

# NEM Reform Implementation Forum

Meeting #20  
26 March 2024



# 1. Welcome

We acknowledge the Traditional Owners of country throughout Australia and recognise their continuing connection to land, waters and culture.

**We pay respect to their Elders past, present and emerging.**

## 2. Actions & Feedback from Previous Meeting

# Agenda

#	Time	Topic	Presenter
1	1:00–1:05pm	<b>Welcome</b>	Greg Minney
2	1:05–1:10pm	<b>Actions &amp; Feedback from Previous Meeting</b>	Greg Minney
3	1:10–1:20pm	<b>2024 / 2025 Release Summary</b>	Greg Minney
4	1:20–1:35pm	<b>Pre-production Availability</b> <ul style="list-style-type: none"> <li>• Lifecycle</li> <li>• Upcoming</li> </ul>	Chris Fleming
5	1:35–2:00pm	<b>June 2024 Release</b> <ol style="list-style-type: none"> <li>1. Release update</li> <li>2. Market trial – ITWG Engagement</li> <li>3. Readiness engagement (BDU Transition)</li> <li>4. Walkthrough of Go-Live approach</li> </ol>	Emily Brodie Greg Minney, Chris Fleming

#	Time	Topic	Presenter
6	2:00–2:20pm	<b>September 2024 Release</b> <ul style="list-style-type: none"> <li>• Retail Improvements – Progress Update</li> <li>• Upcoming Milestones</li> </ul>	Greg Minney / Dylan Volkhardt
7	2:20–2:30pm	<b>December 2024 Release / June 2025 FPP Release</b> <ul style="list-style-type: none"> <li>• Progress Summary</li> <li>• Go Live criteria</li> </ul>	Oliver Derum Karen Wilbrink
8	2:30–2:40pm	<b>Other Initiatives</b> <ul style="list-style-type: none"> <li>• IDAM,IDX &amp; Portal Consolidation Business Case Process</li> <li>• Unlocking CER Benefits through Flexible Trading – HLID/PIA approach</li> </ul>	• Paul Johnson • Greg Minney
9	N/A	<b>Stakeholder Engagement</b> <ul style="list-style-type: none"> <li>• Upcoming Engagements</li> </ul>	David Reynolds
10	2:40–3:00pm	<b>General Questions &amp; Other Business</b>	Greg Minney

**Appendix A:**  
Competition law meeting protocol and AEMO forum expectations

*“Please note that this meeting will be recorded by AEMO and may be accessed and used by AEMO for the purpose of compiling minutes. By attending the meeting, you consent to AEMO recording the meeting and using the record for this purpose. No other recording of the meeting is permitted”*

# Actions

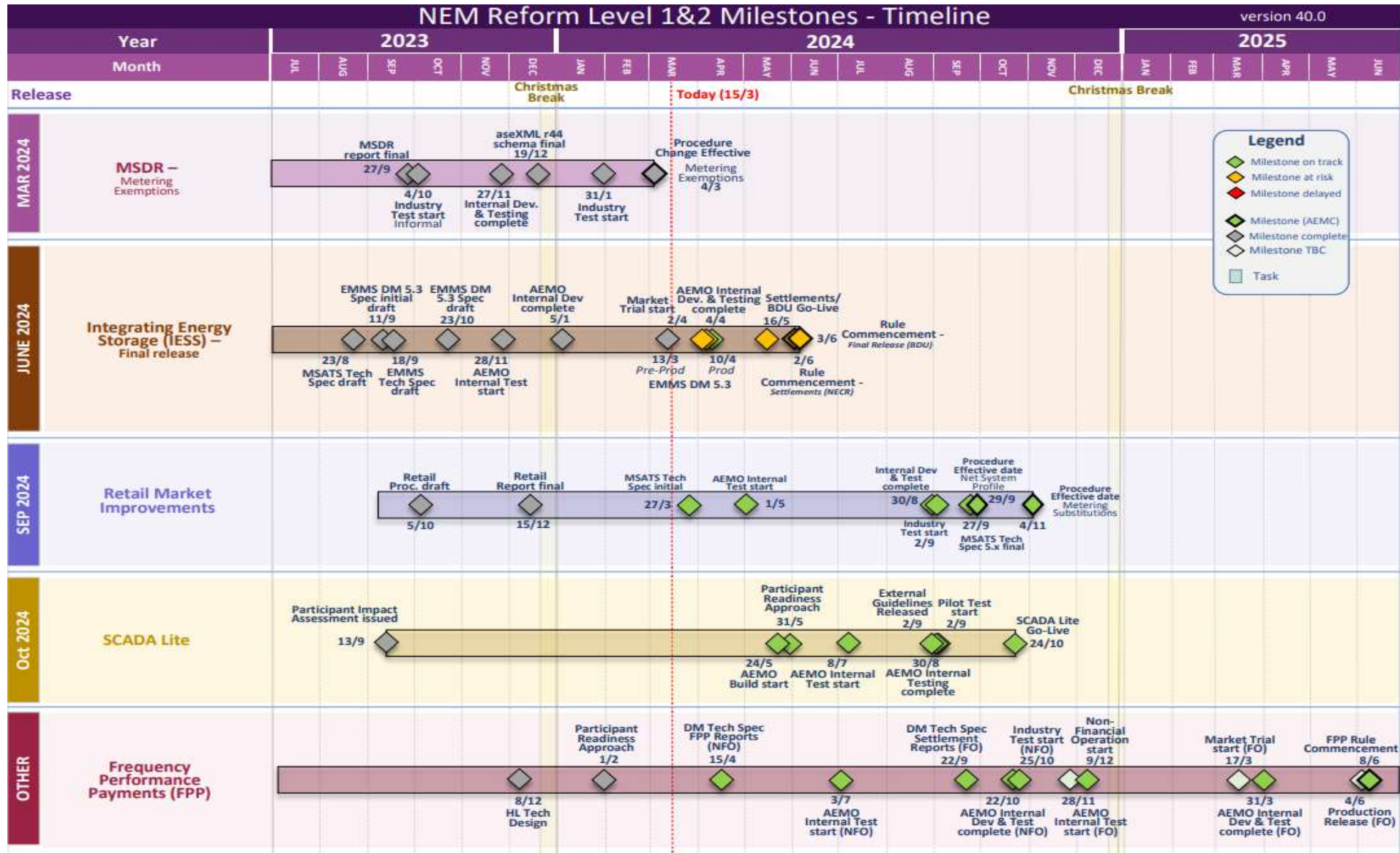
(Item = Meeting # – Agenda # – Reference)

