



**WHOLESALE ELECTRICITY SPOT MARKET
RULES CHANGE COMMITTEE**

RESOLUTION No. 2010-06

**Proposed Changes to the WESM Rules and Market Operator
Information Disclosure and Confidentiality Manual, Issue 1.0**

WHEREAS, the Market Operator Information Disclosure and Confidentiality Manual (the "Manual") provides the guidelines and procedures for the disclosure and protection of information received or generated by the Market Operator and WESM members;

WHEREAS, there is a need to amend the Manual to promote and enhance transparency in the WESM, to facilitate reconciliation of settlement data particularly between or among bilateral contract counterparties, and between Direct and Indirect WESM members and to minimize the occurrence of disputes among contract counterparties;

WHEREAS, on 13 March 2009, the PEMC Market Operations Group (MO) submitted their proposed amendments to the WESM Rules and Manual to the RCC, for discussion and approval;

WHEREAS, during the 28th RCC Meeting on 11 November 2009, the RCC agreed to prioritize for discussion all pending rules and manuals change proposals, which include the proposed changes to the Manual;

WHEREAS, during the 29th Meeting on 02 December 2009, the proposed amendments were presented to the RCC, for review and approval;

WHEREAS, during the said 29th RCC Meeting, the RCC approved the Market Information Catalogue, as attached in the Manual;

WHEREAS, upon the recommendation of the RCC to preserve the confidentiality of metering data used for settlement, the original provision of Section 4.8.4 of the WESM Rules is, thus, retained;

WHEREAS, during the 32nd RCC meeting on 07 April 2010, the RCC agreed to revise the proposed amendments to include personal undertaking by entitled recipients that will preclude them from divulging any confidential Market Information to unauthorized person/entity and without the consent of the Market Operator.

WHEREAS, during the 34th RCC Meeting on 02 June 2010, the RCC agreed to adopt the revised proposed amendments, incorporating the RCC comments/suggestions;

NOW THEREFORE, we, the undersigned and in behalf of the sector we represent, hereby resolve as follows:

RESOLVED, that the proposed amendments to the Market Operator Information Disclosure and Confidentiality Manual, as revised by the RCC, (attached as Annex "A"), is adopted and approved in full;

Just

RESOLVED FINALLY, that the proposed amendments to the Market Operator Information Disclosure and Confidentiality Manual be endorsed to the PEM Board for approval.

Done this 2nd day of June 2010, Pasig City.

Dot

Approved by :
RULES CHANGE COMMITTEE

Epictetus E. Patalinghug

Acting Chairperson

Independent

University of the Philippines
(UP)

Members:

Cherry Aquino-Javier

Generation Sector

AES Philippines

(AES)

Ralph T. Crisologo

Generation Sector

SN Abotiz Power

(SNAP)

Liberty Z. Dumlao

Generation Sector

Power Sector Assets and Liabilities Management

Corporation (PSALM)

Alfredo L. Licudine, Jr.

Generation Sector

National Power Corporation

(NAPOCOR)

Raul Joseph G. Seludo

Transmission Sector

National Grid Corporation of the Philippines

(NGCP)

Robinson P. Descanzo

Market Operator

Philippine Electricity Market Corporation

(PEMC)

Vicente C. Sioson

Distribution Sector (PDU)

Manila Electric Company

(MERALCO)

Augusto D. Sarmiento

Distribution Sector (PDU)

Dagupan Electric Corporation

(DECORP)

Jose P. Santos

Distribution Sector (EC)

Ilocos Norte Electric Cooperative

(INEC)

Conrado D. Pecjo

Supply Sector

Angeles Power, Inc.

Gloria P. Gerilla-Teknomo

Independent

CPI-Energy Phils., Inc.

Certified True and Correct:

Elaine D. Gonzales

RCC Secretary

PEMC

Proposed Changes to the WESM Rules concerning Information Confidentiality
RCC/WESM-09/01

