

May 19, 2021

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Mr. Druce:

**AESO Bulk and Regional Tariff
Addendum Instruction Letter for Expert Report**

Further to our Instruction Letter for Expert Report, dated April 11, 2021 (the “**Instruction Letter**”), and our recent discussions, we ask that you please add to the Expert Report as follows:

Produce an analysis of the potential for customers to respond to the Recommended Rate Design by adopting behind-the-fence generation, including a quantitative assessment of the scale of that effect, if any.

We ask that you target a final version by May 25, 2021. This should be a stand-alone document ready for stakeholder review, and incorporated into the Final Expert Report later. Please (a) set out technical elements and calculations in an appendix, and (b) do not present any commercially sensitive, customer specific-data in the analysis.

Also, our Instruction Letter refers to a May 17 deadline to complete the Expert Report. As you know, that deadline has been paused pending the AESO’s request to file its Bulk and Regional Tariff in the Fall of this year.

In preparing the above, please adhere to the assumptions and duties as set out previously in our Instruction Letter. Please contact us if you have any questions or concerns with the above.

Yours very truly,



Matthew D. Keen
Partner