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**Market Manual 2: Market Administration**

**Part 2.11: 18-Month  
Outlook and Related  
Information  
Requirements**

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**Issue 8.0**

*This procedure provides the steps required for market participants to submit the information required for the 18-Month Outlook, and specifies the information to be contained in the Outlook.*

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<b>Document ID</b>	IMP_PRO_0024
<b>Document Name</b>	Part 2.11: 18-Month Outlook and Related Information Requirements
<b>Issue</b>	Issue 8.0
<b>Reason for Issue</b>	Released for Baseline 28.1
<b>Effective Date</b>	December 5, 2012

## Document Change History

<b>Issue</b>	<b>Reason for Issue</b>	<b>Date</b>
1.0	IMO Board approved	August 29, 2000
2.0	Released for Baseline 6.1	March 26, 2001
3.0	Issue released for Baseline 6.2	May 22, 2001
4.0	Issue released for Baseline 7.0	January 09, 2002
5.0	Update to Baseline 7.0	June 26, 2002
6.0	Issue released for Baseline 8.1	December 04, 2002
7.0	Issue released for Baseline 21.1	June 3, 2009
8.0	Issue released for Baseline 28.1	December 5, 2012

## Related Documents

<b>Document ID</b>	<b>Document Title</b>

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# Table of Changes

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<b>Reference (Paragraph and Section)</b>	<b>Description of Change</b>
Figure 2-1	Updated publication date for 18-month outlook document
Section 1.7	Changed reference from PLC to CDMS

# Market Manuals

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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

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The “Market Administration Manual” is Volume 2 of the *market manuals*, where this document forms “Part 2.11: 18-Month Outlook and Related Information Requirements.”

A list of the other component parts of the “Market Administration Manual” is provided in “Part 2.0: Market Administration Overview”, in Section 2, ‘About This Manual’.

## Structure of Market Procedures

Each Market Procedure is composed of the following sections:

1. **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.
2. **Procedural Work Flow**, which contains a graphical representation of the steps and flow of information within the procedure.
3. **Procedural Steps**, which contains a table that describes each step and provides other details related to each step.
4. **Appendices**, which may include such items as forms, standards, policies, and agreements.

## Conventions

The *market manual* standard conventions are as defined in the “Market Administration Manual, Part 2.0: Market Administration Overview” document.

– End of Section –

# 1. Introduction

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## 1.1 Purpose

The *IESO* is required by the “Market Rules” to prepare and *publish*, quarterly, a forecast of *demand* (“Market Rules”, Chapter 5, Section 7.1.1.4), and a *security and adequacy* assessment (“Market Rules”, Chapter 5, Section 7.3.1.2), both for an 18-month period. As a result, the *IESO* will *publish*, quarterly, the 18-Month Outlook (the Outlook) to satisfy this requirement.

*Market participants* are required by the “Market Rules” (Chapter 5, Section 7.5.1) to provide the required information for the *IESO* to conduct both the quarterly forecast of *demand* and the 18-month *security and adequacy* assessment and to produce the Outlook as described below. This procedure specifies the information required and provides *market participants* and *connection applicants* with the specific steps to submit such information to the *IESO*.

## 1.2 Scope

This procedure is intended to provide *market participants* and *connection applicants* with a summary of the steps and interfaces among *market participants*, *connection applicants*, the *IESO*, and other parties for submitting information for the purpose of conducting the 18-month *security and adequacy* assessment, and for producing the Outlook. Procedural work flows and procedural steps described in this document 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” (Chapter 5, Section 7) and applicable *IESO* policies and standards.

The process relating to the production of the 14-day and 28-day *Security and Adequacy Assessments* is set out in “Market Manual 7: System Operations.”

The overview information in Section 1.3, below, is provided for context purposes only, highlighting the main actions that comprise the procedure as illustrated in Section 2 and described in Section 3.

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

## 1.3 Overview

The *IESO* is responsible for producing a quarterly Outlook that provides an assessment of generation and transmission *adequacy*, for each week of the next 18 months (“Market Rules”, Chapter 5, Section 7).

