

MANUAL

Market Manual 2: Administration

Part 2.3: Market Rule Amendment Procedure

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This *market manual* provides information to *market participants* on the operation of the *day-ahead market*.

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Document Control

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Table of Changes

Reference	Description of Change
Throughout	Update to align with MR-00492-R00: Chapter 3 Market Rule Amendment Process Refresh.

Market Manuals

Market manuals set out procedural and administrative details with respect to *market rule* requirements. Where there is a conflict between the requirements described in a *market manual* or appended document, and those within the *market rules*, the *market rules* shall prevail.

Market Manual Conventions

The standard conventions followed for *market manuals* are as follows:

- the word 'shall' denotes a mandatory requirement;
- references to *market rule* sections and sub-sections may be abbreviated in accordance with the following representative format: '**MR Ch.1 ss.1.1-1.2**' (i.e. *market rules*, Chapter 1, sections 1.1 to 1.2);
- references to *market manual* sections and sub-sections may be abbreviated in accordance with the following representative format: '**MM 1.5 ss.1.1-1.2**' (i.e. *market manual* 1.5, sections 1.1 to 1.2);
- internal references to sections and sub-sections within this manual take the representative format: 'sections 1.1 – 1.2';
- terms and acronyms used in this *market manual* in its appended documents that are italicized have the meanings ascribed thereto in **MR Ch.11**
- data fields are identified in all capitals.

– End of Section –

1 Introduction

1.1 Purpose

This *market manual* describes the activities required by the *IESO*, *market participants*, the *technical panel* and the *IESO Board*, and other relevant parties to initiate, assess and make an *amendment* to the *market rules*.

This manual supports and provides procedural guidance in accordance with the processes established in Chapter 3, Section 4 of the *market rules* - Market Rule Amendments.

1.2 Scope

This *market manual* supplements the following *market rules*:

- MR Ch.1 s.7.7: Other Documents
- MR Ch.3 s.4.1: Introduction and Interpretation
- MR Ch.3 s.4.2: Initiating a Market Rule Amendment
- MR Ch.3 s.4.3: Warrants Consideration Determination
- MR Ch.3 s.4.4: Vote to Post
- MR Ch.3 s.4.5: Vote to Recommend to the IESO Board
- MR Ch.3 s.4.6: IESO Board Review
- MR Ch.3 s.4.7: Urgent Amendments
- MR Ch.3 s.4.8: Amendments Subject to Order of the Ontario Energy Board
- MR Ch.3 s.4.9: Amendments initiated by the IESO Board or Technical Panel
- MR Ch.3 s.4.10: Experts and Other Assistance
- MR Ch.3 s.4.11: Oversight and Audit

1.3 Contact Information

Changes to this *market manual* are managed via the [IESO Change Management process](#). Stakeholders are encouraged to participate in the evolution of this *market manual* via this process.

To contact the *IESO*, you can email *IESO* Customer Relations at customer.relations@ieso.ca or use telephone or mail. Telephone numbers and the mailing address can be found on the [IESO website](#). *IESO* Customer Relations staff will respond as soon as possible.

– End of Section –

2 Initiating a Market Rule Amendment or Review

2.1 Initiated by any Interested Party

(MR Ch.3 ss.4.2.1 and 4.2.3)

Submission Form – Any interested party initiating an *amendment* or review of the *market rules* must complete the [Market Rule Amendment Submission Form \(Form 1466\)](#), available on the *IESO* website. External parties should submit the completed form to the *IESO* by email at: Rule.Amendments@ieso.ca

Completeness Review – Upon receipt of an *amendment submission*, the *IESO* will review the submission for completeness.

Timeline – The *IESO* will submit a complete *amendment submission* for *technical panel* review within five (5) *business days* of submission. The *IESO* will propose a priority and timeline for each *amendment submission* to maximize efficiency of the *technical panel's* agenda and the priorities of the *IESO*.

Interested Party – The *OEB* and the *IESO Board* are not “interested parties” for the purposes of MR Ch.3 s.4.2 and will not initiate *market rule amendments* through *amendment submissions*. Refer to MR Ch. 3 ss. 4.8 and 4.9 for information about how the *OEB* and *IESO Board* initiate *market rule amendments*.

