

CONFIDENTIAL



Independent Energy System Operator Nova Scotia

Integrated Resource Plan Request for Proposals

Closing Date: November 5, 2025

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Introduction

The Independent Energy System Operator Nova Scotia (“IESO Nova Scotia”) is the province’s independent, not-for-profit energy system operator. Created by the Nova Scotia legislature in 2024, IESO Nova Scotia is assuming responsibility for Nova Scotia’s bulk power system, including electricity system planning, grid interconnection assessments, procurement and real-time system operations.

As part of its responsibilities, IESO Nova Scotia will be creating, engaging stakeholders on, and publishing an Integrated Resource Plan (“IRP”). As a key input to developing its IRP process, IESO Nova Scotia is seeking proposals from qualified consultant firms to assess the current Nova Scotia Power Incorporated (“NSPI”) IRP development process and assess its effectiveness - drawing from best practices executed by other North American system operators and utilities responsible for long term power system planning. The consultant will also provide a set of recommendations for enhancements to the current IRP development process as it is transferred to IESO Nova Scotia.

Interested firms must demonstrate relevant experience, qualifications, and capacity to deliver high-quality services throughout the duration of the engagement.

Instructions to Proponent

1. All Proponents must submit a Technical Proposal and a Cost Proposal (collectively, the “Proposal”).
2. Proposals must be delivered to the following address: procurement@ieso-ns.ca.
3. Technical Proposal Submission Requirements:
 - a. Proponents must submit one PDF document containing the Technical Proposal via email to procurement@ieso-ns.ca.
 - b. The Technical Proposal must not contain any cost or fee information. Proposals that include pricing information in the Technical Proposal may be disqualified.
4. Cost Proposal Submission Requirements:
 - a. Proponents must submit one PDF document containing the Cost Proposal as detailed in **Appendix A** of this Request for Proposals (“RFP”).
 - b. The Cost Proposal must be submitted separately from the Technical Proposal via email to procurement@ieso-ns.ca.
5. The deadline for receipt of all Proposals via e-mail to IESO Nova Scotia is 4:00p.m. Atlantic Standard Time, November 5, 2025. Proposals submitted after this time may be disqualified.

Questions & Clarifications

1. To introduce the RFP and address any initial questions, IESO Nova Scotia will conduct an RFP Kick-Off Call (virtual) on October 17, 2025 at 11:30 am Atlantic Daylight Time. Potential proponents that wish to participate in the call should email procurement@ieso-ns.ca to register for the call.
2. Following the kick-off call, potential respondents can submit questions to IESO Nova Scotia to clarify any issues in the RFP. IESO Nova Scotia will respond only to questions submitted through e-mail via procurement@ieso-ns.ca. Telephone questions will not be accepted. All emailed questions must be received by October 22, 2025.
3. IESO Nova Scotia will not respond to questions related to the Integrated Resource Planning process.
4. All RFP-related questions and answers will be consolidated into a single Q&A document.
5. The Q&A document will be posted on the IESO Nova Scotia website on or after October 29, 2025. This will be the only distribution method for the Q&A document.

Timeline

The following timeline is an estimate and may be adjusted at IESO Nova Scotia's discretion any time during this procurement process.

Posting of RFP on IESO Nova Scotia website	October 15, 2025
RFP kick-off call (initial Q&A)	October 17, 2025
Deadline for questions submitted by email	October 22, 2025
Posting of Q&A document (if required)	October 29, 2025
RFP addendum (if required)	October 29, 2025
Deadline for submitting complete Proposals	November 5, 2025
Contracted work commences	December 8, 2025
Latest date to complete contracted work	March 1, 2026