Original Provision	MO Proposed Amendment		RCC-Approved Proposed Amendment	
	<i>On 13 March 2009</i>	Rationale		Remarks
<p>4.8.4 Confidentiality</p> <p>Subject to clause 4.7.3, <i>metering data</i> is confidential and each <i>WESM Member</i> and <i>Metering Services Provider</i> shall ensure that such data is treated as <i>confidential information</i> in accordance with the <i>WESM Rules</i>.</p>	<p>Subject to clause 4.7.3, <i>metering data</i> is confidential and each <i>WESM Member</i> and <i>Metering Services Provider</i> shall ensure that such data is treated as <i>confidential information</i> in accordance with the <i>WESM Rules</i>, <u>provided, however, that <i>metering data</i> used for determining settlement quantity pursuant to clause 3.13 may be disclosed to such persons and under such conditions as may be determined by the PEM Board.</u></p>	<p>Together with this proposal, an amendment to the WESM Manual on Market Operator Information Disclosure and Confidentiality is also being proposed. This proposed WESM Rule change is consistent with the proposed revisions in the said manual</p> <p>Disclosure of settlement data, which includes metering data used for settlement purposes is proposed primarily to promote and enhance transparency in the WESM.</p> <p>In addition, disclosure of meter data used for settlements will facilitate reconciliation of settlement data particularly between or among bilateral contract counterparties, and between direct and Indirect WESM members (represented in the WESM by direct members). This will also minimize the occurrence of disputes among contract counterparties.</p>	<p>Subject to clause 4.7.3, <i>metering data</i> is confidential and each <i>WESM Member</i> and <i>Metering Services Provider</i> shall ensure that such data is treated as <i>confidential information</i> in accordance with the <i>WESM Rules</i>, <u>provided, however, that <i>metering data</i> used for determining settlement quantity pursuant to clause 3.13 may be disclosed to such persons and under such conditions as may be determined by the PEM Board.</u></p>	<p>-Disapproved-</p> <p>Retain the original provision.</p> <p>The proposed rules change on the metering data is no longer relevant since the confidentiality of the metering information is retained, as provided for in the Information Disclosure and Confidentiality Manual. This is upon the recommendation of the RCC.</p>

Proposed Changes to Information Disclosure and Confidentiality Manual
RCC/WESM-09/02

Original Provision	MO Original Proposed Amendment		RCC-Approved Proposed Amendment	
	<i>On 13 March 2009</i>	Rationale		Remarks
<p>4.3 Information Considered as Confidential</p> <p>Without limiting the generality of the foregoing definition and criteria and subject to permitted disclosures set forth in this Manual and the WESM Rules, the following market information is confidential –</p> <p>xxx</p> <p>d) network data provided and classified by the System Operator as confidential information;</p> <p>e) metering installation information identifiable to a specific trading participant;</p> <p>f) raw, adjusted and edited metered data identifiable to a specific trading participant or WESM member;</p> <p>g) settlement amounts, settlement statements and any other information contained in such statements and other settlement information identifiable to a specific trading participant or WESM</p>	<p>d) transmission network data provided and classified by the System Operator as confidential information;</p> <p>e) metering installation information identifiable to a specific trading participant;</p> <p>f) raw, adjusted and edited metered data identifiable to a specific trading participant or WESM member;</p> <p>g) settlement amounts, settlement statements and any other information contained in such statements and other settlement information identifiable to a specific trading participant or WESM</p>	<p>For clarity on the scope of System Operator data</p>	<p>d) transmission network data or information provided and classified by the System Operator as confidential information;</p> <p>e) metering installation information identifiable to a specific trading participant;</p> <p>f) raw, adjusted and edited metered data identifiable to a specific trading participant or WESM member;</p> <p>g) settlement amounts, settlement statements and any other information contained in such statements and other settlement information identifiable to a specific</p>	<p>-Approved, as amended-</p>

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<p>member; h) default dispatch offer data of any trading participant or WESM member; i) bilateral contract data declared by or identifiable to a specific trading participant or WESM member; j) line rental information identifiable to a specific trading participant or WESM member; k) prudential security information identifiable to a specific trading participant; l) participant registration data, except specific information that are generally and publicly available from any other source.</p>	<p>member; h) default dispatch offer data of any trading participant or WESM member; i) bilateral contract data declared by or identifiable to a specific trading participant or WESM member; j) line rental information identifiable to a specific trading participant or WESM member; k) prudential security information identifiable to a specific trading participant; l) participant registration data, except specific information that are generally and publicly available from any other source.</p> <p>Information is already irrelevant. Default dispatch offer is no longer required in view of the approval by the ERC of a different administered price determination methodology and pricing and compensation methodology for must run units.</p> <p>It is proposed that some registration data be disclosed for transparency. <i>This is related to proposed revision to 4.4.1.</i></p>	<p>trading participant or WESM member; h) default dispatch offer data of any trading participant or WESM member; h) i) bilateral contract data declared by or identifiable to a specific trading participant or WESM member; i) j) line rental information identifiable to a specific trading participant or WESM member; j) k) prudential security information identifiable to a specific trading participant; l) participant registration data, except specific information that are generally and publicly available from any other source. k) <u>Information on real-time system condition contained in advisories and notices received by the Market Operator from the System Operator.</u></p> <p>Originally proposed under the classification of Information Considered as Not Confidential. Upon the recommendation of the RCC to move under the classification of Confidential Information as information on real-time system conditions is related to Transmission System Information which is classified as confidential.</p>
<p>4.4.1 Information Considered as Not Confidential</p>		

