

# Market Manual

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## **Market Manual 2: Market Administration**

### **Part 0.2.8: Reliability Assessments Information Requirements**

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**Issue 1.0**  
**April 4, 2025**

**This procedure provides the steps required for market participants to submit the information required for reliability assessments.**

## Disclaimer

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This *market manual* may contain a summary of a particular *market rule*. Where provided, the summary has been used because of the length of the *market rule* itself. The reader should be aware, however, that where a *market rule* is applicable, the obligation that needs to be met is as stated in the *market rules*. To the extent of any discrepancy or inconsistency between the provisions of a particular *market rule* and the summary, the provision of the *market rule* shall govern.

### Document Change History

Issue	Reason for Issue	Date
Refer to Issue 8.0 (MDP-PRO-0024) for changes prior to Market Transition.		
1.0	Market Transition	April 4, 2025

### Related Documents

Document ID	Document Title
N/A	

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## Table of Changes

Reference (Paragraph and Section)	Description of Change
Throughout	Added reference to electricity storage participation where required.

## Market Transition

- A.1.1 This *market manual* is part of the *renewed market rules*, which pertain to:
- A.1.1.1 the period prior to a *market transition* insofar as the provisions are relevant and applicable to the rights and obligations of the *IESO* and *market participants* relating to preparation for participation in the *IESO administered markets* following commencement of *market transition*; and
  - A.1.1.2 the period following commencement of *market transition* in respect of all the rights and obligations of the *IESO* and *market participants*.
- A.1.2 All references herein to chapters or provisions of the *market rules* or *market manuals* will be interpreted as, and deemed to be references to chapters and provisions of the *renewed market rules*.
- A.1.3 Upon commencement of the *market transition*, the *legacy market rules* will be immediately revoked and only the *renewed market rules* will remain in force.
- A.1.4 For certainty, the revocation of the *legacy market rules* upon commencement of *market transition* does not:
- A.1.4.1 affect the previous operation of any *market rule* or *market manual* in effect prior to the *market transition*;
  - A.1.4.2 affect any right, privilege, obligation or liability that came into existence under the *market rules* or *market manuals* in effect prior to the *market transition*;
  - A.1.4.3 affect any breach, non-compliance, offense or violation committed under or relating to the *market rules* or *market manuals* in effect prior to the *market transition*, or any sanction or penalty incurred in connection with such breach, non-compliance, offense or violation; or
  - A.1.4.4 affect an investigation, proceeding or remedy in respect of:
    - (a) a right, privilege, obligation or liability described in subsection A.1.4.2; or
    - (b) a sanction or penalty described in subsection A.1.4.3.
- A.1.5 An investigation, proceeding or remedy pertaining to any matter described in subsection A.1.4.3 may be commenced, continued or enforced, and any sanction or penalty may be imposed, as if the *legacy market rules* had not been revoked.



# Market Manuals

The *market manuals* consolidate the market procedures and associated forms, standards, and policies that define certain elements relating to the operation of the *IESO-administered markets*. Market procedures provide more detailed descriptions of the requirements for various activities than is specified in the *market rules*. Where there is a discrepancy between the requirements in a document within a *market manual* and the *market rules*, the *market rules* shall prevail. Standards and policies appended to, or referenced in, these procedures provide a supporting framework.

## Market Procedures

The “Market Administration Manual” is Series 2 of the *market manuals*, where this document forms “Part 2.8: Reliability Assessments Information Requirements.”

### Structure of Market Procedures

Each Market Procedure is composed of the following sections:

**Introduction**, which contains general information about the procedure, including an overview, a description of the purpose and scope of the procedure, and information about roles and responsibilities of the parties involved in the procedure.

**Procedural Work Flow**, which contains a graphical representation of the steps and flow of information within the procedure.

**Procedural Steps**, which contains a table that describes each step and provides other details related to each step.

**Appendices**, which may include such items as forms, standards, policies, and agreements.

**- End of Section -**



# 1 Introduction

In accordance with Market Rules, Chapter 5, Section 7, each *market participant* shall provide information for the purpose of enabling the *IESO* to perform the *reliability* assessments.

- A *generator* is to use Form 1230 for submitting information
- An *electricity storage participant* is to use Form 1230 for submitting information
- A *transmitter* is to use Form 1494 for submitting information

## 1.1. Purpose

The *IESO* is required to prepare and *publish security* and *adequacy* assessments to meet its obligations to maintain the *reliability* of the *IESO-controlled grid* (MR Ch.5 s.7.3.1.5).

*Market participants* are required to provide information for the *IESO* to conduct the *security* and *adequacy* assessments described above (MR Ch.5 s.7.5.1).

