

Integrated Energy Data Resource (IEDR) Program Quarterly Report through March 31, 2026

Final Report | April 2026



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New York State Energy Research
and Development Authority

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NYSERDA catalyzes New York's clean energy transition.

Our Vision:

Clean energy that supports a healthier and thriving future for all New Yorkers.

Our Promise to New Yorkers:

NYSERDA serves New York State as a trusted and credible resource for energy information, policies, and programs, through objective analysis and planning, innovative solutions, and impactful investments that are valued by New York residents and businesses.

Integrated Energy Data Resource (IEDR) Program Quarterly Report through March 31, 2026

Final Report

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Albany, NY

April 2026

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Abstract

The Integrated Energy Data Resource (IEDR) Program Quarterly Report is intended to inform the Public Service Commission (PSC), market participants, and other parties interested in the progress of the IEDR Program. More specifically, this report provides information on progress made in achieving the IEDR Program's stated goals and objectives.

Keywords

Integrated Energy Data Resource, IEDR, use case, IEDR Advisory Group, IEDR Steering Committee, Utility Coordination Group

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Acronyms and Abbreviations

AG	Advisory Group
Central Hudson	Central Hudson Gas & Electric Corporation
Climate Act	Climate Leadership and Community Protection Act
Con Edison	Consolidated Edison, Inc.
DAC	disadvantaged community
DAF	data access framework
DER	distributed energy resource
DPS	New York State Department of Public Service
IEDR	Integrated Energy Data Resource
IEDR Order	Order Implementing an Integrated Energy Data Resource
IEDR Phase 2 Order	Order Approving Integrated Energy Data Resource Phase 2 Budgets
JU	Joint Utilities of New York
LIPA	Long Island Power Authority
MVP	Minimum Viable Product
NYPA	New York Power Authority
NYSEG	New York State Electric and Gas
O&R	Orange & Rockland Utilities, Inc.
PM&C	Program Management and Control
PSC	New York State Public Service Commission
PSIP	Program Sponsor Implementation Plan
RFP	request for proposals
RG&E	Rochester Gas and Electric Corporation
SMEs	subject matter experts
UCG	Utility Coordination Group

1. Background

Through changes in its energy policy, New York State is transforming its electricity system into one that is cleaner, more resilient, and affordable. However, effective access to useful energy-related data is required to achieve these goals. The urgency of providing this data has increased with the State's enactment of the Climate Leadership and Community Protection Act (Climate Act).

On February 11, 2021, the New York State Public Service Commission (PSC) issued its Order Implementing an Integrated Energy Data Resource (IEDR Order)¹ and directed the implementation of an IEDR to securely collect, integrate, and provide broad and appropriate access to large and diverse sets of useful energy-related information on one statewide data platform. The IEDR Order designated the New York State Energy Research and Development Authority (NYSERDA) as the IEDR Program Sponsor responsible for defining, initiating, overseeing, and facilitating the IEDR Program on behalf of New York State.

The IEDR Order directs NYSEDA to file quarterly reports in this proceeding, with reports filed at the end of April, July, October, and January for the prior quarter, including information from the Program Manager's monthly reports, addressing all aspects of the IEDR Program. As directed, these program reports will—in the context of the schedule and budget—describe and explain (where necessary) the program's accomplishments and expenditures to date, current work, and expenditures in progress, the latest program risk assessment and mitigation plan, and upcoming work and expenditures.

In issuing the IEDR Order, the PSC adopted the detailed approach and plan for the establishment of an IEDR presented in a whitepaper published by the Staff of the New York State Department of Public Service (DPS) in May 2020.²

The IEDR Order articulated the foundational principles for the development of the IEDR through the entire life cycle of the initiative and stated that the IEDR will be guided by the policy of obtaining the best overall value for New York State. Such program guiding principles included involving stakeholders to accelerate implementation timelines, reducing initiative costs and risks, and protecting the agreed-upon scope by partnering with high-quality service providers, aligning with the State's values.³

NYSERDA, as the Program Sponsor, has established a process based on three commitments:

1. Effective and extensive collaboration with and among stakeholders, including the State's utilities.
2. Procuring the services of individuals and organizations that possess the necessary expertise and experience in the development, implementation, and operation of a data platform of similar scale and scope.
3. Unambiguous regulatory requirements, including firm schedules and milestones.

On April 15, 2021, the PSC issued an Order to establish a uniform and comprehensive data access framework (DAF) to govern the means and methods for accessing and protecting all types of energy-related information.⁴ This Order was based on DPS Staff recommendations.⁵ Accordingly, all aspects of designing and operating the IEDR will comply with any such framework that the PSC may establish.

