

A stylized graphic of a compass rose, rendered in a light blue color. It features a circular arc and a diagonal line intersecting at the center, creating a crosshair-like effect.

NAVIGATOR

Continued Success

CUSTOMER SATISFACTION SURVEY RESULTS

INDEPENDENT ELECTRICITY SYSTEM OPERATOR

CONTINUED SUCCESS

EXECUTIVE SUMMARY

Navigator again had the privilege of completing the IESO's customer satisfaction survey this year. We are pleased to be able to report that the IESO continues to enjoy a very high satisfaction ranking virtually across the board again in 2007. IESO customers believe that the system operator is a competent, technical organization which plays a leading role in the Ontario electricity sector as a whole. Many believe that the IESO is the one place they can turn to for unbiased and sound advice on the sector, its operations, and what that means for their businesses.

We saw continued strong rankings in core mandates of the IESO like reliability, as well as some improved rankings on the stakeholder process. We also saw that changes to some communications products over last year, most notably the Weekly Bulletin, have been widely accepted and enjoy high readership and awareness.

Similar to last year, we saw some concern surrounding the IESO's role in smart meters as well as the emergence of a new trend with the questioning of the IESO's role in reliability for Ontario. While efforts to streamline administrative process have been appreciated by your customers, we continue to see some concern around the amount and frequency of the administrative burden on your customers.

It should be noted that the customer survey this year was split into two distinct parts for the first time. This year Navigator completed a series of one-on-one interviews as was done in the past, but in contrast, these interviews did not include quantitative questions. For the first time, Navigator used an on-line survey to complete the quantitative portion of the work.

In its totality, the IESO is doing very well in the eyes of its customers, especially given its status as a monopoly. The IESO should be proud of its work again this year.

NAVIGATOR'S MANDATE

Navigator was asked by the IESO to complete the 2006 customer survey as a result of a competitive RFP process. We were tasked with the creation of the survey, as well as conducting the survey, interpreting the results, and presenting our conclusion and recommendations to the IESO as it moves forward.

Building on our work in 2006, Navigator was again asked to complete the IESO's customer survey for 2007. As with last year's work, we were asked to continue to track the year over year quantitative results of the opinions of IESO customers. We were also asked to continue our work in providing an overall determination of the value that IESO provides its customers, identification of areas for improvement, and an assessment of the IESO's relationship with its customers. Additional research objectives for this year's

work also included an exploration of the areas of concern raised in the 2006 customer survey.

NAVIGATOR'S APPROACH

Navigator, together with the IESO, decided to take a slightly different approach to the customer survey this year than in previous years. When we began last year's work, we attempted to mix quantitative questions for tracking purposes into the discussion guide for the qualitative portion of the survey. While our work revealed some interesting findings and still allowed us to track numbers over time, we found that mixing the two types of research within the same discussion guide led to a less-than-optimal interview process for both Navigator professionals conducting the work and the IESO customer taking part.

This year, we decided to take a different approach and separate the survey work into two portions. In conjunction with the IESO, we developed a survey guide for the discussion with the customer to provide the qualitative results. This guide was absent of any quantitative questions. For tracking purposes, we developed a stand alone quantitative survey and conducted an on-line survey of the customers.

We posted the on-line survey and sent a request to all of the IESO's 300+ customers to complete the questionnaire. We received a good response rate with over 80 IESO customers taking the time to voluntarily complete the questionnaire. Not only was the response rate good, but we have dramatically increased the number of respondents on the quantitative survey over what we have had in previous years. On average, this survey took participants less than 10 minutes to complete.

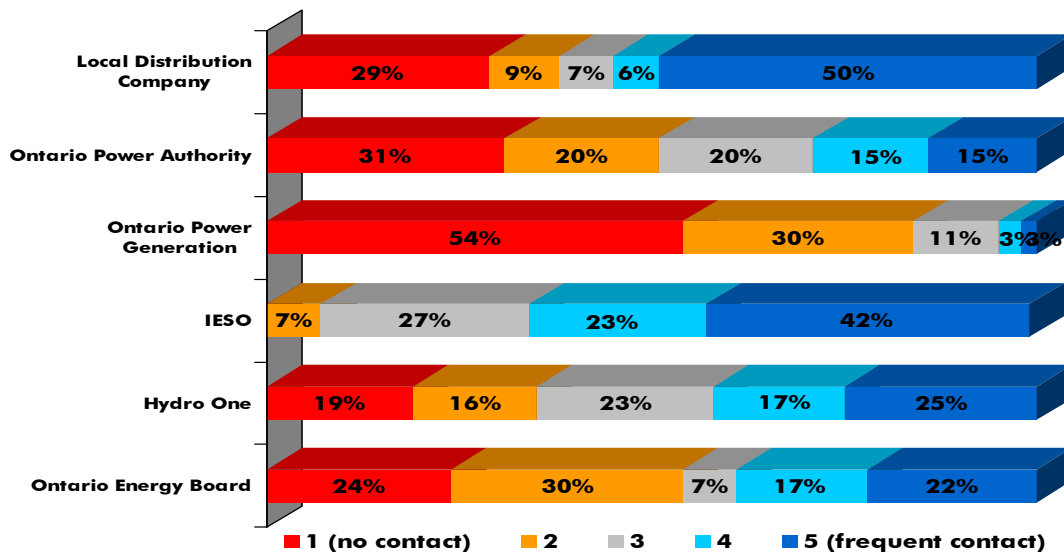
Navigator also randomly selected customers from each of the customer types for participation in the qualitative portion of the survey. This portion of the work required more time for the participant to complete. Customers were asked to dedicate 30 minutes for each of the interviews with Navigator research professionals. In the absence of the quantitative portion of the work, we were able to have a better discussion with customers in a shorter amount of time than last year's average of 40-45 minutes. Navigator conducted 51 interviews with IESO customers this year.

QUANTITATIVE RESULTS

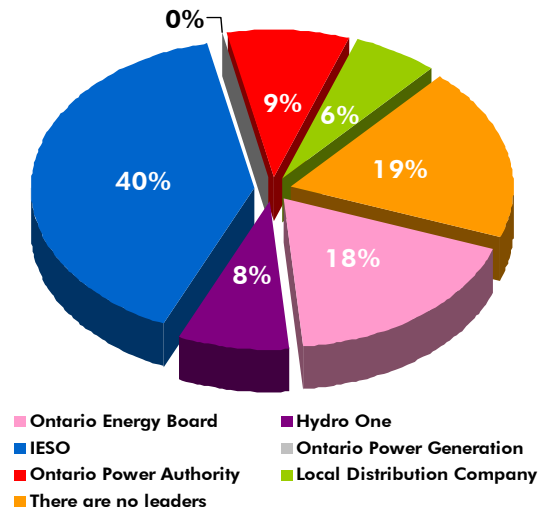
In previous years, the quantitative component of the survey has been used mainly for tracking purposes. The year over year graphs have helped to give some indication and historical context for the IESO's progress in certain key areas of its mandate. Those charts, as well as some new results are listed below, and while we stand by the numbers and the methodology we used to obtain them, it should be reiterated here that the on-line component was new for this year and may have some impact on the numbers. Also, Navigator noticed that we received more participation using the on-line approach this year than combining the quantitative within the one-on-one interview process as has

traditionally been done. When we looked deeper at the numbers, we also saw that those who have not traditionally responded to our requests for participation, did take the time to fill out the on-line survey indicating that the results represent a different pool of people than we saw last year. These factors should be kept in mind when reviewing our findings for this year.

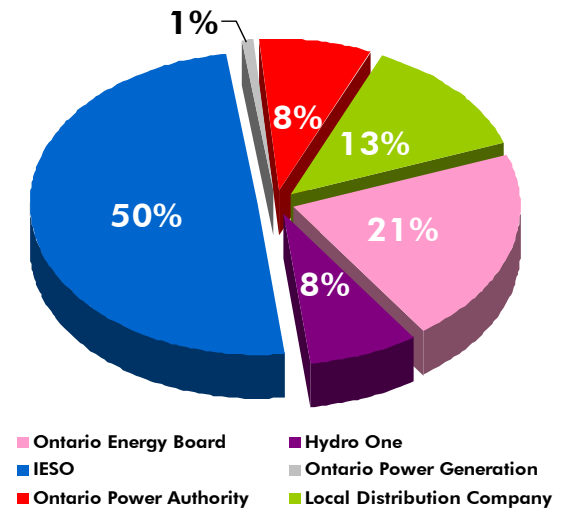
We began the survey by asking how often IESO customers were in touch with others in the Ontario electricity sector. We asked participants to rank, on a scale of 1 to 5, their level of interaction with their LDC, the OPA, OPG, Hydro One, the OEB, and the IESO. For the purposes of the rankings, a response of 5 was considered frequent contact, while a score of 1 was considered no contact at all. As you can see from the illustration of the results, the IESO is second only to the participant's LDC in the frequency of contact.



We then asked participants to indicate which of the groups from the previous question they look to as a leader in the electricity sector in Ontario. Similar to what we have seen in previous years, and other work for the IESO, we heard that 40% of those asked felt that the IESO was a leader in the sector. This is particularly good news for the IESO not only because of the fact that these are your customers, but also because those we spoke with had such a high level of interaction with the IESO as indicated by the chart above. For the purposes of scale, the IESO was the most listed as a leader while we note that the second most selected was no leader in the sector, with an incidence rate of 19%.

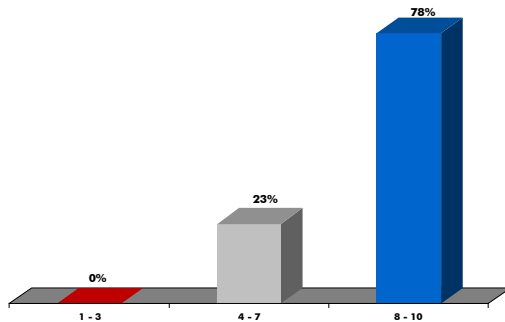


In our previous work with the IESO, we have frequently seen that the provision of credible information on the sector as a whole was one of the most mentioned attributes for the IESO. We asked participants to indicate which of the organizations they looked to for this credible advice and a full half of participants indicated that the IESO was such a place.

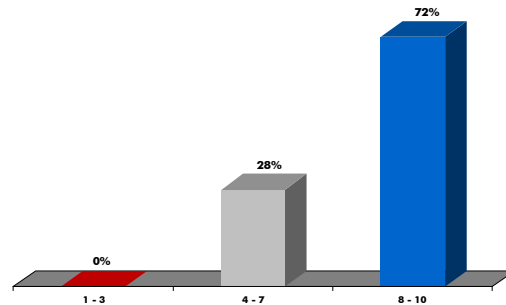


In our work this year, we asked participants to indicate their level of satisfaction with the staff that they are in contact with at the IESO. As you can see from the results, the front line staff continue to be the best ambassadors for the IESO. More than two-thirds, a full 78% of those we surveyed indicated that they would rank their satisfaction an eight or higher indicating a very high level of satisfaction. In addition, we found that the interaction with IESO front line staff was not only appreciated by customers, but a vast majority, 72% of those who completed the survey indicated that the service was timely as well.

Satisfaction

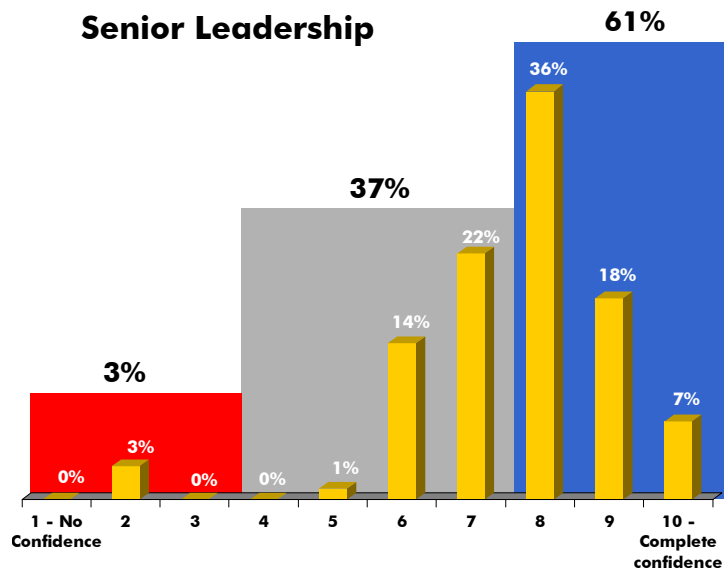


Timeliness

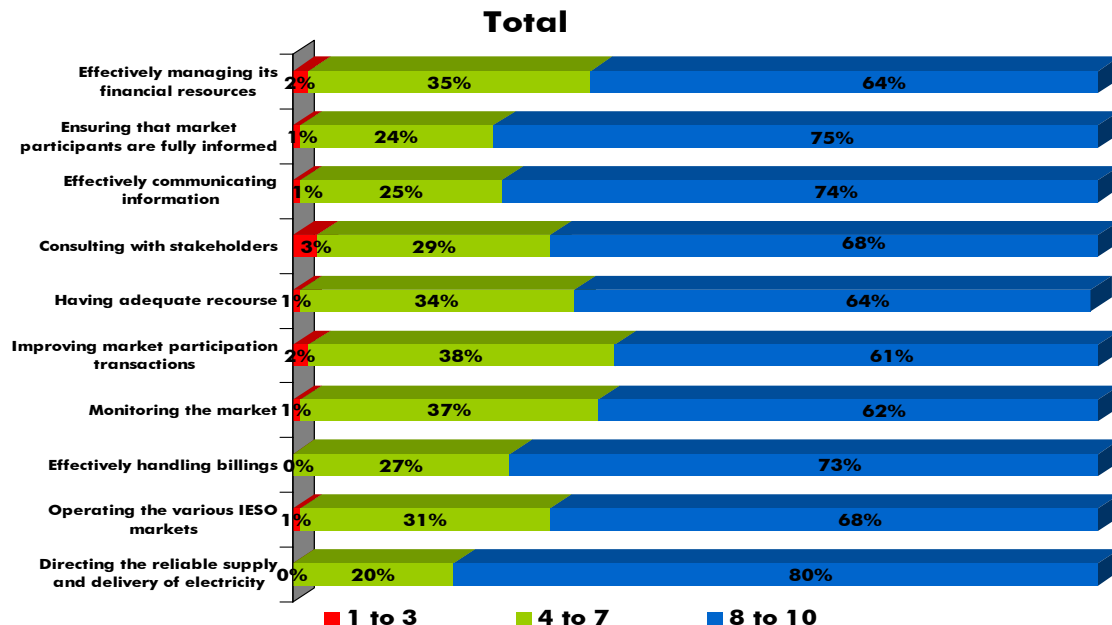


When we turn our attention to the senior leadership of the IESO, we find similarly strong rankings. We do notice, however, that the overall level of confidence in this group does slip a little. While still a very good ranking of over 60% indicating a confidence level of 8 or higher, we do notice that the lack of knowledge of the individuals in senior management roles does affect the rankings. In the qualitative section of the survey, we were able to probe a little deeper into this feeling and our findings are listed later in the document.