Proponent and IESO Nova Scotia Roles and Responsibilities

1. IESO Nova Scotia reserves the right to modify the RFP contents and requirements at any time prior to the submission deadline.
2. It is the responsibility of the Proponent to ensure compliance with all requirements and deadlines. Proposals which are not in compliance with the RFP requirements may be disqualified.
3. It is the responsibility of the Proponent to ensure delivery of all required Proposal submission material.
4. IESO Nova Scotia assumes no responsibility for technological or logistical issues in submitting the Proposal.
5. All proposals will be reviewed to determine if they satisfy the mandatory criteria in this RFP. Proposals not satisfying the mandatory criteria will be rejected.
6. IESO Nova Scotia has no express or implied obligation to any potential Proponent with respect to the costs of preparing and presenting a Proposal in response to this RFP. All such costs will be the sole responsibility of the Proponent.
7. IESO Nova Scotia may, in its sole discretion, select one or more Proponents for further evaluation, including by way of interview, presentation, demonstration, or request for references. The results of these evaluations may result in the Proposal being removed from further consideration.
8. IESO Nova Scotia reserves the right to award all, part, or none of the contract which is the subject of this RFP. IESO Nova Scotia reserves the right to disqualify any or all proposals submitted. If none of the proposals are satisfactory to IESO Nova Scotia, no selection will be made.
9. The Proponent is bound by the information and representations contained in any Proposal submitted. The Proposal is deemed to be a binding offer on the part of the Proponent. The Proposal is valid for 6 months from date of submission.
10. Submission of a proposal in response to this RFP indicates the Proponent's acceptance of the terms and conditions contained within this RFP.
11. By submitting an RFP proposal to the IESO Nova Scotia, the Proponent accepts that the inclusion of any misleading or false information in a Proposal may be grounds for disqualification from consideration or termination of any resulting contract.
12. Proposals submitted in response to the RFP are the property of IESO Nova Scotia.
13. The act of submitting a Proposal under this RFP includes the implied condition that no finder's fee or finder's commission has been paid or shall be paid to any individual or organization from the establishment of this investment relationship with IESO Nova Scotia.

14. If a Proponent intends to subcontract any of the required services, this must be disclosed in the Proposal.

Scope of Work - Integrated Resource Plan Process Review

IESO Nova Scotia is seeking proposals from qualified consultant firms to assess effectiveness of the current NSPI IRP development process. The successful Proponent will draw from best practises executed by other North American system operators and utilities responsible for long term power system planning. The consultant will also provide a set of recommendations and observations about NSPI's current IRP development process to aid IESO Nova Scotia in developing and executing its own IRP process.

The successful Proponent will be responsible for assessing NSPI materials. NSPI last produced an IRP in 2020. The 2020 IRP was subsequently updated through the publication of the Evergreen IRP in 2022 and the IRP Action Plan Update in 2025. Information regarding the 2020 IRP, the 2022 Evergreen IRP, and the 2025 IRP Action Plan Update can be found in a number of publicly available sources including this link: <https://www.nspower.ca/irp>

The successful Proponent's assessment of NSPI's IRP materials, referenced above, and the preparation of recommendations and observations to aid IESO Nova Scotia in developing and executing their IRP process, should be guided by the following core objectives of an IRP process:

- Clear and credible processes - to capture the current state of the power system, forecast future demand and supply, assess gaps, and extract solution(s) comprising an evolved resource mix - including timing;
- Robust and integrated solution(s) - the generation and transmission planning solution(s) must:
 - clearly articulate the power system needs that must be addressed - to guide procurement;
 - be an integrated solution - collectively addressing needs for transmission, generation capacity, generation energy and reliability services (also known as ancillary services) that provide the foundation for a reliable power system; and
 - be stress-tested across a variety of reasonable scenarios to test the variability of outcomes to changes in assumptions;
- Effective engagement - engage with stakeholders with expertise and an interest in the electricity sector through education, clear statements of relevant

information including input assumptions and modelling approaches, timely input opportunities, and clear communication on how feedback is incorporated; and

- Timely process - balancing the requirements of clear and credible processes, robust and integrated solutions and effective engagement with the need to articulate and take prompt action driven by IRP outcomes to ensure a reliable, affordable and clean power system.

