

Appendix B
to
Notice of Amendments to Codes and Notice of Proposal to Amend a Code
August 26, 2013
EB-2011-0043

Final Amendments to the Distribution System Code

The Distribution System Code is amended by adding new section 8 as follows:

8. Regional Planning

8.1 Definitions

8.1.1 In this section 8:

“Integrated Regional Resource Plan” means a document prepared by the OPA that identifies the appropriate mix of investments in one or more of conservation and demand management, generation, transmission facilities or distribution facilities in order to address the electricity needs of a region in the near- (up to 5 years), mid- (5 to 10 years), and long-term (more than 10 and up to 20 years);

“integrated regional resource planning process” means a planning process led by the OPA for the purpose of determining the appropriate mix of investments in one or more of conservation and demand management, generation, transmission facilities or distribution facilities in order to address the electricity needs of a region in the near- (up to 5 years), mid- (5 to 10 years), and long-term (more than 10 and up to 20 years);

“lead transmitter” means a transmitter that is leading a regional planning process or is involved in a scoping assessment or an integrated regional resource planning process in a region;

“needs assessment” means a process led by a lead transmitter in accordance with section 3C of the Transmission System Code to determine if regional planning is required for a region;

“region” means an area that has been designated as such by a lead transmitter, in consultation with the OPA, under section 3C.2.2(a) of the Transmission System Code for regional planning purposes;

“Regional Infrastructure Plan” means a document prepared by the lead transmitter leading a regional infrastructure planning process that identifies investments in transmission facilities, distribution facilities or both that should be developed and implemented on a coordinated basis to meet the electricity infrastructure needs within a region;

“regional infrastructure planning process” means a planning process led by a lead transmitter in accordance with section 3C of the Transmission System Code for the purpose of determining the investments in transmission facilities, distribution facilities or both that should be developed and implemented on a coordinated basis to meet the electricity infrastructure needs within a region;

“regional planning” means a planning process involving licensed transmitter(s), licensed distributor(s), and the OPA for the purpose of determining whether a Regional Infrastructure Plan and/or an Integrated Regional Resource Plan is required for a region and, where required, developing or updating a Regional Infrastructure Plan and/or an Integrated Regional Resource Plan;

“scoping assessment” means a process led by the OPA to determine the form of regional planning process (regional infrastructure planning process or integrated regional resource planning process) that is required for a region; and

“transmission-connected distributor” means a distributor whose distribution system is connected to the transmission system of a licensed transmitter.

8.2 Participation in Regional Planning

8.2.1 A transmission-connected distributor shall participate in regional planning upon being requested to do so by the transmitter that is leading a regional infrastructure planning process or by the OPA that is leading a scoping assessment or an integrated regional resource planning process for the region within which the distributor’s licensed service area is located, in whole or in part, and shall do so to such extent and in such manner as may reasonably be required by the lead transmitter or the OPA.

8.2.2 An embedded distributor shall participate in regional planning upon being requested to do so by its host distributor or by the lead transmitter for the region within which the embedded distributor’s licensed service area is located, in whole or in part, and shall do so to such extent and in such manner as may reasonably be required by the host distributor or the transmitter.

8.3 Provision of and Requests for Information

8.3.1 A transmission-connected distributor shall provide the following to the lead transmitter for the region within which the distributor’s licensed service area is located, in whole or in part:

- (a) such information as the lead transmitter may from time to time reasonably require to support regional planning, and shall do so within 60 days of receipt of the lead transmitter’s request; and
- (b) prompt notice of any developments in that part of the region in which its licensed service area is located that may trigger the need

for investments in transmission facilities, distribution facilities or both, as applicable, or that may otherwise reasonably be expected to affect the lead transmitter's conduct of a needs assessment for the region.

Where the distributor is a host distributor, the information provided to the lead transmitter shall reflect any information provided to it by any of its embedded distributors under section 8.3.4.