Senior Leadership



The survey then asked participants to rank on a scale of 1 to 10 the performance of some of the current services provided by the IESO. For the purposes of the work, 1 represented a ranking of poor performance and 10 was excellent. As you can see from the chart, the IESO continues to have much to be proud of. The IESO still continues to rank very highly for a monopoly organization in all of the areas of its core mandates.



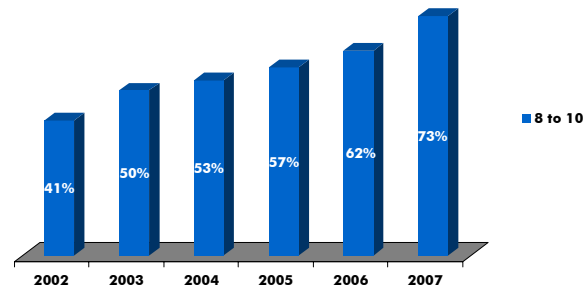
The success of the IESO this year becomes even more apparent when we look to the historical comparisons of the numbers. As in previous years, we have plotted the number of respondents who indicated a ranking of 8, 9, or 10 in the survey. In virtually every category, the IESO has improved on last year's already impressive numbers.

	2006	2007	change
Improving transactions	32%	61%	+ 29%
Effectively managing its financial resources	34%	64%	+ 30%
Consulting with stakeholders	47%	68%	+ 21%
Monitoring the market	49%	62%	+ 13%
Having adequate recourse	49%	64%	+ 15%
Ensuring that market participants are fully informed	52%	75%	+ 23%
Effectively communicating information	62%	74%	+ 12%
Effectively handling billings	62%	73%	+ 11%
Operating the various IESO markets	66%	68%	+ 2%
Directing the reliable supply and delivery of electricity	81%	80%	- 1%

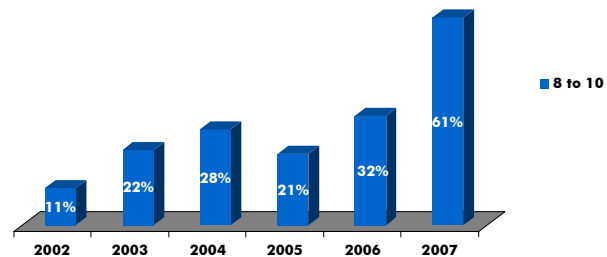
It is important at this point to reiterate that the methodology for the quantitative work did change this year. One of the by-products of that change was more participants in the survey than in previous years. The net result was that we did not control the number of participants from each of the categories of customers which could have lead to an upward

change in the numbers seeing as distributors made up more of a percentage of respondents than in previous years.

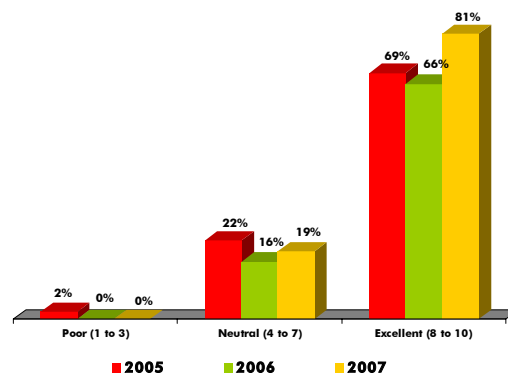
The IESO made significant gains over last year's rankings in a few areas of note. Specifically, the IESO saw an 11% increase in its ranking on effectively handling billings, settlements, and fund administration. This increase continues a steady increase in the ranking over the past six bodies of work. In 2002, only 42% of customers gave the IESO a rank of 8 or above. That number rose steadily each year to this year's high water mark of 73%. The IESO has much to be proud of in this steady increase of the past number of years.



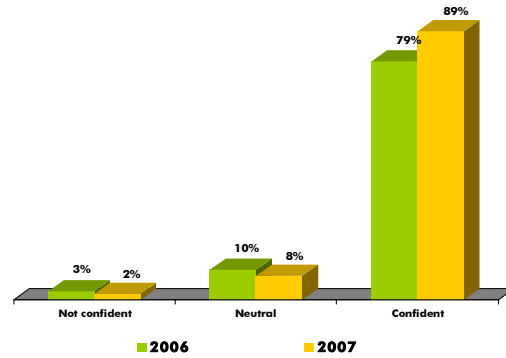
Also of note for the IESO was the significant increase in the ranking pertaining to the improvement of market participant transactions. The percentage of customers who gave the IESO a rank of 8 or higher in 2007 almost doubled over the 2006 results. A full 61% felt that the IESO had done a very good job in the work. While not directly comparable, we found many comments around the settlements website and the new digital certificates in the qualitative section which could be reasons for this dramatic increase.



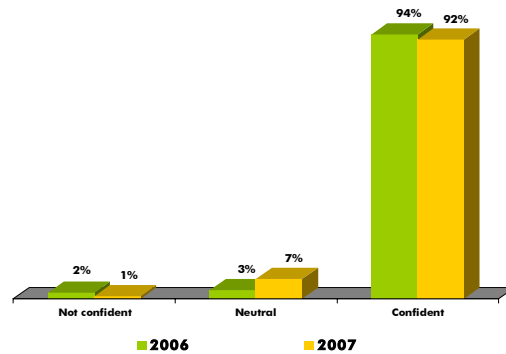
Following the rankings of the services of the IESO and its core mandates, we turned our attention to the account managers specifically. Perhaps one area of concern for the IESO was our finding that the over all amount of contact that customers have with their account managers seems to have dropped slightly over the past year. Given that we found that IESO customers generally like and trust the account managers, it would seem that an increase in their contact would only increase the customer's overall opinion of the IESO. In fact, we found that when we asked IESO customers to rank their relationship with their account managers, we saw an increase of 15% over last year's work in those who ranked them an 8 or higher.



Another area of significant improvement for the IESO last year was in the area of market administration. We asked customers to rank their confidence level in the IESO handling of the market and we found that almost 90% of those surveyed expressed confidence in the work being done. This is an increase over the 79% ranking the IESO received last year.



We asked a similar question of confidence surrounding the IESO's critical role of handling of reliability. We saw a 2% decrease in the percentage of customers who expressed confidence this year. While this chart does not reflect the underlying feelings of these customers on the issue of reliability, we offer further explanations for this decrease in the qualitative section of the report.



QUALITATIVE RESULTS

GENERAL ELECTRICITY SECTOR

Impressions on the Ontario electricity system

We saw a marked difference this year in the responses to this question. This year we saw a much higher degree of optimism surrounding the electricity sector than we have previously. Participants indicated that the lack of significant legislative or regulatory change in the sector over the past 12-18 months has meant that customers can focus on making the existing rules work better for them. When we questioned participants on specific examples to illustrate their opinion, few were forthcoming. Rather, participants had a general feeling of calm towards the sector.

This general feeling of support towards the electricity sector should not be misconstrued as support for the existing market, regulatory, or legislative structures. Many still expressed frustration towards lack of progress on their issues of interest (LSEs, Conservation, Regulatory Burdens, Prices, etc). IESO customers did, however, feel that the sector needed a period of calm. There is a feeling that the sector is better off now than it has been for years.

When we asked customers to turn their attention to the electricity market in Ontario, most indicated that Ontario had moved in a somewhat different direction than originally envisioned. The vast majority of those surveyed indicated that the government, by accident or on purpose, has moved away from a commodity based market and is moving the province towards a contract market. With the exception of electricity traders and marketers, this revelation was not met with any significant opposition. It was felt that a contract market would at least ensure that power plants were built, which was superior to what was happening under the previous open market. Electricity marketers and traders felt that the administrative and regulatory burdens in Ontario were too much to deal with for the return on investment. When we probed further on this they simply indicated that it is easier to work in other jurisdictions where there was a bigger market and a greater number of consumers.

Leadership in the sector

The IESO continues to occupy a critical leadership role in the sector. Most of the customers we spoke with indicated that they turn to the IESO when looking for sound technical advice on Ontario's electricity sector. The IESO was the most frequently mentioned agency by customers when asked who they turn to for advice and direction.

While these rankings are impressive for the IESO, we continue to find that many respondents indicated that there is no real leader in the sector. Many felt that the protectionism of each of the too many agencies in the sector was one of the significant problems with Ontario's electricity system. Many felt that the government should

eliminate one or more of the agencies from the mix to alleviate some of the administrative burden.

IESO leadership and working within the sector

When we asked participants about the leadership of the IESO, we heard that most customers respect the senior management, Board, and executive staff. Many, however, indicated that they really did not know too much about these groups other than the name of the CEO. To most, the IESO at the leadership level remains largely unknown. Their opinion of the leadership seems to be an extrapolation of their interaction with the front line staff they are in contact with. Given that they give the staff high level marks for customer service and knowledge of the industry, they assume that the senior staff must be doing a good job as well. Some called for more information on the higher level operations and staff to get a better idea of where the IESO would be heading over the longer term.

The overall results indicate that the IESO is seen by its customers in a very favorable light. Given that assessment by the customers we spoke with, it comes as no surprise that the interviewees felt that the IESO worked well with its counterparts, to the extent that people had an opinion at all on the matter. In stark contrast to last year's work, we heard that many IESO customers did not have an opinion on how well the IESO worked with its counterparts like the OPA and OEB. Last year we heard about the overlapping mandates of the IESO and the OPA. In the past year it appears that many of the IESO's customers had their opinions of the OPA change, or have had some clarification surrounding the roles of the two organizations.

IESO challenges

As part of the interview process, we probed participants for their thoughts on the issues that face the IESO. In the opinion of IESO customers the biggest challenge for the IESO is defining an on-going role for the operator. We heard many accounts of things that were unclear for the IESO over the long run, most importantly was the questioning of the IESO's role in reliability beyond the current day or week. Those we spoke with were troubled by the realization that the IESO had no real mandate beyond keeping the grid working in the short-term. While many still looked to the 18 month outlook as a good indicator of the system's health, it was largely questioned if the IESO really had that much control over the long term reliability of the grid given the contracting power and IPSP residing within the OPA.

Many also indicated that the agency review process spearheaded by the Ontario government could also prove to be damaging to the IESO if they did not take a clear stance and stake out IESO territory in the sector. This is of particular concern for the IESO when we heard open commentary from IESO customers that it would be unfortunate if the IESO were split between Hydro One and the OPA, but that they saw

the potential for such a development. It should be noted that the interviews were completed prior to the release of the Agency Review Panel's report in December.

Similar to last year, we continue to hear of concern for the IESO surrounding the MDMR. Many felt that the IESO reputation as a competent, technology savvy organization could be jeopardized by the process. Many still feel that the IESO may not have been the best choice for the smart meter work. Regardless of their feelings on the appropriateness of the repository being housed within the IESO, they are direct in their comments that responsibility for a smooth delivery now rests solely with the IESO. Even though many feel that it is outside of the mandate of the IESO, and outside of its traditional areas of expertise, they are willing to work with the IESO on this critical project. They are also quick to indicate, however, that while they will help and participate in the process, ultimate success or failure on the project rests with the IESO.

IESO PRODUCTS AND SERVICES

What Customers Value

Above all else, IESO customers value reliability of the electricity supply and the technical expertise of the operator. We heard near constant praise for the sound judgment and excellent advice which IESO customers receive from their contacts at the IESO. They frequently mentioned the importance of quick response times for their business and appreciated the timely, accurate communications.

Specifically, we heard praise of account managers, communications staff, and control room staff. In contrast to our work last year, we heard about the positive changes in workshops and a more meaningful stakeholder process.

As a result of recent efforts, we did hear some indication that the customers we spoke with appreciated what they have read / seen / heard about the IESO's advocacy efforts with the government on behalf of the sector. Many felt that the IESO was ideally suited to provide commentary on the sector as a whole, without focusing on the interests of one particular segment of the market. Many felt that advocacy work should continue, even though it was likely out of scope from what the original mandate of the IESO was.

Additionally, we heard that customers of the IESO, specifically LDCs and large volume consumers, valued the work done by the IESO in the areas of customer education. The IESO's work was seen as tailored, where possible, and also rooted in the technical expertise that is the foundation of the IESO. Where programs were not off the shelf in nature, the fact that the IESO understood more about the system than anyone allowed information to flow and programs to be adapted.

Weekly Bulletin

The new format for the weekly e-mails has been a major success story for the customers we spoke with. There were virtually no complaints on the new process. Customers

found the piece to be informative, comprehensive, and easy to scan. We did hear, however, that very few of the customers read the product from cover to cover each week, rather most simply scan the headlines. Perhaps more important than the Weekly Bulletin itself, was that customers appreciated the fact that the IESO listened to their comments from last year.

When we asked customers to discuss if there are some types of communications that should not be included in the update, we first encountered some confusion as to what we were referring to. When we prompted for the release of third party information notices, we found that nearly all of the IESO's customers we spoke with indicated that it was the reader's responsibility to review the bulletin, and that the onus should not be on the IESO to post items such as these in a separate communication. In most cases we heard that the information contained in the weekly update was strong enough for companies and organizations to make operating decisions. Where customers needed more information, they would call their contacts at the IESO to get quick clarifications.

Improvements to Products and Services

When the discussion turned to the products and services that the IESO offers, we found that most customers did not know what products and services the IESO offered. In the absence of prompting, IESO customers could not mention any on the list provided. Once we began to discuss the various items, we found near 100% recognition for each of the items, with the exception of the Ontario Market Outlook. We suspect, however, that it was because the Market Outlook was a new product that has not yet received a following.

While there was recognition of the products and services, that should not be construed as in-depth knowledge of them. Predictably, the type of customer we were speaking with would most likely only be interested in products and services that pertained more to their business.

