



5MS & GS Program Consultative Forum #38

Friday, 22 October 2021

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AEMO

Competition Law Meeting Protocol

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Participants in AEMO discussions **must**:

1. Ensure that discussions are limited to the matters contemplated by the agenda for the discussion
2. Make independent and unilateral decisions about their commercial positions and approach in relation to the matters under discussion with AEMO
3. Immediately and clearly raise an objection with AEMO or the Chair of the meeting if a matter is discussed that the participant is concerned may give rise to competition law risks or a breach of this Protocol

Participants in AEMO meetings **must not** discuss or agree on the following topics:

1. Which customers they will supply or market to
2. The price or other terms at which Participants will supply
3. Bids or tenders, including the nature of a bid that a Participant intends to make or whether the Participant will participate in the bid
4. Which suppliers Participants will acquire from (or the price or other terms on which they acquire goods or services)
5. Refusing to supply a person or company access to any products, services or inputs they require

Under no circumstances must Participants share Competitively Sensitive Information. Competitively Sensitive Information means confidential information relating to a Participant which if disclosed to a competitor could affect its current or future commercial strategies, such as pricing information, customer terms and conditions, supply terms and conditions, sales, marketing or procurement strategies, product development, margins, costs, capacity or production planning.

Agenda

#	Time	Topic	Presenter
1	11:00 – 11:05	Welcome	Peter Carruthers
2	11:05 - 11:10	Actions from Previous Meetings	Anne-Marie McCague
3	11:10 – 11:20	5MS & Customer Switching – the first 2 weeks	Graeme Windley & Greg Minney
4	11:20 – 11:30	Approach to PIR	Peter Carruthers
5	11:30 – 11:40	Approach to Global Settlement & MS DR Engagement	Anne-Marie McCague
6	11:40 – 11:50	Next Steps	Anne-Marie McCague
7	11:50 – 12:00	Meeting Close	Peter Carruthers



Welcome

Peter Carruthers

Actions from Previous Meetings

Anne-Marie McCague

PCF Actions

No.	Status	Action	Comment
37.9.1	Closed	AEMO to consider industry checkpoint meetings on 2 and 3 October.	
37.11.1	Closed	AEMO to provide a high level view of the GS Plan and how the working group(s) will be structured.	
37.11.2	Closed	AEMO to provide an update to questions asked 16-Sept PCF – particularly around AEMO's view on alternative GS start dates and approach for consolidated CRs.	GS start date is set in the rules. AEMO is currently reviewing risks to 1 May and mitigation measures. A key risks is the bundling of GS, MSDR and MCPI. Internal investigations into the impact of this risk are ongoing and will be discussed with the May 2022 RWG in November.



5MS & Customer Switching: the first 2 weeks

Greg Minney

5MS – the first two weeks

Overall status: 5MS and Customer Switching operations commenced as scheduled on 1 October. The NEM is successfully operating in 5m mode.

Cutover

- Cutover was successful with no major issues reported

Bidding

- Participants have been submitting 5-minute bids, through two weeks of operation.

Retail

- Metering data is being delivered to AEMO with 5m granularity by required MDPs, with delivery problems experienced by one MDP
- 8 new issues have been added to the Issues Log : 4 in relation to RM report reconciliation and 4 in relation to meter data delivery (2 closed).

Settlements

- Transition week preliminary invoice issued on 8-Oct, Week 41 Preliminary due 15 Oct.
- Missing data from one MDP is having an impact on the quality of statements issued, BAU processes for impact management in place

Customer Switching

- Implementation of Customer Switching capability was successful as part of the Retail cutover.
- 6 open issues have been added to the Issues Log in relation to CRs, with resolution in progress for key items

Participant Support

- The Support Room was open from 23:30 30-Sep until 03:00 01-Oct and was utilised by approximately 25 participants during their restart period.
- The Support Room was open from 08:00 to 17:00 on 01-Oct and was utilised by 2 participants.
- Daily Q&A sessions have commenced with good attendance. Has now been reduced to 3 days per week in line with approach discussed with PCF prior to 1 Oct. Majority of issues raised relate to Retail (5MS and CS), with very few issues from bidding perspective.

