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PERFORMANCE ASSURANCE WEBINAR

05 DECEMBER 2024

INTRODUCING YOUR PRESENTERS

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Jenny Hyskaj

REC Code Manager

Communications and Events Analyst



Anton Moden

Performance Assurance Team

Performance Assurance Lead



Vaishnavi Sharma

Performance Assurance Team

Party Assurance Manager



Rebecca Griffiths

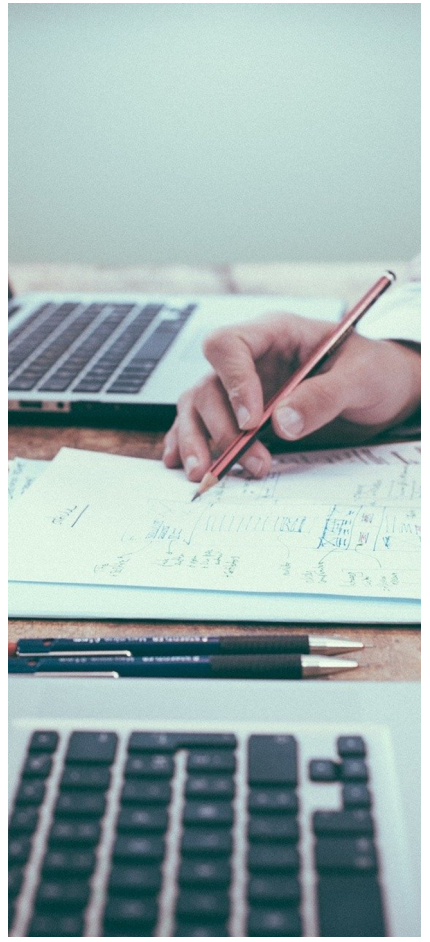
REC Code Manager

Metering Service Delivery Manager

HOUSEKEEPING

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- Videos and microphones
- Event recording
- Use of Slido
- Opportunities for Q&A



slido

TO BE UPDATED

ⓘ Start presenting to display the joining instructions on this slide.

AGENDA FOR TODAY

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TOPIC	TIMING	PRESENTERS
Introduction	12:00 – 12:05 (5 mins)	**Anton Moden**
How is the REC improving things for me?	12:05 – 12:35 (30 mins)	**Anton Moden & Rebecca Griffiths**
What do I need to do?	12:35 – 12:50 (15 mins)	**Vaishnavi Sharma**
Do I get the Services I expect for the money I spend on REC Services?	12:50 – 13:00 (10 mins)	**Vaishnavi Sharma**
Q&A	13:00 – 13:30 (30 mins)	**All**

A SIMPLER CHECKLIST

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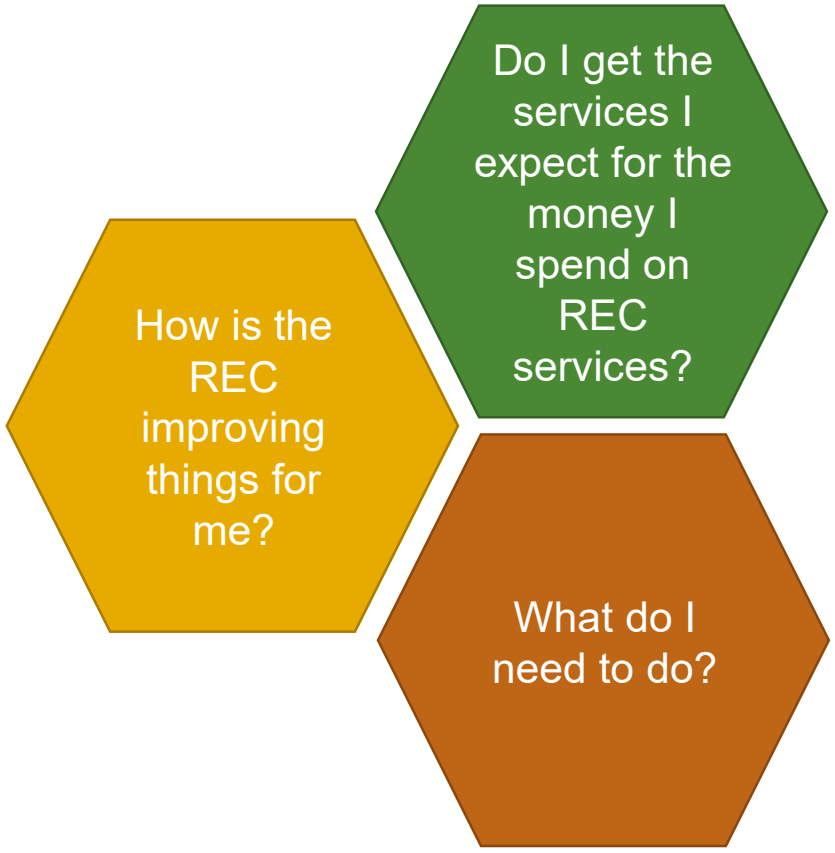
Party Role	Submit monthly data	Review performance dashboards each month	Review / action quarterly PATs	Annual Rating Publication	Data Cleanse 3 in progress	Theft Target Methodology consultation and publication, including targets for next theft year	Party Annual Rating Methodology Consultations	Reporting into PAB on performance
Suppliers								
MEMs								
DNOs								
GTs								
Service Providers								

Each REC Party has a specific Maintenance of Qualification deadline, and may have specific PATs that they need to complete / adhere to.

INTRODUCTION

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- We are structuring our webinar around the 3 key questions that we think REC Service Users have of us.
- Performance Assurance is a complex service – that does many different things with many different types of organisation – we aim to provide you an update on the breadth of this activity.
- We'd welcome your feedback after the webinar if there are other questions you have of us.



