RETAIL ENERGY CODE

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|---|---|
| 01 | Initial Assessment Report |
| 02 | Preliminary Change |
| 03 | Final Change Report |

# FINAL CHANGE REPORT

## R0066 – INCLUSION OF SMRS DATA ITEMS IN EES (BSC CP1568 CONSEQUENTIAL CHANGE)

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| CHANGE REPORT | FINAL |
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| RESPONSIBLE COMMITTEE | CHANGE PANEL | CHANGE PATH | SELF GOVERNANCE |
| PRIORITY STATUS | HIGH | URGENCY | STANDARD |

| | |
|---|---|
| DEADLINE FOR ALTERNATIVE CHANGE PROPOSALS | 04/11/2022 |


**LEAD CHANGE ANALYST**



**Gemma Dixon**

Click to send an email

020 3890 9062



**TECHNICAL LEAD**

**Michael Taylor**

Click to send an email


## CHANGE OVERVIEW

This Change Proposal seeks to display new Balancing and Settlement Code (BSC) owned Data Items in the Electricity Enquiry Service (EES). These Data Items support the introduction of Registration Service Data Items that will be needed before Market-wide Half Hourly Settlement (MHHS) migration commences.

| | |
|---|---|
| | High Impact:<br>ERDS Providers |
| | Medium Impact:<br>Electricity Enquiry Service Users |
| | Low Impact:<br>N/A |

## RESPONSIBLE COMMITTEE DECISION

On the 20 December 2022 the Change Panel voted unanimously to **APPROVE** Change Proposal R0066 for implementation on 30 June 2023.

RETAIL ENERGY CODE

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# BACKGROUND

## 1 SUMMARY

Following a recommendation made by the Code Change and Development Group (CCDG) Balancing and Settlement Code CP1558 'New Registration data items to facilitate MHHS' was raised. The change will enable new Registration Data Items and process changes to support the Market-wide Half Hourly Settlement (MHHS) transition. It will introduce a subset of items into the existing Supplier Meter Registration Service (SMRS) systems, before MHHS migration.

The BSC Data Items are proposed for introduction into the daily bulk transfer from Electricity Retail Data Service (ERDS) into the Electricity Enquiry Service (EES). BSC CP1558 was approved for implementation on 29 June 2023, by the Supplier Volume Allocation Group (SVG) at its meeting on 5 July 2022.

REC Change Proposal, R0032 was originally planned as the vehicle to introduce the REC elements of the BSC change (i.e., the transfer of the data into EES) alongside further REC changes.

Following SVG approval, the BSC identified a gap in BSC CP1558. The Data Items were never defined in the BSC CP and therefore couldn't be included in the EES solution for R0032. The BSC subsequently raised a new Change Proposal BSC CP1568 Inclusion of new LDSO-mastered SMRS data items, to define these new Data Items and to include them into the EMAR Data Specification.

R0066 was therefore raised to deliver the mechanism to display these Data Items in EES.

New Data Items:

- Associated Import / Export MSID
- Connection Type
- Connection Type Effective From Date (EFD)
- Connection Type Effective To Date (ETD)
- Associated Import / Export MSID EFD
- Associated Import / Export MSID ETD

Existing Data Items:

- Direction of Energy Flow

## 2 PROBLEM STATEMENT

BSC CP1558 and CP1568 have been approved for implementation on the 29 June 2023. The BSC CPs introduce Registration Service Data Items that are critical to the MHHS rules and processes. These need to be introduced into the existing Supplier Meter Registration Service (SMRS) system and displayed in EES prior to the transition to Half Hourly (HH) Settlement. This is a consequential Change Proposal to deliver the REC elements.

## 3 USER STORIES

| REF. | USER STORIES |
|---|---|
| **MARKET PARTICIPANT USER STORIES** | |
| M1 | As an impacted Market Participant, I want to ensure good quality underlying data is available to support the transition to HH Settlements to avoid additional time and effort being spent fixing data quality issues during the migration period. |
| M2 | As the MHHS Programme, I want Registration Service Data Items to be available ahead of the MHHS migration to enable data cleanse activity to be completed to address data quality issues. |

# PROPOSAL

## 4 SUMMARY OF ANALYSIS UNDERTAKEN

Analysis of the issue was completed in conjunction with the BSC and validated the requirement to introduce new Data Items into the daily bulk transfer from ERDS to EES and for the new Data Items to be displayed in EES.

