Appendix A Complete Results and Diagnostic Graphs

## Supply Inputs Sensitivity: Baseline

NYCA Summer Capacity	20	)22	2	026	20	)32
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	26,315	24,322	23,481	21,833	23,485	21,836
Hydro	5,018	4,210	5,018	4,210	5,018	4,210
Nuclear	3,345	3,266	3,345	3,266	2,156	2,105
Onshore Wind	1,739	278	1,983	210	9,698	633
Offshore Wind	0	0	1,200	349	7,591	362
Utility-Scale Solar	56	26	5,056	942	16,669	702
Storage (2h)	592	258	2,156	816	4,264	1,266
Storage (4h)	2	2	9	7	386	229
Net Imports	973	973	973	973	973	973
SCRs	1,185	1,067	1,185	1,185	1,185	1,185
UDRs	1,042	1,042	1,042	1,042	1,042	1,042
Other Resources	2,671	2,541	2,571	2,450	3,251	3,109
TDI	0	0	0	0	0	0
Total	42,939	37,985	48,021	37,283	75,719	37,653

G-J Summer Capacity	2	022	2	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	14,029	12,951	12,306	11,417	12,306	11,417	
Hydro	101	52	101	52	101	52	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	694	202	5,060	241	
Utility-Scale Solar	0	0	0	0	944	40	
Storage (2h)	1	1	1,343	509	1,436	426	
Storage (4h)	0	0	4	3	158	94	
Net Imports	0	0	0	0	0	0	
SCRs	523	470	523	523	523	523	
UDRs	299	299	299	299	299	299	
Other Resources	19	18	75	72	339	328	
TDI	0	0	0	0	0	0	
Total	14,972	13,791	15,345	13,077	21,165	13,420	

## Supply Inputs Sensitivity: Baseline

J Summer Capacity	20	22	20	)26	20	032
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	9,519	8,775	7,796	7,241	7,796	7,240
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	694	202	5,060	241
Utility-Scale Solar	0	0	0	0	0	0
Storage (2h)	1	0	1,342	508	1,433	425
Storage (4h)	0	0	4	3	157	93
Net Imports	0	0	0	0	0	0
SCRs	428	385	428	428	428	428
UDRs	299	299	299	299	299	299
Other Resources	0	0	54	52	239	232
TDI	0	0	0	0	0	0
Total	10,247	9,459	10,618	8,733	15,412	8,959

K Summer Capacity	20	2022		2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	5,148	4,636	4,037	3,681	4,037	3,681	
Hydro	0	0	0	0	0	0	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	506	147	2,531	121	
Utility-Scale Solar	56	26	56	11	56	2	
Storage (2h)	589	257	812	307	1,378	409	
Storage (4h)	2	1	4	3	223	132	
Net Imports	0	0	0	0	0	0	
SCRs	43	39	43	43	43	43	
UDRs	743	743	743	743	743	743	
Other Resources	121	115	157	150	326	314	
TDI	0	0	0	0	0	0	
Total	6,703	5,818	6,357	5,085	9,336	5,445	

## Demand Inputs Sensitivity: Baseline

UCAP Reference Point Price (\$/kW-mo)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	\$9.43	\$8.87	\$8.72	\$9.43	\$8.87	\$8.72
G-J Locality	\$15.12	\$14.84	\$13.84	\$15.12	\$14.84	\$13.84
NYC (J)	\$23.25	\$21.58	\$19.70	\$23.25	\$21.58	\$19.70
LI (K)	\$18.53	\$14.33	\$12.99	\$18.53	\$14.33	\$12.99

UCAP/ICAP Translation Factors (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	12.4%	24.4%	53.2%	11.3%	24.8%	52.8%	
G-J Locality	8.0%	15.6%	38.1%	7.8%	14.9%	36.5%	
NYC (J)	7.8%	19.1%	43.9%	7.7%	18.0%	41.9%	
LI (K)	14.9%	22.8%	45.5%	15.0%	22.2%	44.1%	

UCAP Capacity Requirement (MW)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	34,429	33,284	34,733	34,835	33,122	35,055	
G-J Locality	12,816	11,689	12,499	12,835	11,792	12,810	
NYC (J)	8,397	8,051	8,348	8,405	8,151	8,652	
LI (K)	5,237	5,094	5,546	5,229	5,138	5,691	

UCAP Reserve Margin (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	107.9%	104.9%	98.0%	109.1%	104.4%	98.9%	
G-J Locality	85.7%	79.2%	76.8%	85.9%	79.9%	78.7%	
NYC (J)	77.8%	75.8%	71.5%	77.9%	76.7%	74.1%	
LI (K)	96.9%	93.9%	88.1%	96.7%	94.7%	90.4%	

IRM/LCR (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	123.1%	138.9%	209.6%	123.1%	138.9%	209.6%	
G-J Locality	93.2%	93.9%	123.9%	93.2%	93.9%	123.9%	
NYC (J)	84.4%	93.6%	127.5%	84.4%	93.6%	127.5%	
LI (K)	113.8%	121.7%	161.6%	113.8%	121.7%	161.6%	

#### Outputs Sensitivity: Baseline

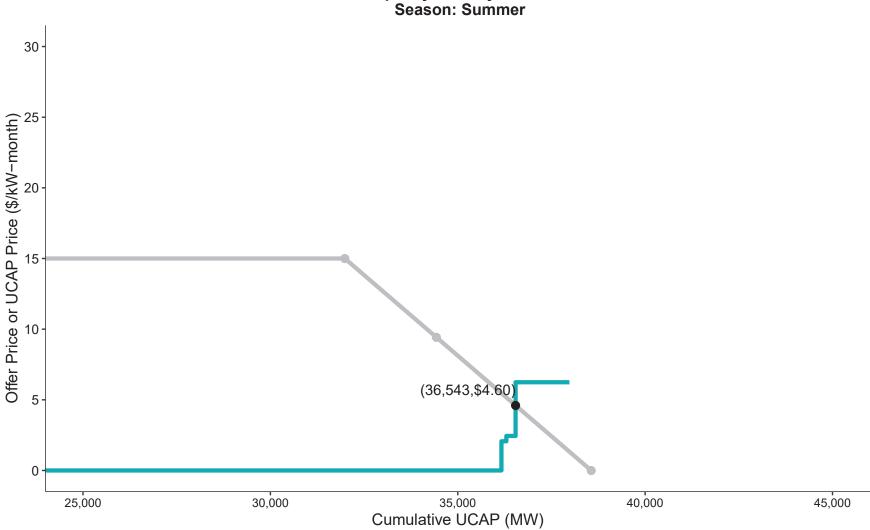
Clearing Prices	Summer			Winter			
(\$/kW-mo)	2022	2026	2032	2022	2026	2032	
NYCA	\$4.60	\$5.07	\$6.89	\$3.33	\$4.23	\$6.28	
G-J Locality	\$7.46	\$9.02	\$9.58	\$3.87	\$5.81	\$7.09	
NYC (J)	\$7.46	\$12.83	\$13.89	\$3.87	\$7.51	\$10.93	
LI (K)	\$7.13	\$14.61	\$14.52	\$3.66	\$12.05	\$13.18	

Clearing UCAP	Summer			Winter			
Quantities (MW)	2022	2026	2032	2022	2026	2032	
NYCA	36,543	34,996	35,607	37,540	35,200	36,234	
G-J Locality	13,791	12,376	13,076	14,268	12,868	13,746	
NYC (J)	9,459	8,638	8,792	9,667	9,107	9,345	
LI (K)	5,817	5,076	5,429	5,985	5,286	5,676	

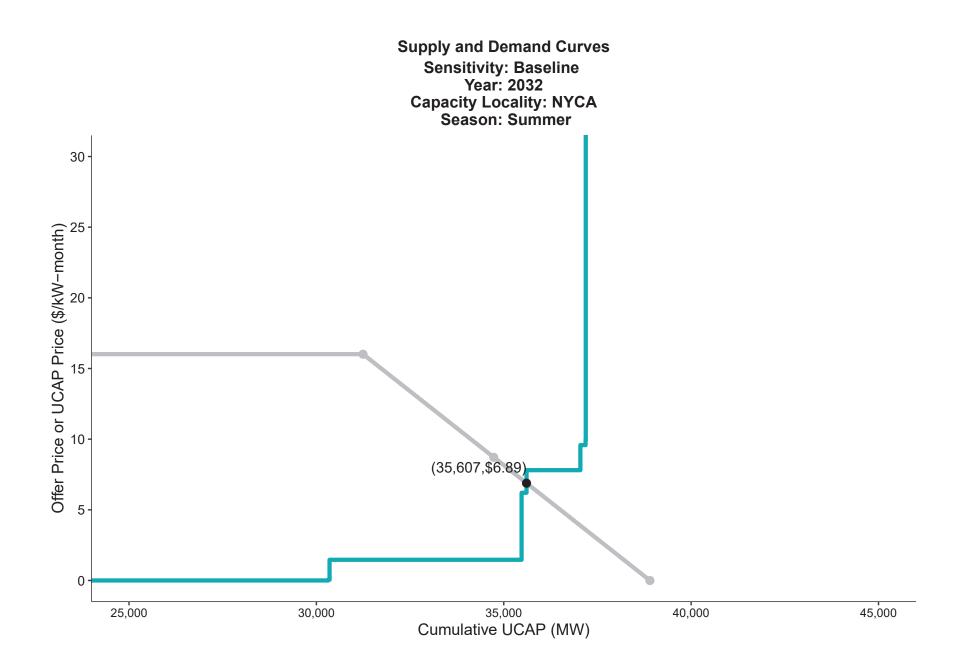
#### Note:

[1] Supply and Demand Curves show "unadjusted" clearing prices. The final clearing price in each capacity locality is the highest price for which capacity segments in that locality are eligible.

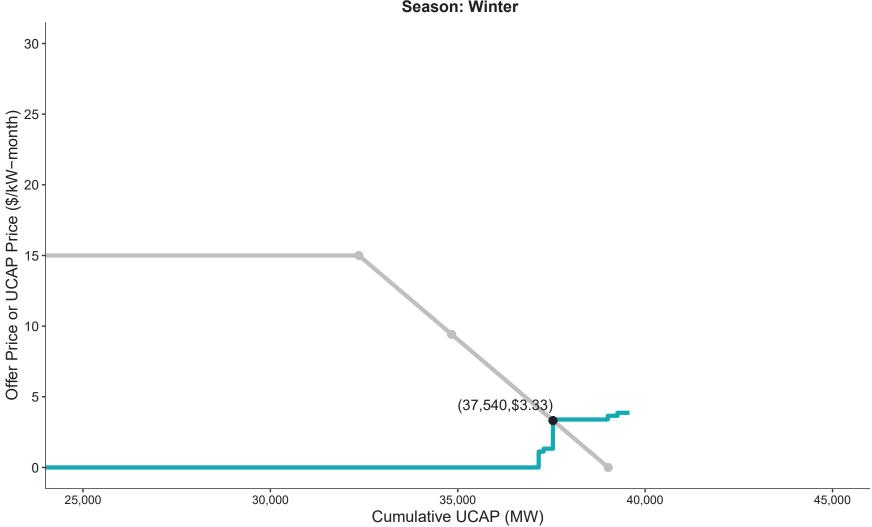
Supply and Demand Curves Sensitivity: Baseline Year: 2022 Capacity Locality: NYCA Season: Summer



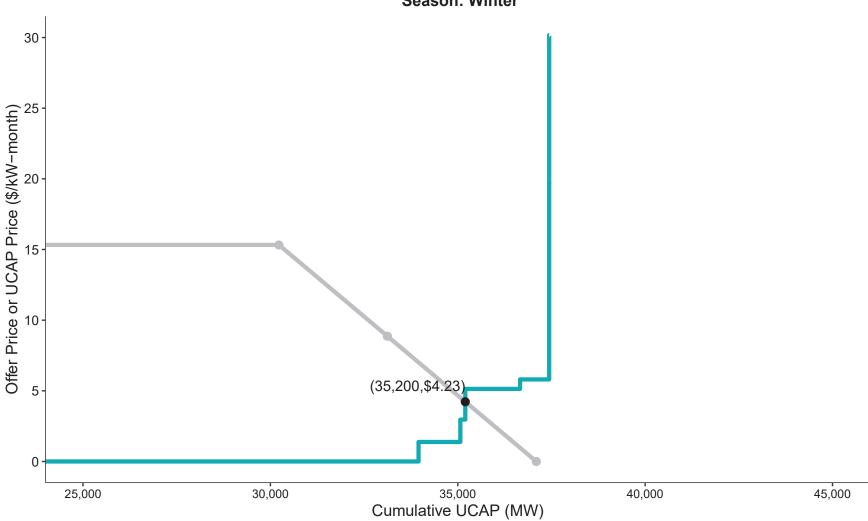
**Supply and Demand Curves** Sensitivity: Baseline Year: 2026 Capacity Locality: NYCA Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (34,996,\$5.07 5 0 30,000 35,000 Cumulative UCAP (MW) 25,000 40,000 45,000

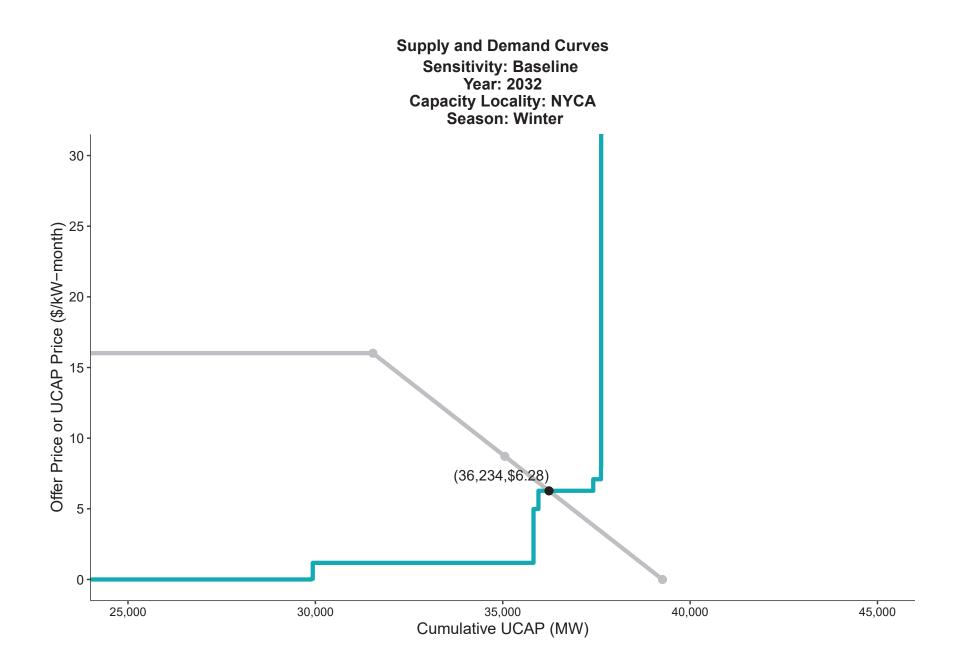


Supply and Demand Curves Sensitivity: Baseline Year: 2022 Capacity Locality: NYCA Season: Winter

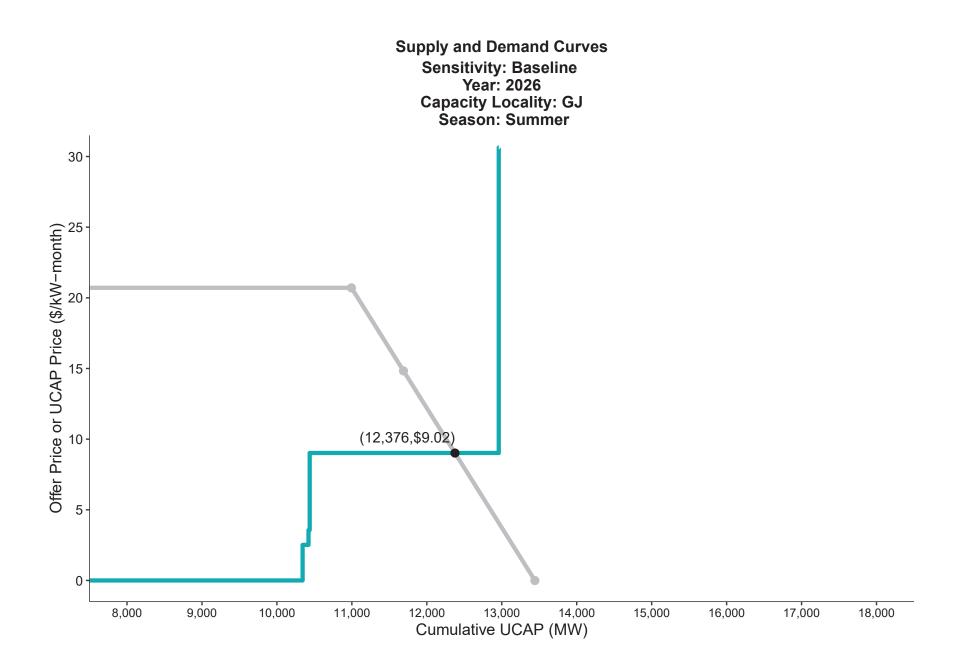


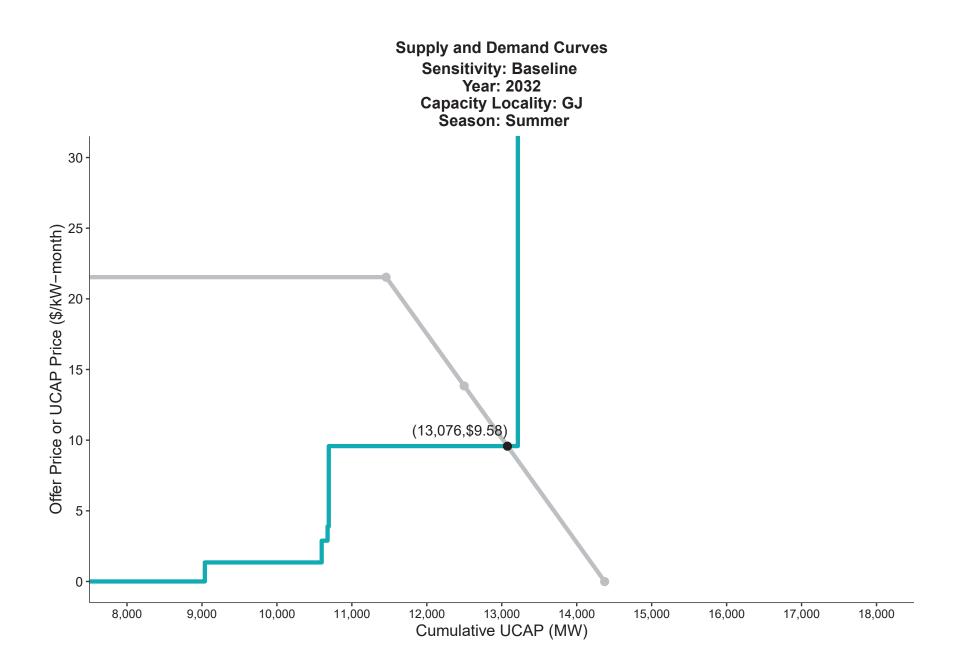
Supply and Demand Curves Sensitivity: Baseline Year: 2026 Capacity Locality: NYCA Season: Winter



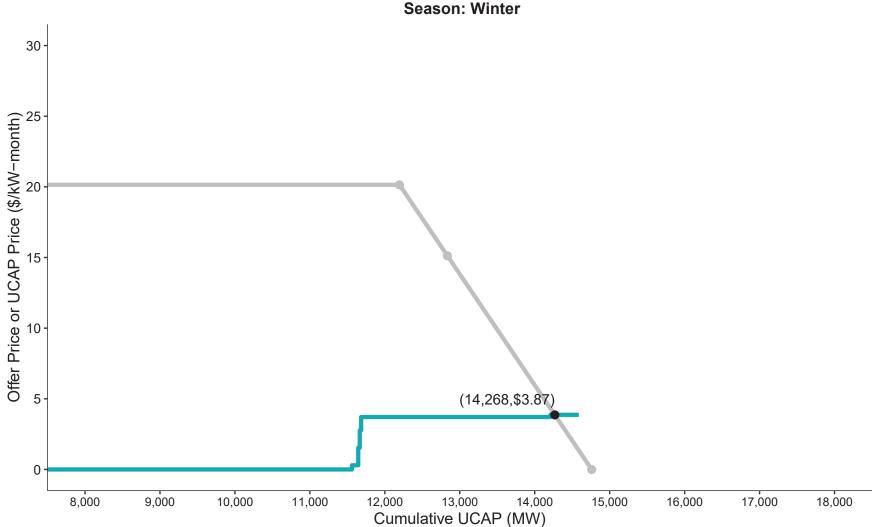


**Supply and Demand Curves** Sensitivity: Baseline Year: 2022 Capacity Locality: GJ Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup> (13,791,\$7.46) 5 0 8,000 9,000 10,000 11,000 12,000 15,000 13,000 14,000 16,000 17,000 18,000 Cumulative UCAP (MW)

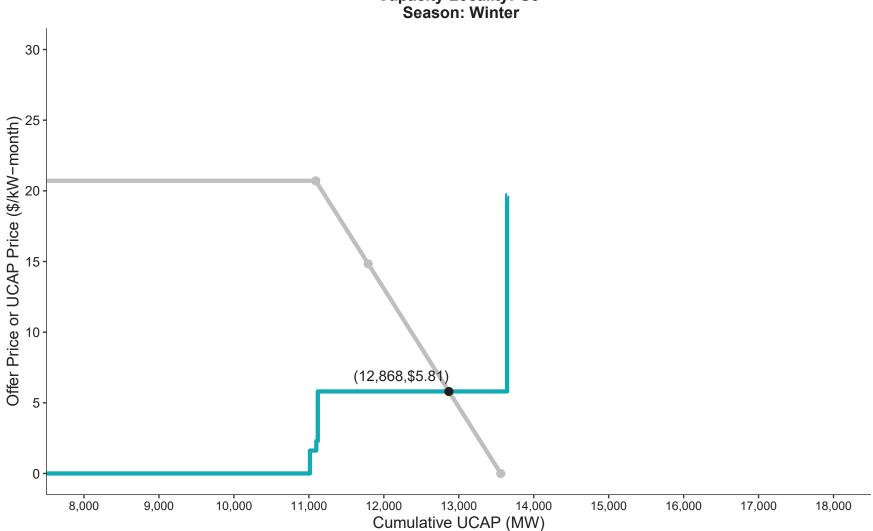


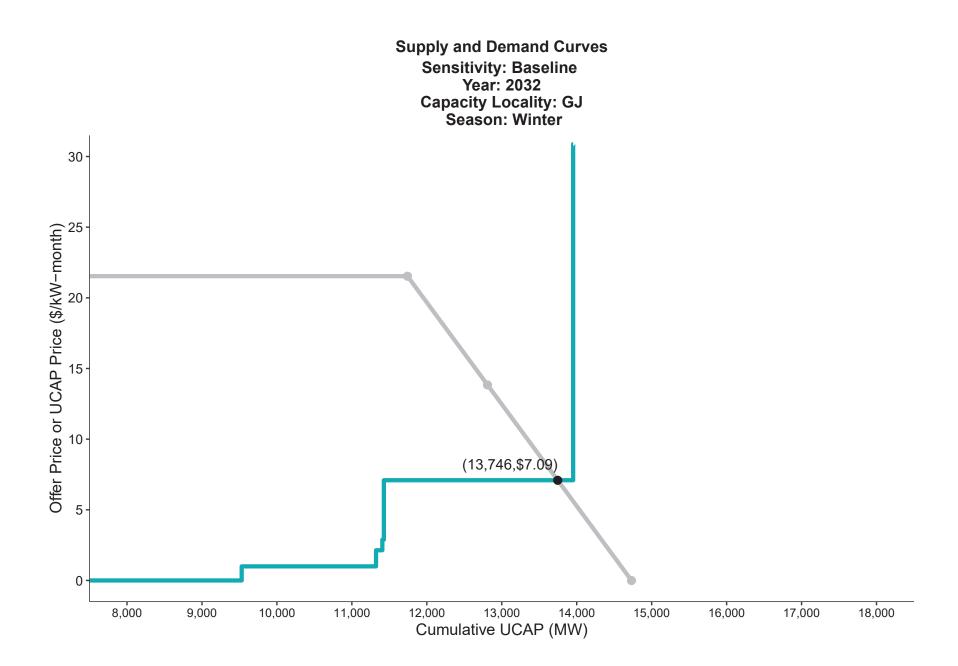


Supply and Demand Curves Sensitivity: Baseline Year: 2022 Capacity Locality: GJ Season: Winter



Supply and Demand Curves Sensitivity: Baseline Year: 2026 Capacity Locality: GJ Season: Winter





**Supply and Demand Curves** Sensitivity: Baseline Year: 2022 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup> (9,459,\$6.91) 5 0 5,000 6,000 9,000 10,000 12,000 3,000 4,000 7,000 8,000 11,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: Baseline Year: 2026 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (8,638,\$12.83) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: Baseline Year: 2032 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (8,792,\$13.89) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: Baseline Year: 2022 Capacity Locality: J Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup> 5 (9,667,\$3.87) 0 7,000 8,000 Cumulative UCAP (MW) 5,000 6,000 9,000 10,000 12,000 3,000 4,000 11,000

**Supply and Demand Curves** Sensitivity: Baseline Year: 2026 Capacity Locality: J Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup> (9,107,\$7.51) 5 0. 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: Baseline Year: 2032 Capacity Locality: J Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (9,345,\$10.93) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: Baseline Year: 2022 Capacity Locality: K Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (5,817,\$7.13) 5 0 2,000 3,000 4,000 Cumulative UCAP (MW) 6,000 7,000

**Supply and Demand Curves** Sensitivity: Baseline Year: 2026 Capacity Locality: K Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (5,076,\$14.61) 5 0 2,000 3,000 4,000 5,000 Cumulative UCAP (MW) 6,000 7,000

**Supply and Demand Curves** Sensitivity: Baseline Year: 2032 Capacity Locality: K Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (5,429,\$14.52) 5 0. 2,000 3,000 4,000 Cumulative UCAP (MW) 6,000 7,000

**Supply and Demand Curves** Sensitivity: Baseline Year: 2022 Capacity Locality: K Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> 5 (5,985,\$3.66) 0 2,000 3,000 4,000 5,000 6,000 7,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: Baseline Year: 2026 Capacity Locality: K Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (5,286,\$12.05) 5 0 2,000 3,000 4,000 Cumulative UCAP (MW) 6,000 7,000

**Supply and Demand Curves** Sensitivity: Baseline Year: 2032 Capacity Locality: K Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (5,676,\$13.18) 5 0. 3,000 4,000 5,000 Cumulative UCAP (MW) 6,000 7,000 2,000

## Supply Inputs Sensitivity: TDI Transmission Addition

NYCA Summer Capacity	20	)22	20	)26	20	)32
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	26,315	24,322	23,481	21,833	23,485	21,836
Hydro	5,018	4,210	5,018	4,210	5,018	4,210
Nuclear	3,345	3,266	3,345	3,266	2,156	2,105
Onshore Wind	1,739	278	1,983	210	9,698	633
Offshore Wind	0	0	1,200	349	7,591	362
Utility-Scale Solar	56	26	5,056	942	16,669	702
Storage (2h)	592	258	2,156	816	4,264	1,266
Storage (4h)	2	2	9	7	386	229
Net Imports	973	973	973	973	973	973
SCRs	1,185	1,067	1,185	1,185	1,185	1,185
UDRs	1,042	1,042	1,042	1,042	1,042	1,042
Other Resources	2,671	2,541	2,571	2,450	3,251	3,109
TDI	0	0	1,250	1,188	1,250	1,188
Total	42,939	37,985	49,271	38,471	76,969	38,840

G-J Summer Capacity	2	2022		2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	14,029	12,951	12,306	11,417	12,306	11,417	
Hydro	101	52	101	52	101	52	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	694	202	5,060	241	
Utility-Scale Solar	0	0	0	0	944	40	
Storage (2h)	1	1	1,343	509	1,436	426	
Storage (4h)	0	0	4	3	158	94	
Net Imports	0	0	0	0	0	0	
SCRs	523	470	523	523	523	523	
UDRs	299	299	299	299	299	299	
Other Resources	19	18	75	72	339	328	
TDI	0	0	1,250	1,188	1,250	1,188	
Total	14,972	13,791	16,595	14,264	22,415	14,607	

## Supply Inputs Sensitivity: TDI Transmission Addition

J Summer Capacity	20	)22	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	9,519	8,775	7,796	7,241	7,796	7,240
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	694	202	5,060	241
Utility-Scale Solar	0	0	0	0	0	0
Storage (2h)	1	0	1,342	508	1,433	425
Storage (4h)	0	0	4	3	157	93
Net Imports	0	0	0	0	0	0
SCRs	428	385	428	428	428	428
UDRs	299	299	299	299	299	299
Other Resources	0	0	54	52	239	232
TDI	0	0	1,250	1,188	1,250	1,188
Total	10,247	9,459	11,868	9,921	16,662	10,147