The IEDR Order designated NYSERDA to assume the role of the IEDR Program Sponsor and assigned responsibility for defining, initiating, overseeing, and facilitating the IEDR Program on behalf of the State. The Program Sponsor's principal duties include the following:

1. Creating the IEDR Program Charter to formally establish the IEDR Program's purpose, scope, guiding principles, objectives, participants, roles, and responsibilities.
4. Organizing the membership and initial meeting schedule for an IEDR Steering Committee.
5. Organizing the membership and initial meeting schedule for an IEDR Program Advisory Group (AG).
6. Organizing the membership and initial meeting schedule for an IEDR Program Utility Coordination Group (UCG).
7. Specifying, procuring, and administering the services provided by a professional program manager.
8. Providing the means and methods for expending the PSC-directed funding related to the program and reporting of such expenditures and IEDR Program progress.
9. Ensuring robust stakeholder engagement throughout the life of the IEDR Program through multiple means of communication.
10. Monitoring adherence to the Program Charter by all program participants.
11. Helping the Program Manager investigate and resolve issues that could negatively affect costs, schedule, or benefits.

The IEDR Order establishes the regulatory expectation that the IEDR will enable approximately 50 use cases over Phases 1 and 2 and specific deadlines for achieving minimum performance capabilities. This approach enables the development, implementation, and operation of the IEDR in meaningful and achievable segments. Specifically, the PSC established a two-phase schedule for the development and operation of the IEDR:

- Phase 1: The initial IEDR implementation will enable at least 5 of the highest priority use cases, with an expectation that 10 or more could be achieved. Phase 1 will be completed within 24–30 months of the work’s commencement by the Program Manager (on or about April 1, 2024).
- Phase 2: The initial IEDR will expand and enhance approximately 40 additional use cases, building on the successful implementation and operation of Phase 1. Phase 2 will be completed 30–36 months after the completion of Phase 1 (about October 1, 2026–April 1, 2027).

The IEDR Order further recognizes that details associated with the development, design, and implementation of each phase of the IEDR Program must be preceded by specific activities requiring planning that will impact the scheduling of subsequent activities and the establishment of milestones. These activities include obtaining:

- Advice and recommendations of stakeholders through workshops and technical conferences.
- The services of a Program Manager, Solution Architect, and other professional resources as described in the IEDR Order.
- A workplan and budget from the Program Manager for both Phase 1 and Phase 2.
- Recommendations of the AG.

1.1 Stakeholder Engagement Background

The IEDR Order⁶ articulates policy objectives and establishes venues and processes intended to ensure the broadest possible opportunities for stakeholder contributions throughout the entire life cycle of the IEDR initiative. Robust stakeholder engagement is required to ensure that the centralized platform provided by the IEDR will be a trusted resource that all interested parties and stakeholders can use to efficiently access and analyze pertinent elements of the State’s energy system and customer information. Furthermore, stakeholder engagement will play a critical role in defining and prioritizing the many use cases anticipated by the IEDR Order. The IEDR Order provides for the establishment of an AG that will bring together a broad spectrum of stakeholder perspectives to inform the design and operation of the IEDR. The Program Sponsor will organize, convene, and facilitate the work of the AG.

Achieving the breadth and depth of stakeholder participation envisioned by the IEDR Order requires meaningful opportunities for broad stakeholder engagement that complements and contributes to the AG's work. To that end, the Program Sponsor will continue to provide all interested stakeholders with meaningful opportunities to contribute to the development of the IEDR through a robust schedule of workshops, technical conferences, periodic reports, and other formats.

These activities are and will continue to be designed in consultation with stakeholders, the AG, the Steering Committee, and the Program Manager. Overall responsibility and accountability for stakeholder engagement reside with the Program Sponsor, who will continue to collaborate with and call on the Program Manager to facilitate stakeholder engagement activities.

1.1.1 The Ideas Portal

During Phase 1 of program operations, direct engagement between the IEDR user community and the Development Team was enabled through an Ideas Portal, launched on March 31, 2023, and which continues to facilitate conversations between the IEDR Program Team and IEDR users. The Ideas Portal (<https://iedr.ideas.aha.io/>) allows IEDR users to provide asynchronous feedback regarding feature improvements and requests for new datasets. IEDR support (iedr-support@esource.com) is also available for users to report bugs or other issues experienced while navigating the platform.

1.1.2 IEDR YouTube Playlist

In Q2 2024, the IEDR Program Team developed and published five IEDR demonstration videos on NYSERDA's YouTube channel. These initial videos provide high-level demonstrations of what the IEDR is and IEDR tool functionality. These videos are intended to provide an accessible educational resource for the IEDR's general stakeholder community that drives users to the IEDR and promotes the effective use of the IEDR among the IEDR stakeholder community. Throughout Phase 2, new videos will be developed and published to coincide with major platform releases and/or new platform modules. The initial five videos and future IEDR YouTube content can be accessed through NYSERDA's YouTube channel in the dedicated [IEDR playlist](#).

1.2 The Transition from Phase 1 to Phase 2 of the IEDR Program

On May 12, 2023, NYSERDA submitted a proposal for the structure and funding of Phase 2 of the IEDR Program. In response to the Phase 2 Proposal, on January 19, 2024, the PSC issued its Order Approving Integrated Energy Data Resource Phase 2 Budgets (IEDR Phase 2 Order).

The IEDR Phase 2 Order approved funding for Phase 2 of the IEDR Program, which officially began on April 1, 2024. Phase 2 funding will support the established regulatory expectations that the IEDR will leverage the accomplishment of Phase 1 to enable approximately 40 additional use cases by the end of Phase 2.