In general, the changes that the IESO have made in the targeted areas were well received. Again, perhaps of more importance than the actual changes was the fact that customers appreciated that the IESO was responding to their concerns raised last year and in other forums. Of particular interest was the fact that the IESO has begun to address some concern around the provision of prudentials. In general, customers of all types were thankful for the efforts that the IESO has made so far in reducing the administrative burden placed on customers. Customers were generally thankful that movement has been made, but still felt that what was required of them was too great.

As indicated in other parts of this report, IESO customers continue to have concerns around the IESO acting as the Smart Meter Entity. Prompting customers here on the new regulation designating the IESO as the entity only served to get repetitive comments on the appropriateness of this work for the operator.

Other Products and Services

Again, we found that the majority of the customers we spoke with were at a loss to identify products and services offered by the IESO outside of their core mandates of operating the grid and administering payments. When we prompted for the items in the list, we did find that most respondents knew of the products, with the exception of the Ontario Market Outlook for reasons listed above.

Clearly, the 18 Month Outlook is the IESO's marquee document. It is most recognizable of all those listed to your customers and is widely read. Customers view it as being the central indicator of the health of the system in Ontario and it is considered a must read in the sector. The 18 Month timeline on reliability is, however, also a concern for many of the IESO's customers. They understand the purposes of the outlook, but given that it takes longer than 18 months to build, many feel that the report only serves to announce trouble after it is too late. Additionally, it is becoming more common place for customers to question the IESO's role in reliability with the OPA handling everything from 18 months to 20 years as indicated by the IPSP. These are the same customers who give the IESO a 90%+ ranking on maintaining the reliability of the grid.

As noted in other parts of this report, the opinion of the IESO's stakeholder engagement process has received a marked boost this year. Many felt that there were opportunities to get involved and affect changes if needed. While some were not necessarily pleased with outcomes (e.g. the ramp rate work), they nonetheless indicated support for the process itself. Some customers would still like to see more in this area, specifically the ability to participate without having to travel to Toronto.

Similar to the Weekly Bulletin, both the website and the newsletter received high marks from customers. Many indicated that recent changes to the website have made it more user friendly to customers and has further solidified its place as the first destination many go to in order to obtain critical information for the sector.

Again this year we asked about the customers' reaction to the further reduction in the fees that the IESO was charging. As we suspected, most had heard of the development again this year, and most felt that it was a move in the right direction. Unlike last year, however, we did hear some skepticism around the reduction in fees which fell into two distinct categories. The first group were those who wondered why the IESO was reducing fees again. Many felt that this was an indication of the IESO phasing out some type of service or product which, in the absence of knowing what that was, caused some concern. The second group were those who stated as fact that the only reason the IESO was reducing fees was because of the depreciation on their capital asset, most notable the IT surrounding the administration of the grid, purchased at market opening. Regardless of the group a customer fell into on this question, it was nearly unanimous that the IESO was not reducing fees because they had identified efficiencies.

RESEARCH | STRATEGY | RESULTS™



The word "NAVIGATOR" is written in large, white, sans-serif capital letters. Behind the text, there are abstract blue graphic elements: a thick, light blue arc that starts under the 'V' and ends under the 'O', and a thin, dark blue diagonal line that crosses the entire word from the bottom left to the top right.

NAVIGATOR

ESO.07 - Customer Survey 2007

**Charts (Proofed)
Version 3**

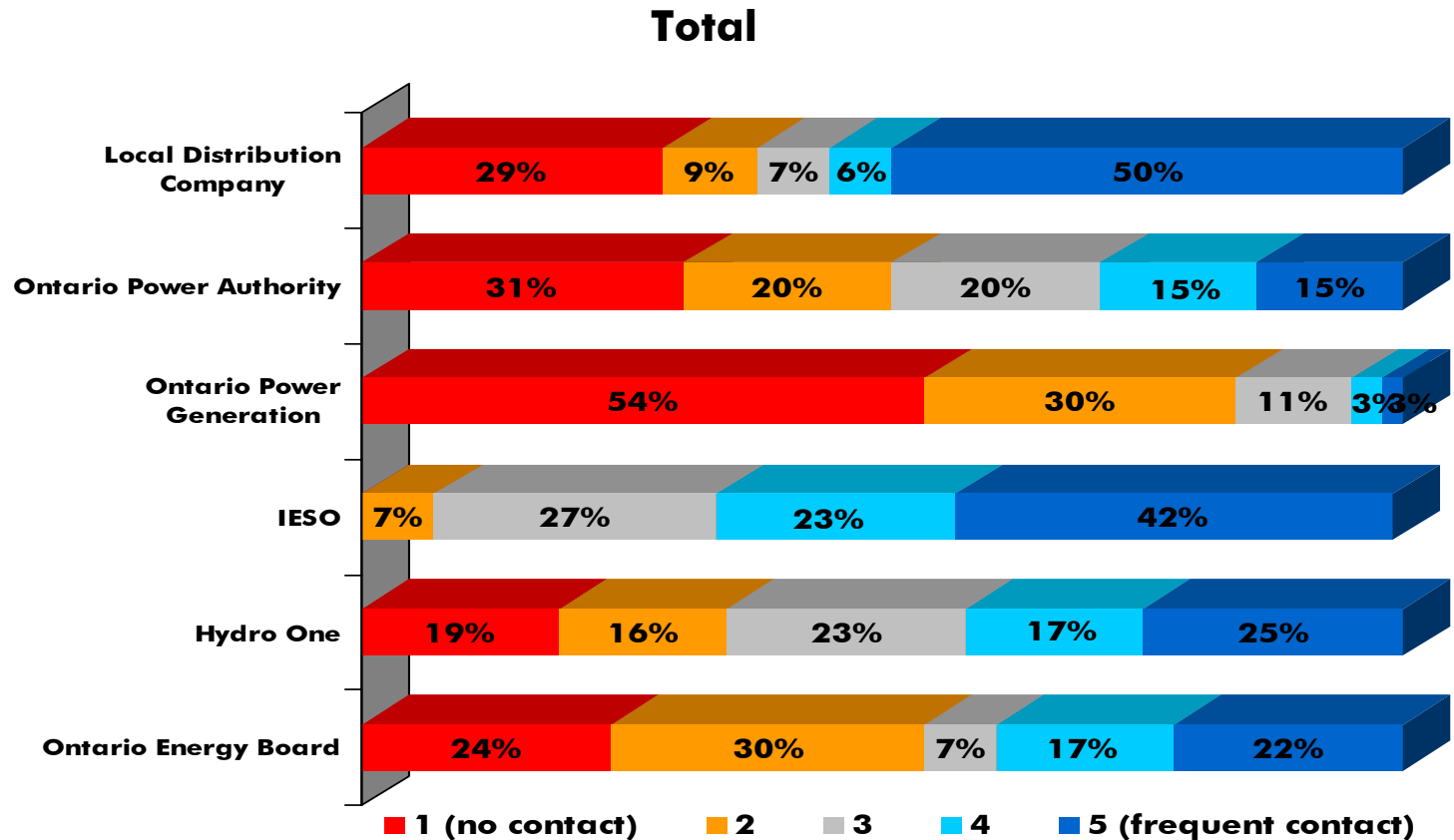
Interview Breakdown

The IESO has a variety of different types of customers. Are you a generator, transmitter, distributor, wholesale customer, retailer, or financial market participant?

Number of Interviews/Online			
Participant Class	2006	2007 Online	2007 Interviews
Generators	12	18	8
Transmitters	1	1	1
Distributors	26	36	14
Wholesale Consumers	15	11	10
Financial Market Participants	14	15	18
Total:	68	81	51

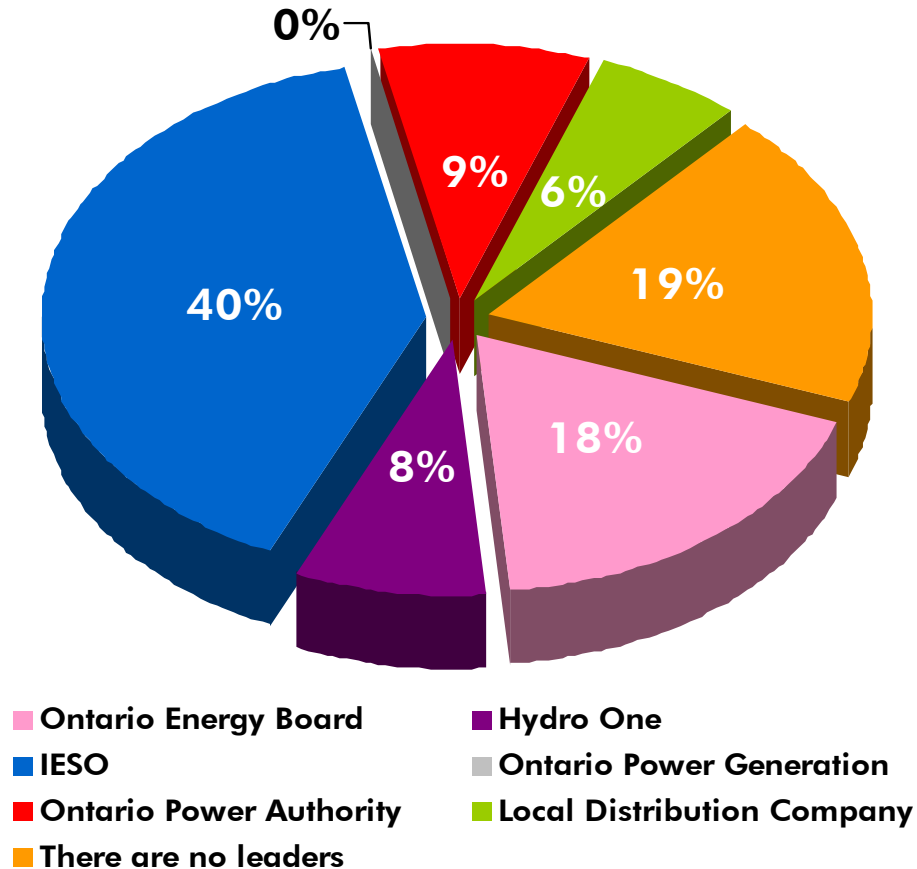
Level of interaction

In your interaction with Ontario electricity power system you may come in contact with a variety of different organizations. Please give an indication of your level of interaction with some of these different organizations. One a scale of 1 to 5, with 1 being no contact and 5 being frequent contact.



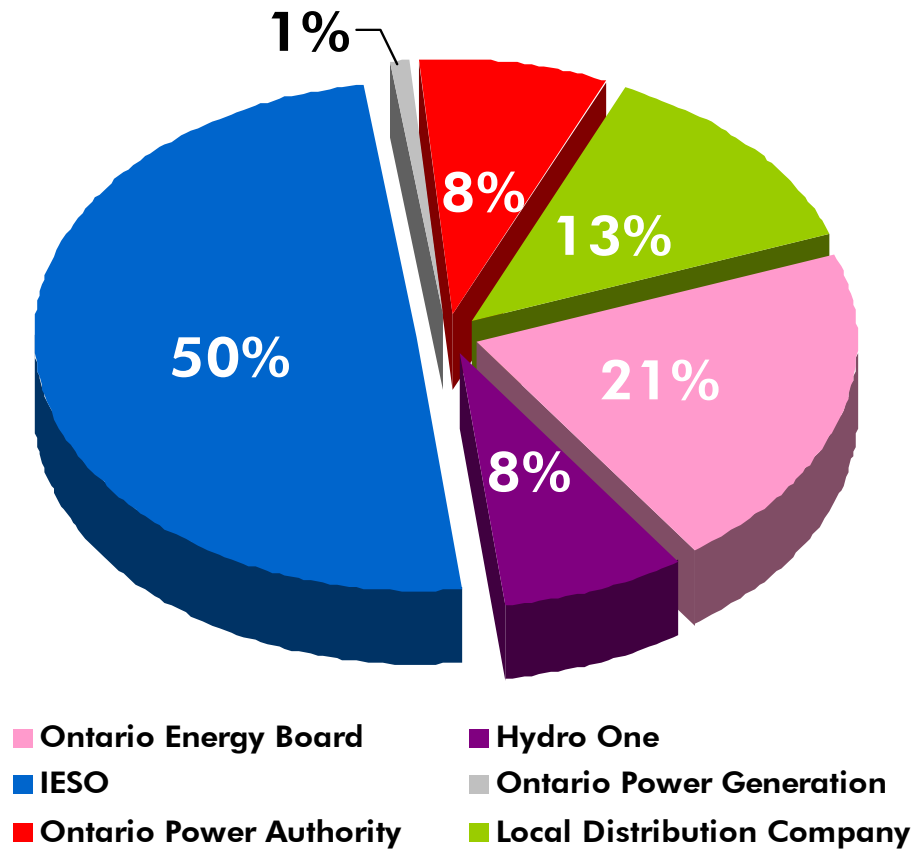
Leader in the electricity sector

Of these groups, which one do you look to as a leader in the electricity sector in Ontario?



