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**Market Manual 7: System Operations**  
**Part 7.8: Ontario Power**  
**System Restoration Plan**

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**Issue 5.0**

This document provides the requirements, procedures and guidelines to be followed by those Market Participants that are Restoration Participants and the IESO to support and implement the Ontario Power System Restoration Plan.

**Public**

**PLAN**

## Disclaimer

The *Ontario power system restoration plan* (“*OPSRP*”) is the required operating procedure for the *IESO* and *restoration participants* to restore the power system and mitigate the emergency in the event of a partial or complete blackout. Actual *IESO* operations are based upon system conditions and prudent practice. System conditions may warrant deviation from written procedures. The *IESO* Shift Superintendent will determine the need for such deviation.

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## Document Change History

Issue	Reason for Issue	Date
1.0	1 <sup>st</sup> Issue - IESO Board Approval	June 2, 2000
2.0	Revised OPSRP for EPTF concurrence and IESO implementation for market opening	February 1, 2002
3.0	Issue of Public OPSRP released for Baseline 12.1	December 8, 2004
4.0	Issue released for Baseline 18.0	September 12, 2007
5.0	Plain Language rewrite, updated to meet new <i>NERC</i> standard requirements and <i>NPCC</i> Directory 8, added Alternative Arrangements and related diagrams released for Baseline 25.0	March 2, 2011

## Related Documents

Document ID	Document Title
IMO_PLAN_0002	<i>Ontario Electricity Emergency Plan</i>
IMO_MAN_0001	Emergency Drills & Exercises Guide
MDP_PRO_0016	Market Entry Manual - Facility Registration
IMP_MAN_0012	Operating <i>Market Manual 7: System Operations</i>

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# Table of Changes

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<b>Reference (Section and Paragraph)</b>	<b>Description of Change</b>
Document	<ul style="list-style-type: none"><li>• Plain language rewrite, updating to reflect revised <i>NERC</i> standards, inclusion of Specific Independent Actions, Alternative Arrangements, Enhanced Capabilities and related diagrams</li></ul>



# 1. Executive Summary

## 1.1 Introduction

Restoration after a blackout is a complex task that requires effective coordination, communication, and decision-making in the face of rarely seen grid configurations and operating conditions. Every disturbance is unique to the conditions of the day and the initiating cause. Exactly how the power system will respond, or the extent of any blackout following a disturbance cannot be predicted.

The *Ontario Power System Restoration Plan* (OPSRP) provides a framework to ensure that the *IESO* and *market participants* can collectively recover Ontario's *integrated power system* and re-establish interconnected operation. It provides the overall strategy, objectives, priorities, as well as restoration paths, and prescribed independent actions<sup>1</sup> for participants, while retaining the flexibility to meet the unique circumstances of any blackout.

In addition to providing a response framework, the OPSRP ensures preparedness through such requirements as:

- Individual and integrated equipment tests to meet Northeast Power Coordinating Council (*NPCC*) and Ontario-specific criteria
- Pre-defining communication protocols between the *IESO* and large *generation facilities*
- A process for *restoration participants* to submit and maintain essential restoration-related information and self-certify their preparedness
- A process for regular review of the OPSRP

## 1.2 Requirements

### NERC/NPCC

The OPSRP meets all restoration-related North American Electricity Reliability Corporation (*NERC*) and Northeast Power Coordinating Council (*NPCC*) requirements.

### Ontario

The *Electricity Act, 1998* describes the obligations of the *IESO* and participants to file emergency plans. These requirements are reflected in the *Market Rules* Chapter 5, Section 11, which describe how the *IESO* maintains and implements the OPSRP and how participants support it.

#### ***Electricity Act, 1998***

- 1) *The Minister shall require the IESO to prepare and file with the Minister such emergency plans, as the Minister deems necessary.*
- 2) *The Minister may require a market participant to prepare and file with the Minister such emergency plans as the Minister considers necessary.*
- 3) *The IESO shall assist in co-ordinating the preparation of plans under subsections (1) and (2).*
- 4) *The Minister may direct the IESO or a market participant to implement an emergency plan filed under subsection (1) or (2), with such changes as the Minister considers necessary.*

<sup>1</sup> See Section 16 'Definitions'

## 1.3 Consultation

In consultation with affected *market participants*, the *IESO*:

- Prepares and reviews the OPSRP
- May establish criteria beyond other *standards authority* requirements if needed to support grid<sup>2</sup> restoration capability

**- End of Section -**

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<sup>2</sup> In this market manual, 'grid' means the *IESO-controlled grid*

## 2. Restoration Participant Criteria and General Obligations

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### 2.1 Applicability

The following criteria identify facilities that can impact the restoration process. The *IESO* assesses each *market participant's* facilities against these criteria to determine which participants must be *restoration participants*. Some criteria are specific to a participant class, other criteria apply to all. A *restoration participant* that uses agents to operate any of its facilities is still obligated to meet the *restoration participant* obligations for those facilities.

### 2.2 Criteria

#### Transmitters

All *transmitters* are *restoration participants* because they own the facilities that comprise the grid.

#### IESO

The *IESO* is a *restoration participant* due to its role in restoration.

#### Generators

*Generators* that meet the following criteria are *restoration participants*:

- Own key facilities<sup>3</sup>
- Have the capability and intent, following a disturbance, to operate separate from the grid in a sizeable electrical island to supply priority customer loads
- Own breakers that are not restoration-related breakers<sup>4</sup>, but that the *IESO* deems necessary to accomplish restoration
- Are directly connected to the grid and have the capability to parallel two or more *transmission system* high voltage circuits

#### OR

- Whose *generation facility* is directly connected to the grid, and
  - Has an aggregate station capacity of:
    - ≥ 100 MW if the *facility* is located electrically south of Barrie
    - ≥ 50 MW if the *facility* is located electrically north of Barrie
  - Does not meet the capacity thresholds above, but is capable of providing voltage support during a restoration

#### OR

- Whose *generation facility* is embedded, and
  - Has an aggregate station capacity of ≥ 100 MW, or
  - Has an aggregate station capacity of ≥ 50 MW and is connected via a dedicated feeder (i.e., one without any load)

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<sup>3</sup> See Section 16 'Definitions'

<sup>4</sup> See Section 16 'Definitions'

## Distributors

*Distributors* that meet the following criteria are *restoration participants*:

- Own key facilities
- Have the capability and intent, following a disturbance, to operate separate from the grid in a sizeable electrical island to supply priority customer loads
- Own breakers that are not restoration-related breakers<sup>5</sup>, but that the *IESO* deems necessary to accomplish restoration
- Are directly connected to the grid and have the capability to parallel two or more *transmission system* high voltage circuits

### OR

- Whose *distribution system* contains or supplies (via another *market participant*) key facilities or critical power system loads

### OR

- Whose *distribution system* is served by a *facility* that is directly connected to the grid:
  - Where they exercise direct operational control of a restoration-related breaker, and
  - That supplies a peak load of  $\geq 20$  MW.

### OR

- Where they do not exercise direct operational control of a restoration-related breaker, and
- That supplies a peak load of  $\geq 700$  MW.

## Connected Wholesale Customers

*Connected Wholesale Customers* that meet the following criteria are *restoration participants*:

- Own key facilities
- Have the capability and intent, following a disturbance, to operate separate from the grid in a sizeable electrical island to supply priority customer loads
- Own breakers that are not restoration-related breakers, but that the *IESO* deems necessary to accomplish restoration
- Are directly connected to the grid and have the capability to parallel two or more *transmission system* high voltage circuits

### OR

- Whose *facility* is directly connected to the grid, and
- Supplies a peak load of  $\geq 20$  MW, and
- Where they exercise direct operational control of a restoration-related breaker

## 2.3 Restoration Participant General Obligation

*Restoration participants* are obligated, within the design and safe operation of their facilities, to help restore the grid after a partial or complete system blackout. The *Ontario Power System Restoration Plan* applies to all *restoration participants* and specifies the requirements to successfully meet this obligation.

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<sup>5</sup> See Section 16 'Definitions'

## 2.4 Planning Role

*Restoration Participants* must have a Restoration Plan Planning Coordinator, who is responsible for coordinating the restoration planning requirements of their facilities with the *IESO*. This function includes the responsibility to:

- Prepare and submit their *restoration participant attachment* (See Section 13 for details)
- Work with the *IESO* and other *market participants* to plan and participate in drills and exercises
- As applicable:
  - Coordinate with the *IESO* and their *transmitter* to plan and participate in integrated tests (black start and line energization)
  - Report on their critical component testing program
- Participate in revisions to the OPSRP

The *IESO* recommends that the person fulfilling this role should have sufficient technical/operational background to act as a subject matter expert on the operation of their facilities.

