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# Distribution System Optimization to Manage Distributed Energy Resources (DERs) for Grid Services

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# Distribution System Optimization to Manage Distributed Energy Resources (DERs) for Grid Services

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## ABSTRACT

The proliferation of distributed energy resources (DERs) and the deployment of advanced sensing and control technologies in electric power distribution systems calls for coordinated management of the grid's resources. This has sparked a growing interest in optimization methods for large-scale unbalanced power distribution systems, with the goal of improving grid's operational efficiency and resilience. The current fast-paced research in this domain is driven by the challenging mathematical problem of three-phase optimal power flow (OPF). This monograph introduces the state-of-the-art optimization methods applied to unbalanced power distribution systems for the provisioning of grid services from DERs. To that end, fundamentals of D-OPF methods are introduced along with the unique challenges and differences compared to the bulk grid and related aspects of computational complexity due to mutual coupling, unbalanced loading conditions, and control of legacy devices. Different models for formulating D-OPF problems are described in

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detail, as are methods for relaxing or approximating the formulations to achieve computational tractability. Finally, the use of D-OPF formulations to solve distribution-level operational problems via advanced distribution-level applications is described in detail. The specific applications discussed in this monograph include: (1) Volt-VAR control and Conservation Voltage Reduction using legacy voltage control devices and DERs, and (2) Solutions for Tomorrow's Grid Reconfiguration and Restoration using DERs.

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# 1

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## Introduction

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With the integration of numerous actionable agents, distributed generation resources, and sensing devices, the electric power distribution system is rapidly evolving into an autonomous and intelligent system. For example, behind-the-meter photovoltaic (PV) output has reached 71.3 GW in the U.S. power grid, with over 2.5 million PV panels installed. Likewise, a recent study shows California's fleet of light-duty plug-in EVs could double the total transportation electricity demand, from under 5,000 GWh in 2019 to over 10,000 GWh by 2030. Simultaneously, the grid is also getting overwhelmed with extreme weather events that are happening at a higher frequency and causing greater damage. Recent fire-related damages and fatalities caused by high-voltage transmission lines combined with dry weather are costing billions of dollars each year, with the only practical solution being de-energizing the lines and disrupting the power supply to millions of customers. The recent advances in the distribution systems, including the integration of distributed generation (DGs), distributed energy resources (DERs), and microgrids provide potential means to improve the grid's operational resilience. An advanced decision-support system is needed to plan and manage grid operations by proactively managing the grid's variable,

uncertain, and distributed resources. Consequently, resilient operational solutions for power distribution grids have drawn significant attention. These applications range from leveraging recent advances in smart grid technology, such as remote control capabilities and DERs, to enable advanced grid services such as frequency and voltage support for the bulk grid and resilient operations through intentional islanding to support critical services during disruptions.

The need for advanced grid support functionality from a large number of DERs has sparked increased interest in optimization methods for large-scale unbalanced power distribution systems. This monograph provides a much-needed primer on optimization methods used in active power distribution systems for advanced operations, with the goal of benefiting researchers working in this field. The graduate students and young researchers working in the area of DERs and distribution systems operations need a background on not only topics related to power distribution engineering but also a wide variety of interdisciplinary subjects to address the upcoming challenges. The monograph will benefit a diverse pool of researchers and industry practitioners by building the necessary background on modeling the distribution systems (with DERs) and system optimization methods for provisioning grid services.

Specifically, we introduce the state-of-the-art optimization methods applied to unbalanced power distribution systems for the provisioning of grid services for efficient and resilient grid operations. We begin with mathematical descriptions of the unbalanced power flow and optimal power flow (OPF) models and describe a systematic approach to problem formulation using an example test feeder. Our discussion also includes a mathematical description of distribution system components and controllable devices. We describe the mathematical complexity of resulting optimization problems and introduce commonly used relaxation and approximation techniques for computational tractability. We also detail the limitations of the existing formulations. The mathematical formulations are complemented by open-source codes using example distribution systems. Following that, we will describe the problem formulation for multiple grid service application cases that use distribution OPF. These algorithms are tested with large-scale distribution test systems, and the implications of using DGs/DERs for specific grid

services are discussed. Finally, we summarize outstanding challenges and the need for additional research in this area.

## 1.1 Motivation for Optimizing Distribution Systems Operations

The utility distribution systems are designed to deliver reliable electric power economically to the electrical consumers at their place of consumption. However, over the last decade, the electric power grid has been transforming unprecedentedly, necessitating a significant change in how we design, operate, and control traditional power systems. Starting with the high penetration of DERs, the integration of electric vehicles (EVs), bi-directional power flow, and smart metering, the power grid, as we know, is changing. The inherent variability of renewable generation and the vulnerability of traditional power systems to the demand and generation stochasticity can potentially result in system-level problems. However, if deployed and controlled purposefully, these new technologies can provide multiple crucial grid services that can help improve the efficiency, reliability, and resilience of the power grid.

