



# Preparing for the Competitive Window

A Guide for PJM Stakeholders

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Engineer I , Transmissions Planning

- What is the Competitive Planner Tool?
  - <https://www.pjm.com/planning/competitive-planning-process>
- How do you access the tool?
  - <https://pjm.com/-/media/etools/account-manager/single-user-multi-account-quick-start-guide.ashx?la=en>

Beginning in July 2020, all RTEP competitive proposals will be submitted through a new web-based Competitive Planner tool. Only transmission owners and developers who have received authorization to receive Critical Energy Infrastructure Information (CEII) associated with the current window will be able to participate in the PJM competitive planning process.

[Request Access to Competitive Planner](#) 

Roles	Description
Competitive Planner Read Only	Can only read existing proposals. Cannot start, edit or submit proposals
Competitive Planner Read Write	Can start, edit or view proposals. Cannot submit proposals
Competitive Planner Submitter	Can start, edit, view, and submit proposals
SUMA accounts	Any combination of above three roles (one permitted per company)

## Competitive Planner

Pre-Qualified Expires on 07.24.2022 [Start New Proposal](#)

[Homepage](#) Existing Proposals

**OPEN** Proposal Window 2020 Long Term

Long-Term proposals - submitted to solve of mitigate considers reliability criteria violations, economic constraints, system conditions and public policy requirements.

Proposals in progress	2
Proposals ready for submission	0
Total cost	\$0 M
Total proposal fees	\$0

[Continue an Existing Proposal](#) [Start New Proposal](#)

**OPEN** Proposal Window 2020 Short Term

Short-Term proposals will be considered to solve of mitigate reliability criteria violations included in the Problem Statement below.

Proposals in progress	2
Proposals ready for submission	1
Total cost	\$1,598.15 M
Total proposal fees	\$0

[Continue an Existing Proposal](#) [Start New Proposal](#)

**CLOSED** Proposal Window 2017 Short Term

Short-Term proposals will be considered to solve of mitigate reliability criteria violations included in the Problem Statement below.

Proposals in progress	0
Proposals submitted	0
Total cost	\$0 M
Total proposal fees	\$0

**CLOSED** Proposal Window 2019 Long Term

Long-Term proposals - submitted to solve of mitigate considers reliability criteria violations, economic constraints, system conditions and public policy requirements.

Proposals in progress	0
Proposals submitted	0
Total cost	\$0 M
Total proposal fees	\$0

- An entity's eligibility to be designated to construct a project is evaluated based on its technical and engineering qualifications, including its ability to develop, construct, operate and maintain transmission within the PJM region.
- Any entity can submit a proposal regardless of Pre-Qualified status, but must be pre-qualified pursuant to OA Schedule 6, section 1.5.8 in order to be designated construction responsibility.
- For more information, please see Manual 14F and the competitive planning page.

<https://pjm.com/-/media/documents/manuals/m14f.ashx>

<https://www.pjm.com/planning/competitive-planning-process/pre-qualification>

Homepage Existing Proposals **Proposal Form**

**General Information**

Overloaded Facilities

Project Components

Financial Information

Cost Containment Commitment

Review

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**General Information** Saved as Draft

Proposing entity name \* 1 PJMTST Joint Proposals 10

Company proposal ID \* 2 PJMTST-01

Project title \* 3 New X/Y Line

Project description \* 4  
Project is a new line between X and Y substations utilizing AAA structures.

Project in-service date \* 5 01/2021

Tie-line impact \* 6  
 Yes  No

Interregional project \* 7  
 Yes  No

Is the proposer offering a binding cap on capital costs? \* 8  
 Yes  No

Additional benefits \* 9  
For example: reliability, economics, etc.

