



Market Rule Amendment Proposal

PART 1 – MARKET RULE INFORMATION

Identification No.:	MR-00289-R00		
Subject:	Outage Coordination		
Title:	14-day Advance Approval and Generator Testing – Outage Planning		
Nature of Proposal:	<input type="checkbox"/> Alteration	<input type="checkbox"/> Deletion	<input checked="" type="checkbox"/> Addition
Chapter:	5	Appendix:	
Sections:	6.2		
Sub-sections proposed for amending:	6.2.2B, C, D, E (new)		

PART 2 – PROPOSAL HISTORY

Version	Reason for Issuing	Version Date
1.0	Draft for Technical Panel Review	6 Apr 05
2.0	For Review by Outage Planning Subcommittee (same as version 1.2)	31 May 05
3.0	Submitted for Technical Panel Review	9 Jun 05
4.0	Incorporate Technical panel Comments and Post for Stakeholder Review and Comment	15 Jun 05
Approved Amendment Publication Date:		
Approved Amendment Effective Date:		

PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

Provide a brief description of the following:

- The reason for the proposed amendment and the impact on the *IESO-administered markets* if the amendment is not made.
- Alternative solutions considered.
- The proposed amendment, how the amendment addresses the above reason and impact of the proposed amendment on the *IESO-administered markets*.

Summary

These amendments propose to establish a 14-day advance approval mechanism for planned outages of generation, transmission, distribution and load facilities. The current market rules only permit a two-day advance approval. The proposed 14-day advance approval mechanism is intended to assist market participants in planning major outages for their facilities, by providing a greater measure of certainty that a major planned outage will be approved. It should be noted that the IESO would retain the right and authority to revoke a 14-day advance approval.

The proposed market rules establish limits as to the number of requests that a market participant can make for 14-day advance approval of planned outages for a given facility. Limits are necessary to balance the needs of market participants regarding greater certainty that a major outage will go ahead as planned and the increased workload for the IESO associated with 14-day advance approvals.

These amendments also propose a more flexible and efficient requirement for market participants to advise the IESO of the operating capability of the participant's facility during testing.

These amendments were developed as a result of two recommendations from the IESO-stakeholder Outage Planning Subcommittee of the Market Operations Standing Committee.

It is also proposed to change all "IMO" references in Chapter 5 to "IESO" in keeping with the organization name change resulting from the passage of Bill 100.

Background

In response to stakeholder concerns regarding the existing outage coordination provisions in the market rules, the IESO formed an IESO-stakeholder Outage Planning Subcommittee in the summer of 2003. The terms of reference and activities of the Subcommittee can be found on the IESO public web site at:

http://www.ieso.ca/imoweb/consult/outagePlanning_sub.asp.

The Outage Planning Subcommittee developed a set of the recommendations to address identified concerns. These recommendations can be found on the IESO public web site at:

http://www.ieso.ca/imoweb/pubs/consult/outagePlanning/op_Strawman_2003Dec19.pdf

Two of these recommendations are that:

1. the IESO grant 14-day advance approval for planned outages in order to facilitate the planning of major outages of market participant equipment; and
2. greater flexibility is necessary for to market participants in regard to the testing of generation facilities.

Other recommendations of the subcommittee that require market rule amendments would be considered

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included in future rule amendment submissions.

Discussion

New sections 6.2.2B, 6.2.2C and 6.2.2D – Planned Outages for Generation Facilities

These new sections would establish the rights of market participants to submit planned outages for a generation facility and request the IESO to consider those planned outages for 14-day advance approval.

The proposed rights balance the needs of the generator to plan major outages for its facility and the extra workload for the IESO in assessing planned outages for 14-day advance approval. Generators have indicated that their facilities typically have one major outage per calendar year. Such outages require significant planning and time to complete. A 14-day advance approval would facilitate efficient planning and coordination of these major outages. Additional IESO workload arises as once the IESO grants a 14-day advance approval for a planned outage, the IESO needs to re-evaluate, in light of changing grid conditions, that planned outage on a daily basis for 14 days i.e. from the day the advance approval is granted to the day the outage starts. Under the existing market rules with the two-day advance approval, the IESO only needs to evaluate a planned outage given advance approval for two days after the advance approval has been given.

To accommodate these annual major outages while keeping the IESO workload and costs to an acceptable level, the proposed market rules would permit the market participant to submit one planned outage for a generation facility each calendar year and request the IESO to consider that planned outage for 14-day advance approval. Refer to new section 6.2.2B.

Under certain conditions, the market participant would also be permitted to re-submit the planned outage for the generation facility twice more in the same calendar year and request the IESO to consider that planned outage for 14-day advance approval. These conditions are:

- The IESO does not grant a 14-day advance approval for the first planned outage submission; or
- The IESO does grant a 14-day advance approval for the first planned outage **but** subsequently revokes the advance approval or recalls the planned outage once it starts.

Therefore a market participant would have three opportunities in a calendar year to seek and obtain 14-day advance approval for a major outage for each generation facility. These opportunities are judged appropriate given the typical “windows” that exist for such major outages i.e. the spring and the autumn seasons and the frequency such major outages are needed.

Generators have also indicated that their facilities may have co-dependent outages in a calendar year. These co-dependent outages may be for:

- individual generation units aggregated within a single generation facility; or
- more than one generation facility where the energy production at one facility is dependent on the energy production at the other(s) e.g. a combined cycle generation plant that has more than one connection to the IESO-controlled grid.

To accommodate these co-dependent outages, under certain conditions it is proposed to permit a market participant to submit two co-dependent planned outages per calendar year and request the IESO to consider both planned outages for 14-day advance approval. These conditions are that:

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- the market participant can demonstrate to the satisfaction of the IESO that the planned outages are co-dependent; and
- the market participant identifies the total capacity impact for the generation facility or facilities in question of each planned outage.

The above conditions are judged necessary to ensure that the IESO can evaluate both planned outage submissions and also to provide a measure of control over the number of such requests. Refer to new section 6.2.2C.

In order to address the exceptional circumstance where a market participant has to take more than one major outage at a generation facility in a calendar year, it is proposed to permit a market participant to submit planned outages and request 14-day advance approval over and above the limits proposed above. Under this circumstance, the market participant would be required to provide the IESO with justification for the additional request for 14-day advance approval. Refer to new section 6.2.2D.