The IEDR Phase 2 Order acknowledged the continuation of established program participant roles of the Program Sponsor (NYSERDA), the Program Manager (currently Deloitte Consulting LLP), the Development Team (currently led by E Source Companies LLC), and the Utility Data Advisor (currently Pecan Street, Inc.). The Order also acknowledged that Phase 2 funding includes dedicated administrative funds, as requested in the Phase 2 Proposal, for contracting with or reimbursing organizations that support disadvantaged communities (DACs), to ensure that DAC use cases and functionality are prioritized. The IEDR Phase 2 Order further directed NYSERDA to file a Phase 2 Status and Summary Report on or before April 1, 2026, and acknowledged that, based on the sole discretion of the Secretary, the deadlines set forth in the latest Order may be extended.

1.3 Phase 2 Milestones

Initial Phase 2 planning projections account for two Phase 2 program milestones. The IEDR Phase 2 Order⁷ established one additional IEDR program milestone, the Phase 2 Status and Summary Report milestone, which is anticipated to be filed on or before April 1, 2026. The previous Phase 1 program milestone, Platform User Conference, was determined to be more suited as a Phase 2 program activity and is now being tracked accordingly. Additional information on these two milestones and any potential emergent Phase 2 program milestones will be reflected in future Quarterly Reports.

Table 1. Phase 2 Milestone Status

Milestone	Program Topic	Date Expected	Status
Phase 2 Status and Summary Report	Reporting	On or before April 1, 2026	Not Started
Platform User Conference	Stakeholder Engagement	TBD within Phase 2	Not Started

1.4 Phase 2 Use Case Development Background

Phase 2 use cases are currently in draft status. As use cases progress through the discovery and development process, they may be updated to reflect newly discovered requirements, more accurate summations and/or labeling, or other changes in use case scope that are not currently defined. Future IEDR Program Quarterly Reports will detail any potential updates to the Phase 2 use case scope. Phase 2 use case release timeframes will be updated as the IEDR platform development progresses and as use case development scope and related timelines are further defined. As Phase 2 use cases are developed, use case features and functionality will be incrementally released within the IEDR. More information about the timing of upcoming IEDR platform releases and the specific features and functionality contained within releases is made available in the [IEDR Detailed Roadmap](#).⁸ Full descriptions of projected Phase 2 use cases can be found in Appendix C of the [IEDR Phase 2 Proposal](#)⁹ or in this reference document.¹⁰

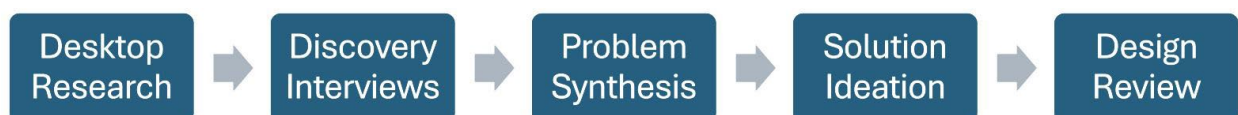
1.4.1 Defining the Use Case Discovery Process

Use case discovery activities inform the foundational requirements for use case development. These activities include performing desktop research, conducting discovery interviews, defining problem statements, ideating solutions, and performing design reviews. Once the design reviews are completed, use cases are scoped and prioritized for development. Discovery user interviews are performed by engaging with members of the Tier 2 AG; information about Tier 2 AG activities can be found in the Stakeholder Engagement section (Section 2) of this Quarterly Report.

Discovery process definitions:

- **Desktop research:** Gather information and insights that will inform development.
- **Discovery interviews:** Conduct interviews to understand user needs and pain points.
- **Problem synthesis:** Synthesize information from desktop research and user interviews to define and understand problems.
- **Solution ideation:** Create draft solutions to the given set of defined problems.
- **Design review:** Iteratively draft and review solution prototypes.

Figure 1. Use Case Discovery Process Flow



1.4.2 Thematic Use Case Discovery

Previously in Q3 2024, the IEDR Program Team established a new organizational approach to discovery activities, aiming to improve discovery completion timelines, referred to as thematic use case discovery. Moving forward, use cases will be thematically grouped for discovery by consolidating user interviews across personas spanning multiple use cases. For example, a building and/or energy manager (persona) may be able to provide insights into multiple use cases within the Comprehensive Whole Building Energy Consumption Analysis thematic group during a single interview.

This approach to consolidating efforts related to preparing for, scheduling, and conducting individual discovery interviews is projected to reduce time and resource expenditures throughout the discovery process. As they are performed, discovery activities will validate thematic use case groupings; as such, themed groupings of use cases are mutable and subject to evolving over time. More information on thematic groups and the associated use cases will be made available in future Quarterly Reports.

1.4.3 Identified Themes

Table 2 indicates identified use case themes. As discovery activities continue to progress and thematic use case associations are validated, Phase 2 use cases will be mapped to the identified themes below and documented in future Quarterly Reports.

Table 2. Identified Use Case Themes

Use Case Themes
• Community Energy Planning
• Comprehensive Whole Building Energy Analysis ^a
• Cross-Cutting Platform Capabilities
• Customer Data Access and Privacy Management
• Data-Driven Clean Energy Strategy
• DER and Renewable Integration
• DER Customer Engagement
• DER Market Expansion and Installation Efficiency
• Inclusive Energy Access and Equity
• Integrated EV and Building Electrification
• Utility and Market Operations
• Utility Rate Plan Access

^a. In previous Quarterly Reports, this theme was referred to as Whole Building Energy Analysis; the current name of this theme is reflected here.