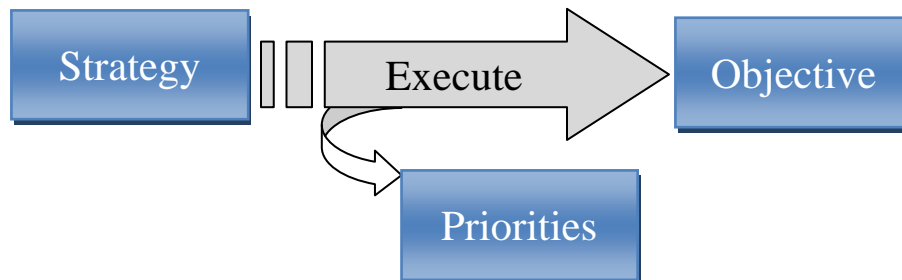
## 2.5 IESO General Obligations

The *IESO* is registered with *NERC* as Ontario's Reliability Coordinator, Transmission Operator, and Balancing Authority. These roles in conjunction with those set out in its license and the *market rules* obligate the *IESO* to:

- Direct system restoration, including the synchronization of islands and with external areas
- Work with *restoration participants* to achieve the OPSRP objective
- Coordinate restoration with other Reliability Coordinators, which includes the authority to act as the point of contact for sharing information regarding restoration

**- End of Section -**

## 3. Restoration Plan Objective, Strategy, and Priorities



### 3.1 Objective

Following a blackout, our objective is to regain a reliable *integrated power system* by restoring the grid using the available equipment. In doing so, we must ensure that voltage, frequency, and power flows are controlled so that restoration does not damage customer or power system equipment or re-collapse the grid. We meet this objective through execution of the strategy.

### 3.2 Strategy

Following a major disturbance, the grid may be totally or partially blacked-out and may contain isolated electrical islands consisting of load and generation. The overall strategy is to:

- Stabilize any surviving islands
- Recover generation
- Energize transmission
- Restore loads
- Synchronize islands to each other and to the remainder of the Eastern Interconnection

Execution of the strategy should reflect the priorities and load restoration principles below.

### 3.3 Priorities

1. Restore grid-supplied power to all nuclear sites – to secure the *generation units* and make them available to assist in restoration as soon as possible
2. Restore grid-supplied power to critical power system loads<sup>6</sup> at transmission and *generation facilities* – to supply *station service* to allow restoration to proceed
3. Restore grid-supplied power to critical power system loads fed from *distributors* – to supply telecommunications within their *distribution systems* needed to facilitate restoration
4. Restore loads needed to control voltage and reload *generation units*
5. Synchronize islands to each other and the broader *Interconnection*

<sup>6</sup> See Section 16 'Definitions'

Note that the strategy cannot be compromised to meet the priorities at the expense of the objectives. For example, although restoring power to nuclear sites is the number one priority, we will first need to restore some critical power system loads to enable this outcome.

### 3.4 Load Restoration Principles

Although the ultimate goal is to get back to normal and restore all Ontario load, the early stages of restoration are focused on restoring the *transmission system* and recovering generation. Load is only re-supplied for three reasons in the early stages of restoration:

- Critical power system loads - Loads essential to perform restoration.
- Voltage control - Unloaded or lightly loaded transmission lines act as capacitors and increase voltage on the system. As transmission is energized, load is often required to help keep voltage within limits.
- Reloading generation - Surviving large thermal *generation units* (fossil and nuclear) need to be reloaded as soon as possible after the disturbance, otherwise the thermal stresses and other physical limitations can slow recovery or prevent them from recovering. So after the transmission path to these *generation units* is built, they must be reloaded as quickly as possible, typically using large blocks of load.

Critical power system loads are re-supplied first as transmission is energized along a path. Once these are taken care of, other loads can be added to provide voltage control or to allow *generation units* to reload.

### 3.5 Priority Customer Loads<sup>78</sup>

Some customer loads are especially important to supply and should be re-supplied as soon as practical after a blackout. The interruption of these priority customer loads can have undesirable impacts on health and safety and the environment. The *distributor or connected wholesale customer*, in consultation with their *transmitter*, identifies these loads ahead of time. *Transmitters* can also designate priority customer loads. Priority customer loads are excluded from rotational load shedding schemes and are normally re-supplied ahead of any non-designated load.

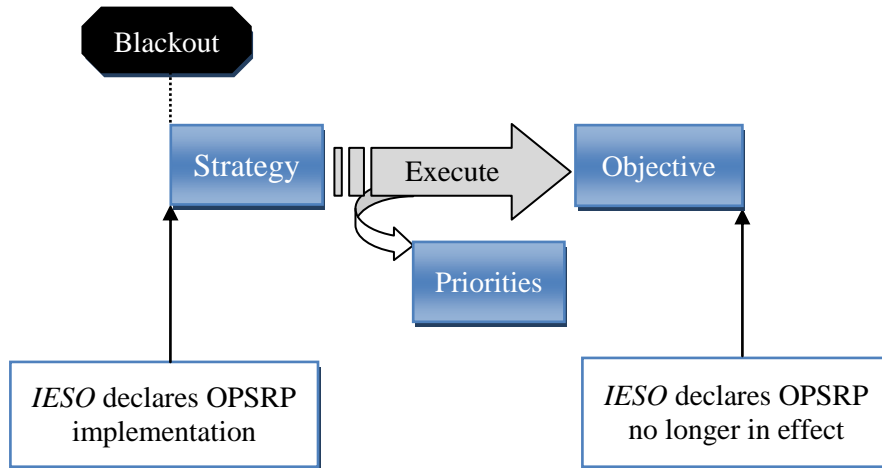
The urgency in restoring a priority customer load depends on the specific circumstances of the interruption, such as how long it has been off, the consequence of it remaining unsupplied, and how effective any mitigation efforts have been. Priority customer loads will be resupplied at the earliest opportunity, provided that this does not significantly delay achieving the restoration plan objectives or priorities.

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<sup>7</sup> Previously known as Priority 1 Customer Loads

<sup>8</sup> See Section 16 'Definitions'

### 3.6 Achieving the Objective



The *IESO*<sup>9</sup> is responsible for declaring the OPSRP in effect after assessing the conditions following a blackout. The *IESO* is also responsible for declaring when the OPSRP is no longer in effect, which occurs when the overall objective has been met, i.e.:

- Available transmission has been restored and,
- Available generation has been recovered and,
- Major islands have been synchronized to each other and the Eastern Interconnection and,
- Load restoration has progressed to the point where the choice of load to restore is not driven by the need to restore critical power system loads, or to control voltage or frequency

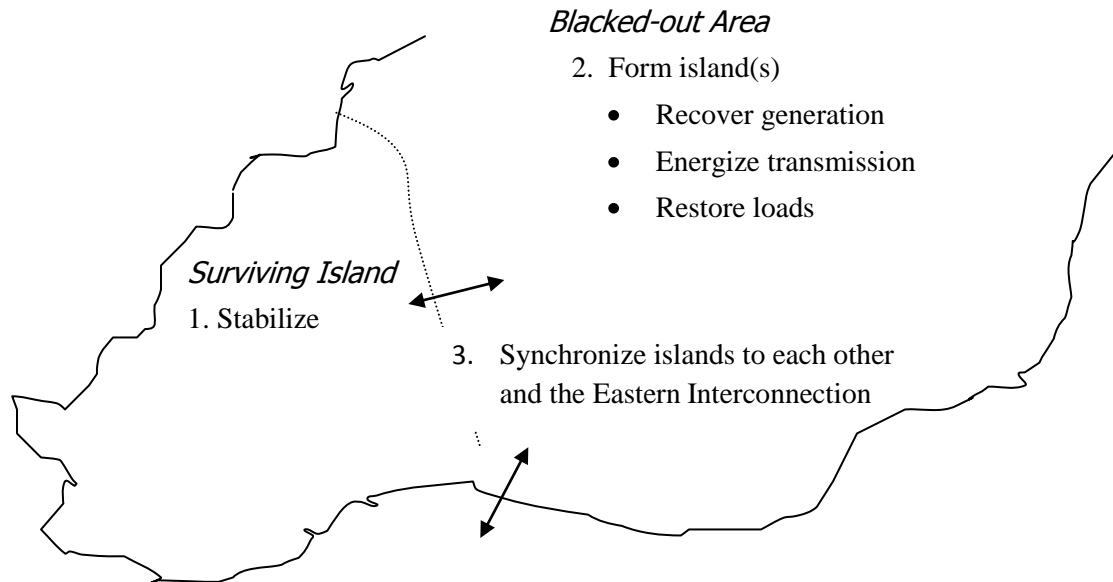
Note that even when the objective is met, an *emergency operating state* may still exist. The management of the *emergency* and the return to normal conditions is covered under other operating procedures, such as *Market Manual 7.1 ‘System Operation Procedures’*.

**- End of Section -**

<sup>9</sup> See Section 5.3 for more detail

## 4. Restoration Guidelines

Figure 1 illustrates the overall restoration strategy to follow within each of the areas shown in Section 10 ‘Restoration Paths and Procedures’. The guidelines described in this section are summarized in Section 7 ‘Rules of Thumb’.



**Figure 1: Restoration Strategy**

### 4.1 Stabilize Islands

Post-disturbance electrical islands often experience abnormal ranges of frequency and voltage. Immediate steps, following approved operating procedures, must be taken to stabilize these surviving islands, that is, actions to ensure they operate within normal frequency and voltage tolerances. This may include shedding load to achieve a sustainable frequency within the island.

### 4.2 Recover Generation

In blacked-out areas, the first stage of restoration is the black start of available *generation units* and the stabilization of surviving *generation units*, which are separated from the grid and are at synchronous speed or carrying a small amount of local load.

*Generator* operators must act immediately and independently to stabilize and secure their units, regardless of whether the *generation units* have survived or tripped off-line. *Certified black start facility* operators are expected to independently start those units and energize their *station service* bus to supply their *station service* as soon as possible.