New section 6.2.2E and 6.2.2F – Planned Outages for Transmission, Distribution and Load Facilities/Equipment

These new sections would establish the rights of market participants to submit planned outages for transmission, distribution and load facilities/equipment and request the IESO to consider those planned outages for 14-day advance approval. It is proposed to limit a market participant to two such requests per month. Refer to new section 6.2.2E. This proposed limit:

- Recognizes the significantly large number of pieces of equipment and facilities and necessary major outages that a transmitter may have for its equipment and facilities; and
- Provides a measure of equity to distributor and load market participants without imposing a potentially significant extra IESO workload and costs. The outage requirements of distributors and loads are generally not as significant as those of a transmitter.

Comparable to the new proposed section 6.2.2D, it is also proposed to permit a market participant to submit planned outages and request 14-day advance approval over and above the limits proposed above in the new section 6.2.2E, provided the market participant provides the IESO with justification. Refer to new section 6.2.2F.

New section 6.2.2G and 6.2.2H – IESO Obligations to Consider Planned Outages for 14-day Advance Approval

The new section 6.2.2G would obligate the IESO to consider for 14-day advance approval all planned outages submitted under sections 6.2.2B, 6.2.2C and 6.2.2E.

The new section 6.2.2H would permit, but not obligate, the IESO to consider planned outages submitted under section 6.2.2D and 6.2.2F for 14-day advance approval. It is proposed that the IESO not be obligated to consider such requests for 14-day advance approval given that there are no limits on the number of planned outages that can be submitted under sections 6.2.2D and 6.2.2F and the IESO must manage its workload and resulting costs to the market.

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These IESO obligations are appropriate given that the 14-day advance approval mechanism is intended to address the planning of major planned outages, not every planned outage.

PART 4 – PROPOSED AMENDMENT

6.2 Outage Planning

- 6.2.1 Each *market participant* shall inform the *IMOIESO* of its long-term plans for *outages* in accordance with the provisions of this section 6.2.
- 6.2.2 Each *market participant* shall establish its *outage* planning process in such manner as will enable it to comply with its reporting and scheduling obligations under this section 6. Without limiting the generality of the foregoing, *market participants* shall be required to plan *outages* at least 33 calendar days in advance of the anticipated date of the *planned outage* and may be required by the *IMOIESO* to plan *outages* further in advance than 33 calendar days as the *IMOIESO* may determine appropriate.
- 6.2.2A *Market participants* applying to register their *facilities* as *transitional scheduling generators* shall provide, as part of the information required by section 2.2 of Chapter 7, a schedule of up to two *planned outages* per calendar year per *facility* that are demonstrably related to:
- a) contractual obligations owed to *OEFC* or a third party in respect of a *transitional scheduling generator*, or
 - b) significant resource mobilization issues pursuant to such contractual obligations.

Requests for 14-Day Advance Approval – Generation Facility Outages

- 6.2.2B A market participant may request 14-day advance approval for one planned outage for a generation facility per calendar year. If the IESO either:
- does not grant 14-day advance approval for the planned outage; or
 - does grant 14-day advance approval but subsequently revokes the 14-day advance approval or recalls the planned outage;
- the market participant may request 14-day advance approval for that planned outage for that generation facility on two more occasions in the same calendar year.
- 6.2.2C A market participant may request 14-day advance approval for two planned outages per calendar year for generation units within a single generation facility

or for separate generation facilities with co-dependent electricity production provided that:

- the market participant can satisfy the IESO that the two planned outages are co-dependent; and
- the market participant identifies the total capacity impact for the generation facility or generation facilities in question for each planned outage.

6.2.2D A market participant may request 14-day advance approval of planned outages for a generation facility more often than permitted under sections 6.2.2B and 6.2.2C.. The market participant must satisfy the IESO as to why the planned outages should be considered for 14-day advance approval.

Requests for 14-Day Advance Approval – Transmission, Distribution and Load Equipment Outages

6.2.2E A market participant may request 14-day advance approval for up to two planned outages per calendar month for:

- transmission equipment;
- distribution equipment; or
- equipment associated with a load facility.

6.2.2F A market participant may request 14-day advance approval for planned outages for transmission equipment, distribution equipment or equipment associated with a load facility more often than permitted under sections 6.2.2E. The market participant must satisfy the IESO as to why the planned outage should be considered for 14-day advance approval.

IESO Obligation to Consider Planned Outages for 14-Day Advance Approval

6.2.2G The IESO shall consider all planned outages submitted under sections 6.2.2B, 6.2.2C, and 6.2.2E for 14-day advanced approval.

6.2.2H The IESO may consider planned outages submitted under sections 6.2.2D and 6.2.2F for 14-day advance approval.

IESO Obligation to Include Planned Outages in Weekly Assessments

6.2.3 The ~~IMO~~IESO shall include in the weekly assessments referred to in section 7.3.1.3 all outages planned or scheduled by market participants to occur in the immediately following 33 calendar days as reported or scheduled by market participants and shall include in the monthly assessments referred to in section 7.3.1.2 all outages planned or scheduled to occur in the immediately following 18 months as reported or scheduled by market participants.

Transmitter and Generator Obligation to Provide Planned Outage Information for IESO Monthly Assessments

- 6.2.4 To support the monthly assessments referred to in section 7.3.1.2, and subject to section 6.2.5, for those *facilities* and equipment on the list developed in accordance with section 6.1.3, *transmitters* and *generators* shall, as frequently as may be necessary to maintain the accuracy of the information provided, report to the *IMOIESO* the *outage* plans for transmission *facilities* forming part of the *IMOIESO*-controlled grid and for *generation facilities*, respectively, as follows:
- 6.2.4.1 for *outages* starting 3 months or more in the future, those with a scheduled duration of 5 days or more; and
- 6.2.4.2 for *outages* starting less than 3 months in the future, those with a scheduled duration of 4 hours or more.

Exclusions for Outages for Generation Facilities

- 6.2.5 Notwithstanding any other provision of section 6, *outages* to the following *generation facilities* do not need to be reported to support the monthly assessments referred to in section 7.3.1.2:
- 6.2.5.1 in the case of all *generators*, *generation facilities* having a *capacity* of less than 20 MW; or
- 6.2.5.2 in the case of a *generator* whose total available capacity in Ontario exceeds 4000 MW, *generation facilities* that represent less than 0.5 percent of the total *capacity* of such *generator*, unless the *generation facilities* have been identified by the *IMOIESO* as affecting the *reliability* of the *IMOIESO*-controlled grid. The *IMOIESO* shall notify the relevant *generators* of any *generation facilities* so identified.