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HOW IS THE REC IMPROVING THINGS FOR ME?

WHY IS THIS IMPORTANT

Delivering high quality meter data is a core part of the purpose of the REC. It is essential because:

- It helps consumers with key interactions, including switching, billing, fixing meter issues, etc.
- It's used in key industry processes, including MAP billing and settlement.
- It needs to be shared around the industry – it's not internal data.
- Problems caused by one organisation can both impact and need to be fixed by others. The industry cannot pass problems to others.

Delivering high-quality on-site metering works is essential for multiple reasons:

- The safety of operatives and the public is paramount.
- Providing a consistent framework makes it easier for market participants to interoperate, procure services and generally reduce the overall costs of the market design.

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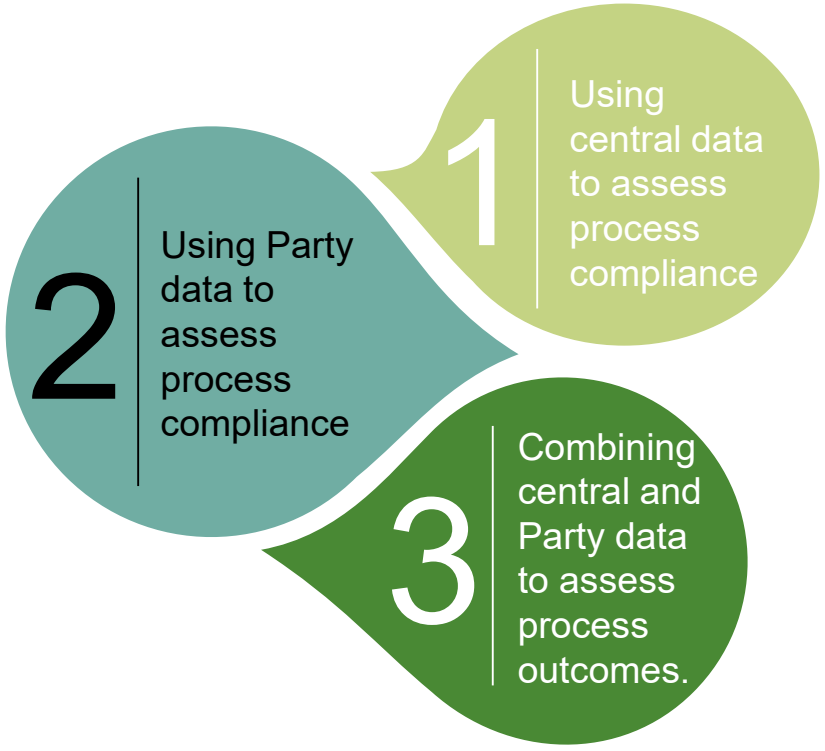
METERING DEEP DIVE

ANTON MODEN

AN OVERVIEW OF THE CURRENT STATE

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- REC's Performance Assurance strategy is intentionally data-led, using central data where possible. This is because:
  - It results in an overall reduction in cost to REC Parties, both for the Code Manager and in responding to information requests.
  - Retail markets are dynamic, and fundamentally about data, data led processes are more adaptable.
- We have had three key activities to assure metering data performance to date:



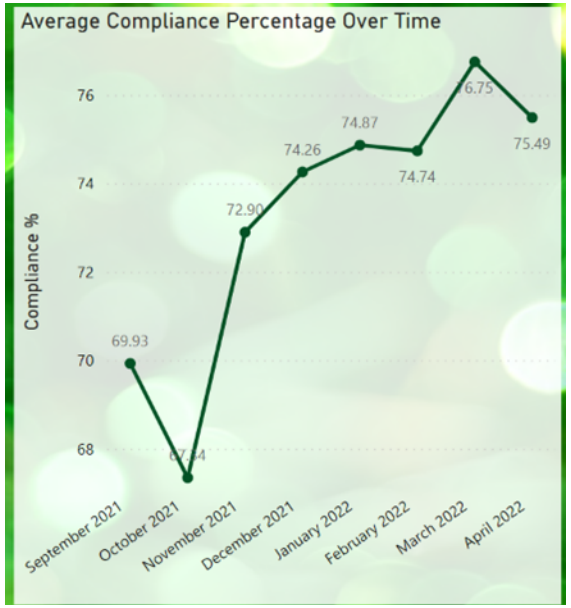
This data assurance is supported by up-front qualification processes, as well as maintenance of qualification and metering audits for those delivering on site works.

WHAT HAS CENTRAL DATA SHOWN US

- We assessed process compliance using DTN data primarily (with gas MEMs providing some flow data to support this. This covered:

  - Meter Installations
  - Meter Exchanges
  - Smart Meter configuration
  - Energisation
  - Fault Resolution

  } Assessed market and individual party trends



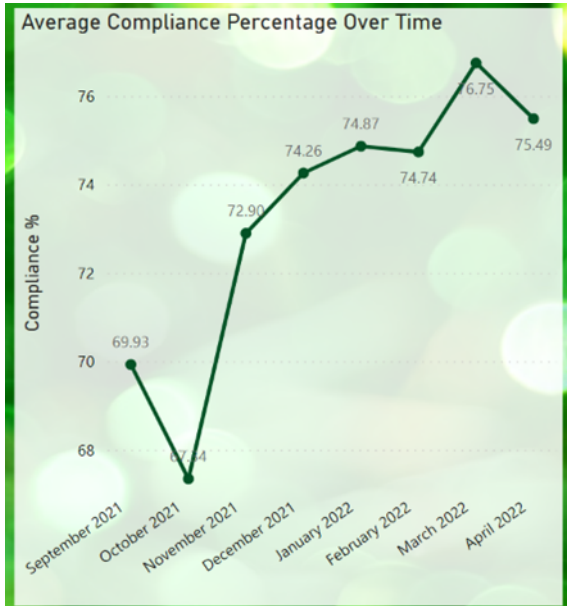
Example market level output

Key Findings:

- Partial compliance.
- Focused on the lowest compliance rates.
- Low compliance rates were primarily attributed to the chosen form of engagement, specifically the optional communication methods.
- Organisations using the DTN for multiple processes demonstrated reasonable compliance.
- Offline responses to DTN processes also showed reasonable compliance.
- The highest risk group consisted of organisations utilising communication methods other than the DTN or offline DTN processes.

