



**Harmonised Retail Market Development Plan  
2012-2015**

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**Commercial and Confidential**

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## 1. Summary

Following the delivery of the Harmonised Baseline projects in NI and ROI, a common electricity retail market release strategy will be needed to ensure the integrity of the harmonised market messages and data definitions and codes, and thus ensure the baseline documents remain intact.

The release strategy will need to be compatible with any conditions set out in each of the Distribution System Operator's (DSO) licences, and take into account other market activities such as the gas retail market in NI and ROI, and the wholesale electricity market (SEMO).

This document proposes a release strategy based on:

- A market-wide schema release for both jurisdictions in June of each year from 2013 onwards; and
- A further non-schema release for each jurisdiction in any year. Although there is flexibility for each jurisdiction to decide the timing of this, as an underlying principle to reduce the impact on Market Participants operating in both jurisdictions, this would be scheduled for November of each year.
- There is also the possibility that exceptional ad-hoc releases may be necessary to fulfil regulatory or legislative requirements in either jurisdiction. These could be additional to the two planned releases mentioned above.

The appropriate governance structures of the Harmonisation Steering Group (HSG) and the Harmonisation Working Group (HWG) fora are already in place. It is expected that these will continue to be required in order to ensure the stability of the baseline, and agree and approve the content and timing of releases.

## 2. Introduction

The market systems in ROI and NI have undergone significant development work in recent years. In ROI a new central market system was deployed to facilitate the transition to a competitive retail market as part of the MOIP project back in 2004 / 2005. In 2012 NI will go live with the Enduring Solution (ES), a new market system which will leverage the existing ROI solution. The Harmonised Baseline will be introduced into the ROI through a release currently planned for September 2012. This will see a common SCHEMA deployed across both retail market jurisdictions.

Following both implementations in 2012, each jurisdiction will continue to manage their systems separately. There will however, be an ongoing operational requirement to ensure the market systems remain harmonised with one another. The release strategy outlined in this document aims to achieve this.

## 3. High level Release plan 2012- 2015

Post the implementation of the new market systems in 2012, a number of factors will need to be considered in agreeing ongoing systems releases. The content and timing of retail market releases will need to be co-ordinated between ESB and NIE to ensure the market systems remain harmonised, through common governance and change control arrangements already in place.

The market also needs to be cognisant of the fact that many Market Participants are now active in both the gas and electricity market. This will demand co-ordination with the market release strategy for the gas market.

Based on experience to date, taking the above into account, and subject to market direction, it is proposed to continue an approach based on two co-ordinated releases each year. The timing and content of each would need to be agreed with the market participants. Further, it is proposed that schema impacting change requests would be delivered in a June release in both jurisdictions. Non-schema impacting change requests (which are jurisdictional specific) could be delivered at a second point in the year; the date of this to be the choice of each jurisdiction, although preliminary discussions suggest that both NI and ROI would opt for November. This dual approach would reduce the burden on Market Participants, allow a degree of flexibility for jurisdictional specific changes, and yet deliver meaningful changes to ensure the continued development of the electricity retail market.

This strategy would be put in place to ensure a consistent approach to market releases and thus enable market participants to plan their resource requirements in an efficient manner.

**In summary, two market releases are proposed for each year. To minimise the impact on participants it would be beneficial to carry out one schema impacting release and one non-schema which would allow jurisdictional specific change requests to be delivered.**

#### 4. Prioritisation and Planning

In order to maximise the efficiency and value of each schema release a prioritisation process would be carried out in conjunction with all ROI and NI retail market participants in advance of any release.

The following table summarises the likely contents of each of a schema and a non-schema release.

Items for consideration for a schema release	Items for consideration for a non-schema release
Legacy schema impacting MCRs	Non-schema impacting MCRs
Regulatory driven work items	Jurisdictional specific MCRs
New ROI and NI MCRs	
Market design defects	

Existing Harmonisation Retail Design Service (HRDS) change control procedures set out an approach for impact assessment and prioritisation of MCRs by all market participants, and approval by the appropriate body (HSG, IGG, CDA Board). The list of approved and prioritised MCRs will then be reviewed by the DSOs who will consider the feasibility of their delivery; taking into account elements such as cost, technical complexity, resource requirements, compatibility with other system work including upgrades and maintenance. Change requests which involve a substantial amount of work and changes to the market design may need to be impacted separately to ensure the appropriate delivery timeline and resources are available. A key aspiration of the prioritisation exercise is to be as equitable as possible to all participants.

