# Integrated Energy Data Resource (IEDR) Program Quarterly Report through September 30, 2026

Final Report | October 2026

NEW YORK STATE
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New York State Energy Research and Development Authority

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

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# NYSERDA Record of Revision

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# Integrated Energy Data Resource (IEDR) Program Quarterly Report through September 30, 2026

***Final Report***

Prepared by:

**New York State Energy Research and Development Authority**

Albany, NY

October 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 additional 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 |
| DMM | Document and Matter Management |
| DPS | New York State Department of Public Service |
| EVSE | electric vehicle supply equipment |
| 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 |
| QA | quality assurance |
| QC | quality control |
| RFP | request for proposals |
| RG&E | Rochester Gas and Electric Corporation |
| SMEs | subject matter experts |
| UAT | user acceptance testing |
| 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 NYSERDA 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.

## 1.1 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.

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.

## 1.2 Phase 2 Milestones

Initial Phase 2 planning projections account for two Phase 2 program milestones. The IEDR Phase 2 Order[3] established one additional IEDR program milestone, the Phase 2 Status and Summary Report milestone, which was anticipated to be filed on or before September 29, 2026. The previous Phase 1 program milestone, Platform User Conference, was determined to be better 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 September 29, 2026 | Complete |
| Platform User Conference | Stakeholder Engagement | TBD | Not Started |

## 1.3 Phase 2 Prioritization

Anticipating potential shifts in the use case development roadmap, the Phase 2 Order stipulated that "...use cases may be updated, deferred, split into multiple use cases, or otherwise modified or removed in the final roadmap as a result of data availability, evolving stakeholder needs, the identification of higher priority use cases, or unforeseen shifts in the market." Consistent with the potential shifts in the use case roadmap envisioned by the Order, it became evident that continuing to develop isolated use cases without first addressing foundational issues with data acquisition would result in duplicated efforts, increased data inconsistencies, limitations in long-term platform scalability, and ultimately allowed known data acquisition challenges to prevail.

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 would 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 implementing it in Q3 2025.

While the shift toward foundational data acquisition and standardization established the common infrastructure needed to support current and future use cases more effectively and efficiently, the shift also re-sequenced the program's ability to fully deploy the initially envisioned catalogue of use cases. As a result, progress has been made in acquiring foundational data that is essential to the initial catalogue of stakeholder use cases, however, only a portion of the original catalogue of use cases will be deployed within Phase 2. Additional detail about data acquisition and use case accounting can be seen in the IEDR Phase 2 Status and Summary Report, filed on the DMM system.

## 1.4 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, which was 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 they may experience while navigating the platform.

## 1.5 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.

## 1.6 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.

# 2. Current Program Status

## 2.1 Key Program Activities

Key program activities in Q3 2026 included advancing the Electric Vehicle Supply Equipment (EVSE) and V001 Power Quality/Grid Sensors data specifications through internal program review cycles, making enhancements to the Query Tool in response to feedback from internal User Acceptance Testing (UAT) for the Community Scale Energy Module, conducting internal UAT for the Rates and Community Query Tool Module, and progressing the Phase 2 Status and Summary Report through preliminary reviews.

The Phase 2 Status and Summary Report was filed on September 29, 2026, and[4] "shall include any information necessary to support funding and authorization for the continued future operation and maintenance of the IEDR initiative."

## 2.2 Foundational Data Acquisition

Foundational data acquisition activities within the program include drafting, reviewing, finalizing, socializing, testing, and accepting data transfer specifications, categorized by data type. Current projected data specification development work for 2026 includes the following Appendix B data categories: Network, Customer, Rate Plan, Distributed Energy Resource (DER), EVSE, and Power Quality/Grid Sensors. To support specification development, the Development Team sends information requests to the utilities to help further define data transfer specifications based on Appendix B data categories. Information requests sent to and returned from the utilities 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.

Q3 2026 program activities that support the acquisition of foundational data included conducting rate plan network, and DER subcommittee meetings. Utility Coordination Group (UCG) Subcommittee discussions included rate plan statement tables updates, and DER interval data updates. Program activities also included sharing the V001 Power Quality/Grid Sensors data transfer specification with the UCG and granting the UCG access to the IEDR staging environment to explore the Query Tool.