PART 5 – IESO BOARD COMMENTS

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Market Rule Amendment Proposal

PART 1 – MARKET RULE INFORMATION

Identification No.:	MR-00289-R01		
Subject:	Outage Coordination		
Title:	14-day Advance Approval and Generator Testing – Outage Confirmation and Approval		
Nature of Proposal:	<input checked="" type="checkbox"/> Alteration	<input type="checkbox"/> Deletion	<input type="checkbox"/> Addition
Chapter:	5	Appendix:	
Sections:	6.4		
Sub-sections proposed for amending:	Various		

PART 2 – PROPOSAL HISTORY – PLEASE REFER TO MR-00289-R00

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PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

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Summary

This amendment proposes:

- obligations on the market participant regarding the need and timing for confirming its requests for 14-day advance approval for a planned outage; and
- obligations on the IESO on advising the market participant on whether or not 14-avance approval has been granted.

Based on experience gained since market commencement, this amendment also proposes changes to the IESO obligations regarding keeping market participants informed of the status of their planned outage requests in order to make the process more efficient.

Background

Refer to MR-00289-R00.

Discussion

Section 6.4.1 and new section 6.4.1A

It is proposed to obligate the market participant to confirm its request for 14-day advance approval at the time of confirming the planned outage. This proposed obligation is intended to ensure that the IESO does not incur unnecessary costs evaluating a planned outage for 14-day advance approval where the market participant no longer wishes the outage to be considered for a 14 day advance approval. (new section 6.4.1.3)

It is also proposed to remove the existing planned outage confirmation timelines from section 6.4.1 and include them in the new section 6.4.1A. This new section 6.4.1A would also define the planned outage confirmation timelines when a market participant is seeking 14-day advance approval. The proposed confirmation timelines are:

- A market participant must confirm a planned outage submitted for 14-day advance approval between 33 days and 21 calendar days prior to the start date of the planned outage. 33 days prior is consistent with the current requirement on market participants to submit planned outages to the IESO at least 33 days in advance of the start date of the planned outage (refer to existing section 6.2.2 of chapter 5). To permit the IESO sufficient time to evaluate the planned outage and meet the proposed approval requirements, confirmation of the planned outage is required no less than 21 days prior.
- A market participant must confirm a planned outage submitted for two-day advance approval no earlier than 33 calendar days and no later than 10:00 EST on the third business day prior to the start date of a planned outage. The 33 calendar day outer limit for confirmation is proposed to ensure

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that market participants confirm each planned outage close to the start date of the outage so that the IESO only evaluate planned outages that market participants want. Experience has shown that market participants “confirm” their planned outage when they initially submit the planned outage months ahead of the planned start date. As that planned outage is already “confirmed”, the IESO is obligated to consider the outage for two-day advance approval. The IESO has then discovered, on occasion, that when it identifies to the participant that the confirmed planned outage has two-day advance approval, the participant indicates they no longer want the outage.

New Section 6.4.4.4A

This new section proposes to obligate the IESO to advise the market participant if 14-day advance approval for a planned outage is granted at least 14 calendar days before the planned outage start date. As the IESO outage coordination activities are normally conducted on business days, the obligation on the IESO is to advise the market participant no later than 14:00 EST on the last business day that is no later than 14 calendar days before the planned start date of the outage. This requirement would ensure the market participant is advised at least 14 calendar days prior to the planned outage start date.

This section also proposes that if the IESO does not grant 14-day advance approval, the IESO will automatically consider the planned outage for two-day advance approval. This obligation would mean that the market participant would not have to re-submit the planned outage for two-day advance approval. This does not preclude the market participant from removing the planned outage and re-submitting it for another time period if they so chose, as is currently allowed under the market rules.

Other parts of Section 6.4.4

Other amendments to section 6.4.4 are proposed to:

1. Remove the “as soon as possible” requirement on the IESO to assess each confirmed planned outage. This obligation implies that the IESO is required to assess each confirmed outage right after confirmation. Such an assessment, which would be required up to 33 days ahead of the planned start date, is not an effective use of IESO resources. Grid conditions can change dramatically between 33 days ahead and the planned start date, and any early assessment performed may be rendered irrelevant. The existing and proposed deadlines for the IESO to advise the market participant of the advance approval are considered adequate obligations to ensure that the IESO performs the assessments in a timely manner. Refer to section 6.4.4.2.
2. Maintain the obligation on the IESO to advise market participants of the expected outcome of the outage approval process but remove the obligation to do so “on a regular basis”. This latter obligation is proposed to be removed because it is not efficient to have the IESO constantly advise market participants of the expected outcome if there is no change in the expected outcome. The remaining obligation on the IESO to advise the market participant on the expected outcome is sufficient.
3. Remove references to confirmation timelines that would restrict application of the provisions to two-day advance approval. Refer to section 6.4.4.4.

Section 6.4.10

This section is amended to propose that outages re-scheduled under the conditions specified would be eligible for compensation if the IESO revoked or recalled the planned outage. Situations have occurred where the re-scheduling of a planned outage under section 6.4.10 has resulted, through the strict interpretation of the current market rules, in the planned outage being considered as a short-notice

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outage and therefore not eligible for compensation. The current restriction is not appropriate, as the re-scheduling is caused by events beyond the control of the market participant that occur after advance approval has been granted.

PART 4 – PROPOSED AMENDMENT

6.4 Confirmation of Outage Schedules and ~~IMO~~ IESO Approval of Outage Schedules

6.4.1 ~~Subject to sections 6.1.3 and 6.4.6, each market participant shall, no later than 10:00 EST on the third business day prior to the date of a planned outage, confirm with the IMO the planned outage in order to obtain IMO approval for the outage. In order to obtain IESO approval of a planned outage, a market participant shall confirm a planned outage with the IESO under the timelines specified in section 6.4.1A. At the time of the such confirmation, the each market participant shall:~~

6.4.1.1 provide information ~~pertaining to~~ about the recall of the *planned outage*, including the time required to return the *facilities* or equipment to service and other applicable conditions of recall; ~~and~~

6.4.1.2 if a *generator, distributor or wholesale consumer*, provide the costs or expenses associated with the cancellation or deferral of the *planned outage* and the estimated costs or expenses associated with the recall of the *planned outage*; and

6.4.1.3 confirm, if applicable, the request for 14-day advance approval for the planned outage.