Historically, distribution system operations have been mostly passive, with rule-based methods primarily used to control the feeder's few legacy voltage control devices, such as capacitor banks and voltage regulators. These control rules were pre-designed and acted based on local measurements. Since the loads were predictable and the system lacked any local generation resources, the rule-based controls were sufficient to ensure desirable system operations. However, the integration of DERs led to added variability and uncertainty in distribution system operations rendering rule-based and local-control-only algorithms inapplicable. Multiple studies showed that the integration of active grid-edge resources such as photovoltaic generation (PVs) or new load types, such as EVs may lead to multiple system-level challenges, including, but not limited to, voltage limit violations (overvoltages/undervoltages), increased voltage variability and three-phase voltage unbalance, and thermal limit violations [42]–[44], [88], [137]. It was also shown that the local control might result in unnecessary tap changes and capacitor bank operations; these are mechanical devices, and a higher number of operations can lead to mechanical failures [1]. Mitigating these system-

level operational challenges requires a coordinated operation of systems' controllable devices, including the new resources. It was also recognized that the new grid-edge resources could provide additional grid services, such as capacity, flexibility, ramping, voltage support, and so on, that were previously not possible in a passive power distribution system. This resulted in the development of new methods and advanced applications to actively manage grid-edge resources [41].

With the evolution of active power distribution systems and new grid requirements, optimal power flow (OPF) methods emerged as a potential mechanism to optimize distribution system operations for different grid service requirements. A comprehensive review of OPF methods is provided in the following articles [26], [63], [95], [97]. When compared to the bulk power grid, distribution-level OPF (D-OPF) presents distinct challenges due to three-phase unbalanced loading, mutual coupling among the different phases of the line, the presence of single-phase and two-phase branches, and radial topology with a high R/X ratio, which causes significant voltage drops. Furthermore, grid-edge optimization necessitates the integration of various technologies such as battery storage, smart inverters, capacitor banks, voltage regulators, and secondary voltage controllers resulting in mixed-integer decision variables and inter-temporal constraints. Besides that, distribution-level optimization necessitates the inclusion of multiple sources of uncertainty from model and measurement data, resulting in computationally intractable stochastic optimization formulations. As a result, D-OPF formulations and approaches require separate consideration than bulk-grid models.

## 1.2 DGs/DERs for Grid Services and D-OPF Formulations

In this section, we identify the commonly discussed grid services that DERs could potentially provide. These services are identified as those that originated for the distribution system or for the bulk-grid level. We also identify the possible class of objective functions associated with each grid service, controllable devices, and DER control variables, see Table 1.1. It is worth noting that many of these DER-enabled grid services are currently being validated through field demonstrations or are in the process of being deployed in the field, see [5], [6], [40], [78],

**Table 1.1:** Grid Services from DGs/DERs that can benefit from Distribution Optimal Power Flow Models and Algorithms

Grid Services	Problem Objective	Controllable Devices
Improved support for voltage and power quality	Manage feeder voltages (magnitude, variability, unbalance), reduce losses	Voltage regulators, capacitor banks, DG active/reactive power
Network congestion management service	Manage network thermal limit constraints via network reconfiguration, network tariff design and flexibility procurement	Tie switches, sectionalizing switches, Building energy management system (BMS), active/reactives power from DGs and other DERs (BESS, EVs)
Avoided or deferred distribution capacity costs	Conservation voltage reduction, reduce system peak, manage system constraints	DG active/reactive power from DGs and other DERs (BESS, EVs), voltage control devices
Leverage demand response capability	Reduce system peak Manage system constraints	Building energy management system (BMS), active power from DGs and other DERs (BESS, EVs)
Reduce wholesale energy costs	Distribution market to optimize social welfare cost	
Reliability via DG-assisted restoration	Reduce outage duration	Tie switches, sectionalizing switches, grid-forming DGs, microgrids
Resilience via Intentional Islanding	Reduce outage duration, Stable islands	
Ancillary service (Bulk-grid frequency support)	Active power control for frequency support	Active power support from DGs and other DERs (BESS, EVs, BMS)
Ancillary service (Bulk-grid voltage support)	Reactive power control for voltage support	Reactive power support from DGs and other DERs (BESS, EVs, BMS)
Black-start regulation	Reduce system peak, Manage system constraint	Grid forming DERs
Flexibility reserve	Manage renewable variability	BESS, BMS, EVs
Energy and Ancillary service markets	Generate revenue by market participation	BESS, BMS, EVs

[143]. The procurement of these grid services can be formulated as an OPF problem with a specified objective function and constraints. The optimization problem type is dictated by control variables, the optimization time horizon, and the problem objective. Some grid services, such as bulk grid frequency and voltage support, may require a closed-loop formulation instead of an open-loop OPF model. Additionally, the problem formulation may involve multiple decision-making

hierarchies, such as coordinating distribution-level markets with wholesale markets. Although such applications can be modeled as one large optimization problem, they require hierarchical or distributed optimization approaches to manage the resulting computational complexity and information and data privacy requirements.

