12-Month Rolling Timeline for Energy Storage Roadmap Integration Activities

Classification	ES Roadmap Integration Activities	2021 Q2			2021 Q3			2021 Q4			2022 Q1		
		A	M	J	J	A	S	O	N	D	J	F	M
Education and Awareness	**ES Progress Updates – UPDATED** Share progress on the Energy Storage (ES) Roadmap integration activities, interrelated initiatives and 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
Phase 2 Long-term Implementation	**ISO Tariff Design – RESUMED** Work in concert with ISO tariff design to ensure ES is considered.	Progress will align with Bulk and Regional Tariff Design											
	Forecasting, Planning and Market Reports* Develop and implement forecasting and planning models to support Long-term Outlook (LTO) and Long-term Transmission Plan (LTP).	C		I, E (only pertaining to AESO internal changes) *These work streams provided input on potential ISO rule changes to enable storage and will continue to provide support to the single ISO rule changes process as required.*									
	Configuration, Qualification and Connection Requirements* Develop appropriate functional specification documents; identify market participation options, permissible configurations, and metering requirements for ES.	C											
	Market Participation* Evaluate long-term options for energy storage participation in the Energy and Ancillary Service markets.	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.	C											
	ISO Rule Changes Based on the work performed by the different cross-functional teams, the AESO will conduct a single consultation process under AUC rule 017 to develop and file the proposed	Progress and information will be provided as part of the Energy Storage Rule Amendments process											

ES integration process phases: Analysis (A), Conception (C), Development (D), Regulatory (R), Implementation (I), Engagement (E)