RETAIL ENERGY CODE

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CHANGE PROPOSAL EXTENSION TO PLAN

R0252 – Increasing Frequency of Annual Portfolio Reconciliation Exercise to Support Data Cleanse

DOCUMENT VERSION	V4.0
PROPOSED IMPLEMENTATION DATE	TBD
IMPLEMENTATION APPROACH	Big Bang

RESPONSIBLE COMMITTEE	Metering Expert Panel	**CHANGE PATH**	Self-Governance
PRIORITY STATUS	Low	**URGENCY**	Standard
IMPACTED STAKEHOLDERS	MAMs, CDSP, REC Performance Assurance		

LEAD ANALYST (SOLUTION LEAD)	ASSURANCE LEAD	SUBJECT MATTER EXPERT
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1 CHANGE OVERVIEW

Every year in April, Metering Asset Managers (MAMs) are required by REC Schedule 14 – Metering Operations to submit selected Data Items for each Metering Asset in their portfolio to the Central Data Service Provider (CDSP) for the purposes of a reconciliation.

The CDSP compares the Data Items submitted by the MAM to their own copies of these Data Items for any given Metering Asset, and in this way, discrepancies are identified. These discrepancies are then reported to the REC Performance Assurance team, who work with MAMs to resolve them.

The Proposer has identified two issues with this process. Firstly, the reconciliation exercise is not frequent enough, taking place only once a year. They have asked the Code Manager to explore the possibility of increasing the frequency to twice yearly. Secondly, the turnaround time of the reconciliation data by the CDSP currently takes several months – MAMs historically have received the reconciled data set between August and October. The Proposer has asked the Code Manager to explore reducing this turnaround time.

2 CHANGE PLAN UPDATE

		Previous		Proposed	
Milestone	**Activity**	**From**	**From**	**From**	**From**
Definition		**13 May 25**	**07 Apr 26**	**13 May 25**	**30 Jul 26**
	Solution Analysis	May	Complete	Complete	Complete
	Solution Development	December	Complete	Complete	Complete
	Legal Drafting	January	Complete	Complete	Complete
	Impact Assessment	February	Complete	July	July
Change Proposal		**08 Apr 26**	**09 Jun 26**	**31 Jul 26**	**13 Oct 26**
	Business Case Assessment	April	April	August	August
	Consultation	April	June	August	September
	Solution Refinement	May	June	September	September
	Final Determination	May	June	October	October
Voting		**13 May 26**	**10 Jun 26**	**14 Oct 26**	**14 Oct 26**
	Appeal Window	May	June	October	October

This solution will involve asking the CDSP to reduce the timescales over which they conduct the reconciliation exercise, coupled with a more robust Performance Assurance approach for MAMs in respect of their data submission.

The Service Provider impact assessment has been completed, and within their response the CDSP have informed the Code Manager that they can deliver the report in 40WDs, assuming that REC Performance Assurance take a more robust approach to ensuring that MAMs abide by their 15WD data submission obligation.

The Code Manager has engaged with RECCo and REC Performance Assurance in order to produce an assurance solution that can provide the CDSP with confidence that MAMs will submit their data within established timelines. Conversations surrounding the assurance solution have taken longer than anticipated, and now it has become apparent that a series of new Service Provider Impact Assessments (aimed at RPA and RPS) will be required, followed by a further assessment of the business case.

The Code Manager expects to be able to resolve these Impact Assessments by early July, and then resolve the business case assessment shortly after. The Code Manager will then present the package of work to the REC Metering Expert Panel at their August meeting, and publish a consultation shortly after. A final vote will then be taken at the October REC Metering Expert Panel.

3 COMMITTEE ACTIONS

Committee Members are invited to take the following actions:

- **REVIEW** the extension to plan for R0252; and
- **APPROVE** the extension to plan for R0252.