Original Provision	MO Original Proposed Amendment		RCC-Approved Proposed Amendment	
The following information are not confidential –	The following information are is not confidential –	Grammatical correction	The following information are is not confidential –	-Disapproved- Unnecessary correction.
New Provision under Section 4.4.1	e) <u>must run unit (MRU) generation prices</u> f) <u>substitute prices used for settlement of WESM transactions in trading intervals when there are pricing errors</u>	Information on clearing prices is considered as non-confidential, hence all information relating to prices should be considered non-confidential. In addition, the ERC requires MRU prices to be published and reported. This information was not included in the original list because this was not yet being generated at that time of the approval of the manual.	d) load forecast (WAP, DAP, <u>RTD</u>) and <u>actual system demand</u> e) <u>must run unit (MRU) generation prices</u> f) <u>substitute prices used for settlement of WESM transactions in trading intervals when there are pricing errors</u>	-Approved, as amended- Upon the recommendation of the RCC, actual system demand is included.
New Provision under Section 4.4.1	g) <u>net settlement surplus or deficit allocation identifiable to a participant</u>	ERC required the disclosure and publication of participant-specific Information on net settlement surplus/deficit allocation. This amendment implements this requirement. (ERC Order dated 9 April 2008, ERC Case No. 2006-007 RC -Price Determination Methodology Application)	g) <u>net settlement surplus or deficit allocation identifiable to a participant</u>	-Approved, as amended-
New Provision under Section 4.4.1	h) <u>participant registration data and changes thereto, specifically, the</u> <ul style="list-style-type: none"> <u>maximum generator capacity (Pmax),</u> <u>minimum generator stable loading (Pmin),</u> <u>generator ramp up</u> 	The participant registration data included in the list are generally static information (although these maybe revised). Disclosure of this information would not unduly prejudice the trading participants	h) <u>participant registration data and changes thereto, specifically, the -</u> <ul style="list-style-type: none"> <u>maximum generator generation capacity (Pmax),</u> <u>minimum generator generation stable</u> 	-Approved, as amended-

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	<p><u>and ramp down rates,</u></p> <ul style="list-style-type: none"> • <u>customer peak and off-peak loads,</u> • <u>other information that are generally and publicly available from any other source</u> 	<p><u>loading (Pmin),</u></p> <ul style="list-style-type: none"> • <u>generator ramp up and ramp down rates,</u> • <u>customer peak and off-peak loads,</u> • <u>other information that are generally and publicly available from any other source</u>
<p>New Provision under Section 4.4.1</p>	<p>i) <u>real-time system condition contained in advisories received by the Market Operator from the System Operator</u></p> <p>j) <u>Security limits and contingency limitations imposed by the System Operator which are submitted to the Market Operator, including but not limited to instructions to generating units designated as must run units - one (1) day after the relevant trading day</u></p> <p><u>This list is a non-exhaustive list.</u></p>	<p>i) <u>real-time system condition contained in advisories received by the Market Operator from the System Operator</u></p> <p>j) <u>Security limits and contingency limitations imposed by the System Operator which are submitted to the Market Operator, including but not limited to instructions to generating units designated as must run units - one (1) day after the relevant trading day</u></p> <p><u>This list is a non-exhaustive list.</u></p> <p>Moved to Section 4.3, Information Considered as Confidential (See RCC-approved changes Section 4.3 (k))</p> <p>Moved to Section 4.5, Expiration of Confidentiality (See RCC-approved changes in Section 4.5)</p> <p>-Approved-</p>

