

Product Lead	WS1A 2020 P7 Baseline Methodologies Helen Sawdon
Timeline	Jun – Dec 2020
Scope	<p>Description</p> <p>Undertake assessment of current work in the industry that relates to the development of a baselining methodology for measuring delivery of services through third party DER and recommend further actions DNOs/DSOs could take to achieve a consistent approach.</p> <p>Background</p> <p>This work was identified during gap analysis carried out in the 2019 ON WS1A programme under Product 3 – Dispatch & Settlement. To date each DNO/DSO has developed their capability in flexibility supporting differing methodologies to establish baselines. While DNOs experience operating flexibility is still in its infancy it is unpractical to establish good practice. However, it is agreed that any possible alignment in this area will benefit both providers and the DNO, therefore assessment of existing practices should be undertaken.</p> <p><u>Sub-deliverable a.</u></p> <p>Establish success criteria and detailed scope.</p> <ul style="list-style-type: none"> • Agree common success criteria & baseline principles. It is anticipated the baseline principles will consider and weight criteria which will include the following;

- Accuracy tolerance,
- implementation complexity,
- DNO replicability,
- provider stack-ability,
- DNO verifiability,
- DNO/Provider benefits.
- Any others as identified.

- Produce relevant questions for WS1A July public consultation.
- Define scope for consultancy support & procure consultants.

Final Deliverable

- Finalise product Scope document.
- Consultant scope document.
- Draft baseline principles.
- Consultation questions.

Sub-deliverable b.

Information gathering & assessment – Consultant led.

- Research existing UK ESO & DSO baselining practices along with any EU ENA member SOs identified as relevant by ENA.
- It is anticipated the consultants research will consider the following statements;

- The baseline methodology should be common across the defined Distribution Flex Product types.
- A suite of methodologies may need to be developed to support differing DER types e.g. storage, turn-down, generation etc...
- A baseline determined using historical (weekly/monthly) demand data will support provider stack-ability opposed to a real-time baseline.
- Any others as identified.
- Assess responses to WS1A July consultation.
- Engage further with any existing industry expertise that is identified.
- Weight/score existing baseline practices in line with agreed baseline principles.

Final Deliverable

- Draft findings & Recommendations report.

Sub-deliverable c.

Recommendations & implementation.

- Assess and agree recommendations from Findings Report.
- Present findings to WS/SG group and agree if common approach can/should be adopted.
- Final findings & Recommendations report.
- Gap analysis and impact assessment of implementation (IT systems, resource etc.).
- Produce timeline for adoption of common approach.

	<p>Final Deliverable</p> <ul style="list-style-type: none"> • Final findings & Recommendations (Product) report. • Implementation timeline, if applicable. <p>Exclusions</p> <ul style="list-style-type: none"> • Interface protocol standardisation. • Payment mechanics for settlement and under-delivery. <p>Assumptions</p> <ul style="list-style-type: none"> • Freely shared methodologies from all parties including ESO. <p>Constraints</p> <ul style="list-style-type: none"> • Not all DNOs will have established methodologies yet.
Key Activities	<ul style="list-style-type: none"> • Establish distribution flexibility baseline principles. • Compare merit of existing baseline practices to principles. • Make recommendations for standardisation.
Outcomes	<p><u>Customer Outcomes</u></p> <p><u>Tangible benefits/outcomes to be delivered through this work by 2020</u></p> <p>Recommendation for standardisation of distribution flex baseline methodologies.</p> <p>Timeline for implementation, if considered appropriate.</p>

Stakeholder Engagement (outside advisory group)	<ul style="list-style-type: none"> • ENA Public consultation – July 2020. • Consultant led engagement with any identified expertise.
Dependencies	<p>Predecessors (Takes input from)</p> <ul style="list-style-type: none"> • WS1A 2019 P3 Dispatch & Settlement. <p>Successors (Provides input to)</p> <ul style="list-style-type: none"> • n/a <p>Other linkages/considerations</p> <ul style="list-style-type: none"> • Would closely link to settlement methodologies and Interface protocol standardisation are if these were to be considered by Open Networks in the future.
Review & Approval Cycles	<p>WS July 2020 – Approve product scope and consultant EOI. Aug 2020 – Review consultant scope. Nov 2020 – Review recommendations report.</p> <p>SG Nov/Dec 2020 – Approve recommendations report.</p> <p>AG Nov 2020 – Review recommendations report.</p>

	Others n/a
Other Comments	