**Supporting Documents** 11  
*To submit multiple files at once, please place them into a Zip file before uploading.*

Project analysis attachments \*   
*IDEV, XML, etc. file types*

Market efficiency simulation modeling files \*   
*IDEV, XML, etc. file types*

**Project Cost Summary**

Cost estimate (current year)	\$1.598 M
Cost estimate (in-service year)	\$0.007 M
Project in-service date	1.2021

**Proposal Window 2020 Short Term**

Company Proposal ID	PJMTST-01
PJM Proposal ID	541

1. Proposing Entity Name (This cannot be changed by the user. This is based on the user's account and the company it is tied with.)
2. Company Proposal ID is provided by the user to allow the company to track and identify their submittals
3. Project Title (**Do not use your Company Name or any CEII Material in the Title**)
4. Project Description that gives a general scope of the project
5. Projected In-service Date
6. Tie-Line Impact (Please check this if the proposal or a component of the proposal span two PJM Transmission Owner Zones)
7. Interregional Project (Please check if this project is being proposed as a solution to a cross-border issue e.g. PJM to MISO)

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**Proposal Window 2020 Short Term**

Company Proposal ID	PJMTST-01
PJM Proposal ID	541

8. Indicate if any Cost Containment Commitment is being proposed, if yes a detailed description is required under the *Cost Containment Commitment* heading
9. Please identify any additional benefits to the projects (e.g. Solving more violations, reliability, economic, resilience, etc.)
10. Joint Proposal, if your project falls under this, one party **must** be the contact with PJM and the joint parties will determine the Joint Proposal ID

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Project Cost Summary

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Proposal Window 2020 Short Term

Company Proposal ID	PJMTST-01
PJM Proposal ID	541

**General Information**

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For example: reliability, economics, etc.

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Project analysis attachments \*  
IDEV, XML, etc. file types + Choose File

Market efficiency simulation modeling files \*  
IDEV, XML, etc. file types + Choose File

Saved as Draft

## 11. Supporting Documents

Reminder, please identify each file with a unique identifier. Do not label these files with the same name. Please bundle these into one ZIP file if there are multiple files being posted at once.

**The information must be organized in the ZIP folders for Project Analysis Files and Market Efficiency Technical Files as separate ZIP folders as listed below:**

- Project Analysis Files
  - Powerflow files (.Idv, .Raw, .Sav)
  - Short Circuit Files (.Chf, .Dxt)
  - Contingency Changes (Include all new, modified, and removed)
  - One Line Diagrams (Before and After)
- Market Efficiency Technical Files
  - Any Promod file (Eve, Xml, Lib, Dat, Pff, Promod Simulation Results)
  - BC Ratios in Excel Format
  - Powerflow files (.Idv, .Raw, .Sav)

## Competitive Planner

Homepage Existing Proposals **Proposal Form**

General Information

**Overloaded Facilities**

Project Components

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### Overloaded Facilities or Congestion Drivers

Congestion Drivers
Existing Flowgates
New Flowgates

Select a checkbox next to each facility that will be addressed by the proposed project.

View selected congestion drivers only (2) Saved & Validated ✓

<input type="checkbox"/>	CD #	Analysis type	From Bus No.	From Bus Name	To Bus No.	To Bus Name	CKT	Voltage	TO Zone
	<input type="text"/>	Select ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▾	Select ▾	Select ▾
<input type="checkbox"/>	ME-567	Summer N1 Volt Low	360339	Another Bus Name	342812	SSUMM SHAD T	3	162/161	PECO
<input checked="" type="checkbox"/>	ME-565	Winter N1 Volt High	360337	ABC name4	342813	SSUMM SHAD T	1	161/161	PG&E
<input type="checkbox"/>	ME-569	Summer N1 Thermal	360341	ABC name1	342812	SSUMM SHAD T	2	161/161	PPL
<input checked="" type="checkbox"/>	ME-564	Summer N1 Thermal	360336	ABC name3	342812	SSUMM SHAD T	2	161/161	PPL
<input type="checkbox"/>	ME-568	Summer N1 Volt Low	360340	ABC name6	342812	SSUMM SHAD T	3	162/161	PPL

Records per page: 50 ▾ (1 of 1) << >>

5 Records

Save as Draft Save & Validate

**Project Cost Summary**

Cost estimate (current year) \$1.598 M

Cost estimate (in-service year) \$0.007 M

Project in-service date 1.2021

**Proposal Window 2020 Short Term**

Company Proposal ID PJMTST-01

PJM Proposal ID 541

My Tools ▾ Training Submitter PJMTST | PJM TEST (RWS\_TEST)