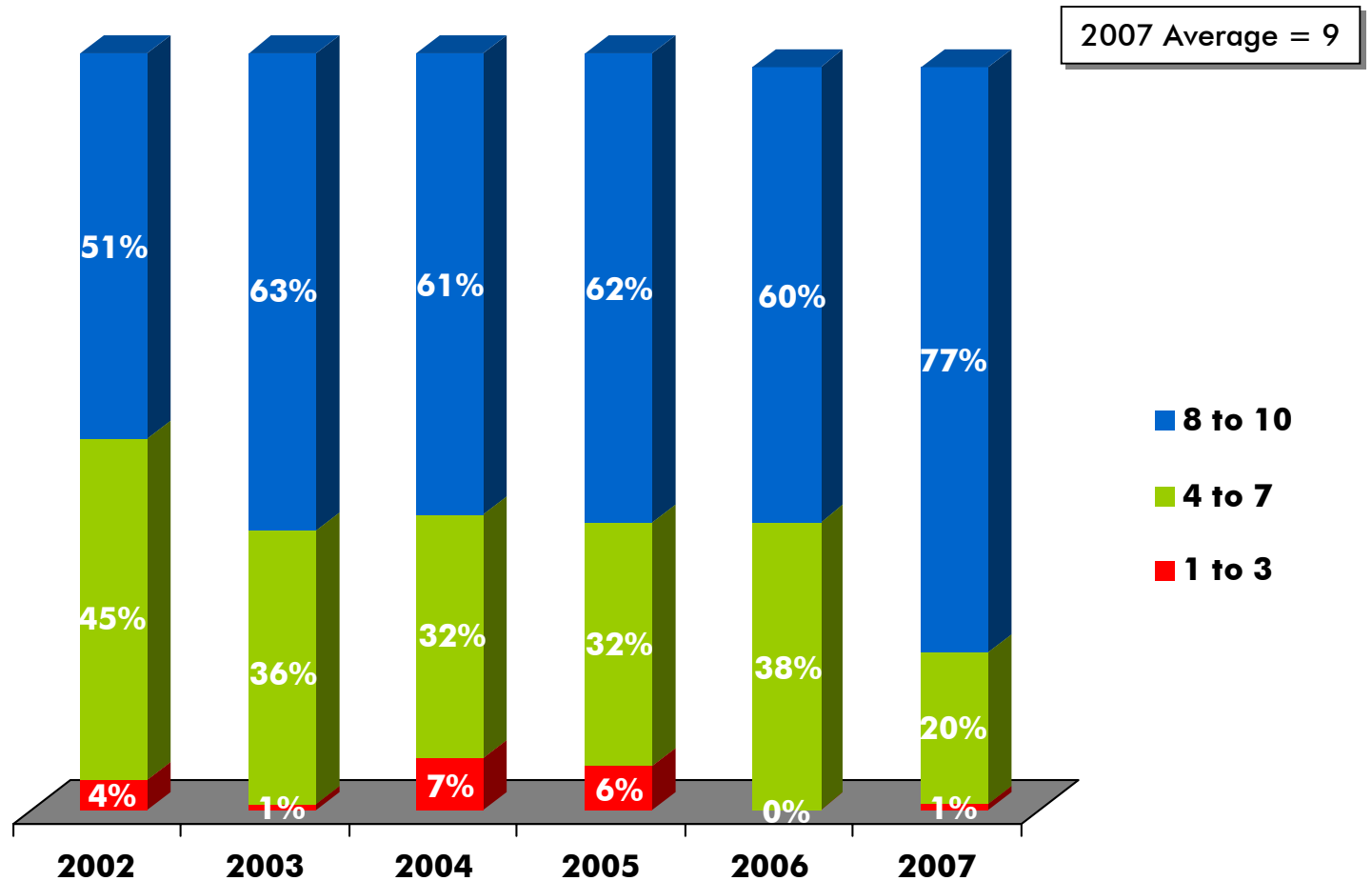
Credible organizations

Is there one particular organization that you look to for credible advice and information on electricity issues in Ontario?



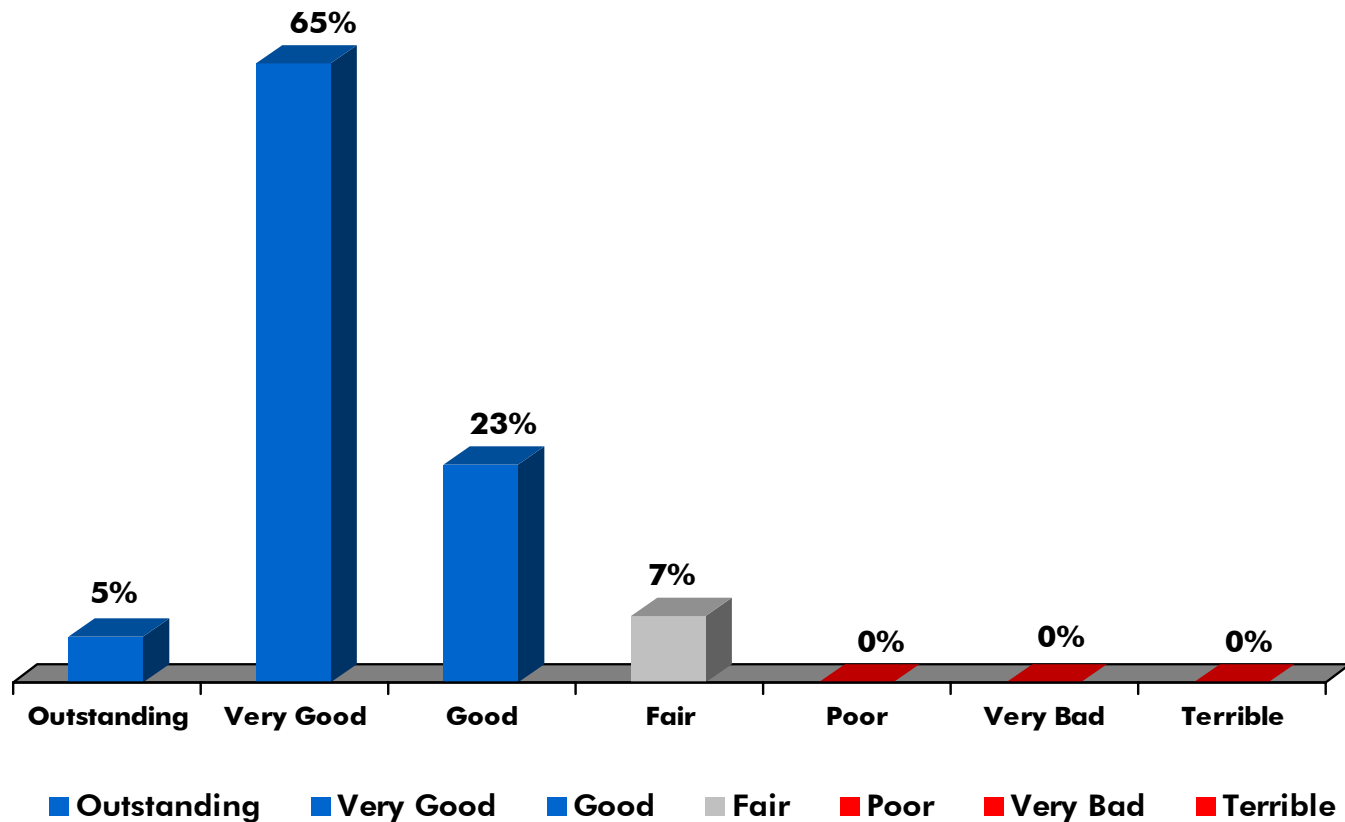
Overall relationship with IESO

On a scale of 1 – 10, with one being the lowest or very bad and 10 being the highest or very good, how would you rate your overall relationship with the IESO?



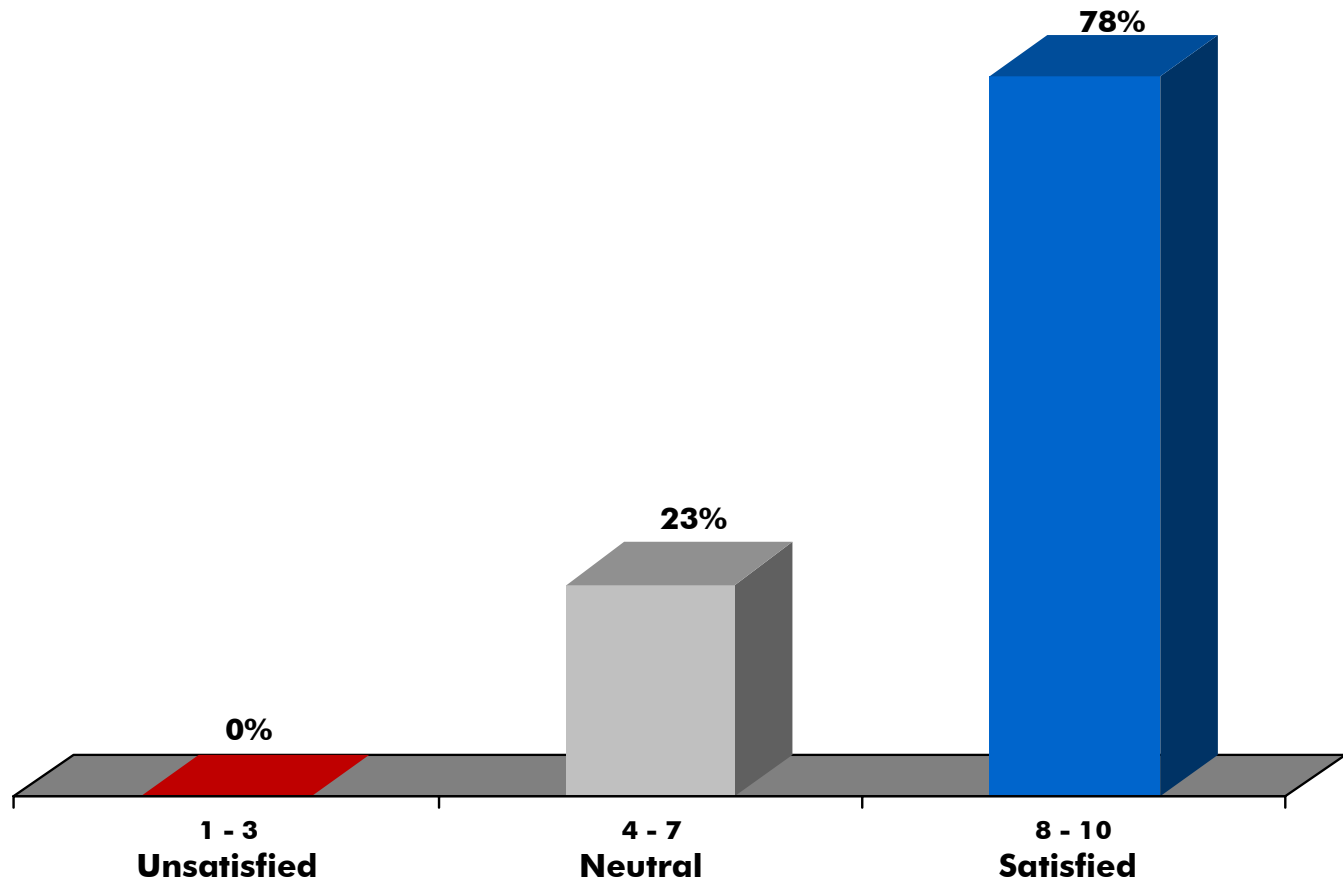
Experience with IESO in past year

Thinking about the IESO specifically, how would you rate your experience with them over the past year?



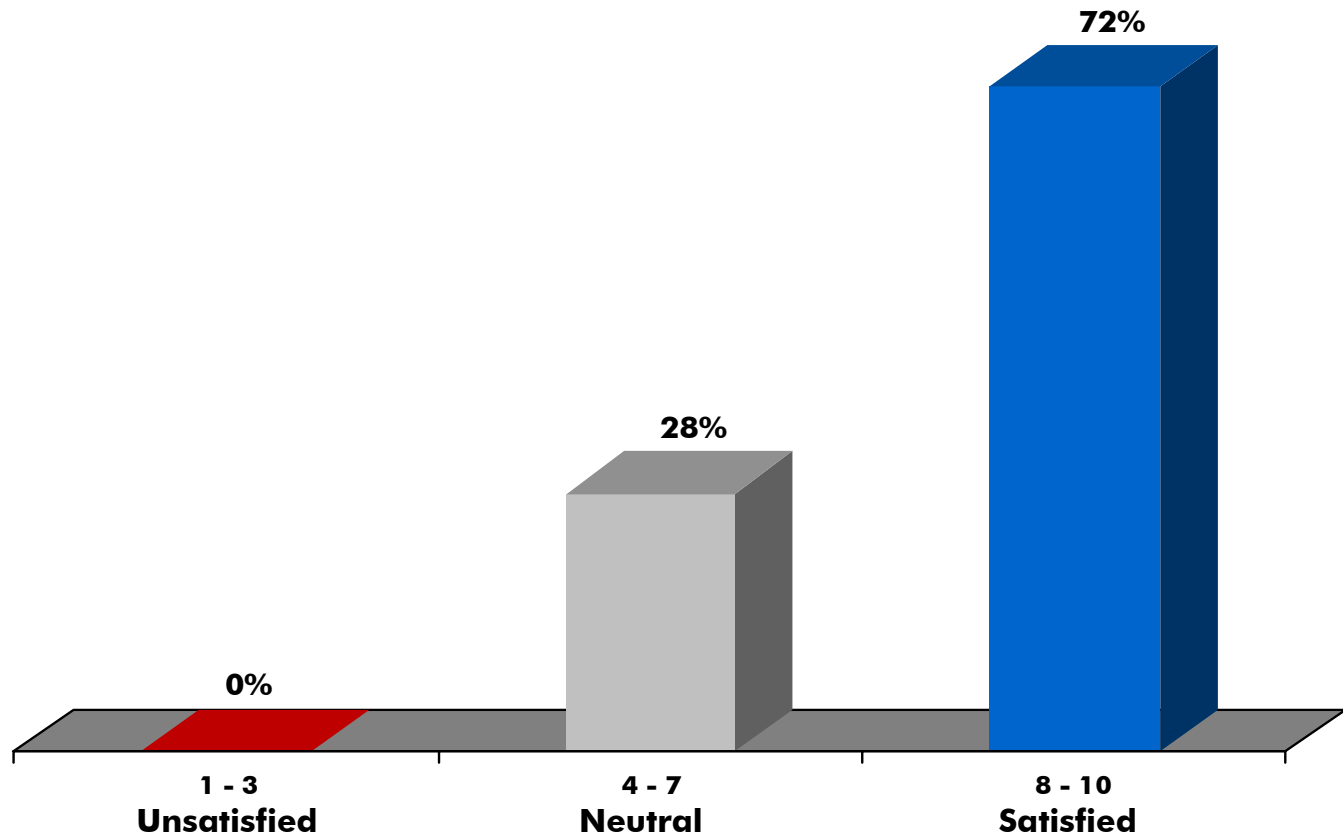
Satisfaction with IESO staff

Using a 10-point scale where 1 is unsatisfied and 10 is very satisfied, please indicate your level of satisfaction with the service you receive from the IESO staff you are in contact with.



