

Problem/Opportunity Statement

Transparency Around Proprietary Models and Data Used by PJM

PJM uses many models and data from many sources for a variety of purposes, including forecasting, planning, operations, markets, and evaluating market designs, among many other purposes. In many instances the models or data are obtained from vendors who consider them proprietary, and PJM uses the models or data pursuant to license agreements that restrict access to them.

From time to time stakeholders may seek access to specific models, data, or analysis in order to better understand what PJM is doing with them, or to participate in a stakeholder process to consider changes to what PJM is doing with them. Such requests, which PJM will generally try to accommodate when the model or data is not proprietary, may be refused with reference to the vendor license agreement.

However, in some instances the vendor may actually be comfortable with provision of the model or data in some limited way that would satisfy the stakeholder request. See Example 1 below.

In other instances, there may be an opportunity for PJM to use publicly available data for its analysis, which would allow providing the data and analysis to stakeholders. See Example 2 below.

It is notable that in other venues utilities provide stakeholders much greater access to models and data, pursuant to Protective Agreements under which those receiving the models or data agree to restrictions on use of the models or data (for instance, in state-level Integrated Resource Planning proceedings).

The purpose of this Problem/Opportunity Statement and associated Issue Charge is to explore ways to provide greater transparency and stakeholder access to PJM's models, data, and analysis where vendor license agreements may appear to provide a barrier.

Problem/Opportunity, Example 1: Over ten years ago stakeholders sought access to the Moody's Analytics economic and demographic forecasts that were used in preparing the annual load forecast (in particular, the gross domestic product forecast was of interest), to better understand what was driving the forecasts. PJM refused, with reference to its license agreement. After persistent efforts by stakeholders, it was learned that Moody's Analytics was comfortable with PJM providing the forecasts in graphical form, or in aggregate form; it was only the fully granular raw data that must not be provided. Since that time, PJM has routinely shared with stakeholders details about the economic and demographic forecasts underlying the load forecasts. See, for instance, this presentation: https://www.pjm.com/-/media/committees-groups/subcommittees/las/2022/20221129/item-04k---economic-variable---real_personal_income.ashx

Problem/Opportunity, Example 2: More recently, a stakeholder sought a very small subset of the historical hourly temperature data that PJM was using in the load forecasting process. The stakeholder wished to explore the relationship between extreme temperatures and loads, to evaluate the accuracy of PJM's forecasting process in that regard. This request was refused on the basis that PJM obtains the temperature data from a vendor pursuant to a license agreement. The hourly temperature data is publicly available, as it ultimately comes from the U.S. government (NOAA). In this instance no solution was found to provide the very small subset of the public data sought by the stakeholder.