

ONTARIO ENERGY BOARD

Report to Ministry of Energy and Mines

Review of Ontario's Regional and Bulk Electricity Planning Processes

March 2026



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1. EXECUTIVE SUMMARY

In June 2025, the Ontario government released its Integrated Energy Plan (IEP Directive) [*Energy for Generations: Ontario's Integrated Plan to Power the Strongest Economy in the G7*](#) and the Minister of Energy and Mines (Minister) issued an [*implementation Directive*](#) (Minister's Directive) to the Ontario Energy Board (OEB). Both the IEP and Minister's Directives set clear expectations for coordinated energy planning processes that are responsive and flexible to the pace of growth. Implementing the actions set out in this report will increase the efficiency and effectiveness of planning for an electricity system that will reliably and cost effectively supply Ontario's growing demand for electricity.

The OEB has undertaken a review of the regional and bulk planning processes, as required by the Minister's Directive. This review considered the responsiveness of Ontario's regional and bulk electricity planning processes as it relates to the pace of electricity demand growth, especially in high growth regions.

To carry out this review, the OEB engaged with a variety of stakeholders including electricity distributors, Hydro One Networks Inc., the Independent Electricity System Operator (IESO), wires and non-wires solution providers, communities and municipal and consumer representatives.

As a result of the OEB's review of the regional planning process, the OEB will:

- Establish terms of reference for regional planning Technical Working Groups
- Create a forecast standard to drive utility forecast readiness
- Streamline the regional planning process and achieve time savings
- Strengthen the monitoring and implementation of Integrated Regional Resource Plan (IRRP) recommendations
- Create an opportunity for stakeholders to provide written comments between active regional planning cycles.

The OEB's review of the bulk planning process resulted in recommending that the IESO:

- Develop a bulk planning process document
- Publish and maintain a bulk planning dashboard
- Provide quarterly updates on the status and schedules of active bulk planning initiatives.

The OEB expects that implementation of these actions will improve regional and bulk electricity planning processes by clarifying responsibilities, expectations and processes for the benefit of planning participants, municipalities, Indigenous communities and electricity consumers. The OEB further expects process improvements to result in integrated, coordinated and cost-effective plans that will guide prudent investment by Ontario's electricity distributors and transmitters and support Ontario's economic growth.

2. INTRODUCTION

This report responds to Items 4.3 and 4.4 of the Minister's Directive, which requires the OEB to undertake a review, informed by the IESO, of regional and bulk electricity planning processes to identify enhancements. This work will increase the efficiency and effectiveness of planning for an electricity system that will reliably and cost effectively supply Ontario's growing demand for electricity. The OEB is to report back to the Minister by March 31, 2026. The OEB was directed to include recommendations for:

- More closely aligning the regional and bulk planning process with load growth and how load forecasts are determined for the purpose of identifying solutions and recommending system upgrades
- Ways to achieve time savings and to ensure recommendations are responsive to major needs that emerge during a planning cycle, including ways to increase flexibility in the process
- Whether to formalize the bulk planning process consistent with the formalization of the regional planning process while ensuring flexibility to allow for time savings and responsiveness in the planning process.

This report presents the results of the OEB's review and the proposed actions, organized into two main parts: Part I addresses regional planning and Part II addresses bulk planning.

3. STAKEHOLDER CONSULTATION AND FEEDBACK

The OEB's review was supported by three streams of engagement:

- **Distributor Survey:** Insights gathered from 48 electricity distributors through a survey focusing on their experiences with regional planning.
- **Advisory Group Meetings:** Six three-hour meetings with a 21-member advisory group were held between November 2025 and February 2026.
- **Bilateral Meetings:** The OEB participated in meetings with each of the IESO, Hydro One, Enbridge and other advisory group members.

In January 2025, the OEB also held an energy planning workshop for Indigenous communities that encompassed electricity planning, natural gas planning and electric-gas coordination topics.

The advisory group played a particularly supportive role in the OEB's review. The group's members included representatives of electricity and natural gas utilities, wires and non-wires solution providers, consumer groups, municipalities and the IESO.¹ A significant portion of group members had firsthand experience with the regional planning process. The first three advisory group meetings focused on the regional planning process, while the fourth and fifth meetings focused on the bulk planning process. During these meetings, group members shared insights, perspectives and process improvement suggestions. During the sixth meeting, OEB staff presented and received feedback on the OEB's draft recommendations.

The OEB thanks all stakeholders for their participation in this process.

¹ See Appendix B for a list of advisory group members.

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Part I

Regional Planning Review

4. CURRENT REGIONAL PLANNING PROCESS

In 2012, the OEB determined that coordinated infrastructure planning on a regional basis should be required to ensure that regional needs are effectively integrated into utility planning processes. The OEB convened an advisory group to design a structured regional planning process that would help ensure that transmission and distribution investments are optimized on a regional basis. In 2013, the advisory group produced the [*Planning Process Working Group Report to the Board*](#) (2013 Report) which divided Ontario into 21 regions and set out the process for regional infrastructure planning. This report has guided regional planning since 2013. The OEB subsequently formalized the regional planning process, based on the 2013 Report, through amendments to the [*Transmission System Code*](#) (TSC), the [*Distribution System Code*](#) (DSC) and the IESO's [*licence*](#).