Original Provision	MO Original Proposed Amendment	RCC-Approved Proposed Amendment
		<p>confidential information. The purpose of providing the list is to clarify and to avoid doubt that, notwithstanding the definition, the listed data is not confidential.</p>
<p>4.5 Expiration of Confidentiality</p> <p>Bids and offers identifiable to a trading participants - thirty (30) days after the relevant trading day</p>	<p>Bids and offers identifiable to a trading participants, <u>including any and all information contained in the bids and offers information submitted by the relevant market participant</u> – thirty (30) one (1) days after the relevant trading day</p>	<p>This clarifies that the data that can be disclosed includes all the information which is submitted as part of the bid/offer submissions.</p> <p>The change in expiration period to one (1) day after is proposed. From experience, there does not seem to be any prejudice that may be caused by an earlier disclosure, particularly in view of the other information that is already available earlier such as information on marginal plants and dispatch schedules and prices.</p> <p>Bids and offers identifiable to a trading participants, <u>including any and all information contained in the bids and offers submissions information submitted by of the relevant market participant</u> – thirty (30) one (1) <u>seven (7)</u> days after the relevant trading day</p> <p>-Approved, as amended-</p> <p>Upon the recommendation of the RCC to extend the confidentiality period from the proposed 1 day to 7 days.</p>
<p>4.5 Expiration of Confidentiality</p> <p>Hourly energy or reserve dispatch schedules and dispatch instructions identifiable to a trading participant - - one (1) after the relevant trading day</p>	<p>Hourly energy or reserve dispatch schedules and dispatch instructions identifiable to a trading participant, <u>and the dispatch schedules of must</u></p>	<p>This is consistent with the intent of the WESM Rules to allow disclosure of dispatch schedules and prices the day after the trading day. MRU schedules</p> <p>Hourly energy or reserve dispatch schedules and dispatch instructions identifiable to a trading participant, <u>and the dispatch schedules of must</u></p> <p>-Approved-</p>

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	run units - one (1) after the relevant trading day	and prices is part of the dispatch schedules and prices data.	run units - one (1) after the relevant trading day	
New Provision under Section 4.5	<p><u>Settlement data identifiable to a specific trading participant or WESM member or non-WESM members that have WESM transactions - thirty days after the end of the relevant billing month - including -</u></p> <ul style="list-style-type: none"> ▪ <u>Settlement amounts</u> ▪ <u>Settlement prices</u> ▪ <u>Settlement quantities (i.e., metered, bilateral contract and spot quantities accounted for in WESM settlements)</u> ▪ <u>Bilateral contract data declared to the Market Operator, specifically the names of counterparties and the declared quantities)</u> ▪ <u>Line rental trading amounts</u> ▪ <u>Market fee rates and allocations</u> 	<p>Participant-specific settlement data is the only significant market data generated by the Market Operator that is not being disclosed and that has remained confidential without expiration.</p> <p>This amendment aims to enhance transparency of market information without, however, causing the participants undue prejudice that may arise due to early disclosure of commercially-sensitive information. Hence, expiration of confidentiality is proposed rather than removal from the list of confidential information.</p> <p>Recently, PEMC has been receiving requests for settlement data to be made available or accessible. It is also noted that some settlement data of some participants, such as WESM settlement prices, are occasionally being made public, which indicates that maintaining absolute confidentiality may not be very crucial. Disclosure by the Market Operator would allow</p>	<p><u>Settlement data identifiable to a specific trading participant or WESM member or non-WESM members that have WESM transactions - thirty days after the end of the relevant billing month - including -</u></p> <ul style="list-style-type: none"> ▪ <u>Settlement amounts</u> ▪ <u>Settlement prices</u> ▪ <u>Settlement quantities (i.e., metered, bilateral contract and spot quantities accounted for in WESM settlements)</u> ▪ <u>Bilateral contract data declared to the Market Operator, specifically the names of counterparties and the declared quantities)</u> ▪ <u>Line rental trading amounts</u> ▪ <u>Market fee rates and allocations</u> 	<p>-Disapproved-</p> <p>Upon the recommendation of the RCC to retain the confidentiality of settlement data. Settlement data is commercially sensitive information that should not be made public.</p>

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		a means to verify or validate published reports or disclosures from other parties.		
New Provision under Section 4.5			<u>Security limits and contingency limitations imposed by the System Operator and which are submitted to the Market Operator, including but not limited to instructions issued to generating units designated as must run units, and to system advisories – One (1) day after the relevant trading day</u>	
New Provision	<p><u>4.6 Permitted Disclosure</u></p> <p><u>Notwithstanding any contrary provision contained in this Manual, settlement data identifiable to a trading participant may be disclosed by the Market Operator prior to the expiration of its confidentiality status to the following -</u></p> <p><u>a) a trading participant in respect to the settlement data of its bilateral power supply contract counterparty or counterparties, whether or</u></p>	<p>This proposed addition allows disclosure of settlement data (even prior to the proposed expiration of confidentiality in the previous section) amongst or between bilateral contact counterparties, and between the direct WESM member and indirect/non- WESM member being for whom the direct WESM member is trading.</p> <p>This proposed permitted early disclosure facilitates the settlement of the transactions of these parties - particularly in respect to bilateral contract quantity declarations. This would, in turn, also minimize</p>	<p>4.6 Permitted Disclosure</p> <p>Notwithstanding any contrary provision contained in this Manual, settlement data identifiable to a trading participant may be disclosed by the Market Operator prior to the expiration of its confidentiality status to the following -</p> <p>a) a trading participant in respect to the settlement data of its bilateral power supply contract counterparty or counterparties, whether or</p>	<p>-Disapproved</p> <p>Any interested party can directly request for a copy of the confidential information from the owner of that information. The owner, at its discretion, may disclose the information.</p>