K Summer Capacity	2	2022		2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	5,148	4,636	4,037	3,681	4,037	3,681	
Hydro	0	0	0	0	0	0	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	506	147	2,531	121	
Utility-Scale Solar	56	26	56	11	56	2	
Storage (2h)	589	257	812	307	1,378	409	
Storage (4h)	2	1	4	3	223	132	
Net Imports	0	0	0	0	0	0	
SCRs	43	39	43	43	43	43	
UDRs	743	743	743	743	743	743	
Other Resources	121	115	157	150	326	314	
TDI	0	0	0	0	0	0	
Total	6,703	5,818	6,357	5,085	9,336	5,445	

# Demand Inputs Sensitivity: TDI Transmission Addition

UCAP Reference Point Price (\$/kW-mo)	Summer			Winter		
	2022	2026	2032	2032 2022	2026	2032
NYCA	\$9.43	\$8.87	\$8.72	\$9.43	\$8.87	\$8.72
G-J Locality	\$15.12	\$14.84	\$13.84	\$15.12	\$14.84	\$13.84
NYC (J)	\$23.25	\$21.58	\$19.70	\$23.25	\$21.58	\$19.70
LI (K)	\$18.53	\$14.33	\$12.99	\$18.53	\$14.33	\$12.99

UCAP/ICAP Translation Factors (%)		Summer			Winter		
UCAP/ICAP Translation Factors (76)	2022	2026	2032	2022	2026	2032	
NYCA	12.4%	24.4%	53.2%	11.3%	24.8%	52.8%	
G-J Locality	8.0%	15.6%	38.1%	7.8%	14.9%	36.5%	
NYC (J)	7.8%	19.1%	43.9%	7.7%	18.0%	41.9%	
LI (K)	14.9%	22.8%	45.5%	15.0%	22.2%	44.1%	

LICAR Consoity Requirement (MM)		Summer			Winter		
UCAP Capacity Requirement (MW)	2022	2026	2032	2022	22 2026	2032	
NYCA	34,429	33,284	34,733	34,835	33,122	35,055	
G-J Locality	12,816	11,689	12,499	12,835	11,792	12,810	
NYC (J)	8,397	8,051	8,348	8,405	8,151	8,652	
LI (K)	5,237	5,094	5,546	5,229	5,138	5,691	

UCAP Reserve Margin (%)		Summer			Winter		
OCAP Reserve Margin (76)	2022	2022 2026 20	2032	2022	2026	2032	
NYCA	107.9%	104.9%	98.0%	109.1%	104.4%	98.9%	
G-J Locality	85.7%	79.2%	76.8%	85.9%	79.9%	78.7%	
NYC (J)	77.8%	75.8%	71.5%	77.9%	76.7%	74.1%	
LI (K)	96.9%	93.9%	88.1%	96.7%	94.7%	90.4%	

IRM/LCR (%)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	123.1%	138.9%	209.6%	123.1%	138.9%	209.6%
G-J Locality	93.2%	93.9%	123.9%	93.2%	93.9%	123.9%
NYC (J)	84.4%	93.6%	127.5%	84.4%	93.6%	127.5%
LI (K)	113.8%	121.7%	161.6%	113.8%	121.7%	161.6%

#### Outputs Sensitivity: TDI Transmission Addition

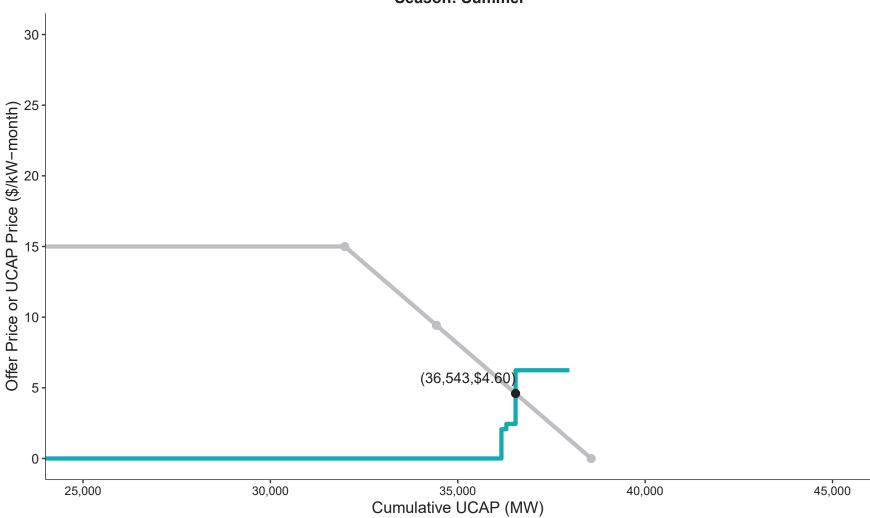
Clearing Prices	Summer			Winter		
(\$/kW-mo)	2022	2026	2032	2022	2026	2032
NYCA	\$4.60	\$5.07	\$6.89	\$3.33	\$4.23	\$6.28
G-J Locality	\$7.46	\$9.02	\$9.58	\$3.87	\$5.81	\$7.09
NYC (J)	\$7.46	\$9.02	\$9.58	\$3.87	\$6.05	\$7.36
LI (K)	\$7.13	\$14.61	\$14.52	\$3.66	\$12.05	\$13.18

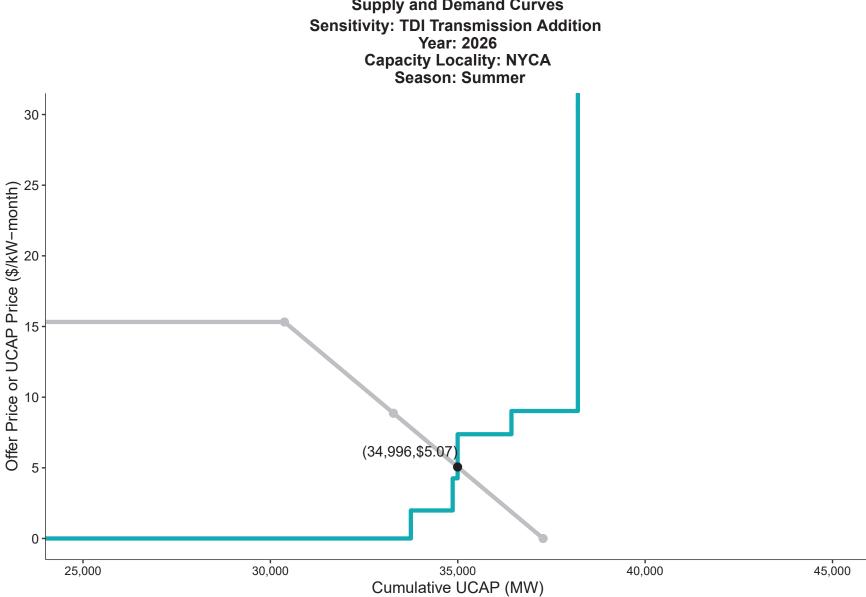
Clearing UCAP	Summer			Winter		
Quantities (MW)	2022	2026	2032	2022	2026	2032
NYCA	36,543	34,996	35,607	37,540	35,200	36,234
G-J Locality	13,791	12,376	13,076	14,268	12,868	13,746
NYC (J)	9,459	8,920	9,143	9,667	9,207	9,628
LI (K)	5,817	5,076	5,429	5,985	5,286	5,676

#### Note:

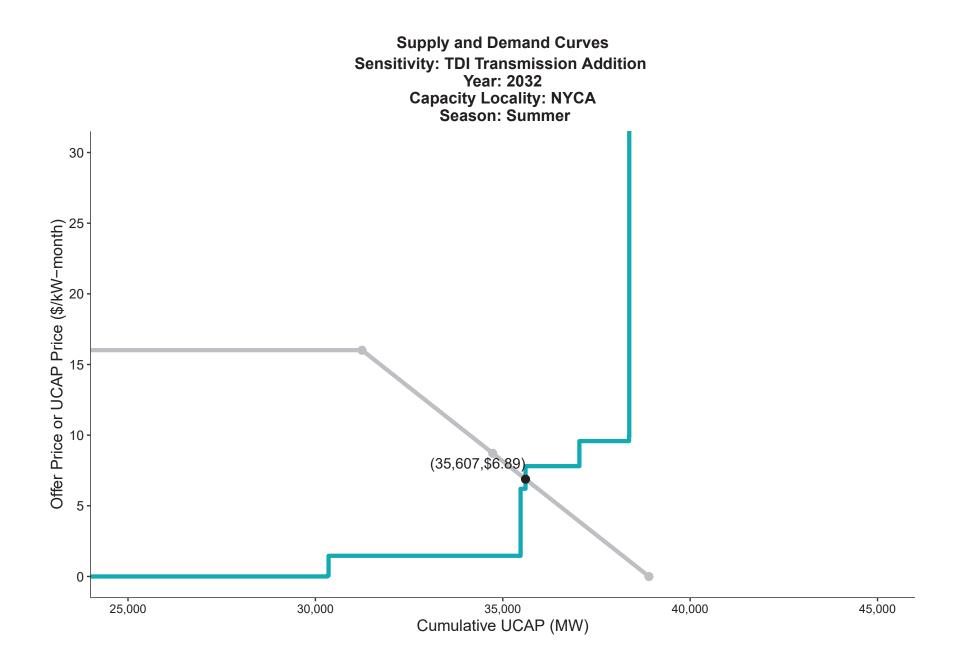
[1] Supply and Demand Curves show "unadjusted" clearing prices. The final clearing price in each capacity locality is the highest price for which capacity segments in that locality are eligible.

Supply and Demand Curves Sensitivity: TDI Transmission Addition Year: 2022 Capacity Locality: NYCA Season: Summer

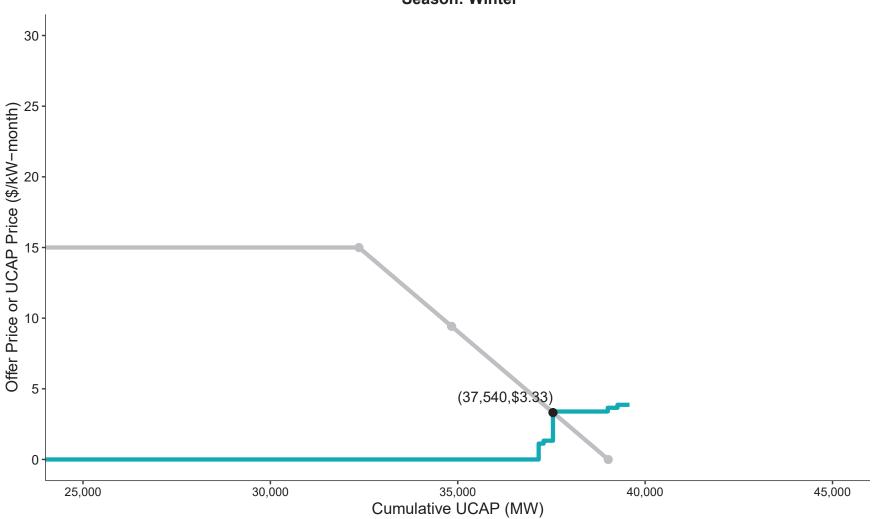




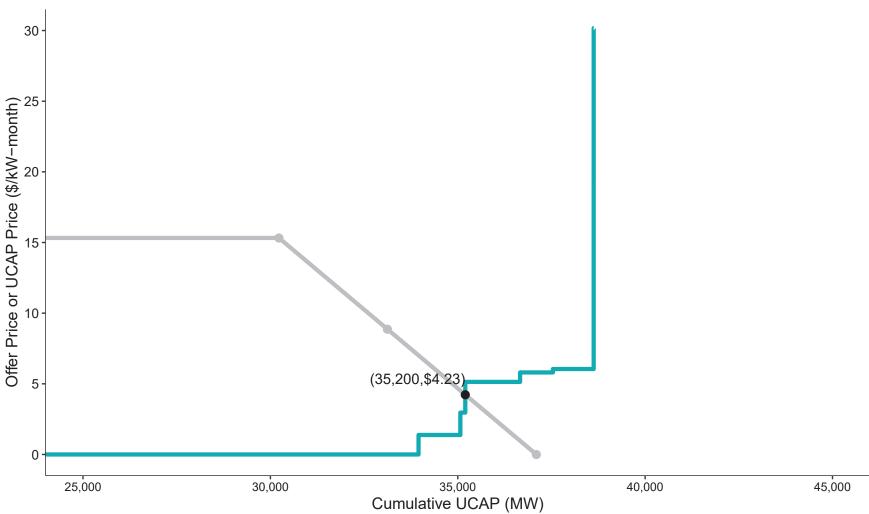
# **Supply and Demand Curves**

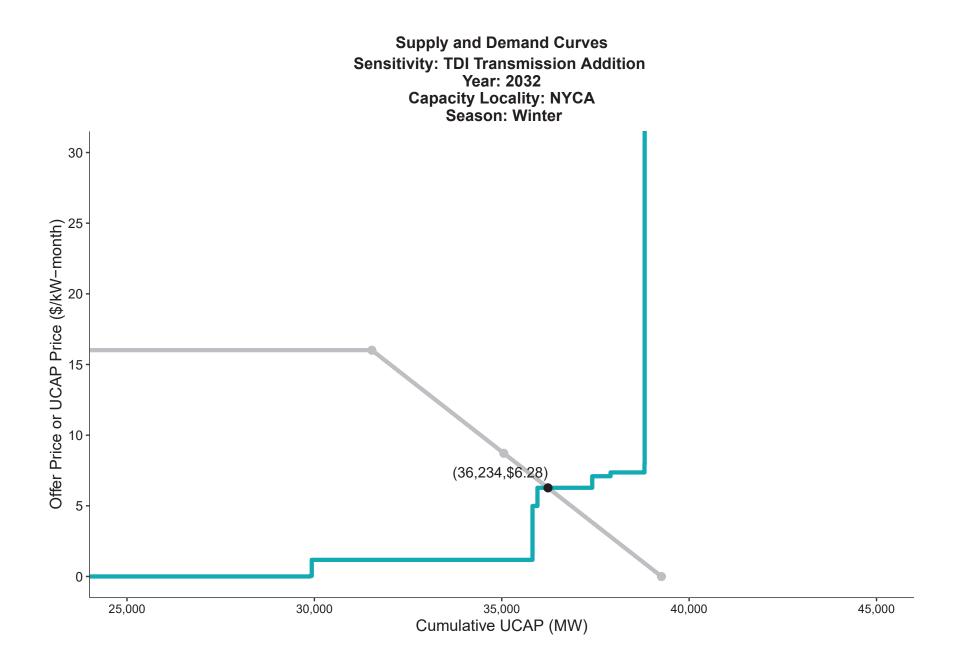


Supply and Demand Curves Sensitivity: TDI Transmission Addition Year: 2022 Capacity Locality: NYCA Season: Winter



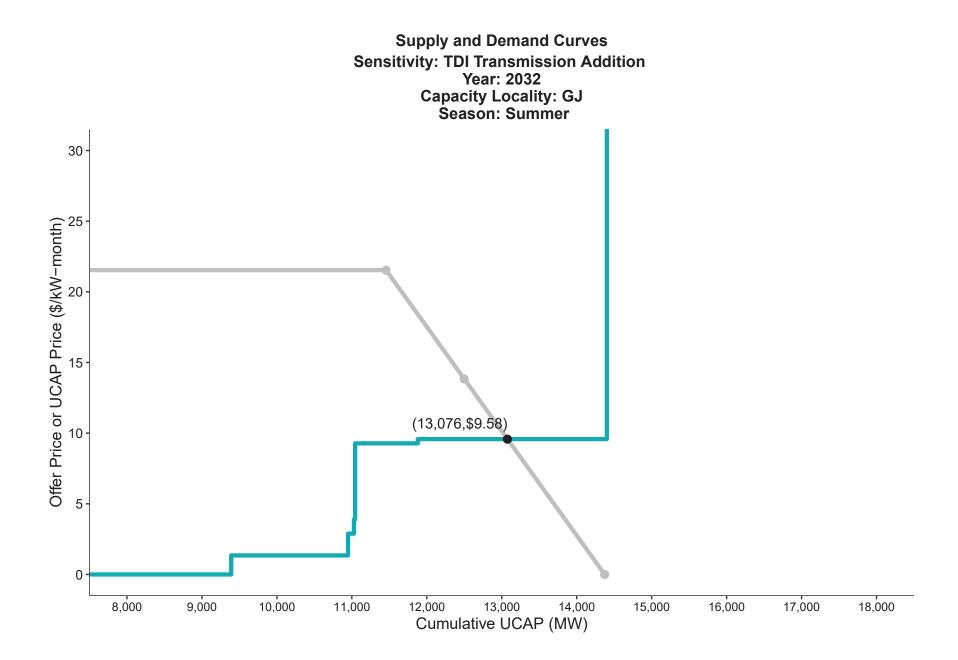
Supply and Demand Curves Sensitivity: TDI Transmission Addition Year: 2026 Capacity Locality: NYCA Season: Winter



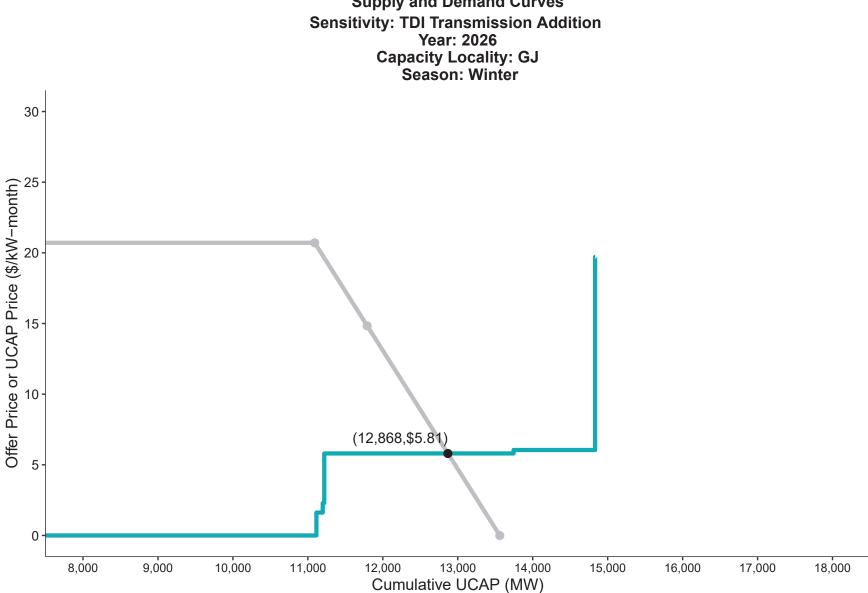


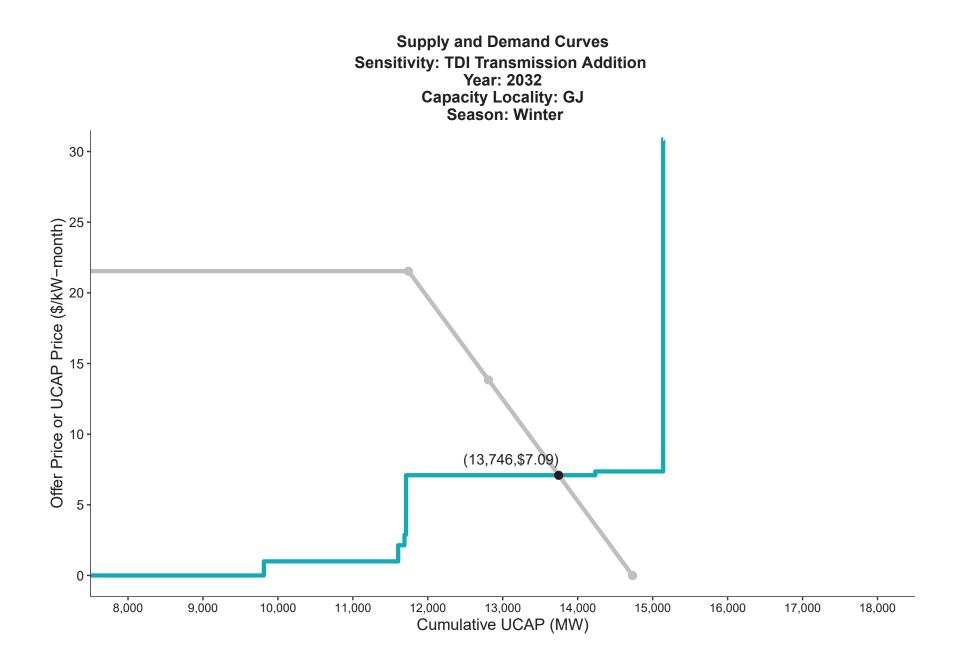
**Supply and Demand Curves** Sensitivity: TDI Transmission Addition Year: 2022 Capacity Locality: GJ Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup> (13,791,\$7.46) 5 0 9,000 10,000 12,000 15,000 8,000 11,000 13,000 16,000 17,000 18,000 14,000 Cumulative UCAP (MW)

Sensitivity: TDI Transmission Addition Year: 2026 Capacity Locality: GJ Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (12,376,\$9.02) 5 0 9,000 10,000 12,000 8,000 11,000 13,000 15,000 17,000 18,000 14,000 16,000 Cumulative UCAP (MW)

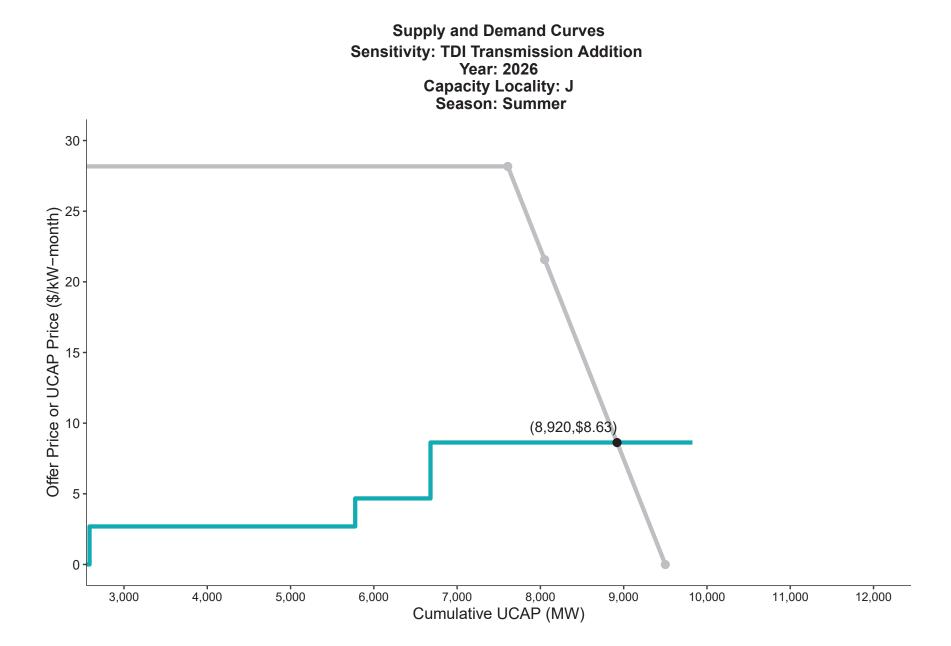


**Supply and Demand Curves** Sensitivity: TDI Transmission Addition Year: 2022 Capacity Locality: GJ Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup> (14,268,\$3.87) 5 0 9,000 12,000 15,000 8,000 10,000 11,000 13,000 16,000 17,000 18,000 14,000 Cumulative UCAP (MW)

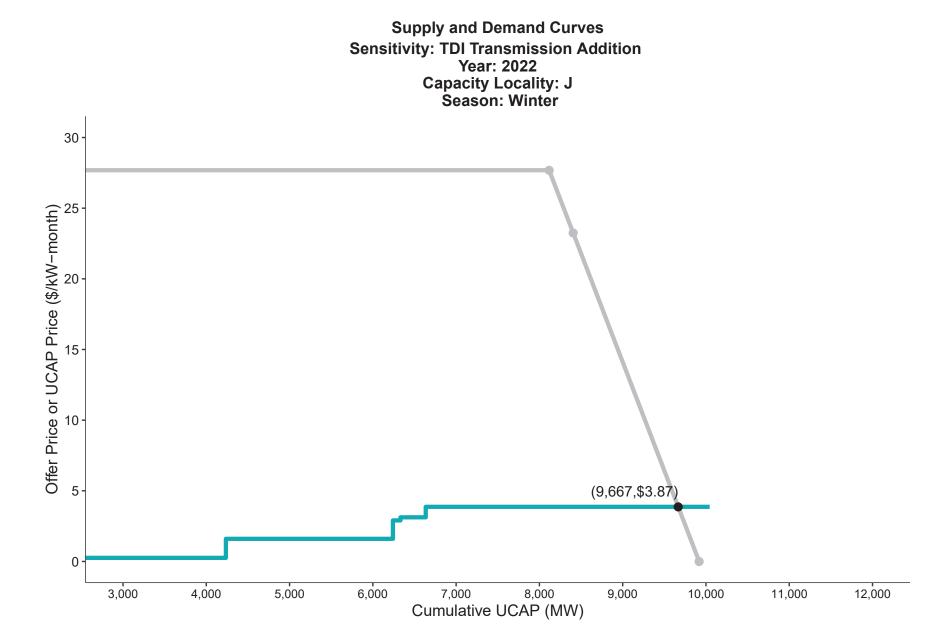


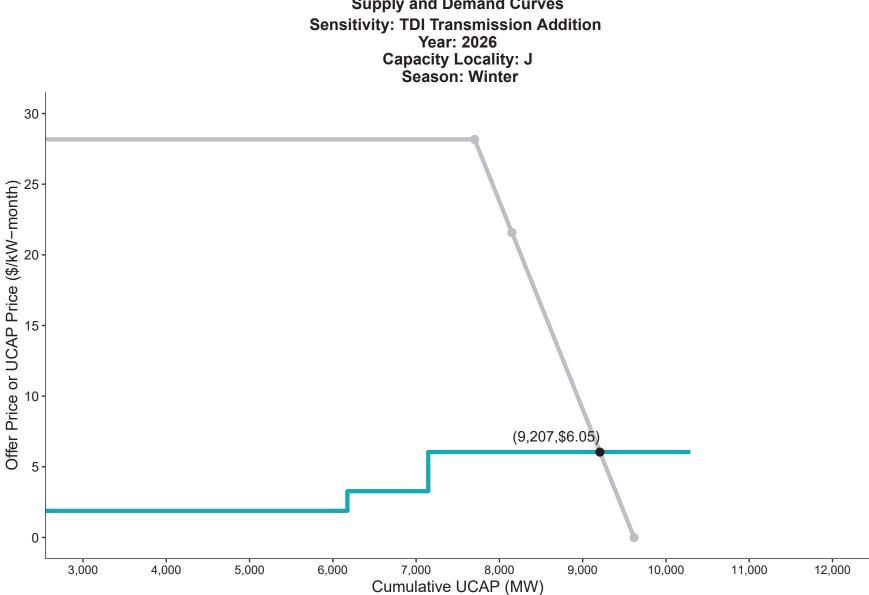


**Supply and Demand Curves** Sensitivity: TDI Transmission Addition Year: 2022 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
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<sup>2</sup> (9,459,\$6.91) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

