

WAMRP RETAIL FORUM KICK OFF INFORMATION SESSION

October 2016

PRESENTED BY ALLICIA VOLVRICHT



AGENDA

- Background
- Purpose
- Objectives
- Engagement
- Approach
- Contact Information
- High Level Scope
- Key Assumptions
- Forum Participation/Approach
- Retail Work Packages
- Questions and feedback

- In 2014, the Minister of Energy initiated the Energy Market Review (EMR).
- EMR recommendations included implementing changes needed to implement full retail contestability (FRC).
- Key retail changes (to date) will be:
 - AEMO to be the retail market operator for the South West Interconnected System (SWIS).
 - AEMO will operate the retail market under an WA adopted Chapter 7 of the National Electricity Rules (NER). Relevant aspects of the NER will also be adopted to make Chapter 7 operational.
- These changes are effective from 1 July 2018.

- What is the purpose of this presentation?
 - To outline the approach for how AEMO intends to manage the Retail Forum and to provide an outline of the Retail Work Packages
- Purpose of the Retail Forums?
 - These Forums will enable AEMO to provide information to and seek input from Market Participants to implement NEM systems, processes and procedures in Western Australia, and ensure market readiness.

OBJECTIVES OF THE RETAIL FORUM



- To support and implement processes and systems required by AEMO to function as the Retail Market Operator and by Market Participants.
- Prepare for a future implementation of Full Retail Contestability (FRC)
- To inform the development and implementation of procedures, guidelines and other relevant documentation to facilitate timely delivery of Procedures.
- Outline Market Reform timelines and the change management process for participants
- Seek contributions from participants and actively discuss matters during information sharing and forum discussions.

