

AESO Assessment and Conversion of WECC BAL-002-WECC-1 to Alberta BAL-002-WECC-AB- 1 Contingency Reserves			
Section	WECC BAL-002-WECC-1	Alberta BAL-002-WECC-AB-1	Reason for Difference
<b>Purpose</b>	Contingency Reserve is required for the reliable operation of the interconnected power system. Adequate generating capacity must be available at all times to maintain scheduled frequency, and avoid loss of firm load following transmission or generation contingencies. This generating capacity is necessary to replace generating capacity and energy lost due to forced outages of generation or transmission equipment.	<u>The purpose of this reliability standard is to ensure the ISO carries the contingency reserve required for the reliable operation of the interconnected power system to maintain scheduled frequency and avoid loss of firm load following transmission or generation contingencies.</u>	Consistent writing style and format with Alberta reliability standards.
<b>Applicability</b>	4.1 Balancing Authority 4.2 Reserve Sharing Group	4.1 <u>ISO</u>	Identify the responsible entity in Alberta.  The scope of the Alberta reliability standard does not cover the requirements for the reserve sharing group.
<b>Effective Date</b>	On the first day of the next quarter, after receipt of applicable regulatory approval.	<u>Same date as the implementation date in the WECC, which is expected to be on the first day of the following quarter after receipt of FERC approval.</u>	
<b>Definitions</b>		Italicized terms used in this reliability standard have the same meanings as set out in the Alberta Reliability Standards	Added definitions section to the Alberta reliability standard.

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		Glossary of Terms and Part 1 of the ISO Rules. <sup>1</sup>	
<b>Requirement</b>	R1. Each Reserve Sharing Group or Balancing Authority that is not a member of a Reserve Sharing Group shall maintain as a minimum Contingency Reserve that is the sum of the following: [Violation Risk Factor: Medium] [Time Horizon: Real-time Operations]	<p>R1. <del>If Alberta is disconnected from the WECC system and therefore not able to participate in the North West Power Pool reserve sharing group, the ISO must</del> maintain as a minimum contingency reserve <del>that is the greater of:</del></p> <ul style="list-style-type: none"> <li><del>An amount equal to the loss of the most severe single contingency (MSSC) or</del></li> <li><del>An amount equal to the sum of three percent of the load (generation minus station service minus net actual interchange) and three percent of net generation (generation minus station service)</del></li> </ul>	

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<sup>1</sup> Defined terms are not italicized in this document, but will appear in the Alberta Reliability Standards document.

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Measure	M1. The Reserve Sharing Group or Balancing Authority that is not a member of a Reserve Sharing Group has documentation that it maintained 100% of required Contingency Reserve levels based upon data integrated over each clock hour except within the first 105 minutes (15 minute Disturbance Recovery Period, plus 90 minute Contingency Reserve Restoration Period) following an event requiring the activation of Contingency Reserves. For each hour Reserve Sharing Group or Balancing Authority shall have and provide upon request their Contingency Reserve Requirement in MW, how the requirement was calculated, and amount of Contingency Reserve available in MW. E-tags and/or contracts shall be provided to document any transactions under R1.2 and R1.3.	<u>MR1. For each hour the ISO must have and provide upon request their contingency reserve requirement in MW, how the requirement was calculated, and amount of contingency reserve available in MW. E-tags and/or contracts shall be provided to document any transactions under R1.</u>	The ISO is not mandated to give direction to or to hold responsible for any RSG requirements.  M1 actually contain some embedded requirements and they are transferred to a R4.
Requirement	R1.1. The greater of the following:	▼	Incorporated into R1
Measure			
Requirement	R1.1.1. An amount of reserve equal to the loss of the most severe single contingency; or	▼	Incorporated into R1