The consultant's assessment should include, but not be limited to, the following key technical activities of an IRP process:

- Development of a long-term 20-year demand forecast including the value of top-down versus bottom-up methods of forecasting demand;
- Assessment of the state of the current Nova Scotia resource fleet, including potential retirements due to age of equipment or legislative requirements (e.g. phase out of coal);
- Assessment of future capacity and energy needs, including both peak day capacity assessments and hourly energy assessments for each hour of the year;
- Assessment of the state of the current Nova Scotia high voltage transmission system, including its ability to maintain voltage within equipment limits;
- Assessment of future transmission expansion requirements to serve Nova Scotia's forecasted load, including its ability to deliver energy from generation to load as both the demand profile changes and as generation is added/retired;
- Identification of modelling approaches for transmission, generation capacity, generation energy and ancillary assessment assessments, including review of modelling tool(s) to execute a least cost assessment of future supply options and to articulate system needs;
- Development and validation of key modeling assumptions, including but not limited to, capacity value of different electricity supply technologies, potential for demand response and other forms of distributed energy resources to reduce electricity demand, costs to maintain existing generation assets, and cost and timing to build and operate new generation resources;
- Assessment of the state of reliability in Nova Scotia, including system operability and the need for and capability to deliver reliability services (also known as ancillary services);
- Identification of reasonable modelling scenarios to test sensitivity of outcomes to alterations of key assumptions; and
- Development of a final report that effectively communicate outcomes of the IRP process.

The consultant should also address as part of their assessment:

- Effective engagement of key stakeholders: development, communication and execution of a structured approach for engaging stakeholders with an interest

and expertise in the electricity sector, with a goal of educating, informing, receiving and recording feedback and integration of feedback in the development of the IRP - and striking the right balance between effective engagement and moving the planning process forward in a timely manner.

- Effective engagement with the Regulator: review of existing interactions with the Nova Scotia Energy Board, including elements required to be filed or approved; interaction with consultants that represent the Board; and practices for documenting and presenting the IRP process and outcomes to the Nova Scotia Energy Board.
- Timing, breadth and cadence: provide thoughts regarding duration of process (i.e. how many months to run an IRP process), cadence of IRPs and breadth (full IRP vs interim/updated IRPs).

The consultant is expected to complete the work no later than March 1, 2026.

Project activities are expected to include:

- A project kickoff meeting on or around December 10, 2025;
- The consultant's identification of refined data requests and meeting requests to successfully complete the contract; and
- The Proponent's execution of a plan to gather feedback from stakeholders including NSPI, typical regulatory intervenors, IESO Nova Scotia and other relevant parties.

Project deliverables include:

- A report that describes the consultant's work, observations and recommendations on NSPI's IRP development process;
- Review, edits and added polish to the IESO Nova Scotia's draft IRP Terms of Reference document; and
- A presentation to IESO Nova Scotia staff on key observations and recommendations in the above-mentioned report.

Mandatory Technical Proposal Submission Requirements

Proponents are required to submit a detailed Technical Proposal indicating their understanding of the work required and their ability to complete it.

The Technical Proposal must include the following components:

- Experience and Capability to Perform the Work
 - A narrative summarizing the Proponent’s understanding of the engagement, including initial data requests.
 - A summary of the Proponents experience, including:
 - Understanding of bulk power system planning processes - including the development of an Integrated Resource Plan - at North American electric utilities or independent system operators;
 - Familiarity with the design and operation of high-penetration inverter-based resource power systems subject to the requirements of the Northeast Power Coordinating Council Inc. and the North American Electric Reliability Corporation; and
 - A list of the Proponent’s personnel that would be working on the engagement including their qualifications and experience, and an estimated breakdown of the time each personnel will spend on the engagement.
- Proposed Approach and Deliverables
 - A summary of the Proponent’s proposed approach to complete the work;
 - A high-level work plan;
 - Interim deliverables proposed by the Proponent; and
 - A draft table of contents for the final report to be prepared by the Proponent.
- Schedule and Milestones
 - A schedule of activities, including timing to deliver a final report and summary presentation, and any interim milestones proposed.
- Conflict of Interest
 - Disclosure of any possible conflicts of interest.
- Canadian Business Status
 - A declaration that the Proponent is a Canadian Business, if applicable. A Canadian Business is defined as a business who meets at least one of the following requirements:
 - The business’ primary address is located in Canada; or
 - The business is a registered sole proprietorship, partnership, or corporation in Canada, either federally or provincially.
 -

Cost Proposal Submission Requirements

Proponents are required to submit a detailed pricing schedule for the provision of IRP process review services. The pricing schedule **must clearly outline a fixed price** to complete the work. All Cost Proposal submissions must consider the instructions and include the information required as outlined in Appendix A to this RFP.