*Subject to the final rule determination

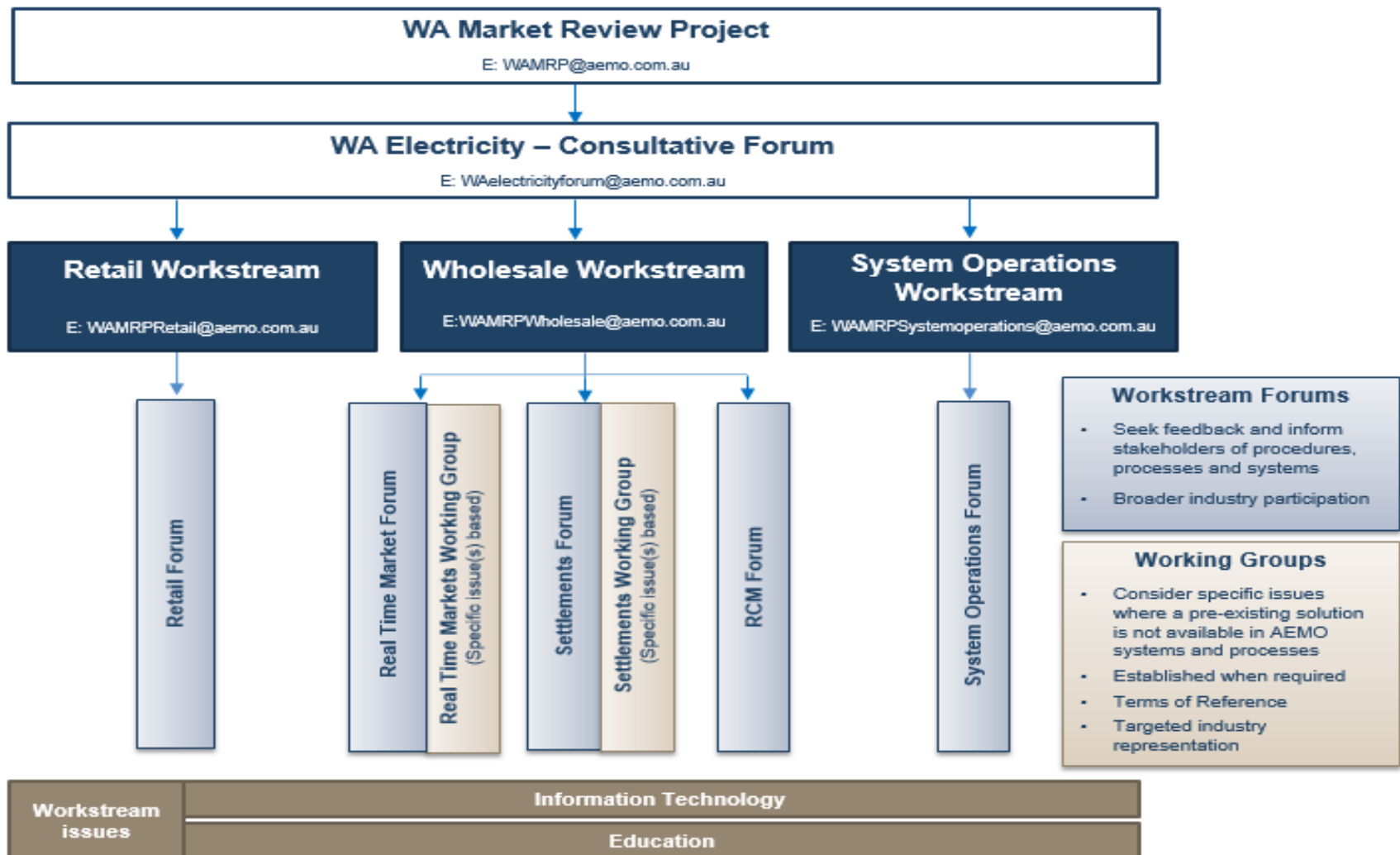
OBJECTIVES OF THE RETAIL PROJECT



The primary objectives of the retail market project are:

- By 1 July 2018, develop and implement Retail Market Procedures established under Chapter 7 of the Rules.
- Prepare for proposed implementation of Full Retail Contestability (FRC) by July 2019
- Implementation of the NEM retail market framework to Western Australia.
- The transition of retail market operations for the existing tranche of contestability from Western Power to AEMO
- Market readiness of key WA participants for the new arrangements.
- Support settlement and wholesale functions, including energy and RCM billing and Prudential's.

WAMRP OVERALL ENGAGEMENT STRUCTURE



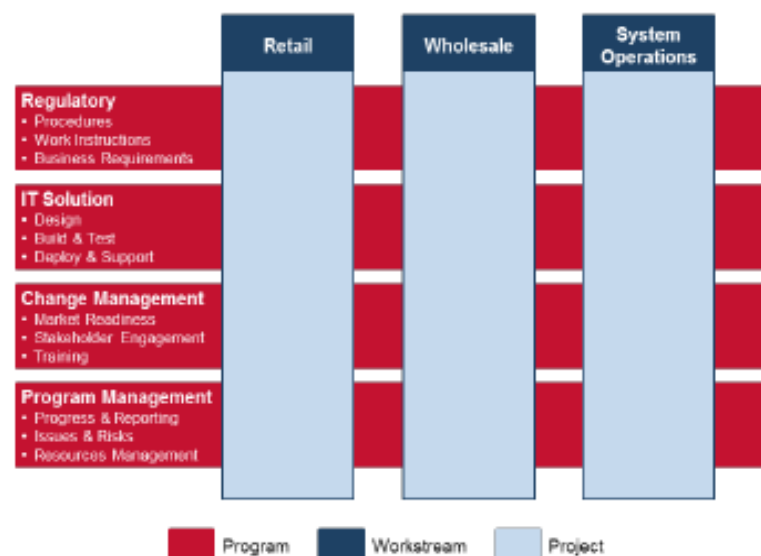
OVERALL WAMPR APPROACH

The WAMRP utilises a matrix Delivery Model to drive a structured, integrated approach

Workstreams have ultimate accountability to deliver the scope of the projects. Supported by the program workstream which will focus on the following four key functional areas:

- 1 Regulatory is at the heart of the program, the focus areas are:
 - PUO engagement during high level design and Rules drafting
 - Development and updating of new and existing Market Procedures, in consultation with industry participants
 - Publication of market guides to assist participants
- 2 The new market design will need to be underpinned by a robust, fit for purpose IT solution, the approach will:
 - Be lead by the IT Solutions manager with cross workstream input
 - Leverage existing NEM systems and implement modifications as required for the WEM
 - Ensure robust UAT is undertaken
- 3 A rigorous approach to Change Management will be essential to ensure AEMO and Market Participant Readiness, this will involve:
 - Internal and external stakeholder identification and engagement
 - Change impact assessment and management
 - Internal and external capability training
 - Readiness framework and assessments, with a structured go-no go review process undertaken prior to making a decision to proceed
 - Program communications

WA Market Reform Program Delivery Model



- 4 A consistent approach will be taken to Program Management across workstreams and the Program Office, workstreams will:
 - Interface with the Program Office and other workstreams
 - Coordinate input to the PUO
 - Monitor and reporting on progress, risks, issues and assumptions
 - Manage workstream resource and support service requirements
 - Manage scope to protect timelines/schedule and cost
 - Coordinate internal and external quality assurance activities

The Retail Market Project will involve program management across the following areas:

- Coordination of market framework and regulatory design input to the PUO.
- Coordination and management of stakeholder engagement activities.
- Coordination and management of the regulatory/procedure activities.
- Coordination and management of the IT solution activities.
- Coordination and management of the market readiness activities.