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Section	WECC BAL-002-WECC-1	Alberta BAL-002-WECC-AB-1	Reason for Difference
Measure			
Requirement	<b>R1.1.2.</b> An amount of reserve equal to the sum of three percent of the load (generation minus station service minus Net Actual Interchange) and three percent of net generation (generation minus station service).	▼	Incorporated into R1
Measure			
Requirement	<b>R1.2.</b> If the Source Balancing Authority designates an Interchange Transaction(s) as part of its Non-Spinning Contingency Reserve, the Sink Balancing Authority shall carry an amount of additional Non-Spinning Contingency Reserve equal to the Interchange Transaction(s). This type of transaction cannot be designated as Spinning Reserves by the source BA. If the Source Balancing Authority does not designate the Interchange Transaction as part of its Contingency Reserve, the Sink Balancing Authority is not required to carry any additional Contingency Reserves under this Requirement.	▼	Not applicable in Alberta as this is not a current practice in Alberta.
Measure			
Requirement	<b>R1.3.</b> If the Sink Balancing Authority is designating an Interchange Transaction(s) as part of its Contingency Reserve either Spinning or Non-Spinning,	▼	Not applicable in Alberta as this is not a current practice in Alberta.

**Deleted: R1.1.2.** An amount of reserve equal to the sum of three percent of the load (generation minus station service minus Net Actual Interchange) and three percent of net generation (generation minus station service).

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**Deleted: R1.2.** If the Source Balancing Authority designates an Interchange Transaction(s) as part of its Non-Spinning Contingency Reserve, the Sink Balancing Authority shall carry an amount of additional Non-Spinning Contingency Reserve equal to the Interchange Transaction(s). This type of transaction cannot be designated as Spinning Reserves by the source BA. If the Source Balancing Authority does not designate the Interchange Transaction as part of its Contingency Reserve, the Sink Balancing Authority is not required to carry any additional Contingency Reserves under this Requirement.

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	the Source Balancing Authority shall increase its Contingency Reserves equal in amount and type, to the capacity transaction(s) where the Sink Balancing Authority is designating the transaction(s) as a resource to meet its Contingency Reserve requirements. These types of transactions could be designated as either spinning or non-spinning reserves. If designated as Spinning Reserves, all of the requirements of section R2.1 & R2.2 must be met.		
<b>Measure</b>			
<b>Requirement</b>	R2. Each Reserve Sharing Group or Balancing Authority that is not a member of a Reserve Sharing Group shall maintain at least half of the Contingency Reserve in R1.1 as Spinning Reserve. Any Spinning Reserve specified in R1 shall meet the following requirements. [Violation Risk Factor: High] [Time Horizon: Real-time Operations]	R2. <del>The ISO must maintain at least half of the contingency reserve in R1, as spinning reserve, except within the first 105 minutes following an event requiring the activation of contingency reserve.</del>	

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Section	WECC BAL-002-WECC-1	Alberta BAL-002-WECC-AB-1	Reason for Difference
Measure	<b>M2.</b> The Reserve Sharing Group or Balancing Authority that is not a member of a Reserve Sharing Group has documentation that it maintained at least 100% of minimum Spinning Contingency Reserve required based upon data averaged over each clock hour except within the first 105 minutes following an event requiring the activation of Contingency Reserves. For each hour, Reserve Sharing Group or Balancing Authority that is not a member of a Reserve Sharing Group shall have and provide upon request the Spinning Reserve Requirement in MW and amount of Spinning Reserve available in MW that is automatically responsive to frequency and can be fully deployed in 10 minutes.	<b>MR2.</b> <u>E-tags, contracts or other data exist showing R2 was met.</u>	
Requirement	<b>R2.1.</b> Immediately and automatically responds proportionally to frequency deviations, e.g. through the action of a governor or other control systems.	<b>R2.1.</b> Immediately and automatically responds proportionally to frequency deviation, e.g. through the action of a governor or other control systems.	
Measure		<b>MR2.1</b> <u>E-tags, contracts or other data exist showing R2.1 was met.</u>	
Requirement	<b>R2.2.</b> Capable of fully responding within ten minutes.	<b>R2.2.</b> Capable of fully responding within ten minutes.	