The 2013 Report set out the roles and responsibilities for participants in regional planning: the electricity distributors that serve customers in a region, the lead transmitter in the region and the IESO. The representatives of these entities are referred to as a Technical Working Group. Each of the 21 regions has its own Technical Working Group. All Technical Working Group members are engaged at each stage of the regional planning process. The TSC, DSC and IESO licence formally set out the expectations for each stage and the specific roles of the respective entities.

4.1.1. The Regional Planning Cycle

The 2013 Report sets out the four stages that currently make up the regional planning process: a Needs Assessment, a Scoping Assessment, Integrated Regional Resource Planning and Regional Infrastructure Planning. The 2013 Report states that each region should be assessed at least every five years, but that the assessment could be triggered earlier. For example, due to an emergent need brought forward by the lead transmitter, a distributor, customer or the IESO that cannot wait until the next scheduled review. The 2013 Report includes flexibility and options in the process, such that all four stages may not be required each time a region is assessed. The total timeline for all four stages, if required, is 29 months. The portion of the five-year cycle during which any of the four stages are being conducted is sometimes described as the “active planning” period.

Stage 1: Needs Assessment – 60 days

The Needs Assessment, which is led by the lead transmitter, begins with Technical Working Group members providing a 10-year demand forecast. The lead transmitter then carries out a system capability assessment and screens for emerging or future needs in the region. If the assessment identifies needs that warrant regional coordination, the process proceeds with the Scoping Assessment.

Alternatively, instead of determining the need to proceed to a Scoping Assessment, the Needs Assessment might show that no coordinated action is required or that the lead transmitter and one distributor can address the need through a coordinated local solution such as a facility upgrade.

Stage 2: Scoping Assessment – 90 days

The Scoping Assessment, which is led by the IESO, determines the appropriate planning approach for the region. Potential outcomes of a Scoping Assessment include proceeding with Integrated Regional Resource Planning, undertaking Regional Infrastructure Planning and/or developing a Local Plan if no regional coordination is required.

Stage 3: Integrated Regional Resource Planning – 18 months

During the Integrated Regional Resource Planning stage, which is led by the IESO, the Technical Working Group evaluates wires and non-wires options to address regional needs, including local demand management, generation and energy storage, based on a 20-year demand forecast. The IESO also leads multiple stakeholder and community engagement activities. This stage culminates with the production of an IRRP that recommends solutions and required in-service dates to address regional needs. The IESO's licence states that an IRRP must be completed within 18 months. However, it also allows for the timeline to be extended to 24 months. If an extended timeline is required, the IESO must notify the OEB in writing and explain the reasons why an IRRP could not be completed within 18 months.

Stage 4: Regional Infrastructure Planning – 6 months

The Regional Infrastructure Planning stage, which is led by the lead transmitter, advances and refines wires recommendations contained in an IRRP.

The regional planning process is depicted in Figure 1.