OVERALL CONTACT INFORMATION



All Market Participants can be kept up-to-date on progress of the WAMRP through the WA Electricity Consultative Forum which meets bi-monthly.

In addition, AEMO will provide updates and relevant information on AEMO's website at: <http://aemo.com.au/Stakeholder-Consultation/Industry-forums-and-working-groups/WA-Forums>

Contact Information

Overall Program enquiries	WAMRP@aemo.com.au
WA Electricity – Consultative Forum	WAElectricityforum@aemo.com.au
Retail Workstream	WAMRPRetail@aemo.com.au
Wholesale Workstream	WAMRPWholesale@aemo.com.au
System Operations Workstream	WAMRPSystemoperations@aemo.com.au
Website for information purposes	http://aemo.com.au/Stakeholder-Consultation/Industry-forums-and-working-groups/WA-Forums

- Systems - Market Settlement and Transfer Solution, B2B Hub
- Transition and cleansing of NMI standing data and consumption data
- Provision of services for discovery and access of NMI standing data Define and manage NMI standing data required for wholesale and retail functions
- Provision of services to facilitate customer transfers and associated responsibility
- Management of meter data used for settlement and related purposes

- Preparation of meter data ready for settlement and RCM
- Batch and user interfaces for participants to facilitate retail functions
- Metering and metrology arrangements Provision of business-to-business functions, including advanced metering transactions associated with Updating the Electricity B2B Platform
- Establishment of participants undertaking retail-related functions
- Establish arrangements to promote readiness of the industry
- Establish arrangements to allow introduction of full retail contestability

KEY RETAIL ASSUMPTIONS

- Retail and wholesale market rules change over on 1 July 2018 Policy
- NER Chapter 7 will be adopted including enhanced metering competition, and also new B2B arrangements (with some derogations/variances – e.g. Embedded Networks)
- Transitional rules (as required) will be in place that will allow AEMO to gather data, register participants and facilities, etc. in advance of 1 July 2018
- FRC will be implemented on 1 July 2019 (or later)
- Systems, processes and procedures for retail will be largely aligned with NEM systems and processes
- There will be a Market Trial commencing early 2018

- In the interests of facilitating targeted, technical discussions on procedures, guidelines and process changes. AEMO requested impacted stakeholders organisations to nominate representatives (maximum of 2 representatives).
- Participants are expected to have sufficient expertise and authority to
- consider matters on behalf of their organisation.
- Multiple representatives from an organisation may be included on email distribution lists for information purposes
- Each organisation is to advise *AEMO of any changes to their nominated representatives*

RETAIL FORUM APPROACH



- Meetings will be initially scheduled monthly with additional meetings being scheduled as required (e.g. during the consultation period), the meeting duration will be subject to the agenda.
- Out of session scheduled meetings may also be required to address specific issues.
- Initial Priority 2016 pre Rules – Forums will focus on the development of Procedures
- Meetings will be chaired in AEMO's Perth office with videoconferencing facilities available and be face-to-face. However, teleconference meetings may be required subject to specific issues and during the phase of the consultation process.
- Location: AEMO Office, Level 17, 197 St Georges Terrace Perth WA 6000.

- The key outcomes of each scheduled retail forum meeting will be distributed to the Retail Forum distribution mailing list.
- Documentation will be published on AEMO's website following each meeting.
- AEMO will provide the Chair, secretariat services and subject matter experts where required.
- Any expenses incurred as a result of attending meetings or activities associated with the Working Group will be at the expense of the attendee's employer.

