monitoring of file quality and test activity across the utilities. The dashboard includes a layout filter option to provide the utilities with separate error pie charts by data category (Customer, Rates, DER, Network), and incorporates a percentage display for utility-level success which reflects the success rate for each utility given the selected Date, Utility, and Data Type filters. Another section indicates status, validation/ingestion errors, and other details only for utility test files submissions to enable tracking of progress of test submissions.

IEDR Projects and Investments

People

Role/Title	Responsibilities
Project Director	Oversee IEDR project management activities
Business Project Manager	Coordinate business-side project activities, stakeholder engagement, and ensure compliance with Program requirements
Principal Data Scientist	Lead data science initiatives, develop models and analytics to support project objectives
IT Project Manager	Manage IT-related project tasks and timelines
Business SMEs	Working with project team on data transfer, transfer spec review and adherence
IT SMEs	Support manual data extraction and data transfer
Sr IT Solution Architect	Design and oversee technical architecture, ensure scalability and integration with existing systems
Data Engineers	Data automation and operation
Technical Lead	Provide technical direction, oversee development and implementation of solutions
Data Technical Project Manager	Manage data-related project tasks, coordinate between data teams and stakeholders
Azure & Data Assessment Platform Admin	Administer Azure environment and data platform, ensure security and performance
Scrum Master	Facilitate Agile ceremonies, remove blockers, and support team productivity
Solution Architect - Manager	Lead solution design, ensure alignment with enterprise architecture and business needs
Business Analyst	Gather and analyze business requirements, support documentation and validation
Lead Data Analyst	Oversee data analysis activities, ensure data quality and insights generation

Headcount	Month 1	Month 2	Month 3
FTE's Working on IEDR Activities	5	5	5
Contractors Working on IEDR Activities	12	12	12

During the Q4 2025, NYSEG and RG&E had 5 FTEs as part of the IEDR Implementation team in the roles of Project Director, Business Project Manager (2), Principal Data Scientist and IT Project Manager.

In addition to that headcount, there are also numerous internal resources from different areas collaborating and supporting the IEDR use cases. The IEDR use cases involve data in three domains: Network Data, Customer Data and Tariff data. The Companies IEDR implementation team has been working with the different domain Subject Matter Experts (SMEs) in the areas of:

- Network Data:** The Companies' IEDR Team has collaborated with Interconnection Services, Energy Services, and Electric Transmission Services to collect the data needed for the Large Planned and Installed Distributed Energy Resources Use Cases. To share information related to the various Hosting Capacity maps, SMEs from Electric Distribution Planning have configured the data displayed on the maps. Additionally, SMEs from IT Geographical Information Systems have created the Geographical Database files to be shared with the IEDR Development Team.
- Customer Data:** Customer Data sets require the cooperation of many different areas, such as Business Transformation, Customer Service Center of Excellence, and billing experts. SMEs from Smart Metering have been involved to work on the Interval Consumption Details data set.
- Rate Plan Data:** SMEs from Regulatory and Tariffs have extracted the data required by the Rate Plan Data specifications from the Electric and Gas Tariff Books and generated the files submitted to the IEDR Development Team.
- Finally, it has been necessary to get advisory support and guidance for each Use Case from Legal Services, Cyber Security and Privacy, and Information Technology Architecture.

Additional SMEs will be identified and included in project activities as needed to support the Phase 2 use cases. This collaborative effort and resource allocation demonstrate NYSEG and RG&E's commitment to the successful implementation of the IEDR program.

Technology

The Companies are implementing the deployment of the required technology to support data gathering, transformation, and transport of information to the Integrated Energy Data Resource (IEDR) platform using Azure Synapse and Cloud storage (Data Lake). The architecture is expected to evolve as new requirements are defined by the IEDR Development Team. The integration of NYSEG and RG&E data sets with the Data Lake will be dependent on the selection of IEDR use cases and related data elements. Currently, the integration has been made with the systems to support the data gathering and transformation for the use cases which include but are not limited to Customer Information Systems, Metering Systems, Distributed Generation Databases, ESRI (Hosting Capacity Maps) and Rates and Tariffs plans.

It is crucial that appropriate cybersecurity and privacy protections are designed and implemented as an essential component of this data transfer step.

The Companies continue to coordinate with the JU to standardize processes and technologies where applicable. As the IEDR Administrator continues to define parameters around data provisioning, the Companies expect incremental investment may be necessary.