It is very likely that most thermal and nuclear *facilities* will survive a system disturbance and be able to supply their own *station service*. In order for these *generation units* to be available to pick up load in the

subsequent restoration, they must reload to minimum levels as soon as practicable. Failure to respect these minimums may mean loss of the *generation unit* (poisoned out nuclear units) or very slow reloading times (thermal stresses on fossil units). Fossil *generation units* should be loaded to 25% of their *maximum continuous ratings* as a minimum.

### Wind Generation

Wind power is becoming a more prevalent form of generation, and has unique characteristics that must be considered during restoration. Wind turbines are not dispatchable, but have variable output as a function of wind speed.

Normally, automatic controls connect and disconnect banks of wind generation according to the wind speed and any maximum cap set by the wind *generator operator*. This variability of output is not a concern when the system is in a normal state, but can be problematic during a restoration, particularly when trying to stabilize or synchronize islands.

System operators have no control over embedded wind generation, but should apply the following guidelines for directly-connected wind generation during a restoration:

- In electrical islands:
  - Disconnect wind generation if their varying outputs cause unacceptable voltage or frequency deviations.
  - Disconnecting all wind generation at once may cause the island to collapse if the wind generation exceeds 5% of the island's *generation capacity*.
  - Disconnect wind generation in banks. Compensate with other generation or load shedding to maintain frequency.
- In blacked-out areas:
  - Ensure wind farms are disconnected and leave them out of service until the latter stages of restoration.

## 4.3 Energize Transmission

### Energizing Capability

A *generation unit's* ability to energize transmission circuits is a function of its excitation system, as represented by its generation capability curve. As a rule of thumb, a transmission line can be safely energized when the available capability of the connected *generation units* is 20% greater than the line charging MX. For example, a *generation unit* should have >120 MX spare reactive capability to safely energize a transmission line with 100 MX charging current.

*Generation unit* terminal voltages may have to be reduced to offset the anticipated voltage rise. However, they must not be reduced to the point where under-excitation protection trips the *generation unit* when the line energization is attempted. *Generators* should check their capability curves after they have performed any terminal voltage reductions to ensure they have sufficient margin to meet the rule of thumb.

*Generators* must also consider the impact on *station service* voltages and other local transient limitations.

*Generators* maintain their *generation unit* capability curves. Line charging MX values are available to affected *restoration participants* via grid operation diagrams.

**Voltage Rise**

Local bus voltages and line-end-open (LEO) voltages can rise dramatically when energizing unloaded or lightly loaded transmission circuits. Both must be managed to avoid exceeding equipment limitations.

Local bus voltage rise at the energizing station cannot be accurately predicted, as it is a function of:

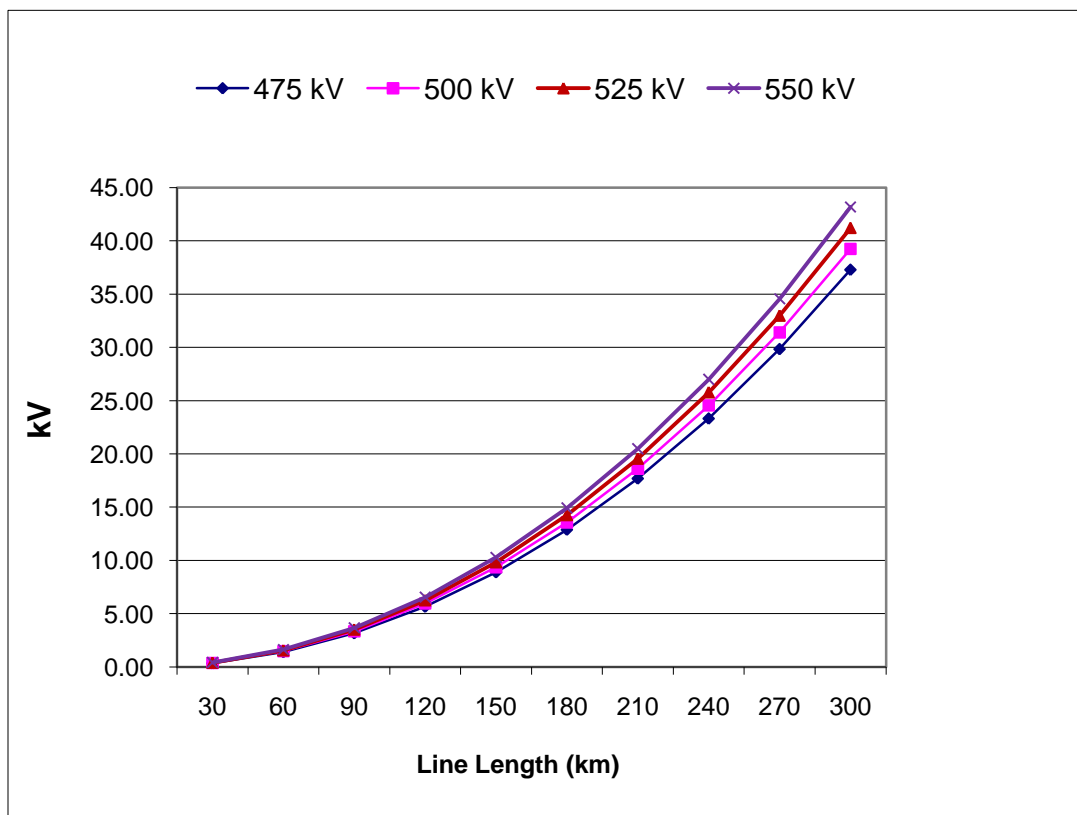
- The electrical distance from generation (series impedance),
- The line charging current, and
- The type of excitation system on the connected generating units.

These factors vary greatly depending on the specifics of the post-disturbance system. The rule of thumb is based on studies that indicate the worst case bus voltage rise is 1 kV for every 4 MX charging current, regardless of the voltage level.

Once the energizing terminal voltage settles out from the rise in initial bus voltage, the Ferranti effect will increase LEO voltage. The following graphs are used to anticipate LEO voltage rise as a function of line length and nominal voltage. The vertical axis indicates the kV rise at the open end of the line. The graphs do not apply to composite (overhead/cable) circuits or circuits constructed for a higher nominal voltage class than they operate (e.g., a circuit strung for 500 kV operating at 230 kV).

For example, when energizing a 100 km, 230 kV circuit, with 24 MX charging current and an initial local bus voltage of 240 kV, you would anticipate:

- Local bus voltage rise =  $24/4 = 6$  kV (worst case)
- Local bus voltage =  $240 + 6 = 246$  kV
- LEO voltage =  $246 + 2 = 248$  kV (use Figure 3: 230 kV LEO Voltages)



