

IIRG

Flexible Interconnection Subgroup

07/13/2026

Agenda

1. Provide update on a) proposal progress & b) updated proposal timeline
2. Discuss National Flex IX Initiative Financing Forum (July 28)
3. Discuss next steps

Proposal Progress

In-Progress Items

(Update for subgroup review by mid-August 2026)

Topic
Curtailment & Financing Strategy
Curtailment %
Curtailment Allocation Methodology
Curtailment Studies & Reports
Curtailment Risk Management & Financing*
Interconnection Rules
Interconnection Process
Interconnection Agreement
Technical & Operational Requirements
Technical Standards & Guidance
Curtailment Notification & Reporting/EM&V
Site Cost Estimates

Key Deliverables

- **Updated Guidelines Documents**
- **Templates**
 - Curtailment Study
 - Standardized DER Profiles
 - Flex IX ISA Addendum
 - Technical & Operational Requirements

Outstanding Items

Topic
Curtailment & Financing Strategy
Curtailment Risk Management & Financing*
Interconnection Rules
Queue Management
Program Launch/Implementation Plan
DERMS Rollout & Substation Prioritization
Substation Capacity Calculation
Launch process & Communication
Regulatory Approval Process
Other
Standalone Storage
ISO-NE & ASO Studies
Post-upgrade Paradigm & Free Ridership

Proposal Progress

Topic	Summary of Conclusions	Deliverables
Curtailment & Financing Strategy*		
Curtailment %	5%	Memorialized in guidelines document, curtailment study and ISA addendum
Curtailment Allocation Methodology	Pro-rata for all buckets (minimize operational complexity and iterate based on learnings)	Memorialized in guidelines document, curtailment study and ISA addendum
Curtailment Studies & Reports	• Study Assumptions: 75% loading assumption to mitigate over curtailment risk • EDC data access: 3 years 8760 hourly loading data, forecasted curtailment • DER standardized profiles: Required but likely needs multiple profile options to choose from especially for standalone storage	• Study Assumptions: Memorialized in guidelines document, curtailment study and ISA addendum • Standardized Curtailment Study Reports (with cross EDC standardization where possible) • Standardized DER profiles (Industry subgroup to develop)
Curtailment Risk Management & Financing	To be informed by SI2 financing forum	TBD
Interconnection Rules*		
Interconnection Process	Already identified in guidelines document	N/A
Interconnection Agreement	Should include curtailment target, allocation methodology and study assumptions	Standardized Flex IX ISA addendums (with cross EDC standardization where possible)

Proposal Progress

Topic	Summary of Conclusions	Deliverables
Technical & Operational Requirements*		
Technical Standards & Guidance	In development by EDCs	Standardized technical & operational requirements documentation (with cross EDC standardization where possible)
Curtailment Notification & Reporting/EM&V		
Site Cost Estimates		

SS2 Flexible Interconnection Financing Forum

- The Solar and Storage Industries Institute (SI2) is working with industry to develop a National Flexible Interconnection Framework which includes *the goal of developing a standardized framework that enables successful project financing*
- SI2 is hosting a forum for Project Financing: Emerging Interconnection Frameworks on July 28
 - DER industry financing SMEs, financiers and insurance organizations will (a) share learnings on how previous projects were financed and (b) share experiences, challenges and solutions for future projects
- Flex IX IIRG co-chairs propose leveraging lessons learned from this initiative to inform financing proposal and future working sessions

Next Steps

- Financing forum (July 28)
- Co-chairs will share updated guidelines document and templates for subgroup feedback (Mid-august)
 - Review and reconciliation period to follow
- DER subgroup will develop standardized DER profiles (Mid-august)
- Co-chairs will begin work on outstanding topics

Thank You!