**Planning Center**

Competitive Planner

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**Project Components**

Project components \*

Select project component

Select project component

Transmission Line Reconstructor/Rebuild Component

Substation Upgrade Component

Greenfield Transmission Line Component

Greenfield Substation Component

Add

**Project Cost Summary**

Cost estimate (current year)

Cost estimate (in-service year)

Project in-service date 1.2021

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**Proposal Window 2020 Short Term**

Company Proposal ID PJMTST-01

PJM Proposal ID 541

- Describe the scope of the work for each major project component
- Provide a project cost breakdown by the indicated categories for each component
- Provide an in-service year component project total cost for Market Efficiency projects
- Identify the entity designated to build the component

## Competitive Planner

Success X

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**Project Components**

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### Project Components

Project components \*

Select project component

**▶ 1. Substation Upgrade** Saved as Draft   

## Competitive Planner

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### Project Financial Information Saved as Draft

Capital spend start date \*       Construction start date \*       Project Duration (In Months)    10

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#### Capital Expenditure Documents

*Describe what and why needs to be uploaded.*

Upload completed template \* + Choose File

Download blank template XLSX    Download completed template example PDF

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Save as Draft
Save & Validate

#### Project Cost Summary

Cost estimate (current year)

Cost estimate (in-service year)

Project in-service date    1.2021

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#### Proposal Window 2020 Short Term

Company Proposal ID    PJMTST-01

PJM Proposal ID        541

- Provide the Capital starting date of the project, then the Projected Construction Start Date
- User Completed Template that is provided within the tool

## Competitive Planner

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### Cost Containment Commitment Saved & Validated ✓

Cost cap (in current year)

Cost cap (in-service year)

#### Components covered by cost containment

*Select a checkbox next to each project component that will be covered by cost containment.*

1. Substation Upgrade - Construction Responsibility 1

#### Cost elements covered by cost containment

*Indicate which capital cost elements fall under the cap.*

Engineering & design *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Permitting / routing / siting *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
ROW / land acquisition *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Materials & equipment *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Construction & commissioning *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Construction management *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Overheads & miscellaneous costs *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Taxes *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
AFUDC *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Escalation *	<input checked="" type="radio"/> Yes	<input type="radio"/> No

**Project Cost Summary**

Cost estimate (current year)

Cost estimate (in-service year)

Project in-service date 1.2021

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**Proposal Window 2020 Short Term**

Company Proposal ID PJMTST-01

PJM Proposal ID 541

- Identify the Cost Containment Commitment and which components that have been saved prior are covered
- Identify the cost elements covered by cost containment

Additional Information \*

AI

- Is the proposer offering a binding cap on ROE? \*
- Would this ROE cap apply to the determination of AFUDC? \*
- Would the proposer seek to increase the proposed ROE if FERC finds that a higher ROE would not be unreasonable? \*
- Engineering & design \*
- Permitting / routing / siting \*
- ROW / land acquisition \*
- Materials & equipment \*
- Construction & commissioning \*
- Construction management \*
- Overheads & miscellaneous costs \*
- Taxes \*
- AFUDC \*
- Escalation \*
- Additional Information

- Yes  No

AI more

- Provide any additional information to clearly describe the Cost Containment being offered for the proposal

Is the proposer offering a Debt to Equity Ratio cap? \*

Yes  No

Additional cost containment measures not covered above

ACC

### Supporting Documents

To submit multiple files at once, please place them into a Zip file before uploading.

Cost commitment legal language \*

+ Choose File

05 Network.txt 

Provide language to be included in the Designated Entity Agreement that expresses the legally binding commitment of the developer to the construction cost cap.

Save as Draft

Save & Validate

- Provide any supporting documents at the end of the Cost Containment page.