One of the purposes of the Outlook is to provide *market participants* with input for short-term planning and *outage* scheduling decisions.

With respect to the *adequacy of generation facilities*, the purpose of the Outlook is to identify projected shortfalls in generation capacity and energy and provide information by which *market participants* could act to reschedule *outage* plans to avoid or minimize such projected shortfalls (“Market Rules”, Chapter 5, Section 7.4.2.2).

With respect to the *adequacy of transmission facilities*, the purpose of the Outlook is to identify the possibility of any *security*-related events on the *IESO-controlled grid* that could require contingency planning by *market participants* or by the *IESO* (“Market Rules”, Chapter 5, Section 7.4.2.1).

The purpose of the assessment is also intended to allow the *IESO* to meet its obligations to relevant *standards authorities* so as to enable them to assess the status of *IESO-controlled grid security and adequacy* (“Market Rules”, Chapter 5, Section 7.4.2.3).

In order to conduct its assessments and prepare the associated reports, the *IESO* requires *market participants* and *connection applicants* to provide the information set out in this procedure (“Market Rules”, Chapter 4, Sections 6.1.6, 7.1.2, Chapter 5, Section 7.5.1, and Chapter 10, Section 8.7.2). Two types of information will be provided by *market participants* and *connection applicants* to support the production of the Outlook:

Static information (impedance, static ratings, etc.) that changes infrequently (“Market Rules”, Chapter 4, Sections 6.1.6 and 7.1.2).

Dynamic information (energy forecasts, outage forecasts, etc.) that changes throughout the quarter (“Market Rules”, Chapter 5, Section 7.5.1).

Once initial information has been provided, it will only be necessary for *market participants* and *connection applicants* to provide updates as appropriate for the specific information type. Changes to static information should be provided when such changes occur throughout the quarter, while dynamic information updates need only be provided prior to conducting the quarterly assessment. Information submitted each quarter should include information for relevant *facilities* planned in the upcoming 18-month period. Information will be due on the first day of each calendar quarter.

The *IESO* shall submit a copy of the Outlook to the *Ontario Energy Board (OEB)* and the *Minister* and subsequently *publish* the Outlook on the *IESO* Web site. Where the Outlook contains *confidential information* relating to a *market participant*, it will submit this Outlook to the *OEB* and the *Minister* on a confidential basis and *publish* a redacted public version, which does not contain such *confidential information*. The *IESO* may include in the public version of the Outlook *confidential information* pertaining to a *market participant* only after obtaining written permission from that *market participant* (“Market Rules”, Chapter 3, Section 5.3.1.3b).

## 1.4 Market Participant Information

Some of the information related to the 18-Month Outlook will be provided by *market participants* via the market entry process, as detailed in “Market Manual 1: Market Entry, Maintenance & Exit” (“Market Rules”, Chapter 5, Section 7.5.1). Other information will be submitted by *market participants* as part of the *outage* management process using the Integrated Outage Management System (IOMS) tool, as detailed in “Market Manual 7: System Operations” (“Market Rules”, Chapter 5, Section 7.5.1). The remaining information will be submitted to the *IESO* using the forms associated with this procedure, listed in Appendix A (“Market Rules”, Chapter 5, Section 7.5.1, and Chapter 10, Section 8.7.2).

The forecasts and assessments process will access the *outage* information already submitted using the IOMS tool and the information provided via the market entry process. When submitting the information required by this procedure, as outlined in the associated forms listed in Appendix A, *market participants* must also ensure that, on the due date for each quarterly Outlook, the short-term *outage* information relating to their *facilities* within the IOMS tool is up to date (“Market Rules”, Chapter 5, Section 7.5.1). *Market participants* must also keep up-to-date, at all times, the registration information they submitted to the *IESO* as part of the market entry process (“Market Rules”, Chapter 5, Section 7.5.1).