Item	Topic	Action	Responsible	Status
19.6.0.1	June 2024 Release - Readiness documentation and engagement	Participants to provide feedback on the content outlined in the draft IESS Go-Live plan by emailing <a href="mailto:NEMReform@aemo.com.au">NEMReform@aemo.com.au</a> by Monday 18 March.	Participants	Closed  Summary included in agenda item
19.9.0.1	December 2024 / June 2025 FPP Release – Industry Readiness Approach and Go-Live Criteria	Participants to provide feedback on the content outlined Go-Live criteria by emailing <a href="mailto:FPPconsultations@aemo.com.au">FPPconsultations@aemo.com.au</a> by 28 February 2024.	Participants	Closed

The latest meeting minutes and materials are available on the [Implementation Forum](#) webpage.

# 3. 2024 / 2025 Release Summary

# Release Summary milestones





# 4. Pre-Production Availability

# Pre-Prod Refresh for Market Trial

## Proposed Dates and outage Timings

- March Pre-prod Wholesale and Retail refresh completed on schedule.
  - Pre-prod Wholesale refreshed from production as at 7<sup>th</sup> February.
  - Preprod Retail refreshed from production as at 4<sup>th</sup> March.
  - Several settlement runs will be re executed in MSATS during the Market Trial preparations to align the data in the Wholesale system.
- Further outage planned for late March to enable critical infrastructure updates Time and dates are TBC but will be communicated via standard AEMO market notifications.
- Next pre-prod refresh is scheduled for 1<sup>st</sup> July to 5<sup>th</sup> July to support the September 2024 release (Retail refresh only).

# 5. June 2024 Release



# Integrating Energy Storage Systems into the NEM

Emily Brodie / Greg Minney/ Chris Fleming

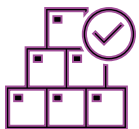
# IESS June 2024 updates



1. Release update & milestone review



2. Market trial planning – ITWG engagement



3. Readiness engagement



4. Walkthrough of go-live approach

# 1. Release update & milestone review

Greg Minney

# 1. Release update



## RELEASE COMMENTARY

- **Overall project status** is rated **AMBER**. This recognises no schedule contingency for complex AEMO delivery program. Interim milestones and progress will continue to be tightly managed against go-live criteria.
- **AEMO internal testing** underway with issues being managed against tight overall schedule, with major focus on scheduling components. Completion Milestone AMBER – managing progress and issue resolution in-line with market trial deployment timeframes.
- **AEMO readiness for Market Trial** is AMBER due to dependency on Internal Test completion and required environment preparation for pre-prod. Pre-prod refresh complete. Application deployment of required capability complete, Defect Release for scheduling prior execution. Data Model released to pre-prod
- **Procedure consultations** in progress via EWCF/ ERCF, on track Only remaining are minor and administrative.

### Tech specs on track:

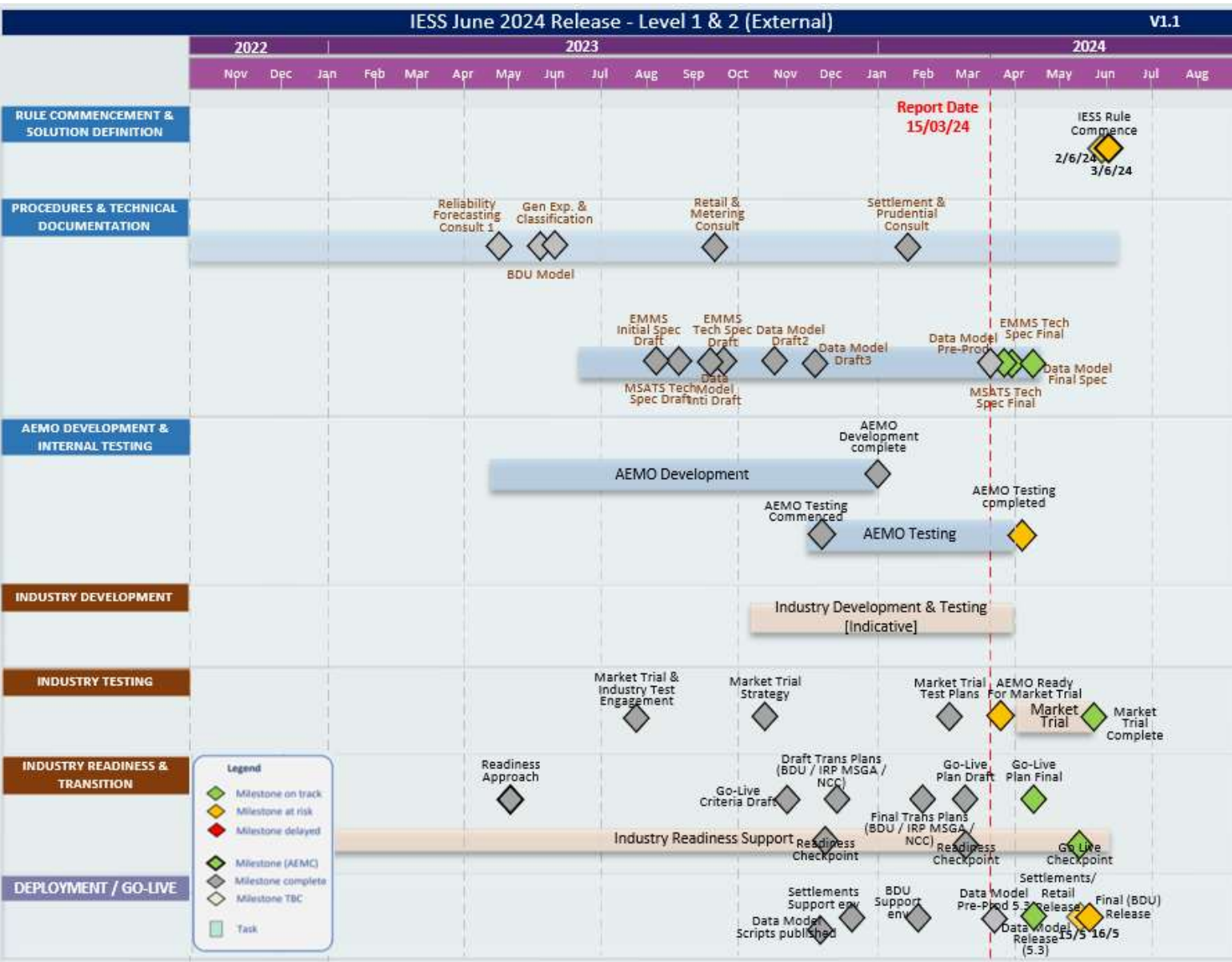
- Latest Tech Spec and Data Model updates align with pre-prod release for Data Model 5.3 (Wed 13 Mar). Further releases for issue resolution only