WHAT HAS CENTRAL DATA SHOWN US

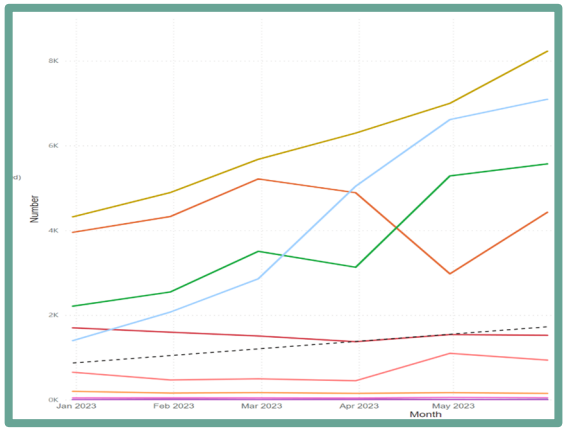
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  - Meter Installations
  - Meter Exchanges
  - Smart Meter configuration
  - Energisation
  - Fault Resolution
- For each of these we assessed market and individual Party trends.
- In each area we found partial compliance and investigated, focusing upon the lowest compliance rates. In most cases we identified that the cause of 'low compliance rates' was the form of engagement, particularly the optionality on how to communicate.
- This showed us that those that use the DTN to intermediate multiple processes did so with reasonable compliance, that those who responded to DTN processes offline had reasonable compliance, but the higher risk population were those organisations that used other communication methods.



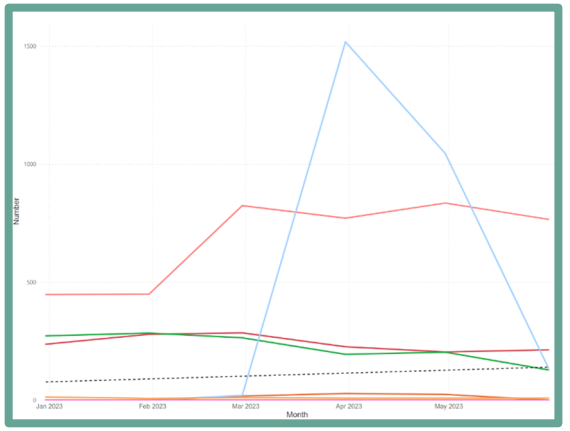
Example market level output

USING PARTY DATA TO MEASURE COMPLIANCE

- To enrich this approach we identified that we needed to obtain performance information from MEMs. This was termed the 'MEM RFI'- designed around the key obligations in the Code.
- A key piece of feedback was that it was challenging for MEMs to report on the actual transactions required in the Code, which led to some MEMs only being able to provide a partial response.
- This covered the ageing of faults and open requests (e.g. responding to requests like ORJOBs).
- This identified outlier organisations with respect to these, with whom we worked to agree rectification plans. Some of the outputs are highlighted in the adjacent charts.



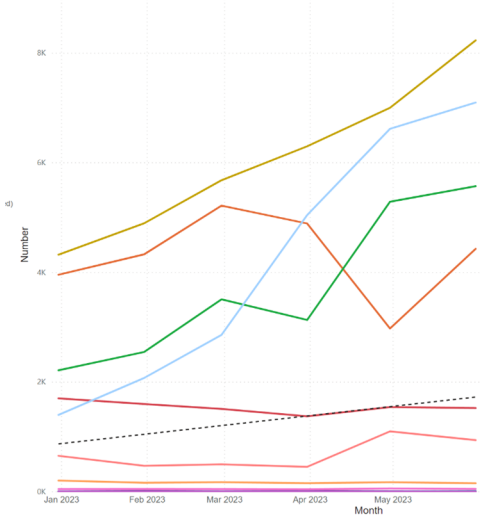
Number of unresolved faults at month end.



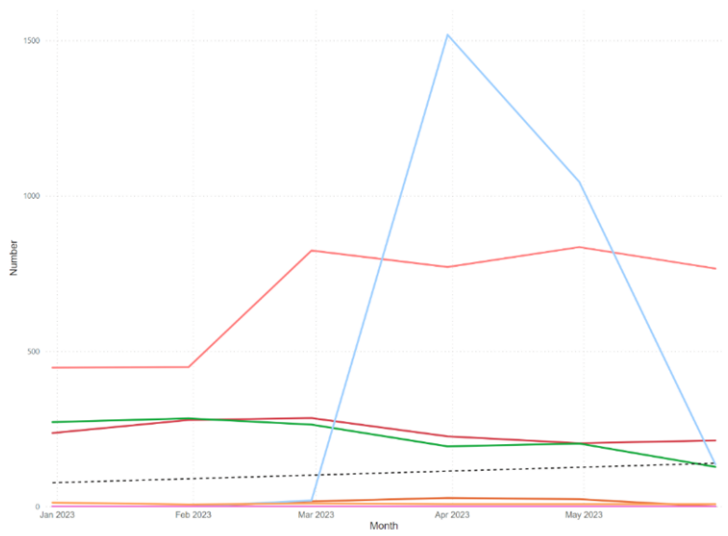
Number unresolved and 51-100 WDs have passed since initial D0001.

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Number of unresolved faults at month end.