**Figure 2: 500 kV LEO Voltages**

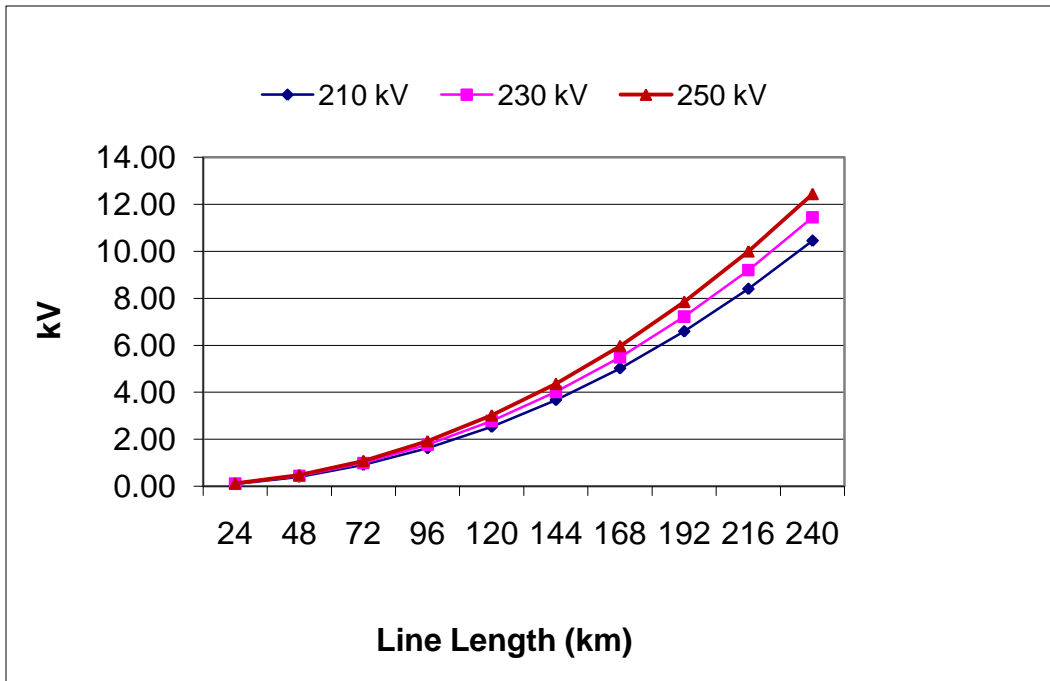


Figure 3: 230 kV LEO Voltages

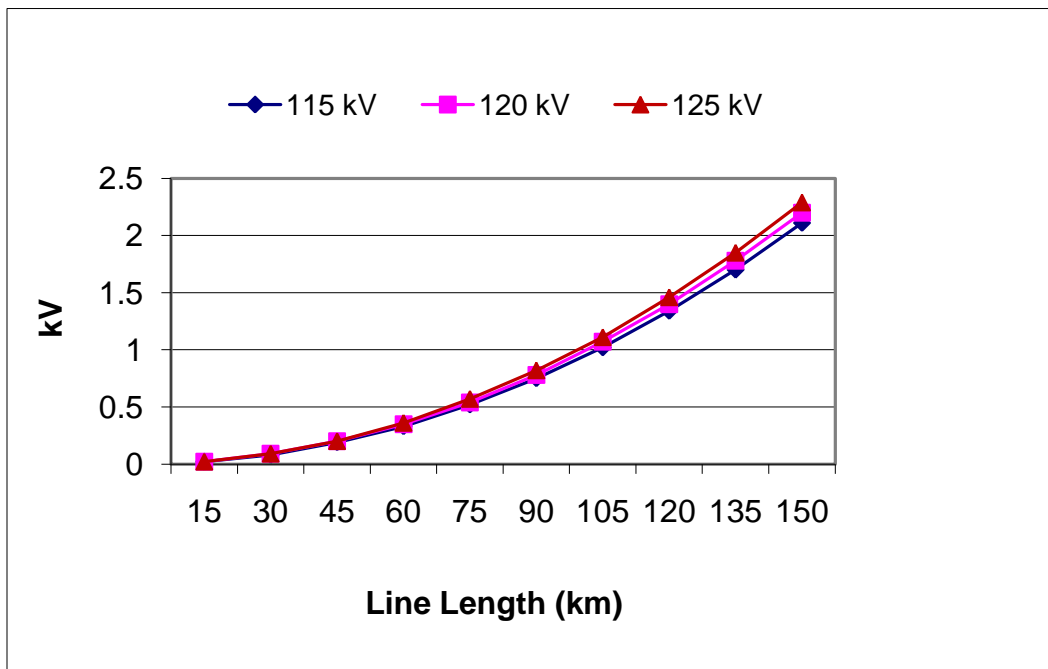


Figure 4: 115 kV LEO Voltages

## 4.4 Restoring Load

In the early stages of restoration, load is restored solely to maintain an acceptable voltage profile and to ensure the survival of nuclear and fossil *generation units* so they will be available for subsequent phases of restoration. Nuclear units are unavailable to the grid for a minimum of 36 hours if they are allowed to poison out.

Priority is given to re-establishing supply to generation, transmission sites and telecommunications to secure operator voice and teleprotection communications so that restoration can proceed. With input from *transmitters*, the *IESO* maintains a list of key telecommunications sites.

The maximum load block that can be restored in an island is a function of the available generation (inertia and governor response). The rule of thumb for restoring load in an island is that the maximum amount of load to be energized in a single switching operation must not exceed 5% of the connected *generation units*' nominal MVA, assuming a starting frequency of slightly greater than 60 Hz. This prevents a transient frequency decline to the level where underfrequency load shedding relays would operate.

Island frequency is very sensitive to load and generation changes, so they must be carefully controlled. Load restoration must not exceed the rates specified by the affected *generator* operators. Similarly, the type, rate and amount of load being restored must be controlled by the *restoration participant* who has direct operational control of the restoration-related breaker.

When restoring load, the initial amount of load drawn by a given feeder will increase in proportion to the length of time the load has been off-potential (cold load pick-up). To mitigate this unknown, follow these practices:

- Maximize the amount of synchronized generation to increase inertia in the island before adding load. This limits frequency step-changes and oscillations
- Restore relatively small blocks of load.
- Wait for voltage and frequency to stabilize before picking up the next block of load.

## 4.5 Dynamic Reserve

Dynamic reserve is reserve that automatically responds to a frequency deviation. It is provided by *generation unit* inertia and governor action on connected *generation units* and load armed to trip via under frequency load shedding relays. The *security* of an island is greatly improved when there is sufficient dynamic reserve to cover the loss of the single largest *generation unit*.

## 4.6 Starting Synchronous Machines

Synchronous condensers and pump *generation units* (in pump mode) are large induction motors that draw high currents when they are started (up to 5 times full load current). The resulting voltage and current transients (especially across-the-line machines) can pose a significant threat to island *security* during restoration. Consequently, starting synchronous machines should be deferred to the advanced stages of restoration and reduced voltage start machines should be placed in service before across-the-line start machines.

When a synchronous machine is started the nominal MVA capacity of synchronized *generation units* in the island should be 20 times greater than the nominal MVA rating of the synchronous machine. For example, there should be 600 MVA capacity of synchronized generation in the island before starting a synchronous machine rated at 30 MVA.

## 4.7 Synchronizing Islands

Both simulations and experience show that the probability of successful synchronization of islands is enhanced when the following guidelines are used.

### Closing Transient

The closing transient phenomenon occurs in the first few milliseconds after the synchronizing breaker is closed. A near instantaneous current surge occurs across the breaker due to the difference in voltage that exists just before the breaker is closed. This voltage difference may be due to differences in peak voltages and/or differences in phase angle between the two islands, which may be as large as 2 per unit.

The current surge is limited by the series impedance of the synchronizing path between the systems. A high voltage difference in conjunction with low series impedance can result in current surge magnitude approaching that of a fault.

To minimize the current surge when synchronizing islands, choose a path that maximizes series impedance, and ensure the voltage difference is kept to a minimum.

The following rule of thumb is recommended:

- Synchronize at locations electrically remote from major generation
- Synchronize at 230 kV rather than 500 kV
- Use longer lines for synchronizing: greater than 50 km for 230 kV and greater than 100 km for 500 kV
- Avoid synchronizing islands using 230 kV lines shorter than 30 km
- Ensure voltage difference across the synchronizing breaker is as close to zero as possible

### Synchronizing Transient

Immediately following the closing transient, there is transfer of *energy* across the synchronizing breaker as the two islands establish an *energy* balance. The speed and amount of the *energy* transfer is proportional to the frequency difference between the islands. The speed difference is called the slip frequency.

At a slip frequency of 0.1 Hz the voltage phasors of the ‘incoming’ and ‘running’ islands are moving relative to one another at a rate of 36 degrees per second. This would appear on the synchroscope as the needle taking 10 seconds to complete one revolution. Islands must not be synchronized at slip frequencies greater than 0.1 Hz. This rule of thumb is a maximum value; successful synchronization and minimal system impact are achieved when the slip frequency across the synchronizing breaker is as close to zero as possible.

The 0.1 Hz slip frequency criterion is as stringent as that used in the autosynchronizing schemes at nuclear and fossil stations. Also, where programmable synchrocheck relay schemes are used at transmission facilities, they are set at a slip frequency of 0.1 Hz or less.

### Post-Synchronization Frequency

Transient power flows take place between the newly synchronized islands due to load/generation imbalances as they seek to reach equilibrium. In the absence of any automatic control, these oscillations can grow to create an out-of-step condition and trip the synchronizing breaker. This outcome is mitigated by restoring additional transmission circuits between the islands as soon as possible (paralleling).

## 4.8 Interconnections

The *IESO* has *operating agreements* with all Ontario's interconnected jurisdictions that describe mutual obligations for *emergency* assistance and the requirement to share *reliability-related information* to meet these obligations. During a restoration, the *IESO* will, in coordination with other Reliability Coordinators, determine the appropriate time to resynchronize the Ontario grid with external systems. This assessment requires the affected areas to share their current system status and develop the operating plan to be followed once the two areas are successfully synchronized. The principles for synchronizing the areas are the same as outlined in 4.7 above.

The *IESO* and the other Reliability Coordinators should share the following types of information about their areas:

- The magnitude of load and generation (island size)
- Largest contingency and available *operating reserve*
- Prevailing voltage and frequency ranges
- The adequacy of reactive reserves
- The progress of their internal restoration, including anticipated rate and timing of increases to island size
- Any plans to synchronize with other Reliability Coordinator areas
- Any known risks to the *security* of their islands, e.g., severe weather

The operating plan to be followed once a portion of the Ontario grid has been successfully synchronized to an external area should consider:

- *AGC* mode and schedules (if appropriate)
- Which area(s) will provide *AGC*/frequency control
- Projected and acceptable power flows/ limits
- Control actions in case of a contingency on either system
- Any conditions that would require the two systems to be separated to avoid re-collapse

Although resynchronization with the Eastern Interconnection is highly desirable, the timing for this step requires *IESO* judgment and must be made in the context of respecting the OPSRP's priorities and overall objective.

**- End of Section -**

## 5. Performing Restoration

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Execution of the restoration strategy must be managed and coordinated. The *IESO* directs the restoration process using the procedures in this section along with Section 10 ‘Restoration Paths & Procedures’ and Section 4 ‘Restoration Guidelines’. Sections 6 – 9 provide a quick reference for operational actions, rules of thumb, communications, and black start operational details.

During restoration, voltage and frequency should be controlled within the ranges specified in the *IESO* grid performance standards<sup>10</sup> and to respect *facility* equipment ratings.

*Restoration participants* must follow the procedures in this section and apply approved *emergency* procedures as needed, such as manual load shedding for underfrequency.

*Restoration participants* must consider the impact on equipment, employee or public safety and the environment for any independent or *IESO*-directed actions they take.

### 5.1 Communication<sup>11</sup>

During restoration, the activation of other *emergency* response organizations and their need for information can put an additional burden on operators. Operators must ensure that communications affecting real-time operation use normal operating channels.

Prompt communications between key *restoration participants* will ensure that resources are used most efficiently.

### 5.2 Opening Off-Potential Breakers

The following participant-specific sections detail how off-potential breakers should be opened in blacked-out areas. *Restoration participants* with direct operational control of a large number of breakers should prioritize which breakers to open first.