This *market manual* specifies the information *market participants* and *connection applicants* must provide in support of the long-term *security* and *adequacy* assessments, i.e. assessments for the period beyond the next 18-months, and describes the process for submitting such information to the *IESO*.

## 1.2. Scope

Procedural work flow and procedural steps described in this *market manual* will serve as a roadmap for *market participants*, *connection applicants*, the *IESO* and other parties, and will reflect the requirements set out in the *market rules* (MR Ch.5 s.7 and MR Ch.10 s.8.8) and applicable *IESO* policies and standards.

The process relating to preparing and *publishing reliability* assessments covering the next 18-months (“Reliability Outlook”) is set out in “Part 2.11: Reliability Outlook and Related Information Requirements.”

The process relating to the production of the near-term *security* and *adequacy* assessments is set out in "Market Manual 7: System Operations."

Detailed and specific procedures internal to the *IESO* relative to forecasts and assessments are not provided.

**- End of Section -**

## 2 Overview

The *IESO* is required to conduct assessments of the *reliability* of the *IESO-controlled grid* (MR Ch.5 s.7.3.1.5). The *IESO* will *publish* the results of the above-mentioned *reliability* assessments.

With respect to *adequacy of generation facilities* and *electricity storage facilities* and *transmission facilities*, the purpose of the *reliability* assessments is to notify *market participants*, the *OEB* and the public of the *IESO's* evaluation of the *adequacy* of Ontario's resources for meeting the projected *demand* for electricity.

The *reliability* assessments are also designed to provide relevant *standards authorities* and government authorities with input on the status of *IESO-controlled grid security* and *adequacy*, and to assist the *OEB* in meeting its objectives (MR Ch.5 ss.7.4.5.2 and 7.4.5.3).

In conducting the *reliability* assessments, the *IESO* may identify an adverse condition on the *IESO-controlled grid* that requires action to be initiated within the next twelve months in order to maintain the *reliability* of the *IESO-controlled grid* (MR Ch.5 s.7.10.1). The process of issuing and responding to directives for proposal (DFP) is described in "Market Manual 2: Market Administration," Part 2.9: Directives for Proposal.

If the *IESO* identifies an adverse condition on the *IESO-controlled grid* that does not require action within the current annual planning period, the *IESO* shall notify the *OEB* of its determination and assess the options that may be available for *market participants* or others to remove or alleviate the condition (MR Ch.5 s.7.10.3).

In order to conduct its *reliability* assessments, the *IESO* requires *market participants* and *connection applicants* to provide the information set out in this procedure (MR Ch.4 ss.6.1.6, and 7.1.2, MR Ch.5 s.7.5.1, and MR Ch.10 s.8.7.2).

Information submitted as part of this procedure should include information for all relevant *facilities*, existing and planned, over the data coverage period defined in Section 3.1.

Annually, *market participants* and *connection applicants* shall submit the required information between March 1 and April 1.

**- End of Section -**

## 3 Information Requirements

### 3.1. Market Participant Information

Some of the required information related to the *reliability* assessments is provided by *market participants* via the market entry process, as detailed in “Market Manual 1.5: Market Registration Procedures”. Other information is submitted by *market participants* as part of the *outage* management process using the *IESO’s outage* management system, as detailed in “Market Manual 7.3: Outage Management.”

The remaining information must be provided by *market participants* using the associated forms listed in Appendix A (MR Ch.5 s.7.5.1, and MR Ch.10 s.8.7.2. The submitted data shall apply to the next 10 years and 6 months period starting from July 1 of the current calendar year, (e.g. information submitted by April 1, 2016 covers a period from July 1, 2016 to December 31, 2026).

When submitting the information required by this *market manual*, *market participants* must also ensure before April 1 that *outage* information relating to their *facilities* and associated *resources* for the specified data coverage period residing in the *outage* management system is up to date (MR Ch.5 s.7.5.1). In addition, they must keep up-to-date, at all times, the registration information they submitted to the *IESO* as part of the market registration process (MR Ch.5 s.7.5.1.

The *IESO* will assign an appropriate confidentiality level to all information received from *market participants* (MR Ch.3 s.5.4.1), and will obtain written permission from the *market participant* before *publishing* confidential information that is specific to that *market participant* (MR Ch.3 s.5.3.1.3b.

The forms listed in this procedure are to be used annually by *generators* and *electricity storage participants* (Form 1230) and *transmitters* (Form 1494) for submitting information. The forms are not to be used for submitting any information required by the *IESO* to prepare the near-term forecasts and assessments described in “Market Manual 7: System Operations.” Separate forms are available for these other forecast and assessment processes, as detailed in the relevant *market manual*.