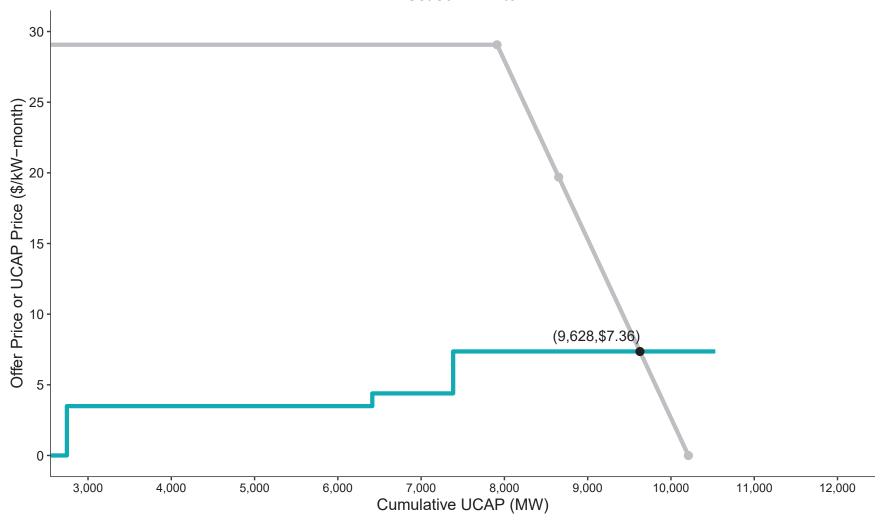


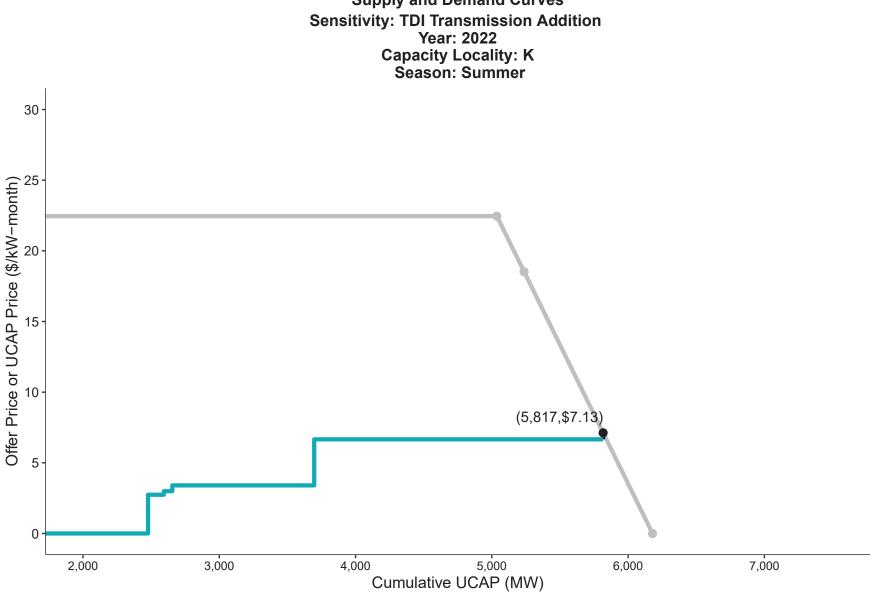
**Supply and Demand Curves** Sensitivity: TDI Transmission Addition Year: 2032 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (9,143,\$9.28) 5 0 6,000 9,000 10,000 3,000 4,000 5,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

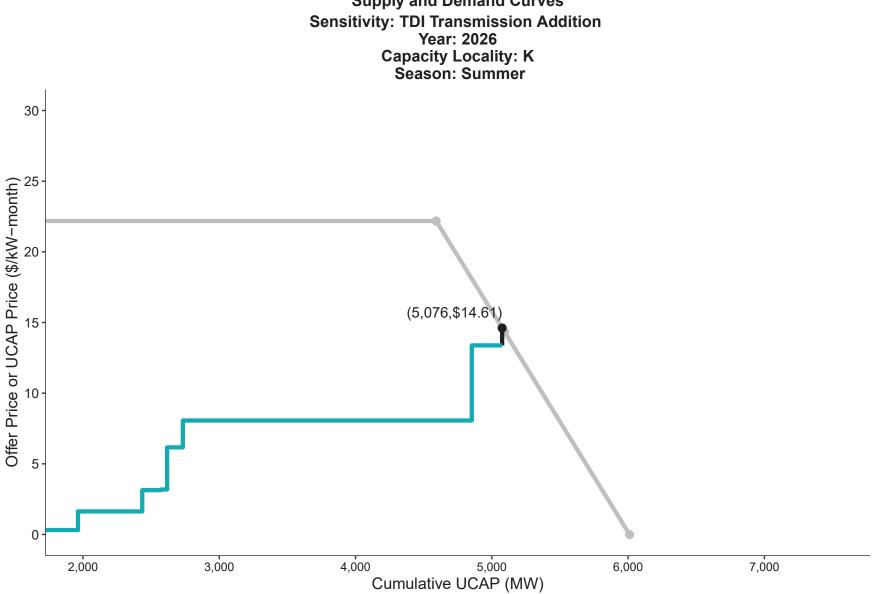




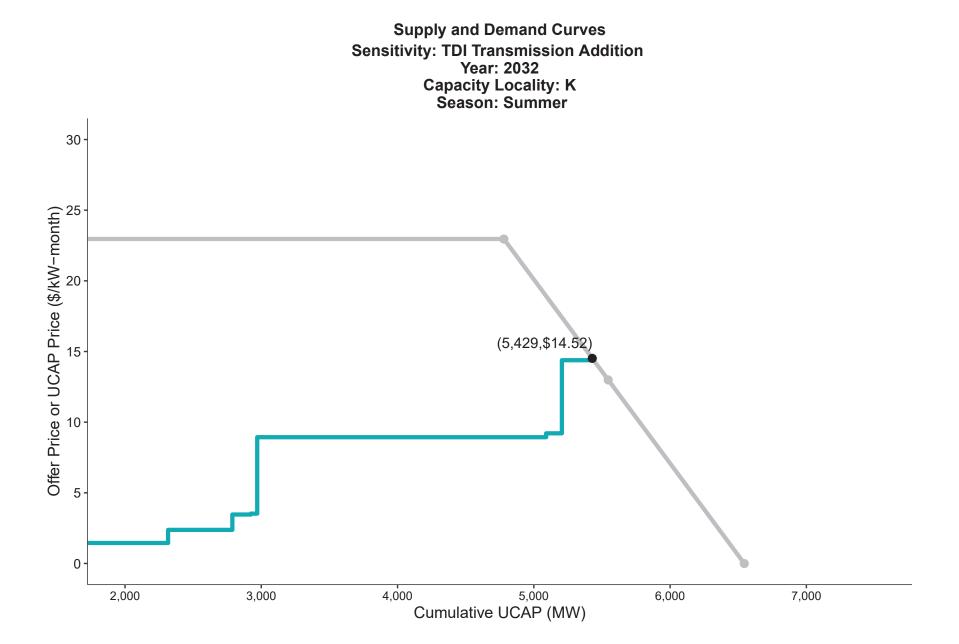
Supply and Demand Curves Sensitivity: TDI Transmission Addition Year: 2032 Capacity Locality: J Season: Winter

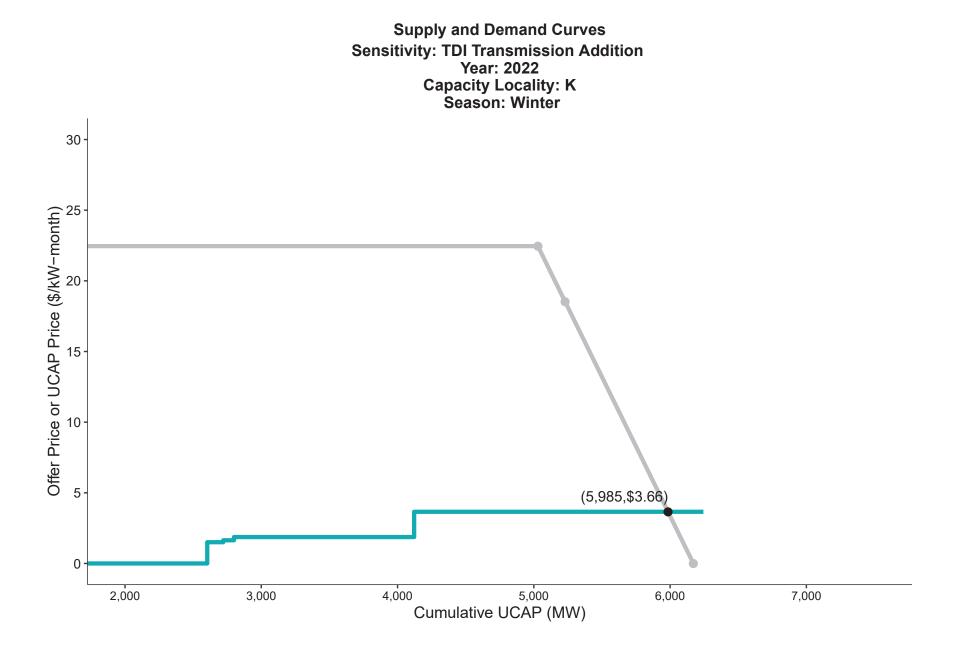


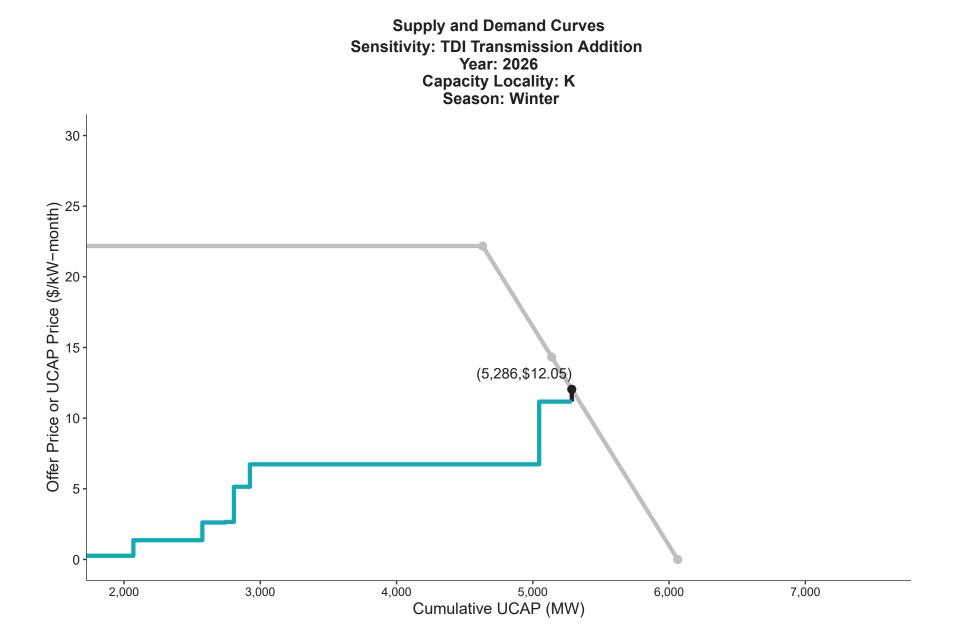


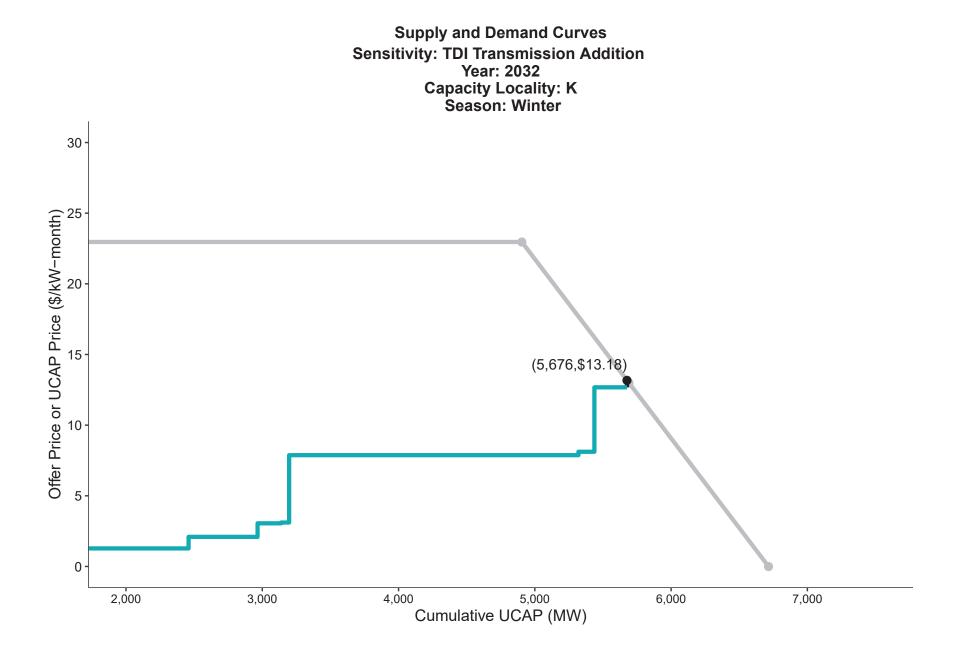


**Supply and Demand Curves** 









### Supply Inputs Sensitivity: CPNY Transmission Addition

NYCA Summer Capacity	20	)22	2	026	20	)32
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	26,315	24,322	23,481	21,833	23,485	21,836
Hydro	5,018	4,210	5,018	4,210	5,018	4,210
Nuclear	3,345	3,266	3,345	3,266	2,156	2,105
Onshore Wind	1,739	278	1,983	210	9,698	633
Offshore Wind	0	0	1,200	349	7,591	362
Utility-Scale Solar	56	26	5,056	942	16,669	702
Storage (2h)	592	258	2,156	816	4,264	1,266
Storage (4h)	2	2	9	7	386	229
Net Imports	973	973	973	973	973	973
SCRs	1,185	1,067	1,185	1,185	1,185	1,185
UDRs	1,042	1,042	1,042	1,042	1,042	1,042
Other Resources	2,671	2,541	2,571	2,450	3,251	3,109
TDI	0	0	0	0	0	0
Total	42,939	37,985	48,021	37,283	75,719	37,653

G-J Summer Capacity	2	022	2	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	14,029	12,951	12,306	11,417	12,306	11,417	
Hydro	101	52	101	52	101	52	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	694	202	5,060	241	
Utility-Scale Solar	0	0	0	0	944	40	
Storage (2h)	1	1	1,343	509	1,436	426	
Storage (4h)	0	0	4	3	158	94	
Net Imports	0	0	0	0	0	0	
SCRs	523	470	523	523	523	523	
UDRs	299	299	299	299	299	299	
Other Resources	19	18	75	72	339	328	
TDI	0	0	0	0	0	0	
Total	14,972	13,791	15,345	13,077	21,165	13,420	

### Supply Inputs Sensitivity: CPNY Transmission Addition

J Summer Capacity	20	)22	20	)26	2	032
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	9,519	8,775	7,796	7,241	7,796	7,240
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	694	202	5,060	241
Utility-Scale Solar	0	0	0	0	0	0
Storage (2h)	1	0	1,342	508	1,433	425
Storage (4h)	0	0	4	3	157	93
Net Imports	0	0	0	0	0	0
SCRs	428	385	428	428	428	428
UDRs	299	299	299	299	299	299
Other Resources	0	0	54	52	239	232
TDI	0	0	0	0	0	0
Total	10,247	9,459	10,618	8,733	15,412	8,959

K Summer Capacity	20	)22	2	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	5,148	4,636	4,037	3,681	4,037	3,681	
Hydro	0	0	0	0	0	0	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	506	147	2,531	121	
Utility-Scale Solar	56	26	56	11	56	2	
Storage (2h)	589	257	812	307	1,378	409	
Storage (4h)	2	1	4	3	223	132	
Net Imports	0	0	0	0	0	0	
SCRs	43	39	43	43	43	43	
UDRs	743	743	743	743	743	743	
Other Resources	121	115	157	150	326	314	
TDI	0	0	0	0	0	0	
Total	6,703	5,818	6,357	5,085	9,336	5,445	

### Demand Inputs Sensitivity: CPNY Transmission Addition

UCAP Reference Point Price (\$/kW-mo)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	\$9.43	\$8.87	\$8.72	\$9.43	\$8.87	\$8.72
G-J Locality	\$15.12	\$14.84	\$14.08	\$15.12	\$14.84	\$14.07
NYC (J)	\$23.25	\$21.58	\$20.30	\$23.25	\$21.58	\$20.28
LI (K)	\$18.53	\$14.33	\$12.99	\$18.53	\$14.33	\$12.99

UCAP/ICAP Translation Factors (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	12.4%	24.4%	53.2%	11.3%	24.8%	52.8%	
G-J Locality	8.0%	15.6%	38.1%	7.8%	14.9%	36.5%	
NYC (J)	7.8%	19.1%	43.9%	7.7%	18.0%	41.9%	
LI (K)	14.9%	22.8%	45.5%	15.0%	22.2%	44.1%	

UCAP Capacity Requirement (MW)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	34,429	33,284	34,666	34,835	33,122	34,988	
G-J Locality	12,816	11,689	11,264	12,835	11,792	11,575	
NYC (J)	8,397	8,051	7,113	8,405	8,151	7,417	
LI (K)	5,237	5,094	5,546	5,229	5,138	5,691	

UCAP Reserve Margin (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	107.9%	104.9%	97.9%	109.1%	104.4%	98.8%	
G-J Locality	85.7%	79.2%	69.2%	85.9%	79.9%	71.1%	
NYC (J)	77.8%	75.8%	60.9%	77.9%	76.7%	63.5%	
LI (K)	96.9%	93.9%	88.1%	96.7%	94.7%	90.4%	

IRM/LCR (%)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	123.1%	138.9%	209.2%	123.1%	138.9%	209.2%
G-J Locality	93.2%	93.9%	111.7%	93.2%	93.9%	112.0%
NYC (J)	84.4%	93.6%	108.7%	84.4%	93.6%	109.3%
LI (K)	113.8%	121.7%	161.6%	113.8%	121.7%	161.6%

#### Outputs Sensitivity: CPNY Transmission Addition

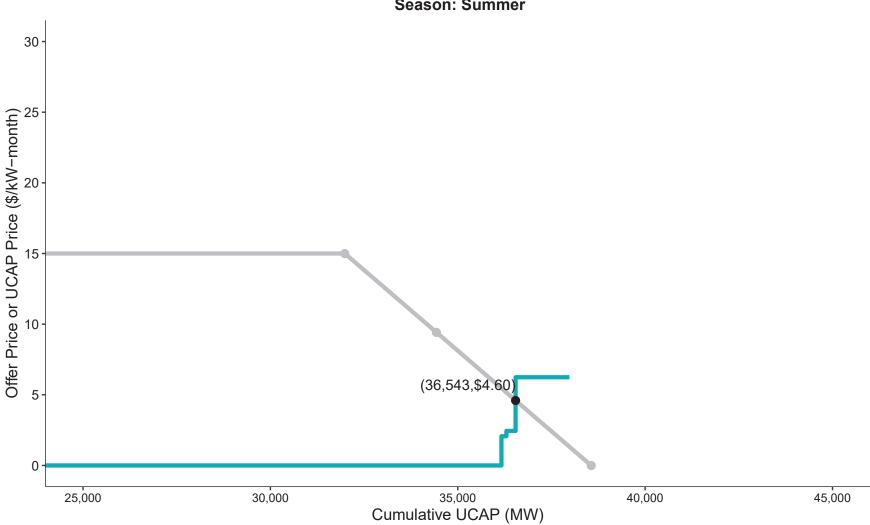
Clearing Prices		Summer		Winter			
(\$/kW-mo)	2022	2026	2032	2022	2026	2032	
NYCA	\$4.60	\$5.07	\$7.81	\$3.33	\$4.23	\$6.40	
G-J Locality	\$7.46	\$9.02	\$9.58	\$3.87	\$5.81	\$7.09	
NYC (J)	\$7.46	\$12.83	\$9.58	\$3.87	\$7.51	\$7.36	
LI (K)	\$7.13	\$14.61	\$14.52	\$3.66	\$12.05	\$13.18	

Clearing UCAP	Summer			Winter		
Quantities (MW)	2022	2026	2032	2022	2026	2032
NYCA	36,543	34,996	35,102	37,540	35,200	36,103
G-J Locality	13,791	12,376	11,803	14,268	12,868	12,435
NYC (J)	9,459	8,638	7,808	9,667	9,107	8,267
LI (K)	5,817	5,076	5,429	5,985	5,286	5,676

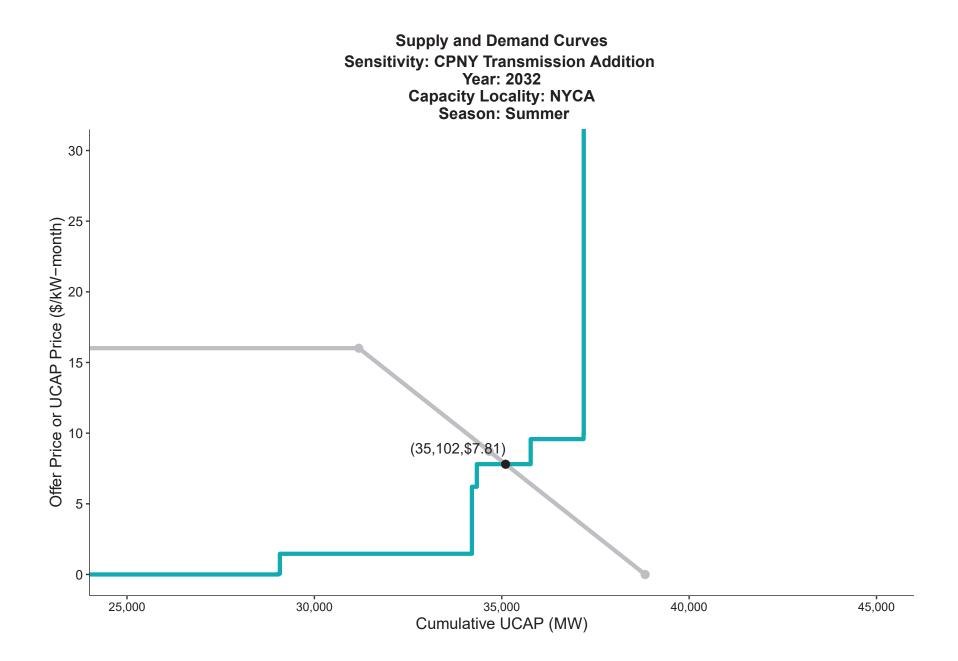
#### Note:

[1] Supply and Demand Curves show "unadjusted" clearing prices. The final clearing price in each capacity locality is the highest price for which capacity segments in that locality are eligible.

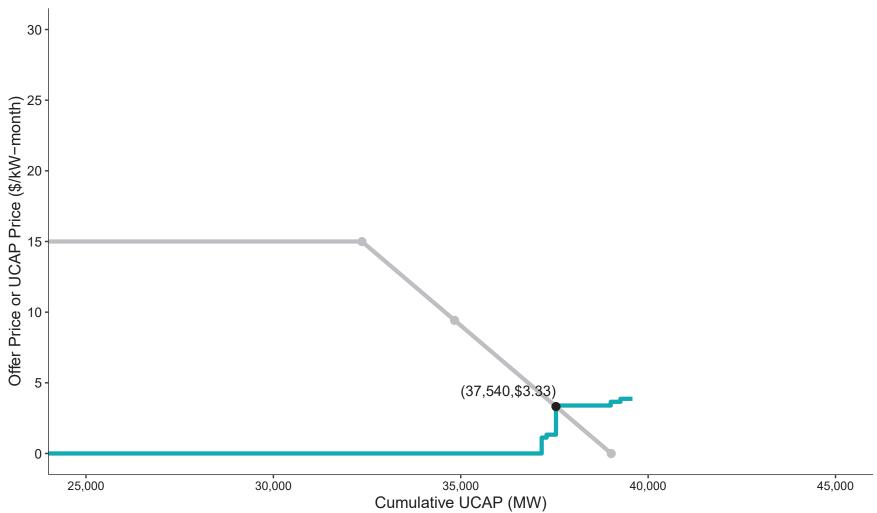
Supply and Demand Curves Sensitivity: CPNY Transmission Addition Year: 2022 Capacity Locality: NYCA Season: Summer



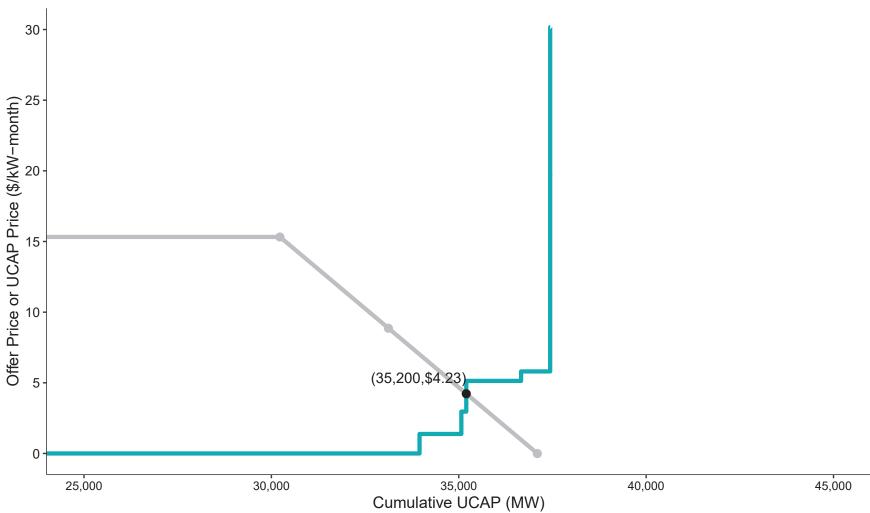
**Supply and Demand Curves** Sensitivity: CPNY Transmission Addition Year: 2026 Capacity Locality: NYCA Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (34,996,\$5.07 5 0 30,000 35,000 Cumulative UCAP (MW) 25,000 40,000 45,000

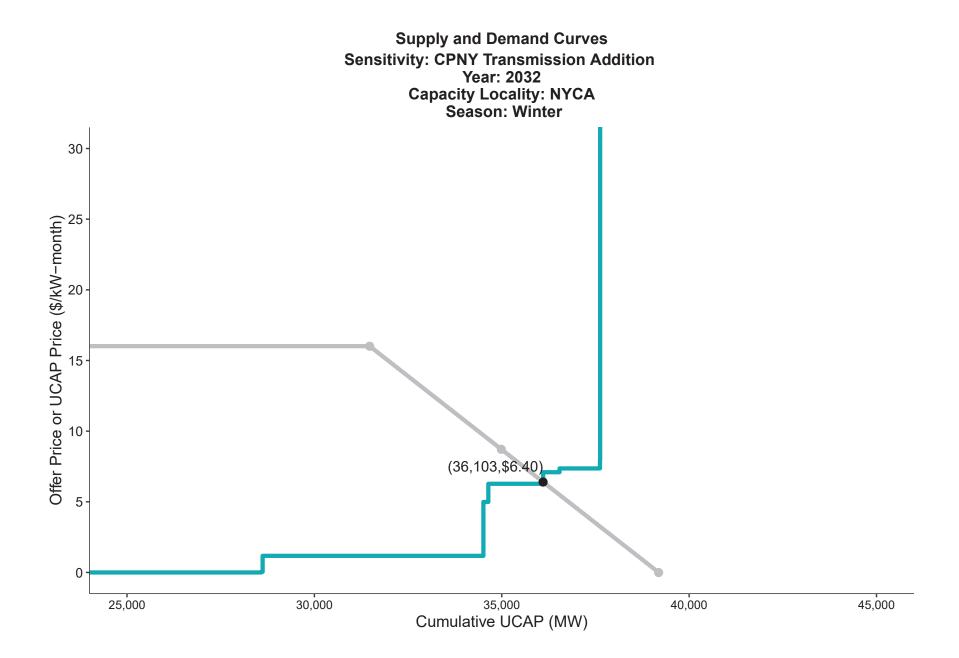


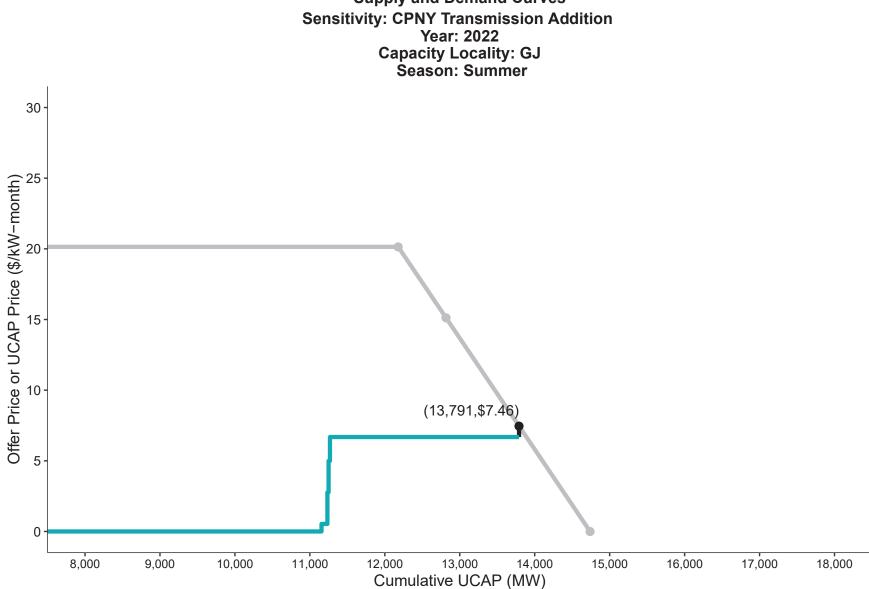
#### Supply and Demand Curves Sensitivity: CPNY Transmission Addition Year: 2022 Capacity Locality: NYCA Season: Winter



Supply and Demand Curves Sensitivity: CPNY Transmission Addition Year: 2026 Capacity Locality: NYCA Season: Winter