To ensure fairness and consistency in evaluation, the Cost Proposal must be submitted as a separate document from the Technical Proposal.

The proposed pricing structure will be evaluated based on clarity, completeness, cost-effectiveness, and alignment with the proposed scope of work.

Evaluation Process and Controls

Each response to this RFP will be evaluated by IESO Nova Scotia to determine the degree to which it responds to the requirements set out.

The evaluation criteria will be divided into the following categories:

Technical Proposal Evaluation Categories

- Experience and Capability to Perform the Work (25 points)
 - Understanding of Engagement
 - Integrated Resource Plan Experience
 - Consulting Firm Personnel Qualifications and Experience
- Proponent declares Canadian Business Status (5 points)
- Proposed Approach and Deliverables (30 points)
- Schedule and Milestones (10 points)

Technical Proposals will be assessed based on information provided by the Proponent at the time of submission as well as any clarification provided during any subsequent communication with the proponent, including but not limited to interviews, reference checks, site visits, demonstrations, required at IESO Nova Scotia's sole discretion.

Cost Proposal Evaluation Categories

- Fee (30 points)
 1. To ensure that the successful Proponent has the technical capability to effectively complete the Scope of Work, a Proponent must score at least 42 points on the Technical Proposal Evaluation categories before IESO Nova Scotia will proceed to the Cost Proposal Evaluation. A Proposal that does not achieve at least 42 points in the Technical Proposal Evaluation may be disqualified.
 2. IESO Nova Scotia reserves the right, but will have no obligation, to request additional information from one or more Proponents, including references, prior to the selection of the preferred Proponent or prior to entering into a Contract with a Proponent.

3. IESO Nova Scotia's evaluation process and selection of the preferred Proponent may include consideration of any information in the public domain, information provided by Proponents' references, any information provided by third parties, and any information relating to prior or existing contracts, disputes, or dealings between Proponents and IESO Nova Scotia or any predecessor of IESO Nova Scotia.
4. The preferred Proponent must have the financial capability to undertake the services outlined in this RFP. Prior to entering into a contract with a Proponent, IESO Nova Scotia may require the Proponent to provide detailed financial information to demonstrate and confirm its financial capability. IESO Nova Scotia may choose not to enter into a contract with any Proponent that is unable to demonstrate its financial capability to the reasonable satisfaction of IESO Nova Scotia.
5. Award of any contract resulting from this RFP may be subject to IESO Nova Scotia's approval, and budget considerations.

No Representations, Warranties, or Exclusivity

IESO Nova Scotia makes no representation, warranty or guarantee as to the accuracy of the information contained in this RFP or issued by way of addendum, including the value or volume of work to be acquired. Any quantities shown or data contained in this RFP or provided by way of addendum are estimates only and are for the sole purpose of indicating the general volume of the work. It is the responsibility of each prospective Proponent to avail itself of all information necessary to prepare a proposal in response to this RFP.

Any contract executed in connection with this RFP will not be an exclusive contract for the provision of the Services. IESO Nova Scotia may contract with others for the same or similar services or may obtain the same or similar services internally.

Conduct

Conflict of Interest

Proponents must not engage in any activity or communication that would constitute or create a conflict of interest.

IESO Nova Scotia may disqualify a Proponent for:

- any conduct, situation or circumstance that constitutes a real or perceived conflict of interest as determined by IESO Nova Scotia;
- a failure to disclose an actual or potential conflict of interest;

- a failure to comply with any requirement prescribed by IESO Nova Scotia in connection with resolution of a conflict of interest; or
- a situation or circumstance in which the Proponent’s conflict of interest cannot be resolved.