1.5 IEDR Release Notes and Upcoming Features

As datasets, features, and functionality are developed and released on the IEDR platform, the public is encouraged to view the [IEDR Detailed Roadmap](#). Expanded details on the IEDR Detailed Roadmap, including a note describing the latest features and fixes available on the platform, can be found on the IEDR Release Notes page.

1.6 Shifting to Foundational Data Acquisition

In Q2 2025, the IEDR Program Team began working closely with Steering Committee partners to evaluate and adjust program priorities, including a shift toward acquiring foundational data that will benefit long-term use case development. Shifting the focus to acquiring foundational data, rather than developing individual use cases, is projected to improve the effectiveness of future IEDR use cases for end users. Initial data acquisition activities included evaluating and refreshing program priorities to improve activity sequencing, which will support the continued delivery of impact to stakeholders and enable progress in Phase 2. The Program Team also collaborated with the Steering Committee to reassess data acquisition activities across the program to more effectively collect usable, informative, impactful, and required data. On June 27, 2025, the IEDR Program Team and Steering Committee aligned on the program's updated approach to data acquisition and, as a result, began execution of the updated approach in Q3 2025.

2. Current Program Status

2.1 Key Program Activities

In Q1 2026, the IEDR Program Team conducted activities that support foundational data acquisition, including progressing data transfer specifications and information requests through development, review, approval, and socialization cycles. Q1 2026 development activities in support of the public launch of a query tool were also conducted, including development sprint cycles and User Acceptance Testing (UAT) preparation and initiation.

On March 24, 2026, NYSERDA filed a request for extension for the Phase 2 Status and Summary Report on or by July 1, 2026. The Phase 2 Status and Summary Report will inform the PSC's future directives regarding the IEDR Program; per the Order Approving Integrated Energy Data Resource Phase 2 Budgets, the Phase 2 Status and Summary Report ". . . shall include any information necessary to support funding and authorization for the continued future operation and maintenance of the IEDR initiative."¹¹ On March 27, 2026, the PSC approved the request for extension.

2.2 Foundational Data Acquisition

Foundational data acquisition activities within the program include drafting, review, finalization, socialization, testing, and acceptance processes for data transfer specifications, categorized by data type. Current projected data specification development work for 2026 includes the following data categories in Appendix B: network, customer, rates, building details, network load, customer programs, distributed energy resource (DER), electric vehicle supply equipment (EVSE), grid sensors, and power quality. In support of specification development, the Development Team sends information requests to the utilities to further define formal data transfer specifications by data category, as detailed in Appendix B. Responses and results from these information requests may impact future data transfer specification development and timelines. More information about potential additional future data transfer specifications will be made available in future Quarterly Reports.

Q1 2026 program activities that support the acquisition of foundational data included finalizing the review and approval of the V003 and V004 rate plan data transfer specifications and the V005 customer data transfer specification: network load, building details, and customer program

information requests were developed and shared with the UCG. The UCG provided feedback on the network load and building details information requests; the Development team incorporated the feedback into the corresponding data specification development.

