

ISO Rules
Part 300 System Reliability and Operations
Division 302 Transmission Constraint Management
Section 302.1 Real Time Transmission Market
Constraint Management



Applicability

1 Section 302.1 applies to:

- (a) a **market participant**; and
- (b) the **ISO**.

Requirements

Real Time Transmission Market Constraint Mitigation

2(1) Subject to subsection 3, the **ISO** must comply with the following procedures in the following sequence to mitigate a **transmission market constraint** in the present, real time:

- (a) taking into account the **constraint effective factors**, determine the **pool assets** that would be effective in mitigating the **transmission market constraint** and apply the appropriate procedure set out in this subsection 2(1) to those effective **pool assets**;
- (b) ensure that any **pool assets** effective in mitigating the **transmission market constraint** are not generating MW above their **maximum capability**, by cancelling any related **directives**;
- (c) curtail by **directives**, any **downstream constraint side** service under **ISO tariff** rate schedules *Rate XOS 1 Hour* and *Rate XOS 1 Month* and any **upstream constraint side** service under **ISO tariff** rate schedule *Rate IOS*, -that are effective in mitigating the **transmission market constraint**;
- (d) curtail by **directives**, any **loads** receiving service under **ISO tariff** rate schedules *Rate DOS 7 Minutes*, *Rate DOS 1 Hour* and *Rate DOS Term* at the **downstream constraint side** of the **transmission market constraint**, that are effective in mitigating the **transmission market constraint**;
- (e) issue a **dispatch** to any **pool asset** that is under contract with the **ISO** to provide **transmission must-run** and that is effective in mitigating the **transmission market constraint** at the **downstream constraint side**;
- (f) issue a **directive** for **transmission-must run** to any **pool asset** that is not under contract with the **ISO** to provide **transmission must-run** and that is effective in mitigating the **transmission market constraint** at the **downstream constraint side**;
- (g) issue **directives** to curtail any **pool assets** that are effective in mitigating the **transmission market constraint** at the **upstream constraint side** using the following additional procedures:
 - (i) the **ISO** must curtail using the energy market **merit order** with the highest priced **offer that is in merit offer** from the **pool asset** effective in mitigating the **transmission market constraint** being curtailed first, followed by the **pool asset** with the next highest priced **offer that is in merit offer**, if necessary, during the remainder of the then current **settlement interval** and the next ~~two-(2)~~ **settlement intervals**;
 - (ii) if there is a need to curtail ~~two-(2)~~ or more such **pool assets** having equally priced **offers**, then the **ISO** must issue **directives** to the **pool assets** to curtail using a pro-rata methodology; and

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- (iii) if the **transmission market constraint** persists on a continuous basis for longer than the remainder of the then current **settlement interval** and the next ~~two (2)~~ **settlement intervals**, then the **ISO** must reallocate the required curtailment, using a pro-rata methodology, to all pool assets having offers that are in merit that are effective in mitigating the transmission market constraint; ~~methodology, to all pool assets having in merit offers that are effective in mitigating the transmission constraint;~~ and
- and
- (h) curtail by **directives** any **loads** receiving service under **ISO tariff** rate schedule *Rate DTS* at the **downstream constraint side** of the **transmission market constraint**, if so required by the **reliability** criteria, using the following procedures:
- (i) the **ISO** must allocate the **load** curtailment using the energy market **merit order** with the lowest priced effective **bid** being curtailed first, followed by the next lowest priced effective **bid**, if necessary; and
- (ii) if there is a need to curtail **loads** with equal price **bids**, or there are no **bids** remaining, then the **ISO** must curtail using a pro-rata methodology.
- (2) The **ISO** must comply with the following procedures in order to restore the energy balance to the **interconnected electric system**:
- (a) ~~where the procedures set out in subsections subsections 2(1)(e) or (2(1)(f) are used, issue~~ **dispatches** for **dispatch down service** in accordance with ~~sectionSection~~ Section 204.2 of the **ISO rules**, *Issuing Dispatches for Dispatch Down Service*; and
- (b) except where the procedures set out in subsection 2(1)(e) and ~~(2(1)(f)~~ are used:
- (i) in circumstances where the **ISO** has notice of a **transmission market constraint** that is anticipated to be of a significant duration and magnitude, as determined by the **ISO** acting reasonably, issue a **dispatch** to any **pool asset** that is effective in restoring the energy balance to the **interconnected electric system** and that is under contract with the **ISO** to provide **transmission must-run** in accordance with ~~sectionSection~~ Section 205.8 of the **ISO rules**—, *Transmission Must-Run* and ~~sectionSection~~ Section 301.2 of the **ISO rules**—, *ISO Directives*, and issue **dispatches** for **dispatch down service** in accordance with ~~sectionSection~~ Section 204.2 of the **ISO rules**—, *Issuing Dispatches for Dispatch Down Service*; and
- (ii) in all other circumstances, or where necessary to supplement the volume **dispatched** for **transmission must-run** in subsection 2(2)(b)(i), issue **dispatches** for **transmission constraint rebalancing**, in accordance with the energy market **merit order**, and make payment to a **pool participant** with a **source asset** that has provided energy for **transmission constraint rebalancing** in accordance with subsection 7(1) of ~~sectionSection~~ Section 103.4 of the **ISO rules**—, *Power Pool Financial Settlement*..
- (3) With regard to any of the procedures set out in subsection 2(1) that involve **pool asset** or **load** curtailment, if the **pool asset** or **load** is supplying both **ancillary services** and energy production, then the **ISO** must first curtail **ancillary services** before energy production.
- (4) When a **transmission market constraint** has activated or is expected by the **ISO** to activate a **remedial action scheme**, then after the **ISO** has ensured that the **interconnected electric system** is operating in a safe and reliable mode, the **ISO** must recommence the procedural sequence set out in subsection 2(1) to manage the **transmission market constraint**.