Number unresolved and 51-100 WDs have passed since initial D0001.

CDSP RECONCILIATION AND NEXT STEPS

- A further assurance activity in gas came into the REC at CSS go live.

- The CDSP facilitates an annual reconciliation, the outputs of which are reported to the Code Manager. The total number of MPRNs covered by data submitted by MEMs is 19,827,033 out of which 5,776,769 MPRNS (29.4%) had inconsistencies between the meter data maintained by the MEM and within the Central Gas Register.

- We discussed each of the above assurance outputs above with PAB, as they indicate a need for improvement. One crucial element of our findings has been that the Code is structured in such a way that there it does not leave evidence that shows whether organisation have been compliant or not - but there is evidence of poor consumer outcomes.

- We therefore focused on working with industry through a series of MEM working groups to identify the causes of these issues. This highlighted several areas of the Code that needed development, and has strongly influenced our thinking on our metering strategy. We have included as an appendix a brief overview of each of the 4 REC issues raised to tackle this (I0196 – I0198).

WHERE DO WE WANT TO GO NEXT

As a Code Manager we need to first address the things for which we are responsible, whilst maintaining minimum standards.

This must:

1. Improve and consistently digitalise processes. Our work so far has given us the evidence base to get our house in order through the **change process** and **forward work programme**.
2. Establish effective mechanisms to assess data quality in both fuels.
3. Year on year improve the quality of the compliance and assurance. Our current approach has been focused on getting the basics right; we want to work with RECCo to then enhance the gas reconciliation and implement a more mature version in electricity.
4. Broaden the focus – we are working with RECCo to get better access to their data to expand this approach, e.g. to gas MAP ID data.

We include overleaf our high level strategy to achieve this.

WHAT IS OUR FORWARD FACING STRATEGY?

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	Systems	Processes	Compliance & Assurance
	We identified inconsistent use of the communication methods was a contributor to issues – this is being fixed by MHHS but has led to many false positives.	MHHS will improve this, but some gaps remain including relating to faults which we are addressing.	We've seen success with data cleanse and reconciliation activities other areas of the Code, and therefore will focus on following a similar approach in electricity.
	Our work identified inconsistent systems as a key contributor to the poor performance in gas. We have raised REC issues to progress this, but RECCo's digitalisation strategy should be the key vehicle for resolution.	Our work has identified and workshopped design issues with gas processes. These are going through the change process.	We are tackling organisations that don't participate in the CDSP reconciliation and setting cleanse plans for those with data quality issues.

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THE IMPACTS OF THE MHHS DELAY

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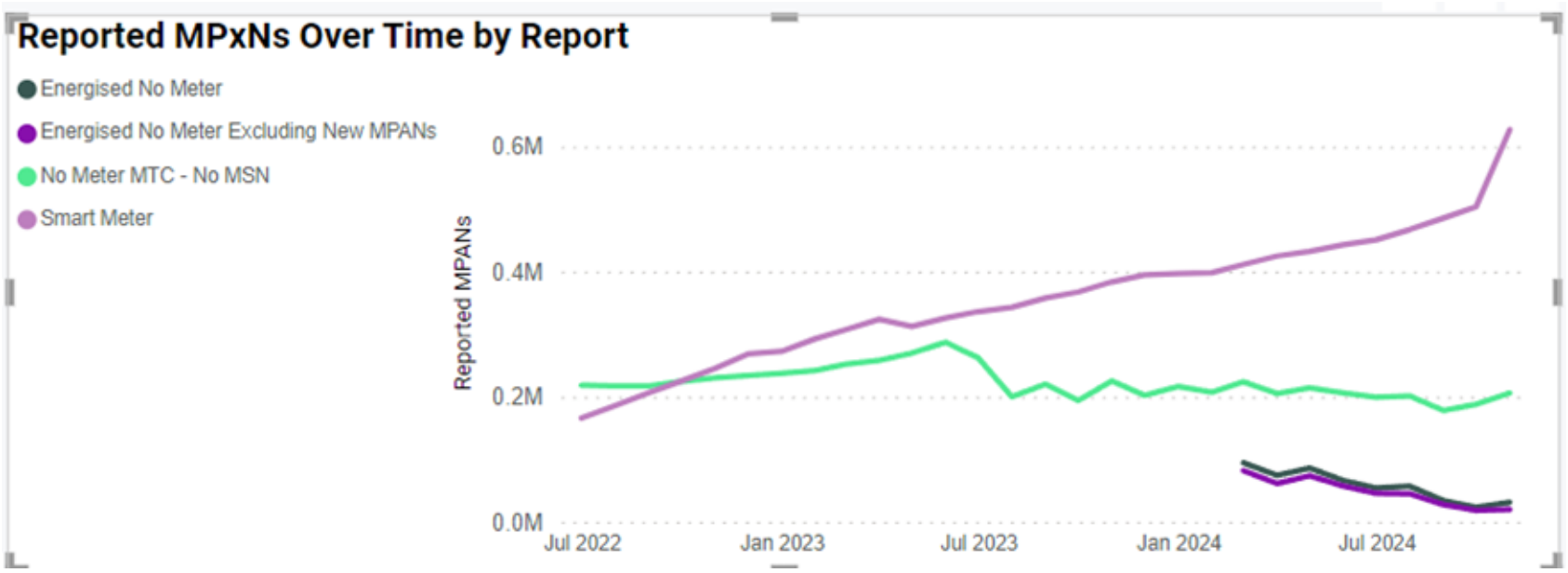
- Our metering strategy in electricity has been developed in the context of MHHS process change and data cleanse. Following the delay to the MHHS Programme we have had to revisit our approach.
- The PAB continues to support a focus on outcomes – including accurate MTDs. Our initial plan was to reconcile MTD data held by MEMs with SMRS data. Given the delays we will continue with the reconciliation approach, first reconciling to EES (which has a similar data set to SMRS) and updating to SMRS later if this is beneficial.
- This has the following benefits:

1. Assurance and improvement (where necessary) are not delayed by MHHS.
2. If the EES approach is sufficient REC assurance can take place using only REC data. Where it shows a need for more granularity this can be done without Parties making any changes.
3. Party communication and development can be designed around Parties' needs, as they are not directly tied to the MHHS programme.