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	<p>not the latter is a Direct WESM Member, Indirect WESM Member or non-WESM member;</p> <p>b) a Direct WESM Member in respect to the settlement data of the Indirect WESM member and non-WESM member transacting in the WESM through the former;</p> <p>c) the DOE or ERC in relation to the performance of their respective policy-making and regulatory oversight functions over the WESM or the relevant trading participant; and</p> <p>d) other competent governmental agency having jurisdiction over a Trading Participant, including but not limited to the Bureau of Internal Revenue and Department of Trade and Industry, in relation to the performance of their regular functions.</p> <p><u>Settlement data covered by this permitted disclosure is the settlement amounts and trading amounts including energy, reserve and line rental</u></p>	<p>not the latter is a Direct WESM Member, Indirect WESM Member or non-WESM member;</p> <p>b) a Direct WESM Member in respect to the settlement data of the Indirect WESM member and non-WESM member transacting in the WESM through the former;</p> <p>c) the DOE or ERC in relation to the performance of their respective policy-making and regulatory oversight functions over the WESM or the relevant trading participant; and</p> <p>d) other competent governmental agency having jurisdiction over a Trading Participant, including but not limited to the Bureau of Internal Revenue and Department of Trade and Industry, in relation to the performance of their regular functions.</p> <p>Settlement data covered by this permitted disclosure is the settlement amounts and trading amounts including energy, reserve and line rental</p>

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	trading or settlement amounts, settlement quantity, meter data, bilateral contract data, settlement prices, and net settlement surplus data.		trading or settlement amounts, settlement quantity, meter data, bilateral contract data, settlement prices, and net settlement surplus data.	
<p>5.3 Permitted disclosures/exceptions to confidentiality</p> <p>Confidential information may be disclosed by the Market Operator or any WESM Member only to the recipients and under the circumstances permitted by WESM Rules clause 5.3.2 and other relevant provisions. Any such disclosure will not be considered a violation of the confidentiality policy under this manual or the WESM Rules.</p>	<p>Confidential information may be disclosed by the Market Operator or any WESM Member only to the recipients and under the circumstances permitted by WESM Rules clause 5.3.2, other relevant provisions <u>and this Manual.</u> Any such disclosure will not be considered a violation of the confidentiality policy under this manual or the WESM Rules.</p>	<p>We propose adding a permitted disclosure in the proposed Section 4.6 The inclusion of the reference to the Manual in this Section is to make this Section consistent with the proposed addition of Section 4.6.</p>	<p><u>5.3.1</u> Confidential information may be disclosed by the Market Operator or any WESM Member only to the recipients and under the circumstances permitted by WESM Rules clause 5.3.2, other relevant provisions <u>and this Manual.</u> Any such disclosure will not be considered a violation of the confidentiality policy under this manual or the WESM Rules.</p> <p><u>5.3.2 Confidential information may also be disclosed by the Market Operator to parties other than those enumerated in the previous Section upon prior written permission given by the WESM Member or participant whose confidential information is sought to be disclosed.</u></p> <p><u>5.3.3 The confidential</u></p>	<p>-Approved, as amended-</p>

Original Provision	MO Original Proposed Amendment	RCC-Approved Proposed Amendment		
			<p>information disclosed pursuant to the foregoing Sections shall, however, retain its confidentiality status and the recipient is obliged to maintain confidentiality as provided for in this Manual.</p>	
<p>5.4 Protection of permitted disclosures</p> <p>xxx</p> <p>5.4.2 The Market Operator may require the recipient to execute confidentiality and non-disclosure agreements or undertaking with terms and conditions consistent with this Manual and the WESM Rules. Such terms and conditions will include the undertaking to –</p> <ul style="list-style-type: none"> a) keep the information provided confidential, and not to disclose the same to any other person or entity; b) to use the information only for the purpose for which it is provided or for purposes permitted by the WESM Rules clause 5.3.2. 			<p>5.4 Protection of permitted disclosures</p> <p>xxx</p> <p>5.4.2 The Market Operator may shall require the recipient to execute confidentiality and non-disclosure agreements or undertaking with terms and conditions consistent with this Manual and the WESM Rules. Such terms and conditions will include the undertaking to –</p> <ul style="list-style-type: none"> a) keep the information provided confidential, and not to disclose the same to any other person or entity; b) to use the information only for the purpose for which it is provided or for purposes permitted by the WESM Rules clause 5.3.2. 	<p>-Approved-</p> <p>Upon the recommendation of the RCC to incorporate in the IDC Manual personal undertaking by entitled recipients that will preclude them from divulging any Market Information to unauthorized person/entity, the term “may” is replaced with “shall” to make this provision mandatory.</p>
<p>6.2 Means of Disclosure</p> <p>Market information will be made</p>	<p>Market information will be made</p>		<p>Market information will be made</p>	<p>-Approved-</p>