In the initial conversation with these participants, The *IESO* will communicate the intended restoration paths, including probable sources of potential. Breakers can then be opened in the most efficient sequence to expedite the restoration – typically all off-potential breakers on the restoration path, starting with the transmission and step-down stations closest to the potential sources. This does not preclude independent opening of all other off-potential breakers if there are sufficient resources to do so.

Any exceptions or alternative arrangements to independently open circuit breakers, other than noted above, must be:

- Identified by the *restoration participant*,
- Approved by the *IESO*, and
- Documented within the *restoration participant attachment*.

It is acceptable to initially open the transformer secondary breakers at step-down stations, leaving the bus tie and feeder breakers closed until later in the restoration when load may be restored.

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<sup>10</sup> See Market Rules Appendix 4.1

<sup>11</sup> See Section 9 ‘Communications’ for more detail

### 5.3 IESO

The *IESO* is responsible for assessing conditions after a partial or complete system blackout and:

- Declaring an *emergency operating state*
- Declaring the implementation of the *Ontario Power System Restoration Plan*
- Advising *restoration participants* needed to implement restoration paths
- Declaring when the OPSRP is no longer in effect in an area and resuming normal operation, following approved operating procedures

### 5.4 Coordination Discussion with Transmitters

Following the post-disturbance assessment, the *IESO* will have an initial discussion with *transmitters* to share their plan, which will include sources of potential to begin restoration, restoration paths, number of paths to be restored simultaneously, and any other restoration-related priorities. This will help *transmitters*:

- Prioritize off-potential circuit breaker opening
- Assign staff to assist the *IESO* in restoration
- Address the need to send staff to remote facilities

### 5.5 Islands

The *IESO* directs operations to stabilize surviving electrical islands. This may include load shedding to achieve a sustainable operating frequency or collapsing an island in which frequency cannot be monitored or controlled. Post-disturbance actions are taken in accordance with approved operating procedures and *Market Manual 7.1 'System Operating Procedures'*.

The *IESO* determines and directs which *generation facilities* are required to perform *regulation* (frequency control) for the electrical island being restored. Following the successful start of a *certified black start facility*, this *regulation* role should be transferred to other *generation facilities* if they are available and better suited to this role.

The *IESO* directs the synchronizing of all electrical islands.

### 5.6 Alternative Arrangements

Alternative arrangements are tasks that can be assigned by the *IESO* to *restoration participants* to expedite restoration. Alternative arrangements require a *generator* and *transmitter* to act independently to achieve clearly defined objectives that are limited to specific electrical boundaries once initiated by *IESO* direction. Details are provided in Section 10.

### 5.7 Transmitters

In addition to the independent actions described below, *transmitters* should take any other pre-approved independent actions to respond to *emergencies* as set out in the *market rules*, *market manuals* or local instructions, e.g., load shedding for low frequency or unacceptable voltage.

### Independent Actions on Loss of Potential

Following a complete loss of potential to significant portions of their service territory affecting stations under their direct operational control, *transmitter* operators must independently take the following actions:

- Open all off-potential 500, 230, and 115 kV circuit breakers and step down transformer station transformer secondary breakers on the grid
- Open all off-potential capacitor, reactor and synchronous condenser circuit breakers
- Report conditions to the *IESO*

### Prioritizing Off-Potential Breaker Opening

Until the *IESO* has had the initial coordination discussion with the *transmitters*, *transmitters* should first open off-potential circuit breakers at transmission stations and step down transformer stations closest to:

- *Certified black start facilities*
- Surviving islands or other sources of potential that they are aware of

Once the plan for restoration has been communicated, the *transmitter* must adjust its breaker opening sequence to reflect the sources of potential and restoration paths the *IESO* specifies.

### Air Blast Circuit Breaker Considerations

Large transmission stations consist of many high voltage air blast breakers and their supporting compressed air systems. *Transmitters* that own such assets must:

- Pre-determine the ability of the air systems to support multiple breaker operations
- Adopt local operating procedures to monitor for problems and to mitigate any identified shortfalls in capability (e.g., use of a diesel generator)
- Include these measures in their *restoration participant attachment*

### Potential Restored

Once potential is restored to step down transformer stations, *transmitter* operators must independently perform *station service* switching to restore key equipment such as communications *facilities*, high voltage cable oil pressurization systems and battery chargers.

### IESO Direction

Under *IESO* direction, *transmitters* must:

- Perform *transmission system* switching to build electrical islands
- Perform restoration- related operating tasks the *IESO* assigns
- Perform *transmission system* switching required to synchronize islands to each other or to Ontario's *interconnections*

## Other Roles

*Transmitters* that exercise direct operational control on behalf of a *distributor* must meet the obligations described in Section 5.8.

## 5.8 Distributors

### Independent Actions on Loss of Potential

*Distributor* operators must independently take the following actions after a complete loss of potential to all stations under their direct operational control:

1. Open all off-potential transformer secondary breakers at step down transformer stations and distribution stations that are directly-connected to the grid. (i.e., tapped off circuits > 50 kV nominal)
2. If the *distributor* knows that the initiating disturbance is local - report conditions to the *IESO*.
3. If the *distributor* does not know the extent of the initiating disturbance they should take steps 4 and 5 before reporting conditions to the *IESO*.
4. Open all off-potential feeder breakers and bus tie breakers at step down transformer stations and distribution stations that are directly connected to the grid (i.e., tapped off circuits > 50 kV nominal) only as necessary to control cold load pickup.
5. Open all off-potential capacitor, reactor and synchronous condenser circuit breakers.

*Distributors* must not open voltage *distribution system* breakers downstream from step down transformer stations unless necessary to control load pickup or cold load pickup. As restoration progresses, more generation becomes available and there is a need to frequently restore large blocks of load to ensure the generation remain available to continue the restoration. This is most efficiently accomplished by closing the breakers at step down transformer stations rather than by closing many breakers within a *distribution system*.

### Potential Restored

When potential is restored to a blacked-out station, *distributors* must independently perform *station service* switching at step down transformer stations and distribution stations to restore key equipment such as communications *facilities*, high voltage cable oil pressurization systems and battery chargers, subject to the following:

- Customer load must not be restored before the *IESO*'s direction to do so
- The placing on potential of a low tension bus must not trigger automatic restoration of feeder load from another blacked out station via the distribution network
- Any companion transmission circuits must not be energized or paralleled via backfeed
- *Station service* switching does not delay any other key aspect of the restoration in progress

Normally, the configuration at *distributor* controlled stations does not allow this independent switching to take place without violating the restriction on picking up customer load. Under this circumstance, *distributors* should prioritize their feeder breaker loads so that when the *IESO* directs load restoration, these critical power system loads are energized first.

### Load Restoration

*Distributor* operators must independently perform low voltage switching to restore load in amounts and at rates the *IESO* specifies directly or as relayed through the *transmitter*. As load is restored, *distributors* must monitor voltage and ampacities.

## 5.9 Connected Wholesale Customers

### Independent Actions on Loss of Potential

*Connected wholesale customer* operators must independently take the following actions after a complete loss of potential to stations under their direct operational control:

1. Open all off-potential transformer secondary breakers at step down transformer stations that are directly-connected to the grid (i.e., tapped off circuits > 50 kV nominal)
2. Report conditions to the *IESO*
3. If the *IESO* identifies that the disturbance is widespread, the *connected wholesale customer* should take steps 4 and 5 before reporting conditions to the *IESO*
4. Open all off-potential feeder breakers and bus tie breakers at step down transformer stations that are directly-connected to the grid (i.e., tapped off circuits > 50 kV nominal)
5. Open all off-potential capacitor, reactor and synchronous condenser circuit breakers