### Industry testing:

- PDSE/Market Trial weekly Q&A sessions in place
- ITWG members to consider detailed test scenarios for their organisations (Feb/Mar)
- Registrations received from intending participants

### Industry readiness:

- 3x IESS transition plans – finals published Wed 31 Jan.
- Finalisation of BDU Transition timings in progress via individual participant discussions
- Industry go-live plan to be finalised considering participant feedback
- 3-month go-live checkpoint held at PCF, further checkpoint early May.



# IESS June Milestone Table - Past



## IESS Project - Level 1 & 2 Milestones (External)

Level	Milestone ID	Milestone	Target Date	Expected Date	RAG	Tentative / Confirmed
Level 1	IES-100	AEMC Final Determination Published (Integrating energy storage systems into the NEM)	2-Dec-2021	2-Dec-2021	Complete	
Level 2	IES-110	IESS High level Design final	7-Jul-2022	7-Jul-2022	Complete	
	IES-210	Reliability Forecasting Consultation 1	28-Apr-2023	28-Apr-2023	Complete	
Level 1	IES-120	BDU Model Finalised	31-May-2023	31-May-2023	Complete	
Level 2	IES-211	Guide to Gen. Exp. & Classification - Final documents published	1-Jun-2023	1-Jun-2023	Complete	
	IES-300	MSATS Technical Specification draft available	7-Aug-2023	23-Aug-2023	Complete	
Level 2	IES-301	EMMS Data Model 5.3 specification - Initial Draft	11-Sep-2023	11-Sep-2023	Complete	
	IES-302	EMMS June 24 Technical Specification (Draft)	18-Sep-2023	18-Sep-2023	Complete	
	IES-213	Retail Metering Procedures Final Published	18-Sep-2023	18-Sep-2023	Complete	
	IES-303	Industry Test and Market Trials Strategy Draft published	22-Sep-2023	22-Sep-2023	Complete	
	IES-304	EMMS Data Model 5.3 specification - Draft 2	9-Oct-2023	23-Oct-2023	Complete	
	IES-305	Industry Test and Market Trials Strategy complete	17-Oct-2023	17-Oct-2023	Complete	
Level 2	IES-306	Go-Live Criteria draft/establish	30-Oct-2023	30-Oct-2023	Complete	
Level 2	IES-307	EMMS Data Model 5.3 specification - Draft 3	13-Nov-2023	20-Nov-2023	Complete	
	IES-308	AEMO Internal Testing commenced	20-Nov-2023	28-Nov-2023	Complete	
	IES-309	Draft Data Model 5.3 scripts published	22-Nov-2023	22-Nov-2023	Complete	
	IES-310	Initiative Readiness Checkpoint	28-Nov-2023	28-Nov-2023	Complete	
	IES-311	Transition Plan Draft (BDU / IRP MSGA / NCC)	15-Dec-2023	1-Dec-2023	Complete	
	IES-312	Settlements Participant Support Environment available	15-Dec-2023	15-Dec-2023	Complete	
	IES-217	AEMO Development complete	22-Dec-2023	5-Jan-2024	Complete	
	IES-313	BDU Participant Development Support Environment available	22-Jan-2024	24-Jan-2024	Complete	Confirmed
	IES-314	Settlements & Prudentials Procedures published	29-Jan-2024	25-Jan-2024	Complete	Confirmed
	IES-315	Transition Plan Final (BDU / IRP MSGA / NCC)	31-Jan-2024	31-Jan-2024	Complete	Confirmed
	IES-316	Market Trial Test Plan complete	16-Feb-2024	16-Feb-2024	Complete	Confirmed
	IES-317	Industry Go-Live Plan Draft published	26-Feb-2024		Complete	Confirmed
Level 1	IES-318	Initiative Readiness Checkpoint	1-Mar-2024	1-Mar-2024	Complete	Confirmed



# IESS June Milestone Table - Future



## IESS Project - Level 1 & 2 Milestones (External)

Level	Milestone ID	Milestone	Target Date	Expected Date	RAG	Tentative / Confirmed	
	IES-218	EMMS Data Model 5.3 Released to Pre-Production	27-Feb-2024	13-Mar-2024	Complete	Confirmed	Complete this period
Level 2	IES-107	AEMO Development & Testing complete	28-Mar-2024	4-Apr-2024	Amber	Confirmed	Compressed Quality Assurance timeline and carry over development activity.
	IES-320	AEMO Ready for Market Trial	2-Apr-2024		Amber	Confirmed	
Level 1	IES-321	MSATS Technical Specification final available	2-Apr-2024		Green	Confirmed	
	IES-322	EMMS Settlement Technical Specification final	2-Apr-2024		Green	Confirmed	
	IES-108	Market Trial start	2-Apr-2024		Green	Confirmed	
Level 1	IES-319	EMMS Data Model 5.3 final specification available	12-Mar-2024	10-Apr-2024	Green	Confirmed	
Level 2	IES-219	EMMS Data Model 5.3 Released to Production	10-Apr-2024		Green	Confirmed	
Level 2	IES-323	Settlement Certification complete	19-Apr-2024	29-Apr-2024	Green	Confirmed	Minor schedule update, Solution Readiness not impacted, issues if any to be remediated prior go-live decision,
Level 2	IES-324	Industry Go-Live Plan Final published	19-Apr-2024		Green	Confirmed	
	IES-325	Go-Live Checkpoint	1-May-2024		Green	Confirmed	
	IES-326	Market Trial complete	24-May-2024		Green	Confirmed	
	IES-220	IESS Settlements Go-Live	2-Jun-2024	15-May-2024	Amber	Confirmed	Deployment of code prior to rule commencement. Reflects current scheduling. Amber reflection of overall schedule
Level 2	IES-327	Rule Commencement Date - Settlements [NECR]	2-Jun-2024		Amber	Confirmed	Reflects compressed schedule
Level 2	IES-221	IESS BDU Go-Live	3-Jun-2024	16-May-2024	Amber	Confirmed	Deployment of code prior to rule commencement. Reflects current scheduling. Amber reflection of overall schedule
	IES-109	IESS Final Release [BDU] - Rule Commencement	3-Jun-2024		Amber	Confirmed	Reflects compressed schedule



