

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	ES Progress Updates – UPDATED Share progress on the Energy Storage (ES) Roadmap integration activities, interrelated initiatives as well as provide a forum to address stakeholder questions.			E				E		E			E
	ES Industry Learnings Forum (ESILF) – UPDATED 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	
Active Connection Projects	Participation under Existing Market Rules – COMPLETE Develop and/or modify Information Documents (IDs) to provide clarity under existing market rules as required.	C			E		I						
	Interim AESO System Modifications – COMPLETE Define and implement requirements for AESO system modifications that need to be made to support in-service dates for active connection projects under the existing framework.				I								
Phase 1 Short-term Implementation	System Access Service Request (SASR) Form Modification – COMPLETE Investigate requirements to modify the SASR Form to improve the collection of connection information required for ES assets.	C					I						
	ISO Tariff Design – ON HOLD Work in concert with ISO tariff design to ensure ES is considered.	Progress will align with Bulk and Regional Tariff Design											
Phase 2 Long-term Implementation	Forecasting, Planning and Market Reports Develop and implement forecasting and planning models to support Long-term Outlook (LTO) and Long-term Transmission Plan (LTP).			A									
	Configuration, Qualification and Connection Requirements Develop appropriate functional specification documents; identify market participation options, permissible configurations and metering requirements for ES.		A						C				
	Market Participation Evaluate long-term options for energy storage participation in the Energy and Ancillary Service markets.		A						C				
	Operations 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				
	Storage as a Transmission Alternative (SATA) 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)