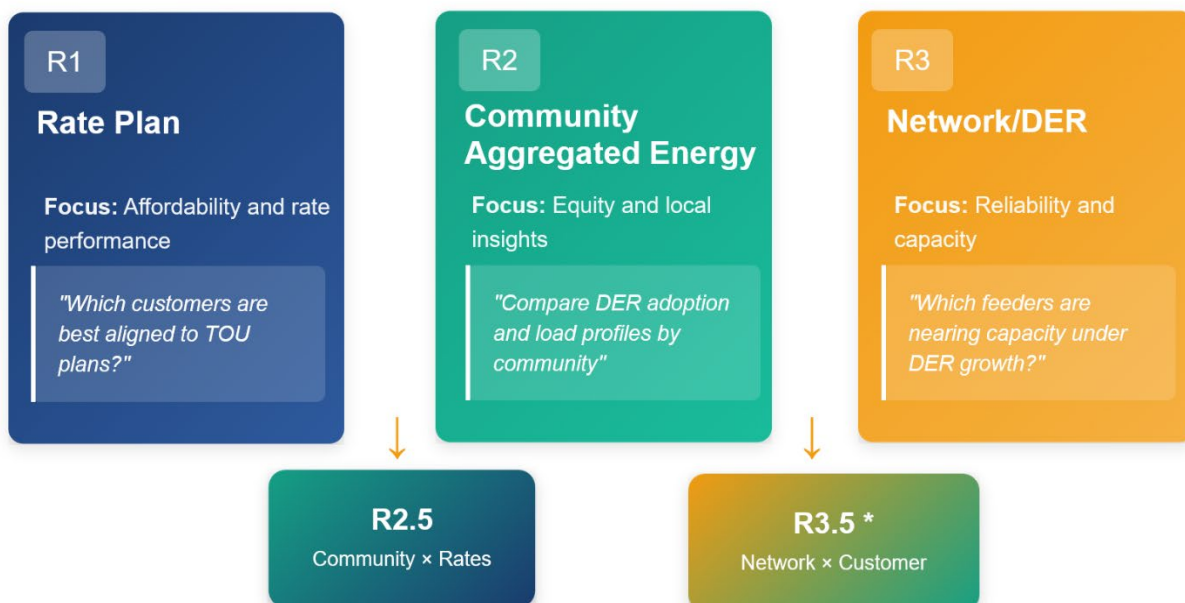
2.3 Query Tool Development

In line with PSC orders and DPS guidance, the IEDR Program Team has begun to develop an IEDR query tool. This tool is intended to allow IEDR Platform Users to search for a dataset, create a custom query, or use a pregenerated query template capable of leveraging data across foundational datasets, and explore or download the data generated from their query. Rate plan, community-aggregated energy, and network/DER are core IEDR datasets that represent the first three IEDR query tool modules scheduled for deployment. A "module" represents a primary dataset accompanied by filter, combine, review, and download capabilities. Cross-dataset joins will combine data from individual modules based on common attributes (e.g., by joining the rate plan and community-aggregated energy datasets, a user could explore which rates are active in a given location and how much energy is consumed under each rate).

Version 1.0 (V1.0) of the query tool is projected to be deployed in the second half of 2026. V1.0 will support three query modules (rates, community-aggregated energy, and network/DER) and two cross-dataset joins (community–rates and network–customer).

Figure 1. Query Tool Modules and Cross-Dataset Joins

Depicts three query modules (rate plan, community-aggregated energy, and network/DER) and two cross-dataset joins (community/rates and network/customer),



2.4 Sprint Reviews

January 2026 sprint cycles focused on improving V005 customer pipelines, validating V003 rate plan test data, improving data dashboards, and automating email messages for utility file deposits. Data quality and validation rules for V005 customer pipelines, as well as foundational work for the rates query module, were also completed. Work on the query tool home page/library view was performed, and work began on transforming data into aggregates for the query tool.

February 2026 sprint cycles focused on using V005 customer test files and V003 rate production data to improve pipelines, support query tool development, and improve automation to increase the sustainability of processes. Updates to the customer data pipelines were made, geolocation pipelines for community-energy aggregates were built in the query tool, and the first join between the rate and community modules was completed. V003 rate production data was prepared for internal UAT, and development work was performed on pregenerated rate plan queries.

March 2026 sprint cycles focused on validating and improving customer data pipelines, as well as addressing internal feedback regarding the functionality and design of the query tool user interface and user experience. Privacy screening logic was built into the query tool, and an approach for validating its functionality was also developed.

While public releases are not anticipated to resume until the second half of 2026, more details about prior releases can be found on the [IEDR Release Notes](#) page and the public view of the [IEDR Detailed Roadmap](#).

2.5 Stakeholder Engagement Status

In Q1 2026, the Program Team prepared for UAT of the query tool, socialized UAT plans with the Steering Committee, and conducted a preliminary round of UAT focused on the rate plan query tool module with the IEDR Steering Committee and DPS Staff. Additional UAT with the Steering Committee for the community-aggregated energy and network/DER modules is planned for Q2 2026.

2.6 Utility Coordination Group

As established by the IEDR Order, NYSERDA regularly convened with the UCG throughout Phase 2 of the program. The UCG provides a venue for collaboration, coordination, and

oversight of utility activities related to the design and implementation of the IEDR, and for alignment with the schedules and activities of the DAF. The UCG is composed of members of the Steering Committee or their designees, NYSERDA, the Program Manager, and the senior-level leader of each utility IEDR Implementation Team, as required in the IEDR Order. Beginning in Q4 2022, the UCG meeting engagement schedule was structured to include 30- to 60-minute biweekly UCG meetings, followed up by targeted meetings with individual utilities and specific subject matter experts (SMEs).

The updated data acquisition approach included the formation of UCG subcommittees, as permitted by the IEDR Program Charter. The UCG subcommittees are specialized committees established to address specific topics, including utility data acquisition and integration. These subcommittees are designed to facilitate focused discussions, resolve technical challenges, and coordinate efforts among utility stakeholders to support the efficient and accurate collection of data required for the IEDR platform. The formation of these subcommittees has helped streamline data acquisition and support program goals.

Q1 2026 UCG engagement included primary UCG meetings with the Joint Utilities of New York (JU), which has shifted to monthly from biweekly, and three Rate Plan, three Customer, and three Network UCG subcommittee meetings, which now occur between primary monthly UCG meetings.

2.6.1 Record of Monthly IEDR Utility Coordination Group Meetings as of March 31, 2026

Utility Coordination Group Meeting | January 20, 2026

Agenda topics at this UCG included a review of the Phase 2 data acquisition roadmap and an introduction to information requests to address gaps between the current data transfer specifications and the data fields outlined in Appendix B of the IEDR whitepaper.

Utility Coordination Group Meeting | February 10, 2026

Agenda topics at this UCG included a review of the UCG Subcommittee Documentation V1.1.0, requests for building details and network load information, and the draft V004 rate plan data transfer specification. The query tool was also introduced.