The *IESO* will assign an appropriate confidentiality level to all information received from *market participants* (“Market Rules”, Chapter 3, Section 5.4.1), and will obtain prior written permission from the *market participant* before *publishing* confidential information that is specific to that *market participant* (“Market Rules”, Chapter 3, Section 5.3.1.3b.).

The forms listed in this procedure are not to be used for submitting any information required by the *IESO* to prepare the 28-day and 14-day forecasts and assessments. Separate submission requirements are available for these other forecast and assessment processes, as detailed in the relevant market procedure.

### 1.4.1 Plans for Retired, New or Modified Facilities

In preparing the 18-Month Outlook, there is a need to incorporate retired, new or modified *facilities* which are likely to impact the *reliability* of the *IESO-controlled grid*, which have not been identified to the *IESO* through the Connection Assessment and Approval process, and which have estimated in-service or retirement dates that fall within the 18-month period under study.

*Market participants* 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 (“Market Rules”, Chapter 5, Section 7.5.1 and Chapter 10, Section 8.7.2).

### 1.4.2 New or Modified Connections

In preparing the 18-Month Outlook, there is a need to incorporate relevant new or modified connections to the *IESO-controlled grid*, which have been identified to the *IESO* through the Connection Assessment and Approval process and which have estimated in-service dates that fall within the 18-month period under study.

*Connection applicants* planning to establish new or modified connection(s) to the *IESO-controlled grid*, will be guided by “Market Manual 2: Market Administration, Part 2.10: Connection Assessment and Approval” to submit information related to the planned new or modified connection(s), using the forms listed in Appendix A of that procedure (“Market Rules”, Chapter 4, Section 6.1.6).

Additionally, *connection applicants* are required to submit the information required by this procedure using the forms listed in Appendix A, as relevant (“Market Rules”, Chapter 5, Section 7.5.1).

### 1.4.3 Timing

Submissions of information related to *generators, transmitters and connection applicants* specified in this procedure must be delivered to the *IESO*, by the first day of each calendar quarter (January 1, April 1, July 1, and October 1), (“Market Rules”, Chapter 5, Section 7.5.1).

The 18-month period for which *market participants* will submit the information required by this procedure will be as follows:

- Q1 – ‘current year’ Outlook. Information due on January 1, ‘current year’. The 18-month period will be March, ‘current year’ through August, ‘current year’+1, where ‘current year’ is the year the information submittal process is completed (e.g. process completed January 1, 2009 means the 18-month period from March 2009 to August 2010);
- Q2 – ‘current year’ Outlook. Information due on April 1, ‘current year’. The 18-month period will be June, ‘current year’ through November, ‘current year’+1, where ‘current year’ is the year the information submittal process is completed (e.g. process completed April 1, 2009 means the 18-month period from June 2009 to November 2010);
- Q3 – ‘current year’ Outlook. Information due on July 1, ‘current year’. The 18-month period will be September, ‘current year’ through February, ‘current year’+2, where ‘current year’ is the year the information submittal process is completed (e.g. process completed July 1, 2009 means the 18-month period from September 2009 to February 2011);
- Q4 – ‘current year’ Outlook. Information due on October 1, ‘current year’. The 18-month period will be December, ‘current year’ through May, ‘current year’+2, where ‘current year’ is the year the information submittal process is completed (e.g. process completed October 1, 2009 means the 18-month period from December 2009 to May 2011);

The study period and information submittal due date are also specified on the information submittal forms.