Original Provision	MO Original Proposed Amendment		RCC-Approved Proposed Amendment	
<p>available by the Market Operator through any of the following means -</p> <p>xxx</p> <p>c) Data sharing or file transfers of MMS-generated data and/or reports to the monitoring systems of the DOE, ERC and the PEMC Market Assessment Group.</p> <p>d) Market reports may be provided either in printed or electronic copies.</p> <p>The Market Operator may require the requesting party or recipient to pay for the reasonable cost of production, reproduction, printing or copying of the requested information or documents.</p>	<p>available by the Market Operator through any of the following means -</p> <p>xxx</p> <p>c) Data sharing or file transfers of MMS-generated <u>and other market</u> data and/or reports to the monitoring systems of the DOE, ERC, and the PEMC Market Assessment Group, <u>WESM members and other persons or entities</u>.</p> <p>d) Market <u>data and</u> reports may <u>also</u> be provided either in printed or electronic copies, <u>or by electronic means</u>.</p> <p>The Market Operator may require the requesting party or recipient to pay for the reasonable cost of production, reproduction, printing or copying of the requested information or documents, <u>or the cost of electronic transmittal or data transfer</u>.</p>	<p>Some market information is not generated from the Market Management System, but from other systems or is sourced from other entities.</p> <p>The purpose of the inclusion of the other recipients - WESM members and other entities - and other electronic means of transmittal is to provide for instances when these entities have installed their own data-retrieval or processing systems through which data is transmitted by PEMC.</p>	<p>available by the Market Operator through any of the following means -</p> <p>xxx</p> <p>c) Data sharing or file transfers of MMS-generated <u>and other market</u> data and/or reports to the monitoring systems of the DOE, ERC, and the PEMC Market Assessment Group, <u>WESM members and other persons or entities</u>.</p> <p>d) Market <u>data and</u> reports may <u>also</u> be provided either in printed or electronic copies, <u>or by electronic means</u>.</p> <p>The Market Operator may require the requesting party or recipient to pay for the reasonable cost of production, reproduction, printing or copying of the requested information or documents, <u>or the cost of electronic transmittal or data transfer</u>.</p>	
New Provision			<p><u>6.3 Classification of Disclosure of Market Information</u></p> <p><u>Classification or levels of</u></p>	<p>-Approved-</p> <p>Definitions of the different classification of Market</p>

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			<p><u>disclosure of market information are classified as follows -</u></p> <p><u>6.3.1 Strictly confidential information is confidential information which is not covered by the succeeding paragraphs or have not lost its confidentiality status pursuant to Section 4.4.2 of this Manual, relevant provisions of the WESM Rules and other relevant issuances. This information shall only be disclosed by the Market Operator to the data owner or under the exceptions provided for in WESM Rules clause 5.3.2 and this Manual.</u></p> <p><u>6.3.2 Confidential information with expiration of confidential status is information that loses its confidentiality status after a specified period as provided for in the WESM Rules, this Manual and other relevant issuances. While retaining its confidentiality status, this information may only be disclosed to the data owner or under the exceptions provided for in WESM Rules clause 5.3.2 and</u></p>	<p>Information Disclosure are added to serve as reference for the Market Information Catalogue.</p>

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			<p><u>in this Manual. This information becomes public information upon expiration of the specified period.</u></p> <p><u>6.3.3 Confidential information with permitted disclosure is confidential information but is permitted to be disclosed to qualified recipients. This information may only be disclosed to the data owner or qualified recipients pursuant to and under the conditions provided for in WESM Rules 5.3.2, Section 5 of this Manual and other relevant issuances that permits its disclosure. This information retains its confidentiality notwithstanding its disclosure to qualified recipients and the recipients are obliged to maintain confidentiality pursuant to the conditions set forth in Section 5 of this Manual.</u></p> <p><u>6.3.4 Public Information or non-confidential information is information which is not classified as confidential information and, as such, may be disclosed or provided to the general public.</u></p>	