# 2. Industry Go-Live Plan and Go Live Checkpoint

Greg Minney

# IESS Go Live Plan Feedback

- Feedback received was focused around **Section 3.4: Go Live Schedule**.
- Required updates will be addressed in final version of Plan due for publication 19 April 2024.

REF ID	FEEDBACK RECEIVED	AEMO RESPONSE
9	Querying the inclusion of reference to BDU capability commencement, as BDU is listed as out of scope	<ul style="list-style-type: none"> <li>• The IESS Go Live plan is specific to activities <u>required</u> on or before 02 &amp; 03 June 2024.</li> <li>• Whilst participants may choose to transition any time prior to 03 March 2025, the capability must be in place by 03 June 2024</li> <li>• The Go Live plan provides earliest timeframe BDU transition could commence – with individual participant timings agreed in the BDU transition Plan.</li> </ul>
10-12	IRP Transition for Existing and non-customer load participants is not addressed	<ul style="list-style-type: none"> <li>• The IESS Go Live plan is specific to activities <u>required</u> on or before 02 &amp; 03 June 2024.</li> <li>• Existing and non-customer load participants have a grace period until 03 Dec 2024 to transition into the IRP registration category</li> </ul>
13	Request for clarity on timing of IESS Release enablement in Production	<ul style="list-style-type: none"> <li>• A clearer view of the timing will be confirmed and updated in the final version of the IESS Go Live plan.</li> </ul>
15	Request for clarity on the timing of CRs being received once NCC updates have occurred (i.e. at time of triggering, or as part of AEMO nightly batch)	<ul style="list-style-type: none"> <li>• To be confirmed and clarified in the final version of the IESS Go Live plan.</li> </ul>

Thank you to those participants who provided feedback on the IESS Go Live Plan.

# 3-month readiness & go-live checkpoint

INITIATIVE	<p><b>IESS Sun 02 Jun 2024</b></p> <ul style="list-style-type: none"> <li>• New non-energy cost recovery (NECR) framework</li> <li>• Associated settlement database structure updates</li> <li>• New IRP registration category</li> <li>• New/updated NCC</li> </ul>	<p><b>IESS Mon 03 Jun 2024</b></p> <ul style="list-style-type: none"> <li>• BDU classification and participation</li> </ul>	<p><b>Summary status: AMBER – as at 4 March 2024</b></p> <ul style="list-style-type: none"> <li>• Overall track against schedule, however: <ul style="list-style-type: none"> <li>• Risk to completion of internal testing prior to BDU deployment milestone</li> <li>• Market Trial on schedule noting potential overlap with AEMO’s internal testing for BDU capability. No impact to trial schedule and settlement testing</li> </ul> </li> <li>• Risks recognised and being actively managed</li> </ul>
GO-LIVE CRITERIA			
AEMO	<p><b>AEMO solution</b> tested in-line with requirements for:</p> <ul style="list-style-type: none"> <li>• NEM operation incorporating new NECR framework from rule commencement date</li> <li>• Providing for new IRP registration category</li> </ul>	<ul style="list-style-type: none"> <li>• <b>AEMO solution</b> tested in-line with requirements for enabling scheduled batteries to participate as a single DUID in energy and FCAS markets</li> </ul>	<ul style="list-style-type: none"> <li>• IRP registration and NECR /settlement framework capability is progressing to schedule.</li> <li>• Dispatch and Bidding Internal Testing is behind schedule, with defects being remedied.</li> <li>• Required capability needed for Market Trial start is on schedule. <ul style="list-style-type: none"> <li>• NOTE: Known defects may need to be carried over from UAT. Status to be confirmed with affected participants prior to relevant test phase/s.</li> </ul> </li> <li>• Market trial preparations (environment refresh, data model releases, market trial plan) are on schedule.</li> </ul>
	<p><b>AEMO business:</b></p> <ul style="list-style-type: none"> <li>• Ready to operate new NECR framework</li> <li>• Ready to register IRPs</li> <li>• Has re-registered SGAs as IRPs</li> </ul>	<ul style="list-style-type: none"> <li>• <b>AEMO business</b> ready to support BDU operations in the NEM</li> </ul>	<ul style="list-style-type: none"> <li>• <b>AEMO business readiness</b> : Preparations on schedule to support market trial and full operation.</li> <li>• <b>NEM Procedures:</b> Final ‘standard’ procedure consultation for IESS is complete. Only ‘minor and administrative’ consultations remain and are on track.</li> </ul>
INDUSTRY	<ul style="list-style-type: none"> <li>• Participant readiness activity is not a pre-requisite for go-live.</li> <li>• However, to ensure that NEM operations remain uninterrupted and reliable, AEMO will monitor for any systemic issue that materially affects NEM operational integrity.</li> </ul>	<p>Participant readiness activity is not a pre-requisite for go-live, noting:</p> <ul style="list-style-type: none"> <li>• BDU transition period to 03 Mar 2025 means that there is no industry readiness requirement for “day 1” (rule commencement)</li> <li>• Participants can cutover on or near rule commencement date if they choose to and are ready</li> </ul>	<ul style="list-style-type: none"> <li>• <b>IESS settlements:</b> AEMO has monitored for any “systemic impact to NEM operational integrity” via one-to-one conversations with participants and a call for participants to raise any issues. No such systemic impact has been identified by AEMO or raised by participants.</li> <li>• <b>IESS IRP/BDU:</b> Transition timings to be agreed and confirmed prior to 3 June – staggered deployment provides readiness flexibility. There is no go-live dependency from the participants’ BDU implementation activities.</li> </ul>
CONTINGENCY	Contingency approaches developed and contingency actions proposed		<p><b>Contingency approaches:</b> Agreed contingencies being monitored. No trigger points exceeded at 3-month (Feb) checkpoint. Contingencies will be monitored and reviewed for the 1-month (May) go-live checkpoint.</p>