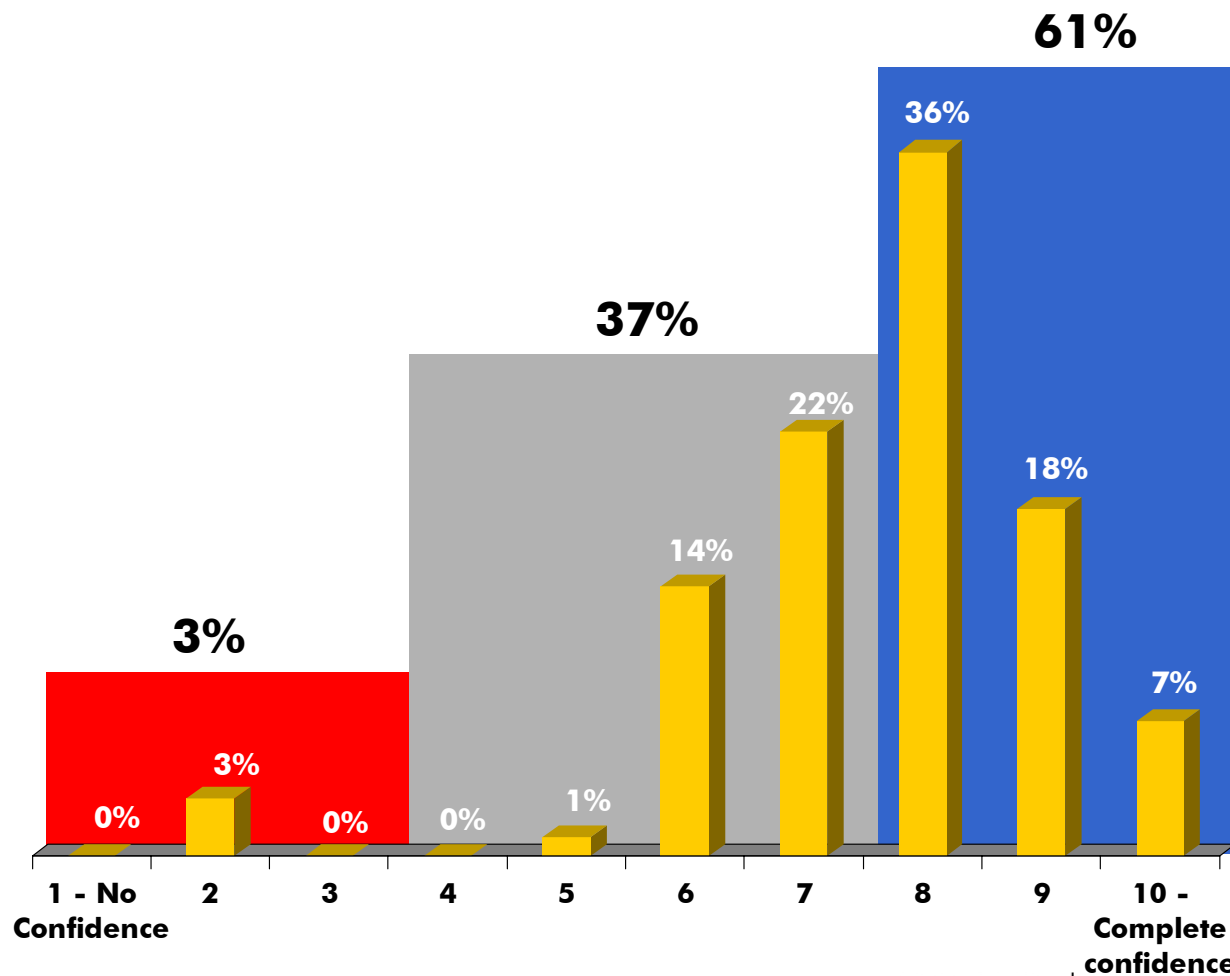
Satisfaction with service

Using a 10-point scale where 1 is untimely and 10 is very timely, please indicate how timely you feel the service you receive from the IESO is.



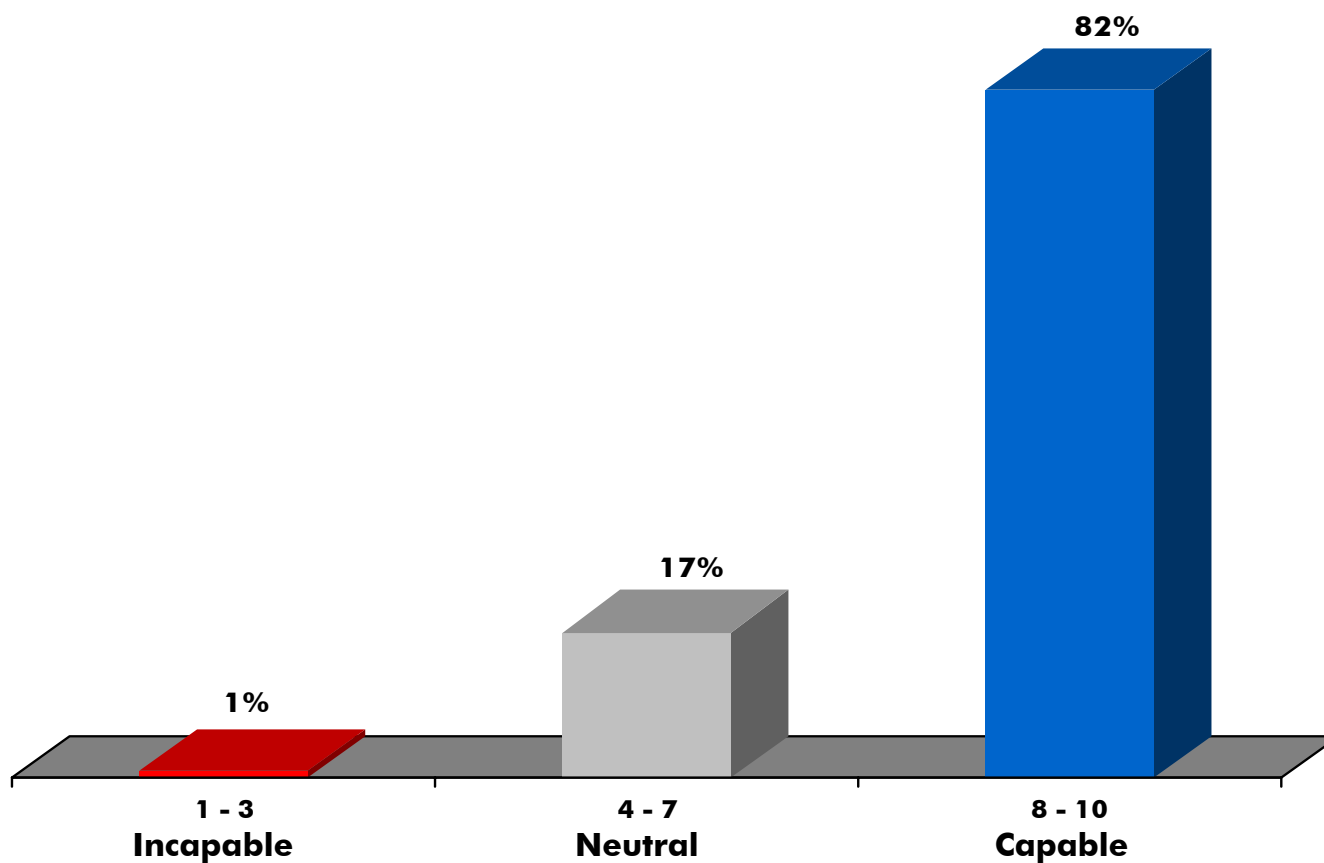
Confidence in senior management

Indicate your level of confidence in the IESO's Board of Directors and senior management to operate and oversee the market using a 10-point scale where 1 is no confidence and 10 is complete confidence.



Capability of IESO staff

Indicate the level of capability of the IESO staff you are in contact with using a 10-point scale where 1 is very incapable and 10 is very capable.

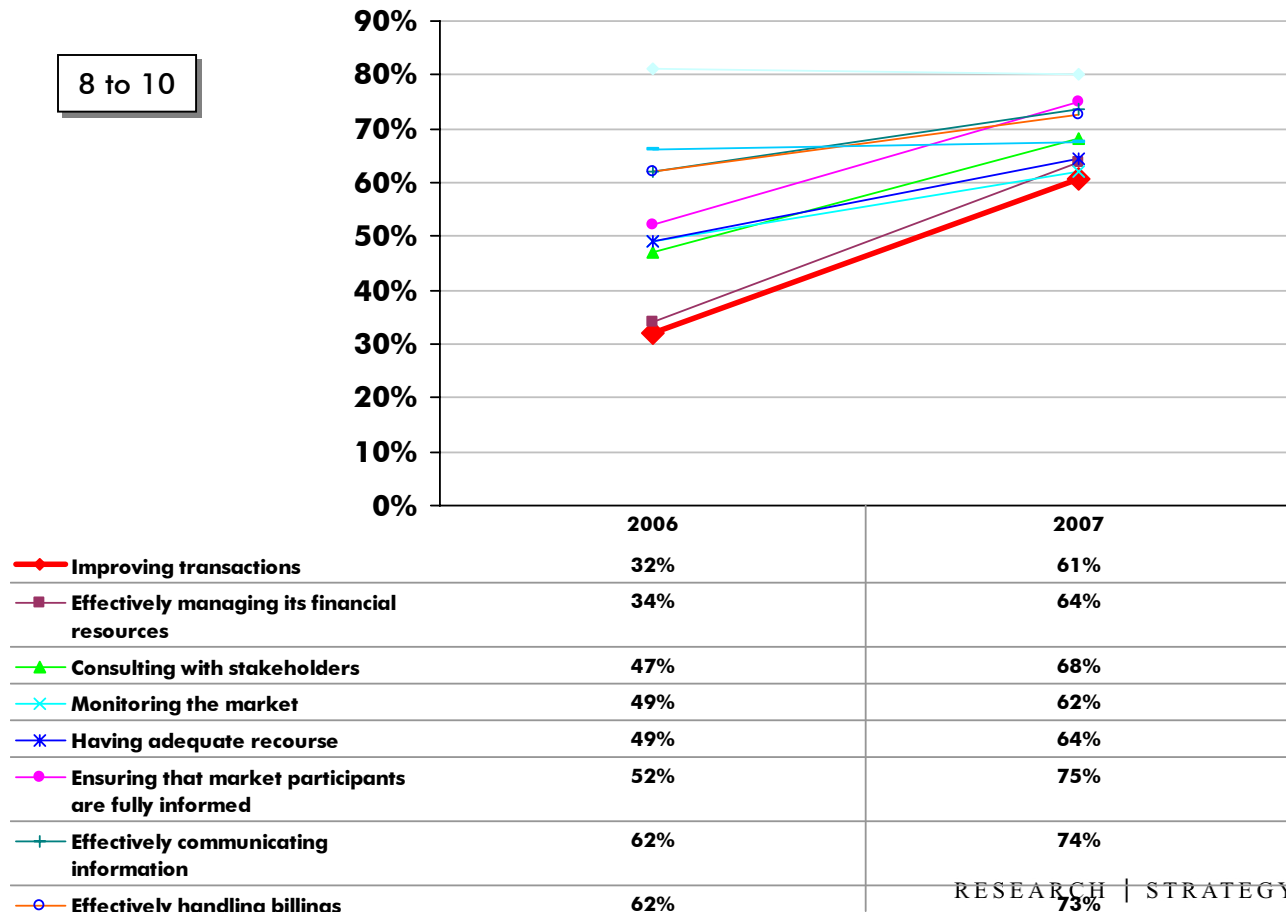


Historical Performance

Now that we have discussed the various groups within the IESO, I would now like you to rate the performance on some of the current services provided by the IESO. Again using a 10 point scale, this time 1 will be poor performance and 10 will be excellent performance.