6.4.1A If requesting a 14-day advance approval of a planned outage, the market participant shall confirm the planned outage with the IESO no earlier than 33 calendar days and no later than 21 calendar days prior to the start date of the planned outage.

If requesting a two-day advance approval of a planned outage, the market participant shall confirm the planned outage with the IESO no earlier than 33 calendar days and no later than 10:00 EST on the third business day prior to the start date of a planned outage.

6.4.2 Where the scheduling of *planned outages* submitted by different *market participants* conflicts such that the *planned outages* cannot both or all be approved by the ~~IMO~~ IESO, the ~~IMO~~ IESO shall inform the affected *market participants* and request that they resolve the conflict. Should the conflict remain unresolved, the ~~IMO~~ IESO shall determine which of the *planned outages* can be

approved on the basis of the precedence accorded to each *planned outage* pursuant to sections 6.4.13 to 6.4.18.

- 6.4.3 No *planned outage* shall occur or be permitted by a *market participant* to occur unless:
- 6.4.3.1 the *planned outage* has been confirmed with the *IMOIESO* in accordance with section 6.4.1;
 - 6.4.3.2 the *planned outage* has been approved by the *IMOIESO* in accordance with this section 6.4;
 - 6.4.3.3 immediately prior to the scheduled commencement of the *planned outage* or at a pre-arranged time specified by the *IMOIESO* when providing the advance approval referred to in section 6.4.4.5, the *market participant* has requested from the *IMOIESO* and has received the *IMOIESO*'s final approval to the *planned outage*; and
 - 6.4.3.4 the removal from service of the relevant equipment or *facilities* is undertaken under the direction of the *IMOIESO* where the *IMOIESO* has made the determination referred to in section 6.4.4.6.
- 6.4.4 The *IMOIESO* shall:
- 6.4.4.1 provide *advance approval* for a *planned outage* confirmed to it pursuant to section 6.4.1 and shall provide its final approval to the *planned outage* pursuant to section 6.4.3.3 unless it determines, based primarily on the weekly assessment referred to in section 7.3.1.3 with emphasis on the first two weeks and on the daily assessments referred to in section 7.3.1.4, that the *planned outage*, including but not limited to a *planned outage* identified by an *embedded generator*, will or is reasonably likely to have an adverse impact on the *reliable* operation of the *IMOIESO*-controlled grid;
 - 6.4.4.2 ~~as soon as possible~~ following receipt of confirmation pursuant to section 6.4.1, assess each confirmed *planned outage*;
 - 6.4.4.3 following receipt of an *outage* submission pursuant to section 6.2.1 or 6.3.1, or of confirmation pursuant to section 6.4.1, advise the relevant *market participant* of the existence of any conflict with a *planned outage* planned by another *market participant*;
 - 6.4.4.4 if the *market participant* confirmed the *planned outage* ~~was confirmed with the *IMOIESO* on or before 10:00 EST on the third business day prior to the date of the *planned outage* under section 6.4.1,~~ advise the relevant *market participant*, ~~on a regular basis,~~ of the expected outcome of the approval process;

- 6.4.4.4A if the *market participant* confirmed its *planned outage* and request for *14-day advance approval* under section 6.4.1, advise the *market participant* whether or not *14-day advance approval* of the *planned outage* has been granted no later than 14:00 EST on the last *business day* that is at least 14 calendar days before the schedule start date of the *planned outage*. Where the *IESO* does not grant *14-day advance approval*, the *IESO* shall consider the *planned outage* for *two-day advance approval*;
- 6.4.4.5 if ~~applicable the *planned outage* was confirmed with the *IMO* on or before 10:00 EST on the third *business day* prior to the date of the *planned outage*,~~ advise the ~~relevant~~ *market participant* of the *two-day advance approval* or rejection of the *planned outage* no earlier than 10:00 EST on the third *business day* prior to the date of the *planned outage* and no later than 14:00 EST on the second *business day* prior to the day on which the *planned outage* is scheduled to commence; and
- 6.4.4.6 when providing the final approval referred to in section 6.4.4.1, advise the *market participant* if the confirmed *planned outage* is to be undertaken under the direction of the *IMOIESO* where the *IMOIESO* has made a determination that this is necessary to maintain the *reliability* of the *IMOIESO*-controlled grid. If it is known in advance, the *IMOIESO* will advise the *market participant* of this requirement when providing the advance approval referred to in 6.4.4.5 or as soon as possible thereafter.
- 6.4.5 Where the *IMOIESO* does not provide advance approval of a *planned outage* or does not give its final approval to a *planned outage* pursuant to section 6.4.4, the *IMOIESO* shall work with the relevant *market participant* to re-schedule the *planned outage* to a date and time at which the *planned outage* will not or is not reasonably likely to have an adverse impact on the *reliable* operation of the *IMOIESO*-controlled grid. In re-scheduling the *planned outage*, the *IMOIESO* shall where reasonably practicable take into account the date and time preferences of the *market participant*.
- 6.4.6 If for any reason a *market participant* is unable to confirm a *planned outage* in accordance with section 6.4.1, the *market participant* may make a request to the *IMOIESO* for approval of a *planned outage* after 10:00 EST on the third *business day* prior to the date proposed by the *market participant* for the *planned outage*. The *IMOIESO* will process these short notice *outage* requests based on time stamp priority and on a best effort basis following the completion of its *reliability* assessments.
- 6.4.7 Each *market participant* shall notify the *IMOIESO* if a *planned outage* which has been approved by the *IMOIESO* will have a duration which exceeds the duration

originally approved by the *IMOIESO*, which notice shall include a request that the *IMOIESO* approve the extension. Such notice shall be provided to the *IMOIESO* as soon as possible and will be treated as a new *outage* request.