A KEY PILLAR – OUR DATA CLEANSE STRATEGY

Our focused data cleanse approach has worked within other areas of the Code; giving people the right data, incentives and the right focus has driven results.

We have focused on improving the basics first, this is not “mission accomplished” but building the foundations and getting the first success.



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ON SITE METERING

REBECCA GRIFFITHS

2024/25 FOCUS AND ONGOING ACTIVITIES

In August 2024, RECCo introduced the dedicated Metering Service Delivery Manager (M-SDM). We can already see the benefit of the additional focus on Metering;

- A REC Wiki Article on Metering Entry Assessment Guidance, which gives greater clarity around expectations by collating information from other parts of the REC Portal and including clear timings around the audit schedule, has been published. All communications from Wilcox to new Market Entries will now include this link.
- Wilcox have revised their pre-audit communications in both content and frequency, and in November set expectations with all parties due for Audit in 2025 to indicate when their audit is due.
- A Function Assessment has been completed; reviewing overall KPI effectiveness, and looking at efficiency, reliability, and the potential for scalability, in the changing Metering landscape.
- A deep-dive of the Audit Reporting has not only identified and resolved some minor data inconsistencies, leading to increased confidence in the current reporting and overall KPI's being met, but has also allowed a draft of reporting enhancements to be created. This has been demoed to Wilcock, who have engaged with Audit Form to confirm an enhancement to provide the required detail on all completed Audits. A Change Request is expected to be raised before the end of 2024, to deliver these enhancements as a priority.

The M-SDM's strategic focus for the remainder of 2024/25 is the effectiveness of Metering Audit Services, with key priorities being to continue working with our provider to improve the reporting & insight to deliver meaningful insight, highlighting further opportunities for improvement, and supporting the implementation of R0152.

2025/2026 AND BEYOND

A wider review of the Metering landscape has identified areas outside of Audit that have the potential for improvement; whilst the FY2025/26 Metering Priorities are not yet finalised, we have a greater appreciation of the challenge, which informs our priorities for the future.

- The Metering Audit Survey Link went live in April 2024. Feedback received so far, whilst low in volume, was mainly positive with an average score of 8.85/10. Nonetheless, it highlights where there is still scope for improvement, particularly in the Audit questions.
- We acknowledge the feedback above stems from the current CoMCoP's effectiveness; R0152 is ongoing to address this, and we anticipate a significant revision to the Audit Questions following this. In these revisions, we will not only take the opportunity to ensure alignment with the planned Reporting enhancements, allowing clarity and consistency of data pre- & post-R0152 revisions, but also consider direct feedback from audited-parties.
- Once we are confident R0152 has delivered as expected, we plan to revisit the CoMCoP Accreditation logo; with a view to measured implementation, and usage in a way that aligns to certification status.
- We have also received a significant volume of feedback in relation to the effectiveness of the Safe Isolation Provide (SIP) role, which we will visit in more detail on the following slide.

SAFE ISOLATION PROVIDER (SIP) FOCUS

- In June 2023, the Safe Isolation Provider (SIP) role was introduced into the REC through Change Proposals R0021 & R0101. The objective of these Change Proposals was to streamline the process of de-energising and re-energising supply points, allowing REC-accredited Metering Equipment Managers (MEMs) to perform these tasks independently of Suppliers. This aimed to support the installation of Low & Zero Carbon Technologies, while addressing coordination challenges and delays.
- As part of a suite of improvements to the REC change process, a pilot 'Post-Implementation Review' of R0021 & R0101 was conducted to determine the effectiveness of resolving the original problem statement.
- The Code Manager provided a report to RECCo, which focuses on SIP Implementation, qualification, and participation, as well as the associated REC Changes, and the engagement/communication with industry participants and external stakeholders. Whilst also touching on broader governance issues within the REC and related Change Proposals, it does not provide an exhaustive analysis of other REC changes.
- RECCo and the Code Manager look to progress several key recommendations the report identified, including;
  - Further improvements to the REC Change Process
  - Enhanced Accession advice and guidance
  - Engagement with Trade Bodies, Other Code Bodies and DESNZ

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INTERACTIVE SESSIONS

INTERACTIVE SESSION PREPARATION

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- We intend on discussing this information at the Performance Assurance webinar, where we will include three short interactive sessions. To support Parties prepare we have summarised below the key questions we intend on addressing:

- Session 1: what are the priorities RECCo and the Code Manager should have for improving MEM arrangements and performance? This will use the categories overleaf.
- Session 2: How can we better engage MEMs in the assurance activity to make it overall more valuable (both data and on-site assurance)?
- Session 3: What future industry trends will mean that the Code or the assurance need to change to adapt to the new market place?

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WHERE SHOULD REC EFFORTS BE PRIORITISED?