# 3. Readiness engagement

Emily Brodie

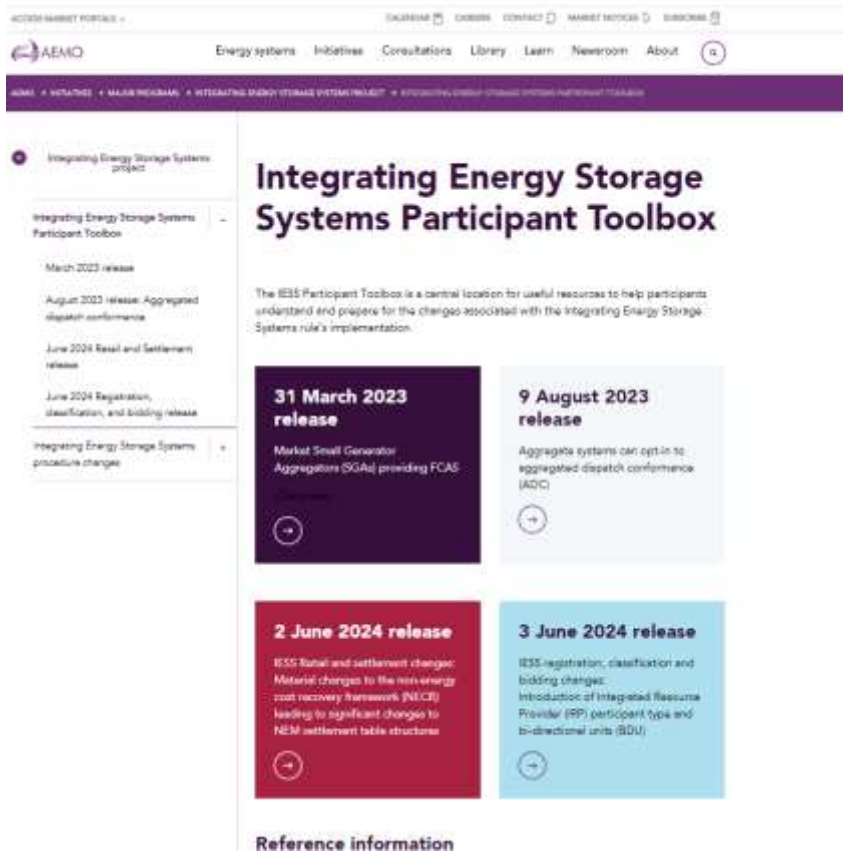
# IESS readiness update



< 2 weeks until market trial  
~ 2 months until go-live

	FEB 2024	MAR 2024	APR 2024
<b>Readiness</b>	<ul style="list-style-type: none"> <li>✓ Readiness checkpoint preparation</li> <li>✓ Contingency approaches</li> <li>✓ Go-live planning</li> </ul>	<ul style="list-style-type: none"> <li>✓ Debrief on readiness checkpoint</li> <li>• Confirm BDU cutover schedule (in progress)</li> </ul>	<ul style="list-style-type: none"> <li>• Publish final go-live plan</li> <li>• Readiness checkpoint preparation</li> </ul>
<b>Test &amp; trial</b>	<ul style="list-style-type: none"> <li>✓ PDSE activity</li> <li>✓ Pre-production refresh</li> <li>✓ Market trial planning</li> </ul>	<p>Detailed IESS market trial planning:</p> <ul style="list-style-type: none"> <li>• Test script / workbook development</li> <li>• Detailed schedule of activities for selected scenarios</li> <li>• Confirmation of test reporting</li> <li>✓ Establish participant Practitest access and deliver training</li> </ul>	<ul style="list-style-type: none"> <li>• Market trial commences</li> </ul>
<b>Stakeholder engagement</b>	<ul style="list-style-type: none"> <li>✓ Weekly PDSE Q&amp;A session</li> <li>✓ IESS settlements 1to1 discussions</li> <li>✓ MSP information session</li> <li>✓ IRP general briefing and Q&amp;A</li> <li>✓ BDU Readiness Focus Group #3</li> </ul>	<ul style="list-style-type: none"> <li>✓ Weekly PDSE and Market Trial Q&amp;A sessions</li> <li>✓ BDU Readiness Focus Group #4</li> <li>✓ IESS settlements 1to1 discussions</li> </ul>	<ul style="list-style-type: none"> <li>• Weekly PDSE and Market Trial Q&amp;A sessions</li> <li>• Information sessions or Q&amp;A sessions as needed</li> </ul>

# IESS contact and information



**Integrating Energy Storage Systems Participant Toolbox**

The IESS Participant Toolbox is a central location for useful resources to help participants understand and prepare for the changes associated with the Integrating Energy Storage Systems rule's implementation.

- 31 March 2023 release**  
Market Small Generator Aggregators (SGA) providing FCAS
- 9 August 2023 release**  
Aggregate systems can opt-in to aggregated dispatch conference (ADC)
- 2 June 2024 release**  
IESS Retail and settlement changes, Material changes to the non-energy cost recovery framework (NLCR) leading to significant changes to NEM settlement table structure
- 3 June 2024 release**  
IESS registration, classification and bidding changes, Introduction of Integrated Resource Provider (IRP) participant type and bi-directional units (BDU)

Reference information

<b>IESS project information</b>	<a href="#">Participant toolbox</a>
<b>IESS market procedure updates</b>	<a href="#">Indicative change program</a>
<b>Tech spec information</b>	<a href="#">IT change &amp; release management</a>
<b>General IESS queries</b>	<a href="mailto:ies@iem.com.au">ies@iem.com.au</a>
<b>IESS market trial queries</b>	<a href="mailto:NEMReform@iem.com.au">NEMReform@iem.com.au</a>