Utility Coordination Group Meeting | March 10, 2026

Agenda topics at this UCG included a review of findings from the network load and building stock information requests, along with new DER and customer programs requests.

3. Use and Status of Funding

The IEDR Phase 2 Order established a budget of \$36,386,193 for NYSERDA’s Phase 2 efforts. The Phase 2 Order directed the recovery of these costs in proportion to the total electric load for 2022 among Long Island Power Authority (LIPA) and jurisdictional utilities, with the costs allocated among jurisdictional utilities in the same manner as costs allocated and collected through the Bill-As-You-Go Agreements. Based on the load values provided by the IEDR Phase 2 Order, costs will be allocated as detailed in Table 3.¹²

On October 31, 2024, the JU filed a petition¹³ (Petition) seeking clarification on the PSC’s IEDR Phase 2 Order.¹⁴ On December 20, 2024, in response to the Petition, the PSC issued the Order Clarifying Integrated Energy Data Resource Phase 2 Cost Collections.¹⁵

Table 3. IEDR Phase 2 Cost Allocation

Utility	2022 Annual Delivery Service Load (MWh)	MWh Load Ratio Share
Central Hudson	5,038,524	3.7%
Con Edison	53,290,877	38.6%
NYSEG	16,170,214	11.7%
National Grid	33,248,701	24.1%
O&R	4,211,186	3.1%
RG&E	7,271,949	5.3%
LIPA	18,743,000	13.6%
Total	137,974,451	100.0%

Table 4 summarizes the approved budget and cumulative activity through March 31, 2026.

Table 4. IEDR Cumulative Budget Allocation for Phase 2 through March 31, 2026

Integrated Energy Data Resources (a)(b)
Approved Budget and Itemized Expenses
March 31, 2026

Table 1: Cumulative Activity through March 31, 2026

	Cumulative Approved Budget	Expended (c)	Encumbered (d)	Expended + Encumbered	Expended + Encumbered as a % of Total Budget	Pre-encumbered Contracts (e)	Pre-encumbered Solicitations (e)	Expended + Encumbered + Pre-encumbered	Expended + Encumbered + Pre-encumbered as a % of Total Budget	Uncommitted
Phase 1 + Phase 2	4,791,442	2,678,055	221,760	2,899,815	60.5%	-	-	2,899,815	60.5%	1,891,627
Administration Costs as Project Sponsor	45,094,750	32,156,132	9,925,373	42,081,505	93.3%	-	-	42,081,505	93.3%	3,013,245
Procured Resources	49,886,192	34,834,187	10,147,133	44,981,320	90.2%	-	-	44,981,320	90.2%	4,904,872
Total										

(a) Case 20-M-0082: Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data. Order Implementing an Integrated Energy Data Resource, issued and effective February 11, 2021.
(a) Case 20-M-0082: Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data. Order Approving Integrated Energy Data Resource Phase 2 Budgets, issued and effective January 19, 2024.
(c) Expended funds include contractor invoices processed for payment by NYSERDA.
(d) Encumbered funds include remaining funds obligated under a contract or purchase order.
(e) Pre-Encumbered funds include planned funding for contracts awarded and under negotiation; and planned funding under active development through open solicitations with upcoming proposal due dates.

All IEDR Program–related expenditures are and will be managed by the Program Sponsor in compliance with NYSERDA’s budget and accounting policies and principles. For a full overview of the projected costs of the IEDR, please refer to the Updated Program Sponsor Implementation Plan (PSIP)¹⁶ and IEDR Phase 2 Order.¹⁷

4. Program Plans for 2026

Program plans for 2026 include continuing to focus on foundation data acquisition, which entails data specification development, review, and socialization, receiving data deposits from the utilities, processing that data for integration into the platform, and quality assurance and user acceptance testing of data and query tool functionality that is accessible from the platform. The first public release of the query tool, which will allow platform users to query information across foundational datasets, is currently projected for the second half of 2026. On or before July 1, 2026, NYSERDA will file the IEDR Phase 2 Status and Summary Report.

5. Program Risk Assessment and Mitigation Plan

As stated in the PSIP and as outlined in Section 5.5 of the IEDR whitepaper:

The Program Manager will organize and conduct the activities—including regular consultations with NYSERDA—needed to facilitate the timely anticipation, identification, and mitigation of risks that could hinder or prevent successful IEDR implementation and provide the approach to enable NYSERDA to provide timely communication of risks with the Steering Committee.¹⁸

With the commencement of Phase 1, a comprehensive risk assessment and mitigation plan with extensive tracking began and will remain in effect throughout Phase 2 of program operations. The Program Manager actively coordinates with all external partners to identify and mitigate risks in accordance with the Risk Management Plan. Currently, no “high” severity risks have been identified.