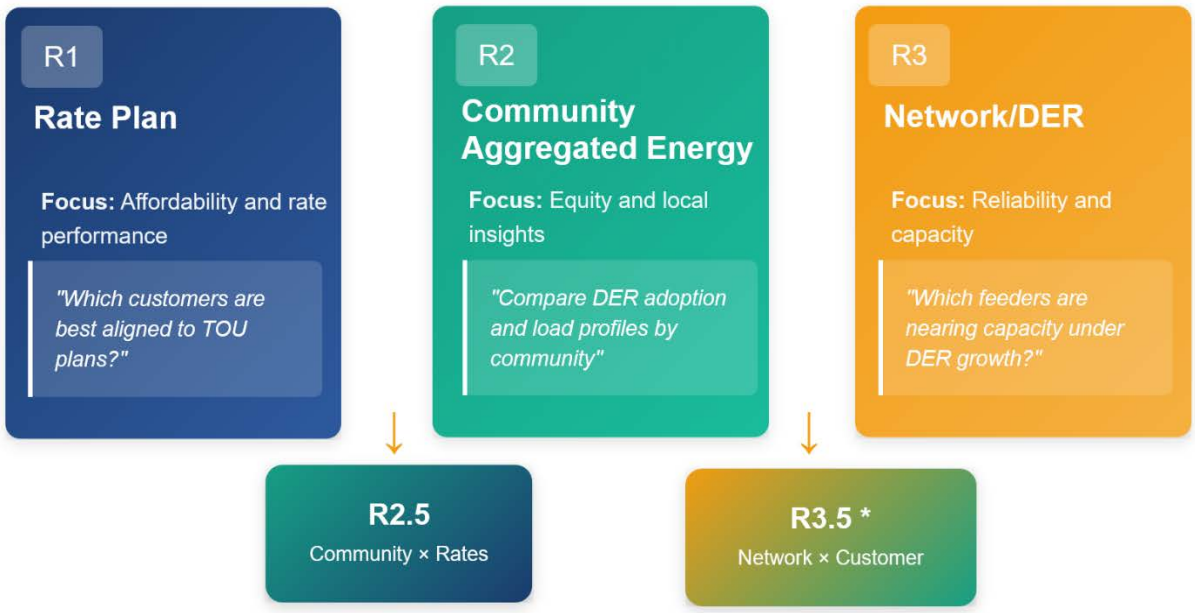
## 2.3 Query Tool Development

In line with Commission Orders and DPS guidance, the IEDR Program Team has begun development of 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 pre-generated query template that leverages data from foundational datasets, and to explore or download the data generated from their query. Rate plan, community-aggregated energy, and network/DER are core IEDR datasets that comprise the first three modules of the IEDR Query Tool 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 geographic location and how much energy is being consumed per rate).

Release of Version 1.0 (V1.0) of the Query Tool was previously projected to take place in Q4 2026. In coordination with the IEDR UCG and Steering Committee, original timeline projections have since evolved to accommodate coordination and development requirements; the Query Tool is now expected to publicly launch in Q1 2027, before the end of Phase 2. V1.0 of the Query Tool will facilitate access to three individual query modules (Rate Plan, Community Aggregated Energy, and Network/DER), as well as two cross-dataset joins (Community Aggregated Energy and Rate Plan, and Network and Customer dataset joins).

In Q3 2026, the IEDR Program Team conducted internal Query Tool UAT for the rates and Community Query Tool module, while continuing to prepare for future internal UAT sessions. External UAT, which will test all modules with a group of external stakeholders is projected to take place in Q1 2027, prior to full public release of the Query Tool in Q1 2027.

**Figure 1. Rate Plan, Community Aggregated Energy, Network/DER Query Tool Modules, and the Community and Rates, and Network and Customer Joins**




## 2.4 Sprint Reviews

Q3 2026 sprints included Query Tool enhancements and bug fixes, processing Customer V005 data deposits and quality assurance/quality control (QA/QC) checks. Compressed data handling was enabled across utilities to support pipeline processing, production data for the V004 Rate Plan specification was received and common data pipelines were leveraged to accelerate development for DER data. Data quality issues were also identified in data deposit files; the team worked with utilities to mitigate the issues and resubmit corrected data. Historical data assessment was also performed, as well as community energy geolocation matching.
Q3 2026 sprints also included Query Tool enhancements including updates to the Rate Plan and Network query module. Data engineering updates included implementing joins, and resolving issues identified during the dataset integration process, as well as validating mapping for the Community X Rates query module. Customer and rate plan data continues to be ingested and is processed to be fit for use in the Query Tool. DER data dashboards were tested to ensure the DER data is accurate, usable, and properly represented.

