Reliability Standards Discussion Group

June 2022

Notice

In accordance with its mandate to operate in the public interest, the AESO will be audio recording this session and making a discussion summary of the meeting available to the general public at www.aeso.ca. The accessibility of these discussions is important to ensure the openness and transparency of this AESO process, and to facilitate the participation of stakeholders. Participation in this session is completely voluntary and subject to the terms of this notice.

The collection of personal information by the AESO for this session will be used for the purpose of capturing stakeholder input for the Reliability Standards Discussion Group stakeholder sessions. This information is collected in accordance with Section 33(c) of the Freedom of Information and Protection of Privacy Act. If you have any questions or concerns regarding how your information will be handled, please contact the Director, Information and Governance Services at 2500, 330 – 5th Avenue S.W., Calgary, Alberta, T2P 0L4, by telephone at 403-539-2528, or by email at privacy@aeso.ca.

Asking questions in a hybrid session

- Please introduce yourself including the organization you work for before asking your question

- In-person
  - Raise your hand and the host will acknowledge you have a question and will indicate when it is your turn to speak

- Virtually
  - If you are accessing the session via your computer or smartphone
    1. Click "Raise Hand" and the host will be notified that you would like to ask a question.
       - *When it is your turn to ask a question, the host will unmute your microphone, you in turn will need to unmute your microphone before you can speak. Your name will appear on the screen, but your camera will remain turned off.*
    2. You can also ask questions by tapping the "Q&A" button and typing them in. Please include the organization you work for when typing your question into the Q&A.
       - *You can up-vote questions that have been already asked.*
  - If you are accessing the session via conference call
    - If you would like to ask a question press *9 on your phone's dial pad and the host will see that you have raised your hand.
    - The host will unmute your microphone, you in turn will need to unmute your microphone by pressing *6 before you can speak. Your number will appear on the screen.

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AESO Stakeholder Engagement Framework

OUR ENGAGEMENT PRINCIPLES

Inclusive and Accessible

Strategic and Coordinated

Transparent and Timely

Customized and Meaningful

Stakeholder participation

- The participation of everyone here is critical to the engagement process

- To ensure everyone has the opportunity to participate, we ask you to:

  - Listen to understand others' perspectives

  - Disagree respectfully

  - Balance airtime fairly

  - Keep an open mind

Welcome and Introductions

Welcome and introductions

- Ping-Kwan Keung, Manager, Standards & Modeling

- Ken Gardner, Reliability Standards Technical Advisor

- Kathryn Kuber, Reliability Standards Technical Specialist

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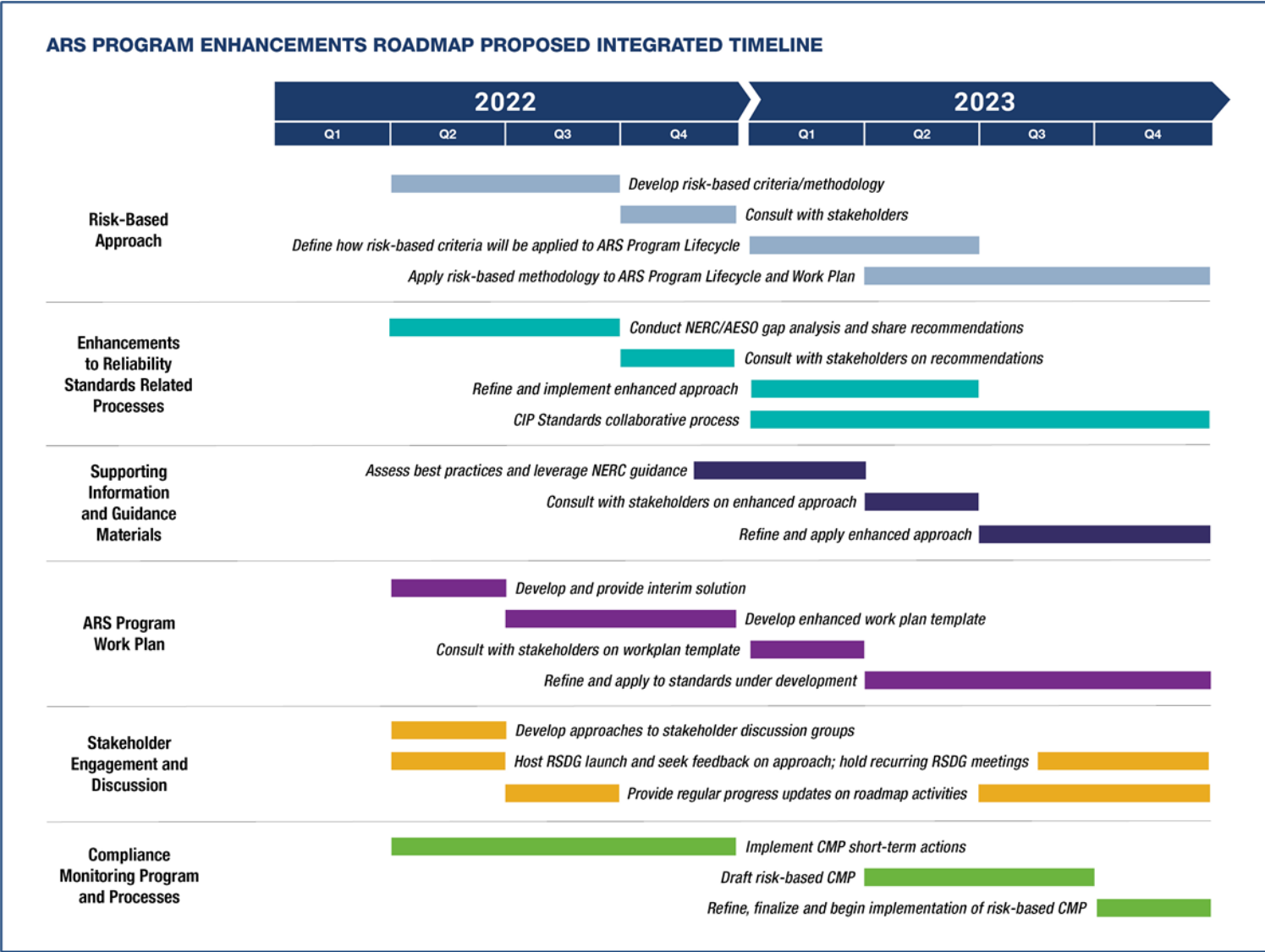
Registrants (as of May 31, 2022)

- AltaLink Management Ltd.
- ATCO Electric
- BBA Engineering
- Best Consulting Solutions Inc.
- Canadian Natural Resources Limited (CNRL)
- Capital Power
- City of Lethbridge
- City of Medicine Hat
- CNOOC International
- Enbridge Power Operations Services Inc.
- Enel Green Power

- ENMAX
- EPCOR
- Grid Subject Matter Experts
- Heartland Generation Ltd.
- Imperial Oil
- Market Surveillance Administrator (MSA)
- METSCO
- NOVA Chemicals Corporation
- NRG Curtailment Solutions
- Suncor Energy Inc.
- TransAlta Corporation
- Utilities Consumer Advocate (UCA)

Session purpose and objectives

- Purpose
  - The purpose of the session is to engage stakeholders in discussions on the AESO's ARS Program

- Session objectives
  - Present and seek feedback on our proposed approach to Reliability Standards Discussion Group (RSDG) and to technical working groups (TWGs)