6.4.8 If the *IMOIESO* determines that an extension to the duration of a *planned outage* will or is reasonably likely to adversely affect the *reliability* of the *IMOIESO*-*controlled grid* or will or is reasonably likely to require the re-scheduling of a *planned outage* confirmed to the *IMOIESO* pursuant to section 6.4.1 or the revoking of advance approval, deferral or recall of a *planned outage* approved pursuant to section 6.4.4, the *IMOIESO* shall reject such extension and the *market participant* shall use its reasonable best efforts to ensure that the duration of the *planned outage* does not exceed the duration originally approved by the *IMOIESO* or such longer period as the *IMOIESO* may advise in rejecting the extension requested.

6.4.9 The *IMOIESO* may, where necessary to maintain the *reliability* of the *IMOIESO*-*controlled grid*, revoke an *advance approval* of a *planned outage*. Without limiting the generality of the foregoing, the *IMOIESO* may revoke an *advance approval* if:

6.4.9.1 the *IMOIESO* determines that either an *emergency operating state* or a *high-risk operating state* is occurring or is reasonably likely to occur at the time at which the *planned outage* would otherwise take place; or

6.4.9.2 necessary to avoid recalling a *planned outage* pursuant to section 6.4.11.

Planned outages that receive advance approval under section 6.4.4 but do not receive final approval pursuant to section 6.4.3.3 shall be considered to have *advance approval* revoked.

6.4.10 Where the *IMOIESO* revokes *advance approval* of a *planned outage* pursuant to section 6.4.9, the *market participant* may elect either to defer or to cancel the *outage*. When the *market participant* elects to defer the *outage*, the *IMOIESO* shall work with the relevant *market participant* to re-schedule the *planned outage* to a date and time at which the *planned outage* will not or is not reasonably likely to have an adverse impact on the reliable operation of the *IMOIESO*-*controlled grid*. In re-scheduling the *planned outage*, the *IMOIESO* shall where reasonably practicable take into account the date and time preferences of the *market participant*. A *planned outage* that is re-scheduled under this section is not considered a short-notice *planned outage* for the purposes of compensation under section 6.7.

6.4.11 The *IMOIESO* may, where necessary to maintain the *reliability* of the *IMOIESO*-*controlled grid*, recall a *planned outage* that has already commenced, having due regard to the time needed to return the *facilities* or equipment to service as

- identified by the relevant *market participant* pursuant to section 6.4.1.1 and shall so advise the relevant *market participant*. Such *market participant* shall arrange for the accelerated return to service of the *facilities* or equipment in accordance with the schedule identified by the *market participant* pursuant to section 6.4.1.1. The *IMOIESO* shall not recall a *planned outage* unless further control action is required and it has revoked advance approval or rejected requests for approval of all other *planned outages* the revocation or rejection of which could eliminate the need to recall the *planned outage* that has already commenced.
- 6.4.12 Each *distributor* shall, in reporting to the *IMOIESO* pursuant to sections 6.2 and 6.3, identify to the *IMOIESO* any *outages* that potentially constrain an *embedded generator* that is connected to its *distribution system*.
- 6.4.13 The *IMOIESO* shall time stamp each *outage* submission received by the *IMOIESO*. Where the *IMOIESO* is required or permitted by this section 6 to approve, reject, revoke advance approval of or recall one or more *planned outages*, such *planned outages* shall:
- 6.4.13.1 be given advance or final approval in order of precedence determined on the basis of sections 6.4.14 to 6.4.18; and
- 6.4.13.2 be rejected, be re-scheduled, have advance approval revoked or be recalled in reverse order of precedence determined on the basis of sections 6.4.14 to 6.4.18.
- 6.4.13A Subject to section 6.2.2A and notwithstanding section 6.4.13, where the *IMOIESO* is required or permitted by this section 6 to approve, reject, revoke advance approval of or recall one or more *planned outages* referred to in section 6.2.2A that were submitted at least 30 days prior to the *market commencement date*, such *planned outages* shall:
- be the first to be given advance or final approval; and
 - be the last to be rejected, revoked or recalled.
- 6.4.14 Where a *market participant* confirms a *planned outage* referred to in a previous *outage* submission prior to the confirmation deadline referred to in section 6.4.1 without changing the commencement, duration or nature of the *planned outage* as described in that previous *outage* submission, the time stamp associated with such previous *outage* submission shall be used by the *IMOIESO* in determining the precedence to be given to the *planned outage*. Where a *market participant* confirms a *planned outage* referred to in a previous *outage* submission subsequent to the confirmation deadline referred to in section 6.4.1 without changing the commencement, duration or nature of the *planned outage* as described in that previous *outage* submission, the time stamp associated with the time of receipt by

the *IMOIESO* of such confirmation shall be the time stamp used by the *IMOIESO* in determining the precedence to be given to the *planned outage*.

6.4.15 Where a *market participant* gives notice of a change in the commencement, duration or nature of a *planned outage* relative to the most recent *outage* submission, the *IMOIESO* shall stamp such notice with the time at which it was received by the *IMOIESO*, which time shall be used by the *IMOIESO* in determining the precedence to be given to the *planned outage*. Where such notice reflects only a shortening in the duration of a *planned outage* relative to the most recent *outage* submission for that *planned outage*, the time stamp associated with such previous *outage* submission shall be retained in determining the precedence to be given to the *planned outage*.

6.4.15A Where notice is given in respect of a *transitional scheduling generator* of a change in the commencement, duration or nature of a *planned outage* relative to an outage submission referred to in section 6.2.2A no later than 10:00 EST on the third *business day* prior to the date of the *planned outage*, the *IMOIESO* shall use the time stamp associated with such previous *outage* submission in determining the precedence to be given to the *planned outage*.

6.4.16 Where:

6.4.16.1 the *IMOIESO* revokes *advance approval* of a *planned outage* prior to the commencement thereof;

6.4.16.2 the *market participant* subsequently re-confirms the *planned outage* with the *IMOIESO*; and

6.4.16.3 the *IMOIESO* approves the re-confirmation,

the time stamp of the approved *planned outage* prior to the revocation of *advance approval* shall be deemed to be the time stamp of the re-confirmed *planned outage* for purpose of determining the precedence to be given to the *planned outage*.