Original Provision	MO Original Proposed Amendment		RCC-Approved Proposed Amendment	
<p>6.3 Updating of the Market Information</p> <p>a) Updates by the Market Operator</p> <p>The Market Operator will review and update the market information catalogue at least once every six months. The updated catalogue will be submitted for review and approval by the Rules Change Committee and the PEM Board.</p>	<p>The Market Operator will review and update the market information catalogue at least once every six months from time to time. The updated catalogue will be submitted for review and approval by the Rules Change Committee and the PEM Board.</p>	<p>It is proposed that a review of the market information catalogue be updated as necessary. This need not be made on a fixed schedule.</p>	<p>6.3 6.4 Updating of the Market Information</p> <p>a) Updates by the Market Operator</p> <p>The Market Operator will review and update the market information catalogue at least once every six months from time to time annually or as may be necessary. The updated catalogue will be submitted for review and approval by the Rules Change Committee and the PEM Board.</p>	<p>-Approved, as amended-</p> <p>Upon the recommendation of the RCC to set a specific period for the MO to review and update the market information.</p>
<p>Market Information Catalogue</p>		<p>The catalogue is updated to consider the following -</p> <ul style="list-style-type: none"> a) data actually available and currently being published or disclosed; and b) proposed revisions to the Manual 		<p>-Approved, as amended-</p>

Market Information Catalogue

Market Information			Information Access			
Category	Specific Information	Information/ Data Source	Classification	Recipient	Means of Provision	Publication Timeline
INPUT DATA						
Rules and regulatory information	Structure and Level of Market Fees	Market Operator	Public	Public	<ul style="list-style-type: none"> - WESM Website - Electronic or printed copies on request - Other means as required by the ERC 	Upon approval of the Structure and Level of Market Fees by the ERC
	Price Determination Methodology and Administered Price Determination Methodology and their revisions, including formulation of Market Dispatch Optimization Model	Market Operator	Public	Public	<ul style="list-style-type: none"> - WESM Website - Electronic or printed copies on request 	Upon approval by the ERC
Market Network Model and related information	Market Network Model Bus-Oriented Single Line Diagram	Market Operator	Public	Public	<ul style="list-style-type: none"> - WESM Website (MNM Documentation) - Electronic or printed copies on request 	Updated as necessary
	Registry of market trading nodes	Market Operator	Public	Public		
	List of customer pricing zones (CPZ) ¹	Market Operator	Public	Public		
	Reserve cost recovery zones	Market Operator	Public	Public		
	MMS Market Network Model Technical Data/Parameters	Market Operator	Confidential	Data owner and exceptions under WESM Rules	<ul style="list-style-type: none"> - Electronic or printed copies on request 	N/A

Market Information			Information Access			
Category	Specific Information	Information/ Data Source	Classification	Recipient	Means of Provision	Publication Timeline
				5.3.2.		
Registration and Market Participant Data	Registration Lists (e.g. list of participants/members, applicants and former members)	Market Operator	Public	Public	- WESM Website - Electronic or printed copies on request	Updated as necessary
	Generator Pmax, Pmin, Ramp Up and Ramp Down Rates	Market Participant	Public	Public	- Electronic or printed copies on request	Updated as necessary
	Customer Peak and Off-peak Demand	Market Participant	Public	Public	- Electronic or printed copies on request	Updated as necessary
	Prudential security information (i.e. trading limits, net exposure, prudential security deposit form and amount)	Market Participant/ Market Operator	Confidential	Data owner and exceptions under WESM Rules 5.3.2.	- Electronic or printed copies on request	N/A
Energy Forecast and Reserve Information	Hour-Ahead, Day-Ahead and Week-Ahead Demand Forecast and Reserve requirement	Market Operator/ System Operator	Public	Market Participants, DOE, ERC, PEMC	- MMS MPI	Daily or after relevant market run
				Public	- WESM website	
Generation Offers and Demand Bids	Energy and reserve offers and demand bids including all information contained in the submitted offers	Market Participants	Confidential with expiration (Confidentiality expires after seven days)	Prior to expiration of confidentiality: data owner and exceptions under WESM Rules	- Electronic or printed copies on request	N/A