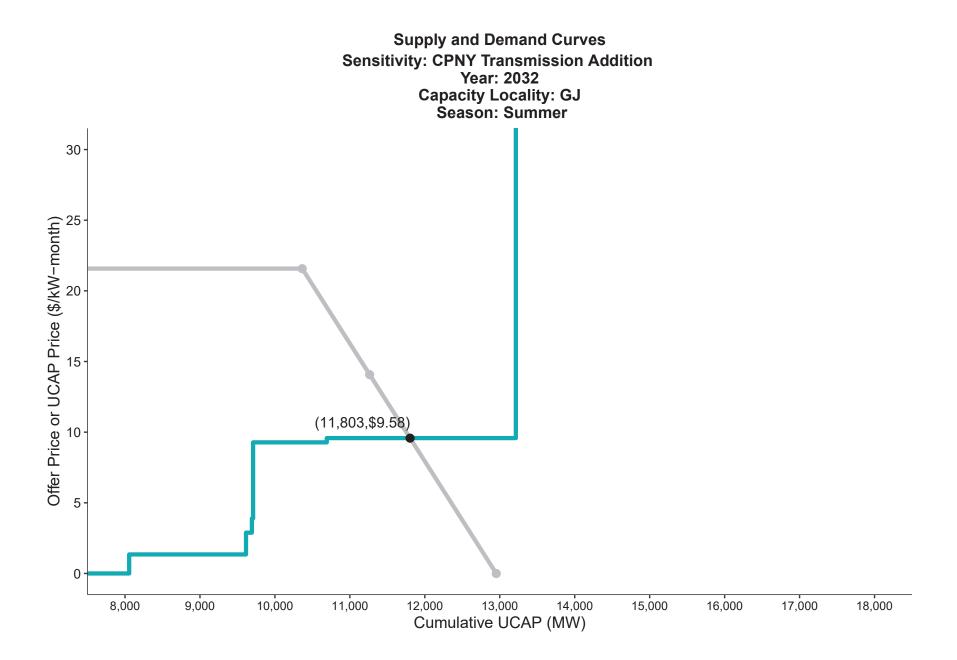


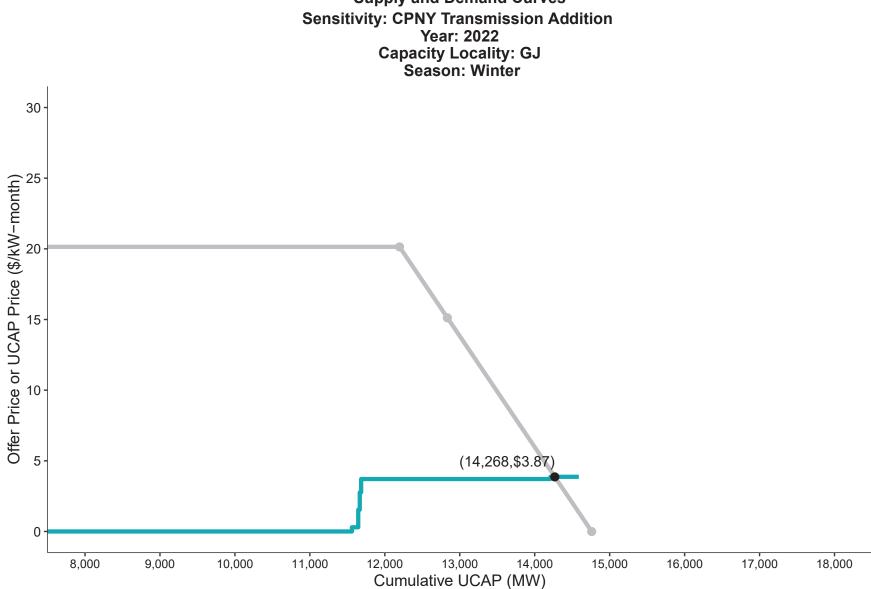


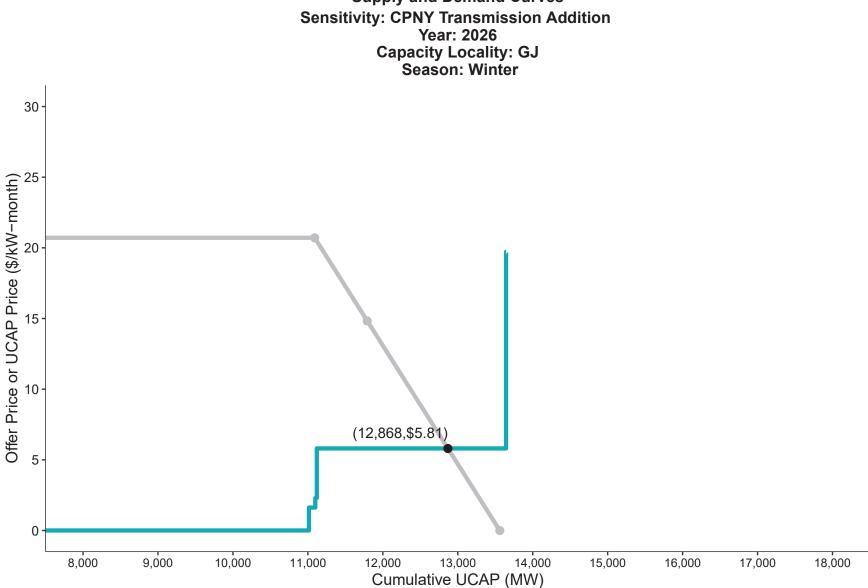


**Supply and Demand Curves** 

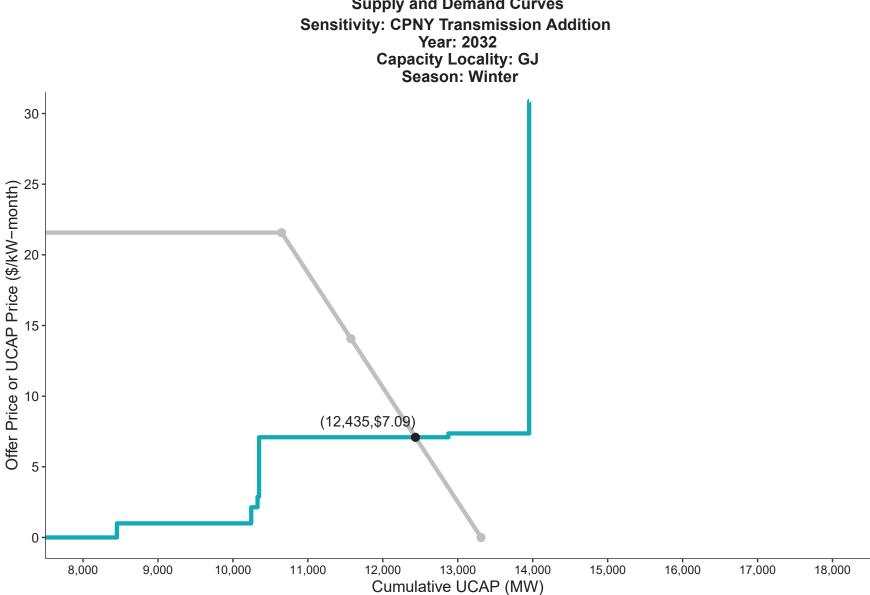
**Supply and Demand Curves** Sensitivity: CPNY Transmission Addition Year: 2026 Capacity Locality: GJ Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (12,376,\$9.02) 5 0 9,000 10,000 8,000 11,000 12,000 13,000 15,000 17,000 18,000 14,000 16,000 Cumulative UCAP (MW)







**Supply and Demand Curves** 



**Supply and Demand Curves** 

**Supply and Demand Curves** Sensitivity: CPNY Transmission Addition Year: 2022 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
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<sup>2</sup> (9,459,\$6.91) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

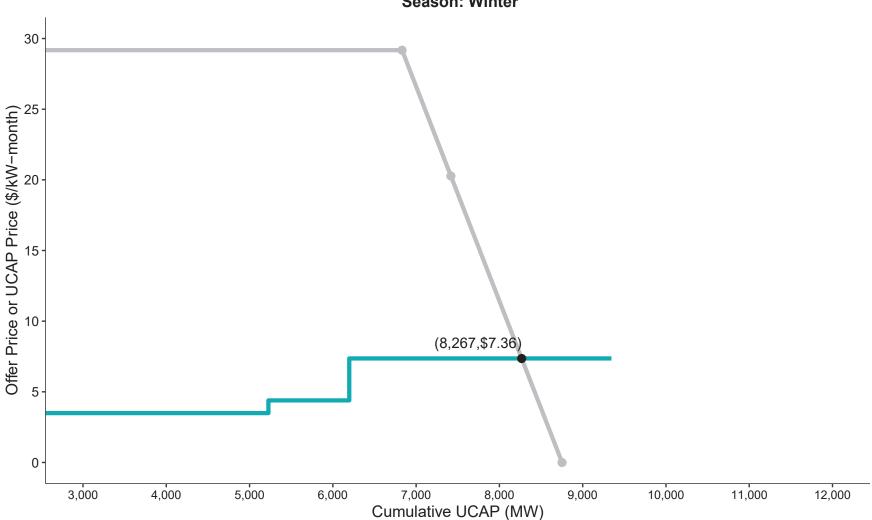
Sensitivity: CPNY Transmission Addition Year: 2026 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (8,638,\$12.83) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

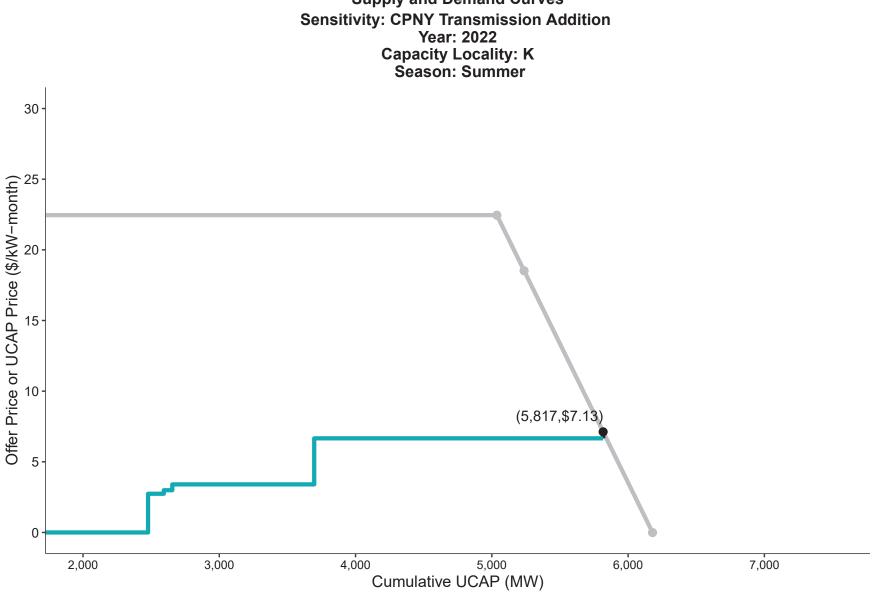
**Supply and Demand Curves** Sensitivity: CPNY Transmission Addition Year: 2032 Capacity Locality: J Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (7,808,\$9.28) 5 0 6,000 8,000 9,000 3,000 4,000 5,000 7,000 10,000 11,000 12,000 Cumulative UCAP (MW)

**Supply and Demand Curves** Sensitivity: CPNY Transmission Addition Year: 2022 Capacity Locality: J Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
<sup>2</sup>
<sup>2</sup>
<sup>2</sup>
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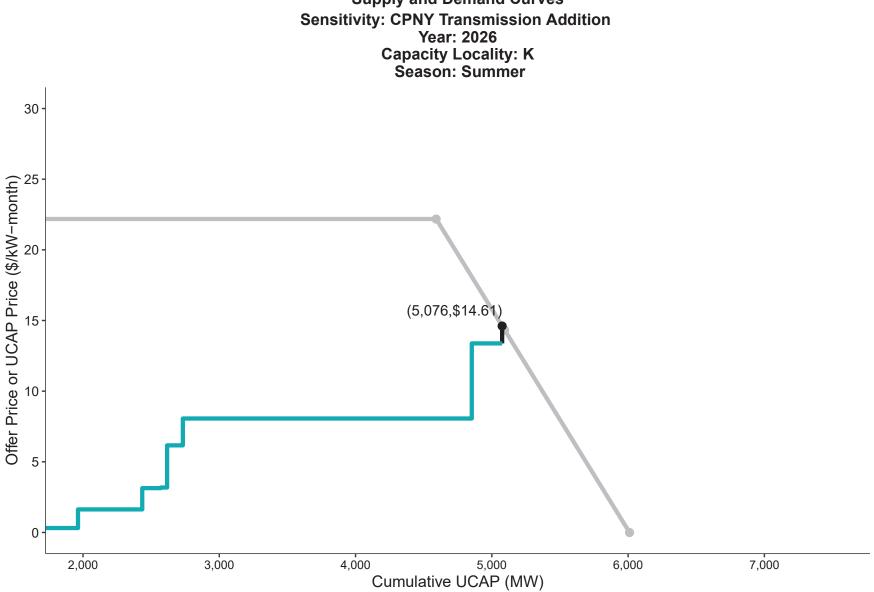
**Supply and Demand Curves** Sensitivity: CPNY Transmission Addition Year: 2026 Capacity Locality: J Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup>
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<sup>2</sup>
<sup>2</sup> (9,107,\$7.51) 5 0 5,000 6,000 9,000 10,000 3,000 4,000 7,000 8,000 11,000 12,000 Cumulative UCAP (MW)

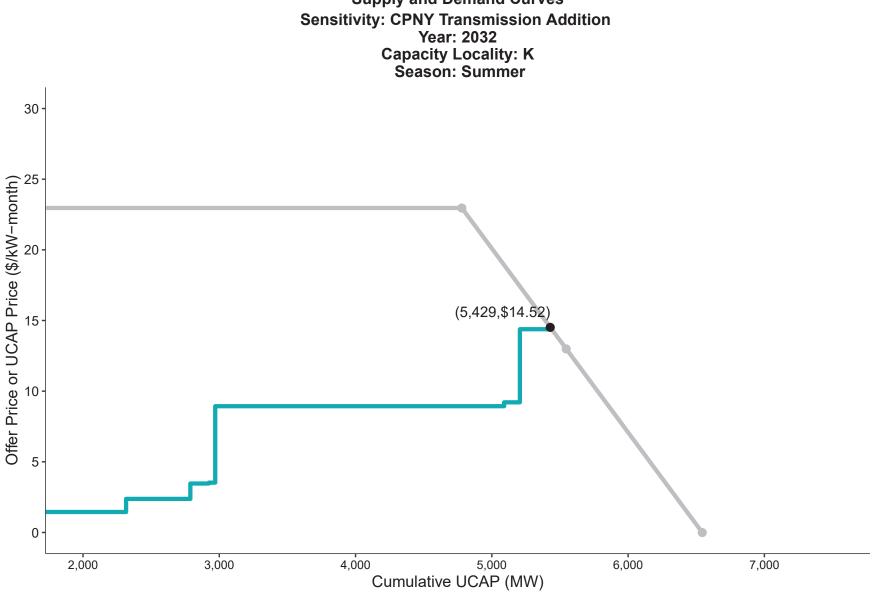
Supply and Demand Curves Sensitivity: CPNY Transmission Addition Year: 2032 Capacity Locality: J Season: Winter

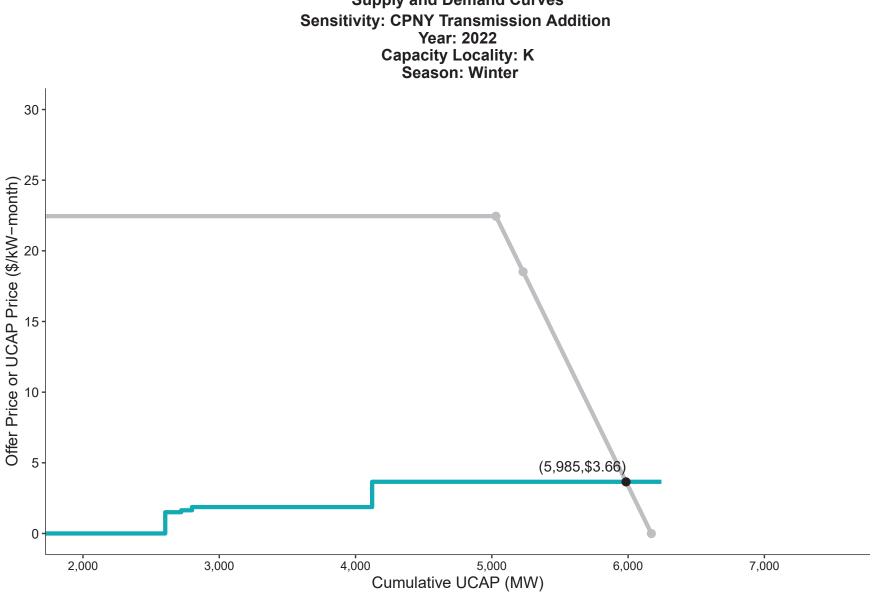


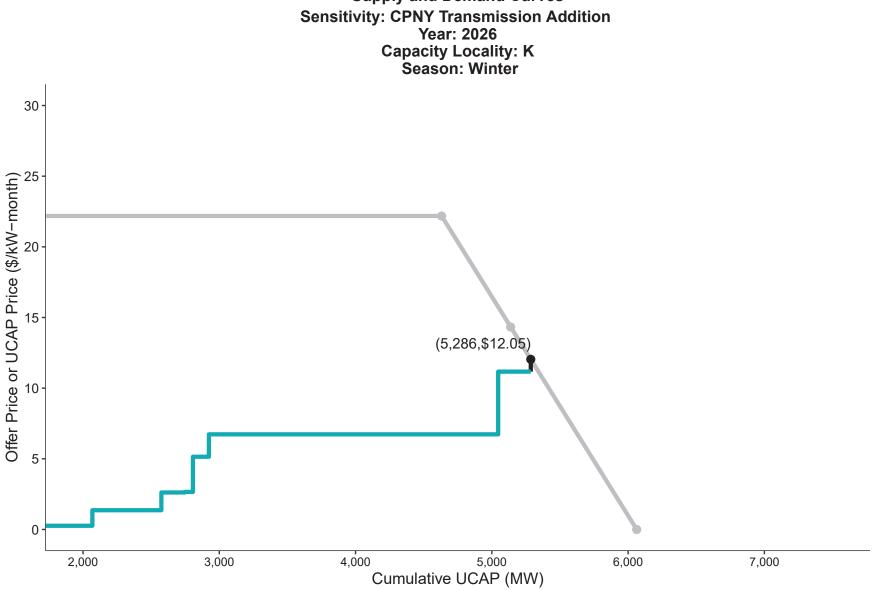


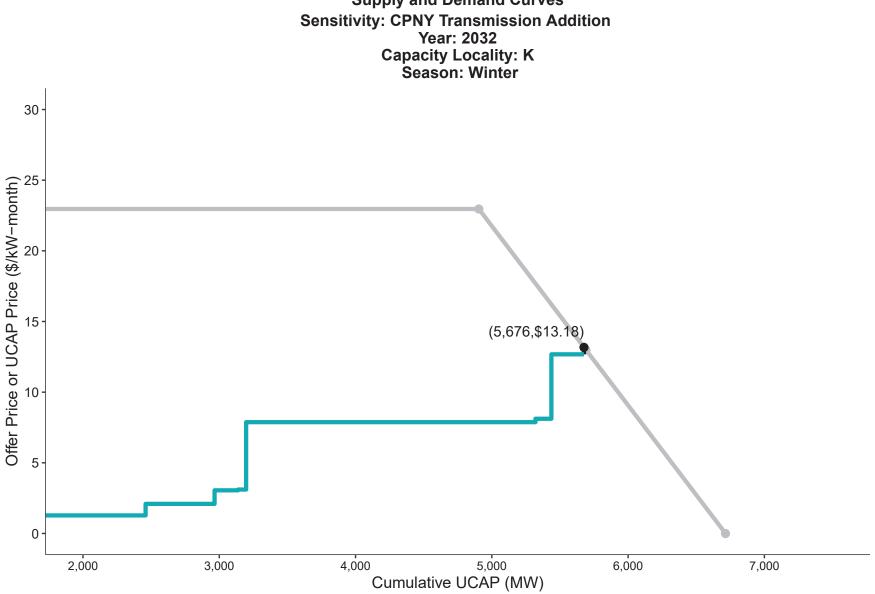
**Supply and Demand Curves** 











### Supply Inputs Sensitivity: TDI and CPNY Transmission Additions

NYCA Summer Capacity	20	22	20	)26	20	)32
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	26,315	24,322	23,481	21,833	23,485	21,836
Hydro	5,018	4,210	5,018	4,210	5,018	4,210
Nuclear	3,345	3,266	3,345	3,266	2,156	2,105
Onshore Wind	1,739	278	1,983	210	9,698	633
Offshore Wind	0	0	1,200	349	7,591	362
Utility-Scale Solar	56	26	5,056	942	16,669	702
Storage (2h)	592	258	2,156	816	4,264	1,266
Storage (4h)	2	2	9	7	386	229
Net Imports	973	973	973	973	973	973
SCRs	1,185	1,067	1,185	1,185	1,185	1,185
UDRs	1,042	1,042	1,042	1,042	1,042	1,042
Other Resources	2,671	2,541	2,571	2,450	3,251	3,109
TDI	0	0	1,250	1,188	1,250	1,188
Total	42,939	37,985	49,271	38,471	76,969	38,840

G-J Summer Capacity	2	022	2	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	14,029	12,951	12,306	11,417	12,306	11,417	
Hydro	101	52	101	52	101	52	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	694	202	5,060	241	
Utility-Scale Solar	0	0	0	0	944	40	
Storage (2h)	1	1	1,343	509	1,436	426	
Storage (4h)	0	0	4	3	158	94	
Net Imports	0	0	0	0	0	0	
SCRs	523	470	523	523	523	523	
UDRs	299	299	299	299	299	299	
Other Resources	19	18	75	72	339	328	
TDI	0	0	1,250	1,188	1,250	1,188	
Total	14,972	13,791	16,595	14,264	22,415	14,607	

### Supply Inputs Sensitivity: TDI and CPNY Transmission Additions

J Summer Capacity	20	)22	20	)26	20	032
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	9,519	8,775	7,796	7,241	7,796	7,240
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	694	202	5,060	241
Utility-Scale Solar	0	0	0	0	0	0
Storage (2h)	1	0	1,342	508	1,433	425
Storage (4h)	0	0	4	3	157	93
Net Imports	0	0	0	0	0	0
SCRs	428	385	428	428	428	428
UDRs	299	299	299	299	299	299
Other Resources	0	0	54	52	239	232
TDI	0	0	1,250	1,188	1,250	1,188
Total	10,247	9,459	11,868	9,921	16,662	10,147

K Summer Capacity	20	)22	2	026	2	032
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	5,148	4,636	4,037	3,681	4,037	3,681
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	506	147	2,531	121
Utility-Scale Solar	56	26	56	11	56	2
Storage (2h)	589	257	812	307	1,378	409
Storage (4h)	2	1	4	3	223	132
Net Imports	0	0	0	0	0	0
SCRs	43	39	43	43	43	43
UDRs	743	743	743	743	743	743
Other Resources	121	115	157	150	326	314
TDI	0	0	0	0	0	0
Total	6,703	5,818	6,357	5,085	9,336	5,445

### Demand Inputs Sensitivity: TDI and CPNY Transmission Additions

UCAP Reference Point Price (\$/kW-mo)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	\$9.43	\$8.87	\$8.72	\$9.43	\$8.87	\$8.72
G-J Locality	\$15.12	\$14.84	\$14.08	\$15.12	\$14.84	\$14.07
NYC (J)	\$23.25	\$21.58	\$20.30	\$23.25	\$21.58	\$20.28
LI (K)	\$18.53	\$14.33	\$12.99	\$18.53	\$14.33	\$12.99

UCAP/ICAP Translation Factors (%)		Summer			Winter		
UCAP/ICAP Translation Factors (76)	2022	2026	2032	2022	2026	2032	
NYCA	12.4%	24.4%	53.2%	11.3%	24.8%	52.8%	
G-J Locality	8.0%	15.6%	38.1%	7.8%	14.9%	36.5%	
NYC (J)	7.8%	19.1%	43.9%	7.7%	18.0%	41.9%	
LI (K)	14.9%	22.8%	45.5%	15.0%	22.2%	44.1%	

LICAR Consoity Requirement (MM)		Summer			Winter		
UCAP Capacity Requirement (MW)	2022	2026	2032	2022	2026	2032	
NYCA	34,429	33,284	34,666	34,835	33,122	34,988	
G-J Locality	12,816	11,689	11,264	12,835	11,792	11,575	
NYC (J)	8,397	8,051	7,113	8,405	8,151	7,417	
LI (K)	5,237	5,094	5,546	5,229	5,138	5,691	

UCAP Reserve Margin (%)		Summer			Winter		
UCAP Reserve Margin (76)	2022	2026	2032	2022	2026	2032	
NYCA	107.9%	104.9%	97.9%	109.1%	104.4%	98.8%	
G-J Locality	85.7%	79.2%	69.2%	85.9%	79.9%	71.1%	
NYC (J)	77.8%	75.8%	60.9%	77.9%	76.7%	63.5%	
LI (K)	96.9%	93.9%	88.1%	96.7%	94.7%	90.4%	

IRM/LCR (%)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	123.1%	138.9%	209.2%	123.1%	138.9%	209.2%
G-J Locality	93.2%	93.9%	111.7%	93.2%	93.9%	112.0%
NYC (J)	84.4%	93.6%	108.7%	84.4%	93.6%	109.3%
LI (K)	113.8%	121.7%	161.6%	113.8%	121.7%	161.6%

#### Outputs Sensitivity: TDI and CPNY Transmission Additions

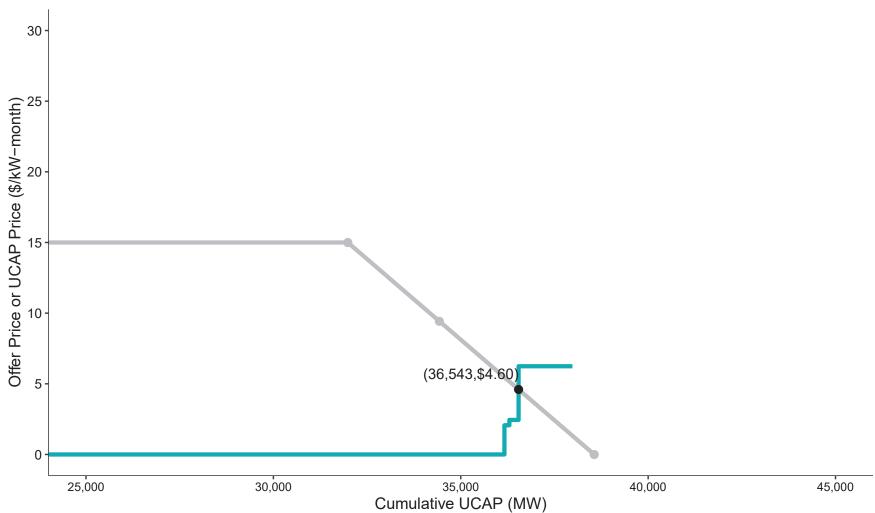
Clearing Prices		Summer		Winter		
(\$/kW-mo)	2022	2026	2032	2022	2026	2032
NYCA	\$4.60	\$5.07	\$7.81	\$3.33	\$4.23	\$6.40
G-J Locality	\$7.46	\$9.02	\$9.28	\$3.87	\$5.81	\$7.09
NYC (J)	\$7.46	\$9.02	\$9.28	\$3.87	\$6.05	\$7.36
LI (K)	\$7.13	\$14.61	\$14.52	\$3.66	\$12.05	\$13.18

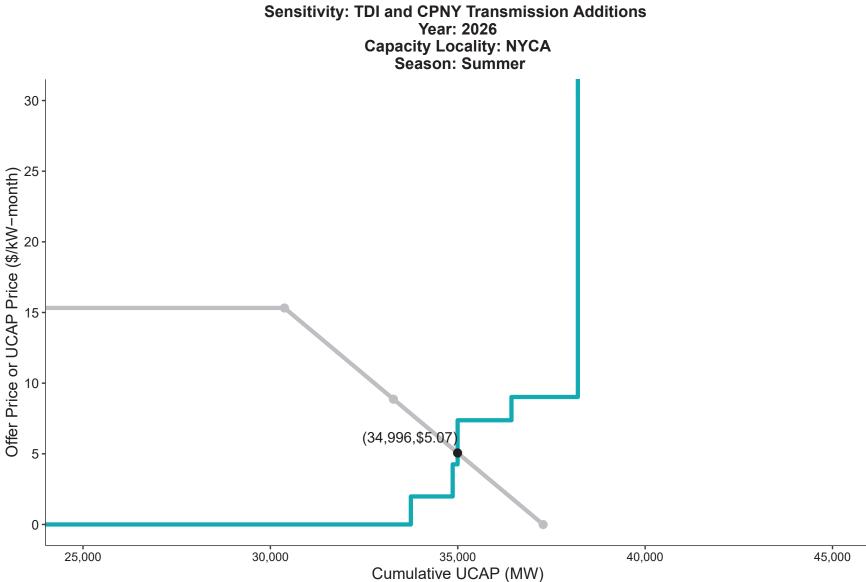
Clearing UCAP	Summer			Winter		
Quantities (MW)	2022	2026	2032	2022	2026	2032
NYCA	36,543	34,996	35,102	37,540	35,200	36,103
G-J Locality	13,791	12,376	11,840	14,268	12,868	12,435
NYC (J)	9,459	8,920	7,808	9,667	9,207	8,267
LI (K)	5,817	5,076	5,429	5,985	5,286	5,676

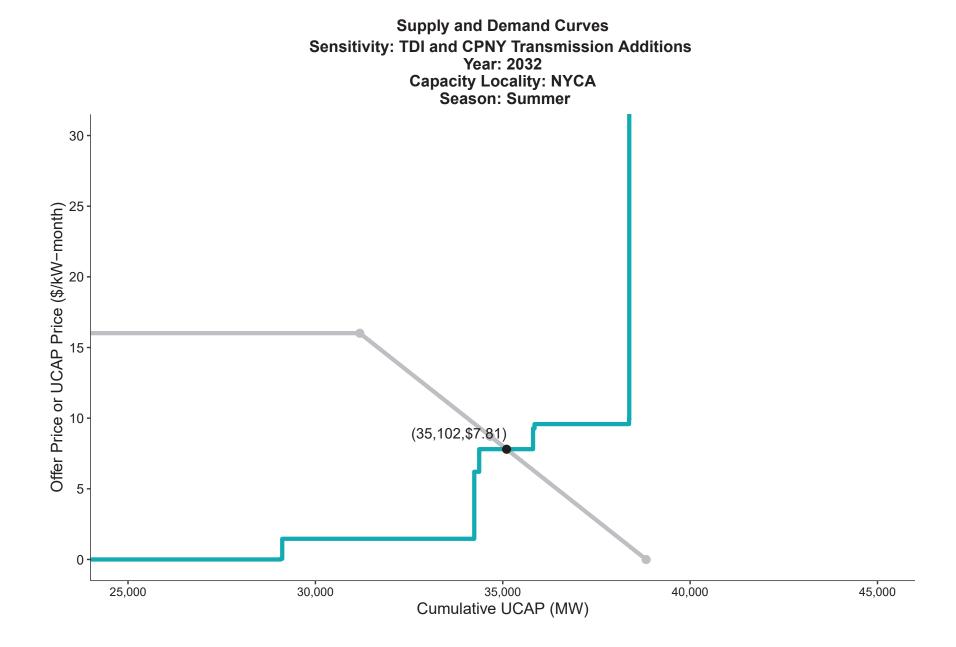
#### Note:

[1] Supply and Demand Curves show "unadjusted" clearing prices. The final clearing price in each capacity locality is the highest price for which capacity segments in that locality are eligible.