RETAIL WORK PACKAGES

WORK PACKAGES FOR RETAIL
PROCEDURE, GUIDELINES & SUPPORTING
DOCUMENTS

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- AEMO will be consulting on the Retail Procedures in several work packages
- Initial Priorities will be on the Retail Market Procedures which require formal consultation under the NER.
- The Final Determination Retail Procedures for the Power of Choice Rules effective 1 December 2017 will be the baseline used for WA Retail, the order of the WA Retail Packages takes into consideration the PoC Timelines
- AEMO has commenced initial review of WA Work Package 1 which is based on the Power of Choice (PoC) Work Package 1 procedures.
- For further information on PoC refer to AEMO's website [here](#).

Prior to the start of formal consultation:

- AEMO will facilitate retail forums to discuss and provide an overview of the NEM Retail Market Procedures, outline where changes may be required to include WA as a participating jurisdiction and to discuss matters where AEMO may require input from stakeholders as part of the development of the WA Retail Procedures prior to formal consultation.
- The target audience for these workshops will be technical SME's who will need to have an understanding of the Proposed changes to the WA Rules

- Amend and publish relevant retail Procedures, established under Chapter 7 of the Rules:
 - Metrology Procedures
 - MP and MDP Service Level Procedures
 - Meter Churn Procedures
 - MSATS Procedures
 - NMI Standing Data Schedule
 - RoLR Procedures
 - B2B Procedures
 - Network Device Procedures
 - Minimum Services Specification
 - Emergency Priority Procedures
 - Registration and accreditation procedures