## 2.5 Stakeholder Engagement Status

In Q3 2026, the Program Team prepared for internal and external Query Tool UAT, and on July 14, 2026, initiated a round of internal UAT focused on the Rates X Community Query Tool module with the IEDR Steering Committee and DPS Staff. Additional UAT with the Steering Committee and DPS Staff for the Network/DER Module is planned for early Q1 2027. Currently, external stakeholder UAT (which will test all Query Tool modules) is expected to commence after internal UAT concludes in Q1 2027 and conclude prior to the end of Phase 2.

## 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, as well as alignment with the schedules and activities of the Data Access Framework (DAF). The UCG is composed of members of the Steering Committee or their designees, NYSERDA, the Program Manager, and the senior 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.

Q3 2026 UCG engagement included primary UCG meetings with the Joint Utilities of New York (JU) and Public Service Enterprise Group Long Island (PSEG LI), which have shifted to monthly from biweekly, and Rate Plan, Customer, and 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 September 30, 2026

**Utility Coordination Group Meeting | July 7, 2026**

During this UCG meeting, the IEDR Program Team reviewed JU-requested discussion topics, including an update on the status of community-scale energy usage data reporting, and the DAF. Time was reserved for open discussion and a review of the proposed agenda for the next UCG meeting.

**Utility Coordination Group Meeting | August 11, 2026**

During this UCG meeting, the IEDR Program Team provided an update on the Phase 2 Status and Summary Report and reviewed the draft V001 Power Quality/Grid Sensor data transfer specification. Time was reserved for open discussion and to review the proposed agenda for the next UCG meeting.

**Utility Coordination Group Meeting | September 8, 2026**

During this UCG meeting, the IEDR Program Team provided a demonstration of the IEDR Query Tool and offered UCG participants access to the IEDR staging environment for optional review. Time was reserved for open discussion and to review the proposed agenda for the next UCG meeting.

# 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 in the IEDR Phase 2 Order, costs will be allocated according to the apportionment detailed in Table 3.[5]

On October 31, 2024, the JU filed a petition[6] (Petition) seeking clarification on the PSC's IEDR Phase 2 Order.[7] On December 20, 2024, in response to the Petition, the PSC issued the Order Clarifying Integrated Energy Data Resource Phase 2 Cost Collections.[8]

**Table 2. 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 3. IEDR Cumulative Budget Allocation for Phase 2 through September 30, 2026**

Integrated Energy Data Resources (a)(b)
Approved Budget and Itemized Expenses
September 30, 2026

**Table 1: Cumulative Activity through September 30, 2026**

| Phase 1 + Phase 2 | 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 |
|---|---|---|---|---|---|---|---|---|---|---|
| Administration Costs as Project Sponsor | 4,791,442 | 3,068,974 | 221,760 | 3,290,734 | 68.7% | - | - | 3,290,734 | 68.7% | 1,500,708 |
| Procured Resources | 45,094,750 | 37,605,199 | 4,986,829 | 42,592,029 | 94.5% | - | - | 42,592,029 | 94.5% | 2,502,721 |
| Total | 49,886,192 | 40,674,173 | 5,208,589 | 45,882,763 | 92.0% | - | - | 45,882,763 | 92.0% | 4,003,429 |

(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)[9] and IEDR Phase 2 Order.[10]

# 4. Program Plans for 2026

Program plans for the remainder of 2026 include continuing to support foundational data acquisition activities and processes, preparing to conduct internal UAT for the Network and DER query module in Q1 2027, and preparing for external UAT for the full suite of Query Tool modules in Q1 2027 in advance of the anticipated launch of the Query Tool by the end of Q1 2027. Program plans also include monitoring for Commission action on the IEDR Phase 2 Status and Summary Report and IEDR User Agreements, that when approved will enable IEDR Query Tool public access.