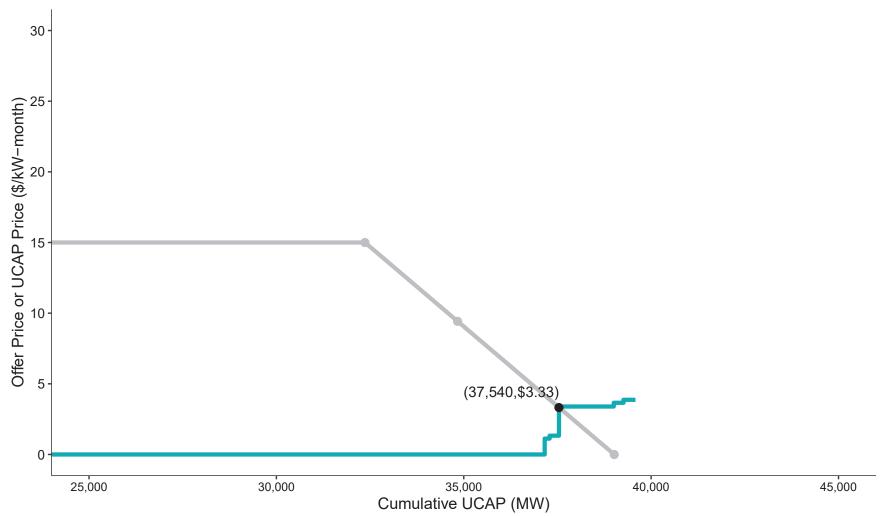
#### Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2022 Capacity Locality: NYCA Season: Summer



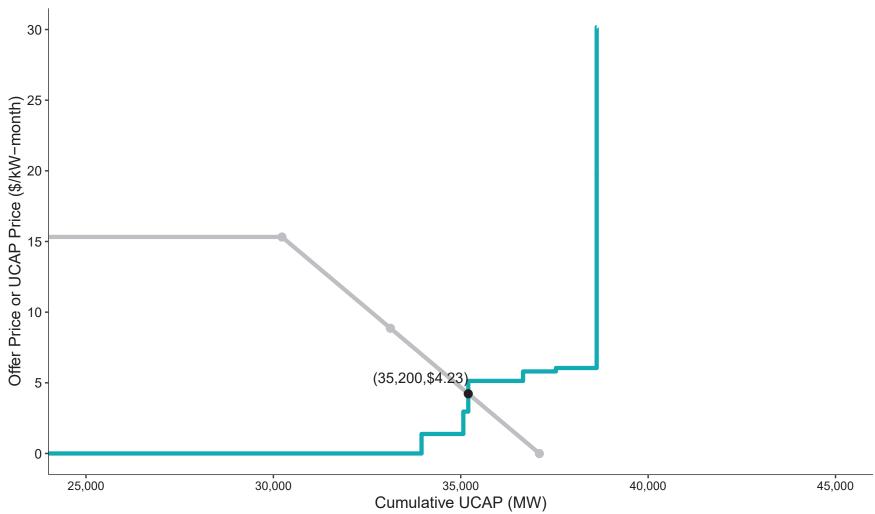


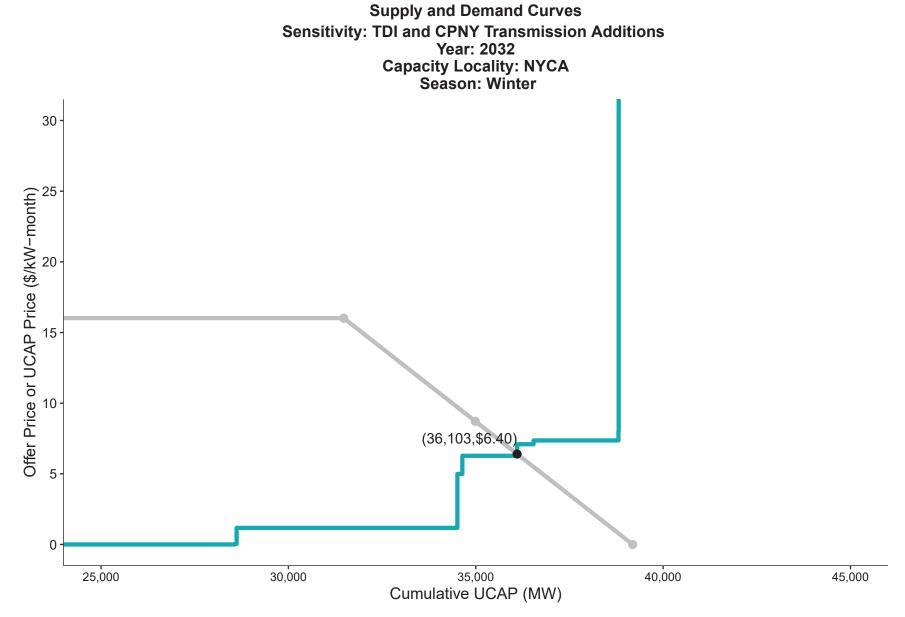


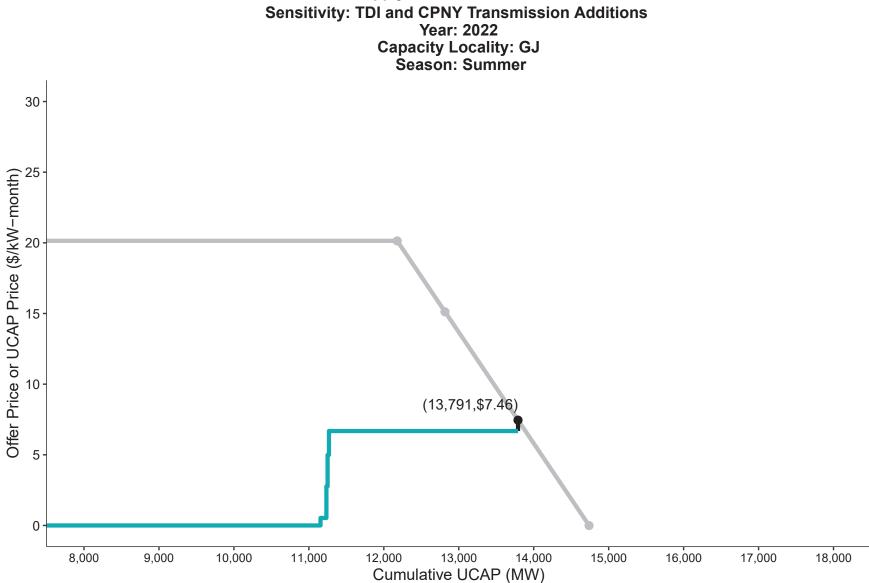
#### Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2022 Capacity Locality: NYCA Season: Winter



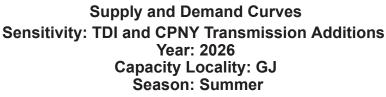
Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2026 Capacity Locality: NYCA Season: Winter

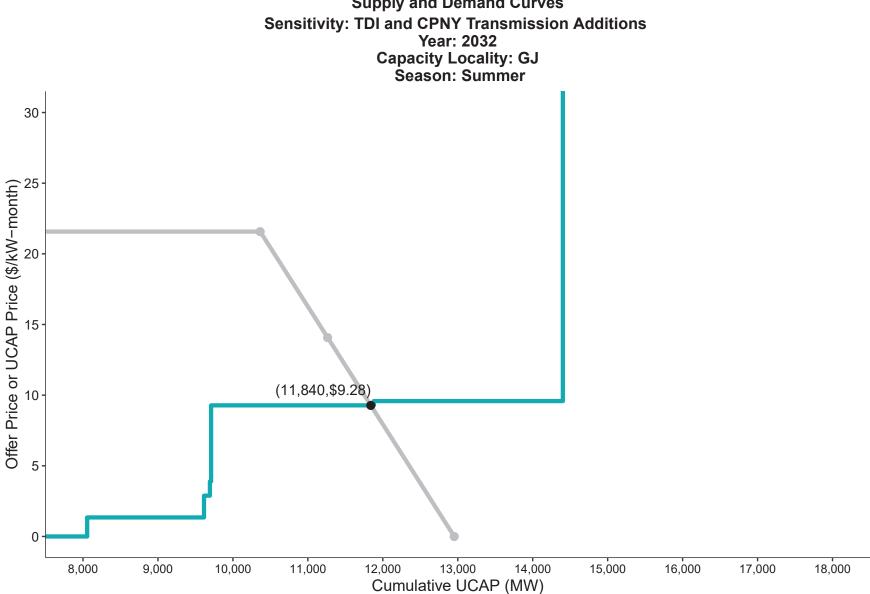




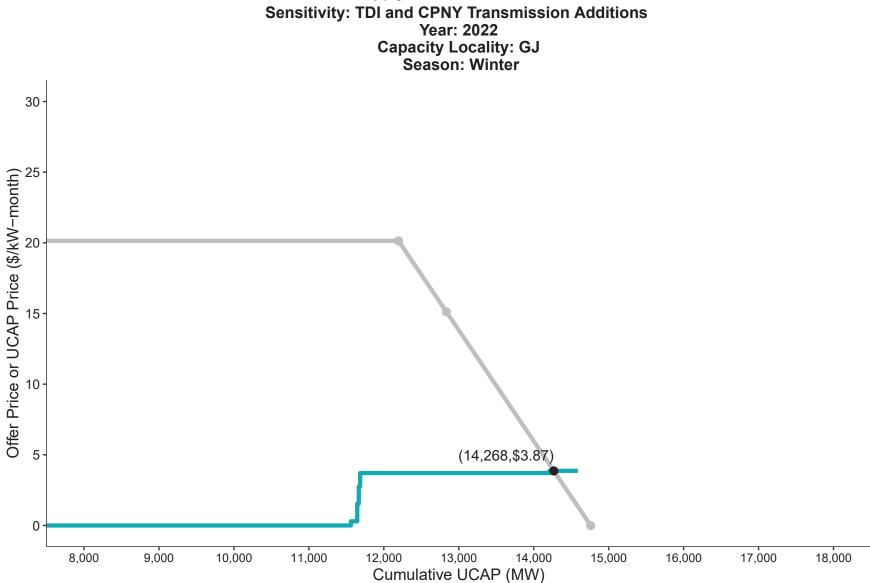


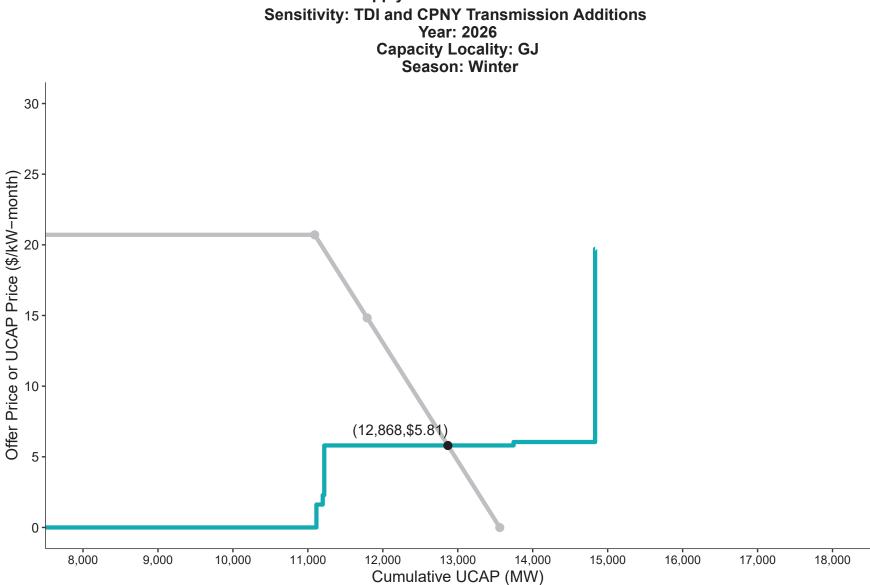
Sensitivity: TDI and CPNY Transmission Additions Year: 2026 Capacity Locality: GJ Season: Summer 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (12,376,\$9.02) 5 0 9,000 10,000 8,000 11,000 12,000 13,000 15,000 17,000 18,000 14,000 16,000 Cumulative UCAP (MW)

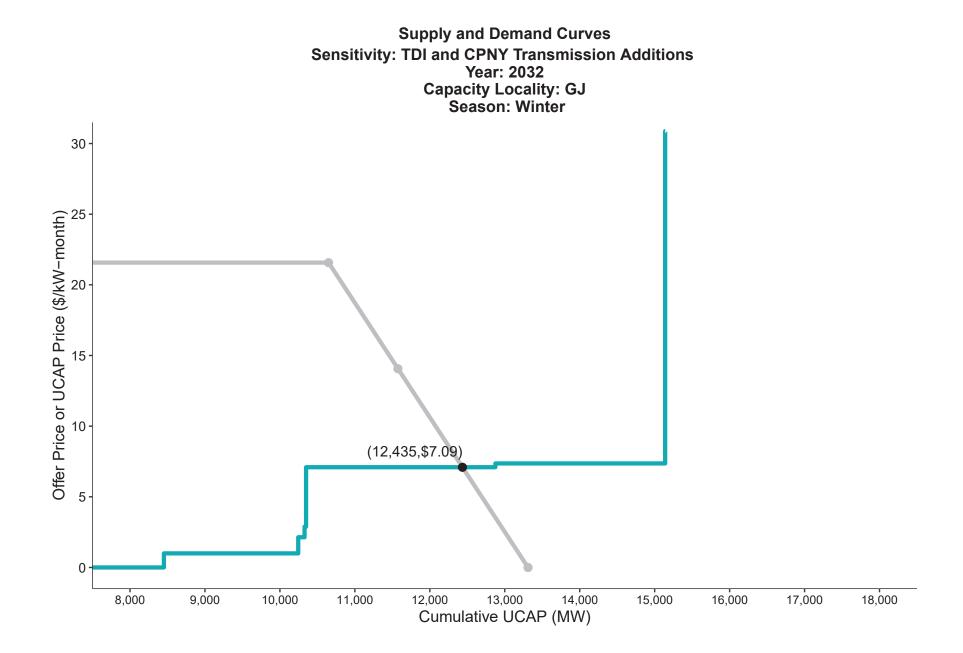




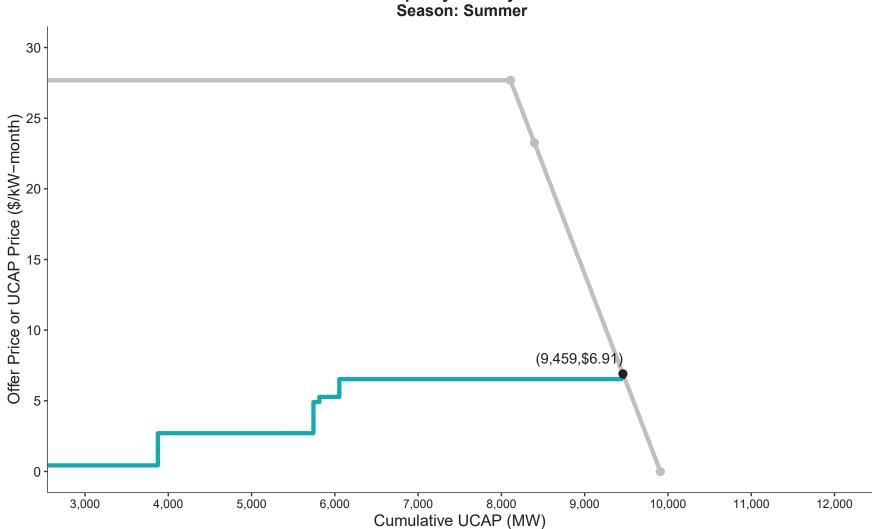
**Supply and Demand Curves** 



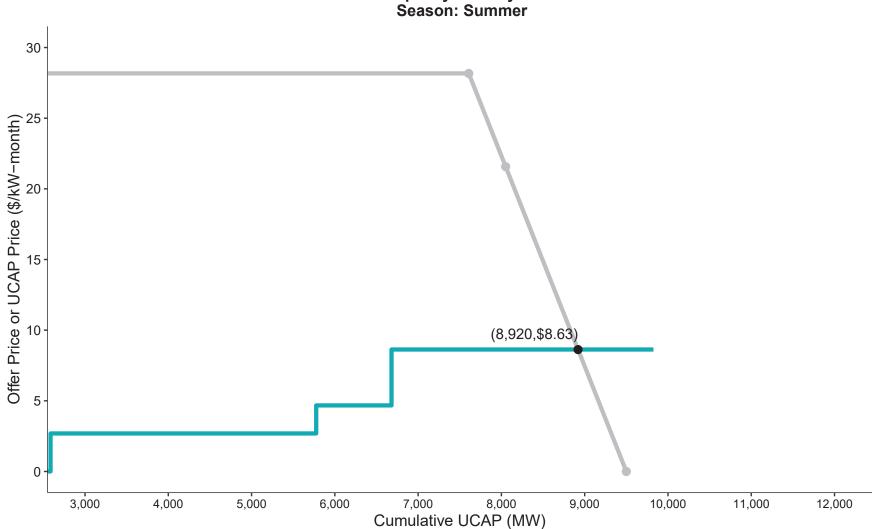




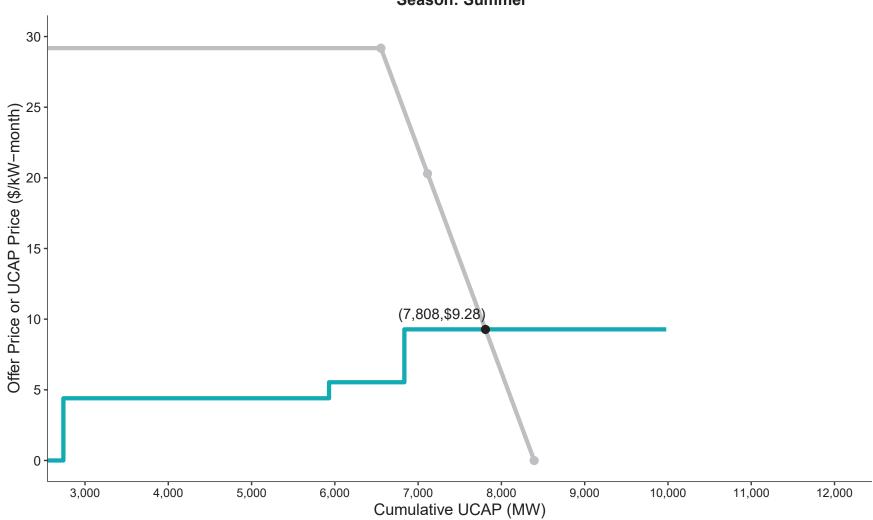
Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2022 Capacity Locality: J Season: Summer



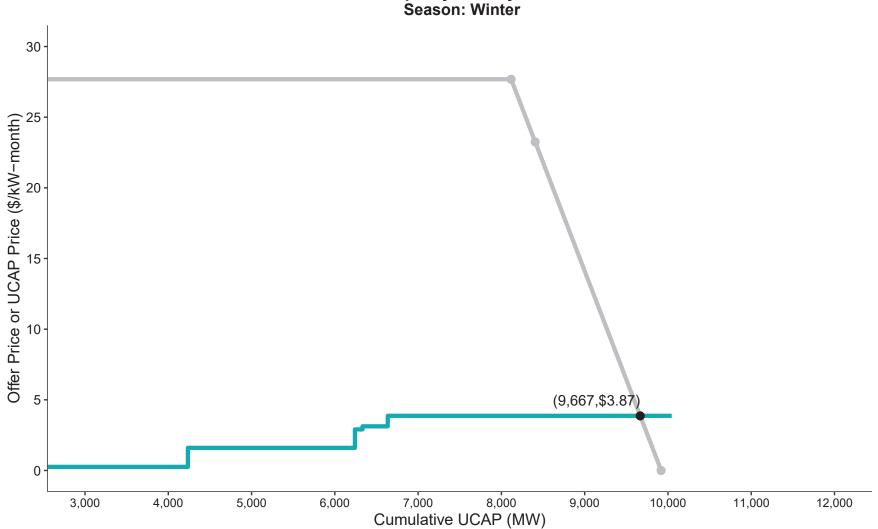
Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2026 Capacity Locality: J Season: Summer



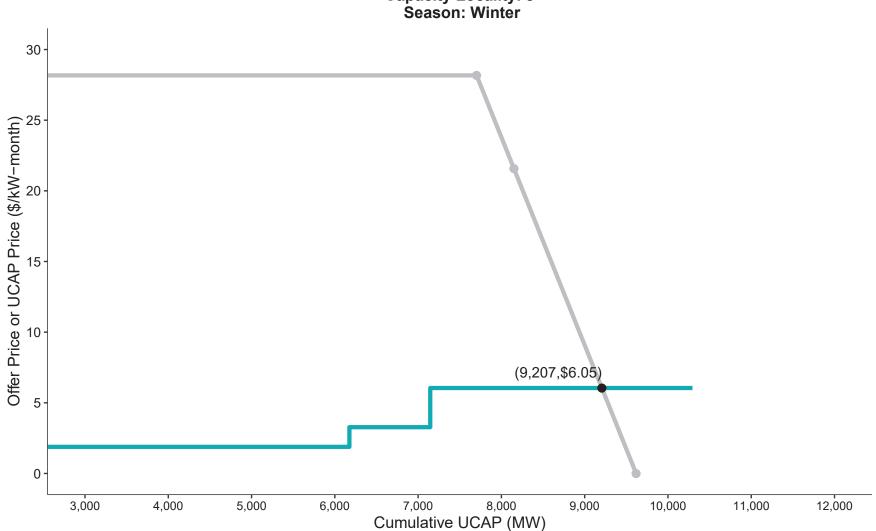
**Supply and Demand Curves** Sensitivity: TDI and CPNY Transmission Additions Year: 2032 Capacity Locality: J Season: Summer



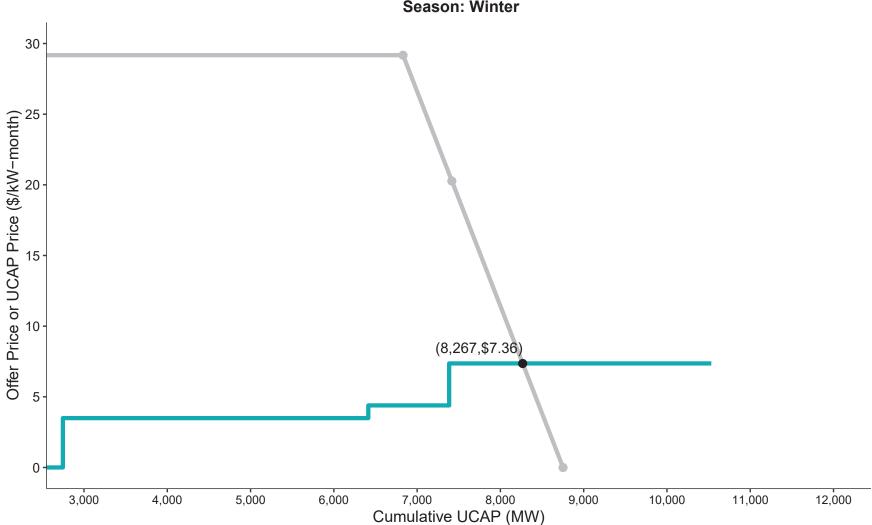
Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2022 Capacity Locality: J Season: Winter

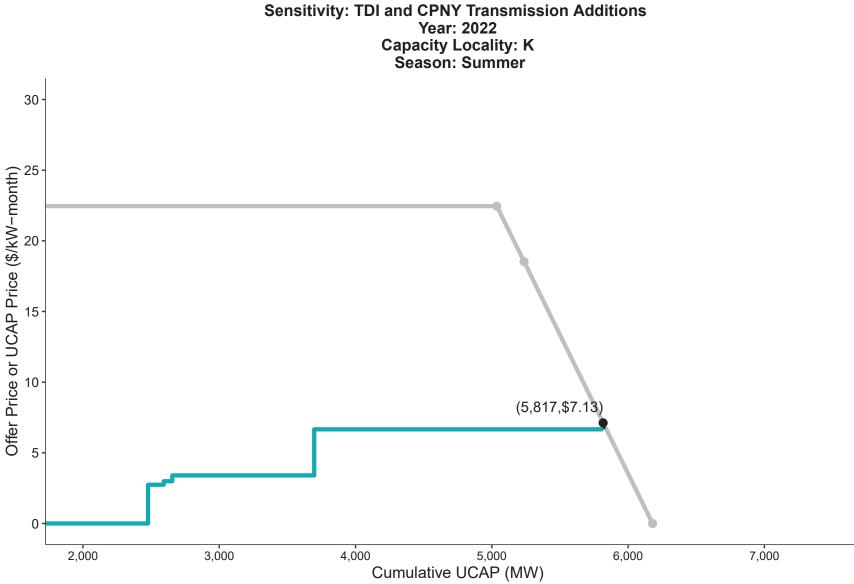


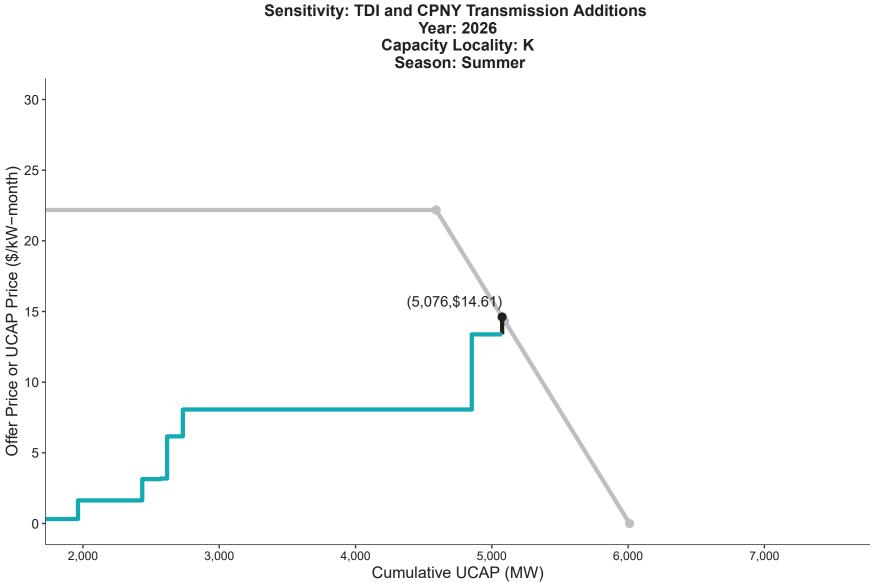
Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2026 Capacity Locality: J Season: Winter