### Load Restoration

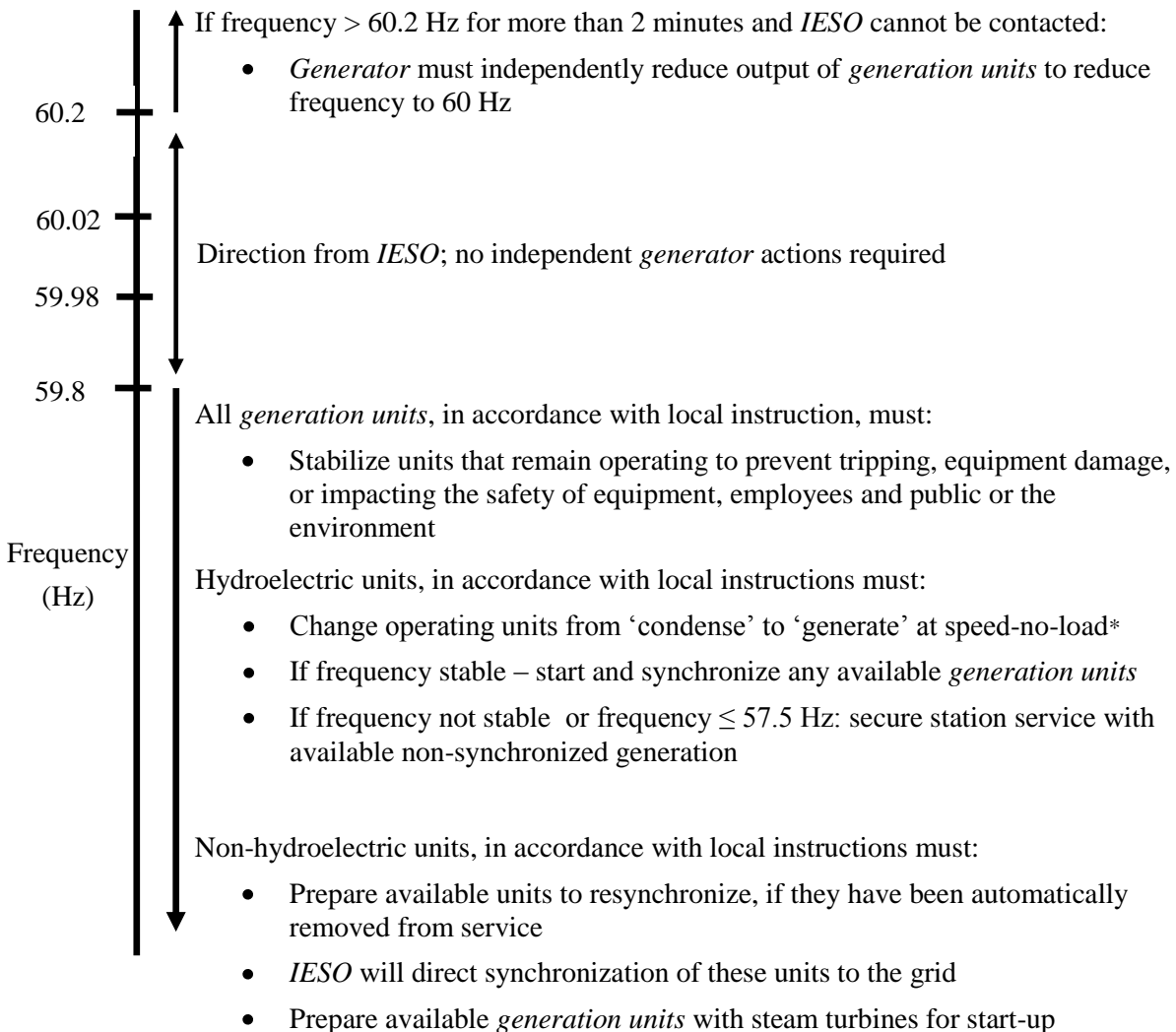
*Connected wholesale customer* operators must carry out low voltage switching to restore load in amounts and respecting any restrictions the *IESO* specifies directly or as relayed through their *transmitter*. As load is restored, *distributors* must monitor voltage and ampacities.

Initially only base loads should be restored (such as lights, heating, and essential loads including those required for safety). Once the *IESO* declares the system stable, process loads can be restored in amounts and at rates the *IESO* specifies directly or as relayed through the *transmitter*.

## 5.10 Generators

### Abnormal Frequency

Abnormal frequency is anything outside the normal range of 59.98 – 60.02 Hz. *Generators* must take actions at the frequency trigger-points shown in Figure 5.

**Figure 5: Generator Actions During Abnormal Frequency**

\*Speed-no-load means the unit is in service, running at synchronous speed with its unit breaker closed without any appreciable load on the unit. Normally, changing a unit from condense to speed-no-load places *station service* load on the unit. Some *facilities* are pre-set to automatically load restarted *generation units* with certain in-house loads, which is acceptable during restoration, since the unit is not synchronized to an island. This configuration must be documented in a *restoration participant attachment*.

### **Independent Actions on Loss of Potential**

*Generator* operators must independently take the following actions following a loss of potential to a *generation facility* under their direct operational control:

- Open all off-potential unit and switchyard circuit breakers under a *generator* operator's direct operational control.
- Begin black start procedures for *certified black start facilities* – in conjunction, contact the *IESO* to determine the extent of the blackout. If the blackout is localized, the *IESO* may suspend black start procedures and use other parts of the grid to restore.
- Secure *station service* with any available *generation units* in accordance with local instructions and agreements. This may include restarting hydroelectric *generation units* to run them at speed-no-load by closing the unit breaker (using synch bypass or synchronizing to other units). If the unit breaker must be closed to pick up *station service*, operators must ensure they do not energize external transmission elements – transformer air break switches may have to be opened prior to closing the unit breaker.
- For *generation facilities* with the capability to energize-out via synch bypass, operators must stabilize units and prepare them to energize transmission circuits as directed by the *IESO*.

### **Other Post-Disturbance Considerations**

Circuit energization and generating unit synchronization to the grid must only take place under *IESO* direction or authorization, except for hydroelectric *generation units* operating under abnormal frequency conditions as noted under Figure 2.

### **Generator Actions During Abnormal Frequency**

When directed by the *IESO*, a *generator* operator must regulate frequency to the specified frequency (normally 60 Hz or slightly above) by adjusting the governor of the designated *generation units*.

The *generator* operator must maintain unit voltages within the normal range and keep the *generation unit's* automatic voltage regulator in service where possible.

**- End of Section -**

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# 11. Black Start Requirements

## 11.1 General

Black start is the ability of a *generation facility* to start without power from grid-supplied *station service* or other *generation unit* support. The *IESO* procures *black start capability* through an *ancillary service* contracting process. These contracted *generation units* are *certified black start facilities* and must satisfy *NERC*, *NPCC*, and *OPSRP* requirements.

Following a blackout, *certified black start facilities* must be capable of:

- Being started by the *generator* operator in the absence of any communication with the *IESO*
- Energizing transmission in a defined area of the grid
- Providing power to facilitate the start-up of other generation capable of assisting in restoration
- Supplying the power requirements of its restoration path, which depend on the configuration and priority of connected loads and the need to supply load for voltage or frequency control

## 11.2 Number and Location

The *IESO* determines the need for *certified black start facilities*; ideally one in each of the four electrical areas. A *certified black start facility* can be located anywhere in an electrical area provided there is sufficient transmission capability.

## 11.3 Performance Criteria

The *IESO* assesses or tests each black start *facility* to certify it:

- Can start and deliver power without externally supplied *station service* or another *generation unit's* support
- Can annually energize-out on its associated transmission circuit
- Has sufficient MW and MVAR capability to energize the required transmission circuits and supply the power requirements of its path
- Can sustain this MW and MVAR capability long enough to complete all required transmission circuit switching and start-up of other generation on its path capable of assisting in restoration
- Can complete at least 3 black starts in 8 hours - due to the transients in an island, there is a possibility of re-collapse during a real event, so this capability is essential
- Can close its unit breaker to energize its associated transmission circuit within the time limits shown below:

Generation Type	Time to complete black start
Hydroelectric	30 minutes
Aero-derivative gas turbine	30 minutes
Industrial/Frame type gas turbine	60 minutes
Hot steam driven turbine	2.5 hours

The *IESO* assesses timelines for other generation technologies on a case-by-case basis. The *IESO* uses these times to assess black start performance under planned circumstances and stable system conditions. The *IESO* recognizes that during a restoration, *start-up times* may deviate from these due to the actual conditions following a system disturbance.

Test details are available in Section 12 ‘Testing’.

## 11.4 Other Requirements

The *restoration participant* operating a *certified black start facility* must:

- Ensure the *facility* has real-time frequency measurement that they can monitor in real-time
- Have reliable primary and alternate voice circuits between the black start control *facility* location and the *IESO*
- Have reliable primary and alternate control circuits between the black start *facility* and any remote control location
- Be capable of sustaining voice communication, telemetry, and control for 8 hours without an external AC supply
- Maintain up-to-date written start-up procedures, which must be provided to the *IESO* within 14 days of a request, at no cost to us

## 11.5 Availability

*Certified black start facilities* must be available 98% of the hours in a year unless otherwise specified in the *ancillary service* contract. This allows an opportunity to perform maintenance on the *facility*. To ensure adequate *certified black start facilities* are available, all maintenance must be scheduled using the *IESO*'s *outage* management process.

- End of Section -

## 12. Testing

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### 12.1 General

Prompt restoration depends on the successful response of equipment and people. Preparedness is ensured through regular equipment testing and the periodic practice of restoration procedures through drills and exercises. Successful restoration depends on the ability of station and auxiliary equipment to remain operable when normal AC *station service* is lost. *Restoration participants* should regularly test station auxiliary equipment in accordance with *good utility practice* to help assure its operability during a blackout. Additional diligence is provided through verifying the performance of critical components at key facilities and performing integrated tests, such as energizing off-potential circuits from certain *generation facilities*.

*Restoration participants* may request that the *IESO* consider an actual system event as a successful completion of one of the tests described below, as long as the event met the test's objectives, performance standards, and reporting requirements.

### 12.2 Critical Component Testing

*NPCC* Directory #8 System Restoration<sup>12</sup> contains the testing requirements for critical components at the key facilities that comprise the Basic Minimum Power System in Ontario. These requirements include the type of test, frequency, duration, and success criteria. Prompt restoration depends on the successful operation of critical components. Testing these components with an appropriate frequency gives reasonable assurance they will operate as required during an actual event.

The *IESO* is responsible for:

- Identifying Ontario's Basic Minimum Power System and associated key facilities
- Maintaining a list of key facilities, in consultation with affected asset owners
- Annually reporting the status of Ontario's critical component tests to *NPCC*

Participants with key facilities and critical components must:

- Meet all testing requirements (*NPCC* and additional requirements described below)
- Report any failed tests or degradation of critical components to the us in real-time
- Self-certify their compliance via the Reliability Compliance Program

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<sup>12</sup> <http://www.npcc.org/documents/regStandards/Directories.aspx>

The table below shows the allowable range of times between critical component tests for compliance with NPCC test frequency requirements. The IESO can work with a *restoration participant* to adjust these ranges by mutual agreement on a case-by-case basis.

