

Applicability

7.1 This section of the **ISO tariff** applies to the owner (as that term is defined in the **Act**) of a generating facility, being a **generating unit** or an **aggregated generating facility**:

- (a) with a **maximum capability** that is or will be greater than 1 MW;
- (b) that is or will be connected to the **transmission system** or an **electric distribution system** on or after January 1, 2006; and
- (c) for which revenue metering equipment to measure hourly **metered energy** has been installed.

Determination of Owner’s Contribution

7.2 The **ISO** must calculate an owner’s contribution for a generating facility as:

- (a) the **maximum capability** of the generating facility;
multiplied by
- (b) the owner’s contribution rate (i.e., Column B, in subsection 7.3 below) for the area of the **transmission system** where the generating facility will be located (i.e., Column A, in subsection 7.3 below).

Owner’s Contribution Rates

7.3(1) An owner’s contribution rates for the area of the **transmission system** where the generating facility will be located are as follows:

| Column A | Column B |
|-----------------|-------------------|
| Planning Region | Contribution Rate |
| Northwest | \$10,000 / MW |
| Northeast | \$30,000 / MW |
| Edmonton | \$20,000 / MW |
| Central | \$20,000 / MW |
| Calgary | \$30,000 / MW |
| South | \$50,000 / MW |

7.3(2) The planning regions are defined as follows:

| Planning Region | Planning Region Description | Planning Area Number | Planning Area Name |
|-----------------|---|----------------------|----------------------------|
| Northwest | This region borders Fort McMurray and Athabasca to the east, Wabamun and Hinton/Edson to the south, British Columbia to the west and the Northwest Territories to the north. | 17 | Rainbow Lake |
| | | 18 | High Level |
| | | 19 | Peace River |
| | | 20 | Grande Prairie |
| | | 21 | High Prairie |
| | | 22 | Grande Cache |
| | | 23 | Valleyview |
| | | 24 | Fox Creek |
| | | 26 | Swan Hills |
| Northeast | This region borders High Level, Peace River, High Prairie, Swan Hills and Wabamun areas to the west, Edmonton, Fort Saskatchewan, Vegreville and Cold Lake areas to the south, Northwest Territories to the north and Saskatchewan to the east. | 25 | Fort McMurray |
| | | 27 | Athabasca/ Lac La Biche |
| | | 33 | Fort Saskatchewan. |
| Edmonton | This region borders Swan Hills, Athabasca and Fort Sask. areas to the north, Hinton and Dayton Valley to the west, Red Deer and Alliance to the south and Vegreville to the east. | 31 | Wetaskiwin |
| | | 40 | Lake Wabamun |
| | | 60 | Edmonton |

| Planning | Planning Region Description | Planning | Planning Area Name |
|----------|--|----------|-----------------------|
| Central | This region borders Grande Cache, Fox Creek, Swan Hills, Wabamun, Wetaskiwin, Fort Saskatchewan and Cold Lake to the north, British Columbia to the west, Saskatchewan to the east and Seebe, Airdrie, Strathmore, Sheerness and Empress to the south. | 13 | Lloydminster |
| | | 28 | Cold Lake |
| | | 29 | Hinton/Edson |
| | | 30 | Drayton Valley |
| | | 32 | Wainwright |
| | | 34 | Abraham Lake |
| | | 35 | Red Deer |
| | | 36 | Alliance/Battle River |
| | | 37 | Provost |
| | | 38 | Caroline |
| | | 39 | Didsbury |
| | | 42 | Hanna |
| | | 56 | Vegreville |
| Calgary | This region includes Calgary and Airdrie. This region borders Didsbury to the north, Seebe to the west, Strathmore to the south and High River and Hanna to the east. | 6 | Calgary |
| | | 57 | Airdrie |

| Planning | Planning Region Description | Planning | Planning Area Name |
|----------|---|----------|--------------------|
| South | This region borders Abraham Lake, Caroline, Didsbury, Hanna, Calgary and Airdrie to the north, Montana to the south, British Columbia to the west and Saskatchewan to the east. | 4 | Medicine Hat |
| | | 43 | Sheerness |
| | | 44 | Seebe |
| | | 45 | Strathmore/Blackie |
| | | 46 | High River |
| | | 47 | Brooks |
| | | 48 | Empress |
| | | 49 | Stavely |
| | | 52 | Vauxhall |
| | | 53 | Fort MacLeod |
| | | 54 | Lethbridge |
| | | 55 | Glenwood |