6.4.17 Where:

6.4.17.1 a *planned outage* is, within 7 days of the date on which it was scheduled to commence, required by the *IMOIESO* pursuant to this section 6 to be re-scheduled;

6.4.17.2 the *IMOIESO* did not identify, through one or more of its reliability forecasts, a concern relating to reliability of the *IMOIESO*-controlled *grid* in respect of the time scheduled for the *planned outage*; and

6.4.17.3 the *planned outage* is re-scheduled to a date that is within 9 days of the originally scheduled commencement date,

the time stamp of the *planned outage* prior to the re-scheduling will be deemed to be the time stamp of the re-scheduled *planned outage* for purposes of determining the precedence to be given to the *planned outage*.

- | 6.4.18 Where the ~~IMO~~*IESO* has rejected a *planned outage* pursuant to section 6.4.5, the time of receipt of confirmation of the *planned outage* pursuant to section 6.4.1 shall be retained until such time as the confirmed commencement date of the *planned outage* has passed so as to facilitate the possible consent to the occurrence of the *planned outage* on the confirmed commencement date, in the event that the *reliability* concerns that prompted the rejection cease to preclude the occurrence of the *planned outage*.

PART 5 – IESO BOARD COMMENTS

Insert Text Here



Market Rule Amendment Proposal

PART 1 – MARKET RULE INFORMATION

Identification No.:	MR-00289-R02		
Subject:	Outage Coordination		
Title:	14-day Advance Approval and Generator Testing – Compensation		
Nature of Proposal:	<input checked="" type="checkbox"/> Alteration	<input type="checkbox"/> Deletion	<input type="checkbox"/> Addition
Chapter:	5	Appendix:	
Sections:	6.7		
Sub-sections proposed for amending:	Various		

PART 2 – PROPOSAL HISTORY – PLEASE REFER TO MR-00289-R00

Version	Reason for Issuing	Version Date
Approved Amendment Publication Date:		
Approved Amendment Effective Date:		

PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

Provide a brief description of the following:

- The reason for the proposed amendment and the impact on the *IESO-administered markets* if the amendment is not made.
- Alternative solutions considered.
- The proposed amendment, how the amendment addresses the above reason and impact of the proposed amendment on the *IESO-administered markets*.

Summary

This amendment proposes that a generation facility planned outage for which the IESO revoke 14-day advance approval would not be eligible for compensation if the reason for the revocation was the forced outage or outage extension of another generation facility with the same registered market participant. This exclusion is necessary to ensure that the rest of the market does not incur compensation costs for a revocation within the control of the generator.

Background

Refer to MR-00289-R00.

DiscussionNew Section 6.7.3A

This new section proposes to exclude compensation for a generation facility planned outage that received 14-day advance approval and was subsequently revoked or recalled by the IESO if the reason for the revocation or recall is either:

- the forced outage of a generation facility that has the same registered market participant as the generation facility that is the subject of the planned outage; or
- the delay in the return to service of a generation facility that has the same registered market participant as the generation facility that is the subject of the planned outage.

These exceptions are proposed as the identified forced outage or delayed return to service is, to some degree, within the control of the registered market participant. The rest of the market should not incur compensation costs for these events under the control of one registered market participant.

With respect to the first exception i.e. the forced outage of a generation facility that has the same registered market participant as the generation facility that is the subject of the planned outage; it is proposed to limit the application of the exception. The proposed limit would provide that the forced outage would need to occur before 14:00 EST of the second business day prior to the scheduled start of planned outage; i.e. if the forced outage occurs after 14:00 EST, the exception would not apply and the planned outage would be eligible for compensation. This proposed limitation is consistent with the current market rules surrounding two-day advance approval, i.e. under the current rules, a generation facility planned outage that receives two-day advance approval today and is revoked or recalled is eligible for compensation regardless of the reason for the revocation or recall. Advance approval today is given by 14:00 EST of the second business day prior to the scheduled start of planned outage.

PART 4 – PROPOSED AMENDMENT

6.7 Compensation

- 6.7.1 *Transmitters* whose *outages* are rejected or have *advance approvals* revoked or have *outages* recalled by the *IMOIESO* shall not be entitled to compensation for any costs, losses or damage associated with such rejection, revocation or recall.
- 6.7.2 *Generators, distributors or wholesale consumers* whose *outages* have *advance approval* revoked or have *outages* recalled by the *IMOIESO* shall, subject to the exceptions defined in sections 6.7.3 and 6.7.3A, be entitled to compensation for out-of-pocket expenses associated with such revocation or recall only if:
- 6.7.2.1 the *outage* was originally approved by the *IMOIESO* pursuant to 6.4.4;
- 6.7.2.2 the *outage* was recalled or had *advance approval* revoked by reason of a material error in the *IMOIESO*'s demand forecast, a failure of *generation facilities* within the *IMOIESO* control area, a failure of *facilities* forming part of the *IMOIESO*-controlled grid or a failure of *interconnection facilities*;
- 6.7.2.3 the out-of-pocket expenses were identified to the *IMOIESO* in accordance with section 6.4.1.2; and
- 6.7.2.4 the out-of-pocket expenses exceed \$1000.00.
- 6.7.3 No *generator, distributor or wholesale consumer* shall be entitled to compensation under section 6.7.2 in respect of an *outage* that was approved by the *IMOIESO* on short notice under section 6.4.6.
- 6.7.3A A market participant shall not be entitled to compensation under section 6.7.2 with respect to a planned outage of its generation facility that received a 14-day advance approval and that advance approval was subsequently revoked by the IESO if:
- 6.7.3A.1 the IESO revoked the 14-day advance approval as a result of a forced outage of another generation facility with the same registered market participant as the generation facility that was the subject of the planned outage and the forced outage occurred before 14:00 E.S.T. on the second business day prior to the scheduled start of the planned outage; or
- 6.7.3A.2 the 14-day advance approval was revoked as a result of a delayed return to service from a planned outage or forced outage of another generation facility with the same registered market participant as the generation facility that was the subject of the planned outage.