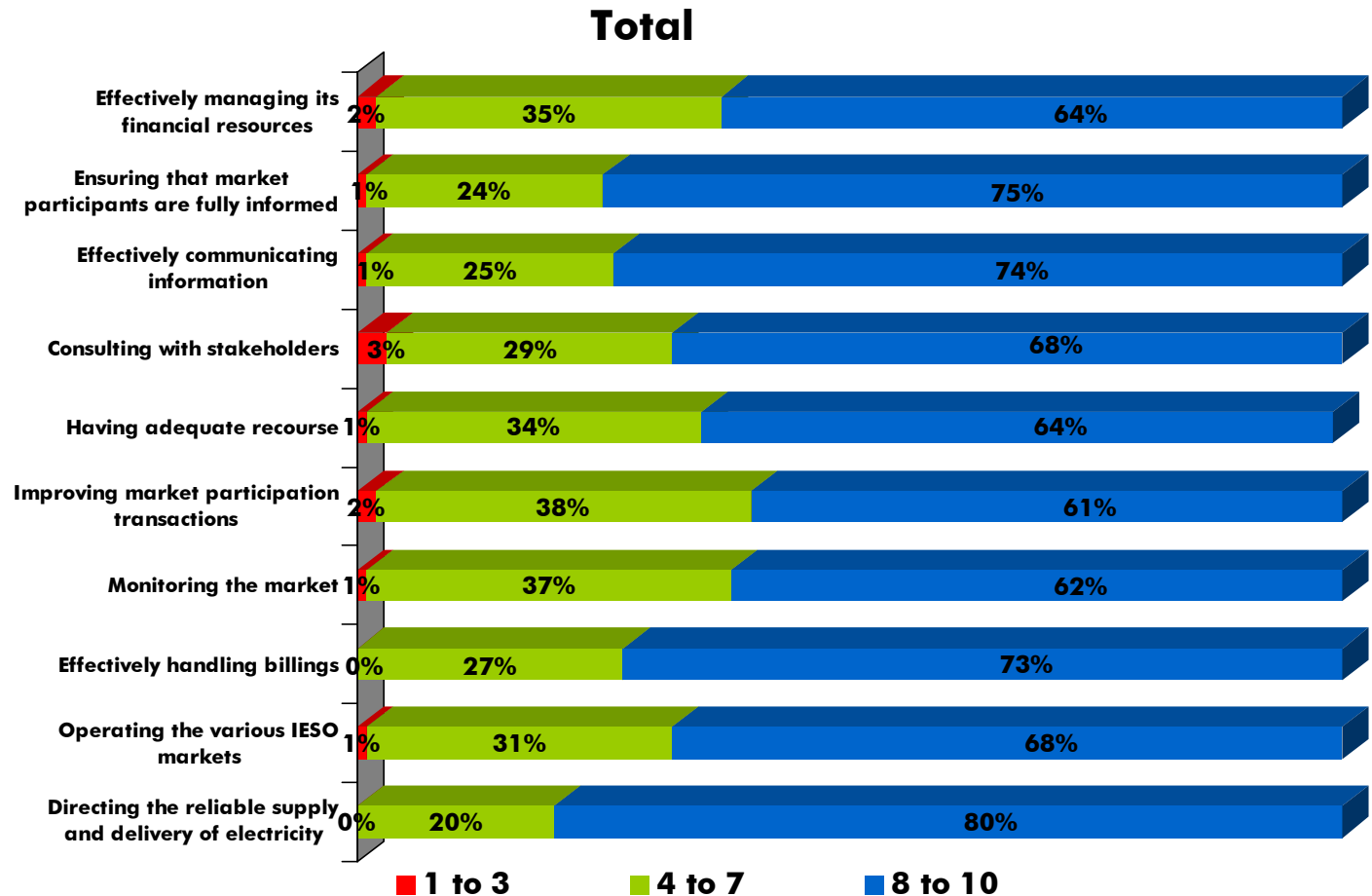
8 to 10

Historical performance



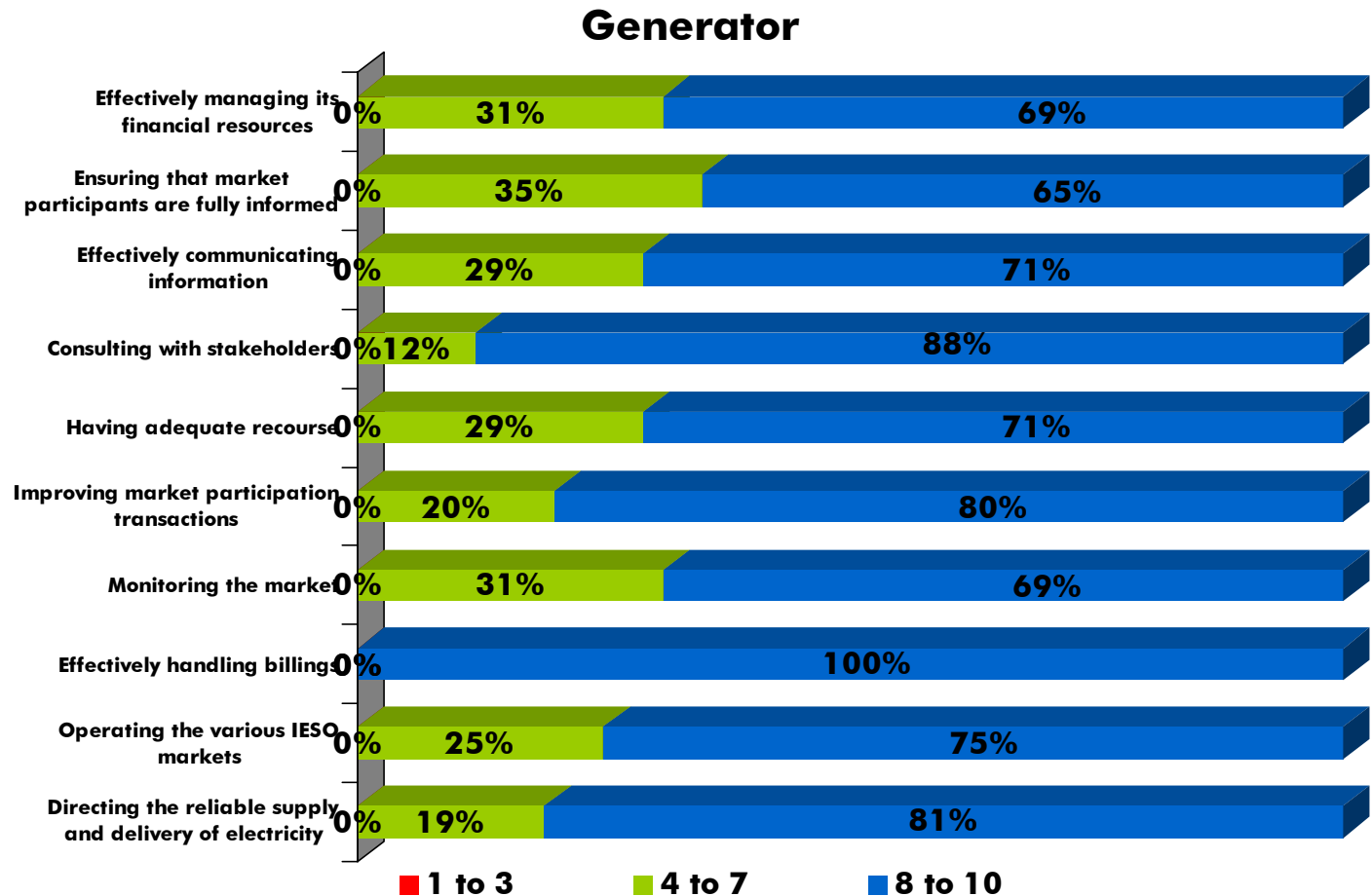
Performance of current services

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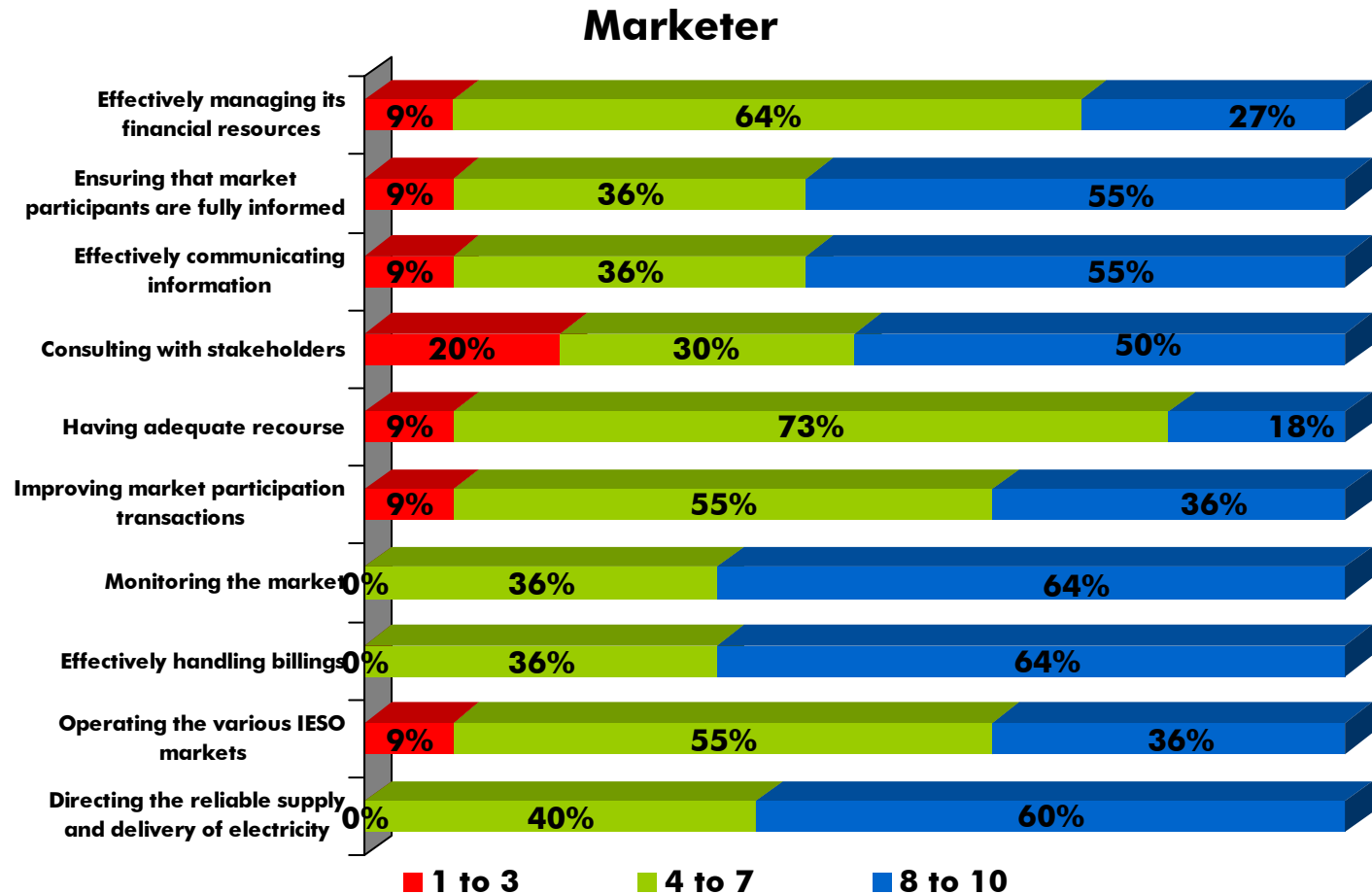
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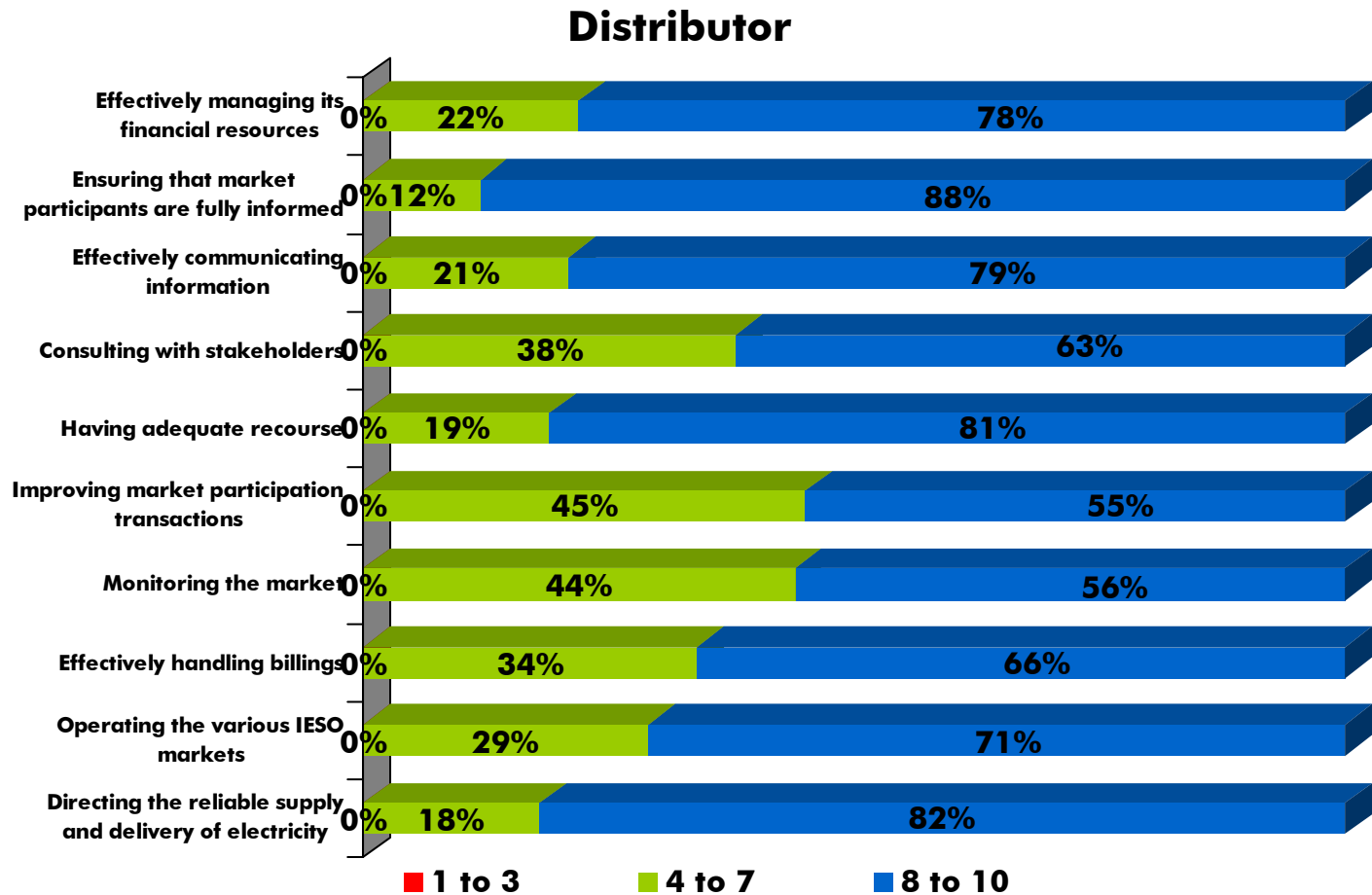
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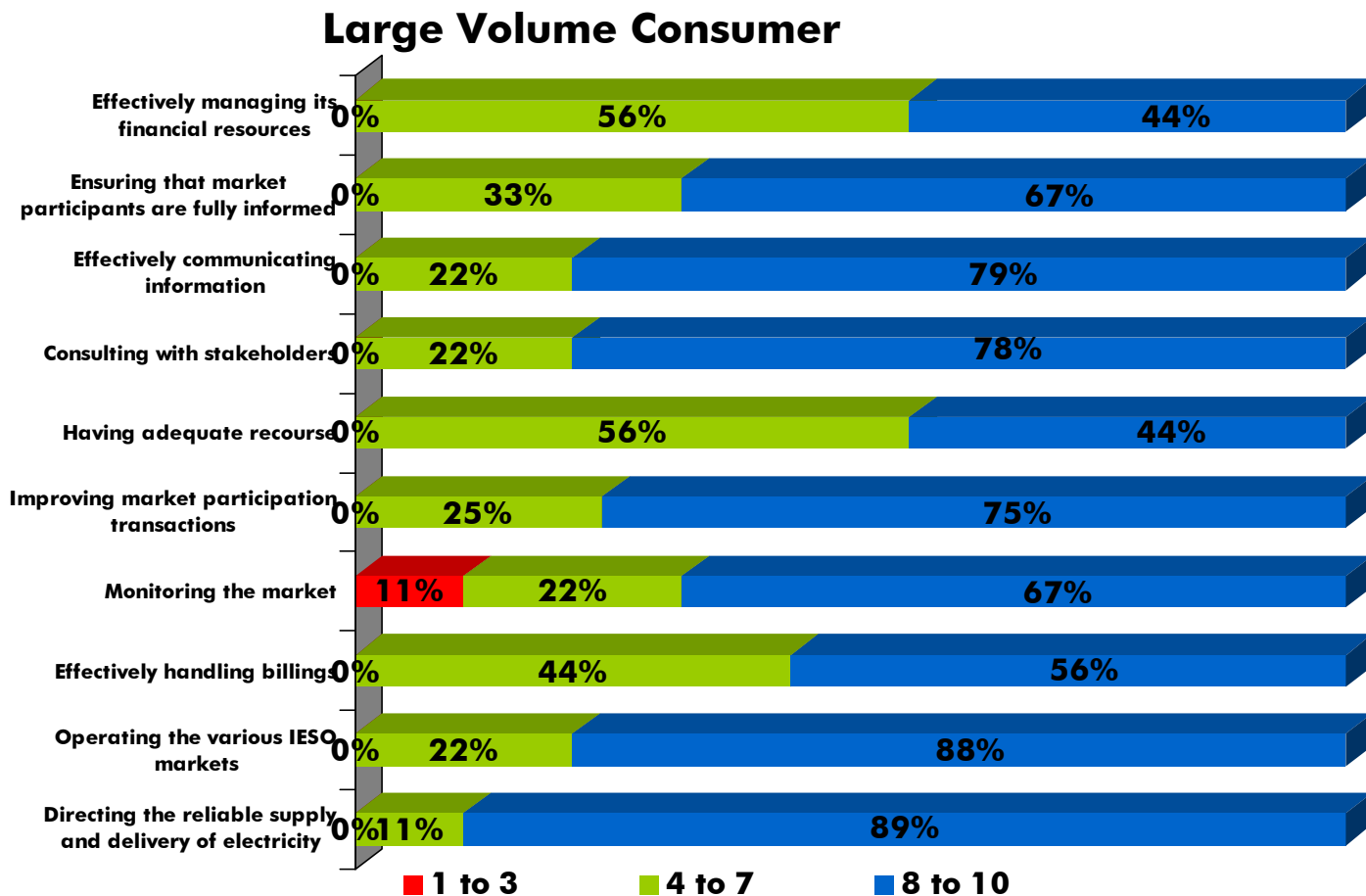
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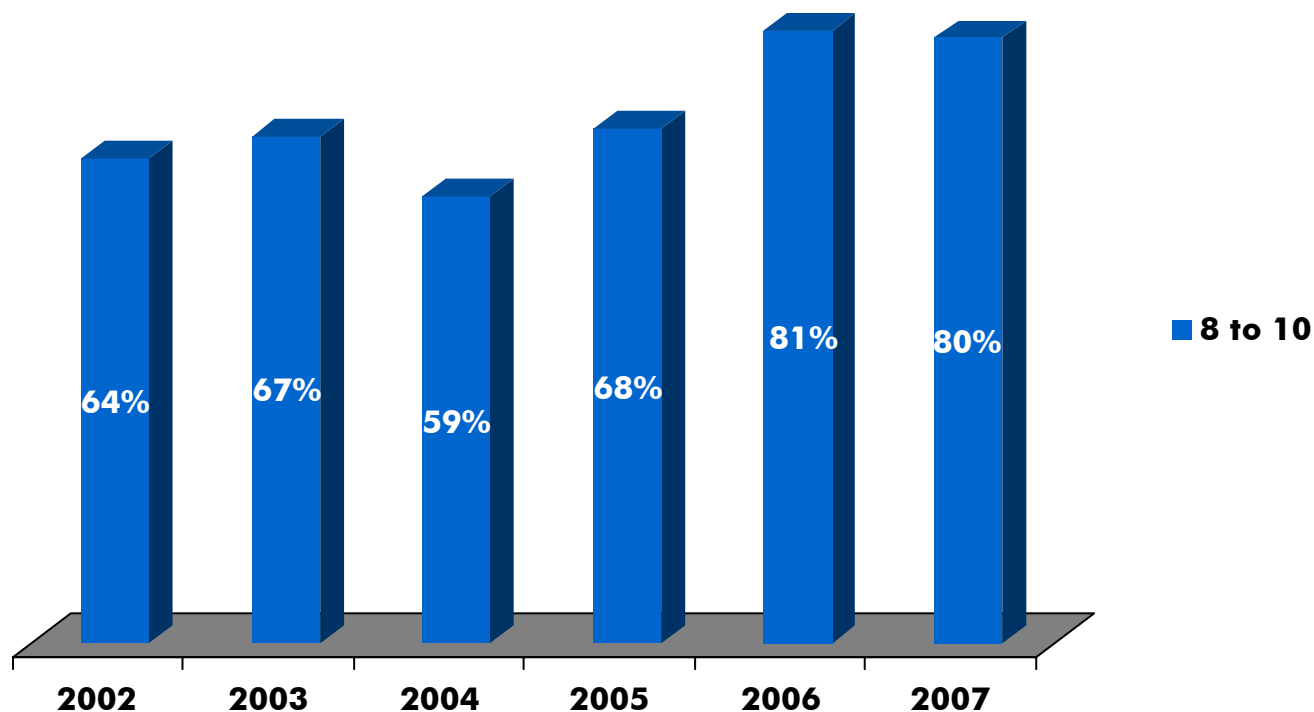
Performance of current services