## 3.2. Plans for New, Modified or Retiring Facilities

In preparing its *reliability* assessments, the *IESO* must consider any changes that could impact the *reliability* of the *IESO-controlled grid*. As such, information on all new, modified and retiring *facilities* that have estimated in-service or retirement dates falling within the specified data coverage period must be provided to the *IESO* by *market participants* and *connection applicants*.

*Market participants* and *connection applicants* must inform the *IESO* of any such plans they might have and submit the information required by this procedure using the forms listed in Appendix A, as relevant (MR Ch.5 s.7.5.1 MR Ch.10, s.8.7.2).

## 3.3. Timing

*Market participants* and *connection applicants* are required to submit information specified in this procedure to enable the *IESO* to perform *reliability* assessments (MR Ch.5 s.7.5.1. The information shall be submitted annually between March 1 and April 1. In advance of the last day to submit the require information, the *IESO* may send a reminder notice to *market participants*.

## 3.4. Information Contained in the Reliability Assessments

The results of *reliability* assessments will be made available to the public, as required, via the *IESO* website. The information in the *reliability* assessments will be presented in aggregate form where necessary for confidentiality purposes and will include, as appropriate:

### 1) Forecasts of:

- Ontario electricity *demand* (a summary of the methodology used to prepare the forecast will be provided in a separate document);
- generation and *transmission system* capability (including electricity storage, import and export capability);

### 2) Assessments of:

- the *adequacy* of relevant existing and planned generation, electricity storage and transmission *facilities* and other related resources, taking into account any planned retirements, to meet current and future electricity needs of Ontario; and
- relevant options identified by *market participants* independently or in response to *IESO* directives for proposal.

**- End of Section -**

## 4 Roles and Responsibilities

Responsibility for carrying out this procedure for providing *reliability* assessments related information is shared among:

- **Generators** and **electricity storage participants**, who are responsible for providing:
  - generation information and changes to information as per “Market Manual 1.5: Market Registration Procedures” and MR Ch.4 ss.6.1.6 and 7.1.2;
  - forecast information for existing, new or modified *facilities* as prescribed in Form 1230 (see Appendix A) and, where appropriate, inputs into the *outage* management system as per MR Ch.5 s.7.5.1; and
  - any additional information the *IESO* requires to conduct *reliability* assessments as per MR Ch.5 s.7.5.1.
- **Transmitters**, who are responsible for providing:
  - transmission information and changes to information as per “Market Manual 1.5: Market Registration Procedures” and MR Ch.4 ss.6.1.6 and 7.1.2;
  - forecast information for existing, new or modified *facilities* as prescribed in Form 1494 (see Appendix A) and, where appropriate, inputs into the *outage* management system, as per MR Ch.5 s.7.5.1 and MR Ch.10 s.8.7.2; and
  - any additional information the *IESO* requires to conduct *reliability* assessments as per MR Ch.5 s.7.5.1.
- **Connection applicants**, who are responsible for providing:
  - information required via the Connection Assessment and Approval process as per “Market Manual 1.4: Connection Assessment and Approval” and MR Ch.4 ss.6.1.6 and 7.1.2; and
  - information for the new or modified connections to the *IESO-controlled grid* that fall within the specified data coverage period, prescribed in the forms listed in Appendix A, as per MR Ch.4 s.7.1.2 and MR Ch.5 s.7.5.1.
- The **IESO**, who is responsible for (MR Ch.5 s.7):
  - receiving the information submitted by *market participants* and *connection applicants*;
  - conducting *reliability* assessments; and
  - *publishing* the results of those assessments.

**- End of Section -**



## 5 Submission and Response Methods

### 5.1. Contact Information

As part of the *market participant* authorization and registration process, applicants are able to identify a range of contacts within their organization that address specific areas of market operations. For *reliability* assessments, this contact will be the *market participant's* designated primary contact unless alternative arrangements have been established between the *IESO* and the *market participant*. *Market participants* are responsible for updating their contact information.

### 5.2. Submission of Data

Standard forms to be used for data submission for this procedure are listed in Appendix A. These forms are also available for download on the *IESO* website. The method for submitting the information is via email to [forecasts.assessments@ieso.ca](mailto:forecasts.assessments@ieso.ca).