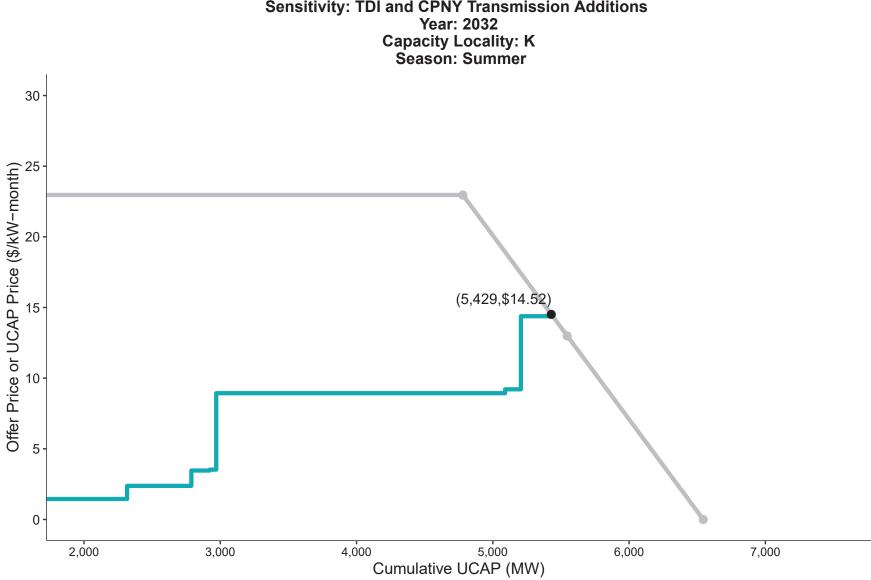


Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2032 Capacity Locality: J Season: Winter

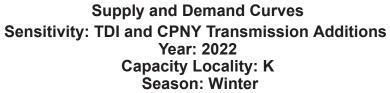


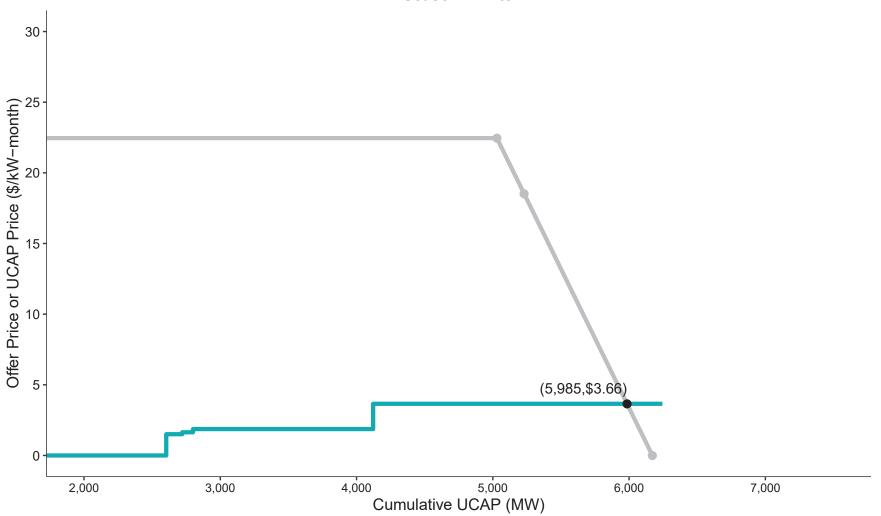




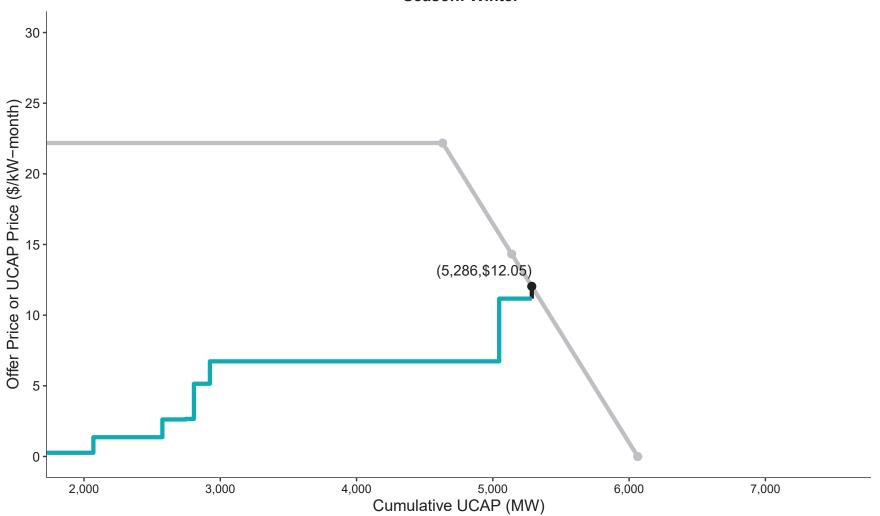


### **Supply and Demand Curves** Sensitivity: TDI and CPNY Transmission Additions





Supply and Demand Curves Sensitivity: TDI and CPNY Transmission Additions Year: 2026 Capacity Locality: K Season: Winter



Sensitivity: TDI and CPNY Transmission Additions Year: 2032 Capacity Locality: K Season: Winter 30 Offer Price or UCAP Price (\$/kW-month) <sup>2</sup> 0 <sup>2</sup> <sup>2</sup> (5,676,\$13.18) 5 0. 3,000 4,000 6,000 7,000 2,000 5,000 Cumulative UCAP (MW)

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#### Supply Inputs Sensitivity: WACC Risk Premium (with TDI and CPNY)

NYCA Summer Capacity	2022		20	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	26,315	24,322	23,481	21,833	23,485	21,836	
Hydro	5,018	4,210	5,018	4,210	5,018	4,210	
Nuclear	3,345	3,266	3,345	3,266	2,156	2,105	
Onshore Wind	1,739	278	1,983	210	9,698	633	
Offshore Wind	0	0	1,200	349	7,591	362	
Utility-Scale Solar	56	26	5,056	942	16,669	702	
Storage (2h)	592	258	2,156	816	4,264	1,266	
Storage (4h)	2	2	9	7	386	229	
Net Imports	973	973	973	973	973	973	
SCRs	1,185	1,067	1,185	1,185	1,185	1,185	
UDRs	1,042	1,042	1,042	1,042	1,042	1,042	
Other Resources	2,671	2,541	2,571	2,450	3,251	3,109	
TDI	0	0	1,250	1,188	1,250	1,188	
Total	42,939	37,985	49,271	38,471	76,969	38,840	

G-J Summer Capacity	2	022	2	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	14,029	12,951	12,306	11,417	12,306	11,417	
Hydro	101	52	101	52	101	52	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	694	202	5,060	241	
Utility-Scale Solar	0	0	0	0	944	40	
Storage (2h)	1	1	1,343	509	1,436	426	
Storage (4h)	0	0	4	3	158	94	
Net Imports	0	0	0	0	0	0	
SCRs	523	470	523	523	523	523	
UDRs	299	299	299	299	299	299	
Other Resources	19	18	75	72	339	328	
TDI	0	0	1,250	1,188	1,250	1,188	
Total	14,972	13,791	16,595	14,264	22,415	14,607	

#### Supply Inputs Sensitivity: WACC Risk Premium (with TDI and CPNY)

J Summer Capacity	20	)22	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	9,519	8,775	7,796	7,241	7,796	7,240
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	694	202	5,060	241
Utility-Scale Solar	0	0	0	0	0	0
Storage (2h)	1	0	1,342	508	1,433	425
Storage (4h)	0	0	4	3	157	93
Net Imports	0	0	0	0	0	0
SCRs	428	385	428	428	428	428
UDRs	299	299	299	299	299	299
Other Resources	0	0	54	52	239	232
TDI	0	0	1,250	1,188	1,250	1,188
Total	10,247	9,459	11,868	9,921	16,662	10,147

K Summer Capacity	20	)22	2	2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	5,148	4,636	4,037	3,681	4,037	3,681	
Hydro	0	0	0	0	0	0	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	506	147	2,531	121	
Utility-Scale Solar	56	26	56	11	56	2	
Storage (2h)	589	257	812	307	1,378	409	
Storage (4h)	2	1	4	3	223	132	
Net Imports	0	0	0	0	0	0	
SCRs	43	39	43	43	43	43	
UDRs	743	743	743	743	743	743	
Other Resources	121	115	157	150	326	314	
TDI	0	0	0	0	0	0	
Total	6,703	5,818	6,357	5,085	9,336	5,445	

#### Demand Inputs Sensitivity: WACC Risk Premium (with TDI and CPNY)

UCAP Reference Point Price (\$/kW-mo)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	\$9.43	\$10.47	\$10.27	\$9.43	\$10.47	\$10.27
G-J Locality	\$15.12	\$17.38	\$16.46	\$15.12	\$17.38	\$16.45
NYC (J)	\$23.25	\$25.04	\$23.55	\$23.25	\$25.04	\$23.52
LI (K)	\$18.53	\$17.15	\$15.49	\$18.53	\$17.15	\$15.49

UCAP/ICAP Translation Factors (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	12.4%	24.4%	53.2%	11.3%	24.8%	52.8%	
G-J Locality	8.0%	15.6%	38.1%	7.8%	14.9%	36.5%	
NYC (J)	7.8%	19.1%	43.9%	7.7%	18.0%	41.9%	
LI (K)	14.9%	22.8%	45.5%	15.0%	22.2%	44.1%	

UCAP Capacity Requirement (MW)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	34,429	33,284	34,666	34,835	33,122	34,988	
G-J Locality	12,816	11,689	11,264	12,835	11,792	11,575	
NYC (J)	8,397	8,051	7,113	8,405	8,151	7,417	
LI (K)	5,237	5,094	5,546	5,229	5,138	5,691	

UCAP Reserve Margin (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	107.9%	104.9%	97.9%	109.1%	104.4%	98.8%	
G-J Locality	85.7%	79.2%	69.2%	85.9%	79.9%	71.1%	
NYC (J)	77.8%	75.8%	60.9%	77.9%	76.7%	63.5%	
LI (K)	96.9%	93.9%	88.1%	96.7%	94.7%	90.4%	

IRM/LCR (%)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	123.1%	138.9%	209.2%	123.1%	138.9%	209.2%
G-J Locality	93.2%	93.9%	111.7%	93.2%	93.9%	112.0%
NYC (J)	84.4%	93.6%	108.7%	84.4%	93.6%	109.3%
LI (K)	113.8%	121.7%	161.6%	113.8%	121.7%	161.6%

#### Outputs Sensitivity: WACC Risk Premium (with TDI and CPNY)

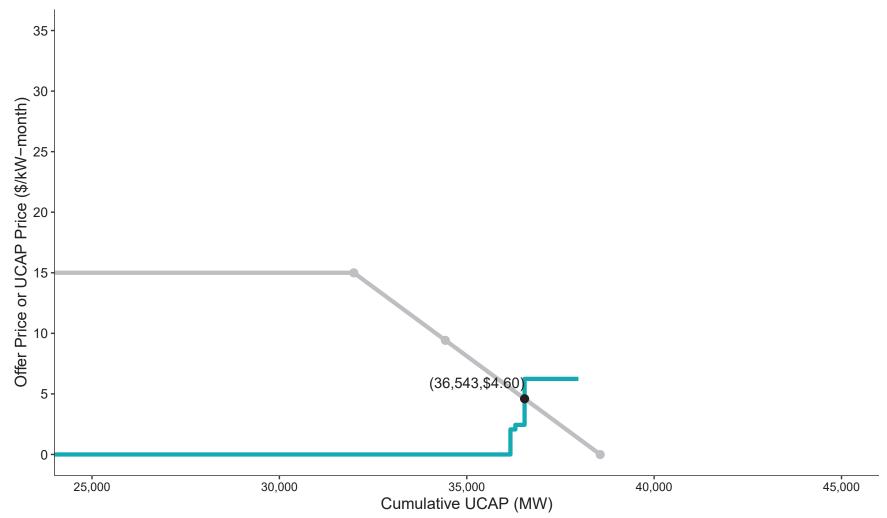
Clearing Prices	Summer			Winter			
(\$/kW-mo)	2022	2026	2032	2022	2026	2032	
NYCA	\$4.60	\$5.57	\$7.81	\$3.33	\$4.73	\$7.09	
G-J Locality	\$7.46	\$9.02	\$9.58	\$3.87	\$5.81	\$7.09	
NYC (J)	\$7.46	\$9.02	\$9.58	\$3.87	\$6.05	\$7.36	
LI (K)	\$7.13	\$17.49	\$17.31	\$3.66	\$14.41	\$15.71	

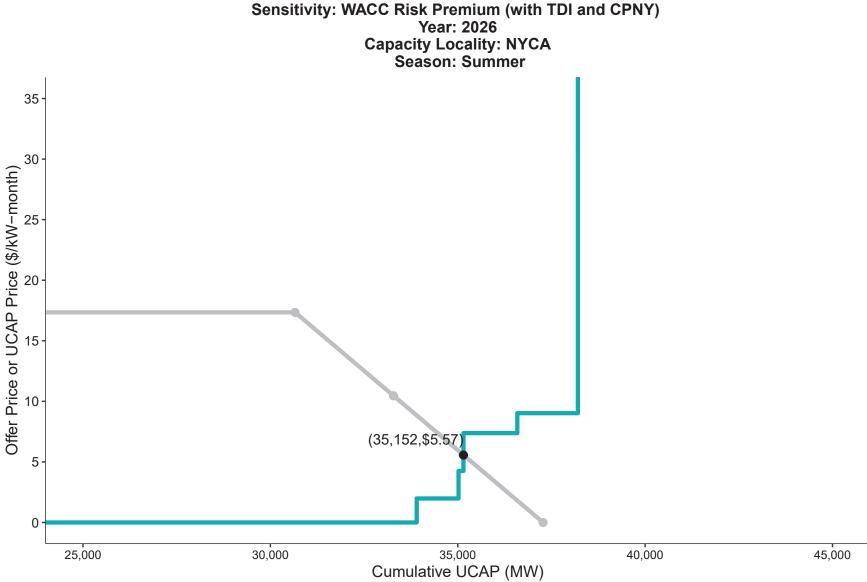
Clearing UCAP	Summer			Winter			
Quantities (MW)	2022	2026	2032	2022	2026	2032	
NYCA	36,543	35,152	35,664	37,540	35,302	36,286	
G-J Locality	13,791	12,532	11,970	14,268	12,970	12,562	
NYC (J)	9,459	9,001	7,889	9,667	9,263	8,334	
LI (K)	5,817	5,076	5,429	5,985	5,286	5,676	

#### Note:

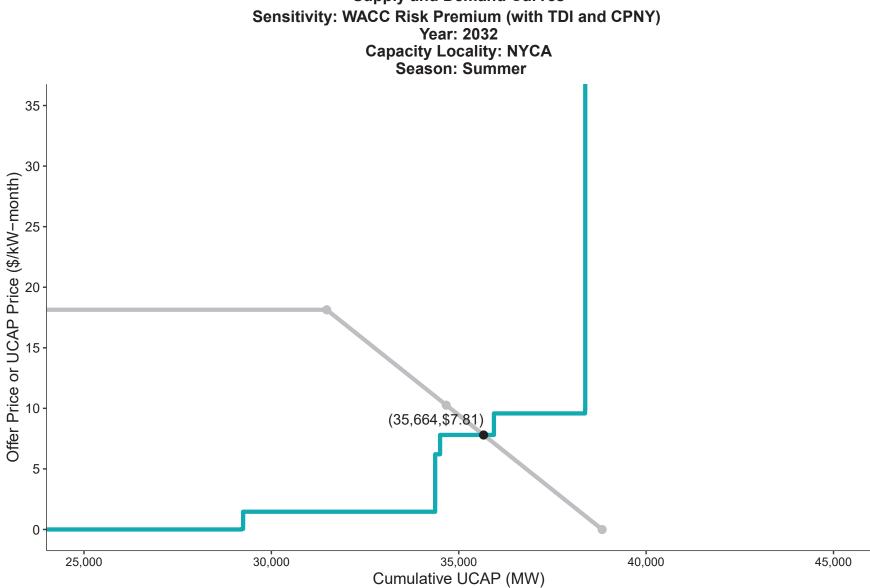
[1] Supply and Demand Curves show "unadjusted" clearing prices. The final clearing price in each capacity locality is the highest price for which capacity segments in that locality are eligible.

#### Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2022 Capacity Locality: NYCA Season: Summer

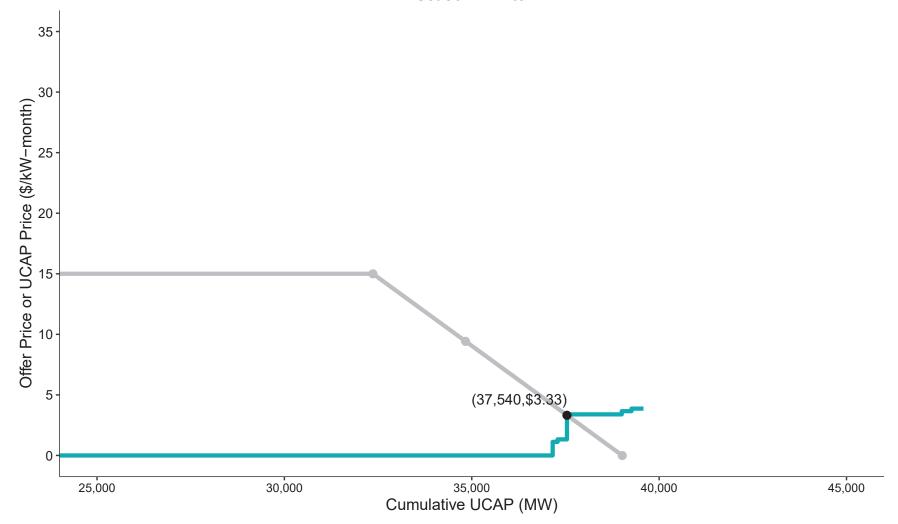




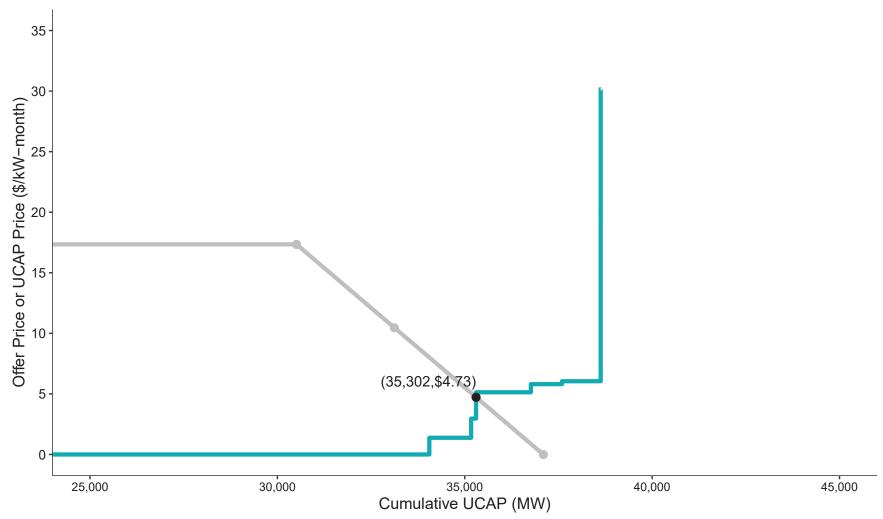
### **Supply and Demand Curves** Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2026



#### Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2022 Capacity Locality: NYCA Season: Winter



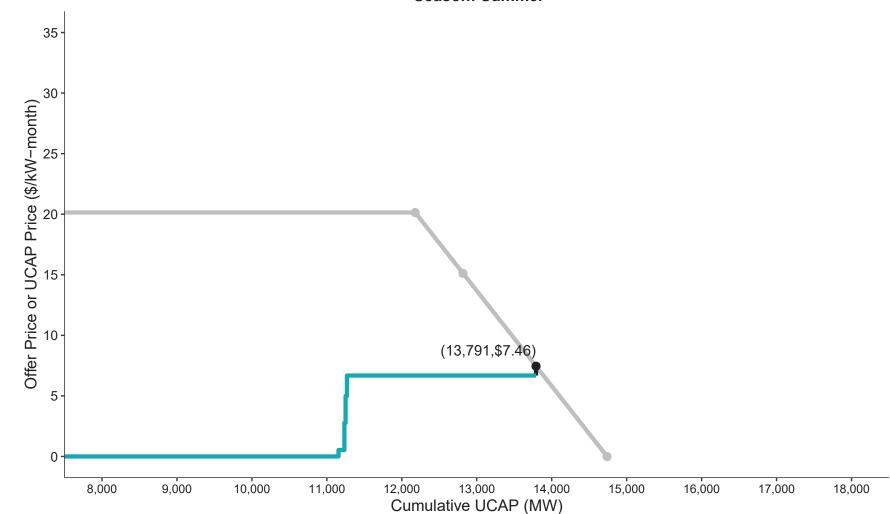
#### Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2026 Capacity Locality: NYCA Season: Winter

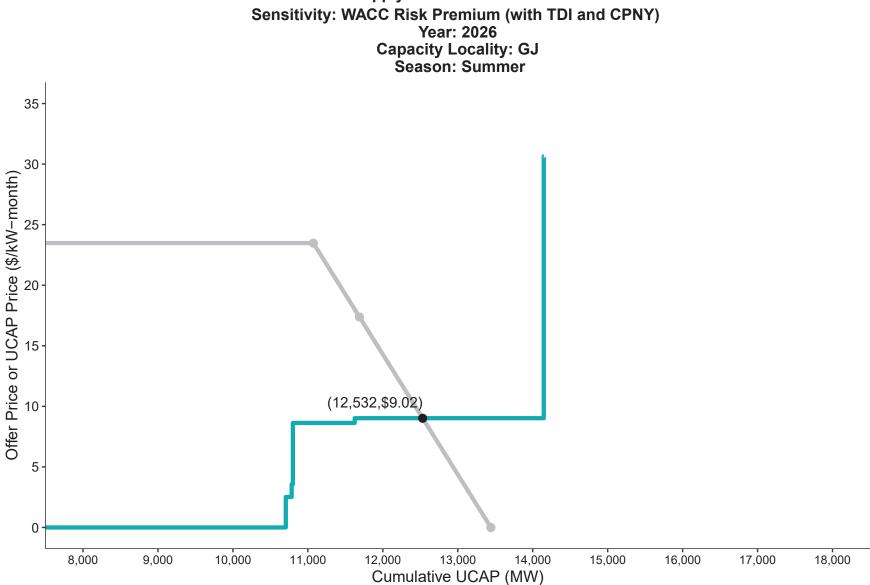


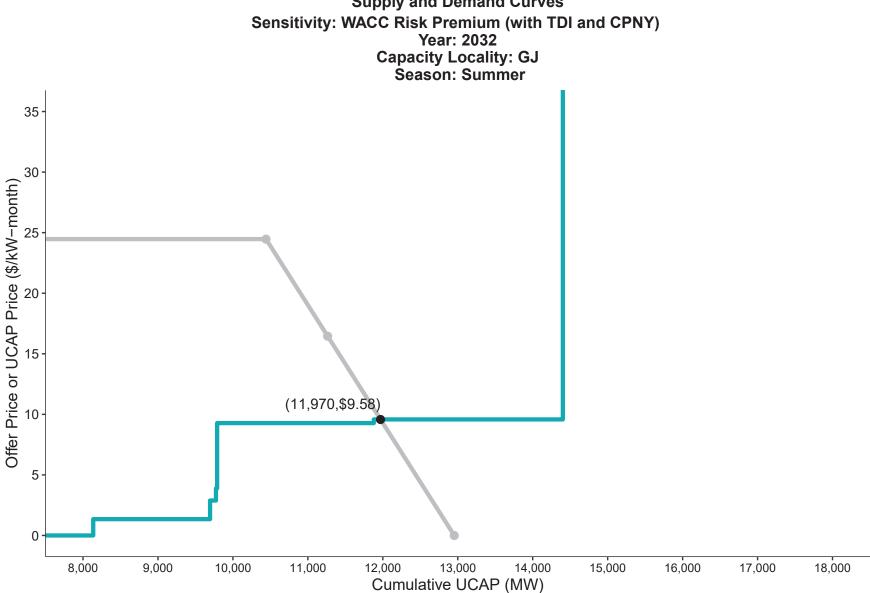
Capacity Locality: NYCA Season: Winter 35 Offer Price or UCAP Price (\$/kW-month) 0 21 05 57 00 01 01 02 (36,286,\$7.09) 5 0 35,000 Cumulative UCAP (MW) 25,000 30,000 40,000 45,000

### **Supply and Demand Curves** Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2032

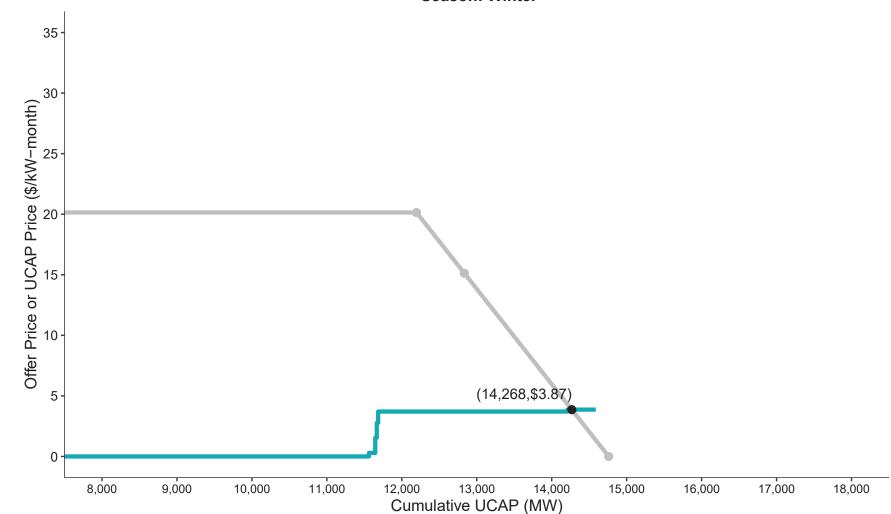
#### Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2022 Capacity Locality: GJ Season: Summer