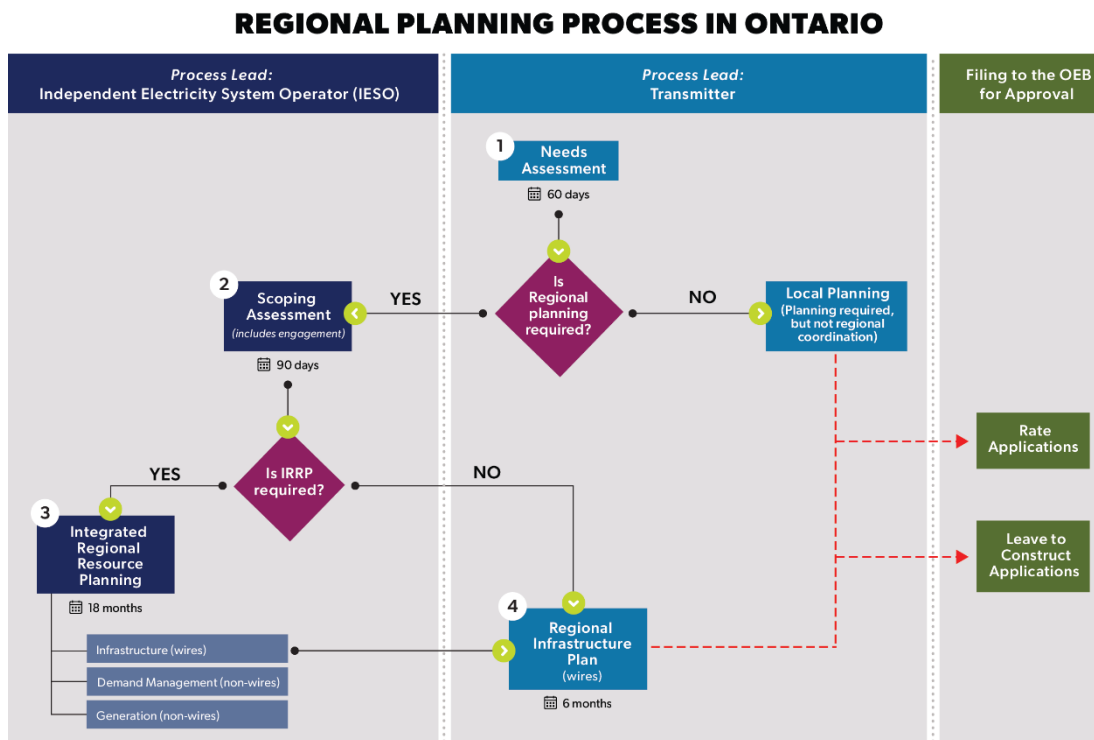


Figure 1. The Regional Planning Process

4.1.2. 2021 Regional Planning Process Review

In 2021, the OEB re-established its advisory group to review the efficiency and effectiveness of the regional planning process. The group identified opportunities to strengthen the process, including improvements to forecasting, stakeholder and community engagement and end-of-life asset management. The advisory group produced the [Load Forecast Guideline for Ontario](#) (Forecast Guideline) in 2022, which sets out approaches for developing the demand forecasts used in regional planning. The advisory group also considered introducing a standardized forecast template; however, it decided to first give utilities time to gain experience using the Forecast Guideline before requiring its use. The advisory group recommended that the Forecast Guideline should be reviewed at least every two years, to enable updates that reflect evolving system conditions.

5. STAKEHOLDER CONSULTATION AND FEEDBACK ON REGIONAL PLANNING

All the engagement activities (described in section three) informed the OEB's understanding of existing challenges and potential improvements in the regional planning process. The key issues raised by stakeholders are summarized below.

5.1.1. Increase consistency of regional planning triggering

Stakeholders noted that the lack of consistent criteria for triggering active planning earlier than the minimum five-year frequency contributes to inconsistent response to potential triggers across regions, such as when a new solution option emerges or a new large customer wants to connect in the region.

The IESO is already taking steps to hold Technical Working Group meetings annually in each region, including in regions not subject to active regional planning and publish the outcomes or decisions from those meetings. Going forward, the Technical Working Group is expected to consider whether to trigger active planning at each annual meeting. The advisory group members emphasized that these meetings will only be effective if clear expectations, roles and decision-making principles are established so that decisions about starting active planning are consistent across regions.

5.1.2. Demand forecasting challenges

Stakeholders identified challenges related to demand forecasting. One challenge that stakeholders emphasized across the OEB's engagements was that the load forecasting is a complex and resource-intensive undertaking. Utilities noted the time-consuming effort needed to align electricity forecasts with municipal planning information since municipal growth plans and climate strategies often operate on different regional planning cycles and horizons. Recent initiatives, including the use of municipal information templates and educational outreach to municipalities, have helped improve data collection; however, the detailed information required for electricity forecasting is often only available directly from project developers or large customers rather than municipal planners.

Stakeholders also highlighted that while the Forecast Guideline is a valuable document that provides useful methodologies, it has not been followed

consistently. Stakeholders observed that inconsistent approaches to assumptions have led to significant forecast variations across utility forecasts particularly for electric vehicle adoption, heating electrification, large customer developments and municipal growth factors.

In many cases, utilities synchronize the effort required to prepare regional planning forecasts with the regional planning cycle and allocate minimal resources to maintaining the forecast between active planning cycles. This can mean that a step change of effort is required to update the forecast when active planning is initiated. This approach can also result in regional planning forecasts that do not align with utility capital planning forecasts submitted as part of rebasing applications.

A significant amount of forecast related work typically gets done after the start of the Integrated Regional Resource Planning (Stage 3) timeline. After utilities complete their individual forecasts, substantial effort is needed to harmonize them before planning work can begin. This reduces the time available for options analysis and stakeholder engagement as part of integrated planning.

Forecasting-related expectations on utilities are also increasing. The IESO is introducing the use of multiple electricity demand scenarios in regional planning products.² While this requirement will increase the workload associated with regional planning preparation, the advisory group noted that planning for a range of possible outcomes will make regional plans more flexible.

To address these challenges, stakeholders suggested that more prescriptive expectations for demand forecasting, including specifications for input assumptions, scenario requirements and documentation, would improve comparability across utilities and reduce the effort required to align forecasts before planning work begins. Structuring forecasting expectations with defined deliverables and deadlines could also increase the timeliness and transparency of utility forecasting.

² In addition, the Minister's Directive required the OEB to take steps to ensure that energy planning is informed by multiple demand scenarios including setting expectations for electricity distributors to begin incorporating multiple demand scenarios for their planning frameworks and processes by June 30, 2026, on a best effort basis.