Mathematically, D-OPF is a constrained optimization problem. In its most general form, this results in a nonlinear mixed-integer optimization problem. However, several versions of the general model are solved depending on the decision variables and power flow models used in the problem definition [67]. A nonlinear D-OPF formulation is often solved where only continuous decision variables are modeled, excluding any discrete control devices in the formulation. These models can use bus-injection or branch-flow power flow models, resulting in different D-OPF formulations. In this case, the primary source of nonlinearity is due to nonlinear power flow equations. Given the difficulty of solving nonlinear optimization problems, power flow equations can be approximated or relaxed to produce a simpler linear or convex optimization formulations. Real-world D-OPF problems often require optimizing for both discrete and continuous control variables, resulting in a mixed-integer nonlinear optimization problem. These are some of the most difficult optimization problems to solve.

A list of problem types is described in Table 1.2. The control variables and optimization horizon will define the problem type. DG control parameters, such as active and reactive power dispatch from DGs, are modeled as continuous variables. However, integers, especially binary variables, are often included to model the connectivity/availability statuses of DG/DER devices; for example, the on/off status of EV charging, and the charge/discharge status of BESS are modeled as binary variables. Likewise, tap settings for voltage regulators and capacitor bank switch status are modeled as discrete decisions. The optimization time horizon is defined by the type of controllable device and whether they result in inter-temporal constraints. For example, the state-of-charge for BESS at future time intervals is a function of the current decision requiring a multi-time period optimization formulation. On the contrary, the reactive power dispatch from smart inverters connected to PVs does not carry any memory for the next time step and hence a single-



**Table 1.2:** Taxonomy of D-OPF Problem Types

D-OPF type	Power flow model	Optimization model	Decision variables
Nonlinear models	Bus-injection model [26]	NLP	Continuous
	Branch flow model [10], [11]	NLP	
Linear Approximate model	Lin-dist flow [46], [50]	LP	Continuous
	Other linearized models [58], [68], [127], [141]	LP	
Convex Relaxation models	Semi-definite relaxation [8], [46]	SDP	Continuous
	Second-order cone relaxation [46], [65], [68]	SOCP	
Mixed-integer models	Nonlinear power flow model [108], [148]	MINLP	Continuous, discrete
	Linear approximate model [99], [128]	MILP	
	Convex relaxation [4], [129], [134], [153]	MISOCP, MISDP	

period optimization will suffice. A stochastic optimization problem can be considered when it is important to incorporate uncertainty in the model parameters and measurements.

Table 1.3 details the controllable devices at the distribution level, corresponding controllable variables, and their types. Distribution systems primarily include legacy voltage control devices such as capacitor banks and voltage regulators, and feeder-level switches. Active distribution systems are integrated with various DER technologies, including PVs, BESS, EVs, BMS, etc. In the past decade, several power-electronics-based devices have also emerged as a viable option to control voltage and power flow in the distribution systems [13], [73], [91], [107]. Some examples include Low-voltage Distribution Static Compensator (D-STATCOM) [105], Static Var Compensator (SVC) [106], Unified power flow controller (UPFC) [33], [104], and Soft open points [70].

**Table 1.3:** Distribution-level Controllable Devices

Controllable Device	Controllable Parameter	Decision Variable
Voltage regulator	Tap setting	Discrete
Capacitor bank	On/Off status	Discrete
Feeder Switches	Connect/disconnect	Discrete
PVs with smart inverters	Active and/or reactive power	Continuous
	Connect/disconnect	Discrete
BESS with smart inverters	Active and/or reactive power	Continuous
	Charge/discharge status	Discrete
EVs	Active power	Continuous
	Charge/discharge	Discrete
BMS	Active power setpoints	Continuous
Other DGs (grid-following)	Active and/or reactive power	Continuous
	Connect/disconnect	Discrete
Other DGs (grid-forming)	Voltage and frequency	Continuous
	Connect/disconnect	Discrete
<i>Other Power Electronics Devices</i>		
Low-voltage Distribution STATCOM	Reactive power	Continuous
Unified power flow controller	Voltage and reactive power	Continuous
	Mode of operation	Discrete
Static Var Compensator (SVC)	Capacitor stages	Discrete
Soft Open Point (back-to-back VSCs, multiterminal VSCs)	Active and reactive power flow	Continuous

### 1.3 Organization of Monograph

The monograph is organized as follows. Section 1 introduces the concept of active power distribution systems, motivates the optimization for grid services, and describes the taxonomy for distribution-level optimization problems. Section 2 briefly reviews the distribution systems network and DER models for quasi-static analysis and optimization, including the distribution power flow models and algorithms. Section 3 develops the analytical framework for modeling distribution optimal power flow problems and introduces different approximation and relaxation techniques for scalability. Section 4 introduces discrete decisions into the distribution-level optimization problems and develops different mixed-integer distribution optimal power flow models. Sec-

### 1.3. *Organization of Monograph*

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tion 5 develops application cases for distribution-level services using DERs under normal operating conditions, namely services for voltage optimization. This section uses different OPF models introduced in Sections 3 and 4. Section 6 develops multiple application cases for resilient distribution systems operations using DERs in active power distribution systems. Section 7 presents some concluding remarks and future research directions.

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