## 1.5 Information to be Contained in the Outlook

When completed, the 18-Month Outlook will be made available to the public via the *IESO* public web site. The information in the Outlook will be presented in aggregate form, where necessary for confidentiality purposes, and will include, as appropriate for the next 18 months:

- forecast Ontario electricity *demand*, by week (“Market Rules”, Chapter 5, Section 7.1.1.4). A summary of the methodology used to prepare the forecast will be provided in a separate document to be posted with the Outlook (“Market Rules”, Chapter 5, Section 7.1.3);
- assessment of the *adequacy* of relevant existing and planned generation and transmission *facilities* and other related resources (“Market Rules”, Chapter 5, Section 7.4.2);
- changes in capability of the *integrated power system*, as reflected by interface limits and the conditions under which they impact on the efficiency of the *IESO-administered markets* (“Market Rules”, Chapter 5, Section 7.4.2);
- the capability of the *integrated power system* to accommodate imports and exports of power (“Market Rules”, Chapter 5, Section 7.4.2);

- a description and assessment of relevant options identified by *market participants* in response to *IESO* requests for proposal (“Market Rules”, Chapter 5, Section 7.4.2);
- forecasts, by week, of Ontario electricity *demand*, changes in generation capability and reserve margins due to planned generation *outages* and other factors, and changes in transfer capability and in import and export capability (as reflected by changes in the operating security limits) due to planned transmission *outages* and other factors (“Market Rules”, Chapter 5, Section 7.4.2); and
- assessments of generation and transmission *adequacy*, and any impacts of *IESO* market efficiency due to the above changes (“Market Rules”, Chapter 5, Section 7.4.2).

## 1.6 Roles and Responsibilities

Responsibility for carrying out the procedure for providing 18-Month Outlook related information is shared among:

- **Generators**, which are responsible for:
  - providing initial generation information and changes to initial information (“Market Manual 1: Market Entry, Maintenance & Exit”), (“Market Rules”, Chapter 4, Sections 6.1.6, 7.1.2);
  - providing dynamic forecast information and new or modified *facility* plans on a quarterly basis (IMO\_FORM\_1484 and IMO\_FORM\_1230 forms listed in Appendix A of this procedure and inputs into the Integrated Outage Management System), (“Market Rules”, Chapter 5, Section 7.5.1);
- **Transmitters**, which are responsible for:
  - providing initial transmission information and changes to initial information (“Market Manual 1: Market Entry, Maintenance & Exit”), (“Market Rules”, Chapter 4, Sections 6.1.6, 7.1.2);
  - providing dynamic forecast information and new or modified *facility* plans on a quarterly basis (IMO\_FORM\_1484 form listed in Appendix A of this procedure and inputs into the Integrated Outage Management System), (“Market Rules”, Chapter 5, Section 7.5.1), (“Market Rules”, Chapter 10, Section 8.7.2);
- **Connection applicants**, which are responsible for:
  - providing initial and dynamic information required via Connection Assessment and Approval process (“Market Manual 2: Market Administration, Part 2.10: Connection Assessment and Approval”), (“Market Rules”, Chapter 4, Sections 6.1.6, 7.1.2); and
  - providing dynamic information for the new or modified connections to the *IESO-controlled grid*, which fall within the 18-month study period on a quarterly basis (forms listed in Appendix A of this procedure, as relevant (“Market Rules”, Chapter 4, Section 7.1.2, Chapter 5, Section 7.5.1). For *generation facilities*, IMO\_FORM\_1230 must be completed. For *transmission facilities*, IMO\_FORM\_1484 must be completed).
- The **IESO**, which is responsible for (“Market Rules”, Chapter 5, Section 7):
  - receiving submitted information;
  - conducting the quarterly forecasts and assessments; and

- *publishing* the Outlook.

## 1.7 Contact Information

As part of the 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 the 18-Month Outlook, this contact will most likely be the Forecasts – 18 Month and 10 Year Forecast Assessment Market Contact Type as indicated in the Customer Data Management System (CDMS) tool. (MP Contacts screens). If a *market participant* has not identified a specific contact, the *IESO* will seek to contact the Main Contact in CDMS that is established during the participant authorization process. The *IESO* will seek to contact these individuals for activities within this procedure, unless alternative arrangements have been established between the *IESO* and the *market participant*. For more information on CDMS and the participant authorization process see “Market Manual 1: Market Entry, Maintenance and Exit, Part 1.1: Participant Authorization, Maintenance and Exit.”