Processes And Data Transfers

Process

For Phase 2, the Companies continue to follow the below set of 4 processes that were deployed as part of Phase 1. The Companies have been working on the refinement of these 4 processes, applying lessons learned as the data sets are already flowing along this deployment process. Each of the processes defined represents different complexity and challenges.

Process #1: Manual Extraction is initiated once the Development Team has established a data request. This process involves a series of activities such as Data Discovery, system mapping, data digitization (if needed), manual data extraction and transformation, quality check and user acceptance testing, which should end with the transfer of a data set to the Development Team for their feedback. Feedback on the data set is received from the Development Team, and changes may be requested. Depending on the complexity of the data set, multiple meetings and iterations may be needed to produce a data set that meets the use case requirements.

Process #2: Data automation begins once the data set has been accepted by the Development Team. This process oversees the automation of the extraction of data from source systems, loading it into the Data Lake, transforming and consolidating it for the intended analytical use case, and loading it into the IEDR platform. Data processing tasks in the data lake may include filtering, cleansing, de-duplicating, validating, authenticating, performing calculations,

translations, summarizations, conducting audits for data quality and compliance, removing, encrypting, or protecting data, and formatting the data into tables or joined tables to match the target data warehouse schema. This process requires intensive IT (Information Technology) work.

Once the process is automated, it moves to Production as **Process #3**, which runs autonomously. Finally **Process #4**: Change management has been developed due to expected modifications due to changes in internal systems and processes, or requests from the Development Team for increments, enhancements, or enabling different use cases.

Data quality issues discovered during any of those processes launch an internal process where Data Owners are notified so that they can analyze them and take the steps needed to solve them.

NYSEG and RG&E have actively participated in the weekly JU IEDR Information Sharing Working Group, which provide a forum for sharing approaches to data architecture, governance, transfer options, and addressing open questions to guide the development of the IEDR design and implementation. Additionally, the Companies also participate in the JU Legal Working Group meetings to establish a unified approach for legal agreements between the utilities and the IEDR Development Team, as well as to address data transfer processes and considerations related to customer privacy and security. This emphasizes the Companies' commitment to ensuring data governance, cybersecurity, and privacy are prioritized throughout the IEDR implementation process, and actively collaborating with stakeholders to address any challenges and promote progress.

Data Transfer Milestones

New Data Sourcing Work:

During Q4 2025 the Companies successfully delivered the Rate Plan V003 sample data files.

Ongoing Data Transfer Work:

During Q4 2025 the Companies continued the ongoing data transfer efforts for the following deliverables:

- Provided Customer Interval meter data.
- Provided Customer Billing Details data sets.
- Provided Customer Collective Billing data sets.
- Provided daily updates on Customer data sets: Customer Identity Mapping, Service Agreement, Building to Service Point, Service Point to Meter, Billing Details, Collective Billing, SSO, Interval Data.
- Provided regular deposits for Installed and Planned DER with the frequency required and the data requested in the Network Data specifications.

Schedule

The utilities are following the UCG schedule for forthcoming meetings, which are based on a monthly cadence. The January UCG meeting is January 20, 2026.

The IEDR Program Team issued the UCG Subcommittee Documentation which states the utilities should coordinate subcommittee meetings.

Utilities plan to continue organizing and holding meetings for the UCG Subcommittee for Rate Plan Data. The January Rate Plan Data meeting is January 13, 2026.

Utilities plan to continue organizing and holding meetings for the UCG Subcommittee for Customer Data. The January Customer Data meeting is January 14, 2026.

Utilities plan to continue organizing and holding meetings for the UCG Subcommittee for Network Data. The January Network Data meeting is January 27, 2026.

Expenditures

The below tables show the capital expenses associated with implementing IEDR Phase 2 during Q4 2025.