- 8.3.2 A transmission-connected distributor shall provide the OPA with such information as the OPA may from time to time reasonably require, for the purpose of supporting regional planning, and shall subject to section 8.3.3 do so within 30 days of receipt of the OPA's request. Where the distributor is a host distributor, the information provided to the OPA shall reflect any information provided to it by any of its embedded distributors under section 8.3.4.
- 8.3.3 Where a transmission-connected distributor believes that it cannot meet the 30-day timeline referred to in section 8.3.2, the distributor and the OPA may agree to a longer timeline. In such a case, the distributor shall so notify the Board in writing. The notice shall indicate the region in question, the reasons for being unable to meet the 30-day timeline and the extended timeline that has been agreed to between the distributor and the OPA.
- 8.3.4 An embedded distributor shall provide its host distributor with the following:
- (a) such information as may from time to time reasonably be required by the host distributor to support regional planning, and shall do so within 15 days of receipt of the request for information; and
 - (b) prompt notice of any developments in that part of the region in

which its licensed service area is located that may trigger the need for investments in transmission facilities, distribution facilities or both, as applicable, or that may otherwise reasonably be expected to affect a lead transmitter's conduct of a needs assessment for the region.

8.3.5 Where a transmission-connected distributor provides information to a lead transmitter or the OPA under section 8.3.1 or 8.3.2 in respect of a region, the distributor shall also provide the same information to all other transmission-connected distributors in the region. Each host distributor that receives information under this section shall provide that information to each of its embedded distributors.

8.3.6 Where, for the purpose of supporting an application proposed to be filed with the Board, a distributor requires information related to the status of regional planning for a region, including any Regional Infrastructure Plan that is being developed for the region, the transmission-connected distributor or embedded distributor shall request a letter confirming the status from the lead transmitter for the region no less than 60 days before the distributor requires the letter.

8.3.7 Where a needs assessment determines that the participation of a distributor in a regional planning process is not necessary, the distributor shall request a needs assessment report from the lead transmitter confirming that its involvement is not required no less than 10 days before the embedded distributor requires the report for the purpose of supporting an application proposed to be filed with the Board.

8.4 Monitoring and Reporting

8.4.1 Where a Regional Infrastructure Plan identifies the need for a distributor to

make an investment in its distribution system, the distributor shall, upon request by the lead transmitter or host distributor or by a distributor referred to in section 8.4.2, provide an update regarding the status of the investment, and shall do so within 30 days of receipt of the request. Where the distributor is a host distributor, the letter shall reflect any investment update(s) provided to it by any of its embedded distributor(s).

8.4.2 Where a distributor has agreed to conduct the review referred to in section 3C.3.1(a) of the Transmission System Code, the distributor shall provide a report to the lead transmitter setting out the status of the investments set out in the applicable Regional Infrastructure Plan within 60 days of receipt of a request from the transmitter to do so.

8.5 Transition

8.5.1 A transmission-connected distributor shall, within 45 days of receipt of a request from a lead transmitter, provide the transmitter with a letter identifying whether the distributor foresees a potential need for additional transmission connection capacity to support the needs of the distributor's distribution system over the next five years. Where the distributor is a host distributor, the letter shall reflect any information provided to it by any of its embedded distributors under section 8.5.3.

8.5.2 Where a transmission-connected distributor provides a letter to a lead transmitter under section 8.5.1 in respect of a region, the distributor shall also provide the same information to all other transmission-connected distributors in the region. Each host distributor that receives a letter under this section shall provide that letter to each of its embedded distributors.

8.5.3 An embedded distributor shall, within 15 days of receipt of a request from its host distributor, provide its host distributor with a letter identifying

whether the embedded distributor foresees a potential need for additional transmission capacity to support the needs of the embedded distributor's distribution system over the next five years.

8.6 Continuing Obligations Re Distribution System

8.6.1 Nothing in this section 8 shall limit any obligation of the distributor to maintain the reliability and integrity of its distribution system or to meet load growth within its licensed service area.