If the *market participant* wishes to contact the *IESO*, the *market participant* can contact *IESO* Customer Relations via email at [customer.relations@ieso.ca](mailto:customer.relations@ieso.ca) or via telephone, mail or courier to the numbers and addresses given on the *IESO*'s Web site ([www.ieso.ca](http://www.ieso.ca) - or click on 'CONTACT US' to go to the 'CONTACT US' page). If *IESO* Customer Relations is closed, telephone messages or emails may be left in relevant voice or electronic *IESO* mailboxes, which will be answered as soon as possible by *IESO* Customer Relations staff.

The standard forms to be used for data submission for this procedure are provided in Appendix A. These forms are available for downloading on the *IESO*'s public website. These forms must be transmitted to the *IESO* via e-mail to the address specified on them ([forecasts.assessments@ieso.ca](mailto:forecasts.assessments@ieso.ca) (“Market Rules”, Chapter 5, Section 7.5.1). However, the alternate method for the submittal of required information is to send electronic files on CD, or other *IESO* approved media via mail or courier by using the appropriate address provided on the forms or on the *IESO*'s public website. The *IESO* must be notified in advance by **e-mail** of the intention to use the alternate method. All correspondence relating to this procedure shall identify the subject: **18-Month Outlook Related Information**.

– End of Section –

## 2. Procedural Work Flow

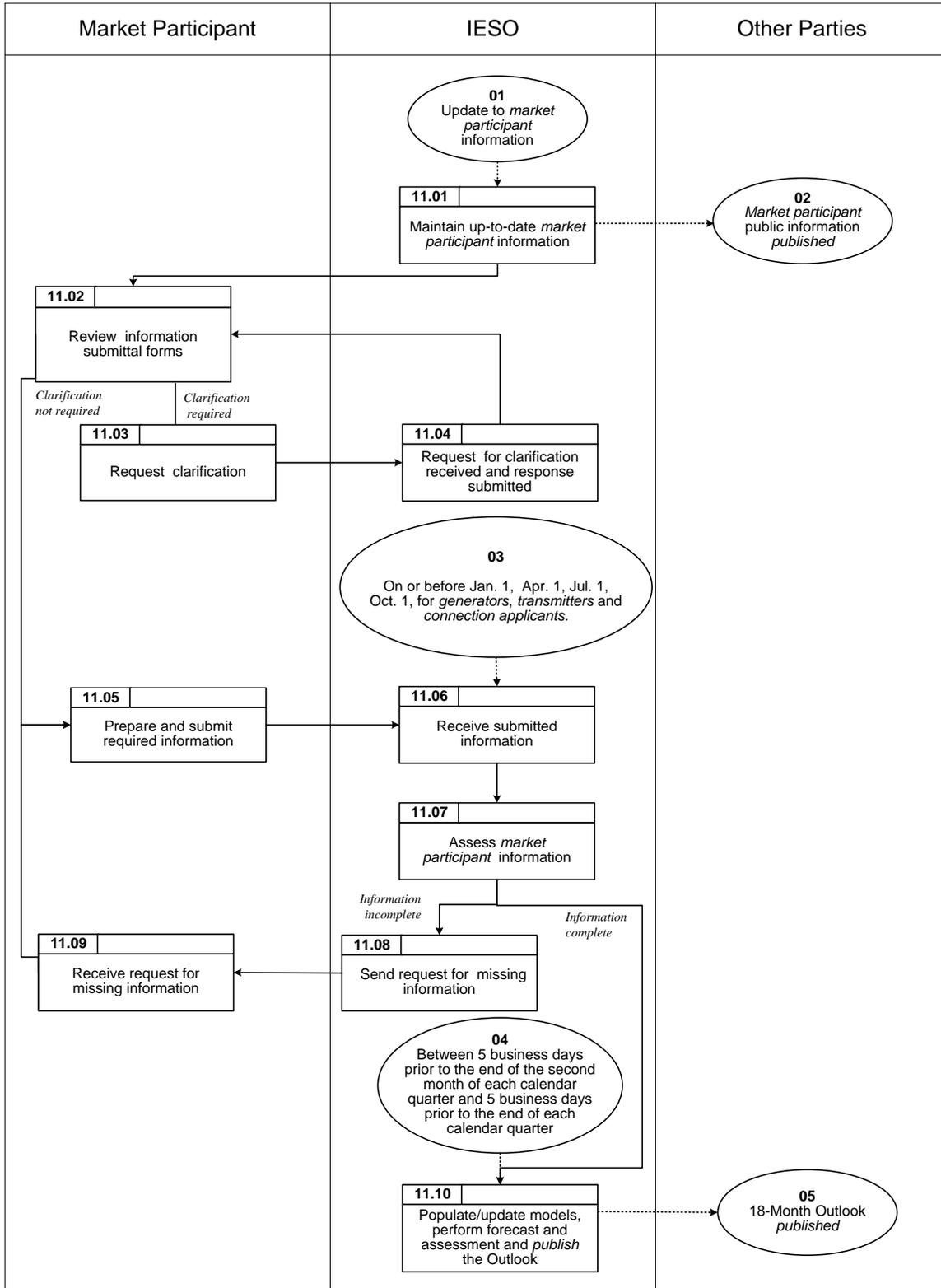
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Figure 2–1 represents the flow of work and information related to providing 18-Month Outlook related information shared among the *IESO*, *market participants*, and other parties.