# 4. Market trial planning – ITWG engagement

Chris Fleming



# IESS market trial planning



KEY DATES	ACTIONS
<b>Tue 17 Oct</b>	AEMO published final <a href="#">IESS market trial strategy</a> that considers participant feedback
<b>Thu 30 Nov</b>	<ul style="list-style-type: none"><li>• ITWG to discuss planned approach to market trial execution</li><li>• AEMO to expand strategy scenarios and general timing of phases</li></ul>
<b>Mon 15 Jan</b>	Participant feedback on Market trial planning due
<b>Fri 19 Jan</b>	Draft Market Trial Plan issued for comment
<b>Wed 24 Jan</b>	ITWG to consider participant feedback
<b>Fri 2 Feb</b>	Participant feedback due on IESS market trial plan
<b>Fri 16 Feb</b>	Final IESS market trial plan issued
<b>Thu 29 Feb</b>	Participants expressions of interest for the Market by 29 Feb
<b>Feb – March</b>	Detailed trial preparation including: <ul style="list-style-type: none"><li>• Test script / workbook development</li><li>• Detailed schedule of activities for invitation and bi-lateral scenarios</li><li>• Confirmation of test reporting</li><li>• Establish Participant Practitest access and deliver training</li></ul>



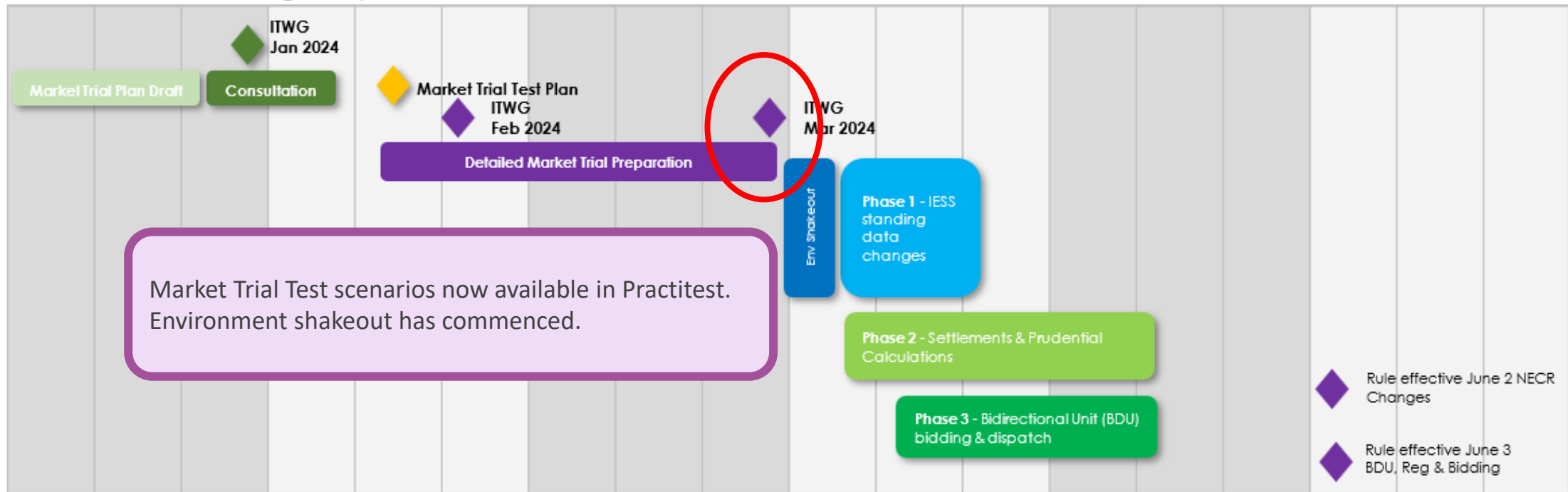


# IESS market trial planning

## IESS industry testing and market trial high level timeline

2024	2024	2024	2024	2024	2024
JAN	FEB	MAR	APR	MAY	JUN

### IEE Market Trial Planning & Implementation



# IESS Market Trial Planning - Scope



Test Phase	Timing	How we are testing proposed scope	Participants
<b>Phase 1</b> – IESS standing data changes	2 April	<ul style="list-style-type: none"> <li>• Testing cutover process of SGAs to IRP and de-generators using the bulk data tool.</li> <li>• Participants confirming Registration &amp; Market Standing Data Changes are reflected correctly. This will include new NMI Classification Codes (NCC).</li> </ul>	FRMPs, market generators, market customers, IRPs, SGAs, Market ancillary service providers, network service providers, metering service providers, embedded network managers
<b>Phase 2</b> – Settlements & Prudential Calculations	3 April – 6 May 2024	<ul style="list-style-type: none"> <li>• Pre mock go-live settlement runs (regression using old settlement method):</li> <li>• Post mock go-live settlement runs (New Settlement Method):</li> <li>• Prudential dashboard updated for participants during this period.</li> <li>• Participants to review data model &amp; reports after each settlement run.</li> <li>• Participants to confirm the market fee calculations under the new database structure.</li> </ul>	FRMPs, market generators, market customers, IRPs, SGAs, Market ancillary service providers, network service providers, metering service providers, embedded network managers
<b>Phase 3</b> – Bi-directional Unit bidding and dispatch	19 April – 6 May 2024	<ul style="list-style-type: none"> <li>• Simulated cutover                             <ul style="list-style-type: none"> <li>◦ Selected participant transition from 2DUID to 1DUID</li> </ul> </li> <li>• Participants to confirm bidding on new BDU</li> <li>• Participants to confirm dispatch instructions and review submitted bids</li> <li>• Participants confirming Market Standing Data Changes are reflected correctly. This includes New NMI Classification Code (NCC) updates.</li> </ul>	Market Generations (Battery – Gen Only), Market Customers (Battery – Load Only)

# IESS Market Trial - Next steps

- 20 Participants have responded to expressions of interest for the Market Trial. <https://forms.office.com/r/v21psxfyYG>.
- Updated version of the test plan issued reflecting timing to the NCC approach.
- BDU registrations for the Market Trial closed on 8<sup>th</sup> March.
- Initial Practitest training session run on 14<sup>th</sup> March. Follow-up session will be run on 28<sup>th</sup> March.
  - Please email [NEMReform@aemo.com.au](mailto:NEMReform@aemo.com.au) to register for the training.
- Test scenarios for the Market trial available in Practitest from 22<sup>nd</sup> March.
- Shake-out testing has commenced in pre-prod in preparation for the Market Trial
- Daily stand-ups to support the Market Trial to commence 2<sup>nd</sup> April.