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Safety	Back office processes	Faults	Updates from non-supplier appointed MEM
Quality of MTDs	Sharing information quickly on a metering event (install, exchange, removal etc.)	Change of Agent	Flow data ‘lost in the process’
Data exchange systems to facilitate metering processes (DTN / DIP / IX)	Accreditation – level of assurance	Accreditation – administration process	Level of guidance available

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WHAT HAVE WE ACHIEVED THIS QUARTER

THIS QUARTER 2024

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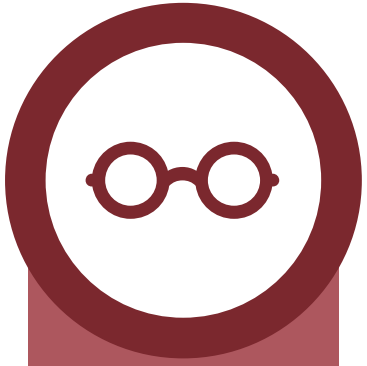


Data Cleanse Sprint



PAB Papers

Market Scheme assurance
Improving Market Entry documentation
PA documentation
Data access requests



Quarterly PATs

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PRIORITIES FOR THE NEXT QUARTER

ANTON MODEN

PRIORITIES FOR THE NEXT QUARTER

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Theft

Objections

REC Changes

Annual Rating

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WHAT DO I NEED TO DO?

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A PERFORMANCE ASSURANCE DEEP DIVE ON MHHS

VAISHNAVI SHARMA

HOW WOULD I RATE MY KNOWLEDGE OF MHHS?

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Not familiar at all
I have never heard of this topic before.
I wouldn't know where to begin learning about it.

Basic awareness
I've heard of this topic, but I don't know much about it.
I could maybe define a few key changes it introduces for my organisation or I may know whom to go to if I want to understand more.

Some familiarity
I've read a few articles or attended presentations on this topic.
I understand at a high-level what is expected of my organisation, and know who within my organisation is working on MHHS.

Knowledgeable
I am actively working on MHHS and helping my organisation prepare.
I can confidently discuss the key concepts and their implications.

Expert
I have extensive experience and deep knowledge in changes brought by MHHS.
I am confident in my ability to teach others about how to prepare for MHHS.

PLEASE USE SLIDO TO VOTE

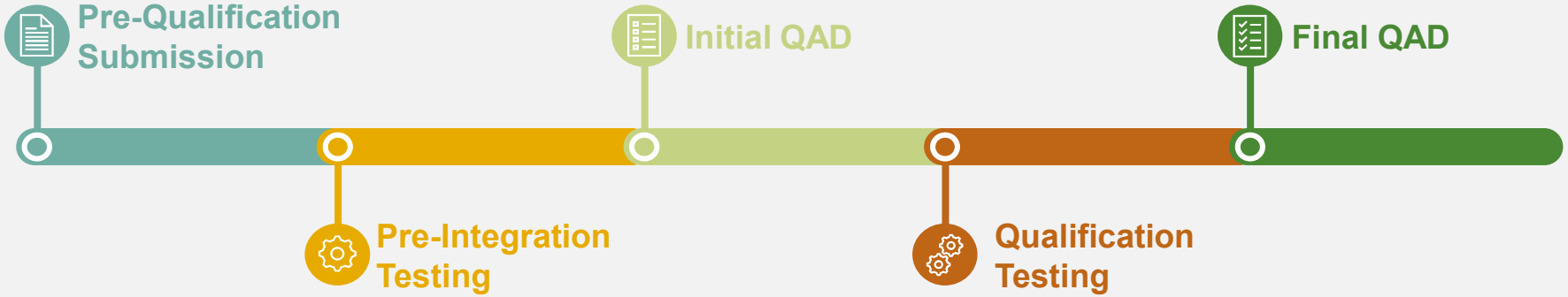
WHAT ARE MY ASSURANCE REQUIREMENTS FOR MHHS?

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Assurance of changes made by legacy Suppliers and Agents to support MHHS transition



MHHS Qualification to check the readiness of Party to operate in the new arrangements



Enduring Performance Assurance

New items based on reports from DIP will be added to our risk monitoring and performance reporting. Performance Assurance Techniques (PATs) will be applied in line with the existing Performance Assurance Methodology.

WHAT WILL LEGACY ASSURANCE FOCUS ON?

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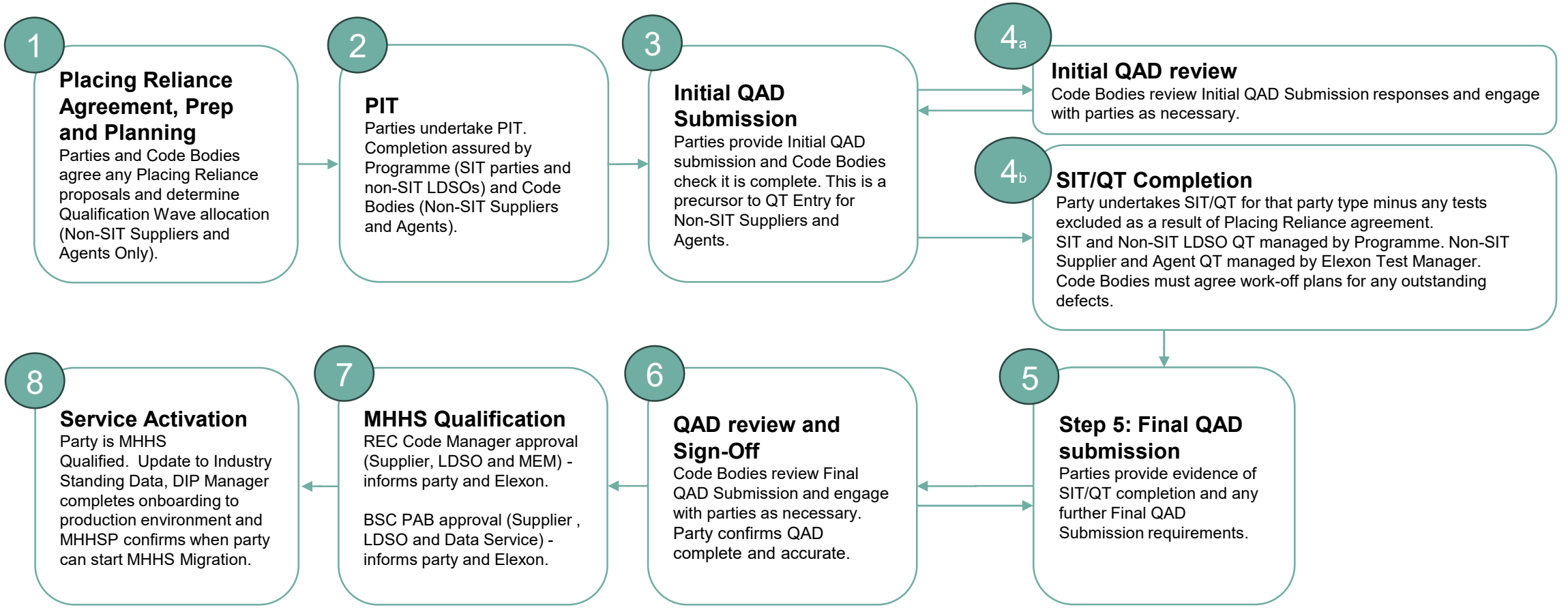
This applies to Supplier and Meter Operator Agents who are currently live in the market but will not be MHHS Qualified at the point of MHHS cutover. These parties must make the following changes in line with the MHHS Programme plan to support transition to the new arrangements.