The steps illustrated in the procedural work flow diagrams are described in detail in Section 3.

**Table 2–1: Legend for Work Flow Diagrams**

<b>Legend</b>	<b>Description</b>
Oval	An event that triggers task or that completes task. Trigger events and completion events are numbered sequentially within the procedure (01 to 99).
Task Box	Shows reference number, party responsible for performing task (if “other party”), and task name or 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 external parties.
Solid vertical line	Shows linkage between tasks.
Broken line	Links trigger events and completion events, preceding or succeeding task.



**Figure 2–1: Work Flow for Submittal of the 18-Month Outlook Related Information**

**– End of Section –**

## 3. Procedural Steps

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This section contains detail on the tasks (steps) that comprise the 18-Month Outlook information requirements and Outlook procedure. The steps in the following tables are illustrated in Section 2.

The table contains seven columns, as follows:

### **Ref**

The numerical reference to the task.

### **Task Name**

The task name as identified in Section 2.

### **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 are specified.

### **Completion events**

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

**Table 3–1: Procedural Steps For Submittal of the 18-Month Outlook Related 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>
11.01	Maintain up-to-date <i>market participant</i> information.	The <i>IESO</i> maintains a <i>published</i> list of current and anticipated <i>market participants</i> , including contact information, mailing addresses, etc. and all updated forms required for information submittal.	As <i>market participant</i> information is updated.	List of <i>market participants</i> and all required forms.	<i>IESO</i> public web site.	<i>Market participant</i> list and all forms made available to <i>market participants</i> .
11.02	Review information submittal forms.	The <i>market participant</i> reviews the <i>IESO</i> information submittal forms.	Following Step 11.01.	None	None	Information submission forms and obligations reviewed and understood or require clarification.
11.03	Request clarification.	The <i>market participant</i> requests clarification from the <i>IESO</i> of any portion of the information request that requires clarity.	Following Step 11.02, if required.	Questions with respect to the information request.	By e-mail, via <i>IESO</i> Customer Relations.	Request for clarification received by <i>IESO</i> Customer Relations.
11.04	Request for clarification received and response submitted.	The <i>IESO</i> receives the clarification request and responds to the <i>market participant</i> . The <i>market participant</i> returns to Step 11.02.	Following Step 11.03, if required.	Response to Clarification Request	By e-mail, via <i>IESO</i> Customer Relations.	Clarification of information request sent to <i>market participant</i> .