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### Proposal Window 2020 Short Term

Full proposal view

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#### General Information

Proposing entity name *	PJMTST
Company proposal ID	PJMTST-01
PJM Proposal ID *	541
Project title *	New X/Y Line
Project description *	Project is a new line between X and Y substations utilizing AAA structures.
Project in-service date *	01/2021
Tie-line impact *	No
Interregional project *	No
Is the proposer offering a binding cap on capital costs? *	Yes
Cost containment commitment *	Yes
Additional benefits	For example: reliability, economics, etc.

**Project Cost Summary**

Cost estimate (current year)

Cost estimate (in-service year)

Project in-service date **1.2021**

**Proposal Window 2020 Short Term**

Company Proposal ID **PJMTST-01**

PJM Proposal ID **541**

Saved as Draft

Not validated. Click Pen button to edit/review and validate

## Supporting Documents

Project analysis attachments \*

[Comp Plan FG.xlsx](#)

Market efficiency simulation modeling files \*

## Overloaded Facilities

## Congestion Drivers

Validated. User can still click Pen button to edit before submittal

Saved & Validated ✓

CD #	Analysis type	From Bus No.	From Bus Name	To Bus No.	To Bus Name	CKT	Voltage	TO Zone
ME-565	Winter N1 Volt High	360337	ABC name4	342813	5SUMM SHAD T	1	161/161	PG&E
ME-564	Summer N1 Thermal	360336	ABC name3	342812	5SUMM SHAD T	2	161/161	PPL

## Existing Flowgates

Saved & Validated ✓

FG #	Analysis type	From Bus No.	From Bus Name	To Bus No.	To Bus Name	CKT	Voltage	TO Zone
N1-561	Summer N1 Volt Low	250086	XYZ name	249988	08BKJ135	1	138/138	PECO
N1-562	Winter N1 Volt High	360335	ABC name1	342812	5SUMM SHAD T	1	161/161	PPL
N1-563	Summer N1 Thermal	360335	ABC name1	342812	5SUMM SHAD T	1	161/161	PPL

## New Flowgates

Saved & Validated ✓

FG #	Analysis type	From Bus No.	From Bus Name	To Bus No.	To Bus Name	CKT	Voltage	TO Zone
FG-541-1	Winter N1 Volt High	876876	765	7687	686	876	100/200	AEP

## Comments

Additional Comments

A C

I certify that all information entered on this form is complete and accurate.

When all requirements have been validated check the certification box and the Submit button will highlight

The form cannot be submitted until all required fields are saved and validated.

Submit

## Competitive Planner

Homepage Existing Proposals **Proposal Form**

General Information  
Overloaded Facilities  
Project Components  
Financial Information  
Cost Containment Commitment  
Review  
**Confirmation**

Thank You. This proposal is marked for submission.

Project Cost Summary	
Cost estimate (current year)	
Cost estimate (in-service year)	
Project in-service date	1.2021

  

Proposal Window 2020 Short Term	
Company Proposal ID	PJMTST-01
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- Users are able to edit their submitted proposals prior to the closing of the Window, however please note that any change will remove the submission status from the proposal and you will need to “Save and Validate” each portion of the proposal again and “Submit” again as discussed earlier in the presentation.
- This submission can be resubmitted by anyone that has a submitter role.

- If you run into any additional issues regarding the tool, please reach out to the Competitive Planner Tool Admins at [ProposalWindow-Admin@pjm.com](mailto:ProposalWindow-Admin@pjm.com)

- Competitive Planner – User Guide
  - <https://pjm.com/-/media/etools/planning-center/competitive-planner-user-guide.ashx>
- Competitive Planner Demonstration
  - [https://videos.pjm.com/media/1\\_f7a912e2](https://videos.pjm.com/media/1_f7a912e2)

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## **Competitive Planner Tool**



### Member Hotline

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(866) 400 – 8980

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- V1 – 06/02/2022 – Original slides posted
- V2 – 06/03/2022 – Minor edits

**PROTECT THE  
POWER GRID**  
**THINK BEFORE  
YOU CLICK!**



Be alert to  
malicious  
phishing emails.

**Report suspicious email activity to PJM.**  
(610) 666-2244 / [it\\_ops\\_ctr\\_shift@pjm.com](mailto:it_ops_ctr_shift@pjm.com)