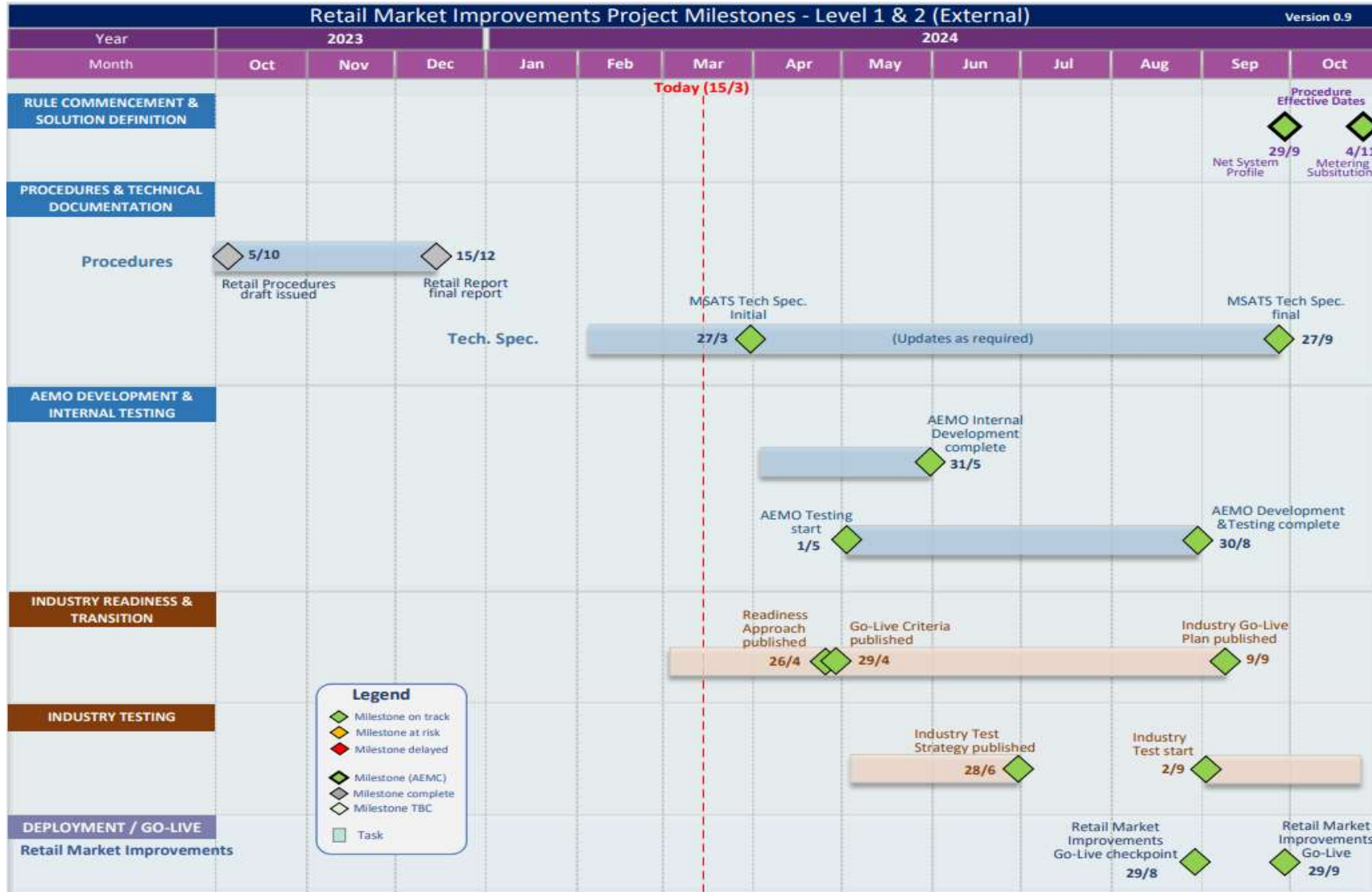
# 6. September 2024 Release

# September 2024 Retail Market Improvement Release



- Scope supported by the Retail Market Release encompasses:
  - A preferred longer-term Net System Load Profile (NSLP) Methodology (ICF\_072)
    - Considers situations where positive and negative NSLP trading interval values are present.
    - Procedure Effective Date 29 Sept 2024
  - Substitution Types review (ICF\_054)
    - Intends to provide recipients a clearer understanding of the reason and method used to support a substituted metering data value
    - Procedure Effective Date 4 November 2024

# September Release Timeline



## Progress Summary

- Retail Improvements Release scheduled 29<sup>th</sup> September
- Development team in place – currently confirming market Systems Solution approach
- Initial version of MSATS tech spec on track for 27<sup>th</sup> March issue
- Planned milestones to support committed procedure effective dates
- Readiness Approach to outline expected industry Test support for both components of release