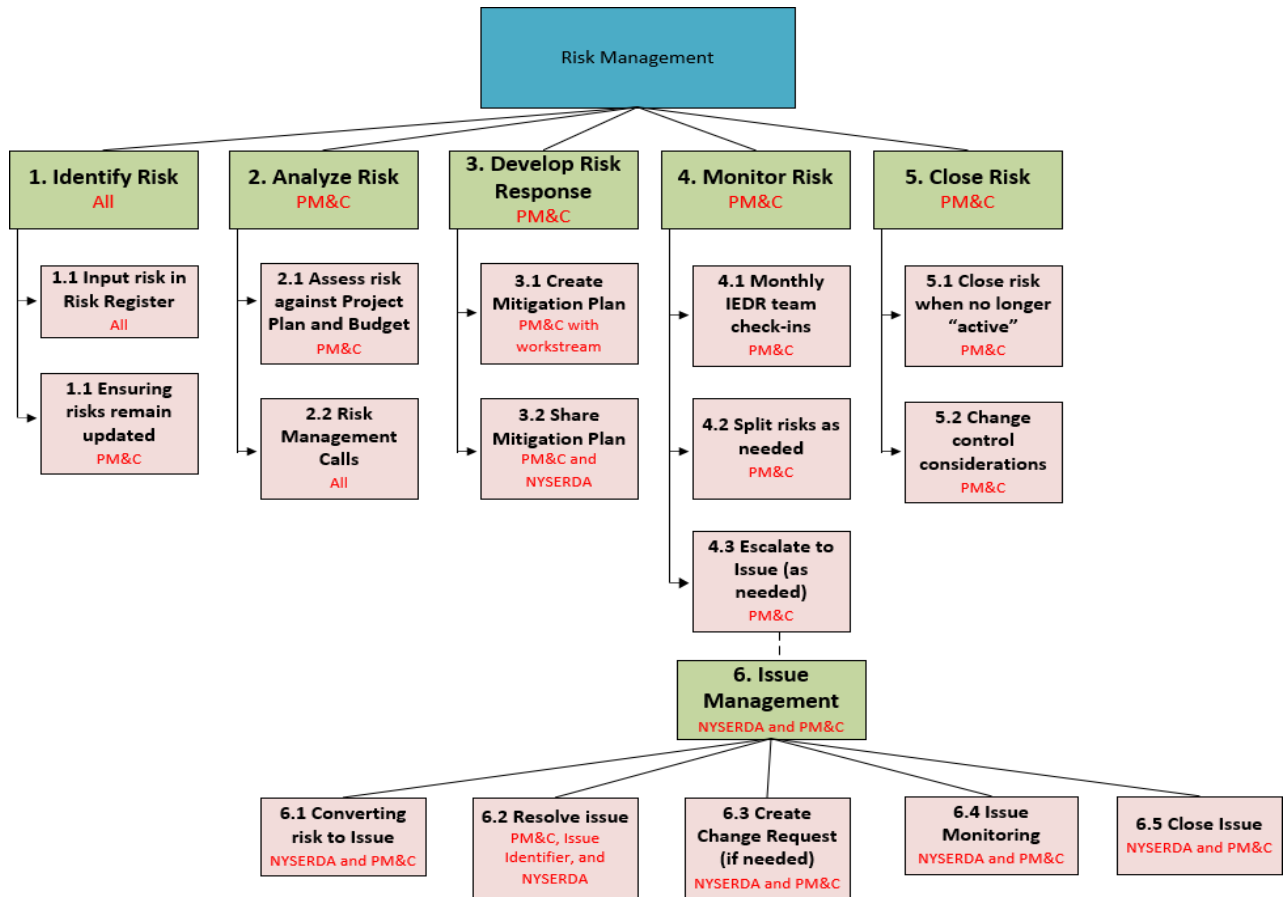
Table 5 provides an overview of the high IEDR program risks identified as of March 31, 2026.

Table 5. IEDR Program Risks as of March 31, 2026

Risk Description	Impact Areas	Risk Severity	Mitigation Approach
N/A	N/A	N/A	N/A

Figure 2 provides an overview of the Risk Management Plan. Within the context of Figure 1, PM&C is defined as Program Management and Control, as performed by the Program Manager.