RETAIL SESSIONS 1, 2 AND 3 - SUMMARY

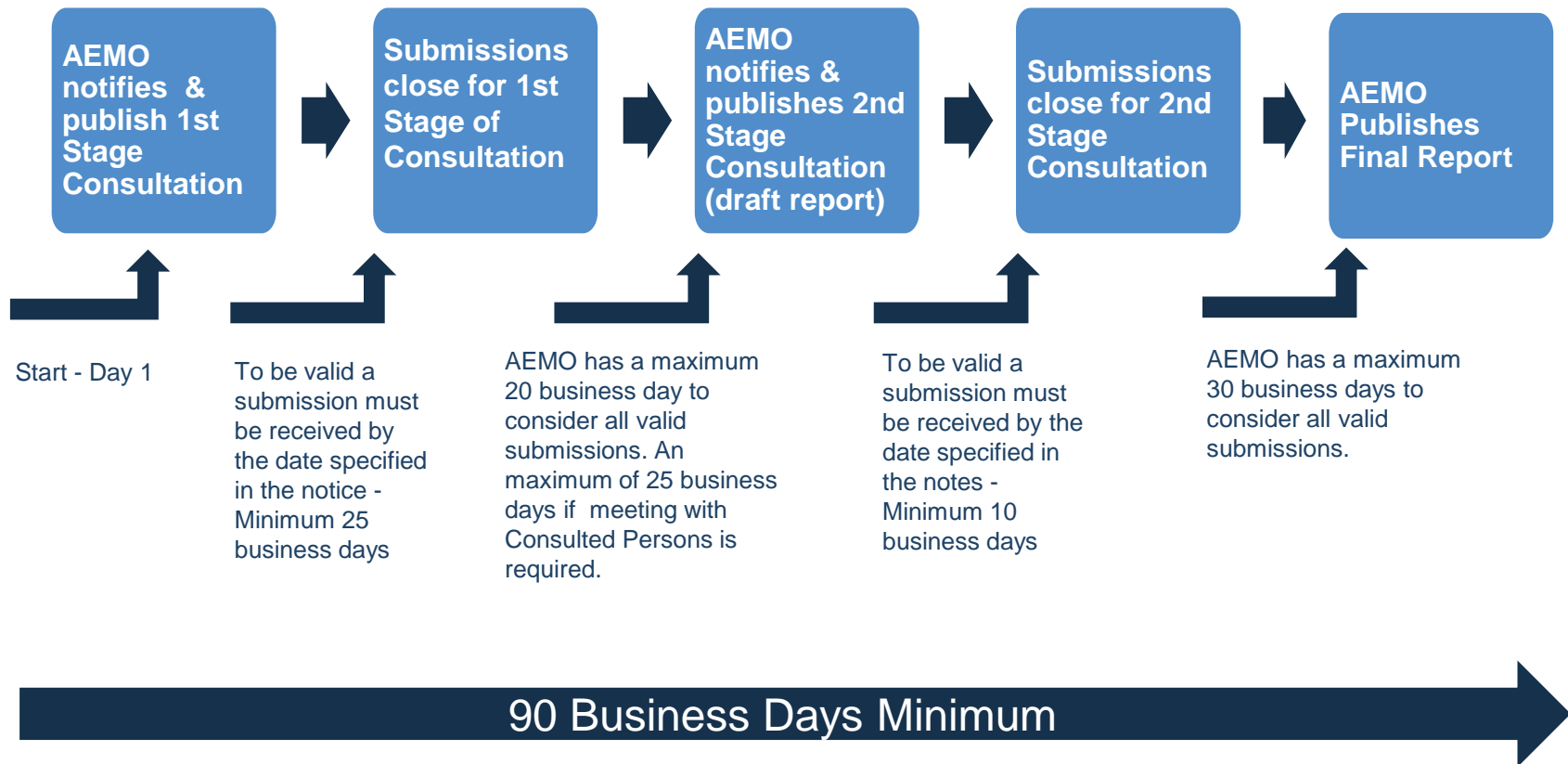


Procedure Information Sessions (Pre final Rule)

21 October 2016	18 November 2016	16 December 2016
<i>Kick Off Presentation – Overview of Procedure Work Packages & Timelines</i>	<i>Procedure Discussion Topics:</i> <ul style="list-style-type: none">• <i>Service Level Procedures MDP</i>• <i>Service Level Procedures</i>• <i>Meter Data File Format (MDFF)</i>• <i>MSATS Procedures – Meter Data Management (MDM) Procedures</i>• <i>Metering Data Provision Procedures</i>	<i>Procedure Discussion Topics:</i> <ul style="list-style-type: none">• <i>MSATS Procedures: CATS Procedures Principles and Obligations</i>• <i>MSATS Procedures: Procedure for the Management of Wholesale, Interconnector, Generator and Sample (WIGS)</i>
<i>Procedure Discussion Topics:</i> <ul style="list-style-type: none">• <i>Metrology Procedures Part A</i>• <i>Metrology Procedures Part B</i>• <i>NMI Standing Data Schedule</i>• <i>NEM RoLR Processes</i>		

*Additional Forums will be scheduled for 2017 to coincide with work packages

NER RULES CONSULTATION PROCESS



Consultation will be conducted in accordance with the consultation timelines for Procedures under clause 8.9 of the NER.

WORK PACKAGE KEY DATES



AEMO has structured the Procedure changes into 5 work packages, consultations are planned to be completed by the following timelines:

- Work Package 1 – July 2017
- Work Package 2A - August 2017
- Work Package 2B - September 2017
- Work Package 2C – October 2017

Work packages which do not require formal consultation under the NER (supporting documents/guidelines) are planned to be published by the following timelines:

- Work Package 3 – Published - August 2017
- Work Package 4 – Published - September 2017

Retail Stream – WA EMR

High Level overview V0.1 – 21 October 16



Industry Milestones & Dependencies

- Power of Choice
- Embedded Networks
 - Metering Competition
 - Meter Replacement Processes
 - Updating the B2B Electricity Platform (SMP)

