

Development of an IESO Competitive Transmission Procurement Process

Stakeholder and Community Engagement Plan

I. Introduction

The Independent Electricity System Operator (IESO) invites feedback from all interested parties, including stakeholders and communities, to aid in the development of an IESO competitive transmission procurement process.

This Stakeholder and Community Engagement Plan outlines the background, objectives and proposed timelines related to this engagement initiative as well as the activities and methods to be used to engage interested parties.

For engagement purposes, four key phases have been identified:

- **Phase I: Early design work**
- **Phase II: Broad engagement**
- **Phase III: Draft process document(s)**
- **Phase IV: Final process document(s)**

This engagement plan may be reviewed and updated. As the IESO continues to develop the competitive procurement transmission process, revisions to the engagement plan may be required to ensure that interested parties have fair opportunity to provide input.

Inquiries and/or comments throughout this engagement process can be directed to engagement@ieso.ca.

II. Background

Following amendments to the *Electricity Act, 1998* that came into force July 2, 2016, the IESO was given the authority, under an approved implementation plan or directive, to enter into contracts for the development of transmission systems or any part of such systems. On October 26, 2017 the IESO was directed by the Minister of Energy to create an implementation plan outlining how it will develop a “competitive transmitter selection or transmission procurement process that is transparent, efficient and able to respond to changing policy, market and system needs.” The IESO submitted its implementation plan in January 2018, which was approved by the Minister of Energy on February 15, 2018.

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September, 2018

The process that will be developed through this engagement is anticipated to be scalable, based on the scope and complexity of potential projects. The IESO will also identify any potential amendments to legislation, regulation, policies or programs that would support implementation of the process. In addition to the process development, the IESO will identify any potential projects that may be suitable for a competitive selection or procurement process pilot, based on the scale, scope and need timeframe.

In the IESO's implementation plan, it committed to a completed process design in 2019. In advance of this deadline, the IESO has been completing internal design work to prepare for this engagement.

III. Interested Parties

The IESO encourages stakeholders, communities or their representatives to participate in this engagement through any or all of the Phases outlined in this engagement plan.

During the development of this process, the IESO will seek feedback from a broad spectrum of parties with an understanding of transmission procurement and/or transmission development, whether in Ontario or in other jurisdictions, or those parties with an interest in participating in Ontario's competitive transmission procurement process. In order to fully understand the requirements, and to ensure that there is equal opportunity for Indigenous communities, organizations, and/or companies to continue to participate in the energy sector through this process, the IESO will seek input specifically from these groups.

Participants may include parties from the following groups:

- Project developers
- Transmitters
- Regional Transmission Organizations (RTOs) / Independent System Operators (ISOs)
- Indigenous communities, organizations, and/or companies
- Industry associations
- Equipment suppliers
- Regulators
- Government ministries, departments, or agencies
- Municipalities
- Non-governmental organizations (NGOs) and/or special interest groups
- Members of the public and other interested parties

IV. Engagement Goal, Objectives, Scope, Approach and Methods

The IESO's goal is to develop a document or documents that will outline a flexible, scalable process to guide future IESO competitive transmitter selections and/or transmission procurements. As part of this initiative, the IESO will consider whether there are any suitable potential projects in which to pilot the process.

In order to achieve this goal, the IESO will engage with a broad set of stakeholders and communities, and will consider the input received in the design of the process.

This engagement plan will be implemented in accordance with the IESO's approved engagement principles. As this is a public engagement process, materials will be posted on the IESO website on a designated [engagement webpage](#). In addition, any information provided by participants of this engagement will be posted to the webpage, with their consent.

The approach for this engagement includes opportunities to provide input through various channels such as through webinars, meetings, written feedback, letters, surveys etc. The IESO will consider all relevant input and demonstrate how feedback was considered in developing the process, where feasible.

In order to successfully undertake this engagement, the objectives, scope, approach and methods of each phase have been outlined as follows.

Phase I: Early design work

Over the past couple of months the IESO has been completing early design work, which has included identifying the goals of the competitive transmission procurement process, conducting a jurisdictional scan to determine how other jurisdictions are competitively procuring transmission facilities, finalizing the engagement plan, and holding preliminary meetings with governments, agencies and other key parties to discuss regulatory issues.

The objective of this phase of the engagement is to inform interested parties on early process design principles and introduce the IESO's role in the engagement and the competitive transmission procurement process. A webpage will be launched to serve as a platform for posting information/materials, including background information and timelines. This Stakeholder and Community Engagement Plan will be posted on the webpage.

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Phase II: Broad engagement

The purpose of this phase of the engagement is to receive input of which will inform the development of the draft process document(s). It will consist of the following components.

A technical planning conference to kick off the engagement activities and to provide participants with the necessary background information to ensure all interested parties, including stakeholders and communities, can prepare themselves to provide meaningful feedback on the draft process. Following the conference there will be an opportunity for participants to provide additional feedback (e.g., through written feedback, letters, survey/questionnaire, etc).

Focused engagement activities based on the process design principles, and specific stakeholder and community needs (any materials that are presented and the meeting summaries will be posted publicly to ensure transparency). This may include webinars to provide more detail on specific aspects of the draft process (for example, funding/procurement design/needs assessment, etc.), individual meetings with interested parties, or group meetings related to specific issues. The IESO will also encourage and accept written feedback, which in turn will be summarized and include responses to the feedback, as applicable.

Phase III: Draft process document(s)

Using the recommendations collected from the engagement activities to date, the IESO will create a draft process document or documents that will be used to guide future IESO competitive transmission procurements.

The IESO will post the draft process document(s) for feedback on the webpage and will send a notification through an e-blast to subscribers, along with a posting on the IESO Bulletin to drive awareness. Written feedback will be accepted during a specified question and comment period, following which the IESO will summarize and provide responses to feedback, as applicable. Depending on comments received, the IESO may hold one-on-one meetings, workshops and/or webinars to hone design elements and further develop the process document(s).

Phase IV: Final process document(s)

Based on the feedback received during Phase III, the IESO will finalize the draft process document(s) for use as a guide in future transmission procurements.

The IESO will post the revised process document(s) for feedback on the webpage and will send a notification through an e-blast to subscribers, along with a posting on the IESO Bulletin to

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drive awareness. Written feedback will be accepted during a specified question and comment period, following which the IESO will summarize and provide responses to feedback, as applicable. Depending on comments received, the IESO may hold one-on-one meetings, workshops and/or webinars to hone design elements and further develop the process document(s).

The document(s) will then be finalized and posted on the webpage for reference and use in any future competitive transmission procurement.

V. Engagement Schedule

Engagement Schedule	
Activity	Expected Date*
Commence Phase I: Early design work	June – Sept. 2018
Webpage launch incl. public announcement of timelines/engagement plan	Sept. 2018
Technical Planning Conference agenda/registration link posted to webpage	Sept. 2018
Commence Phase II: Broad engagement	Sept. 2018 – Q1 2019
Technical Planning Conference	Sept. 13, 2018
Process design principles document posted to webpage	Sept. 2018
Focused engagement and outreach activities with interested parties	Sept. - Dec. 2018
Webinar on proposed design principles	Oct. 2018
Question and comment period	Oct. - Nov. 2018
First Nations Energy Symposium	Oct. 22 - 24, 2018
Métis Energy Symposium	Nov./Dec. 2018
Summary document posted to webpage	Dec. 2018
Commence Phase III: Draft process document(s)	End of Q1 2019
Post draft documents	Mar. 2019
Commence Phase IV: Final process document(s)	End of Q2 2019

**Please note: the expected dates listed above are preliminary, and may be subject to change*

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