Figure 2. IEDR Risk Management Plan Overview



Appendix A. Completed Milestones to Date

Table A-1. Completed Milestones as of March 31, 2026

Milestone	Program Topic	Date Completed
Program Manager RFP response submission deadline.	Program Manager	July 1, 2021
Program Charter adopted by UCC.	Charter	July 12, 2021
Initial use case comments from stakeholder response deadline.	Stakeholder Engagement	July 23, 2021
Program Charter adopted by IEDR Steering Committee.	Charter	August 6, 2021
Initial meeting of the AG.	Advisory Group	August 17, 2021
Program Manager contract executed and work commenced.	Program Manager	September 28, 2021
Utility Data Advisor contract executed and work commenced.	Utility Data Advisor	September 30, 2021
Updated PSIP filed.	Reporting	October 1, 2021
IEDR Program Dashboard operational.	Reporting	October 31, 2021
First Quarterly Report filed.	Reporting	October 21, 2021
Program Charter to be adopted by AG.	Charter	October 21, 2021
General stakeholder engagement meeting (virtual use case stakeholder event).	Stakeholder Engagement	November 15, 2021
Stakeholder engagement and Communication Plan drafted and finalized.	Stakeholder Engagement	October 29, 2021
Outreach to organizations that submitted use cases and may be aligned with prioritized use cases.	Stakeholder Engagement	Started Q4 2021, as anticipated
Use case interviews to assist in user story and user journey development.	Stakeholder Engagement	Started Q4 2021, as anticipated
Workshops/focus groups for each use case to validate user stories and user journeys.	Stakeholder Engagement	Started Q4 2021, as anticipated
Develop draft procurement documentation for IEDR Development Team.	Solution Architect + Development RFP	December 31, 2021
IEDR Utility Data Assessment completed.	Utility Coordination Group	December 2021
Issue RFP for Solution Architect + Development Contractor teaming arrangement and related services.	Solution Architect + Development RFP	March 25, 2022
Contract with Solution Architect + Development Team executed, and work commences.	Solution Architect + Development RFP	Q4 2022—deviation, originally anticipated Q2 2022
Sprint cycles focused on converting user stories/journeys for 3–5 use cases into functional IEDR prototypes.	Public Iterations of IEDR	Q1 2023—deviation, originally anticipated Q4 2022
Final round of data access/security review and User Acceptance Testing of the IEDR's first public iteration.	Public Iterations of IEDR	Q1 2023—deviation, originally anticipated Q4 2022
First public iteration of the IEDR released.	Public Iterations of IEDR	Q1 2023—deviation, originally anticipated Q4 2022
Phase 2 proposal filed.	Reporting	May 12, 2023—deviation, originally anticipated January 15, 2023
Sprint cycles focused on converting user stories/journeys for an additional 2–5 use cases into functional IEDR prototypes.	Public Iterations of IEDR	Q4 2023
Steering Committee reviews and approves declaration of IEDR MVP	Public Iterations of the IEDR	February 2024—deviation, originally anticipated Q4 2023
IEDR MVP declared (5–10 use cases deployed) and end of Phase 1	Public Iterations of the IEDR	March 27, 2024—deviation, originally anticipated Q4 2023

Endnotes

- ¹ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, Issued and Effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>.
- ² Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Whitepaper Recommendation to Implement an Integrated Energy Data Resource, May 29, 2020. <http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={43298F6A-3CA4-435F-BC9D-6DEF6F575836}>.
- ³ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, Issued and Effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>.
- ⁴ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Adopting a Data Access Framework and Establishing Further Process, issued and effective April 15, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}>.
- ⁵ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Staff Whitepaper Regarding a Data Access Framework, May 29, 2020. <http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={43298F6A-3CA4-435F-BC9D-6DEF6F575836}>.
- ⁶ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Implementing an Integrated Energy Data Resource, issued and effective February 11, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={3CDC0522-7F50-49E1-A053-EA236B3DED10}>.
- ⁷ Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, January 18, 2024, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1D-C44A88B299F0}>.
- ⁸ NYSERDA IEDR Ideas Portal: <https://iedr.ideas.aha.io/sections/7216419530855529789>.
- ⁹ Case 20-M-0082, Integrated Energy Data Resource (IEDR) Program Phase 2 Proposal, Filed May 12, 2023, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId=%7b409A1188-0000-C633-8139-1F4115003AC9%7d>.
- ¹⁰ Proposed IEDR Aggregated Phase 2 Use Case Summaries: <https://www.nyserdera.ny.gov/-/media/Project/Nyserda/Files/Programs/IEDR/Draft-Phase-2-Use-Cases.pdf>.
- ¹¹ Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, January 18, 2024, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1D-C44A88B299F0}>.
- ¹² These numbers differ from those originally published in the Integrated Energy Data Resource Initial Program Sponsor Implementation Plan. The update reflected here and in the updated Program Sponsor Implementation Plan disaggregates NYPA load from the investor-owned utilities' load and presents the adjusted Bill-As-You-Go allocation. Phase 2 implementation is subject to the commission's adoption of the Phase 2 Proposal.

- ¹³ Case 20-M-0082, Proceeding on Motion of the Commission regarding Strategic Use of Energy Data, JU IEDR Phase 2 Cost Recovery Petition, Filed October 31, 2024, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={203DE492-0000-C92D-A7FF-B75E3F7B512B}>).
- ¹⁴ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy-related Data, Order Approving Integrated Energy Data Resource Phase 2 Budgets, Issued and Effective January 19, 2024, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1D-C44A88B299F0}>).
- ¹⁵ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Order Adopting a Data Access Framework and Establishing Further Process, Issued and Effective April 15, 2021, <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={A228D385-3E0E-41BC-A433-8ABD62F8A6E4}>).
- ¹⁶ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Integrated Energy Data Resource Updated Program Sponsor Implementation Plan, Issued and Effective October 1, 2021. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={B9BC09C2-F8F1-43B4-8CF5-D90C10C6AD2C}>).
- ¹⁷ Case 20-M-0082, Order Approving Integrated Energy Data Resource Phase 2 Budgets, Issued and Effective January 19, 2024. <https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={C0B6228D-0000-C413-AA1DC44A88B299F0}>).
- ¹⁸ Case 20-M-0082, Proceeding on Motion of the Commission Regarding Strategic Use of Energy Related Data, Department of Public Service Whitepaper Recommendation to Implement an Integrated Energy Data Resource, May 29, 2020. <http://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRetId={43298F6A-3CA4-435F-BC9D-6DEF6F575836}>).

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