Participant Feedback on Industry Cutover

Purpose

- AEMO request informal feedback from a number of participants to get a sense of **the industry-wide cutover experience** and any emerging issues.
- 7 responses have been received to date: 1 MDP, 2 Retailers, 1 Generator, 3 Gentrailers

Key Messages

- All respondents reported a smooth cutover. Respondents identified the success to be as a result of Market Trial (2), strong internal testing programs (2) and early or staged transition (5)
- Most respondents confirmed that their operations have proceeded as expected with initial teething issues both internal and external to their operations
- No systemic issues were identified
- B2B delivery from some participants is of concern i.e. MDP data delivery
- RM report reconciliation continues to be a concern for a number of respondents.

Approach to PIR

Peter Carruthers

Approach to Post Implementation Review

- AEMO will conduct a Post Implementation Review of the 5MS Project
- Review to be conducted by an independent external party.
 - Procurement process is presently underway
- Objectives
 - AEMO 5MS Post Implementation Lessons Learned
 - Industry Wide Lessons Learned
- Timing
 - Commencing as soon as possible – early November likely
 - Approx. 8 week review expected
 - Targeting initial observations/conclusions by mid-December
- Industry Engagement
 - Expecting an electronic questionnaire to be circulated
 - Supported by selected participant interviews
 - Further information will be provided to Executive Forum in early December

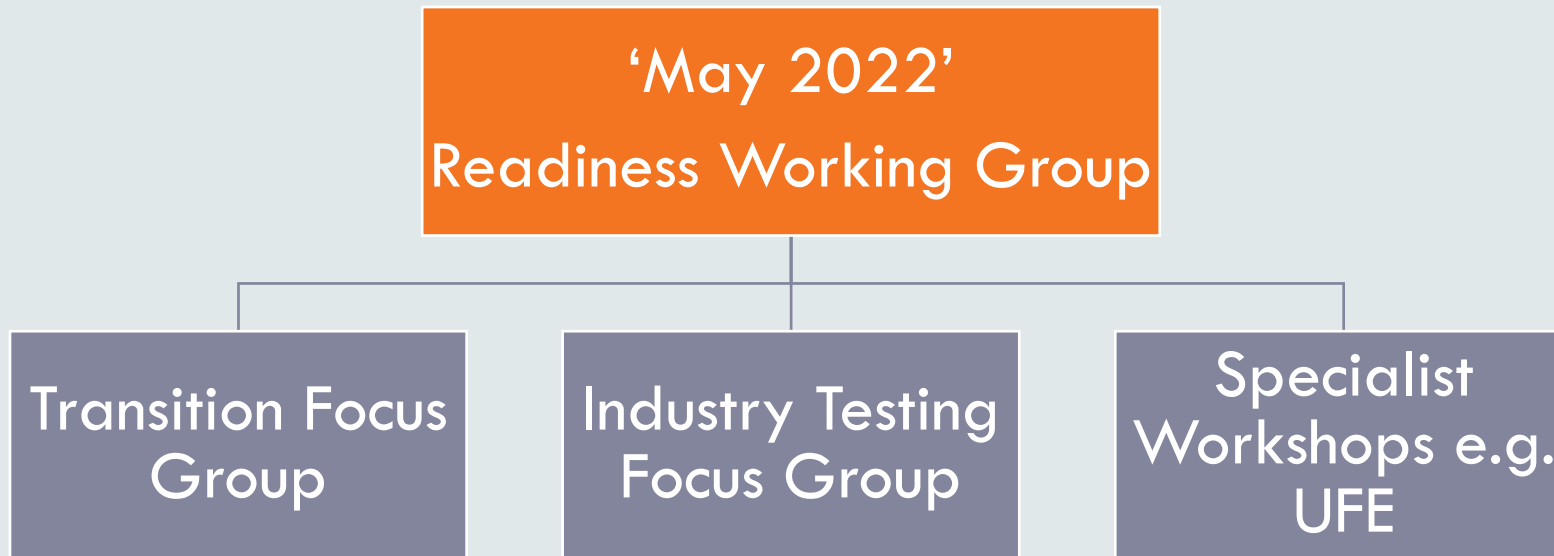
Approach to Global Settlement & MSDR Engagement