# 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.[11]

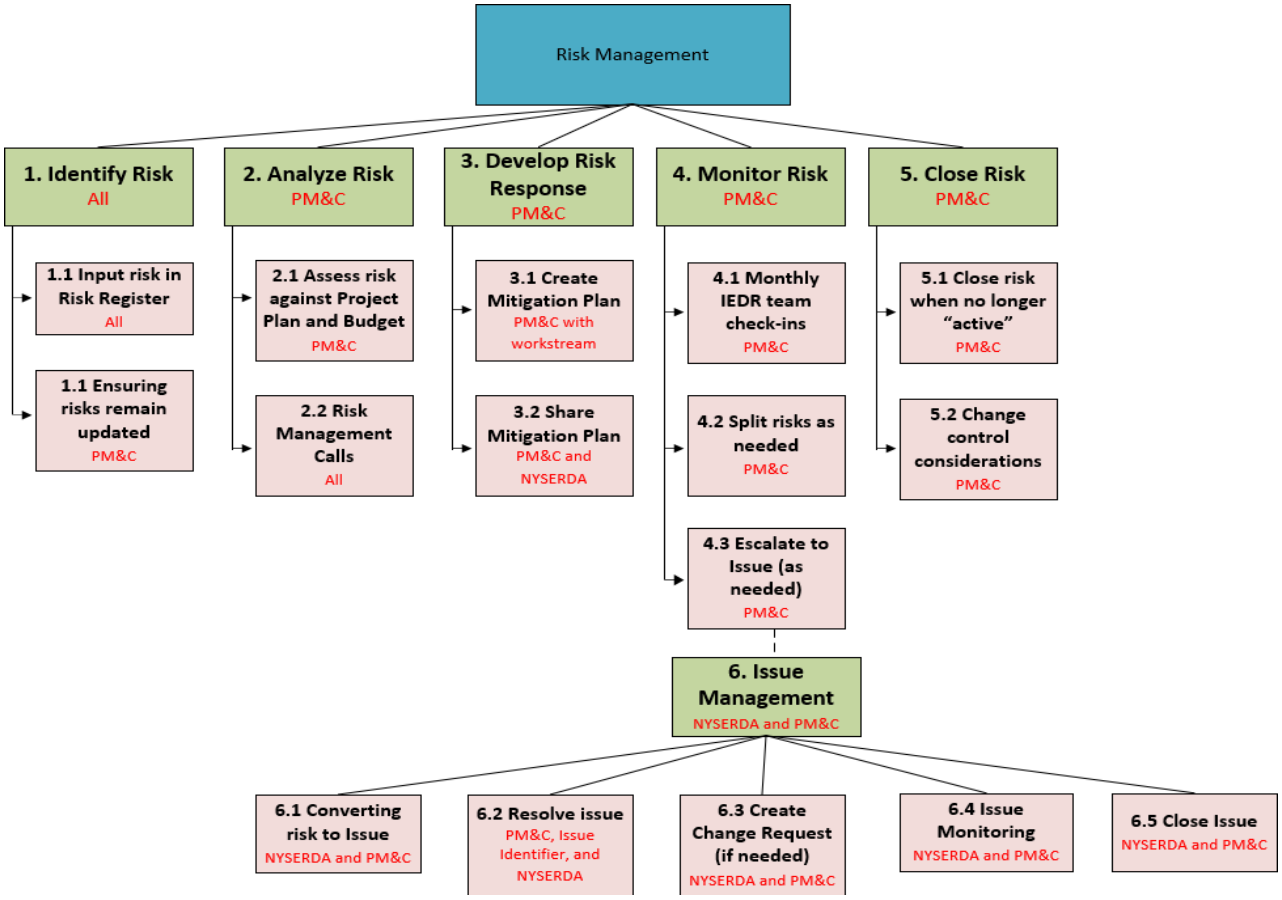
With the commencement of Phase 1, a comprehensive risk assessment and mitigation plan with extensive tracking began and will remain in effect throughout Phase 2 of program operations. The Program Manager actively coordinates with all external partners to identify and mitigate risks in accordance with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

**Table 4. IEDR Program Risks as of September 30, 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 September 30, 2026**

| Milestone | Program Topic | Date Completed |
|---|---|---|
| Program Manager RFP response submission deadline. | Program Manager | July 1, 2021 |
| Program Charter adopted by UCG. | 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 |

**Table A-1. (continued)**

| Milestone | Program Topic | Date Completed |
|---|---|---|
| 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 IEDR | February 2024—deviation, originally anticipated Q4 2023 |
| IEDR MVP declared (5–10 use cases deployed) and end of Phase 1. | Public Iterations of IEDR | March 27, 2024—deviation, originally anticipated Q4 2023 |
| File Phase 2 Status and Summary Report. | Reporting | Filed September 29, 2026 |
| Launch V1.0 of the Query Tool. | Public Iterations of IEDR | Anticipated Q1 2027 |

# 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/YiewDoc.aspx?DocRetId={43298F6A-3CA4-435F-BC9D- 6DEF6F575836}

[3] 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}

[4] State of New York Department of Public Service (DPS), "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. January 19, 2024: 20.

[5] 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 New York Power Authority (NYPA) load from the investor-owned utilities' loads and presents the adjusted Bill-As-You-Go allocation. Phase 2 implementation is subject to the commission's adoption of the Phase 2 Proposal.

[6] 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}

[7] 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}

[8] 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}

[9] 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}

[10] 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}

[11] 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/YiewDoc.aspx?DocRetId={43298F6A-3CA4-435F-BC9D- 6DEF6F575836}

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