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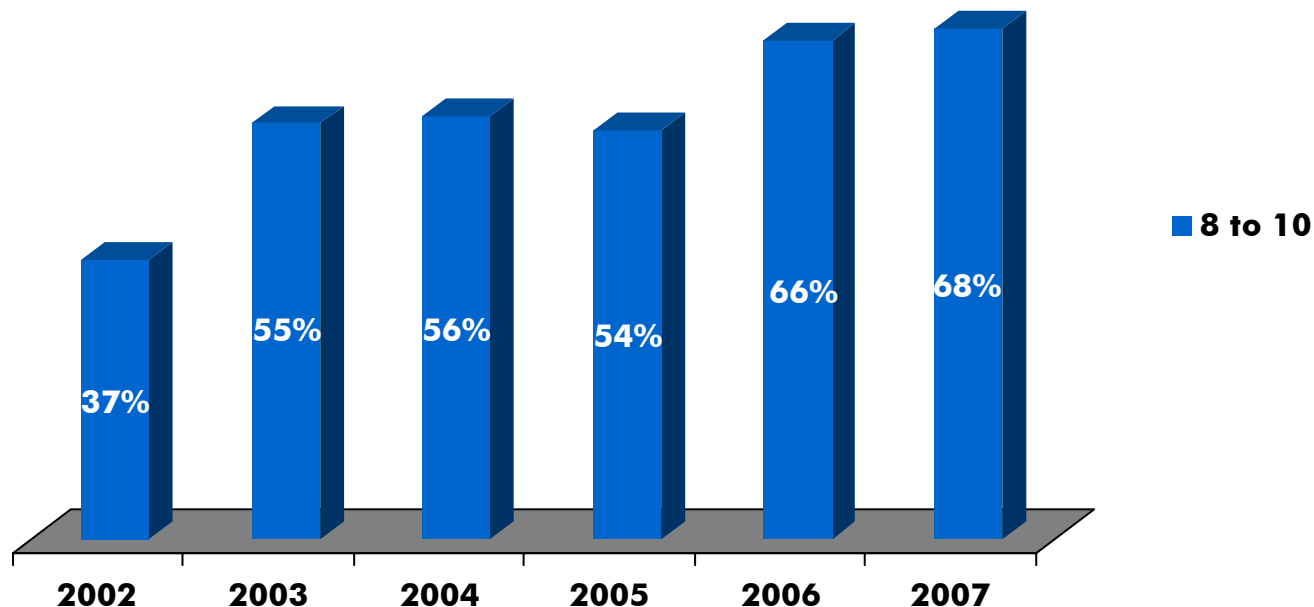
Performance of current services

Directing the reliable supply and delivery of electricity.



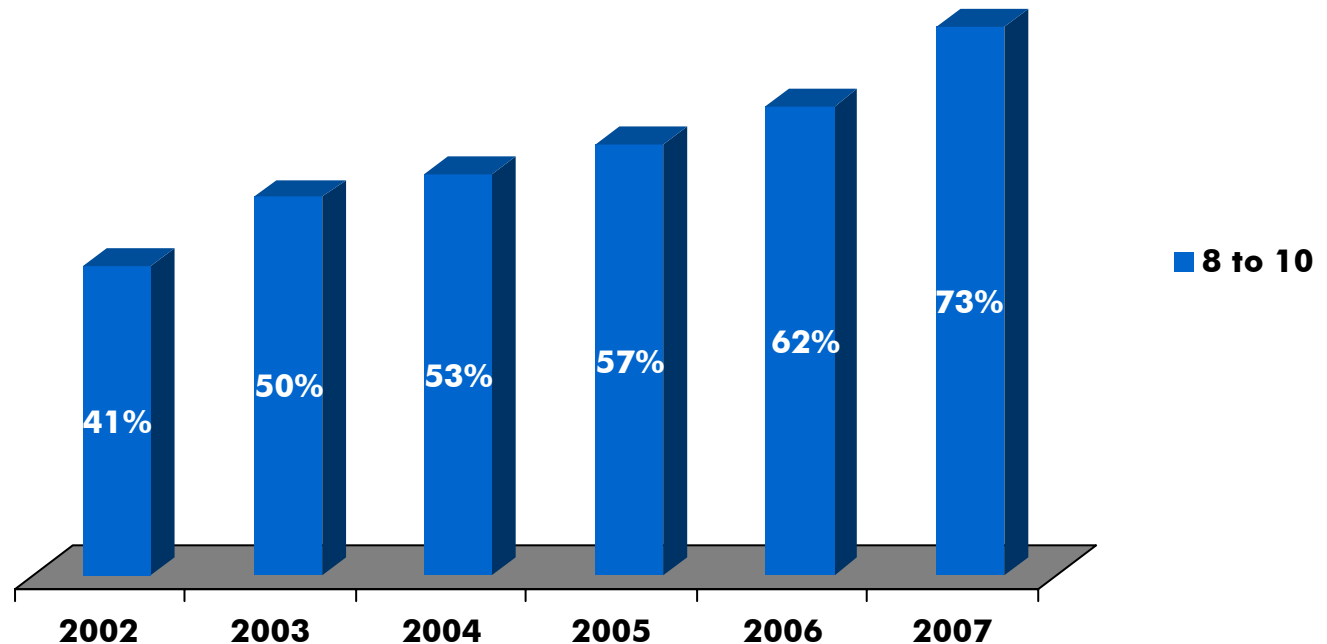
Performance of current services

Operating the various IESO markets including determining a market-clearing price and dispatching resources on the 5-minute interval.



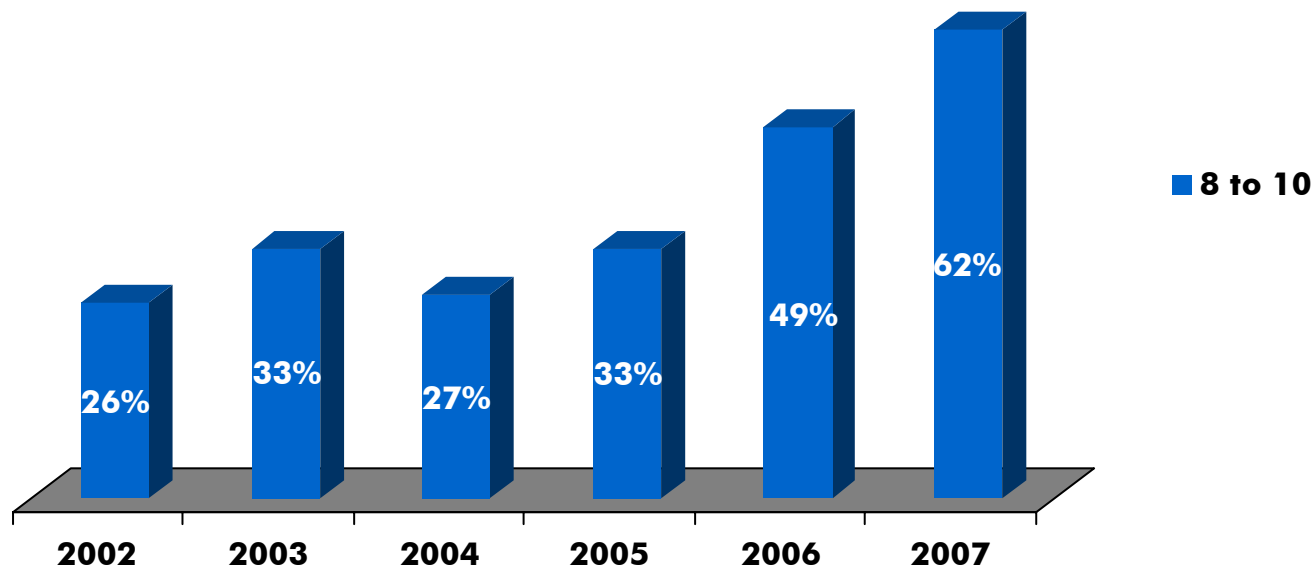
Performance of current services

Effectively handling billings, settlements, and fund administration with buyers and sellers.



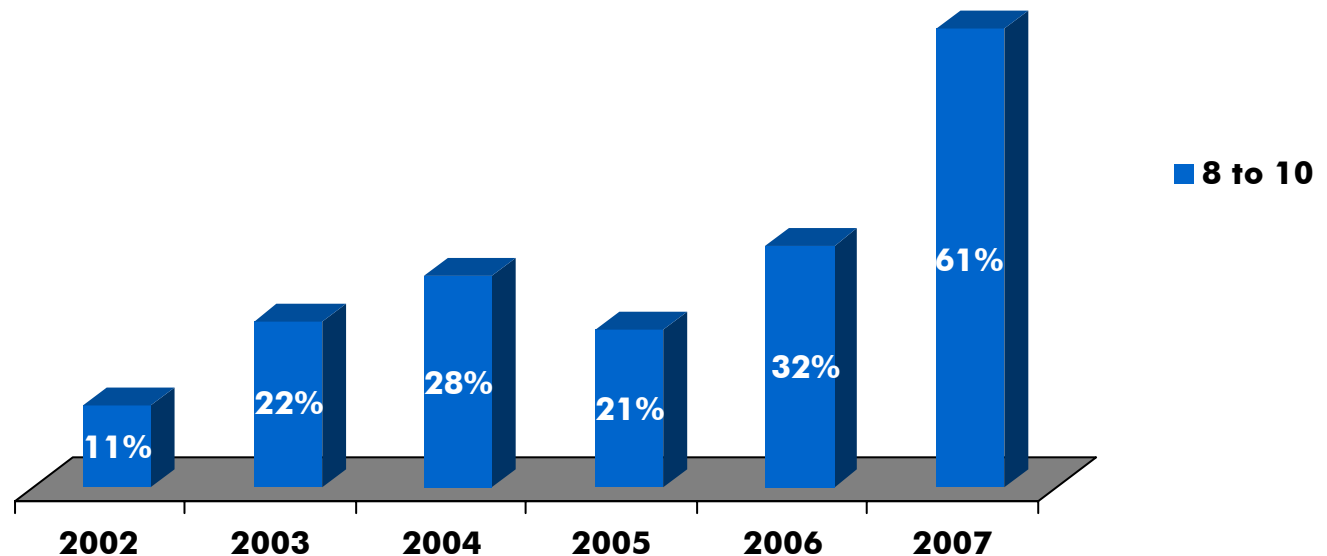
Performance of current services

Monitoring the market and carrying out enforcement of compliance with the market rules on a fair, consistent and timely basis with as much transparency as appropriate.