5.1.3. Opportunities to streamline the regional planning process

The advisory group noted that the current multi-stage regional planning process could be streamlined to achieve time savings. One element the advisory group considered was the roles of the Needs Assessment (Stage 1) and Scoping Assessment (Stage 2) and the potential to consolidate their key outcomes into other stages. Advisory group members did not agree on the feasibility of eliminating the Needs Assessment. A regional planning participant stated that the Needs Assessment is particularly valuable for identifying straightforward needs such as load transfers that do not require coordinated planning, noting it would be less efficient to address these issues within an IRRP.

The IESO stated that the Scoping Assessment adds little value since the outcome of most Scoping Assessments is to proceed with Integrated Regional Resource Planning. Based on this, the advisory group agreed that the stand-alone Scoping Assessment could be eliminated and essential activities, such as the kick-off engagement, be merged into the Integrated Regional Resource Planning stage, which would reduce the overall process timeline by approximately three months.

The advisory group members also discussed factors affecting the potential to reduce the Integrated Regional Resource Planning timeline. The IESO noted that recently it had extended the Integrated Regional Resource Planning timeline to 24 months in several cases due to the complexity of planning for larger increases in demand. The addition of some activities currently performed in the Scoping Assessment as well as the new requirements to plan for multiple forecast scenarios will further expand the scope and complexity of Integrated Regional Resource Planning, increasing the likelihood of requiring 24 months for completion. Stakeholders suggested that one way to save time in the Integrated Regional Resource Planning stage would be to complete more forecast-related work in advance.

Finally, changes to Hydro One's Regional Infrastructure Planning process will produce two months of time savings. Hydro One indicated that, starting in 2027, Regional Infrastructure Plans may be completed in four months, compared to the current six-month timeline. However, Hydro One noted that this time savings will not be achievable in cases where there is a material change in the demand forecast during the Integrated Regional Resource Planning stage.

5.1.4. Improve regional plan monitoring

Regional planning outcomes are becoming more complex due to the increasing pace of growth and the addition of planning for multiple forecast scenarios. With the introduction of annual Technical Working Group meetings that will monitor plan implementation, stakeholders observed that it would be beneficial for IRRPs to include clearer implementation accountability. Currently, IRRP recommendations do not always specify a lead entity. Clarifying accountability as well as identifying in an IRRP the information that the Technical Working Group will require to monitor the progress of the recommendation at its subsequent annual meeting will improve oversight and coordination across entities after an IRRP is completed. Stakeholders also noted that the IESO is currently developing a Transmitter Selection Framework (TSF), which is expected to be a key implementation step for some IRRP recommendations. To support transparency and readiness, an IRRP should indicate when the TSF will apply.

5.1.5 Increase opportunities for solution providers

Wires and non-wires solution providers told the OEB that they would like to contribute to regional planning solutions but noted that the present process offers limited opportunities for their input. Specifically, the Integrated Regional Resource Planning timeline does not allow enough time for solution providers who are not members of the Technical Working Group to introduce options for evaluation. While opportunities for stakeholder input into an IRRP exist, the window for solution providers to propose alternative solutions, in between Needs Assessment and options evaluations by the Technical Working Group, is a relatively short portion of the 18-month Integrated Regional Resource Planning timeline.

6. REGIONAL PLANNING ENHANCEMENTS

The OEB is undertaking the following actions, which together, will strengthen regional planning by improving governance, streamlining forecast preparation, reducing the overall timeline, reinforcing implementation oversight and creating an additional avenue for stakeholder and community input:

- 1) Establish terms of reference for the Technical Working Groups
- 2) Create a forecast standard to drive utility forecast readiness

- 3) Save time by streamlining the regional planning process
- 4) Strengthen the monitoring and implementation of IRRP recommendations
- 5) Create an opportunity for stakeholders to provide written comments between IRRPs.

These actions, which are broadly supported by the IESO and advisory group members, directly support Items 4.3 and 4.4 of the Minister's Directive by ensuring that the regional planning process supports economic growth through integrated, cost-effective planning.

6.1.1. Establish terms of reference for the Technical Working Groups

The OEB will establish terms of reference for the Technical Working Groups to support the increasing expectations being set for it with the addition of annual meetings and to clarify responsibilities. These terms of reference will support the IESO's formalization of annual Technical Working Group meetings by defining the groups' accountabilities and decision-making responsibilities, including those related to triggering active planning, making the annual meetings efficient and effective. For clarity, the OEB proposes to create one terms of reference applicable to the Technical Working Group in each region. However, individual Technical Working Groups may decide to amend the terms of reference to address their unique circumstances or region-specific considerations.

Item 4.2 of the Minister's Directive states that the OEB will identify and, as the OEB considers necessary, take steps to require electricity distributors to provide their latest demand forecasts and any information pertaining to new demand growth each time the Technical Working Group meets. Based on the IESO's plan to implement annual Technical Working Group meetings, the OEB will identify the specific information that distributors must bring to each annual Technical Working Group meeting in conjunction with the development of the terms of reference and in coordination with the Gas-Electric Coordination Information Sharing Forum.