Invoice and Payment of Owner’s Contribution

7.4(1) The ISO must invoice the owner of a generating facility for the owner’s contribution for a generating facility prior to the time that a *System Access Service Agreement* is required to be executed in accordance with subsections 3.6(1), 3.8(1) and 3.8(3) of the ISO tariff, *System Access Service Requests*.

7.4(2) The owner of a generating facility must pay the owner’s contribution for a generating facility to the ISO by way of electronic funds transfer or wire transfer to a bank account the ISO specifies and at the time specified in accordance with subsections 3.6(9), 3.8(1) and 3.8(3) of the ISO tariff, *System Access Service Requests*.

Refund of Owner’s Contribution

7.5(1) The ISO must refund a contribution for a generating facility to the owner who originally paid it, or as otherwise directed by the owner who originally paid it, if the generating facility satisfies the ISO rules regarding satisfactory annual performance, in accordance with the provisions of this subsection 7.5.

7.5(2) The ISO must refund an owner’s contribution for a generating facility in annual amounts during the refund period, which begins on January 1 following the initial **contract capacity** date specified in section 4 of the *System Access Service Agreement* for Rate STS and ends 9 calendar years later on December 31.

7.5(3) The ISO must calculate the annual amounts during the refund period as:

- (a) 5.6% of the contribution for a generating facility, in each of the first through fourth calendar years in the refund period;

- (b) 11.2% of the contribution for a generating facility, in the fifth calendar year in the refund period; and
- (c) 16.6% of the contribution for a generating facility, in each of the sixth through ninth calendar years in the refund period.

7.5(4) The **ISO** must refund, as follows, an owner’s contribution for a generating facility, for each calendar year during the refund period, the annual amount determined under subsection 7.5(3) above:

- (a) in full if the generating facility completely satisfies the performance criteria established in section 505.2 of the **ISO rules**, *Performance Criteria for Refund of Generating Unit Owner’s Contribution*, during that calendar year;
- (b) reduced in proportion to the performance assessment calculated in accordance with section 505.2 of the **ISO rules**, *Performance Criteria for Refund of Generating Unit Owner’s Contribution*, if the generating facility does not fully satisfy the performance criteria during that calendar year; or
- (c) reduced to zero dollars if the generating facility has not energized:
 - (i) before the start of the first calendar year following the initial **contract capacity** date(s) specified in section 4 of the *System Access Service Agreement* for Rate STS; or
 - (ii) before the start of the calendar years that follow.

7.5(5) The **ISO** must refund the amount of an owner’s contribution for a generating facility determined in accordance with subsections 7.5(3) and (4) above by February 28 of the year following the calendar year to which the refund relates.

7.5(6) The **ISO** must refund the annual amounts without interest.

Adjustment of Refunds

7.6(1) The **ISO** must revise the refund of an annual amount without interest, in whole or in part, if the **ISO** determines that an error was made or that an inappropriate amount was refunded.

7.6(2) An owner must return a refund of an annual amount, in whole or in part, if the **ISO** determines that an error was made or that an inappropriate amount was refunded.

Revision History

| Effective | Description |
|------------|--|
| 2023-xx-xx | Updated charges, as applied for in the 2023 ISO tariff update application. |
| 2021-01-01 | Revised and reformatted all subsections, as approved in Commission Decision 25175-D02-2020 issued on November 30, 2020. |
| 2013-07-01 | Updated subsections, as approved in Commission Decision 3473-D01-2015 issued on June 17, 2015. |
| 2011-07-01 | Revised and reformatted all subsections, as approved in Commission Decision 2011-275 issued on June 24, 2011. |