  - Discuss our interim ARS Program Work Plan

  - Have an open discussion to receive feedback on the ARS Program

Agenda

Time	Agenda Item	Presenter
9:00 – 9:10	Welcome and Introductions • Housekeeping • Agenda	Ping-Kwan Keung
9:10 – 9:40	ARS Program Enhancement Roadmap Activities • RSDG and TWG proposed approaches • ARS Program Interim Work Plan • Q&A	Kathryn Kuber
9:40 – 10:10	Update on Reliability Standards in ARS Program Interim Work Plan • Q&A	
10:10 – 10:55	Reliability Standards Open Industry Discussion	All and facilitated by Ken Gardner
10:55 – 11:00	Next Steps and Session Close-Out	Ping-Kwan Keung

ARS Program Roadmap Activities

ARS Program Enhancements Roadmap Proposed Integrated Timeline

ARS PROGRAM ENHANCEMENTS ROADMAP PROPOSED INTEGRATED TIMELINE

Risk-Based Approach
- Develop risk-based criteria/methodology
- Consult with stakeholders
- Define how risk-based criteria will be applied to ARS Program Lifecycle
- Apply risk-based methodology to ARS Program Lifecycle and Work Plan

Enhancements to Reliability Standards Related Processes
- Conduct NERC/AESO gap analysis and share recommendations
- Consult with stakeholders on recommendations
- Refine and implement enhanced approach
- CIP Standards collaborative process

Supporting Information and Guidance Materials
- Assess best practices and leverage NERC guidance
- Consult with stakeholders on enhanced approach
- Refine and apply enhanced approach

ARS Program Work Plan
- Develop and provide interim solution
- Develop enhanced work plan template
- Consult with stakeholders on workplan template
- Refine and apply to standards under development

Stakeholder Engagement and Discussion
- Develop approaches to stakeholder discussion groups
- Host RSDG launch and seek feedback on approach; hold recurring RSDG meetings
- Provide regular progress updates on roadmap activities

Compliance Monitoring Program and Processes
- Implement CMP short-term actions
- Draft risk-based CMP
- Refine, finalize and begin implementation of risk-based CMP

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RSDG and TWG Proposed Approaches

Structure

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ARC

Alberta Reliability Council ("ARC")

ARC Working Groups

Transmission Operations Coordination Committee ("TOCC")

Real-time Operations Committee ("ROC")

Reliability Standards Discussion Group ("RSDG")

Transmission Data Committee ("TDC")

Telecommunications Work Group

Reliability Standards Technical Working Groups

Proposed Technical Working Group ("TWG") 1: CIP-012-AB-1 Implementation

Proposed TWG 2: IRO-010-4 Development

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RSDG | Proposed approach

- **Purpose**
  - The purpose of the RSDG is to provide an open forum for stakeholders and the AESO to have high-level, non-technical discussions about the ARS Program Lifecycle

- **In-scope**
  - ARS Program Work Plan
  - ARS Program Lifecycle Continuous Improvements
  - Reliability Standards Open Industry Discussion

- **Out-of-scope**
  - Detailed content discussions on specific reliability standards
  - Enforcement-related topics

- **Agenda**
  - Stakeholders may propose additions to the agenda
  - The AESO will consider and endeavour to accommodate these requests where possible

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- **Standing agenda items**

  - ARS Program Work Plan Updates
    - For the AESO to provide an update to stakeholders on reliability standards under development and rationale on prioritization of the reliability standards under development with an opportunity for discussion and feedback

  - ARS Program Lifecycle Continuous Process Improvements
    - For the AESO to update stakeholders on the activities underway to improve ARS Program Lifecycle processes with an opportunity for discussion and feedback

  - Reliability Standards Open Industry Discussion
    - To provide an opportunity for stakeholders and the AESO to discuss specific or proposed reliability standards and provide feedback
    - This discussion may result in:
      - *The AESO posting a new or revised AESO information document or Reliability Standards Audit Worksheets (RSAW)*
      - *The AESO re-evaluating its prioritization of reliability standards under development*
      - *The AESO hosting a technical work group on a topic related to a specific existing or proposed reliability standard or reliability concern*

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RSDG | Proposed approach (cont.)