2.1.1 Request for Feedback

(MR Ch.3 s.4.2.4)

If the *technical panel* requests further particulars or written submissions regarding an *amendment submission*, responding parties shall be provided at least seven (7) calendar days to respond to the request.

2.1.2 Meetings scheduled by the Technical Panel

(MR Ch.3 s.4.2.5)

Individuals may submit a meeting request to the *technical panel* and should provide reasons explaining why a meeting is necessary or desirable. The *technical panel* will determine whether such a meeting is warranted and, if so, establish the parameters of such a meeting.

2.2 Initiated by the IESO without Stakeholder Engagement

(MR Ch.3 s.4.2.2)

Other than in cases of *urgent rule amendments*, where the IESO initiates an *amendment* proposal without first completing a stakeholder engagement, it must file an *amendment submission* following the process described in MR Ch.3 s.4.2.1.

2.3 Initiated by the IESO via Stakeholder Engagement

(MR Ch.3 s.4.2.2)

Stakeholder Engagement – For the purposes of MR Ch.3 s.4.2.2, the *IESO's* stakeholder engagement of the proposed *amendment* will include:

- draft *market rule* amendments and related material *market manual* amendments;
- a request for written stakeholder feedback on draft *market rule* and *market manual* content as part of the stakeholder engagement.

Following the stakeholder engagement, a summary of stakeholder feedback will be presented to the *technical panel* as part of its review of the *amendment proposal*.

Education Session – The IESO may provide an optional education session at a Technical Panel meeting prior to submitting an *amendment proposal*.

Amendment Proposal Requirements – In addition to other requirements applicable to all *amendment proposals*, an *amendment proposal* initiated under MR Ch.3 s.4.2.2 will include the proposed *amendment* text, identification of the affected chapters, sections, or appendices, and a clear rationale for the proposed *amendment* outlining a summary, background, and discussion.

Procedure – An *amendment proposal* submitted by the IESO is deemed to warrant consideration and the Technical Panel may immediately vote whether to post it further to MR Ch.3 s.4.4.1.

3 Warrants Consideration

3.1 Warrants Consideration Determinations

(MR Ch.3 s.4.3.1)

Priority Determination – The *technical panel* will prioritize a matter as “regular priority” or “high priority”. Regular priority will be considered the norm, and a high priority will be the exception. High priority rule amendments will generally take precedence over regular priority *market rule* amendments and the *IESO* will take action to advance those amendments accordingly.

Unsolicited written submissions – The *technical panel* will consider any unsolicited written submissions that are received in time for the *technical panel* meeting at which the applicable *amendment submission* is being considered.

3.2 Assessment Criteria for Warrants Consideration Vote

(MR Ch.3 s.4.3.1)

When determining whether a matter warrants consideration, the *technical panel* will consider whether the *amendment submission*:

- a) identifies an error or inconsistency within the *market rules*, or between the *market rules* and *applicable laws*;
- b) identifies an *IESO-controlled grid* operation or *reliability* concern;
- c) identifies impediments to, or means to enable, operations and market coordination with rules, practices or regulations in neighbouring jurisdictions;
- d) identifies impediments to, or means to enable, making the *market rules* legally enforceable;
- e) identifies ambiguity or confusion within the *market rules* that cause interpretation confusion and leads to poor coordination of implementation or to future disputes;

- f) identifies means to better enable the market to satisfy the market design principles;
- g) identifies ways to simplify the market and/or reduce participant or *IESO* costs;
- h) enables the implementation of a deferred functionality;
- i) could result in a benefit that exceeds the expected or perceived costs of implementation.

3.3 Amendment Proposals

(MR Ch.3 s.4.3.7)

The IESO will prepare and file an *amendment proposal* for all *amendments* that warrant consideration, either through a vote by the *technical panel* or through the deeming provisions of MR Ch.3 s.4.3.2. The IESO will consult with the party that initiated the *amendment* when preparing the *amendment proposal*.

Amendment Proposal Form – Amendments will be submitted to the *technical panel* using [Market Rule Amendment Proposal Form \(Form 1087\)](#), available on the *IESO* website.