Anne-Marie McCague

Approach to GS/MSDR/MCPI engagement

- This approach has been presented to the RWG on 12 Oct and feedback has been received.
- AEMO intends to provide a coordinated approach for all key initiatives that commence on 1 May 2022, including:
 - Global Settlements (GS) Rule Commencement
 - MSATS Standing Data Review (MSDR), Phase 1
 - Metering Coordinator Planned Interruption (MCPI)
- A consolidated set of milestones, issues and risks will be developed and managed across all initiatives
- AEMO does not propose a formal readiness reporting regime. Participants will be responsible for their own readiness and compliance obligations
 - Feedback from RWG indicated that some form of readiness monitoring should be implemented. Further discussions will take place at RWG
- Alignment of MCPI/MSDR and GS implementations to be managed as implementation risk under governance framework
 - GS Rule Commencement date is a key priority in managing implementation risk

Proposed Governance



- Nominations to be called for the May 2022 RWG

- May 2022 RWG will be a consolidation of 5MS PCF and RWG topics and objectives.
- An Executive Forum is not proposed given the scope and impact of the changes. Participants will be responsible for briefing their Executives.
- Focus Groups may be established and closed as required, in consultation with RWG.
- Feedback received to date confirms that this approach is acceptable.

Engagement Framework

Engagement Option	Purpose	Frequency / Timeframe	Representation	Materials
Readiness Working Group	<ul style="list-style-type: none"> Overall Program management <ul style="list-style-type: none"> Program milestones Issue and risk management Initiative Dependencies Specialist Focus group timing / requirement – e.g. UFE Workshop 	Monthly	<ul style="list-style-type: none"> Applicable Participant resources e.g., Project Managers AEMO resources 	<ul style="list-style-type: none"> Meeting packs and notes distributed to mailing list and published to AEMO's website
Transition Focus Group	<ul style="list-style-type: none"> Determine and manage the discrete activities in the May 2022 transition plan, including: <ul style="list-style-type: none"> Agreed approaches/mechanisms (including MSDR, GS, 5-minute meter activation) Timings on activity (participant and AEMO) Procedure interaction Other considerations e.g., CR volume management 	More often in the early stages, then as required	<ul style="list-style-type: none"> Analysts, SMEs, etc. 	<ul style="list-style-type: none"> Transition plan Guides Position clarifications Consolidated rollout volumes
Industry Testing Focus Group	<ul style="list-style-type: none"> Scope, plan, coordinate and execute Market trial/Industry testing 	Monthly from Jan/Feb 22	<ul style="list-style-type: none"> Test managers, Test Analysts 	<ul style="list-style-type: none"> Test plan Test cases Test data
Specialist Workshops	<ul style="list-style-type: none"> Discuss and consider key concepts and/or implications associated to a specific topic e.g.: <ul style="list-style-type: none"> UFE settlement, reporting and management <ul style="list-style-type: none"> Concepts and mechanics Obligations, Participant and AEMO 	As required	<ul style="list-style-type: none"> Participant and AEMO SMEs 	<ul style="list-style-type: none"> Content and meeting packs available prior to session, notes and other artefacts distributed to mailing list and published to AEMO's website
Dedicated mailbox	<ul style="list-style-type: none"> Provides a single point of contact to AEMO re the program <ul style="list-style-type: none"> Connect participants with the correct AEMO representative to assist with questions or suggestions 	Working days/ Best efforts response	<ul style="list-style-type: none"> As required 	<ul style="list-style-type: none"> Distribution of program information Two-way exchange of information/feedback Confidential email exchanges between AEMO and participants
One-on-one meetings	<ul style="list-style-type: none"> Provide: <ul style="list-style-type: none"> An opportunity for Participants to raise specific matters with AEMO confidentially AEMO an opportunity to understand Participant Readiness 	As requested/required	<ul style="list-style-type: none"> Applicable Participant resources and AEMO 	<ul style="list-style-type: none"> Confidential discussion
Q&A Sessions	To ensure Participants have an opportunity to ask questions as required	TBD		