Illegal or Unethical Conduct

Proponents must not engage in any illegal bidding practices, including conspiracy, bid-rigging, price-fixing, bribery, fraud or collusion. Proponents must not engage in any unethical conduct, including lobbying or other inappropriate communications, the offer or provision of gifts to IESO Nova Scotia employees, officers or board members, deceitfulness, submitting Proposals containing misrepresentations or other misleading or inaccurate information, or any other conduct that compromises or may be seen to compromise the integrity of the Proponent, the RFP, or the competitive procurement process.

IESO Nova Scotia may disqualify a Proponent from the RFP process if that Proponent engages in any of the foregoing activities or conduct, or if that Proponent’s proposal contains a misrepresentation or any inaccurate, misleading or incomplete information.

Confidentiality

The Proposal shall clearly identify any information that the Proponent considers to be proprietary or confidential (“Confidential Information”), including but not limited to commercial, financial, labour relations, or technical information. IESO Nova Scotia will endeavor to protect all Confidential Information from public disclosure wherever possible. However, the IESO Nova Scotia does not guarantee the confidentiality of any information included in a Proposal to the extent that such information may be subject to disclosure under existing privacy legislation.

Cancellation of RFP

IESO Nova Scotia reserves the right to cancel this RFP at any time.

Default

IESO Nova Scotia may, by notice of default to the Proponent, terminate the whole or any part of the Contract if the Proponent fails to deliver the services within the time specified, to perform any other provisions of the contract, or to meet any of the requirements outlined in this RFP.

Should IESO Nova Scotia terminate the contract in whole or in part, IESO Nova Scotia may procure services similar to those so terminated, and the Proponent shall be liable to IESO Nova Scotia for any excess costs for such similar services.

The Proponent shall not be liable for any excess costs if failure to perform the Contract arises by reason of Force Majeure.

Appendix A - Proponent Cost Bid Sheet

NAME OF FIRM: _____

ADDRESS: _____

PHONE: _____ FAX: _____ E-MAIL: _____

NAME OF PERSON SIGNING FOR FIRM: _____

POSITION OF PERSON SIGNING FOR FIRM: _____

General Instructions

Proponents are requested to provide a cost breakdown aligned with their proposed approach. The table below offers a suggested format to help organize costs by role and task/deliverable. However, proponents are welcome to modify, expand, or restructure the format to better reflect their methodology, team composition, or pricing model.

Please ensure the breakdown includes:

- Estimated hours and hourly rates for each key task or deliverable;
- Total cost per task and overall project cost;
- Any assumptions, exclusions, or optional services;
- Hourly rates by role or personnel category;
- A proposed payment schedule aligned with project milestones; and
- Any additional tasks or deliverables not listed.

Cost Breakdown by Task or Deliverable

Role	e.g. Project Manager	e.g. Senior Consultant	e.g. Consultant	Total Cost (CAD) =Sum (hourly rate * Est Hrs)
Hourly Rate (CAD)	\$	\$	\$	
Task/Deliverable	Estimated Hours	Estimated Hours	Estimated Hours	
Assessment of initial IRP start-up activities including the development of terms of reference and goals for the IRP				
Assessment of the state of the Nova Scotia power system including generation, transmission and ancillary services				
Assessment of modelling scenarios and approach				

Assessment of processes to develop input assumptions - including demand forecast, cost and availability of resources, import/export, distributed energy resources				
Assessment of the approach to engage stakeholders effectively				
Assessment of the approach to interact with the Regulator effectively				
Assessment of IRP timing, cadence and breadth				
Assessment of the approach to summarize and present IRP modelling results and outcomes				
Project administration - including kick-off meeting, update meetings, preparation of any interim deliverables, delivery of final report and presentation				
Any other tasks not specified above (proposal to articulate additional tasks)				
Total Fixed Cost:				

NOTE: If fees are to be charged for any services in addition to the proposed fee for all services as outlined in the Scope of Work, they must be clearly identified (use an additional sheet) and agreed upon before commencement of the service. Where no additional fee is quoted, it is deemed to be included in the total fixed cost.

Additional Fees? YES_____ (additional sheet attached) NO_____

DESIGNATED PROJECT MANAGER:

Name: _____

Position: _____

Phone Number: _____

RETURN THIS SHEET WITH YOUR COST PROPOSAL