4 Vote to Post

4.1 Request for Feedback

(MR Ch.3 s.4.4.2.1)

The deadline for written responses will be no earlier than seven (7) calendar days following the publication date.

5 Vote to Recommend to the IESO Board

5.1 Vote to Recommend

(MR Ch.3 s.4.5.1)

The vote to recommend will occur after the period for stakeholder responses under MR Ch.3 s.4.4.2.1 has ended in all cases where the *technical panel* has invited written submissions.

5.2 Request for Feedback

(MR Ch.3 s.4.5.3)

The deadline for written responses will be a date no earlier than seven (7) calendar days following the date on which the request for feedback is published.

5.3 Publication of Report to IESO Board

(MR Ch.3 s.4.5.2 and 4.5.3)

The *IESO* shall *publish* any report of the *technical panel* on the *IESO* website and will provide notice of the report through the *IESO* weekly Thursday bulletin.

6 IESO Board Review

6.1 Materials Provided to IESO Board

(MR Ch.3 s.4.6.1)

In addition to the materials listed in MR Ch.3. s.4.5.2, the *IESO* will provide the following materials at the time the *technical panel* report is submitted to the *IESO Board*:

- Memo from Technical Panel Chair
- *Amendment proposal*
- Memo to Technical Panel from IESO staff
- Technical Panel vote and rationale document
- Summary of Stakeholder and Technical Panel Comments on the Impact of the Market Rule Amendment on Consumers Re: Price, Reliability, Quality of Electricity Service (Form 1514);
- Assessment of Impact of Market Rule Amendment on Consumers Price, Reliability and Quality of Electricity Service (Form 1513);
- Draft IESO Board resolution.

These materials will be posted on the Proposed Market Rule Amendments webpage prior to the *IESO's* Markets Committee/*IESO Board* meeting.

6.2 Public notice of Amendment Decision

(MR Ch.3 s.4.6.3)

The *IESO* will *publish* the decision, written reasons, and text of the approved amendment (if applicable) on the *IESO* website. Notice of the decision will also be included in the *IESO* weekly Thursday bulletin.

– End of Section –

7 Minor Amendments

(MR Ch.3 s.4.3.1.3, 4.4.4)

7.1 Criteria for Minor Amendments

In addition to the criteria included in the definition of a *minor amendment*, any *amendment submission* that proposes or results in any of the following impacts would **NOT** be a *minor amendment* under MR Ch.3 s.4.3.1.3:

- a) A change requiring *market participant* or the *IESO* to incur material additional costs in order to effect the *amendment* or to be compliant with a change brought about by the *amendment*.
- b) A change in how schedules (including *bid* and *offer* submission schedules, auction schedules, etc.,) or *energy* prices are determined.
- c) A change in how *ancillary service* are procured or compensated.
- d) A change in the level or timing of information released to the marketplace.
- e) A change to the conditions for participation that would cause any currently authorized *market participant* to no longer be authorized.
- f) A change that introduces additional risks of the *IESO* not being able to direct the operation of the *IESO-controlled grid* and maintain system or local area *reliability* to meet the applicable standards.

7.2 Minor Amendment Omnibus

The IESO may package multiple minor amendments into a consolidated minor amendment "omnibus".

– End of Section –



8 Urgent Amendments

8.1 Public Notice of Urgent Amendment

(MR Ch.3 ss.4.7.2, s.4.7.5, and s.4.7.6)

The *IESO* will *publish* the applicable decision, and effective date and time on the *IESO* website as soon as practicable following the decision. The *IESO* may also communicate the decision through the *IESO* weekly bulletin or other stakeholder communication channels, as appropriate.

– End of Section –

9 Amendment subject to Order of the Ontario Energy Board

9.1 Initiating Market Rule Amendment (OEB)

(MR Ch.3 s.4.8.2)

The *IESO* will *publish* the amendment on the *IESO* website and may provide notice through the *IESO* weekly Thursday bulletin or other stakeholder communication channels, as applicable. Where applicable, the publication of the amendment will identify the effective date of the amendment and any implementation information relevant to *market participants*.

