

CHAPTER 25. SUBSTANTIVE RULES APPLICABLE TO ELECTRIC SERVICE PROVIDERS

Subchapter F. METERING.

§25.131. Load Profiling and Load Research.

- (a) **Purpose.** This section allocates responsibilities for obtaining load research information necessary to support the load profiling activities of the Electric Reliability Council of Texas (ERCOT), provides for access to that load profile research data by retail electric providers (REPs), and provides a method for recovery of costs by a person who successfully requests a new load profile.
- (b) **Applicability.** This section applies to ERCOT, each transmission and distribution utility (TDU) that has a service territory within ERCOT, and each REP certified by the commission. For the purposes of this section, the term person may include a municipally owned utility or electric cooperative.
- (c) **Load research responsibility.** Each TDU shall perform load research to support ERCOT's load profiling activities, as directed by ERCOT.
- (1) ERCOT shall be responsible for load research sample design and sample point selection for ERCOT-directed load profiling and load research samples. ERCOT shall coordinate with each TDU to optimize load research programs of both ERCOT and the TDU. The same samples shall be used to support both the TDU's load research activities and ERCOT's load profile research needs whenever reasonably possible. Each TDU shall coordinate with ERCOT to synchronize its load research cycles and sample replacement with those of ERCOT.
 - (2) ERCOT, in consultation with TDUs, shall specify the manner of data collection for ERCOT load profile research samples and the means and frequency of transmission of such information to ERCOT. Each TDU shall adhere to the specifications for data collection and transmission specified by ERCOT.
 - (3) A TDU may recover its reasonable and necessary costs incurred in performing load profile research as required by this section.
 - (4) This section shall not be interpreted to require a TDU to redeploy any existing samples that were deployed less than five years before the effective date of this section, although this section shall also not be interpreted as addressing the appropriateness of continued deployment of existing TDU samples apart from an ERCOT request to do so. Notwithstanding the foregoing, the TDU shall deploy additional samples as requested by ERCOT in order to support ERCOT's load profiling activities.
- (d) **Availability of load research data.** ERCOT shall make load profile research data collected under its direction for accepted load profiles available to all certified REPs.
- (1) Notwithstanding the foregoing, a municipally-owned utility or electric cooperative that conducts load research activities shall have access to load research data maintained by ERCOT only if it shares statistically valid load research data from its own service territory with ERCOT in accordance with the provisions of subparagraphs (A)-(C) of this paragraph.
 - (A) A municipally-owned electric utility or electric cooperative may submit load research data only if it is obtained in a manner consistent with the Association of Edison Illuminating Companies (AEIC) load research standards and provided in the form and manner specified by ERCOT pursuant to subsection (c)(2) of this section.
 - (B) The municipally-owned electric utility or electric cooperative shall provide to ERCOT information concerning its load research sample design and any other relevant information required by ERCOT.
 - (C) ERCOT shall determine whether the load research data submitted by a municipally owned utility or electric cooperative is statistically valid sample data compiled in a manner consistent with the AEIC Load Profiling Guidelines.

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§25.131(d) continued

- (2) ERCOT shall make available customer level data collected under its direction for accepted load profiles for all customers as provided in this subsection, unless ERCOT concludes that due to the size, usage characteristics, or location of a sample, or other factors, there is a significant risk that release of customer level data for a sample would lead to the disclosure of the identity of the customer being sampled. ERCOT shall make available, as provided in this subsection, all other load profile research data on an aggregated basis, unless ERCOT determines that there is significant risk that disclosure of such aggregated data would lead to the disclosure of the identity of one or more sampled customers. In no event shall the location, name, account number, zip code, or electric service identifier (ESI-ID) of an individual customer in a load profile research sample be made available. The following information shall be made available for load profile research data provided on either an individualized or aggregated basis:
 - (A) customer class;
 - (B) TDU service area;
 - (C) weather zone; and
 - (D) interval usage, or average interval usage for aggregated data.
 - (3) ERCOT may not assess a charge to access the data specified in paragraph (2) of this subsection.
- (e) **New load profiles and fee for use of load profiles.** ERCOT may establish new load profiles at the request of a REP or another person.
- (1) A request for a new or modified load profile must include the requested information detailed in ERCOT's Load Profiling Guide.
 - (2) Any costs associated with developing the supporting data and documentation that is necessary for ERCOT's evaluation of the proposed profile change shall be the responsibility of the person initially requesting the profile change.
 - (3) Within six months of the effective date of this section, ERCOT shall establish and implement a process to collect a fee from any REP who seeks to assign customers to a non-ERCOT sponsored profile. The process shall include a method for other REPs who use the profile to compensate the original requester of the new profile and for ERCOT to notify TDUs which REPs are authorized to use the new profile. A TDU shall not, without authorization, assign a customer to a profile for which a REP or another person has paid the costs of developing the new profile.