Assuming a schema release in June of each year, the following planning timeline would be indicated:

- Not later than September of the previous year, all potential MCRs for a schema release to have been approved by the relevant authority (HSG, IGG, CDA Board)
- During October, the DSOs to review and propose the contents of the next schema release for agreement with market participants at their November HWG meeting, for subsequent approval by HSG
- In this way, all market participants have a clear six month window in advance of the release to allow their technical delivery teams enough time to carry out their development and testing activities.

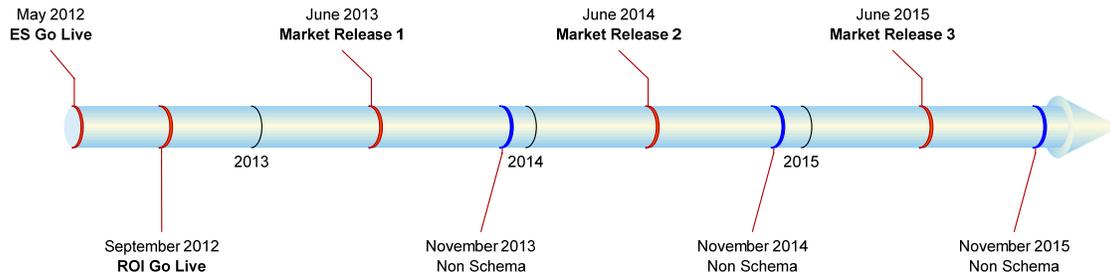
Change requests that are not approved in time for consideration or prioritised for delivery would be considered for a subsequent release.

The same process should be carried out for non-schema impacting MCRs. The jurisdictional basis of these will allow more flexibility in their management and their inclusion in any particular release.

The process for prioritisation and planning of any exceptional ad-hoc release to fulfil legislative and / or regulatory requirements in either jurisdiction would very much depend on the drivers for that release. However, any such planning and prioritisation activities would be based, to the fullest extent possible, on the proper execution of the change control process, and would seek Market Participant input through established HWG channels.

## 5. Timing considerations

It would be advantageous to consider fixing the release dates to ensure all participants can plan their resources well in advance. A proposed release schedule for the period 2012 – 2015 (this representing the duration of PR3 in ROI) is set out in Figure 1.



**Figure 1. Proposed release slots for harmonised Retail Market releases**

Splitting the releases into schema and non-schema allows each jurisdiction some flexibility in determining both the content and timing of a non-schema release. However, it should be remembered that most Market Participants operate in both jurisdictions and will want to minimise the number of releases in any year. As a planning principle, therefore, it will be desirable also to synchronise non-schema releases, and this is assumed in Figure 1. A non-schema release may be viewed as optional in either jurisdiction if no material changes are required.

This document sets out key principles which are relevant to all market participants. Some further points to note:

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- The exact nature and timing of market cutover for any schema release - particularly whether each jurisdiction cuts over for a market upgrade at the same time i.e. same weekend or the releases are staggered with a predefined gap. This will be decided on a release by release basis with discussion with the various stakeholders before adopting a position;
- There is an 'interim' period between the ES Go Live in NI in May 2012, and the first market release in June 2013. Optimally, NIE is not planning any releases for the NI market within that period. Any work carried over from the ES Go Live, and / or any high priority MCRs which arise may need to be accommodated in an interim release during this period. If so, such a release will require careful scheduling with the ROI release planned for September 2012 to reduce the overall impact.
- The HSG will review this development plan annually to ensure that the timings of the releases meet the requirements of the retail market. Regulatory driven work programmes e.g. SMART metering may necessitate reviewing the June /November sequencing to ensure maximum value can be gained from releases. Communication of any changes would be done through the HWG forum and in sufficient time to allow participants to plan accordingly.

## **6. Assurance**

Market assurance is currently carried out separately in each jurisdiction. HSG has agreed that any consideration of the introduction of a common assurance approach should take place once the Harmonised Baseline has been introduced in both jurisdictions. In the interim each jurisdiction will continue to manage their jurisdictional assurance approach separately.

## **7. Administration**

RMDS and CDA carry out the secretariat services to the RoI and NI markets respectively as well as co-ordinating market release activities in conjunction with HRDS .