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September 25, 2015

A Note from Patrick Bateman, CanSIA Director of Market Intelligence & Research



Good morning,

This week I addressed a standing-room only audience of 180 solar energy professionals and advocates in Edmonton, Alberta after a day of meetings with policy-makers.

I started by saying that if I could leave only one thought with them, it would be that: Alberta's electricity sector is on the cusp of a major paradigm shift; that the resultant economic, environmental and social opportunities are colossal and that the political leadership needed to enact this change cannot be

underestimated. If they support this change - they should make their voices heard.

I told them that although today Alberta has an average national deployment rate for solar (when Ontario is excluded), that this should be viewed as a measure of the province's future potential and not as a "slow-start". I told them that when Alberta surpasses 100 MW of installed capacity, that will equate to the current global average of 25 watts per capita and that that will be the thinnest edge of wedge for what is to come.

CanSIA and CanWEA are working to finalize our joint proposal to the Government of Alberta which will detail a Renewable Portfolio Standard (RPS) and a Standing Offer Program (SOP). The RPS will send the long-term market signals to industry that an increasing proportion of the province's electricity-mix will be delivered by renewable energy sources. It will also create the

framework to make that a reality. The SOP will enable small-scale renewables to begin to play a more meaningful role in the province and bring their unique system, siting and ownership benefits to the province.

It is anticipated that in 7 - 9 weeks, Premier Notley will announce the level of ambition that the province will proceed with under her leadership. CanSIA is working to ensure a meaningful future role for solar in the province. I hope you enjoy my presentation from the seminar entitled "[Alberta's Solar Future: Industry Status, Market Obstacles and Policy Proposal](#)". Stay tuned for further information on policy development in Alberta.

Please read on for some other policy, regulatory and market updates from the CanSIA Executive Team:

Policy & Market Development:

1. [CanSIA & CanWEA Working to Develop Common Policy Recommendations in Alberta](#)
2. [Ontario's 2016 Price Review and FIT 4 Application Period](#)
3. [Exploring the Opportunities for Renewable Energy in New Brunswick](#)
4. [Final Proposals Submitted to Ontario's Large Renewable Procurement \(LRP\)](#)
5. [Sunny Times Ahead for Saskatchewan?](#)

Utilities & Regulatory Affairs:

1. [CanSIA Visits SaskPower to Discuss Utility-Scale Competitive Procurement](#)
2. [Ontario Ministry of Energy's Net Metering/Self-Consumption Advisory Working Group](#)
3. [Powerstream Launches Solar Plus Storage Pilot Project](#)

Kindest regards,

Patrick Bateman
CanSIA, Director of Market Intelligence & Research

Policy & Market Development

CanSIA & CanWEA Working to Develop Common Policy Recommendations in Alberta

Premier Notley re-affirmed her commitment to diversifying Alberta's economy and accelerating the phase-out of the province's coal-fleet during an [interview with CBC Radio](#) this week.



CanSIA and CanWEA continue to collaborate to advocate for a common set of renewable electricity policies which will be detailed in a submission to Alberta's "Leach Panel" at the end of the month. While in draft form at present, the policies are likely to include broadened Carbon Price application and incremental increases in price over time, a [Renewable Portfolio Standard \(RPS\) with a "Solar Carve-Out"](#); and a [Standing Offer Program \(SOP\) for distribution-connected solar](#).

Solar West 2015 is now less than two weeks away, it sold-out last year so register early to avoid disappointment and to learn about how Alberta's renewable energy market will evolve in the coming months and years.

Ontario's 2016 Price Review and FIT 4 Application Period

On September 17, 2015 the IESO posted the [2016 FIT and microFIT Price Schedule](#) as well as [slight revisions](#) to the FIT 4 Program documents intended to clarify areas of confusion identified by stakeholders. (Consult the [FIT Website](#) for full details).

Price Review: CanSIA's analysis, included in our [Price Review Submission](#), demonstrates that current project costs in Ontario do not warrant reductions to the previously posted Price Schedule and that any potential cost savings should be delivered through the use of the new [Contract Price Reduction Priority Point mechanism](#). CanSIA has finalized our [response to the newly posted Price Schedule](#) which has been submitted to the IESO and the Ministry of Energy. Within this response CanSIA highlights Ontario market realities that must be taken account of when setting prices as well as focuses on several recommendations for programmatic changes which must be made in order to allow the industry to meet the aggressive new prices.

FIT 4 Application Period: The FIT 4 Application Period is scheduled to run from October 5 - October 25, 2015. The IESO has also informed stakeholders that the online Application Form will be available on September 24, 2015 for Applicants to create and save draft Applications that can be submitted when the Application Period opens. Any currently saved drafts will be deleted, however, so Applicants should wait until the form becomes available on September 24, 2015 to create and save any new drafts.

Renewable Energy Opportunities in New Brunswick in 2016

The opportunities for renewable energy vary from province to province as do the policies and programs in which project developers need to operate. New Brunswick has a Large Industrial Renewable Energy Purchase Program, (LIREPP), a Locally Owned Renewable Energy from Small Scale Program (LORESS) and embedded and distributed generation programs which continue to evolve. Heather Quinn, Director of Energy at the Government of New Brunswick recently discussed these programs with participants in CanSIA's Campaign to Open Canadian Markets (OCM). [Ms Quinn's presentation provided excellent background on the province's energy infrastructure and policy frameworks](#).