Market Information			Information Access			
Category	Specific Information	Information/ Data Source	Classification	Recipient	Means of Provision	Publication Timeline
Transmission System Information provided by SO to Market Operator				5.3.2.		
				Public after expiration	- WESM website	Updated Daily (after expiration of confidentiality)
	Generator and Line Outages, Security Limits and Contingency Lists as submitted by SO to the MMS	System Operator	Confidential with Permitted Disclosure	WESM Trading Participants and exceptions under WESM Rules 5.3.2.	- WESM Website	Updated Daily
	Real-Time System Condition or System Operator Advisory on Transmission System conditions, including but not limited to, adverse system condition, outages, load shedding, congestions, and actual system demand based on system snapshot data, etc as provided by the System Operator	System Operator	Confidential with Permitted Disclosure (During trading day)	WESM Trading Participants and exceptions under WESM Rules 5.3.2.	- MMS Advisories/MMS MPI - E-mail	Published near real-time or as provided by the System Operator
			Confidential with expiration (Confidentiality expires after trading day)	Public after expiration	- Daily Market Operations Report	Updated Daily or upon availability of verified/complete information
	Must Run Unit Report as Prepared/Finalized by SO (i.e. generation unit, quantity and reason for designation)	System Operator	Confidential with expiration (Confidentiality expires after seven days)	Public after expiration of Confidentiality	- WESM Website - Electronic copies on request	Updated Weekly
Revenue Meter Data	Raw or adjusted meter data	Metering Services Provider	Confidential with permitted disclosure	Data owner, other permitted recipients (subject to sec.5.3.2 of this	- Electronic copies on request	N/A

Market Information			Information Access			
Category	Specific Information	Information/ Data Source	Classification	Recipient	Means of Provision	Publication Timeline
				manual) and exceptions under WESM Rules 5.3.2.		
OUTPUT DATA						
Energy and Reserve Schedules	WAP,DAP, RTD and RTX	Market Operator	Confidential with expiration (Confidentiality expires after trading day)	Market Participants, DOE, ERC, PEMC	- MMS MPI (WAP,DAP, RTD & RTX)	In accordance with the WESM Timetable
				Public after expiration of confidentiality	- WESM website (Real-Time schedules only) - Electronic copies on request	Updated Daily
Energy and Reserve Prices	WAP,DAP,RTD and RTX Prices	Market Operator	Public	Market Participants, DOE, ERC, PEMC	- MMS MPI (WAP,DAP, RTD & RTX)	In accordance with the WESM Timetable
				Public	- WESM website (Real-time prices only) - Electronic copies on request	Updated Daily
	Ex-Ante and Ex-Post Load Weighted Average Price (LWAP)	Market Operator	Public	Public	- WESM website - Electronic copies on request	Updated Daily
	Must Run Unit (MRU) generation prices	Market Operator	Public	Public	- WESM website - Electronic copies on request	Monthly, after issuance of final settlement

Market Information			Information Access			
Category	Specific Information	Information/ Data Source	Classification	Recipient	Means of Provision	Publication Timeline
	Administered prices	Market Operator	Public	Public	- WESM website - Electronic copies on request	Monthly, after issuance of final settlement
	Marginal plants and market clearing prices	Market Operator	Confidential with expiration (Confidentiality expires after trading day)	Public after expiration of confidentiality	- WESM website - Electronic copies on request	Updated Daily
	Substitute prices for PSM for Congestion related pricing errors	Market Operator	Public	Market Participants, DOE, ERC, PEMC	- MMS MPI - Electronic copies on request	Near real-time
				Public	- WESM website (Market Results Page) - Electronic copies on request	Updated Daily
Pricing Errors	Pricing error notice (PEN)	Market Operator	Public	Market Participants, DOE, ERC, PEMC	- MMS MPI - E-mail	As Applicable
				Public	- Electronic copies on request	
	Market Re-runs results (i.e. resulting market re-run prices)	Market Operator	Public	Public	- WESM Website - Electronic copies on request	As Applicable

Market Information			Information Access			
Category	Specific Information	Information/ Data Source	Classification	Recipient	Means of Provision	Publication Timeline
Settlements	Settlement amounts, including energy, reserve amounts identifiable to a specific trading participant or WESM member	Market Operator	Confidential	Data owner and exceptions under WESM Rules 5.3.2.	- Electronic Copies	N/A
	Quantities used for settlement (i.e. settlement-ready meter data, spot and bilateral contract quantities declared to the Market Operator) identifiable to a specific trading participant or WESM member	Market Operator	Confidential	Data owner and exceptions under WESM Rules 5.3.2.	- Electronic Copies	N/A
	Line rental trading amount and other line rental information identifiable to a specific trading participant or WESM member	Market Operator	Confidential	Data owner and exceptions under WESM Rules 5.3.2.	- Electronic Copies	N/A
	Net settlement surplus and deficit levels and allocations	Market Operator	Public	Public	- WESM website	Monthly, after the issuance of final settlement
Market Operator Performance	Market Operator Performance Indicators and Performance Report	Market Operator	Public	Public	- WESM Website	Annual

Note:

1\ Customer pricing zones have been made optional and is currently not implemented in the WESM. The inclusion of CPZ in this list is only for completeness purposes.