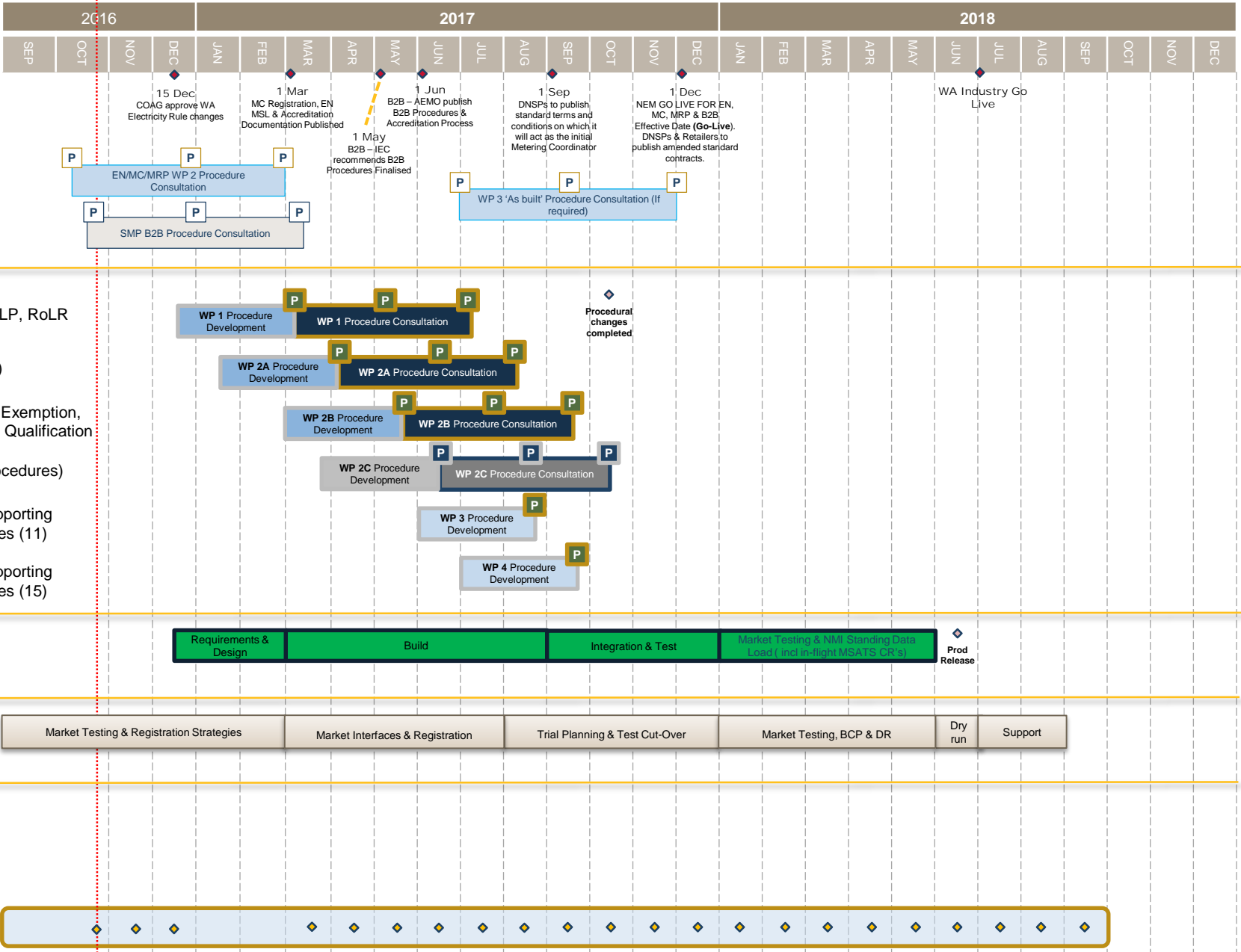
Procedures

- WP 1 –Metrology, SLP, RoLR & Meter Data (9)
- WP 2A – MSATS (2)
- WP 2B – Glossary, Exemption, Deregistration, MSP Qualification
- WP 2C – B2B (6 procedures)
- WP 3 – Various Supporting documents/guidelines (11)
- WP 4 – Various Supporting documents/guidelines (15)

IT Solution

Market Readiness

WA Retail Forums



PROCEDURE WORK PACKAGE 1

D o c u m e n t N o	Document Name	Indicative Retail Forum No & Date	Indicative dates to commence Formal Consultation. *Subject to Passing of Rules	Location of Document (current version at time of this presentation)
1	Metrology Procedures Part A	Forum No 1 21 Oct 16	AEMO notifies & publishes 1st Stage Consultation 3/3/2017 1 st Stage Stakeholder submissions 6/3/17 – 10/4/17 AEMO notifies & publishes 2nd Stage Consultation (Draft Report) 11/5/17 2 nd Stage stakeholder submissions 12/5/17 to 25/5/17	Baseline to be used will be Procedures requiring NER consultation under WP1 published for Power of Choice 1 March 2017, Effective 1 December 2017. Refer to Final Determination Procedures Published for Power Of Choice – Effective from 1 Dec 2017. Can be found on AEMO's Consultation Page : http://www.aemo.com.au/Stakeholder-Consultation/Consultations/Power-of-Choice---AEMO-Procedure-Changes-Package-1 http://www.aemo.com.au/Stakeholder-Consultation/Consultations/-/media/5FCF1D00BBB04275989D499BF3C7181C.a.shx
2	Metrology Procedure Part B			
3	NMI Standing Data Schedule			
4	NEM RoLR Processes: Part A - MSATS Procedure: RoLR Procedures; and Part B – B2B Procedure			
5	Service Level Procedures for MDP	Forum No 2 18 Nov 16	AEMO publishes Final Report 6/7/17	Also refer to POC webpage - http://www.aemo.com.au/Stakeholder-Consultation/Industry-forums-and-working-groups/Retail-meetings/Power-of-Choice *These may be undergoing further consultation prior to POC effective date
6	Service Level Procedures for MP			
7	Meter Data File Format (MDFF)			
8	MSATS Procedures: MDM Procedures			
9	Metering Data Provision Procedures			
				http://www.aemo.com.au/Electricity/National-Electricity-Market-NEM/Retail-and-metering/-/media/C911BABC13C743D3906310238275D9F1.ashx