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Additional Real Time Constraint Management Procedures

- 3** As the circumstances may warrant, the **ISO** may take into account the following alternative or complementary procedures to mitigate any present, real time **transmission market constraint**:
- (a) if the result of following the procedures set out in subsection 2(1)(g)(i) will be to curtail any **pool asset** below its **minimum stable generation** level but the **ISO** expects the **transmission market constraint** to last only a short duration, then the **ISO** by **directive** may curtail the **pool asset** to above or at the **minimum stable generation** level of that **pool asset**;
 - (b) in circumstances where abnormal operating or market conditions exist, the **ISO** acting reasonably may, in implementing mitigation measures to address a **transmission market constraint**, take procedural steps not listed in subsection 2(1) if those steps are substantially consistent with **good electric industry operating practice** and the duties of the **ISO** under the **Act** to direct the safe, reliable and economic operation of the **interconnected electric system**;
 - (c) the abnormal conditions referred to in subsection 3(b) include circumstances of unusual natural risks to the **interconnected electric system**, and issues raised by a unique real time system configuration or **reliability** concerns stemming from voltage or **reactive power** effects;
 - (d) in mitigating a **transmission market constraint**, the **ISO** must follow the procedural sequence set out in subsection 2(1) and any more specific and complementary **ISO rules** applicable for a given regional area of the **interconnected electric system**, unless real time operating conditions change such that following the specified sequence would put the **ISO** in contravention of any **reliability standard** requirement by failing to achieve compliance within the operating limits or required response time specified in that **reliability standard**; **and**
 - (e) if the **ISO** alters the procedural sequence as set out in subsection 2(1), or takes alternate mitigating actions because of the circumstances referred to in subsection 3(b) or 3(d) above, then once the **ISO** is assured that the **interconnected electric system** is operating in a safe and reliable mode, the **ISO** must recommence the procedural sequence set out in subsection 2(1).

Reporting

- 4(1)** The **ISO** must use reasonable efforts to publish, as near to real time as possible, information on the location of **transmission market constraints** and costs of resolving these constraints.
- (2)** The **ISO** must monitor and publicly report on the costs incurred as a result of mitigating **transmission market constraints** on an annual basis.

Revision History

Effective	Description
<u>20xx-xx-xx</u>	<u>Revision to clarify “transmission constraint” as “transmission market constraint” and administrative revisions.</u>
2015-11-26	Revisions to subsections 2(1) and 2(2). Amendment to numbering references in subsection 3(a). Addition of subsection 4 “Reporting”.
2013-01-08	Previously defined terms have been un-defined and the words have been un-bolded.

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	Reference to section 6.3.6.3 <i>Determining Dispatch Down Service Dispatch Quantity</i> has been replaced with section 204.2 <i>Issuing Dispatches for Dispatch Down Service</i> .
2012-03-26	Initial release