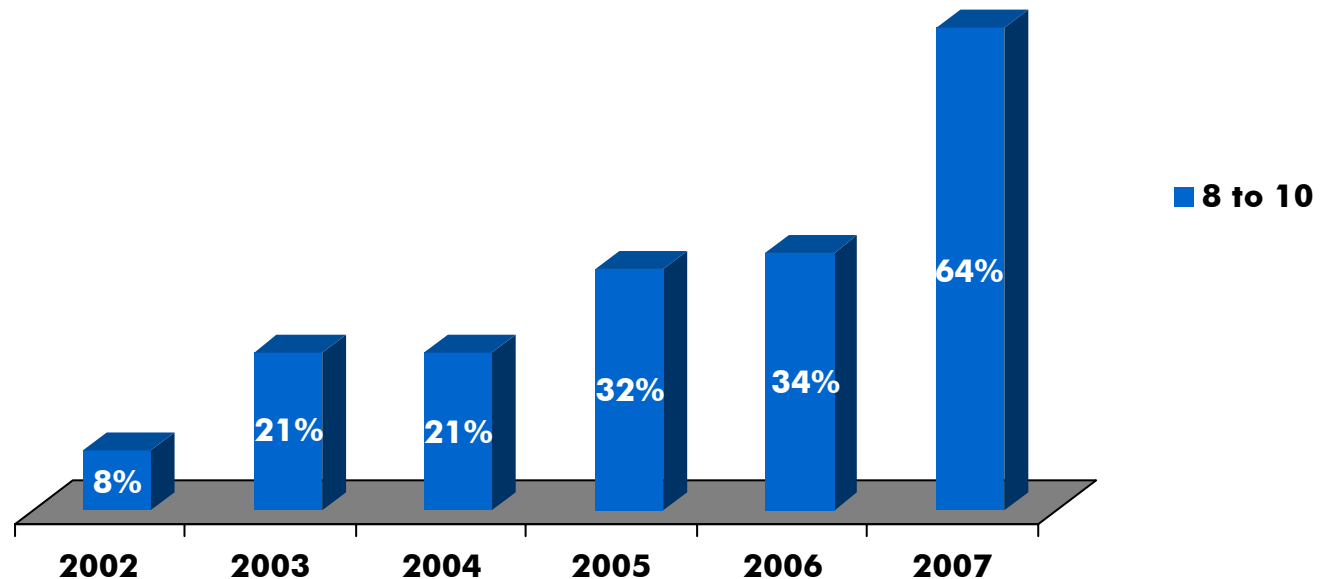
Performance of current services

Improving market participation transactions



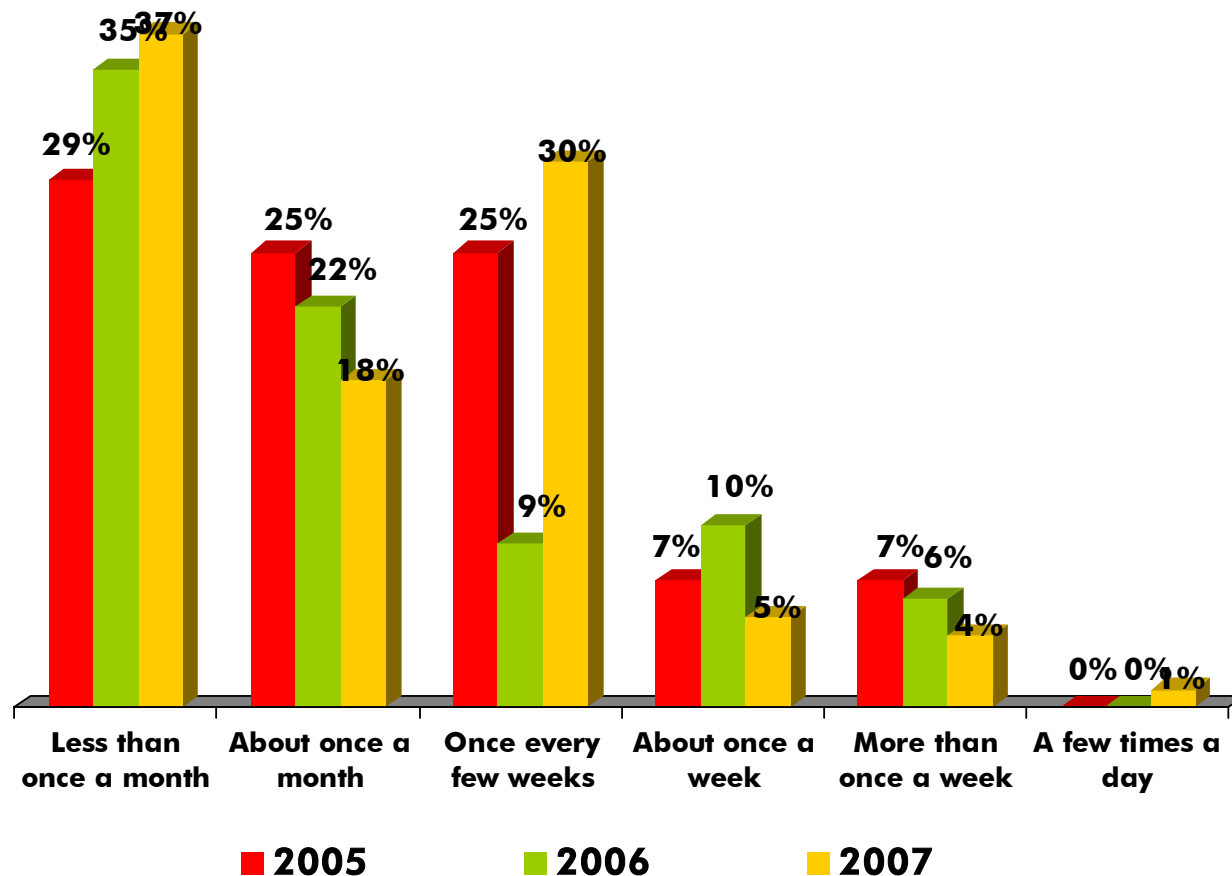
Performance of current services

Effectively managing its financial resources



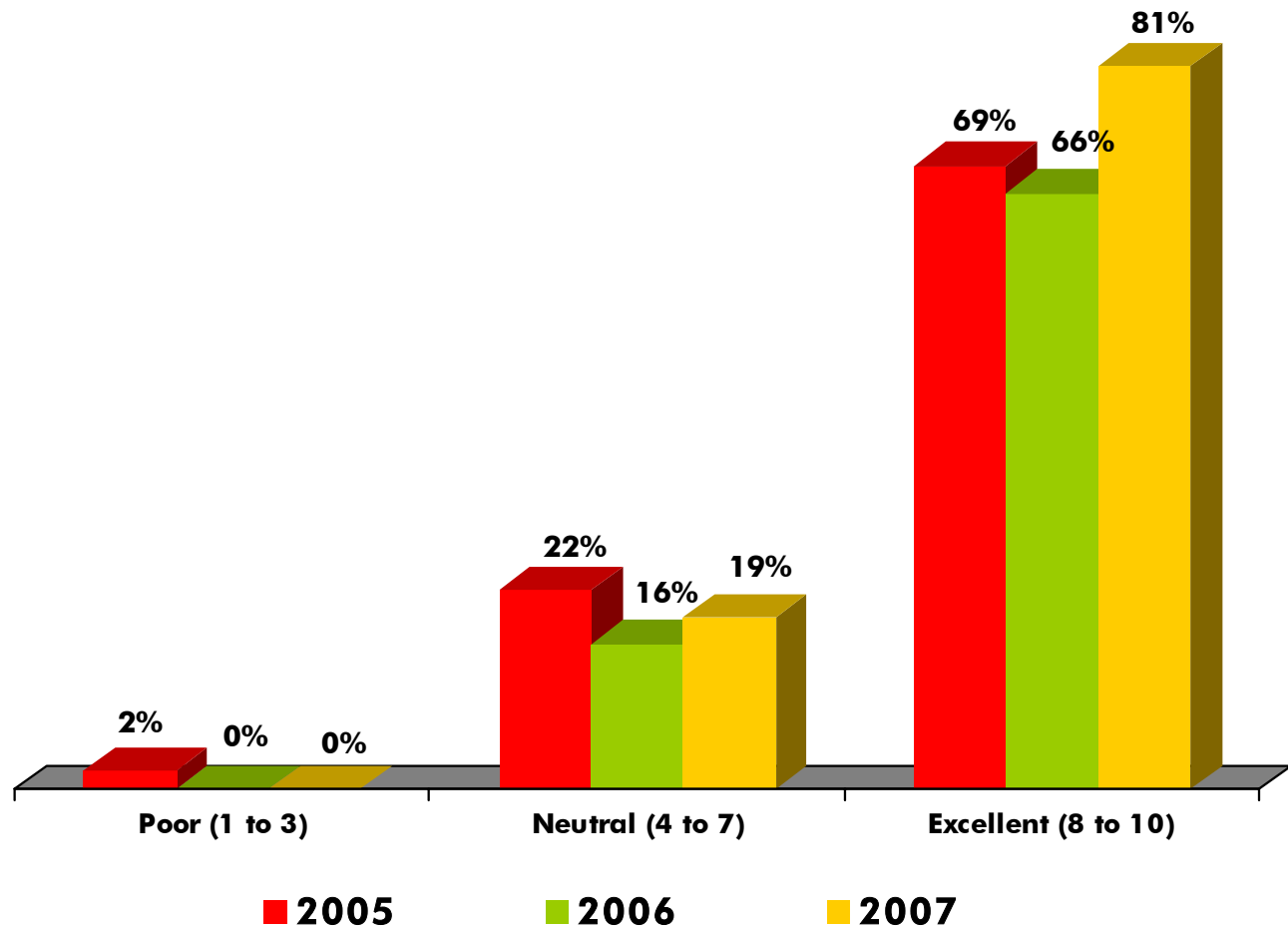
Contact with account manager

How often are you in direct contact with your account manager at the IESO?



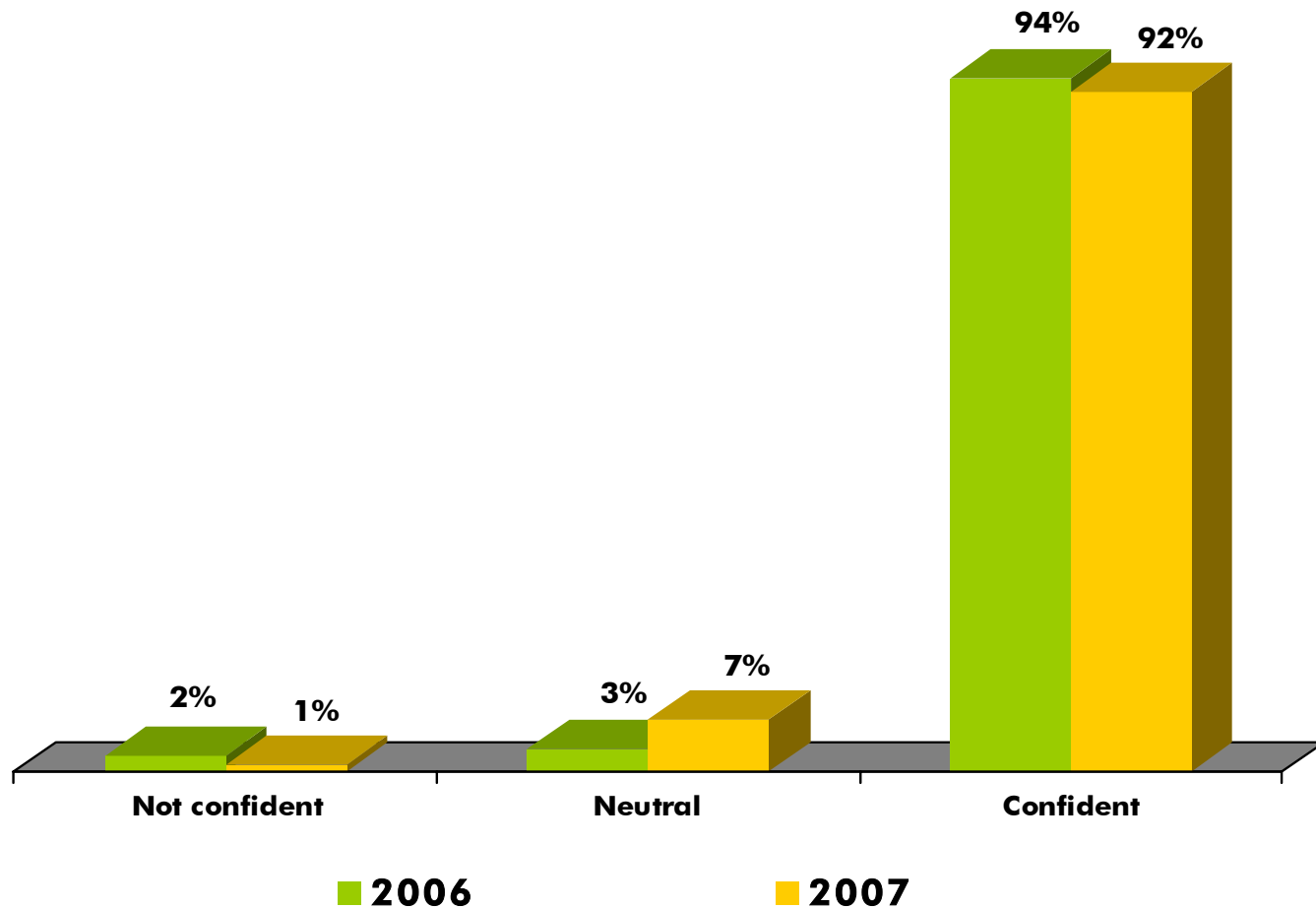
Relationship with account manager

Using the 10 point scale we used earlier, how would you rate your relationship with your account manager?



Confidence in IESO reliability

Overall, would you say that you are very confident, somewhat confident, neutral, not very confident, or not at all confident in the IESO's handling of its critical role of reliability?



Confidence in market administration

Overall, would you say that you are very confident, somewhat confident, neutral, not very confident, or not at all confident in the IESO's handling of its critical role of market administration?