## 5 PROPOSED SOLUTION

The solution includes the addition of seven Data Items, which will be added to the daily bulk transfer from ERDS to EES and made available in both the EES Graphic User Interface (GUI) and API. The proposed solution is summarised below and supplemented by the new Data Items and Requirements Specification.

The proposed solution will require:

- The **additional Data Items** include:
    1. **Connection Type –** The type of physical connection for a metered supply
        - This will be an enumerated item, with the following values:
            - E - EHV Current Transformer
            - H - HV Current Transformer
            - L - LV Current Transformer
            - W - Whole Current
            - U - Unmetered
    2. **Connection Type EFD** – The Effective From Date for a Connection Type
    3. **Connection Type ETD** - The Effective To Date for a Connection Type
    4. **Associated Import / Export MSID** - Creates a relationship between the Import MSID and the Export MSID at a site to identify where common processes are needed for both Metering Systems

5. **Associated Import / Export MSID EFD -** The Effective From Date for an Associated Import / Export MSID
6. **Associated Import / Export MSID ETD -** The Effective To Date for an Associated Import / Export MSID
7. **Direction of Energy Flow** – An existing data item (DI05337/J0727) indicating the direction of 'Active' power flow (i.e., whether the energy flow is import or export). Energy consumption is (Active) Import or Embedded Exempt Generation is (Active) Export.

- **Data Items to be made available in EES:** All seven Data Items are to be made available in the EES, both in the API and GUID.
- **Data Access Matrix (DAM) Update:** Data Items will be added to the Electricity Data Access Matrix

## 6 DRAFT LEGAL TEXT

The legal text changes to deliver the proposed solution to R0066 can be found here.

## 7 SUMMARY OF IMPACT ASSESSMENT ACTIVITY

### 7.1 SERVICE PROVIDER IMPACT ASSESSMENTS

The EES Provider and the ERDS Provider were asked to impact assess the proposed solution. The following table summarises the costs provided for design, build and implementation.

| | |
|---|---|
| **SERVICE PROVIDER COSTS** | • £24,930 |

There are no ERDS costs for the development and implementation of R0066 as all ERDS related costs are associated with the design, development, and implementation of BSC CP1558.

The EES Provider noted that Change Proposal R0066 should be implemented at the same time as Change Proposal R0032, to reduce duplication of effort.

| | |
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| **ERDS PROVIDERS** | • The Code Manager received a total of six responses from ERDS Providers, which were broadly not supportive of the progression of Change Proposal R0066. The reasons stated for not progressing the Change Proposal centred on the lack of clearly stated benefits on early data migration from the MHHS Programme. No costs were included in the ERDS Provider assessments, as they have been accounted for under BSC CP1558 and CP1568. |

## 8 DELIVERY AGAINST CHANGE PROPOSAL PLAN

To date all activity has been completed within the planned timescales.

The Change Proposal Plan can be found here.

## 9 KEY RISKS, ASSUMPTIONS, ISSUES AND DEPENDENCIES

### 9.1 RISKS AND ISSUES

| NO. | RISK | NOTES | MITIGATION |
|---|---|---|---|
| **R1** | Current lack of MHHS migration/data cleanse plan may result in a lack of confidence in the need for this Change Proposal at this time. | BSC is the lead code and is targeting June 2023 implementation – BSC CP1568 was approved at SVG on 06 December 2022. The Code Manager has shared the concerns provided in the Impact Assessment responses with the BSC and MHHS Programme. | Any Data Cleanse activity for these data items will be determined/agreed between BSC and the MHHS Programme. |