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Section	WECC BAL-002-WECC-1	Alberta BAL-002-WECC-AB-1	Reason for Difference
Measure		<u>MR2.2 E-tags, contracts or other data exist showing R2.2 was met.</u>	
Requirement	R3. Each Reserve Sharing Group or Balancing Authority shall use the following acceptable types of reserve which must be fully deployable within 10 minutes of notification to meet R1: [Violation Risk Factor: Medium] [Time Horizon: Real-time Operations] .	<p>R3. <u>The ISO must use contingency reserve fully deployable in 10 minutes including:</u></p> <ul style="list-style-type: none"> <li>• <u>Spinning reserve</u></li> <li>• <u>Interruptible load</u></li> <li>• <u>Interchange transactions designated by the source balancing authority as contingency reserve</u></li> <li>• <u>Reserve held by other entities by agreement that is deliverable on firm transmission service</u></li> <li>• <u>Off-line generation which can be synchronized and generating</u></li> <li>• <u>Load, other than interruptible load, once the reliability coordinator has declared a capacity or energy emergency.</u></li> </ul>	

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Section	WECC BAL-002-WECC-1	Alberta BAL-002-WECC-AB-1	Reason for Difference
Measure	M3. The Reserve Sharing Group or Balancing Authority that is not a member of a Reserve Sharing Group has documentation that it used the acceptable types of reserve for each hour to meet R3.	<p><u>MR3. If Alberta is not connected to the WECC system and therefore not able to participate in the North West Power Pool reserve sharing group it must have</u> documentation that it used the acceptable types of reserve for each hour to meet R3.</p> <p><u>MR3.1. If the ISO utilizes load other than interruptible load it must submit documentation demonstrating that the reliability coordinator declared a capacity and/or energy emergency prior to utilizing load for contingency reserves in R3.</u></p>	
Requirement	R3.1. Spinning Reserve		The following requirements R3.1 to R3.6 were removed and the list created in R3
Measure	M3.1 Any Reserve Sharing Group or Balancing Authority utilizing Load other than Interruptible Load shall submit documentation demonstrating that the Reliability Coordinator declared a Capacity and/or Energy Emergency prior to utilizing Load for Contingency Reserves.		
Requirement	R3.2. Interruptible Load;		
Measure			
Requirement	R3.3. Interchange Transactions designated by the source Balancing		

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	Authority as non-spinning contingency reserve;		
<b>Measure</b>			
<b>Requirement</b>	<b>R3.4.</b> Reserve held by other entities by agreement that is deliverable on Firm Transmission Service;	▼	
<b>Measure</b>			
<b>Requirement</b>	<b>R3.5.</b> An amount of off-line generation which can be synchronized and generating; or	▼	
<b>Measure</b>			
<b>Requirement</b>	<b>R3.6.</b> Load, other than Interruptible Load, once the Reliability Coordinator has declared a capacity or energy emergency	▼	
		<b>R4.</b> If <a href="#">Alberta is separated from the WECC system and therefore not able to participate in the North West Power Pool reserve sharing group</a> , the ISO it must maintain 100% of required contingency reserve levels based upon data integrated over each clock hour except within the first 105 minutes (15 minute disturbance recovery period, plus 90 minute contingency reserve restoration period) following an event requiring the activation of contingency reserves.	Transferred from the M1 in the NERC standard.
<b>Measure</b>		<a href="#">MR4. E-tags, contracts or other data exist</a>	

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**Deleted: R3.5.** An amount of off-line generation which can be synchronized and generating; or

**Deleted: R3.6.** Load, other than Interruptible Load, once the Reliability Coordinator has declared a capacity or energy emergency