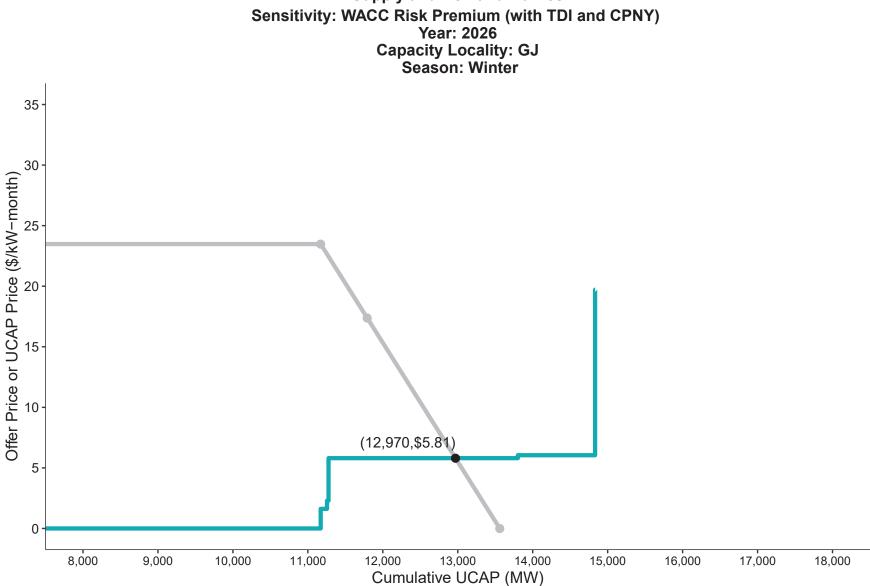


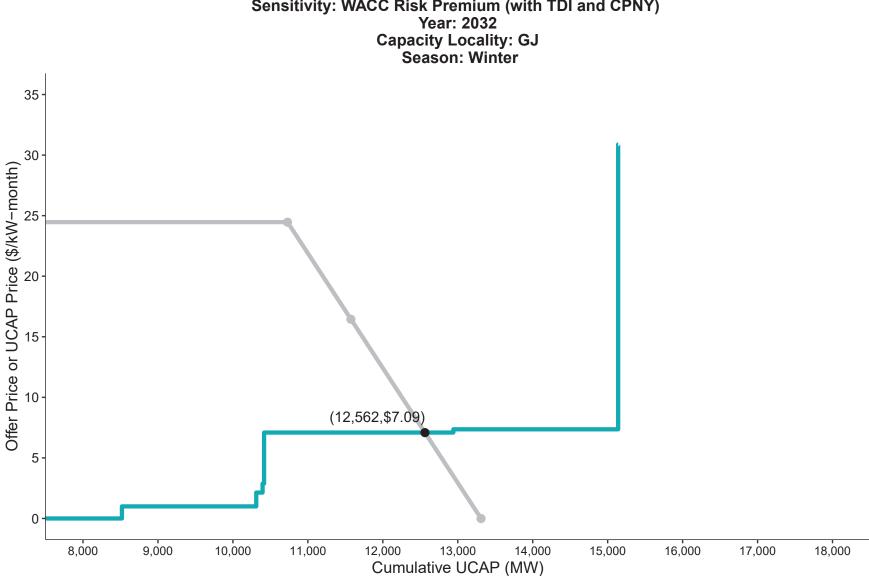




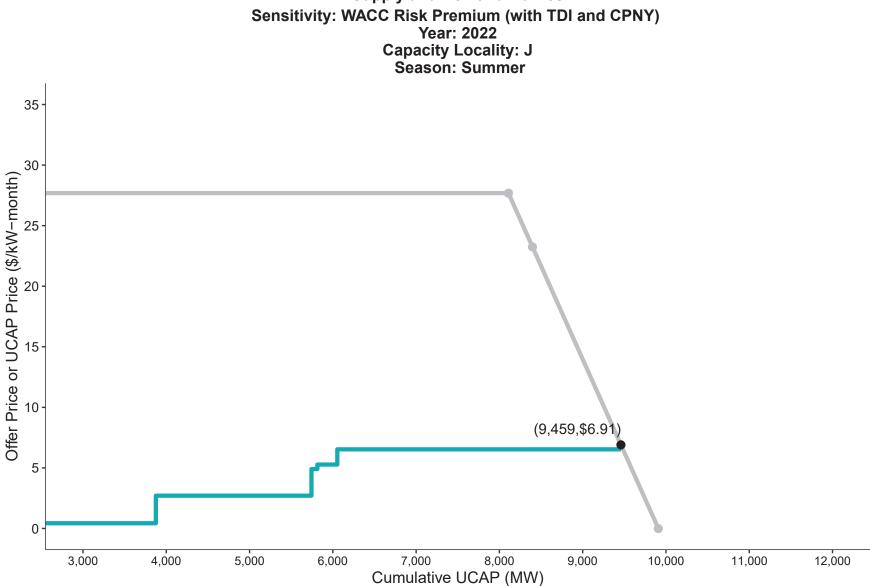
#### Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2022 Capacity Locality: GJ Season: Winter



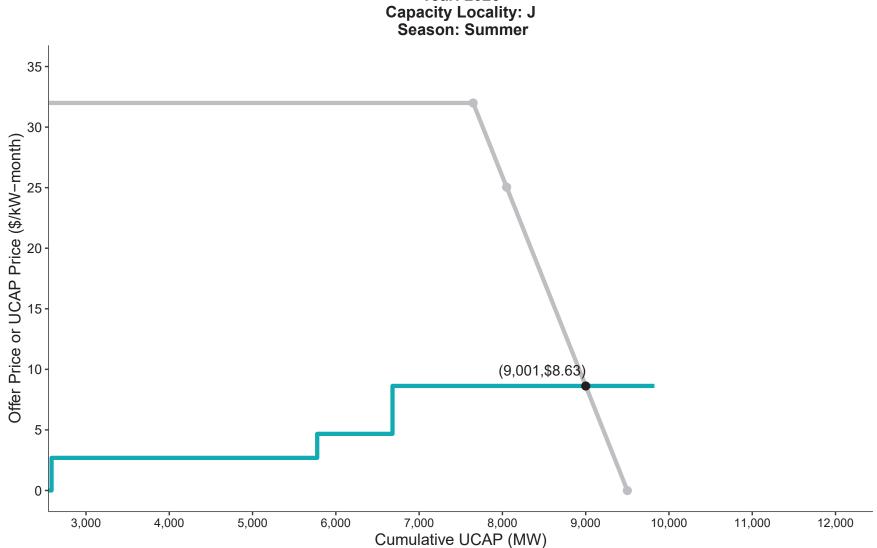




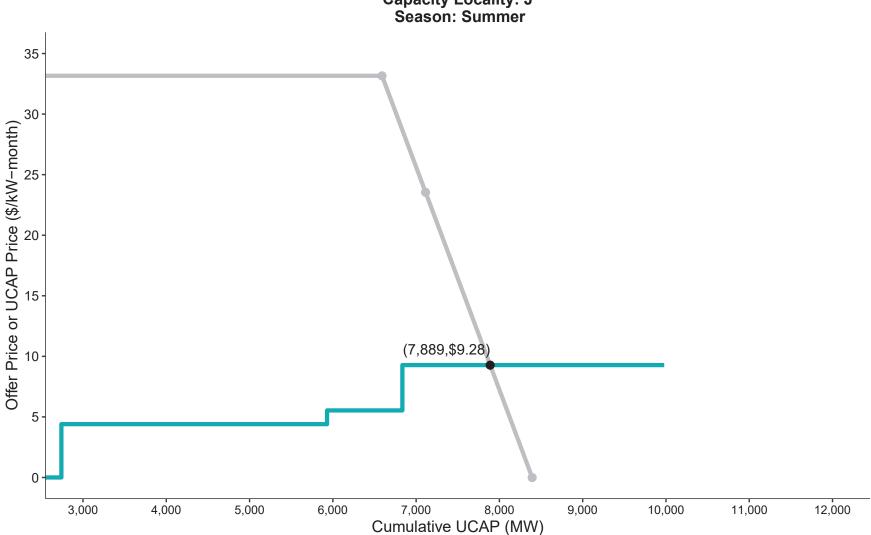
### **Supply and Demand Curves** Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2032

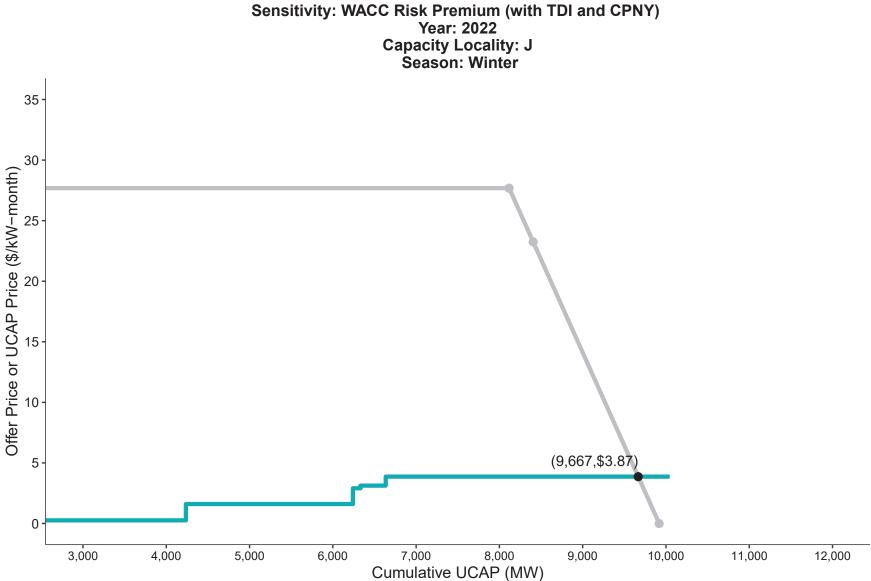


Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2026 Capacity Locality: J Season: Summer

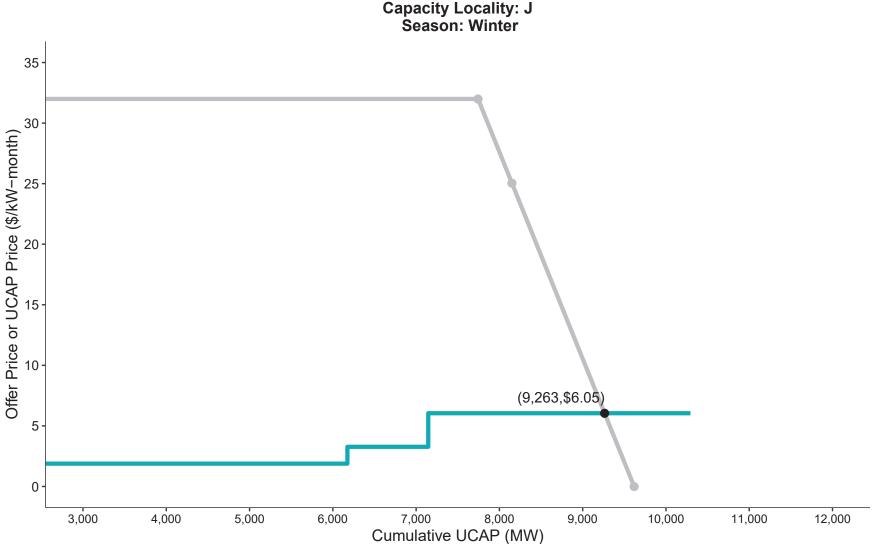


Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2032 Capacity Locality: J Season: Summer

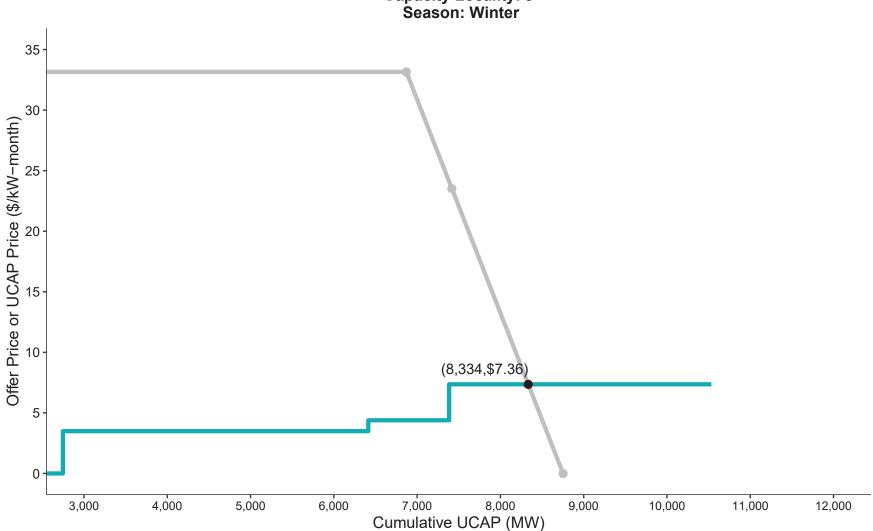




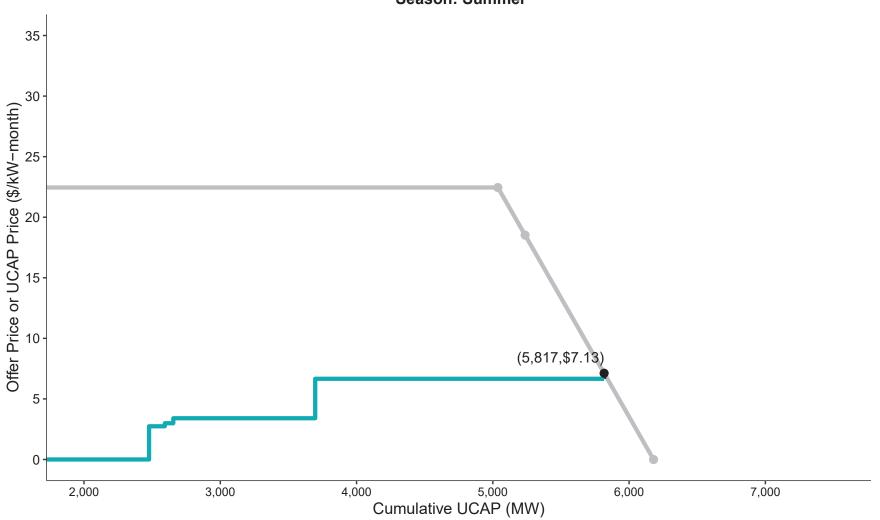
Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2026 Capacity Locality: J Season: Winter



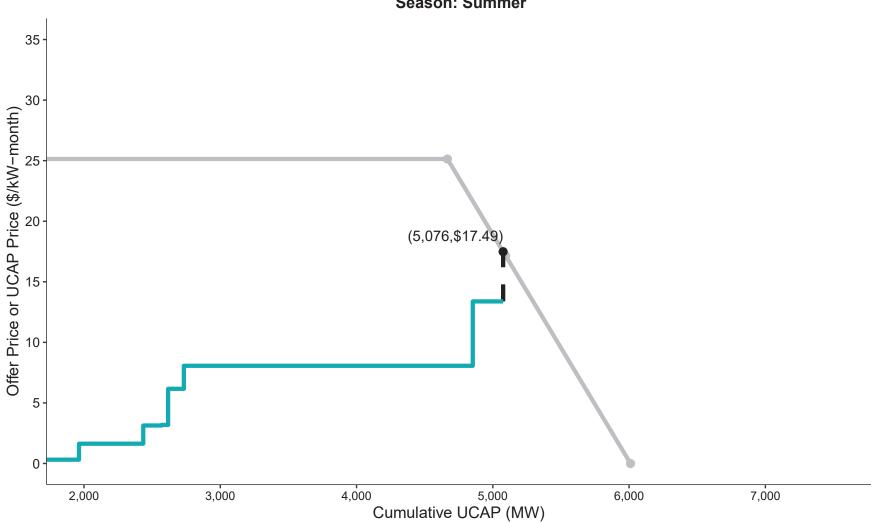
Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2032 Capacity Locality: J Season: Winter





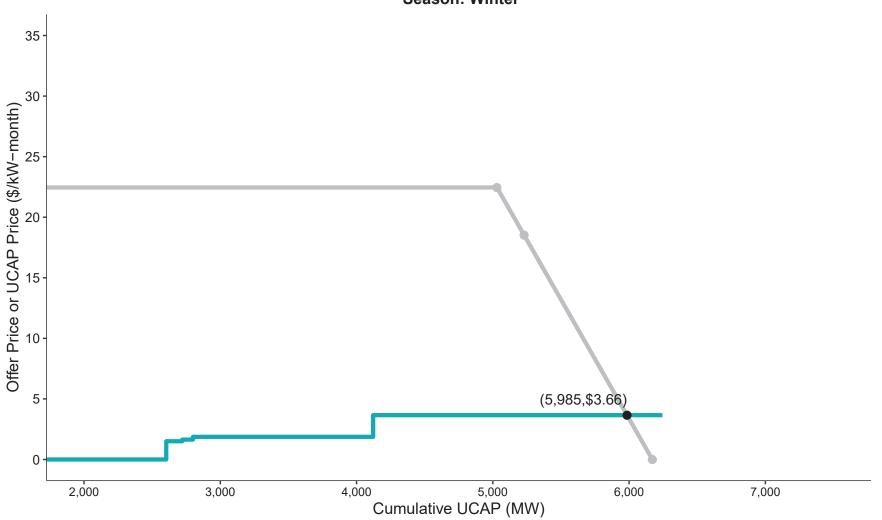


Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2026 Capacity Locality: K Season: Summer

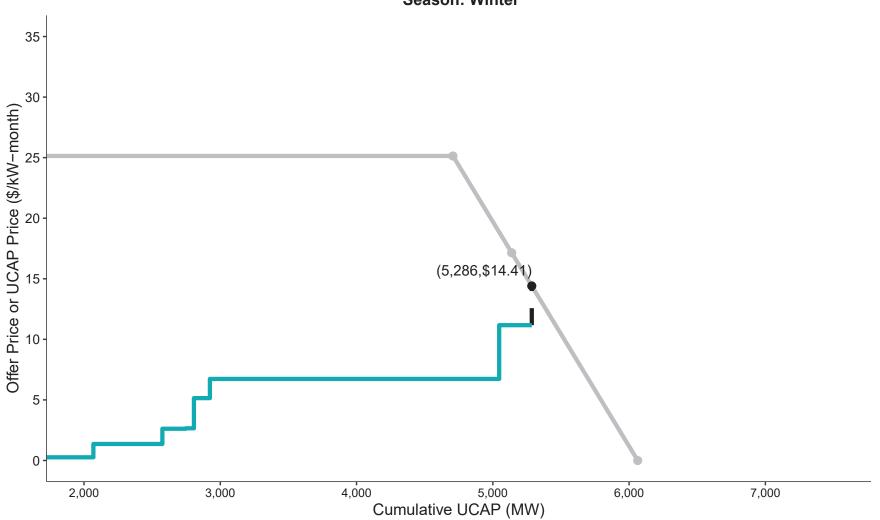


Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2032 Capacity Locality: K Season: Summer 35 Offer Price or UCAP Price (\$/kW-month) 0 21 05 57 00 01 01 02 (5,429,\$17.31) 5 0. 3,000 6,000 7,000 2,000 4,000 5,000 Cumulative UCAP (MW)

#### Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2022 Capacity Locality: K Season: Winter



Supply and Demand Curves Sensitivity: WACC Risk Premium (with TDI and CPNY) Year: 2026 Capacity Locality: K Season: Winter



Capacity Locality: K Season: Winter 35 Offer Price or UCAP Price (\$/kW-month) 0 21 05 57 00 01 01 02 (5,676,\$15.71) 5 0 -3,000 4,000 6,000 7,000 2,000 5,000 Cumulative UCAP (MW)



#### Supply Inputs Sensitivity: Alternate Peaking Technology

NYCA Summer Capacity	20	)22	2(	026	20	)32
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	26,315	24,322	23,481	21,833	23,485	21,836
Hydro	5,018	4,210	5,018	4,210	5,018	4,210
Nuclear	3,345	3,266	3,345	3,266	2,156	2,105
Onshore Wind	1,739	278	1,983	210	9,698	633
Offshore Wind	0	0	1,200	349	7,591	362
Utility-Scale Solar	56	26	5,056	942	16,669	702
Storage (2h)	592	258	2,156	816	4,264	1,266
Storage (4h)	2	2	9	7	386	229
Net Imports	973	973	973	973	973	973
SCRs	1,185	1,067	1,185	1,185	1,185	1,185
UDRs	1,042	1,042	1,042	1,042	1,042	1,042
Other Resources	2,671	2,541	2,571	2,450	3,251	3,109
TDI	0	0	0	0	0	0
Total	42,939	37,985	48,021	37,283	75,719	37,653

G-J Summer Capacity	20	022 20		2026		2032	
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP	
Fossil Fuel	14,029	12,951	12,306	11,417	12,306	11,417	
Hydro	101	52	101	52	101	52	
Nuclear	0	0	0	0	0	0	
Onshore Wind	0	0	0	0	0	0	
Offshore Wind	0	0	694	202	5,060	241	
Utility-Scale Solar	0	0	0	0	944	40	
Storage (2h)	1	1	1,343	509	1,436	426	
Storage (4h)	0	0	4	3	158	94	
Net Imports	0	0	0	0	0	0	
SCRs	523	470	523	523	523	523	
UDRs	299	299	299	299	299	299	
Other Resources	19	18	75	72	339	328	
TDI	0	0	0	0	0	0	
Total	14,972	13,791	15,345	13,077	21,165	13,420	

#### Supply Inputs Sensitivity: Alternate Peaking Technology

J Summer Capacity	20	)22	20	)26	20	)32
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	9,519	8,775	7,796	7,241	7,796	7,240
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	694	202	5,060	241
Utility-Scale Solar	0	0	0	0	0	0
Storage (2h)	1	0	1,342	508	1,433	425
Storage (4h)	0	0	4	3	157	93
Net Imports	0	0	0	0	0	0
SCRs	428	385	428	428	428	428
UDRs	299	299	299	299	299	299
Other Resources	0	0	54	52	239	232
TDI	0	0	0	0	0	0
Total	10,247	9,459	10,618	8,733	15,412	8,959

K Summer Capacity	20	2022 2026		026	2	032
by Unit Type (MW)	ICAP	UCAP	ICAP	UCAP	ICAP	UCAP
Fossil Fuel	5,148	4,636	4,037	3,681	4,037	3,681
Hydro	0	0	0	0	0	0
Nuclear	0	0	0	0	0	0
Onshore Wind	0	0	0	0	0	0
Offshore Wind	0	0	506	147	2,531	121
Utility-Scale Solar	56	26	56	11	56	2
Storage (2h)	589	257	812	307	1,378	409
Storage (4h)	2	1	4	3	223	132
Net Imports	0	0	0	0	0	0
SCRs	43	39	43	43	43	43
UDRs	743	743	743	743	743	743
Other Resources	121	115	157	150	326	314
TDI	0	0	0	0	0	0
Total	6,703	5,818	6,357	5,085	9,336	5,445

#### Demand Inputs Sensitivity: Alternate Peaking Technology

UCAP Reference Point Price (\$/kW-mo)		Summer				
	2022	2026	2032	2022	2026	2032
NYCA	\$9.43	\$16.96	\$17.10	\$9.43	\$16.96	\$17.10
G-J Locality	\$15.12	\$19.83	\$19.56	\$15.12	\$19.83	\$19.56
NYC (J)	\$23.25	\$25.80	\$25.74	\$23.25	\$25.80	\$25.74
LI (K)	\$18.53	\$17.86	\$17.30	\$18.53	\$17.86	\$17.30

UCAP/ICAP Translation Factors (%)		Summer			Winter		
	2022	2026	2032	2022	2026	2032	
NYCA	12.4%	24.4%	53.2%	11.3%	24.8%	52.8%	
G-J Locality	8.0%	15.6%	38.1%	7.8%	14.9%	36.5%	
NYC (J)	7.8%	19.1%	43.9%	7.7%	18.0%	41.9%	
LI (K)	14.9%	22.8%	45.5%	15.0%	22.2%	44.1%	

UCAP Capacity Requirement (MW)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	34,429	33,284	34,733	34,835	33,122	35,055
G-J Locality	12,816	11,689	12,499	12,835	11,792	12,810
NYC (J)	8,397	8,051	8,348	8,405	8,151	8,652
LI (K)	5,237	5,094	5,546	5,229	5,138	5,691

UCAP Reserve Margin (%)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	107.9%	104.9%	98.0%	109.1%	104.4%	98.9%
G-J Locality	85.7%	79.2%	76.8%	85.9%	79.9%	78.7%
NYC (J)	77.8%	75.8%	71.5%	77.9%	76.7%	74.1%
LI (K)	96.9%	93.9%	88.1%	96.7%	94.7%	90.4%

IRM/LCR (%)	Summer			Winter		
	2022	2026	2032	2022	2026	2032
NYCA	123.1%	138.9%	209.6%	123.1%	138.9%	209.6%
G-J Locality	93.2%	93.9%	123.9%	93.2%	93.9%	123.9%
NYC (J)	84.4%	93.6%	127.5%	84.4%	93.6%	127.5%
LI (K)	113.8%	121.7%	161.6%	113.8%	121.7%	161.6%

## Outputs Sensitivity: Alternate Peaking Technology

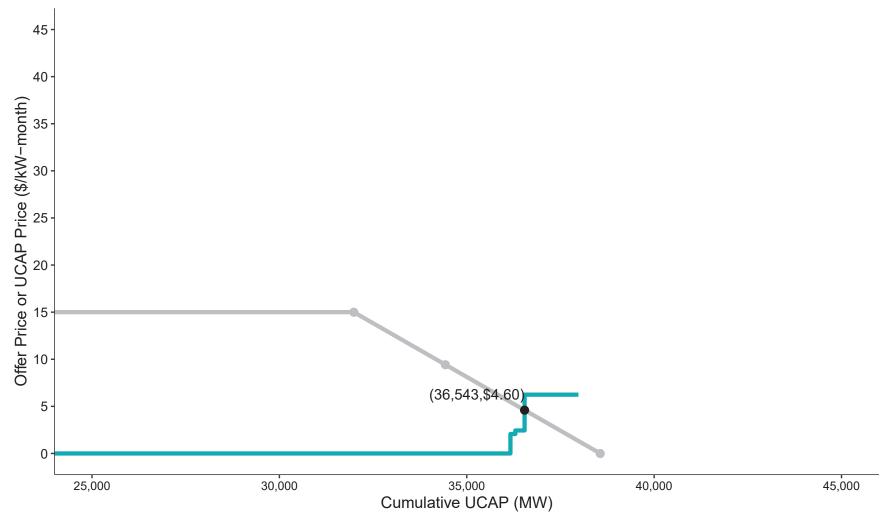
Clearing Prices	Summer			Winter		
(\$/kW-mo)	2022	2026	2032	2022	2026	2032
NYCA	\$4.60	\$7.37	\$7.81	\$3.33	\$5.13	\$6.67
G-J Locality	\$7.46	\$9.02	\$12.09	\$3.87	\$5.81	\$7.93
NYC (J)	\$7.46	\$15.35	\$18.14	\$3.87	\$8.98	\$14.28
LI (K)	\$7.13	\$18.21	\$19.33	\$3.66	\$15.01	\$17.55

Clearing UCAP	Summer			Winter		
Quantities (MW)	2022	2026	2032	2022	2026	2032
NYCA	36,543	35,541	36,998	37,540	35,894	37,620
G-J Locality	13,791	12,644	13,215	14,268	13,043	13,952
NYC (J)	9,459	8,638	8,792	9,667	9,107	9,345
LI (K)	5,817	5,076	5,429	5,985	5,286	5,676

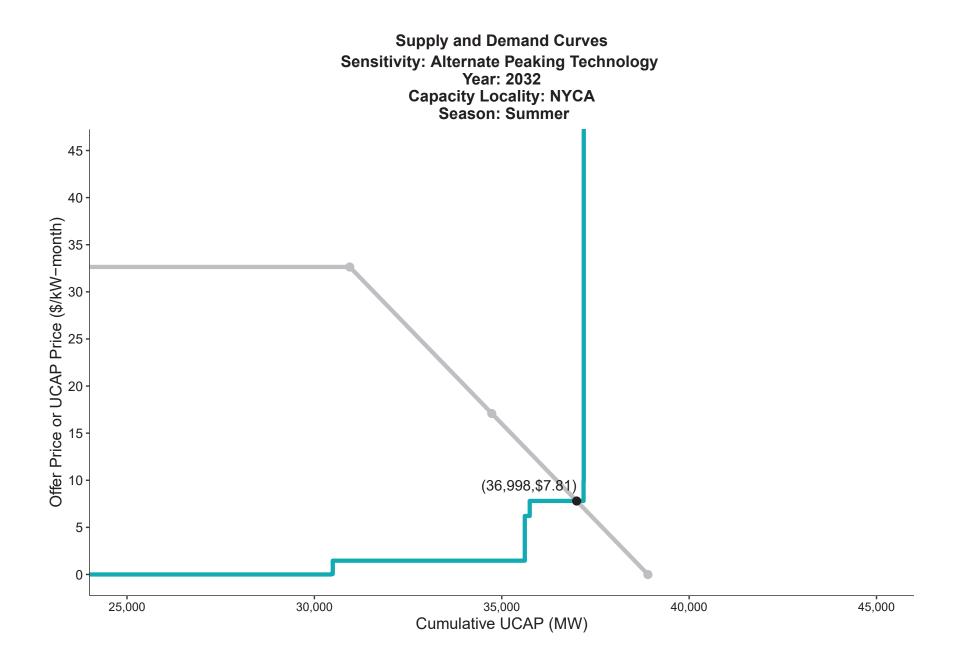
### Note:

[1] Supply and Demand Curves show "unadjusted" clearing prices. The final clearing price in each capacity locality is the highest price for which capacity segments in that locality are eligible.