### 9.2 ASSUMPTIONS AND DEPENDENCIES

| NO. | ASSUMPTION | NOTES | HOW/WHEN TO VALIDATE |
|---|---|---|---|
| **A1** | Change Proposal R0066 can be delivered as part of the same work package and included in the same release as R0032 and R0010, without creating any significant risk. | | **Closed** - Validated through Service Provider Impact Assessment. |
| **A2** | The design of the seven Data Items provided by the BSC will not change. | | **Closed** - Design has been locked down as BSC CP1568 was approved by SVG on 06 December 2022. |
| **A3** | Amendments to Data Item formats because of MHHS, such as moving DateTime to high resolution, will be picked up in a consequential MHHS change. | | **Closed** - Validated with MHHSP that any dates introduced as part of transitional changes will be in the current standard format. |

| | | | |
|---|---|---|---|
| **A4** | Any data cleanse activity will be defined and agreed between BSC and the MHHS Programme. | R0066 is delivering consequential REC changes with BSC being the lead code. Any decisions on data cleanse activity are to be determined by BSC. | This has been validated through discussions with BSC and MHHSP. |

## 10 PROPOSED IMPLEMENTATION DATE AND APPROACH

| | | | |
|---|---|---|---|
| **PROPOSED IMPLEMENTATION DATE** | 30/06/2023 | **PROPOSED IMPLEMENTATION APPROACH** | BIG BANG |

BSC CP1558 and CP1568 have been approved for implementation on the 29 June 2023. It is acknowledged that the BSC changes have been approved for one Working Day prior to the proposed implementation date of the REC change. This will be managed as part of the Release Management activity and a cutover plan is being developed between the REC and BSC.

The REC and BSC changes collectively deliver the CCDG's transition recommendation, therefore the implementation of this REC Change Proposal is required to align with the implementation of BSC CP1558/68 in the June 2023 release, to give full effect to the changes required by MHHS.

## 11 SUMMARY OF CONSULTATION RESPONSES

A consultation was circulated on 04 November 2022 to obtain views on the Preliminary Change report. In total five responses were received from Energy Suppliers and Distribution Network Operators. The key themes from these responses have been summarised and set out below.

### 11.1 SUMMARY OF RESPONSES

#### 11.1.1 COMMENTS ON THE SOLUTION AND LEGAL TEXT

One Party highlighted that this Change Proposal contained additional Data Items to that presented in the BSC Change Report for CP1568 and therefore did not agree with the proposed solution. After discussion with Elexon, the solution documentation for CP1568 now reflects the two additional Data Items, in their publication dated 29 November 2022.

One respondent requested further clarity on how the new Data Items will be presented in the EES API and their conditionality for industry parties.

Two respondents agreed with the proposed solution.

### 11.1.2 IMPLEMENTATION APPROACH AND DATE

Two respondents agreed with the proposed implementation approach and date of 30 June 2023.

One respondent raised a concern that the BSC CP changes have a go live date of Thursday 29 June 2023 with the REC change proposed to go live the next Working Day.

One Party raised a concern that this solution is being progressed to implementation while the MHHS re-plan is still underway.

## 12 SUMMARY OF AMENDMENTS MADE FOLLOWING CONSULTATION

| DOCUMENT | SECTION | AMENDMENT | REASON |
|---|---|---|---|
| Final Change Report | 10 - Proposed implementation date and approach | Corrected proposed implementation date from 30/06/2022 to 30/06/2023. | Incorrect year within the proposed implementation date. |
| Final Change Report | 1 – Summary<br>2 Problem Statement<br>9 – (R1) Key risks assumptions, issues, and dependencies<br>10 – Proposed implementation date and approach | Updates to reflect the SVG decision on BSC CP1568 on 06/12/22 | To reflect the most up to date position of the lead code change. |

# 13 BUSINESS CASE ASSESSMENT

## 13.1 COSTS

| | TOTAL COSTS |
|---|---|
| SERVICE PROVIDERS | £24,930 |

## 13.2 BENEFITS

| INTANGIBLE BENEFITS | BENEFITS DESCRIPTION |
|---|---|
| DATA QUALITY | The implementation of R0066 with BSC CP1558/68, enables the industry to prepare for MHHS, with good quality underlying data to support the transition to HH Settlements. It will avoid additional time and effort being spent fixing data quality issues during the migration period. |
| CROSS CODE | Following SVG approval of BSC CP 1568 on 06 December 2022, the delivery of R0066 with BSC CP1558/68, enables the full solution to be delivered. |

## 13.3 COST BENEFIT ANALYIS SUMMARY

This Change Proposal has been raised to implement the consequential changes required to align with the BSC solution, which has already been approved for implementation on 29 June 2023.