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- **Target audience**
  - Market participants impacted by reliability standards, including those individuals responsible for:
    - Resourcing a market participant's ARS implementation and compliance activities; and
    - Participating in the AESO's initiatives to improve the ARS Program, including the ARS Program Enhancements Roadmap activities
  - Could be operational, engineering, regulatory or compliance personnel

- **Format**
  - Meeting will be a hybrid format (both in-person and virtual opportunities to participate), provided enough attendees would like to attend in-person, otherwise the meetings will be virtual
  - Meetings will be consultative and informal
  - Discussion is not binding

RSDG | Proposed approach (cont.)

- **Scheduling and intervals**

  – Meetings will be held at regular intervals (propose every four months) and will be advertised on the AESO website and in our AESO Stakeholder Newsletter

- **Meeting material posting plan**

  – All meeting materials will be provided in advance of the RSDG meeting and posted on the AESO website

  – If there is new material to be presented by stakeholders, the AESO will endeavour to post this material on the AESO website before or immediately following the RSDG meeting

- **Recordkeeping**

  – Following the RSDG meeting a discussion summary will be developed and posted on the AESO website

  – RSDG discussion summaries will not be included in the consultation material forwarded to the Alberta Utilities Commission ("Commission") as part of any application requesting approval of a proposed Alberta reliability standard

TWG | Proposed approach

- **Purpose**
  - The purpose of the TWG is to provide an open forum for stakeholders and the AESO to discuss topics related to a specific reliability standard

- **In-scope**
  - Development, implementation and compliance monitoring topics for a specific reliability standard

- **Out-of-scope**
  - Enforcement-related topics

- **Agenda**
  - Stakeholders may propose additions to the agenda
  - The AESO will consider and endeavour to accommodate these requests where possible

TWG | Proposed approach

- **Potential agenda items**

  – Proposed specific reliability standard requirement drafting, risk assessments of each requirement, RSAW drafting, and consultation on a proposed reliability standard, supporting information and guidance materials

  – Specific reliability standard implementation discussions, including education and training, and 360º feedback

  – Specific reliability standard compliance monitoring discussions

- **Target audience**

  – Technical subject matter experts responsible for a market participant's implementation and compliance activities for the reliability standard being discussed

  – Could be operational, engineering, regulatory or compliance personnel

TWG | Proposed Approach (cont.)

- **Format**

  – Meeting will be a hybrid format (both in-person and virtual opportunities to participate), provided enough attendees would like to attend in-person, otherwise the meetings will be virtual

  – Meetings will be consultative and informal

  – Discussion is not binding

- **Scheduling and intervals**

  – Intervals will vary

  – All TWG scheduled meetings will be advertised on the AESO website and in our AESO Stakeholder Newsletter

- **Meeting material posting plan**

  - All meeting materials will be provided in advance of TWG meetings and posted on the AESO website

  - If there is new material to be presented by stakeholders, the AESO will endeavour to post this material on the AESO website before or immediately following the TWG meeting

- **Recordkeeping**

  - Following a TWG meeting, a discussion summary will be developed and posted on the AESO website

  - Following a TWG meeting on standards under development for discussions related to reliability standards requirements, an appropriate record of the meeting will be developed and posted on the AESO's website and will be included in the consultation material forwarded to the Commission as part of any application requesting approval of a proposed Alberta reliability standard

ARS Program Interim Work Plan

ARS Program Interim Work Plan

- **Update intervals**
  - Moving forward the ARS Program Interim Work Plan will be updated prior to the RSDG meeting

- **Rationale for prioritization**
  - At RSDG, the AESO will provide rationale for all new additions and changes to the ARS Program Work Plan

- **Current timelines**
  - The AESO has provided best estimates for dates and date range, that involve stakeholders, for all standards under development

- **Piloting new approach to timelines with IRO-010**
  - Plan is to use a TWG to work with stakeholders to assess the work required to develop and implement IRO-010-AB-4
  - The AESO will consider feedback from the TWG meeting to create
    - IRO-010-AB-4 development timeline; and
    - AESO's first draft proposed IRO-010-AB-4 for discussion