The OEB recognizes that the outcomes and decisions of annual Technical Working Group meetings will provide the OEB with a new source of updates about regions that are between active planning cycles. Currently, the IESO is required by its licence to report certain information to the lead transmitter by

October 1st of each year. This information informs an annual report that the lead transmitter is required to produce by November 1st of each year, as specified in the TSC. Once reporting on the annual Technical Working Group meetings becomes available, the OEB will consider whether the annual reports from the lead transmitter can be discontinued.

6.1.2. Create a forecast standard to drive utility forecast readiness

Stakeholders told the OEB that forecast-related work, a significant portion of which could be completed in advance, often consumes up to six months of the Integrated Regional Resource Planning timeline, reducing the time available for options analysis and engagement. To address this, the OEB expects all electricity distributors to maintain the resources and processes needed to develop and update electricity forecasts in response to the continually changing and increasingly complex needs of customers in their service area. This includes regular coordination with the municipalities and Indigenous communities that they serve to ensure alignment with municipal and Indigenous community plans. Maintaining continuous forecast readiness will enable streamlining of the regional planning process and strengthen utilities' system and business planning.

To drive forecast readiness and streamline the active planning stages, and realize the full value of the Forecast Guideline, the OEB will evolve the Forecast Guideline into a forecast standard. The OEB will propose amendments to the TSC and DSC to make compliance with the forecast standard a requirement. With respect to regional planning, the forecast standard will set out the OEB's expectations for utilities to deliver certain forecast scenarios and related information to the lead transmitter and the IESO, using standardized forecast templates, by a specific date in advance of each of the Needs Assessment and Integrated Regional Resource Planning stages, respectively. The forecast standard will prescribe methodologies and assumptions that will be used consistently across utilities but will not prescribe a process for utilities to follow to meet the delivery date. The OEB expects utilities to benefit from the flexibility associated with this outcome-based approach. The forecast standard will include a mechanism for the OEB to confirm utility adherence with the delivery dates to minimize process delays. It will also include deliverables related to the Gas-Electric Coordination Information Sharing Forum, setting out the OEB's comprehensive forecasting expectations for utilities.

Creating a forecast standard is expected to increase the efficiency of the regional planning process by clarifying what forecast information utilities need to provide and when. The OEB expects that the forecast standard could be completed in 2027. Once implemented, the OEB anticipates a significant portion of the forecast-related activities now done during the Integrated Regional Resource Planning stage will be completed in advance, enabling the integrated planning timeline to be shortened.

6.1.3. Save time by streamlining the regional planning process

The Minister's Directive specifically asks the OEB to identify ways to achieve time savings in the regional planning process such that the process is responsive to needs that emerge during a planning cycle, including ways to increase flexibility in the process. A shorter process helps ensure that recommendations are delivered in a timely way, with the flexibility to revisit and update them should conditions change. It can also minimize the likelihood that forecasts will change during the study period and avoid the need for repeated reassessment and delays in completion of an IRRP and a Regional Infrastructure Plan.

The OEB has identified three time saving opportunities, two of which can be realized in the near term, with the third in the medium term.

- As supported by the advisory group, the OEB expects that the IESO will request an amendment to its licence to discontinue the Scoping Assessment stage of the regional planning process. Discontinuing the Scoping Assessment will reduce the overall regional planning timeline by three months. The essential activities in this stage will be added to the Integrated Regional Resource Planning stage.
- In addition, Hydro One has committed to taking steps to reduce the Regional Infrastructure Planning stage from six to four months for regions without material change to the regional planning forecast.
- The OEB also expects that once the forecast standard comes into effect additional time savings will be achieved by shortening the Integrated Regional Resource Planning stage for regional planning cycles.

6.1.4. Strengthen the monitoring and implementation of IRRP recommendations

A key objective of the annual Technical Working Group meetings is to monitor the implementation of regional plans, which will become more complex with the introduction of multiple demand scenarios. Including more implementation information in an IRRP will provide a stronger basis for future monitoring of IRRP recommendations by the Technical Working Group.

The OEB will modify its regional planning process guidance to Technical Working Groups to require that IRRPs clearly identify the accountable entity for each recommendation and the basis for that accountability (e.g. applicable policy) or the subsequent mechanism for determining the accountable entity if it cannot be initially identified (e.g. the TSF). IRRPs should also set out key implementation considerations, such as the first step for each recommendation, critical dependencies with other energy plans or approvals processes or decision triggers and related timelines. This information will help clarify how recommendations will be implemented, how progress will be monitored and what information and status updates Technical Working Group members need to bring to annual meetings.

The OEB expects that expanding the scope of IRRPs in this way will support the efficient and effective implementation of IRRPs by clarifying what the Technical Working Group will monitor through its annual meetings between active planning phases and increasing transparency for stakeholders and communities.

6.1.5. Create an opportunity for stakeholders to provide written comments between IRRPs

Before each annual Technical Working Group meeting, the OEB will modify its regional planning process guidance to Technical Working Groups to require that interested parties be given the opportunity to provide comments on the most recent IRRP in the region, including identifying alternative solutions to medium- and long-term needs or identifying new loads that should potentially be planned for. Requiring the Technical Working Group to review this input, in conjunction with other relevant information, when deciding whether to trigger active planning will help ensure that plans reflect all reasonably available options and are as effective and informed as possible.