- Supporting **Forward and Reverse migration processes**
- Changes to REC-owned **DTC Market Messages**
    - Data item amendments, additions, two new flow versions
    - New Scenario Variants to reflect new Market Segments
    - Test flows already available via ElectraLink
- **R0083 - Changes to Supply Number Format for MHHS**
    - The new format:
        - Retains the Profile Class Id
        - Replaces Meter Time switch Code (MTC) with Standard Settlement Configuration (SSC) Id
        - Replaces Line Loss Factor Configuration (LLFC) Id with DUoS Tariff Id
    - Implementation at MHHS go-live (M8), for all MPANs, including use of new format in all bills or annual statements
    - Approved legal text
- **Electricity Enquiry Service** GUI and API changes. Please ensure you have reviewed the updated API output and implemented changes, where required, to your reporting systems.

Please refer to the recording of the **18 July 2024 Webinar: Countdown to Market-Wide Half-Hourly Settlement: Key Steps to REC Compliance** for more detail on all of impact of MHHS Programme on your REC obligation.

WHAT ARE THE MHHS QUALIFICATION STEPS?

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For more detail, please refer to the Qualification Approach and Plan on the MHHS Collaboration Base.

WHAT DOES A NEW ENTRANT NEED TO DO ADDITIONALLY?

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Market Entry Date				
Requirement	Before M11/12	M11/12 to M14		After M14
		Supplier/MOA	DNO	
REC BSA	✓	✓	✓	✓
REC Market Scenario Testing (Legacy Arrangements)	✓	Choice	✓	
REC Market Scenario Testing (MHHS Arrangements)		✓ Significantly Reduced Scope	✓ Significantly Reduced Scope	✓
MHHS Programme Qualification	✓	✓	✓	
DIP Manager Testing				✓ Arrangements TBC

HOW DOES MHHS PROGRAMME RE-CALIBRATION UNDER CR055 IMPACT ME?

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- MHHS Programme Change Request CR055: Amendments to M10 and corresponding Milestones proposes changes to the MHHS Programme Plan and its Tier 1 milestones.
- Programme milestone M10, which is for Central Systems to be ready for migrating MPANs was proposed to be deferred by c. 5 months from the baselined date of 07 March 2025 to 13 August 2025 based on current progress of the System Integration Testing (SIT). Similarly, other Programme milestones linked with M10 are proposed to be deferred by c. 5 months.
- The Programme sought feedback from Programme participants on the changes proposed via the impact assessment which closed on 04 October 2024. Following this, on 15 October 2024, the MHHS Programme Change Board made a recommendation to the Senior Responsible Owner to further extend M10 by 6 weeks to 24 September 2025. This recommendation was approved by the Programme Steering Group (PSG) on 18 October 2024.
- Due to the nature of this change i.e. the length of delay, approval from the Programme Sponsor (Ofgem) is required before it can be implemented. The current proposal is under consideration by Ofgem but not yet endorsed.
- In its proposal, the MHHS Programme also retains the 3-month contingency window for M10 that was built into the original Programme Plan. This allows M10 and other corresponding milestones to move forward or backward by c. 6.5 weeks. A decision point is planned for c. 6 months before the planned date for M10 (in February 2025) to confirm the planned date for M10.

MHHS PROGRAMME RE-CALIBRATION UNDER CR055

- The changes proposed by CR055 impact the timelines planned for MHHS Qualification which is being jointly delivered by BSCCo and the REC Code Manager. As a result, the Qualification Approach and Plan (QA&P) and its Annexes which have been baselined in the recent months following approval by the BSC and REC PABs, will need to be reviewed and amended.
- While the changes will not be implemented until approved by the Authority, to support market participants to adjust their MHHS delivery plans, the Code Bodies have reviewed the recommendation made by the MHHS PSG as part of CR055 to Ofgem and advise market participants on proposed dates for Qualification activities during the Qualification Working Group (QWG) meeting on 12 November.

For more detail, please refer to the papers for QWG28. High-level dates to be aware of are listed below:

Wave #	Initial Qualification Assessment Document Submission Window	Qualification Testing (QT) Execution Window	QAD Sign-off Deadline
Wave 1	05/05/25	25/08/25	13/03/26
Wave 2	09/06/25	20/10/25	20/04/26
Wave 3	11/08/25	05/01/26	26/06/26
Wave 4	20/10/25	02/03/26	21/08/26

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DO I GET THE SERVICES I EXPECT FOR THE MONEY I SPEND ON REC SERVICES?