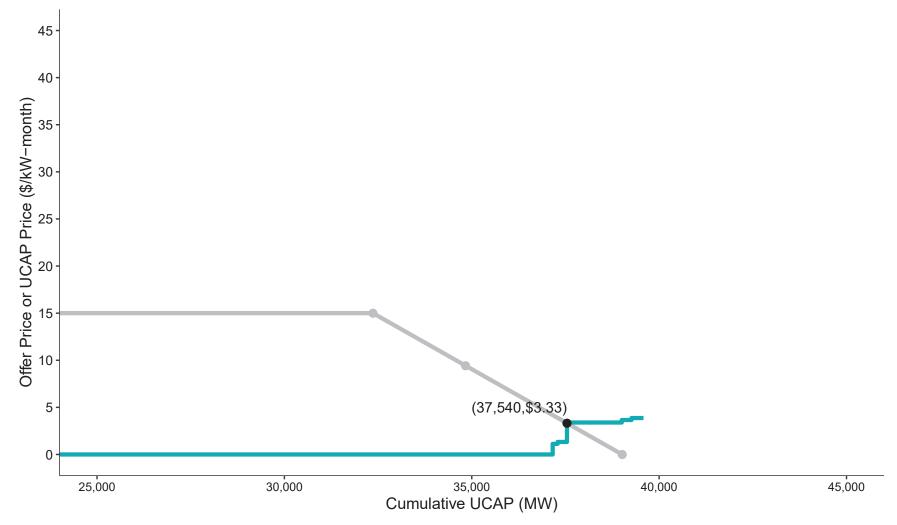
Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: NYCA Season: Summer

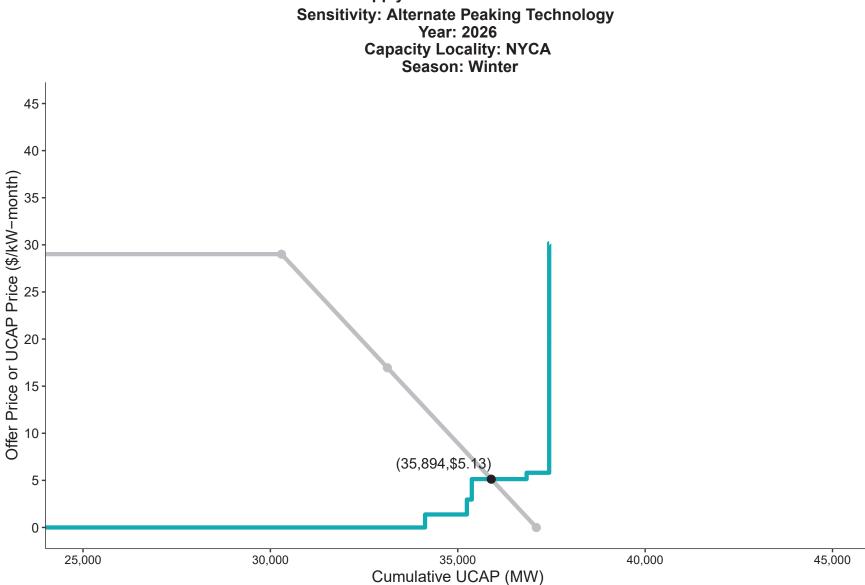


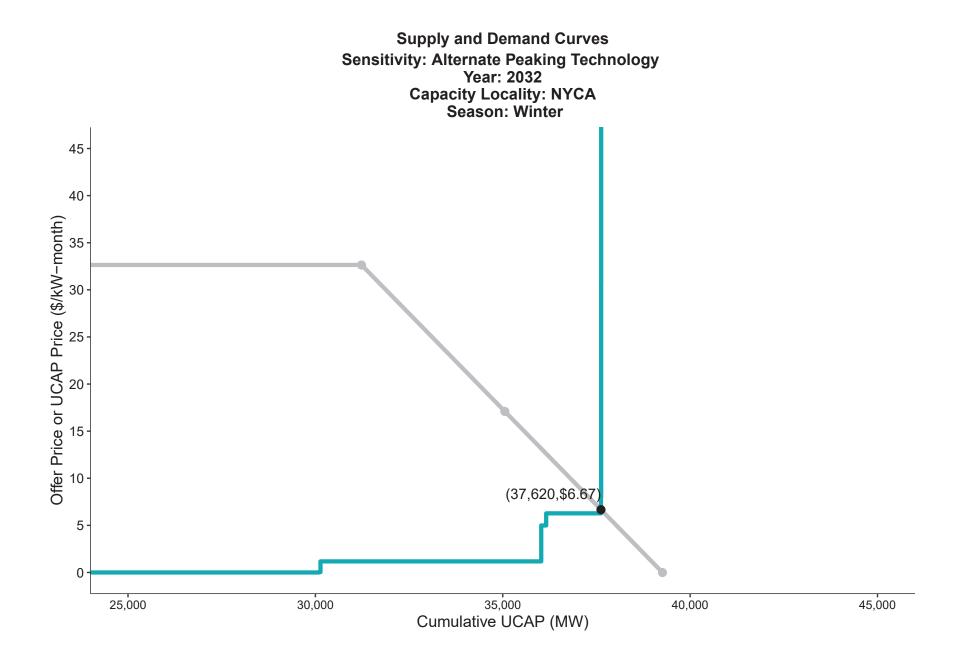
**Supply and Demand Curves** Sensitivity: Alternate Peaking Technology Year: 2026 Capacity Locality: NYCA Season: Summer 45 40 Offer Price or UCAP Price (\$/kW-month) (35,541,\$7.37) 5 0 35,000 Cumulative UCAP (MW) 25,000 30,000 40,000 45,000



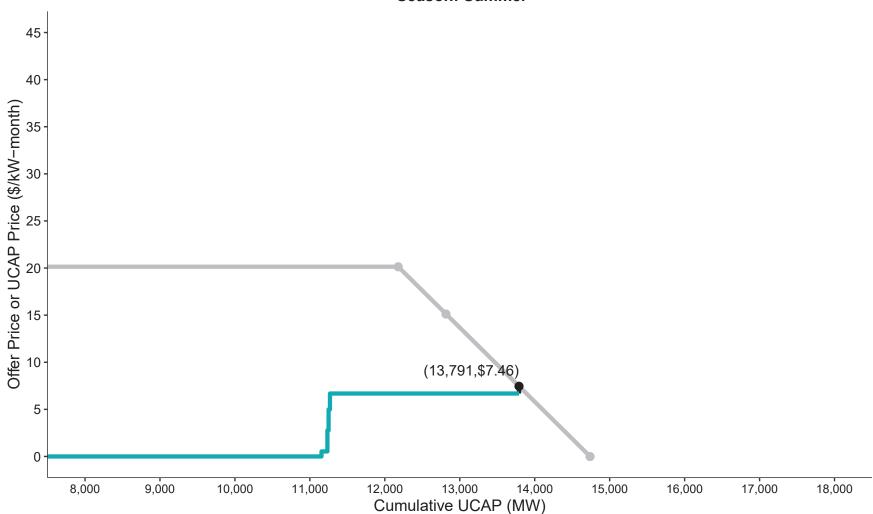
## Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: NYCA Season: Winter

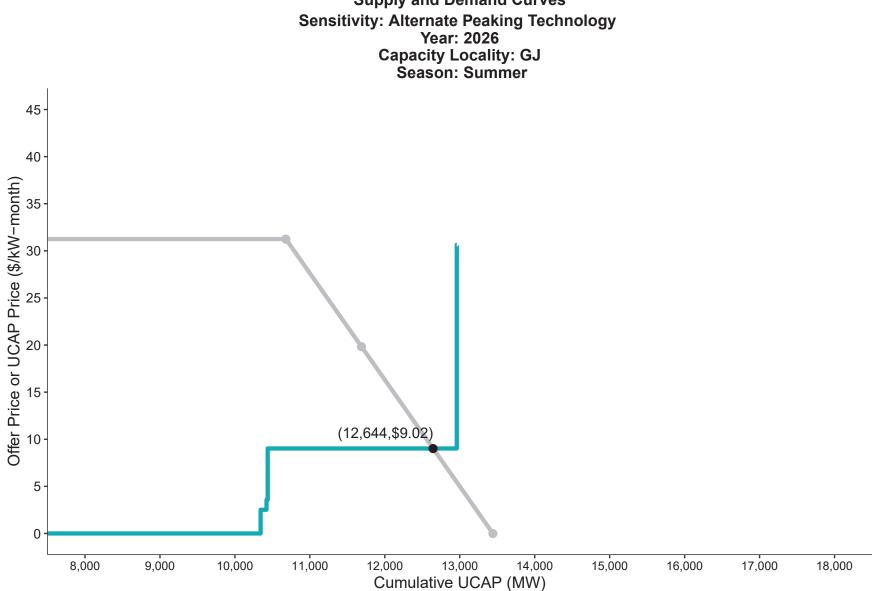




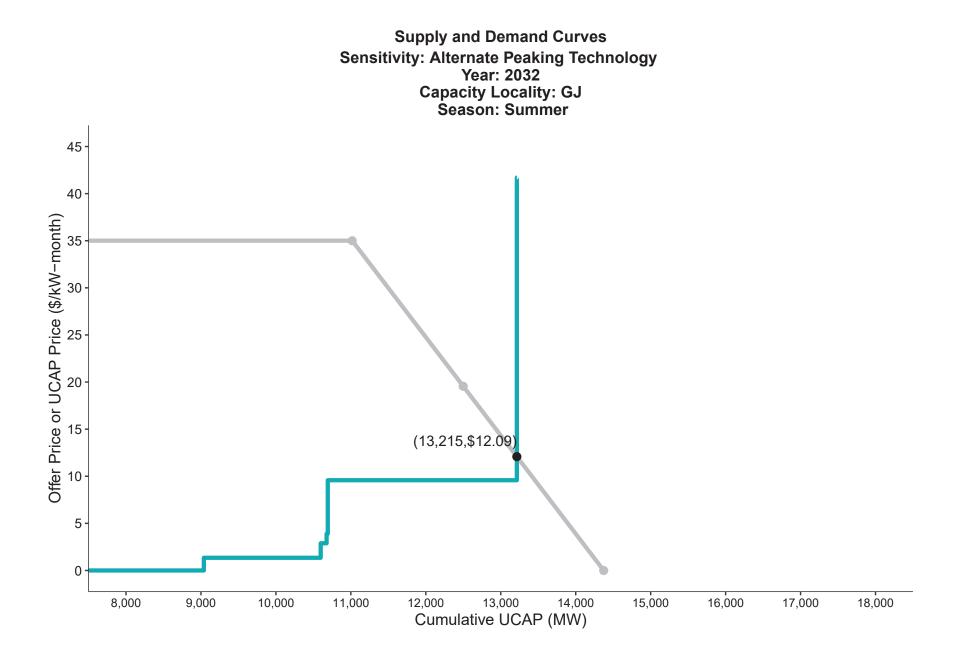


## Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: GJ Season: Summer

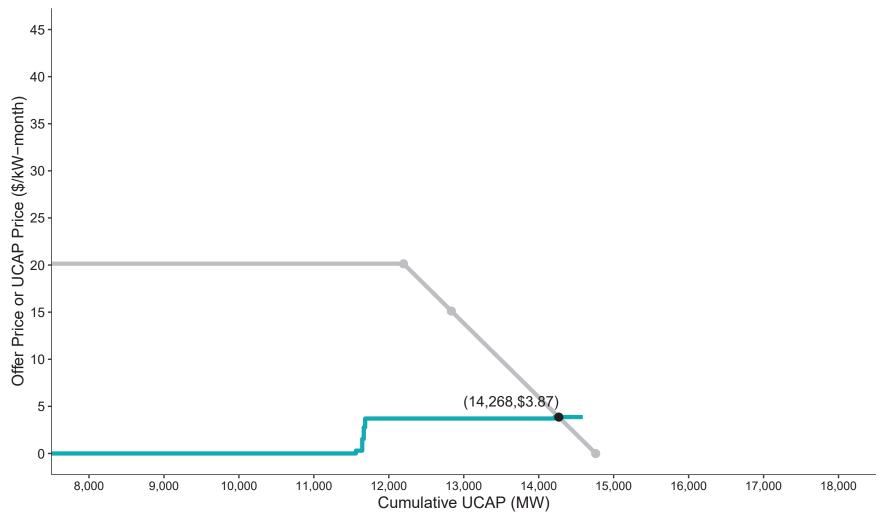


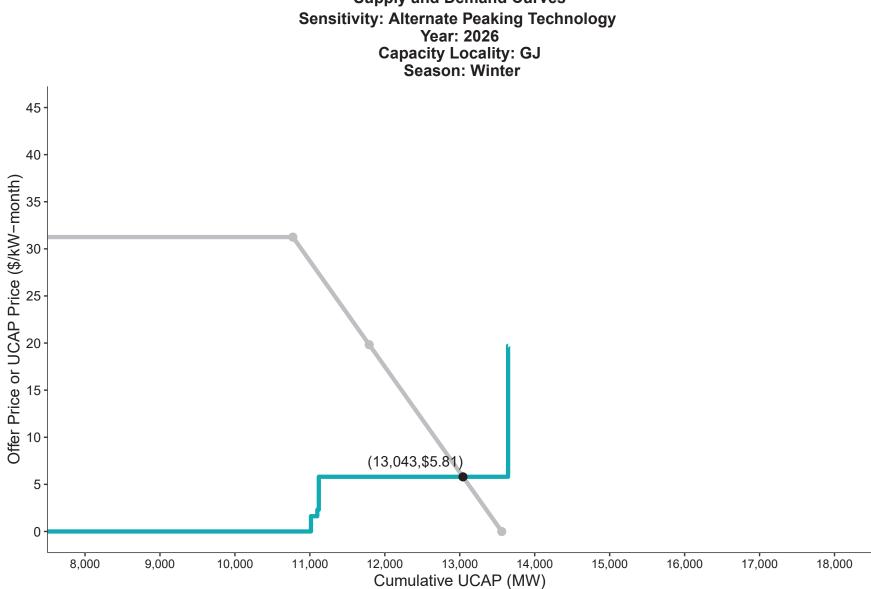


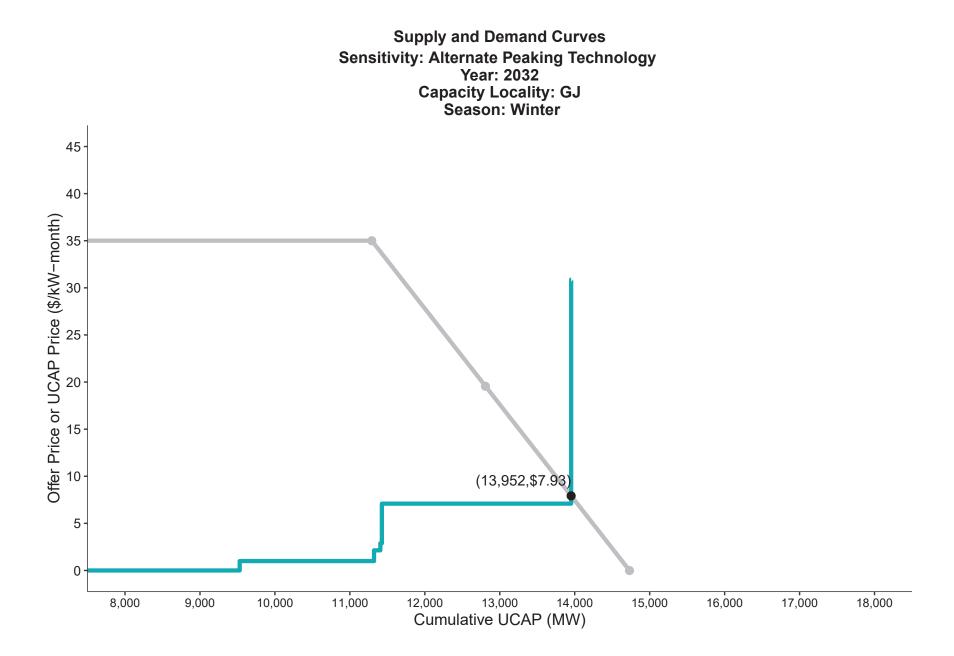
**Supply and Demand Curves** 

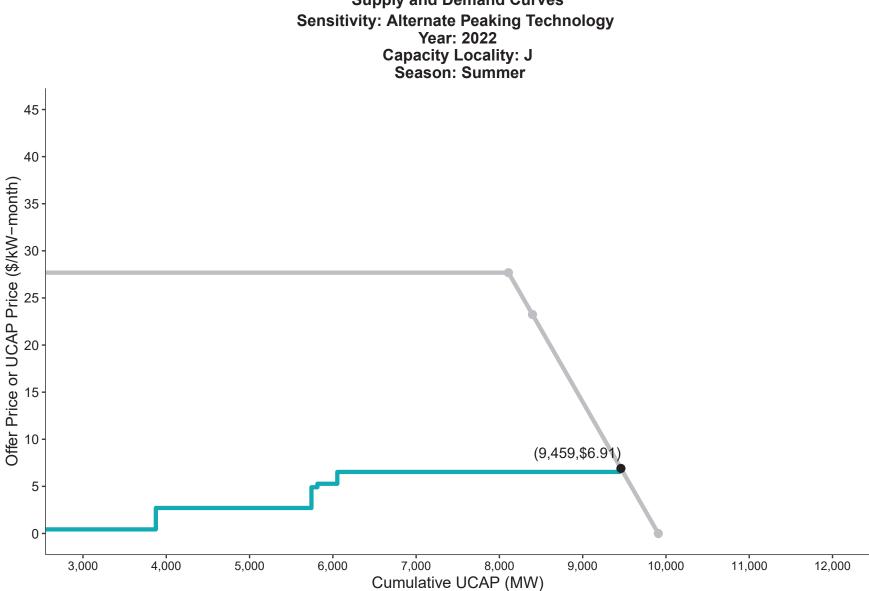


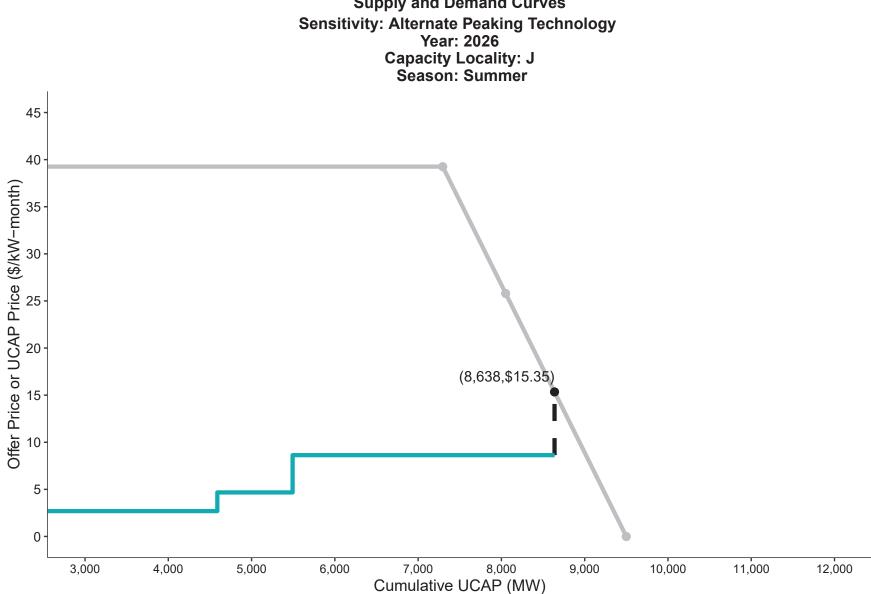
## Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: GJ Season: Winter



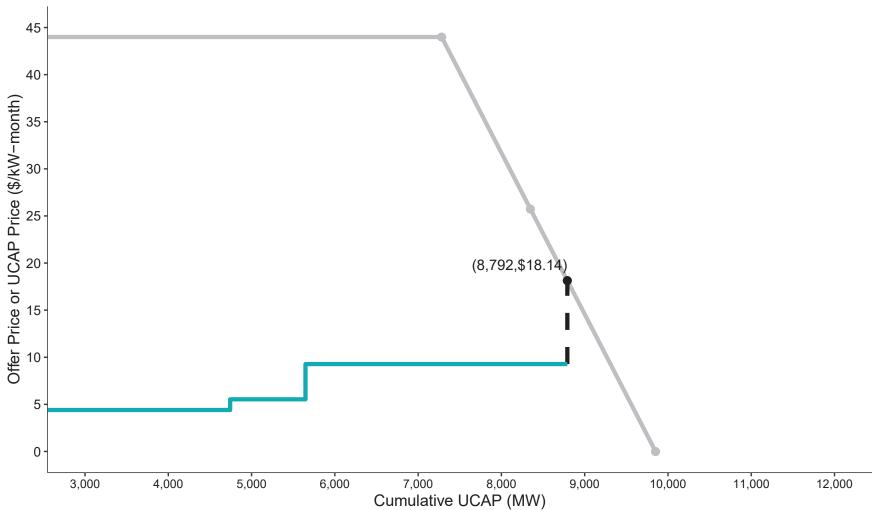




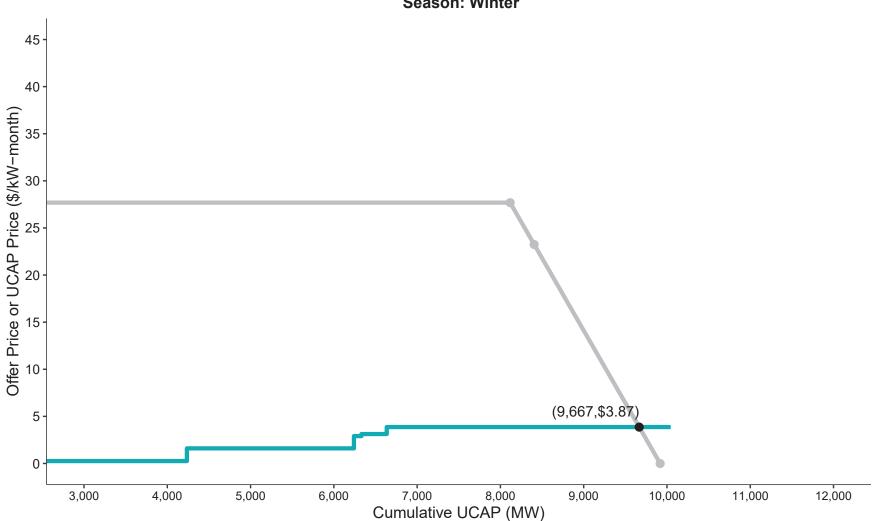


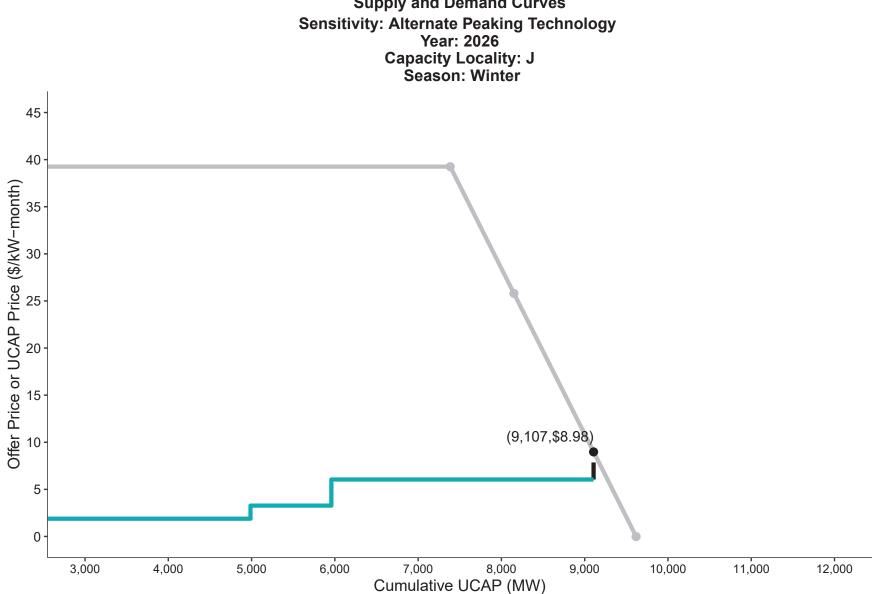


Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2032 Capacity Locality: J Season: Summer



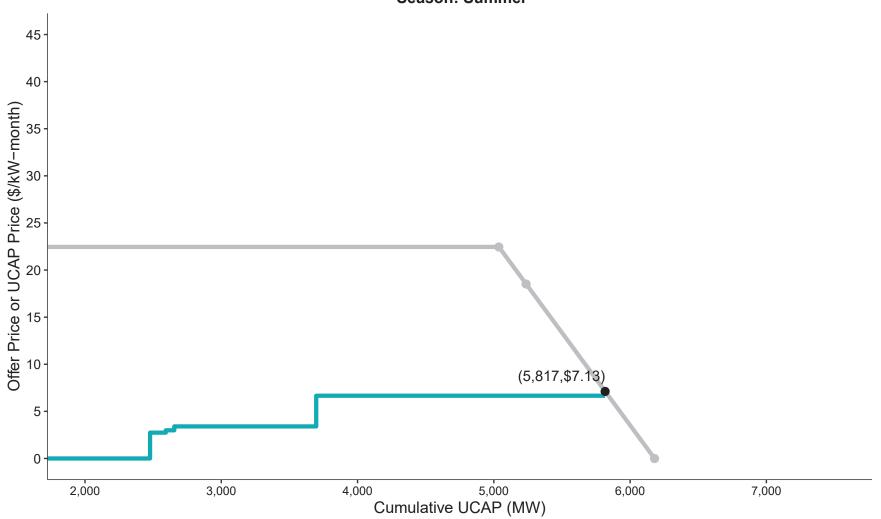
## Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: J Season: Winter

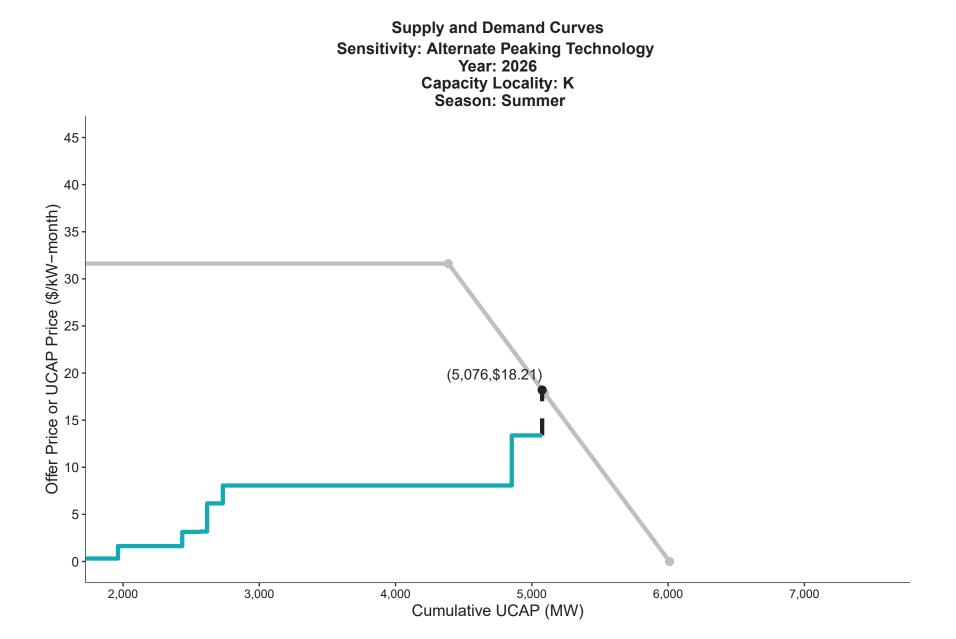


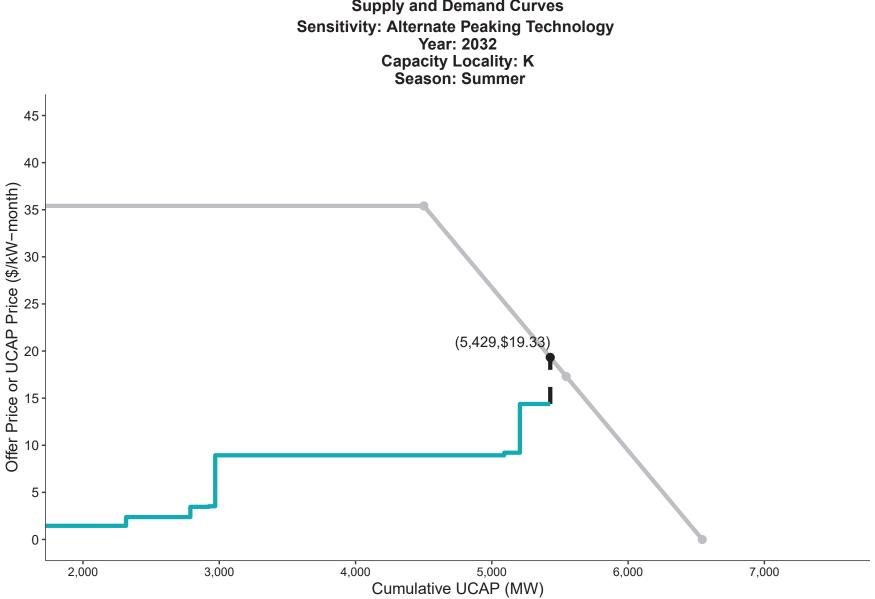


**Supply and Demand Curves** Sensitivity: Alternate Peaking Technology Year: 2032 Capacity Locality: J Season: Winter 45 40 (9,345,\$14.28) 5 0 6,000 4,000 5,000 7,000 8,000 9,000 10,000 11,000 12,000 3,000 Cumulative UCAP (MW)

## Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: K Season: Summer







## Supply and Demand Curves Sensitivity: Alternate Peaking Technology Year: 2022 Capacity Locality: K Season: Winter

