

Information documents are not authoritative. Information documents are for information purposes only and are intended to provide guidance. In the event of any discrepancy between an information document and any authoritative document<sup>1</sup> in effect, the authoritative document governs.

## 1 Purpose

This information document relates to the following authoritative documents:

- Section 505.2 of the ISO rules, *Performance Criteria for Refund of Generating Unit Owner's Contribution* ("Section 505.2"); and
- Section 10 of the ISO tariff,<sup>2</sup> *Generating Unit Owner's Contribution*.

The purpose of this information document is to provide guidance specific to energy storage and the performance assessment calculation for a generating unit owner's contribution. While the current authoritative documents relating to the generating unit owner's contribution do not prohibit energy storage, they do not fully contemplate the unique attributed and challenges associated with it, so the AESO is providing further clarity specific to energy storage.

## 2 Energy Storage

A generating unit owner's contribution is applied to new and incremental generation connecting to the transmission system in accordance with the provisions of the applicable ISO tariff.

### 2.1 Availability Assessment

The configuration of a site with an energy storage facility<sup>3</sup> will determine the method by which the AESO will calculate the availability assessment used to determine the refund of generating unit owner's contribution for the calendar year.

The AESO will determine the availability assessment pursuant to subsection 3 of Section 505.2 for:

- a stand-alone energy storage site;
- a hybrid site<sup>4</sup> that does not include a wind or solar aggregated generating facility; and
- a renewable hybrid site (which includes a wind or solar aggregated generating facility), that is offered as a single source asset and supports the ability to stay within the "allowable dispatch variance" as set out in part (i) of the definition in the AESO Consolidated Authoritative Document Glossary.<sup>5</sup>

The AESO will determine the availability assessment pursuant to subsection 4 of Section 505.2 for a renewable hybrid site (which includes a wind or solar aggregated generating facility) that is offered as a single source asset and supports the ability to stay within the "allowable dispatch variance" as set out in part (ii) or part (iii) of the definition in the AESO Consolidated Authoritative Document Glossary.

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<sup>1</sup> "Authoritative document" is the general name given by the AESO to categories of documents made by the AESO under the authority of the *Electric Utilities Act* and associated regulations, and that contain binding legal requirements for either market participants or the AESO, or both. Authoritative documents include: the ISO rules, the reliability standards, and the ISO tariff.

<sup>2</sup> 2020 ISO Tariff effective 2020-04-01.

<sup>3</sup> Information Document #2020-013, *Energy Storage Guidance Document* provides additional detail on energy storage configurations.

<sup>4</sup> Information Document #2020-013, *Energy Storage Guidance Document* provides additional detail on hybrid facilities.

<sup>5</sup> Information Document #2020-013, *Energy Storage Guidance Document* provides additional detail on generating unit dispatch tolerances and allowable dispatch variance.

# Information Document Performance Criteria for Energy Storage ID #2020-003



For the purposes of maintaining availability for the performance assessment factor of the generating unit owner's contribution refund, information regarding how a pool participant with an energy storage facility may manage their offers, state of charge, and available capability is available in the following information documents:

- ID #2020-013, *Energy Storage Guidance Document*;
- ID #2012-008R, *Energy Offers and Bids*; and
- ID #2012-009R, *Restatements*.

## Revision History

Posting Date	Description of Changes
2020-06-19	Initial release