Comments will need to be submitted to the Technical Working Group early enough to allow members sufficient time to review them in advance of the annual meeting. The published outcomes of the annual Technical Working Group meeting should document how the Technical Working Group considered the input.

7. IMPLEMENTATION OF REGIONAL PLANNING ENHANCEMENTS

The OEB will lead the implementation of the regional planning enhancements identified in this review. The regional planning enhancements will be implemented primarily through three products:

- Terms of reference for Technical Working Groups
- A forecast standard
- An updated regional planning process document.

The OEB will also make changes to the TSC, DSC and the IESO's licence if required.

The OEB may reconvene the advisory group periodically in 2026 and 2027 to provide further input on the implementation of the regional planning enhancements set out in this report, for example by providing input on draft deliverables. This work will also be coordinated with related developments in the Gas-Electric Coordination Information Sharing Forum that has been initiated.

The OEB expects that some enhancements can be implemented in the near term. For example, the Scoping Assessment can be discontinued beginning with regional plans being initiated in the near term. With respect to Regional Infrastructure Planning, in regions where there is no material change to the forecast, Hydro One has indicated that it could reduce the timeline from six to four months beginning in 2027.³

The OEB expects it will take approximately nine months to develop the terms of reference for the Technical Working Groups. The OEB will provide interested parties with an opportunity to comment on the draft terms of reference before finalizing them.

³ All implementation timelines are subject to the OEB's organizational resourcing.

The forecast standard will be the most complex product resulting from this review and it will require the most lead time to implement. To develop the forecast standard, the OEB expects to create a small working group consisting of forecasting experts from Ontario electricity distributors, Hydro One and the IESO. This group will review the Forecast Guideline and propose amendments to it that will clarify and streamline the forecasting activities in regional planning. The forecast working group will also develop standardized forecast templates associated with the forecast standard.

The OEB expects that it will take approximately 12 months to develop the forecast standard. The first utilities that will need to produce forecasts and other information consistent with the forecast standard and in advance of a regional planning cycle would also require a lead time of approximately nine months to produce the required forecast.⁴ Based on these considerations, the OEB expects that the forecast standard could be in effect for regional planning cycles that start as early as 2028. During this lead time, the OEB will also continue to engage with the IESO about time savings that could be achieved in the Integrated Regional Resource Planning stage after the forecast standard is implemented.

Finally, the OEB will replace the 2013 Report with consolidated, up-to-date guidance. This product will consolidate process improvements documented in the 2021 advisory group report as well as the improvements identified in this review, including setting out the additional implementation information required for IRRPs and the process for stakeholders to provide written comments to the Technical Working Group between IRRPs.

The OEB expects that it will take approximately nine months to produce the updated regional planning process document.

⁴ Utilities that are participants in subsequent regional planning cycles will have more lead time.

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Part 2

Bulk Planning Review

8. CURRENT BULK PLANNING PROCESS

Bulk electricity planning in Ontario ensures that the province's high-voltage transmission system can reliably and efficiently deliver power and serve demand over the long-term. Under section 6(1) of the *Electricity Act, 1998*, the IESO is responsible for conducting independent planning for electricity generation, demand management, conservation and transmission. In fulfilling this mandate, with respect to bulk planning, the IESO integrates both provincial resource planning and bulk transmission planning activities.

Provincial resource planning evaluates province-wide electricity needs and assesses long-term supply adequacy. Bulk transmission planning examines whether Ontario's transmission system can reliably deliver electricity from generation and storage resources to customers. This analysis includes consideration of transmission corridor capacity, interties with neighbouring jurisdictions and the ability of the provincial electricity system to accommodate electrification and economic growth.

8.1.1. Bulk planning process and outputs

The IESO's bulk planning process involves four broad activities:

- Determine needs for electricity service
- Identify and evaluate options to meet those needs
- Develop planning analysis and advisory products
- Engage and communicate with stakeholders and communities throughout the planning process.

The IESO's [Annual Planning Outlook](#) (APO) summarizes long-term load forecasts which set the context for planning, describes key planning drivers and presents assessments of resource and transmission reliability. The APO also includes a Schedule of Planning Activities which identifies forecasted bulk system reliability issues that require dedicated studies. The Schedule of Planning Activities acts as a forward-looking agenda of bulk system planning studies, outlining the sequencing of planning issues the IESO intends to address.

The IESO's bulk system planning studies assess the needs for bulk planning regions across Ontario and determine how future reliability and capacity requirements can be met by generation, storage, transmission infrastructure

and non-wire alternatives. These determinations are informed by input from various stakeholders and guided by the bulk planning standards and criteria set by the North American Electric Reliability Corporation and the Northeast Power Coordinating Council. These studies are also informed by other IESO-related activities such as regional planning products, system impact assessments, customer connection applications and reliability outlooks.