Term	Time between tests must be...	Time between tests cannot exceed...
Annually	at least 180 days	400 days
Semi-annually	at least 3 months	7 months
Quarterly	at least 7 weeks	16 weeks
Monthly	at least 15 days	35 days

## 12.3 Additional Testing Requirements

The following testing requirements are in addition to those specified by NPCC.

### Supplemental Generators

Certain hydroelectric *certified black start facilities* require a supplemental *generation unit* (usually a diesel) to supply *station service* to allow the head gates to be raised. Any supplemental *generation unit* that is required to support the start-up of a *certified black start facility* must be tested monthly. A successful test requires the supplemental *generation unit* to start without grid supply, synchronize, and carry load for 15 minutes. This testing does not have to use the IESO's *outage* management process.

The black start service provider must:

- Maintain local records of the test results, which we may audit. (Successful tests do not require any reporting to the IESO)
- Immediately report test failures to the IESO, including the expected remedial actions and an estimated time when the supplemental generator will be capable of meeting the success criteria
- Send the IESO a written report within one month of the failure

## 12.4 Certified Black Start Facilities

To satisfy their certification, *certified black start facilities* must be tested annually. A successful test requires the black start *generation unit* to start and synchronize under the same conditions as expected under blackout conditions. Test scheduling must use the IESO's *outage* management process<sup>13</sup> and provide sufficient lead-time to allow IESO staff to observe the test at the *facility*.

### Test conditions

While isolated from all power sources and related *generation unit* support:

- The black start *generation unit* must start and synchronize within the time specified in Section 11.3. This time is measured from the time *station service* is interrupted until synchronization.
- Key operating aids and auxiliary systems, such as voice communications and control systems must be verified to operate adequately.

<sup>13</sup> Market Manual 7.3 'Outage Management'

- Hydroelectric *generation units* must start from a shutdown state, with head gates fully lowered and governor systems depressurized to the alarm state.
- Fossil *generation units* must start while in the hot state. The turbine can be on turning gear, but all related support (such as cooling water) must be isolated from power supplies external to the testing unit.

The black start service provider must:

- Immediately report test results to the *IESO*
- Send the *IESO* a written test report within one month, which includes how the test was conducted, problems encountered, and the degree to which the test was a success

For failed tests, both the verbal and written reports must include the expected remedial actions, an estimated time to implement them, and a retest date.

## 12.5 Line Energization Tests

Following a blackout, *certified black start facilities* and other surviving *generation units* are used to reenergize the grid. Although off-line studies can be used to determine the feasibility of re-energization from these *facilities*, actual line energization tests are used to validate:

- Study results
- Operating procedures
- The effectiveness of operator training

In conjunction with the annual OPRSP review, the *IESO* updates the line energization test program in consultation with affected participants.

### Certified Black Start Facilities

*Certified black start facilities* must perform a line energization test annually, which may be conducted in conjunction with their annual black start test. Test scheduling must use the *IESO's outage* management process. If requested by the black start provider, the *IESO* will coordinate with other involved *restoration participants* to find a mutually acceptable time for the test.

A successful test requires the *certified black start facility* to energize the circuits designated in the test plan and maintain acceptable frequency and voltage at the remote end of the line for 10 minutes. During the test, the *certified black start facility* must be isolated from the power system and must supply its own *station service*. The *IESO* directs the energization of the circuits designated in the test plan.

Following the test, participants must verbally report the following to the *IESO*:

- Frequency
- Voltages at both ends of the energized line
- Any problems identified during the test

The *IESO* is responsible for determining the need for a written report and writing it. In support of this report and the *IESO's* off-line studies, participants must submit the data identified in the test plan within 14 days of the test, when requested.

### Other Generation Facilities

Following a blackout, any surviving *generation facilities* are expected to participate in subsequent restoration, to the extent that they are capable. In consultation with affected *restoration participants*, the *IESO* will pursue opportunities to conduct line energization tests with *generation facilities* that are capable of energizing off-potential circuits. Performance of these tests will only take place if all equipment ratings and limitations can be respected and the affected *generator* and *transmitter* agree with the test plan. Test scheduling must use the *IESO*'s *outage* management process.

A successful test requires the *generation facility* to energize the circuits designated in the test plan and maintain acceptable frequency and voltage at the remote end of the line for 10 minutes. During the test the *generation facility* must be isolated from the power system, but the *IESO* may waive the requirement that the *facility* supply its own *station service*. The *IESO* directs the energization of the circuits designated in the test plan. Following a successful line energization, the *generator* will decide whether to allow the *transmitter* to synchronize their unit back to the grid or take the circuit off potential.

Following the test, participants must verbally report the following to the *IESO*:

- Frequency
- Voltages at both ends of the energized line
- Any problems identified during the test

The *IESO* is responsible for determining the need for a written report and writing it. In support of this report and the *IESO*'s off-line studies, participants must submit the data identified in the test plan when requested.

## 12.6 Drills and Exercises

Scenario-based drills and exercises allow *restoration participant* operators to practice their response to disturbances. In addition, these sessions are used to identify equipment, procedure, and operating gaps that could impact a real restoration event.

The design and execution of drills and exercises is consistent with industry best practices and is described in the 'Emergency Drills and Exercises Guide',<sup>14</sup> posted on the *IESO* website.

The schedule, scope, objectives, and format for drills and exercises are developed through consultation with *restoration participants* and are endorsed annually through the Emergency Preparedness Task Force.

- End of Section -

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<sup>14</sup> <http://www.ieso.ca/imoweb/pubs/ep/drillExercise.pdf>

## 13. Restoration Participant Attachment

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### 13.1 General

All *restoration participants* must submit a *restoration participant attachment* to the IESO. *Restoration participants* are obligated to:

- Ensure that the attachment information is correct
- Inform the IESO if they discover any errors
- Review the attachment at least annually and submit a revised attachment or a statement asserting that the review was completed and no changes were required

*Restoration participants* submit their initial restoration attachments as part of the market entry process. The annual statement of review or revised attachment should be sent to the Reliability Compliance Program.

### 13.2 Content

*Restoration participant attachments* must contain the following information. For ease of preparation, a check box is provided beside each item that must be included in your attachment, as applicable.

### 13.3 Facilities

- All *facilities* covered by the attachment are identified
- All *directly-connected facilities*, including control centres, that are pre-wired to accept backup/portable generation and loads that can be supplied from this source are identified
- All *facilities* with permanently installed emergency power generators and loads that can be supplied from this source are identified

### 13.4 Limitations

Any known condition that would prevent or restrict a *facility* from performing in accordance with the OPSRP must be identified when the *restoration participant attachment* is filed. This allows alternate strategies and operator training to be developed to mitigate the risk. These limitations are normally identified during the *facility* registration process and must be reflected in the *restoration participant attachment* or other means as agreed to by the IESO. The IESO will help *restoration participants* determine whether a potential limitation should be included in the attachment.

- Limitations identified

Examples of limitations:

- Inability to synchronize islands, whether by SCADA control, relay supervision, or manually
- *Transmission system* circuit breakers that cannot be used as an open point between two electrical islands
- *Generation units* that cannot energize transmission lines, because they do not have synch bypass capability or cannot operate under-excited
- *Generation facility* circuit breakers under a *transmitter's* direct operational control that cannot energize a transmission line by synch bypass

If a participant subsequently becomes aware of a *facility* limitation, they must report it using the normal protocols, e.g., directly to the *IESO* control room and through the *outage* management process. If the limitation is not of the type normally reported through these methods, they must report it to the *IESO* by the end of the next *business day*.

If the new limitation is expected to last for more than one week, the participant must:

- Submit a written notification to [marketentry@ieso.ca](mailto:marketentry@ieso.ca) within two weeks of its discovery
- Describe the limitation, its impact on restoration capability, and its expected duration

The *IESO* will help *restoration participants* determine whether an on-going limitation should be included in the restoration attachment. *Restoration participants* must immediately notify the *IESO* when any limitation is removed.

## 13.5 Testing Critical Components

*Restoration participants* with key facilities must meet the testing requirements described in the Testing section and must verify that they:

- Have a critical component testing program
- Have tested all their critical components in accordance with *NPCC* criteria
- Maintain test records

## 13.6 Supplemental Generation Supporting Key Facilities

*Restoration participants* with supplemental *generation units* that support key facilities must verify that they:

- Are able to place these *generation units* in service for their intended purpose, consistent with restoration plan priorities
- Have pre-arranged provisions to replenish fuel

## 13.7 Unattended Facilities

*Restoration participants* that operate *unattended facilities* on a restoration path must verify they:

- Have the capability to send staff to perform switching or troubleshoot problems that affect restoration.

## 13.8 Trained Operating Staff

*Restoration participants* must verify that they:

- Deliver a training program to operators, which includes their restoration obligations and expected actions, and is based on the equipment and tools that they operate
- Provide two hours of restoration-related training every two calendar years to their field switching personnel that perform unique restoration-related tasks that are outside their normal tasks
- Have shown due diligence in preparing their operators to fulfill their restoration obligations by ensuring they have attended restoration training within the last three years
- Maintain operator training records

*Restoration participants* that operate *certified black start facilities* must verify that they:

- Provide two hours of restoration-related training every two calendar years to any operating personnel responsible for performing startup of black start *generation units* and energization of the associated initial bus/circuit on the restoration path

## 13.9 Operating Agents

*Restoration participants* that use agents to fulfill any restoration-related operating obligations remain responsible for fulfilling those obligations, including training of the agents. In addition, the *restoration participant* must:

- Identify that agents are used and the *facilities* they operate
- Identify the agreements that govern the use of their operating agents

## 13.10 Contact Information

*Restoration participants* must provide the following contact information for their Restoration Plan Planning Coordinator:

- Name and/or position
- Phone number and email or mail address

*Restoration participants* must also ensure that their real-time *facility* location operator contact information is up-to-date. This is provided using the Facility Contacts form (IMO-Form- 1176).