PROCEDURE WORK PACKAGE 2 A AND B



D O C U M E N T	Work Pack No	Document Name	Indicative Retail Forum No & Date	Indicative Dates to commence Formal Consultation * Subject to Passing of Rules	Location of Document (current version at time of this presentation)
1	2A	MSATS Procedures: CATS Procedures Principles and Obligations	Forum No 3 16 Dec 16	AEMO notifies & publishes 1st Stage Consultation 10/4/2017 1 st Stage Stakeholder submissions 11/4/17 – 16/5/17 AEMO notifies and publishes 2nd Stage Consultation (Draft Report) 14/6/2017 2nd Stage stakeholder submissions 15/6/17 – 28/6/17 AEMO publishes Final Report 9/8/17	Baseline to be used will be Procedures requiring NER consultation under WP1 published for Power of Choice 1 March 2017, Effective 1 December 2017. Refer to Final Determination Procedures Published for Power Of Choice – Effective from 1 Dec 2017 found on AEMO's Consultation Page http://www.aemo.com.au/Stakeholder-Consultation/Consultations/Power-of-Choice---AEMO-Procedure-Changes-Package-1 http://www.aemo.com.au/Stakeholder-Consultation/Consultations/-/media/5FCF1D00BBB04275989D499BF3C7181C.ashx
2	2A	MSATS Procedures: Procedure for the Management of Wholesale, Interconnector, Generator and Sample (WIGS)			*These may be undergoing further consultation prior to POC effective date
4	2B	Retail Market Electricity Procedures – Glossary and Framework	Forum No 4 Date TBD March 17	AEMO notifies & publishes 1st Stage Consultation 22/5/17 1 st Stage Stakeholder submissions 23/5/17 – 27/6/2017 AEMO notifies and publishes 2 nd Stage Consultation (Draft Report) 25/7/2017 2nd Stage stakeholder submissions 26/7/2017 – 08/08/2017 AEMO publishes Final Report 19/9/2017	Please note these Procedures are currently under consultation for Power of Choice. First Stage Consultation commences 10 th October 2016, submissions close 15 Nov 2016. Draft Report published 13 Dec 2016, submissions close 16 Jan 2017 with Final Report anticipated to be published 28 Feb 2017, effective 1 Dec 2017 Refer to AEMO's consultation Page for POC Package 2. http://www.aemo.com.au/Stakeholder-Consultation/Consultations/Power-of-Choice---AEMO-Procedure-Changes-Package-2
5	2B	Exemption Procedure for Malfunctioning Metering Installations			http://www.aemo.com.au/Stakeholder-Consultation/Consultations/Power-of-Choice---AEMO-Procedure-Changes-Package-2
6	2B	Default and Deregistration Procedure (NEW)			Also refer to POC webpage - http://www.aemo.com.au/Stakeholder-Consultation/Industry-forums-and-working-groups/Retail-meetings/Power-of-Choice
7	2B	Metering Service Provider Qualification Procedure (NEW)			

PROCEDURE WORK PACKAGE 2C

B2B PROCEDURES



D O C U M E N T N O	Document Name	Indicative Retail Forum No & Date	Indicative Dates to commence Formal Consultation *Subject to passing of Rules and IEC approval	Location of Document (current version at time of this presentation) *Note these procedures are currently being updated for Power Of Choice. Location of new Procedures will be updated once Final Determination is published.
	1 B2B Procedure - Service Order Process	Forum No 5 Date TBD April 17	AEMO notifies & publishes 1st Stage Consultation 16/6/2017 1 st Stage Stakeholder submissions close 21/7/2017 AEMO notifies and publishes 2nd Stage Consultation (Draft Report) 2nd Stage stakeholder submissions 5/9/2017 AEMO publishes Final Report 17/10/17	These documents require formal consultation under the NER. Baseline to be used for WA will be the B2B Procedures published for Power of Choice - Updating Electricity B2B Framework. These procedures are currently being updated for Power Of Choice and will be formally consulted on. Consultation timelines for POC are anticipated to commence 1 st Stage Consultation Oct 16, Second Stage Dec 17, Final Procedures Published March 2017, Effective 1 December 2017. *subject to IEC approval (IEC have until May 2017) Refer to AEMO's Consultation page. Also refer to POC B2B Working Group Webpage http://www.aemo.com.au/Stakeholder-Consultation/Industry- forums-and-working-groups/Retail-meetings/POC-Business-to- Business-Working-Group In the meantime, current versions can be found on AEMO's website for versions effective up to 1 st Dec 2017. http://www.aemo.com.au/Electricity/National-Electricity- Market-NEM/Retail-and-metering/Business-to-business- procedures
	2 B2B Procedure - Customer & Site Detail Notification Process			
	3 B2B Procedure - Meter Data Process			
	4 B2B Procedure – One Way Notification			
	5 B2B Procedure – Technical Guidelines for B2B Procedures			
	6 B2B Procedure – Technical Delivery Specification			