Bulk planning shapes generation and transmission development in Ontario. For example, planned actions in the APO include securing capacity from major long-term procurement initiatives for new generation and storage resources, while bulk system planning studies inform the need and timing for large transmission projects.

9. STAKEHOLDER CONSULTATION AND FEEDBACK ON BULK PLANNING

The advisory group's input also provided the OEB with insight into the bulk planning process and opportunities for improvement. The advisory group members discussed how the process currently operates and its responsiveness to the pace of growth. Members offered differing views on the pace and structure of bulk studies. Some advocated for more clearly defined expectations, such as minimum standards, target planning timelines and more predictable milestones, to improve transparency for stakeholders and communities. Other members emphasized the importance of allowing the IESO sufficient flexibility, noting that rigid timelines could limit its ability to tailor studies to unique circumstances and emerging trends. The complexity of bulk planning was also recognized as requiring a flexible timeline for adequate analyses and engagement. Overall, the advisory group members agreed that the process should strike a balance between predictability and adaptability, ensuring that bulk system planning studies remain both efficient and responsive to the complexities of Ontario's evolving energy landscape. Members also highlighted the need for appropriate resourcing within the IESO to support timely, high-quality bulk system planning studies.

9.1.1. The IESO's ongoing improvements to bulk planning

The IESO presented its ongoing bulk planning process improvements to the advisory group. These enhancements include:

- Expanding the use of scenarios in bulk planning to plan for a range of possible futures
- Exploring how climate projections and extreme weather impacts can be incorporated into planning products to better capture emerging system risks
- Supporting information-sharing forums, including the Major Projects Identification Committee, which will increase the IESO's awareness of major projects and facilitate more responsive forecasting and planning
- Initiating quarterly update webinars on active bulk system planning studies.

9.1.2. Need for enhanced engagement and more process information

The advisory group identified the need to strengthen engagement as part of the bulk planning process and the need for more information about the bulk planning process itself. To support meaningful stakeholder and community engagement, the advisory group members stated that the process needs to be more predictable, with clear information provided in advance about study timelines, methodologies, decision points and how stakeholder and community input can shape a bulk plan. At the same time, the advisory group noted the importance of maintaining some flexibility so the IESO can adapt the process to different study contexts and emerging system needs.

The advisory group highlighted the need for improved access to transmission system information, including connection capacity and transmission corridors. This information would allow municipalities, solution developers, Indigenous communities and other stakeholders to make more informed decisions and to contribute credible solutions for evaluation in bulk system planning studies. In addition, the advisory group noted that planning assumptions must be aligned across the IESO and transmitters, including the base cases used in bulk system planning studies.

Finally, the advisory group members urged the OEB to review transmission cost responsibility issues related to large load customer and remote resource connections, noting that these connections could impose risks or costs on other transmission customers.

9.1.3. Considerations related to formalizing bulk planning

There were differing views among advisory group members on whether the OEB should formalize the bulk process in a prescriptive manner. Some members saw formalizing the process as a valuable solution to drive predictability and accountability. Others cautioned that prescriptive rules could introduce administrative burden and reduce flexibility.

The IESO presented a balanced approach to the advisory group, including a plan to develop a bulk planning process document. The advisory group members were receptive to this option, recognizing that it would increase clarity and accountability while maintaining process flexibility.

10. BULK PLANNING RECOMMENDATIONS

The OEB has reviewed the bulk planning process and is recommending several enhancements to increase the information available about bulk planning and strengthen engagement, thereby increasing transparency and predictability for stakeholders and communities.

As requested in the Minister's Directive, the OEB has also considered whether to formalize the bulk planning process through amendments to the IESO's licence, consistent with how the IESO's role in the regional planning process is formalized. The OEB does not consider it necessary to do so at this time. This approach, which is consistent with advisory group input and bilateral discussions with the IESO, maintains flexibility for the IESO to adapt the bulk planning process in response to demand growth, regional planning cycles and evolving system needs.

In terms of enhancements to the bulk planning process, consistent with advisory group input, the OEB recommends that the IESO take the following steps:

- 1) Develop a bulk planning process document
- 2) Publish and maintain a bulk planning dashboard, similar to the one it maintains for regional planning
- 3) Continue to provide quarterly updates on the status and schedules of active bulk planning initiatives.

10.1.1. Document the bulk planning process

Currently, there is limited information available about the bulk planning process. The OEB recommends that the IESO document the end-to-end bulk planning process, including the methodologies, process flow, timeline and stakeholder and community engagement opportunities. Publishing this document will improve process transparency and confirm opportunities for input.

10.1.2. Develop a bulk planning dashboard

Maintaining a centralized dashboard for bulk planning, consistent with the existing dashboard for regional planning, would allow stakeholders to monitor the status of bulk planning activities. The IESO's regional planning dashboard, which is updated biannually, includes status updates about active regional planning, key planning considerations and engagement activities.