All correspondence relating to this procedure shall include the following text in the subject to facilitate identification: **Reliability Assessments Information.**

- End of Section -

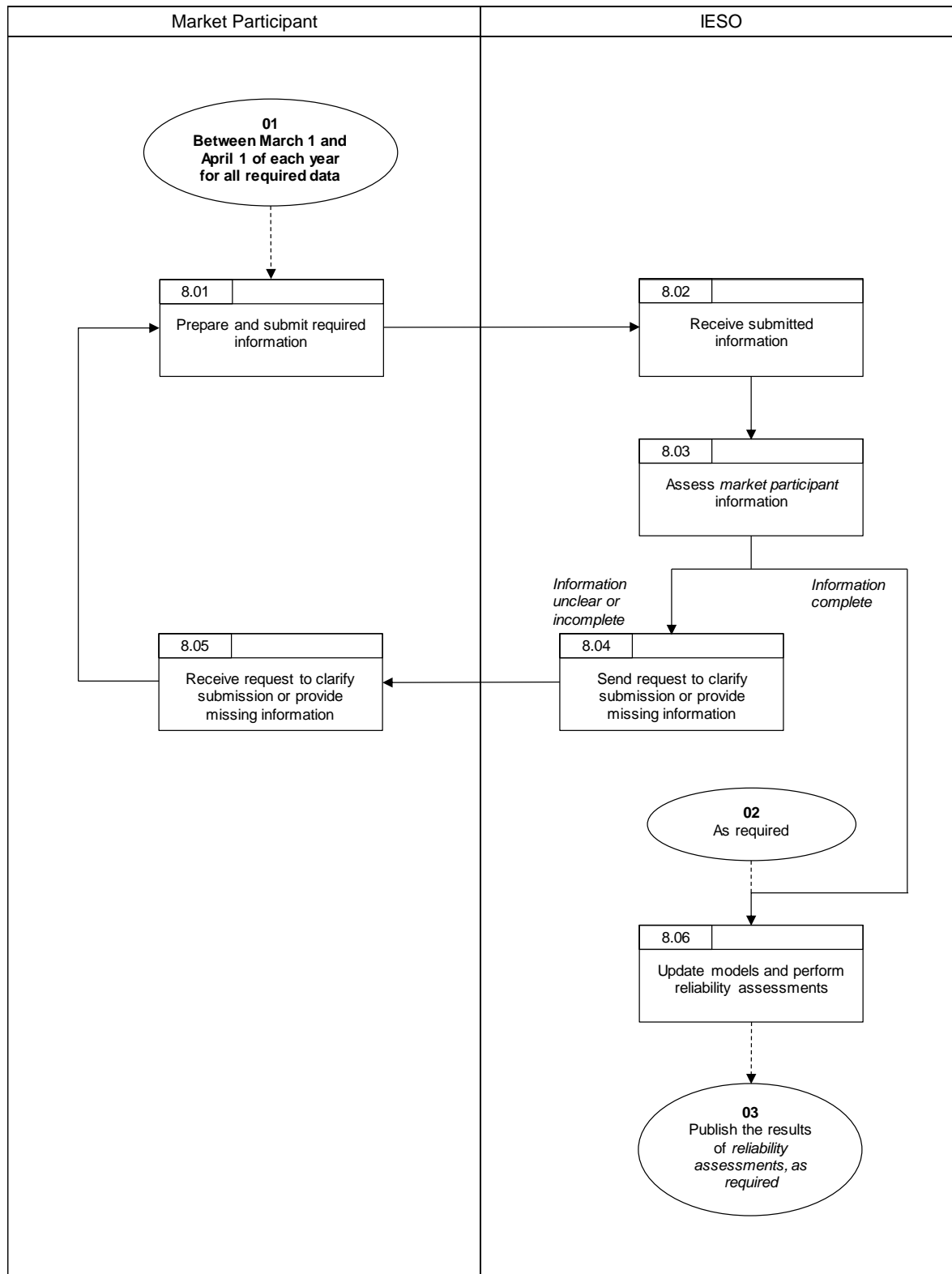
## 6 Procedural Work Flow

Figure 6–1 represents the flow of work and information related to providing *reliability* assessments information shared among the *IESO* and *market participants*.

The steps illustrated in the procedural work flow diagram are described in detail in Section 7.

**Table 6–1: Legend for Work Flow Diagram**

Legend	Description
Oval	An event that triggers task or that completes task. Trigger events and completion events are numbered sequentially within procedure (01 to 99).
Task Box	Shows reference number, task name and brief summary of task. Reference number (e.g., 1A.02) indicates procedure number within current <i>Market Manual</i> (1), sub-procedure identifier (if applicable) (A), and task number (02).
Solid horizontal line	Shows information flow between the <i>IESO</i> and <i>market participants</i> .
Solid vertical line	Shows linkage between tasks.
Broken line	Links trigger events and completion events, preceding or succeeding task.



