

August 2, 2011

To: Market Participants and Interested Parties

Re: Update on the Transition of AESO's Technical Requirements to ISO Rules

The purpose of this communication is to provide stakeholders with an update on the transition of the AESO's Technical Requirements (Technical Requirements)¹ to ISO Rules, and inform stakeholders of two new ISO rules that will be developed setting out the technical requirements for substations and system communications.

Transition of the AESO's Technical Requirements to ISO Rules

As part of the [Transition of Authoritative Documents \(TOAD\) project](#) the AESO is reviewing all its documents and setting out the binding requirements and obligations for market participants and the AESO in authoritative documents; those being ISO rules, ISO tariff or Alberta Reliability Standards. As such, the Technical Requirements are being transitioned to ISO rules and will specify the minimum set of Technical Requirements for interconnection determined critical for system reliability.

The transition of the Technical Requirements will not only include the development of ISO rules but will include the development of Information Documents, as required, to support the rules. The Information Documents will provide supplemental technical information including documentation of "best practices" and further guidance with the application of the Technical Requirements.

The AESO is committed to engaging industry workgroups, as necessary, to review the current Technical Requirements and determine the set of minimum requirements for representation in proposed new ISO rules. Once the proposed new ISO rules are drafted, the AESO will consult with stakeholders on those proposed new ISO rules in accordance with its normal rule development process which follows the requirements set out in [AUC Rule 017](#).

The new ISO Rules, once confirmed by the Alberta Utilities Commission (AUC), will supersede the Technical Requirements. Previous versions of the Technical Requirements will remain on the AESO website for reference.

¹ The Technical Requirements do not include the Distribution Point-of-Delivery Interconnection Process Guidelines. These Guidelines will be reviewed separately as part of the TOAD project.

The table below lists the set of technical requirements for connecting facilities to the transmission system and provides the status and planned schedule for each document.

Current Technical Requirements	AESO Lead	Transition Status
Wind Power Technical Requirements	John Kehler John.kehler@aeso.ca (403) 539-2622	Transition is complete. The technical requirements have been transitioned to Part 500 Facilities, Division 502 Technical Requirements, Section 502.1, "Wind Aggregated Generating Facilities Technical Requirements" of the ISO Rules .
Transmission Line Requirements	Dan Shield Dan.shield@aeso.ca (403) 539-2502	Transition is complete. The technical requirements have been transitioned to Part 500 Facilities, Division 502 Technical Requirements, Section 502.2, "Bulk Transmission Line Technical Requirements" of the ISO Rules .
Operational Voice Communication Standard	Don Adair Don.adair@aeso.ca (403) 539-2520	Transition is complete. The technical requirements have been transitioned to Part 500 Facilities, Division 502 Technical Requirements, Section 502.4, "Automated Dispatch and Messaging System and Voice Communication System Requirements" of the ISO Rules .
Transmission Data Modelling Requirements	Pamela Maclean Pamela.maclean@aeso.ca (403) 539-2606	ISO Rules OPP 1306 sets out the requirements for reporting equipment changes to the AESO. Transition of ISO Rules OPP 1306 into proposed new ISO rules has commenced. The AESO plans to initiate stakeholder consultation on the proposed new ISO rules in October 2011. The transition of the Transmission Data Modelling requirements is complete. This information has been transitioned to Information Document 2010-001R – Transmission Modelling Data Requirements
Protection Standard	Dan Shield Dan.shield@aeso.ca (403) 539-2502	Transition of the Protection standard has commenced. The AESO plans to commence stakeholder consultation on the proposed ISO rule in September, 2011.
Generator/Load Requirements	Ron Strem Ron.strem@aeso.ca (403) 539-2472	Transition of the Generation/Load standard has commenced. The AESO is developing two new ISO rules; one ISO rule focusing on the generation requirements and the other ISO rule focusing on the load requirements. The AESO plans to initiate stakeholder consultation on these proposed new ISO rules in October, 2011.
SCADA Standard	Don Adair Don.adair@aeso.ca (403) 539-2520	Transition of the SCADA standard has commenced. The AESO plans to commence stakeholder consultation on the proposed new ISO rules by December 2011.
Phasor	Ming Hu	The AESO plans to commence the transition of the

Measurement Unit Requirements	Ming.hu @aeslo.ca (403) 539-2503	Phasor Measurement Unit Requirements in 2012.
Revenue Metering Requirements	Dan Shield Dan.shield@aeslo.ca (403) 539-2502	The AESO plans to commence the transition of the Revenue Metering requirements in 2012.

Development of New ISO Rules

In addition to the technical requirements and proposed new ISO rules discussed above, the AESO plans to develop proposed new ISO rules setting out the technical requirements for substations and the technical requirements for telecommunications. The schedule and contact information for each of is below.

New ISO Rules		
Substation technical requirements	Hui Zhang Hui.Zhang@aeslo.ca (403) 539-2890	The AESO plans to commence development of the Substation requirements in 2012.
Telecommunication Requirements	Don Adair Don.adair@aeslo.ca (403) 539-2520	The AESO plans to initiate stakeholder consultation on the proposed new ISO rules in 2012.

The AESO appreciates stakeholders' on-going support during the transition of the Technical Requirements. Any comments regarding the transition of the Technical Requirements can be directed to the AESO leads in the table above. Comments regarding the TOAD project can be directed to Evelyn Kelly at evelyn.kelly@aeslo.ca or at (403) 539 – 2468.

Yours truly,

Shan Bhattacharya
Vice President, Transmission