

Reliability-Related Information

May 26, 2020

Opportunity

- Rename and redefine the term “*reliability-related information*” to avoid conflict with Chapter 5.
- Clarify the direction of information flows
- Improve consistency in terminology between the market rules and market manuals

Impact on Market Participants

- The proposed rule amendments do not introduce any new obligations nor remove any existing obligations
 - A separate stakeholder engagement was not initiated given that the proposal does not change existing market participant obligations
- The proposed market rule amendments will align the IESO Market Rules with the manner in which this information is currently being collected

Context

- The following appendices of Chapter 4 contain tables outlining information to be provided by *market participants* (MPs)
 - 4.5A- Generic Information (e.g. thermal ratings, relay information)
 - 4.6- Generation Facilities (generation unit data, characteristics)
 - 4.7- Facilities of Connected Wholesale Customers and Distributors Connected to the IESO controlled grid (e.g. load shape, motor loads)
 - 4.8- Network Impact Information: Ancillary Services Providers (characteristics required to participate in ancillary services)
 - 4.9 Transmission Facilities (e.g. circuit breakers)
- These tables form part of the defined term, *reliability-related information*
- Information requirements have changed since these were written, and MPs are now required to submit this information via Online IESO
- Chapter 7 section 2.2.5 allows these criteria to be stipulated outside of the market rules
- With Online IESO and related documentation, these appendices can be removed

Issues

- IESO connection assessment processes refer to these appendices
- These appendices are referred to in a defined term; *reliability-related information*
 - “*reliability-related information* means information described in Appendices 4.1 to 4.9 of Chapter 4”
- The defined term *reliability-related information* includes some information required for reliability purposes, but not all
 - Specifically it is focused on the information provided in the connection and market registration processes
- Chapter 5 refers to “*reliability-related information*”, but not to the defined term
- Sections 3.3.2 and 14.1.3 of Chapter 5 refer to a catalogue of reliability related information (Market Manual 11.3)

Proposal

1. Remove appendices 4.5A – 4.9
2. Rename defined term *reliability-related information* to *connection-related reliability information* and limit it to the information provided by market participants to IESO during the connection process
3. In the market rules, replace references to appendices 4.5A to 4.9 with the revised term *connection-related reliability information*
4. Revise Chapter 5 to make language consistent with MM 11.3, specifically by providing clarity in the direction of information flow by referring to:
 - Reliability information provided by the IESO
 - Reliability information required by the IESO
5. Review MM 11.3 to refer to the new defined term where appropriate and replace references to the appendices that will be removed

The Specifics; Modify defined term and remove Appendices

- *Add: Connection-related reliability information* means any information provided or requested pursuant to section 2.2.5 of Chapter 7 and/or section 6.1.6.2 of Chapter 4.
- ~~Remove: Reliability-related information means information described in Appendices 4.1 to 4.9 of Chapter 4;~~
- Remove Appendices 4.5A through to 4.9 inclusive.

The Specifics; Replace references to appendices 4.5A to 4.9

Chapter/ Sections	Changes
Ch4S6.1.6.2	<p>Without limiting the generality of sections 6.1.14 and 6.1.15, the IESO shall define the form and content of information required for a request for connection assessment. each request for connection assessment shall meet the requirements of section 6.1.15 and shall be accompanied by the information referred to in Appendices 4.5A to 4.9, as may be applicable, or such portion of that information as the IESO may allow. The Such <i>connection applicant</i> shall notify the transmitter of the filing of such request for <i>connection assessment</i>.</p>

The Specifics; Replace references to appendices 4.5A to 4.9

Chapter/ Sections	Changes
Ch4S7.1.3	...shall provide to the IESO <i>connection-related reliability information</i> described in Appendices 4.5A to 4.9 , as applicable prior to placing any <i>connected facility</i> into service.
Ch4S7.1.4	...for the purposes of this section 7.1 shall provide to the IESO <i>connection-related reliability information</i> described in Part A of Appendix 4.6 as may be requested by the IESO.
Ch4S7.1.5	...shall provide the IESO with applicable <i>connection-related reliability information</i> the data as listed in Part B of Appendix 4.6 .
Ch7.App.7 .4.S1.1.1	Full <i>connection-related reliability information</i> and transmission system data is required to be provided and updated to the IESO as applicable and in accordance with Section 2.2.5 of chapter 7 and Appendix Appendices 4.5A, 4.9 and 4.16 of Chapter 4.

The Specifics; Add Clarity to references to reliability-related information in Chapter 5

Chapter/Sections	Changes
Ch5S3.3.1	the <i>IESO</i> shall <i>publish</i> a list of the categories of <i>reliability</i> -related information that it shall make available provide to <i>market participants</i> ,
Ch5.3.3.2	the <i>IESO</i> shall publish a catalogue of the <i>reliability</i> -related information that the <i>IESO</i> shall require from be provided to it by from <i>market participants</i> ,

Use of the terms “provide to” and “required from” will make it consistent with Market Manual 11.3; Reliability Information Catalogue

Changes to Market Manuals

- The IESO evaluated changes to market manuals based on a threshold established from one of the recommendations of the Advisory Group on IESO Governance and Decision-Making
- The threshold measures market manual changes based on
 - Significant changes to market participant obligations
 - Material economic or operations impacts
- Where the change is deemed by the IESO to be material, draft market manuals will be provided
- Where the change is not deemed by the IESO to be material, market manual concepts will be provided

Changes to Market Manuals

- The IESO believes that the proposed changes do not have a material effect on obligations to market participants or associated impacts, so the market manual concepts are below
- MM 11, Part 11.3: Under Purpose, Section 1.1;
 - Replace references to “Appendices 4.2 to 4.9” with Appendix 4.2 to 4.4 and the LST-48 “Register Facility Help File” found [here](#).

Proposed Next Steps

- May 26 TP:
 - Review proposed market rule amendments and **vote to post** for broader stakeholder review and comment
- June 23 TP:
 - Review proposed market rule amendments and **vote to recommend** for IESO Board consideration
- August 25 BoD:
 - IESO Board review to enable proposed rule changes