October

Expense Type	Amount	Comments/Details
Internal Labor	\$88,338	Employee costs dedicated to or supporting the IEDR Program
External Services	\$253,462	Contractual labor costs for supporting the IEDR program as well as other external services
Materials	\$0	Hardware, software licensing, hosting, cloud services, etc.
AFUDC	\$52,726	Allowance for funds used during construction and overhead
Other Costs	\$152,729	Overhead costs, misc, travel/supplies, etc.
Total	\$547,255	

November

Expense Type	Amount	Comments/Details
Internal Labor	\$52,980	Employee costs dedicated to or supporting the IEDR Program
External Services	\$214,627	Contractual labor costs for supporting the IEDR program as well as other external services
Materials	\$0	Hardware, software licensing, hosting, cloud services, etc.
AFUDC	\$52,661	Allowance for funds used during construction and overhead
Other Costs	\$115,581	Overhead costs, misc, travel/supplies, etc.
Total	\$435,849	

December

Expense Type	Amount	Comments/Details
Internal Labor	\$86,243	Employee costs dedicated to or supporting the IEDR Program
External Services	\$183,229	Contractual labor costs for supporting the IEDR program as well as other external services
Materials	\$0	Hardware, software licensing, hosting, cloud services, etc.
AFUDC	\$57,932	Allowance for funds used during construction and overhead
Other Costs	\$-155,275	Overhead costs, misc, travel/supplies, etc.
Total	\$172,129	

Summary Budget

The table below shows the capital expenses for Phase 2 incurred to date and the total approved Phase 2 budget.

Expense Type	NYSEG & RG&E Phase 2 Budget	NYSEG & RG&E Phase 2 Spend	% Spent
Internal, Labor	\$4,370,001	\$1,498,387	34.29%
External Services	\$6,620,233	\$5,290,787	79.92%
Materials	\$1,644,282	\$0	0.00%
AFUDC	\$758,911	\$601,126	79.21%
Other Costs	\$1,855,085	\$2,703,627	145.74%
Total	\$15,248,512	\$10,093,927	66.20%

In terms of the contribution of NYSEG and RG&E to the costs of the Program Sponsor, NYSEG and RG&E received the first invoice with accounts payable to NYSERDA via the existing Bill-As-You-Go process related to IEDR Phase 2 in April 2025. The total amount for both Companies included in the invoices related to Phase 2 received until the end of December 2025 is \$3.1M. The Companies expect to receive monthly invoices in the range of \$200k from January 2026 until January 2027.

Next Steps

The Companies plan to continue working with the Joint Utilities and the IEDR Development Team to support the monthly UCG meetings and participate in UCG Subcommittee activities for the rate plan data and the anticipated start for the customer data transfer specification. These efforts will focus on data acquisition and development of data transfer specifications for IEDR Phase 2. Anticipated activities for each of the UCG Subcommittees in Q1 2026 are noted in the bullet points and calendars below.

- To support the Rate Plan Data Subcommittee, the Companies will support the proposed timeline, including efforts to develop an updated V004 specification, test of initial production rate plan data transfers, develop individual utility workplans, and complete the transfer of production-level rate plan data.
- To support the Customer Data Subcommittee, the Companies will support the proposed timeline, including delivery of test files and testing based on the draft specification, collaborate to finalize a production data transfer specification, develop individual utility workplans, and complete the transfer of production data.
- To support the Network Data Subcommittee, the Companies will support the proposed timeline, including a review of the updated data dictionary, identification of reasonable file types and formats for utility data, clarification of mapping of non-wires alternatives

and distribution investment plan data to asset layers, and a review of definitions of advanced data fields in Appendix B for clarity and feasibility.

The Companies expect to work on the following activities during Q1 2026:

- Contribute to the prioritization of the Phase 2 Use Cases and Timeline
- Submit final V003 rate plan transfer specifications delivery
- Continue to review and provide feedback of the V005 customer data transfer specifications and delivery timeline
- Continue to review and provide feedback of the V006 network data transfer specifications and delivery timeline
- Introducing new processes and modifying existing processes to comply with new data transfer specifications
- Delivery on updates of Installed and Planned Distributed Energy Resource and Hosting Capacity maps
- Delivery of UER data
- Delivery of MV-90 data sets
- Continue refining the data sets and processes to create and improve the necessary data sets to support the Phase 2 use cases with the assistance of our System Integration Vendor

January 2026

M	T	W	T	F	S	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February 2026

M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March 2026

M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Key:

	UCG Monthly Meeting
	Rate Plan Data Subcommittee Meeting (scheduled)
	Rate Plan Data Subcommittee Meeting (tentative)
	Customer Data Subcommittee Meeting (scheduled)
	Customer Data Subcommittee Meeting (tentative)
	Network Data Subcommittee Meeting (scheduled)
	Network Data Subcommittee Meeting (tentative)