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		<a href="#">showing R4 was met.</a>	
<b>Procedures</b>			
<b>Compliance</b>	<p><b>1. Compliance Monitoring Process</b></p> <p><b>1.1 Compliance Monitoring Responsibility</b> Compliance Enforcement Authority</p> <p><b>1.2 Compliance Monitoring Period</b> The Compliance Enforcement Authority may use one or more of the following methods to assess compliance:</p> <ul style="list-style-type: none"> <li>- Reports conducted quarterly</li> <li>- Spot check audits conducted anytime with 30 days notice given to prepare</li> <li>- Periodic audit as scheduled by the Compliance Enforcement Authority</li> <li>- Investigations</li> <li>- Other methods as provided for in the Compliance Monitoring Enforcement Program</li> </ul> <p>Reserve Sharing Groups and Balancing Authorities shall submit to their Compliance Enforcement Authority a Contingency Reserve verification report on or before the tenth business day following the end of each calendar quarter.</p> <p><b>1.2.1 Compliance Monitoring Period:</b></p>		<p>There is no compliance section currently proposed in the Alberta Reliability Standards.</p> <p>A compliance program will be developed at a later date for Alberta Reliability Standards that recognizes the compliance monitoring and enforcement structure in Alberta.</p> <p>This approach is deemed consistent with the existing ISO Rules.</p>

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	<p>One Clock Hour.</p> <p><b>1.2.2</b> The Performance-reset Period is calendar quarter.</p> <p><b>1.3 Data Retention</b> Reserve Sharing Groups and Balancing Authorities shall keep evidence for Measure M.1 through M3 for three years plus current, or since the last audit, whichever is longer.</p> <p><b>1.4. Additional Compliance Information</b></p> <p><b>1.4.1.</b> This Standard shall apply to a Reserve Sharing Group that has registered with the WECC as provided in Section 1.4.2, and each Balancing Authority identified in the registration shall be responsible for compliance with this Standard through its participation in the Reserve Sharing Group and not on an individual basis.</p> <p><b>1.4.2.</b> A Reserve Sharing Group may register as the Responsible Entity for purposes of compliance with this Standard by providing written notice to the WECC (a) indicating that the Reserve Sharing Group is registering as the</p>		

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<b>Section</b>	<b>WECC BAL-002-WECC-1</b>	<b>Alberta BAL-002-WECC-AB-1</b>	<b>Reason for Difference</b>
	<p>Responsible Entity for purposes of compliance with this Standard, (b) identifying each Balancing Authority that is a member of the Reserve Sharing Group, and (c) identifying the person or organization that will serve as agent on behalf of the Reserve Sharing Group for purposes of communications and data submissions related to or required by this Standard.</p> <p><b>1.4.3.</b> If an agent properly designated in accordance with Section 1.4.2 identifies individual Balancing Authorities within the Reserve Sharing Group responsible for noncompliance at the time of data submission, together with the percentage of responsibility attributable to each identified Balancing Authority, then, except as may otherwise be finally determined through a duly conducted review or appeal of the initial finding of noncompliance, (a) any penalties assessed for noncompliance by the Reserve Sharing Group shall be allocated to the individual Balancing Authorities identified in the applicable data submission in proportion to their</p>		

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	<p>respective percentages of responsibility as specified in the data submission, (b) each Balancing Authority shall be solely responsible for all penalties allocated to it according to its percentage of responsibility as provided in subsection (a) of this Section 1.4.3, and (c) neither the Reserve Sharing Group nor any member of the Reserve Sharing Group shall be responsible for any portion of a penalty assessed against another member of the Reserve Sharing Group in accordance with subsection (a) of this Section 1.4.3 (even if the member of Reserve Sharing Group against which the penalty is assessed is not subject to or otherwise fails to pay its allocated share of the penalty).</p> <p><b>1.4.4.</b> If an agent properly designated in accordance with Section 1.4.2 fails to identify individual Balancing Authorities within the Reserve Sharing Group responsible for noncompliance at the time of data submission or fails to specify percentages of responsibility attributable to each identified Balancing Authority, any penalties for noncompliance shall be assessed against the agent on behalf of</p>		

