

FOUNDATION WORKING GROUP SESSION # 1

Project Plan Overview

April 22, 2015



Background

- Ontario has made a significant investment in smart meters and in the central repository (the MDM/R) for high quality, consistent residential and small commercial electricity consumption data. This repository is currently being used by LDCs in the processing and management of smart meter data to support billing of electricity customers on time-of-use rates and in fulfilling other LDC regulated obligations.
- The IESO as the Smart Metering Entity has the obligation “To provide and promote non-discriminatory access, on appropriate terms and subject to any conditions in its licence relating to the protection of privacy, by distributors, retailers, the IESO and other persons”
- The IESO has the authority to collect information on the metering of consumers’ consumption and related data.
- The IESO is able to use smart metering data and related information to fulfill its regulated obligations.

Mandate

The *Electricity Act, 1998* specifies the mandate of the Independent Electricity System Operator (IESO). The *Electricity Act* includes, but is not limited to, the following objects:

- to direct the operation and maintain the reliability of the IESO-controlled grid, and operate the IESO-administered markets;
- to develop, establish and enforce criteria and standards relating to the reliability of the integrated power system and work with others outside Ontario to co-ordinate IESO activities;
- to procure electricity and engage in activities that support an adequate, reliable and secure electricity supply;
- to forecast electricity demand (short, medium and long-term) and conduct planning for electricity generation, demand management, conservation and transmission;
- to support and facilitate the production of energy from different sources, including clean energy sources;
- to engage in activities that facilitate load management and promote electricity conservation;
- to collect and make public information relating to the short term, medium term and long term electricity needs of Ontario and the adequacy and reliability of the integrated power system to meet those needs.

Mandate (cont'd)

- The **Smart Metering Entity (SME)** was established under *Energy Conservation Leadership Act, 2006*, which amended the *Electricity Act, 1998* to create the SME (s. 53.7) and establish its objects (s. 53.8) which include, among other things:
 - the collection, management and storage of metering data related to consumers' consumption or use of electricity in Ontario;
 - to provide and promote non-discriminatory access, on appropriate terms and subject to any privacy conditions in its license, access to such metering data
- The Independent Electricity System Operator (IESO) was subsequently designated as the SME by Ontario Regulation 393/07, as amended. That regulation also sets out certain required activities and exclusive authority of the SME.
- The IESO is currently operating as the SME under licence by the OEB, with the current licence expiring January 26, 2016.

Foundation Project: Objectives

The data set in MDM/R offers significant potential value for designing conservation and demand response programs, system planning, policy development, academic research and to support innovation in Ontario.

Capturing that potential value will involve two requirements:

- Defining the information required to be associated with electricity consumption information (such as geo-location) to enable analysis of this information;
- The development of rules and protocols for data access to meter data from the MDM/R and the MDM/R Data Mart by third parties, and builds in the necessary measures to ensure the security and privacy of the data.

Foundation Project: Scope

Included in the scope of the Foundation project are the following efforts:

- Communicating the objectives of the project to government, OEB, IPC, LDCs, potential data users, and interested stakeholders.
- Developing and stakeholdering of the required information to be associated with MDM/R electricity consumption data for relating it to other data sources to support analysis by LDCs, the IESO and other stakeholders.
- Considering the implementation of the additional information into the MDM/R and, if so:
 - Planning for the implementation of the interface specifications and data requirements.
 - Supporting LDC implementation and compliance with the interface specifications and data requirements.
- Developing, stakeholdering, and implementing the rules for data access by third parties that preserves the security and privacy of personal data that would be accessible

Foundation Project: Areas Not in Scope

Excluded from the scope of the Foundation project are:

- All of the activities required by LDCs to send required data according to the MDM/R Technical Interface Specifications and at the required level of quality.
- Development and implementation of new automated or online systems and interfaces to support access to data by third parties, which is in scope of the MDM/R Data Access Platform business case (i.e. only the current existing MDM/R and MDM/R Data Mart data access interfaces and capabilities will be used for the Foundation implementation).
- Additional data sets to the MDM/R or MDM/R Data Mart (e.g. commercial and industrial consumption data, property information), which are in the scope of the MDM/R Data Access Platform business case.

Foundation Project: Steering Committee

- Foundation Project Steering Committee
 - Terry Young (Senior Executive, Project Sponsor)
 - Doug Thomas (Senior Executive)
 - Przemek Tomczak (Co-chair)
 - Julia McNally (Co-chair)

Foundation Project: High Level Schedule

Work Stream	Activities	Feb	March	April	May	June	July	August	September	October
Foundation Project Initiation										
	Internal Project Planning and Launch									
	External Project Launch with Key Stakeholders									
Stakeholdering & Communications										
	Stakeholder Engagement Plan									
	Establish Foundation Working Group									
	Periodic Website Postings of Foundation Project Progress									
	Post Preliminary Foundation Recommendations for Comment to Website									
	Post Final Foundation Recommendations to Website									
	Plenary Stakeholder Meeting to Present Final Recommendations									
Foundation Project Team Activities										
	Research and Investigative Activities									
	Prep and Support of FWG									
Joint FWG/Project Team Activities										
	Foundation Working Group Meetings									
	Formulate & Finalize Recommendations									

Note: For discussion purposes only

Foundation Project: Major Work Streams

- Stakeholdering and Communications
- Geo-location and Customer Identification Information
- Security, Privacy and Rules for Data Access by Third Parties
- Cost Recovery

Stakeholdering and Communications

Stakeholdering and Communications: Activities (1)

- Development and implementation of Stakeholder Engagement Plan
 - Plan outlines how stakeholders can participate in this initiative and areas for which the IESO is seeking input
 - Strategy and Plan to achieve project transparency, accountability to project sponsor, and support of LDCs and potential users
 - Foundation project rollout/introduction
- Broad based communications mechanisms/channels
 - IESO and SME websites
 - Teleconferences/Webinars
 - All hands plenary session

Stakeholdering and Communications: Activities (2)

- Establish Foundation Working Group (FWG)
 - Members selected and announced
 - Tentative dates for FWG meetings
 - April 22nd
 - May 20th
 - June 17th
 - July 22nd
 - September 2nd
- Broader stakeholder engagement will be integrated with FWG
 - Alternate between WG-only and public sessions
 - Encourage feedback and discussion to inform proposals and recommendations

- 1) Geo-location and Customer Identification Information
- 2) Privacy, Security and Third Party Access
- 3) Cost Recovery
(will all be covered in the afternoon presentations)

Questions?