– End of Section –

10 Amendments initiated by the IESO Board or Technical Panel

10.1 Initiating Market Rule Amendment (IESO Board)

(MR Ch.3 s.4.9.1)

The *IESO* will *publish* any required notices, reports, *amendment submissions*, *amendment proposals*, and supporting materials through the *IESO* website.

The *IESO* may also communicate notices and related materials through the *IESO* weekly Thursday bulletin or other stakeholder communication channels, as applicable.

Request for Feedback – The *IESO Board* will establish a deadline for the submissions, which will be at least seven (7) calendar days in length.

10.2 Review Notice Process (Technical Panel)

(MR Ch.3 s.4.9.3)

The *technical panel* must notify the *IESO Board* if it intends to pursue a *market rule amendment* or review on its own initiative. This notification occurs through a *review notice*. The purpose of the *review notice* is for the *technical panel* to explain why it decided to undertake the *amendment* or review. The *review notice* is distinct and comes before the steps required to initiate an *amendment* or review under MR Ch.3 s.4.2.1. In

all cases, the *technical panel* will need to file an *amendment submission* under MR Ch.3 s.4.2.1 to initiate the *amendment* process.

Review Notice waiting period: After filing a *review notice* with the *IESO Board*, the *technical panel* will wait seven (7) calendar days before submitting an *amendment submission* under MR Ch.3 s.4.2.1.

– End of Section –

11 Changes to Market Manuals

(MR Ch.1 s.7.7.2A; MR Ch.3 s.4)

11.1 Market Manual Content

The *IESO* is responsible for *market manual* content and for ensuring that the *market manuals* provide appropriate technical, administrative, and procedural details to operationalize the *market rules*.

11.2 Manual Change Process

Baseline Process – The *IESO* will implement changes to *market manuals* in accordance with the baseline process set out in MM 2.13: Market Document Baseline Management.

Part of MR Amendment Process – Where *market manual* changes are proposed in connection with proposed *market rule amendments*, interested or concerned parties should provide comments regarding the *market manual* changes as part of the *market rule amendment* stakeholder engagement or Technical Panel review process.

Advance of Baseline Process – In some cases, the *IESO* may provide stakeholder education and opportunity for comment on proposed changes in advance of initiating the Baseline process set out in MM 2.13. The *IESO* will publish any written comments it

receives through this advance process, along with responses and any responsive changes, prior to initiating the market manual change through the Baseline process.

Review of Market Manuals in Conjunction with Market Rules - External stakeholders and the *technical panel* will be provided draft *market manual* content to review in conjunction with a proposed *market rule amendment* where:

- The proposed *market rule amendment* requires an associated *market manual* change; and
- Review of the associated *market manual* change is required to fully understand and assess the proposed *market rule amendment* before the *technical panel*.

Market manual change proposals will not be provided to *technical panel* for review unless they relate to a *market rule amendment* under contemporaneous review by the *technical panel*.

Providing Comments – Interested parties may provide comments regarding proposed *market manual* changes that relate to *market rule amendments* as part of the *market rule amendment* stakeholder engagement or *technical panel* review process, as applicable.

11.3 Other Suggested Changes

Parties wishing to propose a substantive change to a *market manual* outside of a *market rule amendment* or Baseline change process should contact the *IESO* with their suggested change. Parties may provide their suggested change to an existing operational contact at the *IESO* or by contacting customer.relations@ieso.ca. The *IESO* makes efforts to respond to proposed *market manual* changes and to assign appropriate priority to their consideration.

Disagreement with IESO Market Manual Content – Where a concerned party objects to ~~the implementation of a~~ how a *market manual* operationalizes a *market rule*, ~~through its corresponding market manual content,~~ that party may file an *amendment submission* proposing a change to the underlying *market rule* or

introducing a new *market rule* that would preclude the corresponding *market manual* content. *Amendment submissions* in these cases will be subject to the process set out in MR Ch.3, s.4.

– End of Section –



References

Document ID	Document Title
RUL-6 to RUL-24	Market Rules
MAN-141	Market Manual 2.13: Market Document Baseline Management

– End of Document –