**Figure 6–1: Work Flow for Submittal of Reliability Assessments Information**

**- End of Section -**



# 7 Procedural Steps

This section contains detail on the tasks (steps) that comprise the Reliability Assessments Information Requirements. The steps in the following table are illustrated in Section 6.

The table contains seven columns, as follows:

## Ref

The numerical reference to the task.

## Task Name

The task name as identified in Section 6.

## Task Detail

Detail about the task.

## When

Timeline for executing task.

## Resulting Information

A list of the information flows that may or must result from the task.

## Method

The format and method for each information flow.

## Completion Events

A list of all the circumstances in which the task should be deemed finished.



**Table 7–1: Procedural Steps for Submittal of Reliability Assessments Information**

Ref.	Task Name	Task Detail	When	Resulting Information	Method	Completion Events
8.01	Prepare and submit required information.	The <i>market participant</i> prepares the required information in accordance with the provided forms and sends the required information to the <i>IESO</i> .	Annually, between March 1 and April 1.	<p>Required information, as appropriate:</p> <p>For <i>generators</i> and <i>electricity storage participants</i>- Generator Information Submittal Form for Reliability Assessments (IMO_FORM_1230).</p> <p>For <i>transmitters</i> - Plans for New, Modified or Retiring Transmission Facilities Information Submittal Form for Reliability Assessments (IMO_FORM_1494).</p>	Via email.	Required information is sent to the <i>IESO</i> .

**Table 7–1: Procedural Steps for Submittal of Reliability Assessments Information**

Ref.	Task Name	Task Detail	When	Resulting Information	Method	Completion Events
8.02	Receive submitted information.	The <i>IESO</i> receives the required information from the <i>market participant</i> .	Following Step 8.01.  By April 1, annually, for all required data.	From <i>generators</i> and <i>electricity storage participants</i> : Completed Generator Information Submittal Form for Reliability Assessments (IMO_FORM_1230).  From <i>transmitters</i> : Completed Plans for New, Modified or Retiring Transmission Facilities Information Submittal Form for Reliability Assessments (IMO_FORM_1494).	Via email.	Required information received.

**Table 7–1: Procedural Steps for Submittal of Reliability Assessments Information**

<b>Ref.</b>	<b>Task Name</b>	<b>Task Detail</b>	<b>When</b>	<b>Resulting Information</b>	<b>Method</b>	<b>Completion Events</b>
8.03	Assess <i>market participant</i> information.	The <i>IESO</i> assesses the information provided by the <i>market participants</i> for completeness.	Following Step 8.02.	None.	None.	Information completeness determined. Unclear or missing information identified.
8.04	Send request to clarify submission or provide missing information.	The <i>IESO</i> sends a request to the <i>market participant</i> for the unclear or incomplete information.	Following Step 8.03, if information is unclear or incomplete.	Request for clarification or missing information.	By email.	Request to clarify submission or provide missing information sent <i>to market participant</i> .
8.05	Receive request to clarify submission or provide missing information.	The <i>market participant</i> receives the request to clarify submission or provide missing information and returns to Step 8.01.	Following Step 8.04, if information is unclear or incomplete.	None.	None.	Request to clarify submission or provide missing information received.



**Table 7–1: Procedural Steps for Submittal of Reliability Assessments Information**

<b>Ref.</b>	<b>Task Name</b>	<b>Task Detail</b>	<b>When</b>	<b>Resulting Information</b>	<b>Method</b>	<b>Completion Events</b>
8.06	Update models, conduct reliability assessments, and <i>publish</i> results, as required.	The <i>IESO</i> updates models, performs the <i>reliability</i> assessment, and <i>publishes</i> the results.	Following Step 8.04	Results of the <i>reliability</i> assessment.	Electronic publication on the <i>IESO</i> website.	<i>Reliability</i> assessment results <i>published</i> .

**- End of Section -**



## Appendix A: Forms

This appendix contains a list of forms associated with this procedure, which are available on the *IESO* website (<http://www.ieso.ca>). The forms included are as follows:

Form Name	Form Number
Generator Information Submittal Form for Reliability Assessments	IMO_FORM_1230
Plans for New, Modified or Retiring Transmission Facilities Information Submittal Form for Reliability Assessments	IMO_FORM_1494

**- End of Section -**



## References

Document ID	Document Title
RUL-06 to RUL-24	Market Rules
MAN-129	Market Manual 1.4: Connection Assessment and Approval
MAN-108	Market Manual 1.5: Market Registration Procedures
MAN-139	Market Manual 2.9: Directives for Proposal (DFP)
MAN-140	Market Manual 2.11: Reliability Outlook and Related Information Requirements

**- End of Document -**