Update on Reliability Standards in ARS Program Interim Work Plan

ARS Program Interim Work Plan

Status	Project No.	Alberta Reliability Standard		Type	Applicability	AESO Consultation Process	AUC Process	Effective Date / Inactive Date*	Background Material
		Standard No.	Standard Name						
Approved		PER-006-AB-1	Specific Training for Personnel	New	Market Participant	Q4 2020 to Q1 2021	Q1 2021 to Q2 2022	Q3 2023	PER-006 Specific Training for Personnel
		PRC-018-AB-1	Disturbance Monitoring Equipment Installation and Data Reporting	Retire	ISO and Market Participant	Q3 2018 to Q4 2018	Q4 2018	Q3 2025	Implementation Plan included in Appendix 2 of PRC-002-AB-2
		PRC-025-AB-2	Generator Relay Loadability	New	Market Participant	Q1 2019 to Q2 2019	Q2 2019 to Q3 2019	Q4 2024	PRC-025 Generator Load Reliability
Forwarded to the AUC		CIP-012-AB-1	Cyber Security – Communications between Control Centres	New	ISO and Market Participant	Q4 2021 to Q2 2022	Q2 2022	Proposed ISO: Q3 2022 Proposed MP: Q3 2023	Proposed New Alberta Reliability Standard CIP-012-AB-1, Cyber Security - Communications between Control Centres
Under Development		COM-001-AB-3	Communications	New Version	ISO and Market Participant	Q1 2018 to (estimate) Q4 2022 / Q1 2023	Estimate: Q4 2022 / Q1 2023	Estimate: Q4 2023 or Q1 2024	Proposed New COM-001-AB-3, New COM-002-AB-4, Retirement of Existing COM-002-AB1-2a and COM-001-AB1-1.1
		COM-001-AB1-1.1	Telecommunications	Retire	ISO and Market Participant			Estimate: Q3 2023 or Q4 2023	
		COM-002-AB-4	Operating Personnel Communications Protocols	New Version	ISO and Market Participant			Estimate: Q4 2023 or Q1 2024	
		COM-002-AB1-2a	Communications and Coordination	Retire	ISO and Market Participant			Estimate: Q3 2023 or Q4 2023	
		EOP-005-AB-3	System Restoration from Blackstart Resources	New Version	ISO and Market Participant	Q2 2022 to (estimate) Q2 / Q3 2022	Estimate: Q3 / Q4 2022	Estimate: Q4 2023 or Q1 2024	Proposed New EOP-005-AB-3 & EOP-006-AB-3, Retirement of Existing EOP-005-AB-2 & EOP-006-AB-2
		EOP-005-AB-2	System Restoration from Blackstart Resources	Retire	ISO and Market Participant			Estimate: Q3 2023 or Q4 2023	

Reliability Standards Open Industry Discussion

Reliability Standards Open Discussion

- Suggested topic areas

  - Reliability standards under development

  - Reliability standards implementation

  - Reliability standards that are in effect

Next Steps and Session Close-Out

Session close-out

- We want to thank you for attending the RSDG and we would appreciate your feedback on the session

- Launch poll

  - The purpose of the session was clear

  - The information was presented in a clear manner

  - The presentation content was clear and informative

  - I found this session valuable

Request for feedback

- We invite all interested stakeholders to provide their input on the AESO's proposed approach to RSDG and TWG and the ARS Program Interim Work Plan via the questions set out in the **Stakeholder Comment Matrix RSDG June on or before June 29, 2022**. The comment matrix is available on our website at www.aeso.ca

  – Path: Rules, Standards and Tariff > Alberta Reliability Standards > ARS Program Enhancements > RSDG Launch | June 8, 2022

Contact the AESO

- *Twitter:* *@theAESO*
- *Email:* *stakeholder.relations @aeso.ca*
- *Website:* *www.aeso.ca*
- Subscribe to our stakeholder newsletter

Thank you