Final Proposals Submitted to Ontario's Large Renewable Procurement (LRP)



Registered Proponents for the IESO's LRP I RFP process have now submitted their Proposals for evaluation and possible contract award. On September 10, 2015 the IESO posted an [update to the list of Registered Proponents](#) to indicate which Proposals had actually been submitted by the September 1, 2015 deadline.

Registered Proponents ended up not submitting Proposals for 12 Non-Rooftop Solar projects for approximately 189.5 MW. Proposals for 60 Non-Rooftop Solar projects for approximately 1,538 MW were submitted, however, leaving the Solar Procurement Target oversubscribed by a factor of roughly 10. CanSIA expects there will still be strong competition amongst solar proponents for the limited 140 MW Solar Procurement Target. Beyond bid price and Rated Criteria Points, available connection capacity is expected to play a large role in determining which Proposals are selected for contracts.

The IESO is now reviewing all submitted Proposals and expects to announce successful proponents/projects in December 2015.

Sunny Times Ahead for Saskatchewan?



As neighbouring Alberta considers how to increase the role of solar energy in their supply-mix and economy, elected officials and political hopefuls in Saskatchewan are preparing for a spring election. Earlier this month, CanSIA paid a visit to the Legislature in Regina to make the case for solar energy becoming an important consideration for the province. Learn more about [Saskatchewan's economic and political climate](#) and [utility SaskPower](#).

CanSIA Visits SaskPower to Discuss Utility-Scale Competitive Procurement

The SaskPower offices in Regina played host to representatives of ten solar developers (participants in CanSIA's Campaign to Open Canadian Markets) in September for a roundtable discussion which ranged from best practices for



utility-scale site selection to competitive procurement design. The discussion led toward a conclusion that with Saskatchewan's solar resource and an efficiently designed and managed competitive procurement, the province could achieve the lowest-priced utility-scale solar in Canada's history. To learn more about the discussion on competitive procurement design, [read the slide deck that guided part of the discussion](#).

Ontario Ministry of Energy's Net Metering/Self-Consumption Advisory Working Group

On August 27, 2015 Ontario's Ministry of Energy's Net Metering/Self-Consumption Advisory Working Group briefed stakeholders on their [policy proposal](#) regarding the transition from the current microFIT Program to a net metering based mechanism in the 2017-2018 timeframe ([webinar](#), [slides](#), [backgrounder on Value of Solar Tariffs](#)).

Written feedback on the policy proposal is being accepted which must be submitted to feedback.to.cee@ontario.ca no later than October 16, 2015. CanSIA is currently developing our submission into this process with the help of the Distributed Generation Task Force (DGTF).

Following the conclusion of public consultation, the Ministry will develop a more detailed proposal that will be posted on the Environment Bill of Rights registry for public comment in early 2016. The proposal will include details in respect of program design, governance, administration, as well as legislation or regulation amendments that are required to implement the new program.

CanSIA's participation on the Ministry of Energy's Advisory Task Force presents a valuable opportunity to ensure that the industry's perspective on these developments is heard during the policy development process.



PowerStream Launches Solar Plus Storage Pilot Project

On September 14, 2015 PowerStream announced the commencement of a new [solar plus storage pilot project](#) for 20 customers within their service territory. [PowerStream](#), a municipally owned Ontario Local Distribution Company (LDC) serving

more than 350,000 customers, has launched this pilot with funding support from the [Independent Electricity System Operator \(IESO\)'s Conservation Fund](#).

The pilot will include the installation of 20 solar plus storage systems, each comprised of a 5 kW solar array, 11.4 kWh lithium-ion battery, 6.8 kW inverter, a bi-directional meter and remote access to an energy management system that will allow them to monitor the system at their convenience. This project is an important milestone for the solar industry in Ontario as LDCs start to become more comfortable with the business case, as well as the benefits to the distribution system, for solar plus storage assets.

PowerStream has signalled that they are currently finalizing the details of the project and the offer that would be made to the 20 participants, however, offers will be made to participants in the next few weeks.

Stories We Are Following

- [Hundreds turn up for Alberta's 1st climate change forum](#)
- [ENERGY DARWINISM II: Why a Low Carbon Future Doesn't Have to Cost the Earth](#)
- [Ontario Climate Change Lab: Solutions for Ontario's Climate Challenge](#)
- [Canada needs a single price on carbon](#)
- [From solar panels to gardens, citizens share climate change ideas](#)
- [Pre-Production Begins On Documentary Feature Film "Solar, A Convenient Truth!" Scheduled To Begin Filming Fall 2015](#)
- [Rules laid out for small scale renewable energy projects](#)
- [A Modern Grid: There is no one-size-fits-all solution](#)
- [Solar panels help Devon become new kind of energy town](#)
- [The Sunniest Climate-Change Story You've Ever Read](#)
- [Four good reasons for community microgrids](#)

[Join CanSIA](#) as a member to increase your access to policy forums, working groups, market research and policy advocacy events.

Contact Lisa Hatina (lhatina@cansia.ca), Business Development and Member Relations Manager to learn more about the significant opportunities and benefits that CanSIA members receive, can participate in and support in our three core service areas:

- Policy and Advocacy;
- Industry Capacity Development; and,
- Profile Building and Networking.





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