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	<p>the Reserve Sharing Group, and it shall be the responsibility of the members of the Reserve Sharing Group to allocate responsibility for such noncompliance.</p> <p><b>1.4.5.</b> Any Balancing Authority that is a member of a Reserve Sharing Group that has failed to register as provided in Section 1.4.2 shall be subject to this Standard on an individual basis.</p> <p><b>2. Violation Severity Levels for Requirement R1</b></p> <p><b>2.1. Lower:</b> There shall be a Lower Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Contingency Reserve is less than 100% but greater than or equal to 90% of the required Contingency Reserve.</p> <p><b>2.2. Moderate:</b> There shall be a Moderate Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Contingency Reserve is less than 90% but greater than or equal to 80% of the required Contingency Reserve.</p>		

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	<p><b>2.3. High:</b> There shall be a High Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Contingency Reserve is less than 80% but greater than or equal to 70% of the required Contingency Reserve.</p> <p><b>2.4. Severe:</b> There shall be a Severe Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Contingency Reserve is less than 70% of the required Contingency Reserve.</p> <p><b>3. Violation Severity Level for Requirement R2</b></p> <p><b>3.1 Lower:</b> There shall be a Lower Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Spinning Reserve is less than 100% but greater than or equal to 90% of the required Spinning Reserve.</p> <p><b>3.2. Moderate:</b> There shall be a</p>		

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	<p>Moderate Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Spinning Reserve is less than 90% but greater than or equal to 80% of the required Spinning Reserve.</p> <p><b>3.3. High:</b> There shall be a High Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Spinning Reserve is less than 80% but greater than or equal to 70% of the required Spinning Reserve.</p> <p><b>3.4. Severe:</b> There shall be a Severe Level of non-compliance if there is one hour during a calendar month in which the Balancing Authority's or the Reserve Sharing Group's Spinning Reserve is less than 70% of the required Spinning Reserve.</p> <p><b>4. Violation Severity Level for Requirement R3</b></p> <p><b>4.1 Lower:</b> Not Applicable  <b>4.2. Moderate:</b> Not Applicable  <b>4.3. High:</b> There shall be a High Level of non-compliance if there is one hour</p>		

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<b>Section</b>	<b>WECC BAL-002-WECC-1</b>	<b>Alberta BAL-002-WECC-AB-1</b>	<b>Reason for Difference</b>
	during a calendar month in which the Balancing Authority or Reserve Sharing Group used unacceptable resources for Contingency Reserves. <b>4.4. Severe:</b> Not Applicable		
<b>Regional Differences</b>			Not applicable in Alberta



### **Proposed Terms for the ARS Glossary:**

“firm transmission service” means the highest quality(priority) service offered to customers under a filed rate schedule that anticipates not planned interruption.

“interruptible load” means demand that the end-use customer makes available to its Load-Serving Entity via contract or agreement for curtailment.

“reliability coordinator” means the entity that is the highest level of authority who is responsible for the reliable operation of the *bulk electric system*, has the wide area view of the *bulk electric system*, and has the operating tools, processes and procedures, including the authority to prevent or mitigate emergency operating situations in both next-day analysis and real-time operations.

### **Defined Terms Used in this Standard:**

(As included in the ISO Rules Definitions or Alberta Reliability Standards Glossary)

“contingency reserve”

“interchange transaction

“load”

“non-spinning contingency reserve”

“sink balancing authority”

“source balancing authority”

“spinning reserves”

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**Standard Owner: Anita Lee**

**AESO Requirement Owner(s): Neil Curtis**



**AESO Subject Matter Expert(s): Ivan Doucette, Jason Murray, Rob Baker, Lane Belsher, Peter Wong, Jim Edgar**

**Work Group Comments: None**

**Work Group Response: None**

**Acceptance Recommendation:**

**Developed by: Don Olson**

<b>Name</b>	<b>Organization</b>	<b>Role</b>
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Lane Belsher	AESO	SME
Ivan Doucette	AESO	SME
Rob Baker	AESO	SME
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