**- End of Section -**

## 14. Maintaining the OPSRP

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### 14.1 OPSRP Review and Maintenance

The *IESO* is responsible for:

- Maintaining the OPSRP and ensuring that *restoration participants* receive all updates
- Performing an annual review of the OPSRP in consultation with *restoration participants*
- Filing the current OPSRP with the *Minister*
- Having an independent audit of the OPSRP performed, when directed by the *Minister*

### 14.2 Reasons for Revision

The OPSRP may require revision for any of the following reasons:

- Changes to standards, operating policies, or procedures
- Changes in grid configuration, black start facilities, *market participant* organizations, or *applicable law*
- Recommendations from drills and exercises or analysis of actual disturbance events
- Audit findings

### 14.3 Coordination with Other Reliability Coordinators

The *IESO* is responsible for:

- Sharing any updates to the OPSRP with all neighbouring Reliability Coordinators, so they can identify any conflicts with their restoration plans
- Reviewing neighbouring Reliability Coordinator restoration plans for conflicts with the OPSRP

- End of Section -

# 15. OPSRP Training Program Guidelines

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## 15.1 General

In order to meet the training obligations described in Section 13, *restoration participants* should consider designing their training programs to include the elements that support a systematic approach to training, namely:

- Task based learning objectives that:
  - Reflect the company specific restoration- related tasks operating staff are expected to perform to meet their obligations under the OPSRP
  - Address the required enabling knowledge - Includes the restoration plan objective, strategy, priorities, the role of the different types of restoration participants, and the relevant information for their participant type as described in Sections 5-10
- Verification – Assessment of knowledge transfer through some form of measurement such as tests, drills or exercises
- Training records

Participation in *IESO* sponsored restoration-related drills and exercises is recommended to help fulfill training requirements.

## 15.2 Training Topics

### Applicable to All Restoration Participants

- Understanding of roles and responsibilities of the *IESO*, *generator's*, *transmitter's*, distributor's and *connected wholesale customer's* operators
- Understanding of independent actions
  - Reasoning
  - Defined limitations of actions
- Understanding communications protocol during restoration
  - Normal communications
  - Contingency communications
  - Coordination of communications
- Understanding the priorities of the OPSRP
  - Restoration of critical *station service* loads
  - Restoration of customer loads to control voltage
- Understanding of the OPSRP principles and rules of thumb
  - Control magnitude of frequency excursions
  - Control magnitude of voltage excursions

## Generators

- Operation and correction of sustained high or low frequency
  - Sustained operation  $>60.2$  or  $< 59.8$
  - Securing of *generation units*
- Operation and correction of sustained high or low voltage
  - Automatic *AVR* response
  - Manual *AVR* response
- Independent actions on complete loss of potential (to the generating station)
  - Open all breakers under your direct operational control
  - Report conditions
- Effect on units when energizing transmission lines
  - *Generation unit* capability curves
  - Local bus voltage limitations
  - Circuit charging currents
- Identification of critical *station service* loads
  - Class IV Power
  - Shared switchyard *station service* loads
- Effect of loading of unit(s) during load restoration at remote site
  - Load blocks
  - 5% rule of thumb
- Communication needs
  - Loading rates
  - *Generation unit* operating curves
  - Station voltage limitations
- Frequency control
  - Governor set points
  - Load set points
  - Governor dashpot settings
- Parallel operation with a small number of units in an island
  - Governor speed droop
  - Stabilizer/*AVR* interaction
- *Certified black start facility* procedures
  - Switching procedures
- Station specific operating instructions
  - Switching procedures
  - Equipment idiosyncrasies

## Transmitters

- Independent actions on complete loss of potential to transmission stations or major portions of the *transmission system*
  - Open all breakers under your direct operational control
  - Report conditions
- Actions for securing *station service* if potential available
  - Battery chargers operable
  - Battery voltage acceptable
  - Priority *station service* loads restored
  - Back-up supply made available
- Calculations of line energization requirements (voltage and line charging currents) of circuits under their direct operational control
  - Operating Diagrams
  - Formulas
- Understand the coordination of switching and loading rates of units
  - Communication with the *IESO* and *generation facilities*
  - System configurations
- Paralleling procedures
  - Phase angle
  - Incoming vs. Running potential
  - Rotating scope
  - Adjusting generation
  - Flow across switch
  - Loading rates of *generation units*
  - Open-end voltage considerations
- PSR (Programmable Synchrocheck Relays) (understanding of changing read outs)
  - PSR commands (Abort, Sync Bypass, Execute Disable ON, Execute Disable Off)
  - Interface with RTU
  - Power supply
  - Potential value definition ('incoming' vs. 'running')
- Identification of critical *station service* loads
  - *Station service*
  - Telecommunication *facility station service* supply
  - Class IV power
- Station specific operating instructions
  - Switching procedures
  - Equipment idiosyncrasies

***Distributors and Connected Wholesale Customers***

- Independent actions on complete loss of potential to step down transformer station(s)
  - Open all breakers under your direct operational control
  - Report conditions
- Control Actions for abnormal frequency
  - UFLS relays – operation, connected load, reporting requirements, restoration
  - Manual Under-Frequency Load Shedding
  - Independent action for declining frequency
  - Reporting
  - Restoration of load automatically interrupted
- Voltage control
  - ULTC's
  - 3 & 5 % voltage reduction
  - kV > 15 % below normal
  - kV 10 -15 % below normal
  - kV > 15 % above normal
  - kV 10 – 15 % above normal
- Loading rates
  - Ramp rates of *generation units* and limitations
  - Restoration of load rules of thumb
- Identification of priority *station service* loads
  - *Station service*
  - Telecommunication *Facility station service* supply
- Station specific operating instructions
  - Switching procedures
  - Equipment idiosyncrasies

# 16. Definitions

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## Basic Minimum Power System (BMPS)

Consists of one or more generating stations, transmission lines, and substations operating in the form of an island for the purpose of initiating the restoration process

## Critical Component

Equipment required for continued and operation of a key facility in the event of a total loss of grid supply. Critical components include:

- Black start generating units
- Substation backup power supplies
- *Control centre* and telecommunication centre backup power supplies and computer systems
- *Control centre* and telecommunication centre computer room HVAC
- Telecommunications *facilities* backup power supplies
- Cable pressurization systems at or between key facilities

## Critical Power System Loads

Critical power system loads are those loads essential to perform restoration. Critical power system loads include AC and DC *station service* loads necessary to operate power system auxiliaries at control centres, transmission, generating, and step-down transformer stations. In some cases, these loads are also found within *distribution systems*. Examples of the types of auxiliaries supplied as critical power system loads include telecommunications, protective relaying, monitoring and control systems. During a restoration, other loads may be designated as critical power system loads if they are needed to proceed with restoration, such as for voltage control.

## Direct Operational Control

Direct operational control is the ability of a *restoration participant* to promptly operate equipment using remote or direct control, such as SCADA or hardwired benchboard control. Direct operational control does not mean the ability to locally operate equipment at its mechanism box or from a control room at an *unattended facility*, since neither of these options can occur promptly.

## Energize-Out

Energize-out describes the capability of a generating unit to be able energize its switchyard and/or transmission lines to the grid.

## Independent Actions

Independent actions are those operating actions required to enable power system restoration without prior communication to the *IESO* for approval.

**Key Facilities**

Key facilities are those that are required to establish a basic minimum power system following a system blackout. These *facilities* are essential to the restoration of the area and include:

- Generating stations having black start units
- Other selected generating stations
- Transmission elements that are part of the basic minimum power system
- *Control centres*
- Telecommunication centres
- Telecommunication *facilities* that are necessary to support protection and control *facilities*
- Voice and data between control centres
- Voice and data between control centres and key generating/transmission substations

**Priority Customer Loads**

Priority customer loads are important *consumer* loads that need to be restored promptly to mitigate the impact on public health and safety, the environment, or the economy. *Market participants* who are local distribution companies and *connected wholesale customers* need to identify their priority customer loads.

**Restoration-related Breaker**

A restoration-related breaker is any load interrupting device that is:

- Connected to the grid, including transformer secondary breakers, bus tie and feeder breakers at directly connected step-down transformer stations and,
- Is capable of being operated by direct operational control

**Step down Transformer Station**

A step down transformer station is one that is directly-connected to the grid and where power is reduced from *transmission system* voltage levels ( $\geq 50$  kV) to sub-transmission or distribution voltage levels to supply load.

- Note for the purposes of the OPSRP, distribution stations are excluded from this definition unless they have secondary breakers/reclosers/load interrupting devices that are remotely controlled.

# 17. References

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*Market Rules* Chapter 5

*Market Manual* 7.1 System Operating Procedures

*NPCC Directory* #8 Restoration

*NERC EOP-005* System Restoration Plans

*NERC EOP-006* System Restoration from Black Start Resources

**- End of Document -**