- 6.7.4 The out-of-pocket expenses claimed by *generators, distributors or wholesale consumers* pursuant to section 6.7.2 shall be subject to verification and audit by the *IMOIESO* and shall, where paid, be recovered by the *IMOIESO* in accordance with section 4.8 of Chapter 9.
- 6.7.5 A *generator, distributor or wholesale consumer* shall not be entitled to compensation for any costs, expenses, losses or damage associated with an *outage* which has been rejected by the *IMOIESO* provided that, in exceptional circumstances and where a *generator, distributor or wholesale consumer* has suffered substantial financial harm as a direct result of such rejection, the *generator, distributor or wholesale consumer* may request that an *arbitrator* be appointed pursuant to section 2 of Chapter 3 to determine whether and the amount of any compensation which the *generator, distributor or wholesale consumer* shall be entitled to recover as a result of the rejection of the *outage* by the *IMOIESO*. In the case of *generators*, no such compensation shall be recoverable under this section 6.7.5 unless the *generator* demonstrates that the amount claimed cannot be recovered through market prices.
- 6.7.6 Where a *generator, distributor or wholesale consumer planned outage* has been deferred as a result of the *IMOIESO* either revoking advance approval of or recalling the *planned outage*, the compensation entitlement for each such deferral ~~occurrence~~occurrence shall not exceed the compensation entitlement that would apply for cancellation as provided in section 6.4.1.2.
- 6.7.7 Each act of revocation or recall by the *IMOIESO* shall be treated separately for compensation purposes.

PART 5 – IESO BOARD COMMENTS

Insert Text Here



Market Rule Amendment Proposal

PART 1 – MARKET RULE INFORMATION

Identification No.:	MR-00289-R03		
Subject:	Outage Coordination		
Title:	14-day Advance Approval and Generator Testing – Definitions		
Nature of Proposal:	<input type="checkbox"/> Alteration	<input type="checkbox"/> Deletion	<input checked="" type="checkbox"/> Addition
Chapter:	11	Appendix:	
Sections:			
Sub-sections proposed for amending:			

PART 2 – PROPOSAL HISTORY – PLEASE REFER TO MR-00293-R00

Version	Reason for Issuing	Version Date
Approved Amendment Publication Date:		
Approved Amendment Effective Date:		

PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

Provide a brief description of the following:

- The reason for the proposed amendment and the impact on the *IESO-administered markets* if the amendment is not made.
- Alternative solutions considered.
- The proposed amendment, how the amendment addresses the above reason and impact of the proposed amendment on the *IESO-administered markets*.

Summary

Refer to MR-00289-R00.

Background

Refer to MR-00289-R00.

Discussion

This amendment proposes to introduce the following three new defined terms:

- Advance approval;
- 14-day advance approval; and
- two-day advance approval.

Definition of these terms is necessary to provide clarity and certainty as their meaning so that market participants and the IESO use the terms appropriately and consistently in their outage coordination activities.

Advance approval is defined to include both 14-day and two-day advance approvals. There are provisions of the market rules, such as outage revocation, that apply to planned outages that received either 14-day and two-day advance approval. Defining “advance approval” to include both types of advance approval will allow the use of a single defined term to refer to the other two where appropriate.

14-day and two-day advance approval are defined in terms of the IESO approval timelines as this is the distinguishing feature of each type of approval.

PART 4 – PROPOSED AMENDMENT

advance approval means IESO approval of a planned outage before the scheduled start date of the planned outage. Advance approval includes 14-day advance approval or two-day advance approval;

two-day advance approval means IESO approval of a planned outage of equipment no earlier than 10:00 EST on the third business day prior to the scheduled start date of the planned outage and no later than 14:00 EST on the second business day prior to the scheduled start date of the planned outage;

14-day advance approval means IESO approval of a planned outage of equipment no later than 14:00 EST on the last business day that is at least 14 calendar days before the schedule start date of the planned outage.;

PART 5 – IESO BOARD COMMENTS

Insert Text Here



Market Rule Amendment Proposal

PART 1 – MARKET RULE INFORMATION

Identification No.:	MR-00289-R04		
Subject:	Outage Coordination		
Title:	14-day Advance Approval and Generator Testing – Generation Facility Capability During Tests		
Nature of Proposal:	<input type="checkbox"/> Alteration	<input type="checkbox"/> Deletion	<input checked="" type="checkbox"/> Addition
Chapter:	5	Appendix:	
Sections:	6.6		
Sub-sections proposed for amending:	6.6.7		

PART 2 – PROPOSAL HISTORY – PLEASE REFER TO MR-00289-R00

Version	Reason for Issuing	Version Date
Approved Amendment Publication Date:		
Approved Amendment Effective Date:		

PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

Provide a brief description of the following:

- The reason for the proposed amendment and the impact on the *IESO-administered markets* if the amendment is not made.
- Alternative solutions considered.
- The proposed amendment, how the amendment addresses the above reason and impact of the proposed amendment on the *IESO-administered markets*.

Summary

This amendment proposes changes to the facility testing requirements to address market participant concerns and thereby increase the efficiency of the testing process. The proposed changes would:

- Specify a more efficient means for a market participant to inform the IESO of generation facility capability during testing;
- Remove an unreasonable obligation on a market participant wishing to conduct a test to inform all parties potentially affected by the test; and
- Provide the IESO with the total authority to permit a test and specify the criteria for granting permission to be the impact of the test on the reliable operation of the IESO-controlled grid.

Background

Refer to MR-00289-R00.

Discussion

There are three proposed amendments to this section.

The first amendment proposes to require a market participant to inform the IESO of generation facility capability during performance testing of that facility. Performance testing does not include the major testing or commissioning required of a facility that is either returning from a long planned outage or is new. Testing in those circumstances is handled through registering the generation facility as a self-scheduling facility under section 2.2A of chapter 7.

The proposed amendment would require the market participant to follow the process defined in the applicable market manual. This process would be to use derating slips in the IESO outage management system to reflect the operating capability of the generation facility during the testing. This process is more flexible and responsive than the current requirement on the market participant to revise its offers to reflect the operating capability of the facility. Refer to new section 6.6.7.

The second amendment would propose that market participants not be obligated to provide specified information to “other parties that are likely to be affected by the proposed test”. It is not reasonable to expect a market participant to know which parties would be potentially affected by a test. Refer to revised section 6.6.1.

Changes are also proposed to the criteria for approving a test. Refer to section 6.6.4. The proposed changes are needed for the following reasons:

- Market participants have raised a concern that the existing market rules would permit a single party

PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

to prevent a test requested by another market participant. Such unilateral ability is not appropriate given that consent could be withheld in order to maintain some commercial advantage.