Failure to implement these changes would result in these Data Items not being available on the EES, and therefore not be available for use by MHHS. We consider that the business case made by the BSC is also relevant to this Change Proposal.

# 14 CASE FOR CHANGE

## 14.1 SELF-GOVERNANCE

The Code Manager considers that there is a case for change to implement this Change Proposal, on the basis that:

- The proposed solution resolves the problem statement.
- A positive business case can be made, as set out in section 13 of this report.

- Given the importance of the MHHS Programme, the early introduction of these key registration items will allow a sufficiently long period of data cleanse, which in turn will significantly de-risk the migration activities.
- This Change Proposal is a consequential change of BSC CP1558 which has already been approved, therefore if R0066 is not approved, the full solution cannot be delivered.

## 15 CODE MANAGER'S RECOMMENDATION

Based on the evidence in sections 13 and 14 of this report, the Code Manager considers a positive business case can be made and recommends that the Change Panel:

- **APPROVE** the proposed change solution;
- **APPROVE** the proposed implementation approach; and
- **APPROVE** the proposed implementation date of 30 June 2023

## 16 RESPONSIBLE COMMITTEE DECISION

This report was discussed at the REC Change Panel meeting on 20 December 2022.

The REC Change Panel voted to:

- **APPROVE** the proposed change solution;
- **APPROVE** the proposed implementation approach; and
- **APPROVE** the proposed implementation date of 30 June 2023.

## 17 APPENDIX

| | |
|---|---|
| **CHANGE PROPOSAL** | R0066 – Inclusion of SMRS Data Items in EES (BSC CP1568 Consequential Change) |
| **LEGAL DRAFTING** | Link |
| **CONSOLIDATED IMPACT ASSESSMENT RESPONSES** | Link |
| **CONSOLIDATED CONSULTATION RESPONSES** | Link |
| **RELATED CHANGE(S)** | BSC CP1568 Inclusion of new LDSO-mastered SMRS data items |

## 18 GLOSSARY

| TERM | DEFINITION |
|---|---|
| Retail Energy Code (REC) | means this Code, including its Schedules and the Technical Specification, maintained pursuant to the electricity supply licences granted under the Electricity Act 1989 and the gas supply licences granted under the Gas Act 1986, as such code is modified from time to time in accordance with its provisions |
| Balancing and Settlement Code | means the Balancing and Settlement Code, as defined in the Electricity Supply Licences. |
| Energy Supplier | means a person which is either or both an Electricity Supplier and/or a Gas Supplier. |
| Smart Energy Code | means the code of that name maintained pursuant to the DCC Licence. |
| Half Hourly | refers to electricity being traded and/or settled on a half hourly basis. |
| Distribution Network Operator (DNO) | means a person holding an Electricity Distribution Licence. |
| Meter Equipment Manager (MEM) | means, as applicable, either: (a) for electricity, the Meter Operator Agent (as defined in the BSC) Appointed by an Electricity Supplier; or (b) for gas, the Meter Asset Manager (as defined in the UNC) Appointed by the Gas Supplier |
| Electricity Enquiry Service (EES) | means the service described as such in the EES Service Definition. |
| Data Items | means the most granular level of data defining a specific attribute in respect of a Data Type, the permissible values for which are defined and controlled in the Data Item Catalogue. |
| Metering Point Administration Service (MPAS) | means the service of that name which each DNO is required to provide under its Electricity Distribution Licence. |
| Electricity Retail Data Service (ERDS) | means the electricity registration services to be provided under this Code to support the provision of electricity retail data to the CSS and other services. |