10.1.3. Continue to provide quarterly updates on the status and timelines of active bulk planning initiatives

The IESO has recently started to provide quarterly updates on active bulk planning initiatives through public webinars and accompanying materials. These updates share comprehensive information about bulk study progress, schedules, planning drivers and considerations. Continuing these updates will increase the predictability of information sharing about active bulk system planning initiatives.

11. IMPLEMENTATION OF BULK PLANNING RECOMMENDATIONS

The OEB recommends the IESO to lead the implementation of the bulk planning enhancements identified in this review.

To document the bulk planning process, the IESO should draft an end-to-end bulk planning process document and invite comment on the draft from advisory group members. The final document should be posted on the IESO's website. The OEB expects that it would take approximately 12 months to complete this enhancement, subject to confirmation by the IESO, and encourages the IESO to move as quickly as possible to complete this work.

The IESO currently maintains a dashboard for regional planning, which could serve as a model for a new bulk planning dashboard. The IESO would determine the appropriate update frequency, data quality requirements and user interface design. The OEB expects that this could be launched as early as 2026.

Finally, the IESO should continue to deliver the quarterly updates that it has recently started providing through publicly accessible webinars and supporting materials. These events should continue to share status updates about bulk planning studies and provide opportunities for stakeholder input and feedback.

12. CONCLUSION

This review fulfills the requirements of Items 4.3 and 4.4 of the Minister's Directive by assessing whether Ontario's regional and bulk electricity planning processes are sufficiently responsive to the pace of electricity demand growth. Through extensive engagement with a wide range of stakeholders, the OEB identified improvements that directly address the Minister's Directive's three areas of focus: alignment with load growth, opportunities for time savings and responsiveness and considerations related to the formalization of bulk planning.

With respect to regional planning, the OEB will implement the enhancements set out in this report, which will strengthen process governance, improve forecast readiness, streamline the planning timeline and reinforce monitoring and implementation of IRRP recommendations. These steps, including the establishment of terms of reference for Technical Working Groups, the creation of a forecast standard and the discontinuation of the stand-alone Scoping Assessment, are intended to ensure that regional planning remains responsive, efficient and aligned with Ontario's economic growth objectives.

With respect to bulk planning, the OEB is recommending measures to improve transparency, predictability and engagement while maintaining the flexibility required for system-wide planning. The OEB recommends that the IESO document the bulk planning process, maintain a bulk planning dashboard and continue to provide quarterly updates on active bulk planning studies. The OEB is not considering licence amendments at this time, given the IESO's existing legislated mandate to conduct integrated planning, as

noted in section 8 of this report, and the need to preserve adaptability in bulk planning.

Taken together, the actions set out in this report will help ensure that Ontario's regional and bulk electricity planning processes remain integrated, coordinated and responsive to changing system conditions. They will also enhance transparency for planners, stakeholders, communities and ratepayers, supporting prudent investment decisions that contribute to Ontario's long-term reliability, affordability and economic growth.

The OEB intends to monitor the implementation and effectiveness of these enhancements and will consider further improvements as system needs evolve.

13. APPENDICES

13.1. Appendix A – Minister's Directive

Minister's Directive to the Ontario Energy Board, June 11, 2025:

4. Take the following steps to update the regional and bulk planning process to be more responsive to the pace of electricity demand growth, especially in high growth regions:

...

- 4.3 Undertake a review, informed by the IESO, of the regional and bulk planning process to identify other enhancements that can be made to match the pace of load growth, including recommendations for:

- More closely aligning the regional and bulk planning process with load growth and how load forecasts are determined for the purpose of identifying solutions and recommending system upgrades;
- Ways to achieve time savings and to ensure recommendations are responsive to major needs that emerge during a planning cycle, including ways to increase flexibility in the process; and
- Whether to formalize the bulk planning process consistent with the formalization of the regional planning process while ensuring flexibility to allow for time savings and responsiveness in the planning process.

- 4.4 Report back to the Ministry of Energy and Mines ("Ministry") on the above review of the regional and bulk planning process, including recommendations for any actions by the OEB (for example, proposed amendments to licences) or the Ministry to implement these improvements, by March 31, 2026.

13.2. Appendix B – Regional and Bulk Planning Process Advisory Group Members

1. Alectra
2. Association of Major Power Consumers in Ontario (AMPCO)
3. Association of Municipalities of Ontario (AMO)

4. Coalition of Concerned Manufacturers and Businesses of Canada (CCMBC)
5. Electricity Distributors Association (EDA)
6. Elexicon Energy
7. Enbridge Gas (EGI)
8. ENWIN
9. First Nations Major Projects Coalition (FNMPC)
10. Hydro One Distribution
11. Hydro One Transmission
12. Hydro Ottawa
13. Independent Electricity System Operator (IESO)
14. Ontario Energy Association (OEA)
15. Ontario Power Generation (OPG)
16. Regional and Single Tier Planning Leaders of Ontario (RSTPLO)
17. Regional Municipality of Durham
18. School Energy Coalition (SEC)
19. Sussex Strategy Corp
20. Toronto Hydro Electric System Limited (THESL)
21. Versorium Energy