WHAT ARE YOUR THOUGHTS ON THE REC SERVICES YOU RECEIVED IN THE LAST QUARTER?

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We intend on discussing this question through an interactive session using Slido.

PLEASE USE SLIDO TO VOTE

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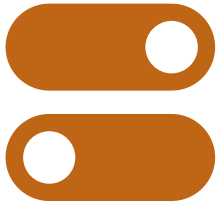
WHAT SERVICE PROVIDER ASSURANCE HAS BEEN HAPPENING THIS QUARTER?

VAISHNAVI SHARMA

PAB INITIATIVES FOCUSSED ON REC SERVICES

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With REC Services demonstrating consistent performance improvement, the Code Manager and Performance Assurance Board have collaborated with Service Providers on the following initiatives over the last quarter to maintain this momentum:



R0092A implemented (better CRS metrics)



Evolution of CRS Performance Charge (R0210)



Increasing accountability through focused PAB deep dives



Review of metrics used to evaluate Service Provider performance



Focus on delivery of changes and transformational programmes



Closing out Major Switching Incident remediation actions

HOW COULD PERFORMANCE ASSURANCE IMPROVE YOUR EXPERIENCE WITH REC SERVICES?

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We intend on discussing this question through an interactive session using Slido.

PLEASE USE SLIDO TO VOTE

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Q & A

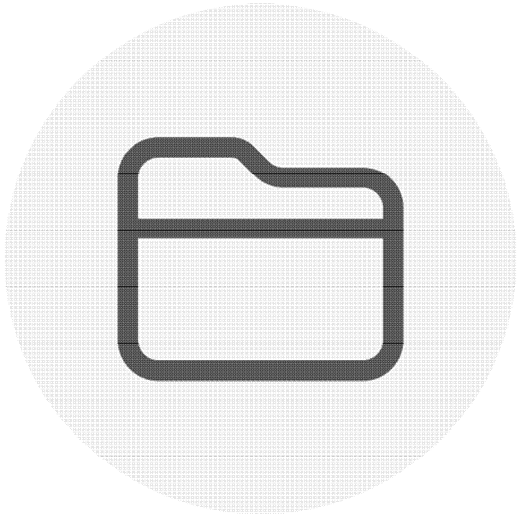
JENNY HYSKAJ

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THANKS FOR ATTENDING

CONTACT US: ENQUIRIES@RECMANAGER.CO.UK

slido



Feedback

ⓘ Start presenting to display the poll results on this slide.

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APPENDIX

SUMMARY OF RELEVANT CHANGES

CURRENT ISSUES THAT HAVE BEEN RAISED VIA REC PORTAL

- I0195 Addition of MEMs to the Gas Enquiry Service (GES) API.
  - This will help support the current issue of when appointed as a MEM by a newly Registered Supplier, there are occasions where details of the previous MEM are either not received or are incorrect on receipt when the current process is followed.
  - For example, frequently Parties are then required to chase for Meter Technical Details (MTDs) or other vital information and currently to acquire the details a MEM must either require the details from the Registered Supplier (often leading to delays) or manually look up the details using the GES Online Portal.
  - This solution would provide MEMs with additional visibility of data and can be used as an efficient means to access the details of the previously appointed MEM themselves utilising the API.

CURRENT ISSUES THAT HAVE BEEN RAISED VIA REC PORTAL

- I0196 Requiring the Supplier/Shipper to validate and enrich the data from the MEM prior to updating this in CDSP - REC Portal
  - This will help support inaccurate information being updated in the CDSP.
  - For example, if the Supplier sends an ONAGE flow which is then rejected by the MEM for various reasons. At this point usually the Supplier has already updated the Shipper and thus CDSP as if the flow has been accepted. This then causes inaccuracies within CDSP and could be mitigated if there was a check in place for the Supplier to confirm if a rejection occurred from the MEM.

CURRENT ISSUES THAT HAVE BEEN RAISED VIA REC PORTAL

- I0197 Introducing a process to provide updates during fault resolutions

  - We are aware that some customers have had faulty meters for a prolonged period, which impacts billing and settlement, and can prevent customers accessing specific tariffs. Currently the REC only has obligations relating to electricity meter faults, and these don't require work to be done to address faults.

  - Here we suggest that we will raise a REC Change Proposal to introduce a maximum timeframe Fault Resolution deadline. We acknowledge that fault resolution can be challenging, for example when the customer will not permit access to the property, so understand that any obligations need to be constructed thoughtfully.

  - To support this change further, we would be interested in including a process in the REC to enable exceptions to be raised to Supplier and Code Manager, which would enhance visibility for MEM compliance under the Code.

  - We believe this issue impacts both electricity and gas and would therefore assume that any change in this space would be dual fuel.

CURRENT ISSUES THAT HAVE BEEN RAISED VIA REC PORTAL

- I0198 Move towards a single interface to be mandatory for key market messages to be sent via.

1. This will help support and improve communication channels to reduce missing messages and rejections not being worked whilst developing the process for customer appointed MEMs and ultimately simplify.

2. This solution was proposed given that various methods (DTN, IX and emails) are used in the market for organisations to communicate with one another, however, the variability in methods can cause confusion and a high risk of missing messages.

3. Even though there are standard formats which the industry should send the data flows, the DTN itself does not currently provide validation on the gateway. This means that if an organisation sends information via the DTN gateway then they do not have to send a standard format and often results in rejections, as recipient identifies the message is invalid when it enters their system.

4. On the other hand, the IX method does provide some validation and validates the information. This means that there could be an opportunity here to remove the DTN (which will inevitably happen as a result from MHHS) and enhance the IX to allow that one point of contact for all organisations. Here the principle wouldn't change the gateways remain the same, but it potentially be a quicker and simpler method.