GUIDELINE/CHECK LISTS WORK PACKAGE 3



D O c N o	Document Name	Indicative Retail Forum No & Date	Indicative Date to Publish *Formal consultation not required	Location of Document (current version at time of this presentation)
1	Metering Service Provider Registration Guideline (Part 1)	Forum No 6 Date TBD June 2017	August 2017	Baseline to be used will be for Power of Choice, (POC) effective 1 Dec 2017.
2	Metering Service Provider Application Form (Part 2)			These documents are under review//yet to be created for Power of Choice. They do not require formal consultation under the NER.
3	Metering Provider Category B Types 1-4 Accreditation Checklist (Part 3)			First drafts for POC are planned for Dec 16 and anticipated to be published in March 2017. Effective 1 Dec 2017
4	Metering Provider Category A 5-6 Accreditation Checklist (Part 4)			Location of documents will be updated once published.
5	Metering Provider Category B 5-6 Accreditation Checklist (Part 5)			For current versions of available guidelines effective up to 1 Dec 17, refer to AEMO's website
6	Metering Data Provider Category D 1-4 Accreditation Checklist (Part 6)			http://www.aemo.com.au/Electricity/National-Electricity-Market-NEM/Retail-and-metering/Metering-procedures-guidelines-and-processes
7	Metering Data Provider Category C 5-6 Accreditation Checklist (Part 8)			
8	Metering Data Provider Category D 5-7 Accreditation Checklist (Part 9)			
9	Exemption Guideline (small customer metering installation) (NEW)			
10	Metering Coordinator Registration Guideline (NEW)			
11	Metering Coordinator Application Form (NEW)			

USER GUIDES/SUPPORTING DOCUMENTS WORK PACKAGE 4



D O C U M E N T S	Document Name	Indicative Retail Forum No & Date	Indicative Date to Publish *Formal Consultation Not Required	Location of Document (current version at time of this presentation)
1	Metering Coordinator Guideline (NEW)	Forum No 7 Date TBD July 2017	Sept 17	<p>Note, Baseline to be used will be WP3 published for Power of Choice (POC). These documents do not require formal consultation under the NER</p> <p>Please note these documents are under review//yet to be created for Power of Choice.</p> <p>POC is planning to release documents in July 2017, effective 1 December 2017.</p> <p>Location of documents will be updated once published.</p> <p>For current versions of available guidelines effective up to 1 Dec 17, refer to AEMO's website</p> <p>http://www.aemo.com.au/Electricity/National-Electricity-Market-NEM/Retail-and-metering/Market-Settlement-and-Transfer-Solutions</p>
2	Special and Technology Related Sites within the NEM			
3	National Metering Identifier Allocation List			
4	MSATS Participant User Interface Guide – Introduction to MSATS			
5	MSATS Participant User Interface Guide – Guide to User Rights Management			
6	MSATS Participant User Interface Guide – Guide to MSATS B2B			
7	MSATS Participant User Interface Guide – Guide to MSATS Web Portal			
8	MSATS Participant User Interface Guide – MSATS Ombudsman Enquiry User Interface Guides			
9	MSATS CATS Hints and Tips			
10	Operating Procedure - MSATS-NMI Discovery Questions and Answers			
11	Operating Procedure - Standing Data for MSATS			
12	Operating Procedure - MSATS CATS History Model			
13	Technical Guide to Bulk Data Tool for MSATS			
14	Service Paper Reference Table			
15	List of National Electricity Market Procedures, Guideline's & documents required by Chapter 7			

QUESTIONS