Indicative Topic Schedule – RWG & TFG

Month	RWG	Transition Focus Group	Industry Testing Focus Group
November	<ul style="list-style-type: none"> • Scope and governance confirmation • Plan on a page/Milestone review • Discuss key dependencies, risks and issues 	<ul style="list-style-type: none"> • Develop and consolidate Transition Plan activities 	N/A
December	<ul style="list-style-type: none"> • Confirmation of key risks, issues and dependencies • Progress updates 	<ul style="list-style-type: none"> • Finalise the initial version of the Transition Plan 	N/A
January	<ul style="list-style-type: none"> • Review milestone progress • Review and endorse Transition Plan • Establish Industry Testing Focus Group 	<ul style="list-style-type: none"> • Monitor, manage and execute transition plan activities • Discuss key items 	N/A
February	<ul style="list-style-type: none"> • Review milestone progress, risks and issues • Discuss key topics • Consider escalating items 	<ul style="list-style-type: none"> • Monitor, manage and execute transition plan activities • Discuss key items • Develop the Industry Go-Live Plan 	<ul style="list-style-type: none"> • Develop Test Strategy/Plan
March	<ul style="list-style-type: none"> • Review milestone and transition plan progress • Review risk and issues • Discuss the proposed Industry Go-Live Plan • Review and endorse Release Test Strategy/Plan 	<ul style="list-style-type: none"> • Monitor, manage and execute transition plan activities • Discuss key items • Finalise Go-Live Planning 	<ul style="list-style-type: none"> • Conduct participant testing
April	<ul style="list-style-type: none"> • Review milestone and transition plan progress • Receive Industry Testing Planning Update • Finalise Industry Go-Live Plan 	<ul style="list-style-type: none"> • Monitor, manage and execute transition plan activities • Discuss key items • Prepare for go-live 	<ul style="list-style-type: none"> • Complete participant testing
May	Go Live		

Note, this table provides an initial indication of the draft topic schedule, for discussion. This schedule is under development and will continue to evolve over the course of the program.

Feedback from previous PCF

The following points of feedback were captured in the PCF #37 meeting notes and have been taken into consideration when developing the approach to GS/MSDR governance:

- **Bundling Risk:** this is a key risk and is under investigation. GS commencement date is governed by NER and AEMO is discussing mitigation measures to ensure that this date can be delivered with minimised risk.
- **CR volumes:** propose this will be included in the transition plan and discussed through TFG
- **Schema definition** – a request from a number of participants for the updated schema definition to be released as early as possible. MSDR is planning for a draft to be released for the ASWG consultation process on 22 Oct
- **Parallel project governance:** reflected in governance structure
- **Integrated Market Trial:** Changes that are due to be delivered on 1 May will be tested through a consolidated Market Trial Plan. Indicative commencement date is 28 March. Plan on a page will be provided at first May 22 RWG.
- **Working group structure (incl. UFE Focus Group):** feedback has been reflected in the governance structure

Next Steps

- Feedback received to date confirms that the overall approach is acceptable
- Specific topics for discussion have been raised and will be covered through the new working group structure – additional feedback is welcome
- AEMO will issue a “call for nominations” email for the new working group and focus groups to the 5MS mailing lists
 - Please coordinate a single response for your organisation by 29 Oct to allow us to establish mailing lists and issue invites for November
- Proposed November dates:
 - UFE Focus Group: 12 Nov 10:00 AEDT
 - May 2022 RWG: 19 Nov 10:00 AEDT
 - Transition Focus Group: 24 Nov 10:00 AEDT



Next Steps

Anne-Marie McCague

Next Steps

- 5MS Program Consultative Forum is now closed
- 5MS & Customer Switching Q&A sessions scheduled will proceed as planned and will be the forum for questions relating to 5MS defects and defect fixes deployments
- 5MS Executive Forum will be scheduled once the PIR timeline is better known
- 5MS/GS website will be adapted for new program focus
- 5MS mailbox will be closed at the end of October. All issues and incidents should be logged with Support Hub
 - General questions can also be logged through Support Hub
- Dedicated mailbox for *May 2022* releases: GSMSDR@aemo.com.au

Questions

Peter Carruthers



Meeting Close

Peter Carruthers