- Given the proposed change to section 6.6.1, it would not be possible for all affected parties to be aware of a proposed test and hence expecting them to provide informed consent would not be appropriate.
- The existing section 6.6.1 is ambiguous as to the criteria under which the test could proceed. The ambiguity arises through the phrase “shall permit a test to be performed... unless all parties affected by the test are not in agreement...”

In light of these reasons, it is proposed that the IESO would permit the test provided there would not be an adverse impact on the reliable operation of the IESO-controlled grid.

PART 4 – PROPOSED AMENDMENT**6.6 Tests**

6.6.1 A market participant who wishes to engage in a test that could affect the reliability of the *IMOIESO*-controlled grid or the operation of the *IMOIESO*-administered markets shall provide the information referred to in section 6.6.2 to the *IMOIESO*. ~~and to other parties that are likely to be affected by the proposed test sufficiently in advance of the proposed test to allow coordination and assessment to take place.~~

6.6.2 As a minimum, the information referred to in section 6.2.1 shall identify:

- 6.6.2.1 the equipment involved;
- 6.6.2.2 the relevant details of contracts or agreements as they relate to the test activities;
- 6.6.2.3 preferred and alternative dates and times for the conduct of the test activities;
- 6.6.2.4 unusual system configurations or setup;
- 6.6.2.5 the expected impact of the test activities on power flows, voltage and frequency, and of any other dynamic that could interfere with the reliability of the *IMOIESO*-controlled grid;
- 6.6.2.6 details of special readings or observations, as available; and

- 6.6.2.7 the names of and methods of communication with personnel who will be involved in the test activities and who may be contacted with respect thereto.
- 6.6.3 Tests covered by the requirements of this section 6.6 shall include, but are not limited to:
- 6.6.3.1 the deliberate application of short circuits;
- 6.6.3.2 stability tests of *generation facilities* and transmission *facilities*;
- 6.6.3.3 planned actions which could cause abnormal voltage, frequency or overload; and
- 6.6.3.4 planned abnormal station or system configurations with inherent risk.
- 6.6.4 The ~~IMO-IESO~~ shall permit a test referred to in this section 6.6 to be performed ~~unless all parties affected by the test are not in agreement with the manner or timing of the test; or~~ if the ~~IMO-IESO~~ determines that the performance of the test will not have an adverse effect on the *reliability* of the ~~IMO-IESO~~-controlled grid or on the operation of the ~~IMO-IESO~~-administered markets.
- 6.6.5 In permitting a test to be performed, the ~~IMO-IESO~~ shall endeavour to permit the test to be performed at the time and on the date preferred as identified by the *market participant* pursuant to section 6.6.2.3.
- 6.6.6 This section 6.6 also applies to tests conducted pursuant to section 5 of Chapter 4.
- 6.6.7 During performance testing, a market participant shall keep the IESO informed of the expected operating capability of its generation facility using the outage management process as specified in the applicable market manual.

PART 5 – IESO BOARD COMMENTS

Insert Text Here



Market Rule Amendment Proposal

PART 1 – MARKET RULE INFORMATION

Identification No.:	MR-00289-R05		
Subject:	Outage Coordination		
Title:	14-day Advance Approval and Generator Testing – Dispatch Data Submissions During Testing		
Nature of Proposal:	<input checked="" type="checkbox"/> Alteration	<input type="checkbox"/> Deletion	<input type="checkbox"/> Addition
Chapter:	7	Appendix:	
Sections:	3.3		
Sub-sections proposed for amending:	3.3.8		

PART 2 – PROPOSAL HISTORY – REFER TO MR-00289-R00

Version	Reason for Issuing	Version Date
Approved Amendment Publication Date:		
Approved Amendment Effective Date:		

PART 3 – EXPLANATION FOR PROPOSED AMENDMENT

Provide a brief description of the following:

- The reason for the proposed amendment and the impact on the *IESO-administered markets* if the amendment is not made.
- Alternative solutions considered.
- The proposed amendment, how the amendment addresses the above reason and impact of the proposed amendment on the *IESO-administered markets*.

Summary

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Background

Refer to MR-00289-R00.

Discussion

This amendment is consequential to the proposed provisions regarding generator testing (refer to MR-00289-R04). Under section 3.3.8 of chapter 7, the registered market participant is required to submit offers/bids that reflect the operating capability of their facility. Under testing activities with its inherent uncertainty with respect to schedule and facility operating capability, this existing obligation imposes an unreasonable obligation on the registered market participant to continually update its offers in anticipation and response to changes in schedule and capability. Section 3.3.8 needs to be amended to recognize the proposed use of derating slips to advise the IESO of the facility's operating capability during testing.

It is proposed to amend section 3.3.8 to allow an exception to submitting offers that reflect the operating capability of their facility if the facility is undergoing testing.

PART 4 – PROPOSED AMENDMENT**3.3 Dispatch Data Submissions**

-
- 3.3.8 Notwithstanding any other provision of this section 3.3 and with the exception of testing specified in section 6.6 of Chapter 5, a registered market participant shall as soon as practical submit to the *IMO* revised *dispatch data* for any registered facility in respect of which it is the registered market participant if, for any *dispatch hour* in the current *pre-dispatch schedule*, the quantity of any *physical service* scheduled for that registered facility differs from the quantity the registered market participant reasonably expects to be delivered or withdrawn by more than the greater of (i) 2 percent (ii) such absolute amount as may be determined by the *IMO* based on considerations of *reliability* and *facility* specific

characteristics, (iii) in the case of a *cogeneration facility* that is either a *dispatchable* or *self-scheduling generation facility*, such amount based on the impact that the production of the other forms of useful energy within the *facility* has on *energy* production based on the information outlined in section 2.2.6.10, and the *IMO*, and (iv) in the case of an *enhanced combined cycle facility* that is either a *dispatchable* or *self-scheduling generation facility*, such amount based on the impact that the recovery of waste heat from an industrial process/processes within the *facility* has on *energy* production based on the information outlined in section 2.2.6.10, and the *IMO*:

- 3.3.8.1 shall, unless the change in quantity poses risks in relation to the *reliability* or *security* of the *electricity system*, include such change as an input in respect of any subsequent *market schedules* determined following receipt of the change; and
- 3.3.8.2 may refer such changes or revision of *dispatch data* to the *market surveillance panel*.

PART 5 – IESO BOARD COMMENTS

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