

# 2020 Plan for Energy Storage Roadmap Integration Activities



Classification	ES Roadmap Integration Activities	2020 Q1			2020 Q2			2020 Q3			2020 Q4		
		J	F	M	A	M	J	J	A	S	O	N	D
Education and Awareness	<b>ES Progress Updates NEW</b> Share progress on the ES Roadmap integration activities, interrelated initiatives as well as provide a forum to address stakeholder questions.			E			E			E			E
	<b>ES Industry Learnings Forum (ESILF) NEW</b> Organize forum to provide expertise and key learnings to the AESO on targeted matters related to the integration of energy storage in Alberta.				E			E		E		E	
Active Connection Projects	<b>Participation under Existing Market Rules</b> Develop and/or modify Information Documents (IDs) to provide clarity under existing market rules as required.	C		E	I								
	<b>Interim AESO System Modifications</b> Define and implement requirements for AESO system modifications that need to be made to support in-service dates for active connection projects.	I											
Phase 1 Short-term Implementation	<b>System Access Service Request (SASR) Form Modification</b> Investigate requirements to modify the SASR Form to improve the collection of connection information required for ES assets.	C				I							
	<b>ISO Tariff Design</b> Work in concert with ISO tariff design to ensure ES is incorporated.	Progress will align with Bulk and Regional Tariff Design											
Phase 2 Long-term Implementation	<b>Forecasting, Planning and Market Reports</b> Develop and implement forecast/planning models to support Long-term Outlook (LTO) / Long-term Transmission Plan (LTP).		A										
	<b>Configuration, Qualification and Connection Requirements</b> Develop appropriate functional specification documents; identify market participation options, permissible configurations and metering requirements.		A					C					
	<b>Market Participation</b> Evaluate the characteristics of the different ES assets and the markets they could participate in; provide input into the potential configurations of ES assets and their ability to participate in the markets.		A					C					
	<b>Operations</b> Perform technical studies for the review of the operating parameters and requirements for the different types and configurations of ES; identify the impact to the connection processes and system applications to enable full range of ES operation.		A					C					
	<b>Storage as a Transmission Alternative (SATA)</b> Develop evaluation criteria and quantification of benefits of SATA as a non-wire solution; identify technical parameters and configurations, asset ownership and market participation options for SATA.		A					C					

ES integration process phases: Analysis (A), Conception (C), Development (D), Regulatory (R), Implementation (I), Engagement (E)