**Table 3–1: Procedural Steps For Submittal of the 18-Month Outlook Related 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>
11.05	Prepare and submit required information.	Each calendar quarter, 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> .	Following Step 11.02.	Required information, as appropriate: Generator Information Submittal Form (IMO-FORM-1230) Plans for New or Modified Facilities Information Submittal Form (IMO-FORM-1484)	Via e-mail (preferred), or send electronic files via conventional mail or courier.	Required information is sent to the <i>IESO</i> .
11.06	Receive submitted information.	The <i>IESO</i> receives the required information from the <i>market participant</i> .	On or before the first day of each quarter (Jan.1, Apr. 1, Jul. 1, Oct.1).	Completed Generator Information Submittal Form (IMO-FORM-1230) and Plans for New or Modified Facilities Information Submittal Form (IMO-FORM-1484)	Via e-mail (preferred), or send electronic files via conventional mail or courier.	Required information received from <i>market participant</i> .

**Table 3–1: Procedural Steps For Submittal of the 18-Month Outlook Related 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>
11.07	Assess <i>market participant</i> information.	The <i>IESO</i> assesses the information provided by the <i>market participants</i> for completeness.	Following Step 11.06.	None	None	Information completeness determined. Missing information identified.
11.08	Send request for missing information (if required).	The <i>IESO</i> sends a request to the <i>market participant</i> for the incomplete information.	Following Step 11.06, if information is incomplete.	Request for Additional Information	By e-mail.	Request for missing information sent to <i>market participant</i> .
11.09	Receive request for missing information.	The <i>market participant</i> receives the request for the missing information and returns to Step 11.05.	Following Step 11.08, if information is incomplete or unreasonable.	None	None	Request for missing information received.

**Table 3–1: Procedural Steps For Submittal of the 18-Month Outlook Related 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>
11.10	Populate/update models, perform forecast and assessment, and <i>publish</i> the Outlook.	<p>The <i>IESO</i> utilizes the <i>market participant</i> information to populate and/or update models, perform the quarterly 18-month forecast and assessment, and <i>publish</i> the associated Outlook.</p> <p>If the <i>IESO</i> intends to include in the Outlook <i>confidential information</i> regarding a <i>market participant</i>, other than as an unidentifiable component of aggregated information, the <i>IESO</i> must notify that <i>market participant</i> of its intent to <i>publish</i> the <i>confidential information</i> and give the <i>market participant</i> a reasonable opportunity of making representation as to why such <i>confidential information</i> should not be included in the Outlook. The <i>IESO</i> must obtain consent to <i>publish confidential information</i>. If the <i>market participant</i> does not give the <i>IESO</i> consent to <i>publish</i> such <i>confidential information</i>, it is removed from the Outlook prior to publication.</p> <p>A complete Outlook, including this <i>confidential information</i>, may be provided separately to the <i>OEB</i> and the <i>Minister</i> on a confidential basis.</p>	Following Step 11.07 and prior to the publication date for the quarterly Outlook.	18-Month Outlook.	Electronic publication on <i>IESO</i> public web site.	18-Month Outlook <i>published</i> .

– End of Section –



## Appendix A: Forms

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

<b>Form Name</b>	<b>Form Number</b>
Generator Information Submittal Form	IMO-FORM-1230
Plans for New or Modified Facilities Information Submittal Form for 18-Month Outlook	IMO-FORM-1484

- End of Section -

## References

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<b>Document ID</b>	<b>Document Title</b>
MDP_RUL_0002	Market Rules
MDP_PRO_0014	Market Manual 1: Market Entry, Maintenance and Exit, Part 1.1: Participant Authorization, Maintenance and Exit
MDP_PRO_0016	Market Manual 1: Market Entry, Maintenance and Exit, Part 1.2: Facility Registration, Maintenance and De-Registration
MDP_MAN_0002	Market Manual 2: Market Administration, Part 2.0: Market Administration Overview
MDP_PRO_0048	Market Manual 2: Market Administration, Part 2.10: Connection Assessment and Approval
IMP_MAN_0012	Market Manual 7: System Operations Part 7.0: System Operations Overview

- End of Document -