# September – Retail Improvements – Milestones

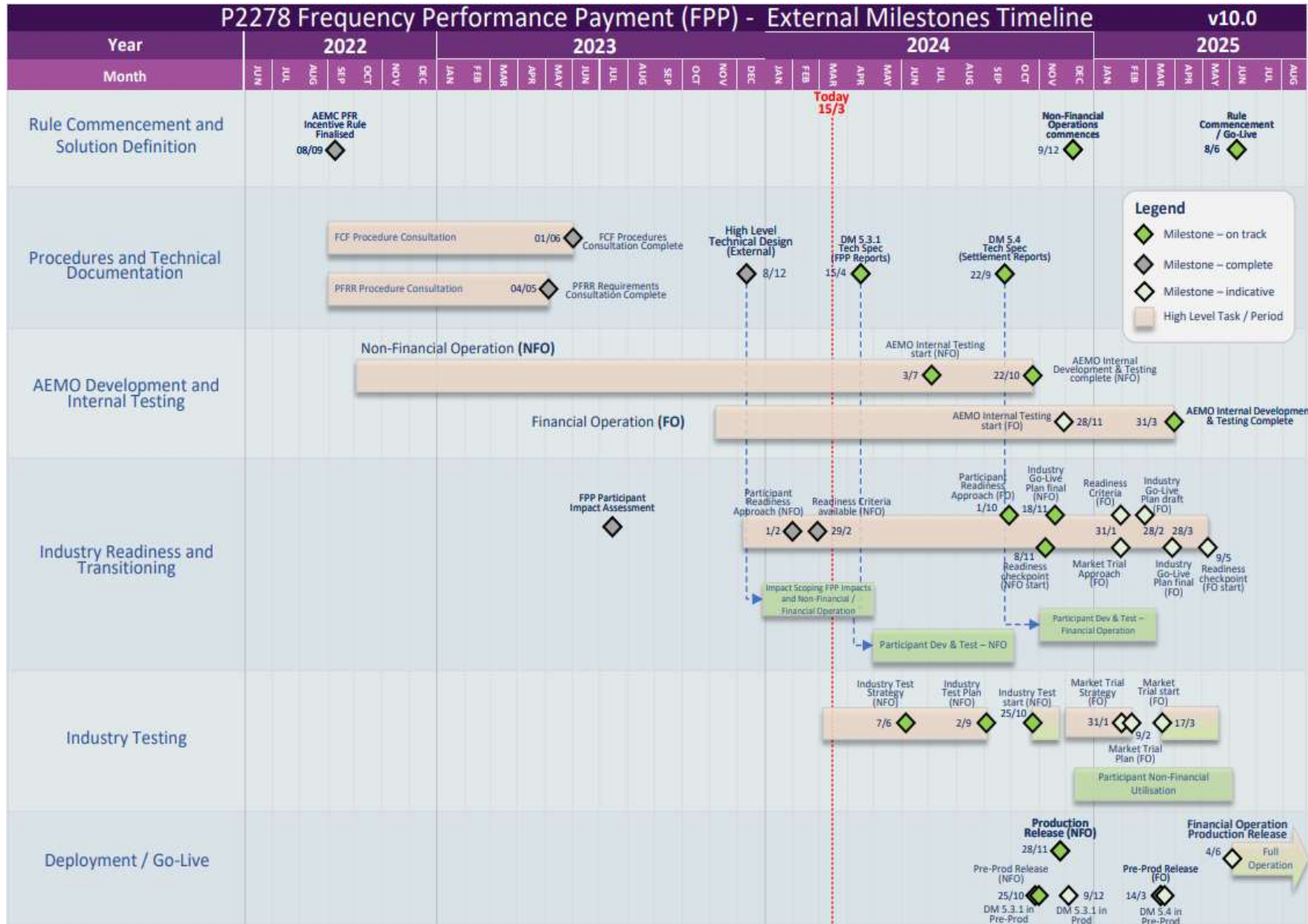
## September 2024 - Level 1 & 2 Milestones (External)

Level	Milestone ID	Milestone	Target Date	Expected Date	Status	RAG	Tentative / Confirmed	Commentary
Level 2	RMI-201	Retail Procedures draft issued	5-Oct-2023	5-Oct-2023	Complete		Confirmed	
Level 2	RMI-202	Retail Report final report	15-Dec-2023	11-Dec-2023	Complete		Confirmed	
Level 2	RMI-211	MSATS Tech Spec initial	27-Mar-2024			Green	Confirmed	
Level 2	RMI-203	Readiness Approach published	26-Apr-2024			Green	Confirmed	
Level 2	RMI-204	Go-Live Criteria published	29-Apr-2024			Green	Confirmed	
Level 2	RMI-212	MSATS Tech Spec final	27-Sep-2024			Green	Confirmed	
Level 2	RMI-205	Industry Test Strategy published	28-Jun-2024			Green	Confirmed	
Level 2	RMI-206	AEMO Internal Development complete	31-May-2024			Green	Confirmed	
Level 2	RMI-207	AEMO Internal Testing start	1-May-2024			Green	Confirmed	
Level 2	RMI-208	AEMO Development & Testing complete	30-Aug-2024			Green	Confirmed	
Level 1	RMI-101	Industry Test start	2-Sep-2024			Green	Confirmed	
Level 2	RMI-209	Retail Market Improvements Go-Live checkpoint	29-Aug-2024			Green	Confirmed	
Level 2	RMI-210	Industry Go-Live Plan published	9-Sep-2024			Green	Confirmed	
Level 1	RMI-102	Retail Market Improvements Go-Live	29-Sep-2024			Green	Confirmed	
Level 1	RMI-103	Net System Profile - Procedure Effective Date	29-Sep-2024			Green	Confirmed	
Level 1	RMI-104	Metering Substitution - Procedure Effective Date	4-Nov-2024			Green	Confirmed	



# 7. December 2024 / June 2025 FPP Release

# Frequency Performance Payments (FPP) Milestones Timeline



## RELEASE COMMENTARY

- Overall project status **GREEN**
- AEMO development in progress
- Milestones include readiness deliverables in support of Non-financial and financial operation
- Participant impact assessment provided in [this presentation](#) based on industry workshops
- [High level technical design](#) published on 8 December 2023. FPP Reporting Data model to be published 15 April 2024- on track.
- Final Industry Readiness and Go-live approach published 29 January 2024. NFO Go-live criteria discussed in this session.

# New FPP information and education resources

## Video explainers

Six videos published, three forthcoming.

- One provides an introduction to the FPP reform, with the others covering: The calculation process; unit deviation and residual; performance calculation; frequency measure, and; contribution factors.
- Forthcoming videos on: Requirement for corrective response (RCR) and usage; default contribution factors (DCFs), and; FPP-related settlement calculations

## FPP Frequently Asked Questions FAQ document

- First version contains 47 FAQs across five topics: overview; measurements and calculations; non-financial operation (NFO); timeline, and: resources and opportunities for engagement.
- The document will be updated as new questions are received and answered.

## Stakeholder information session

Recording of 23 Feb session published on AEMO's website.

All available at: <https://aemo.com.au/initiatives/major-programs/frequency-performance-payments-project>

# FPP-NFO Milestone Table

## FPP Project - Level 1 & 2 Milestones (External)

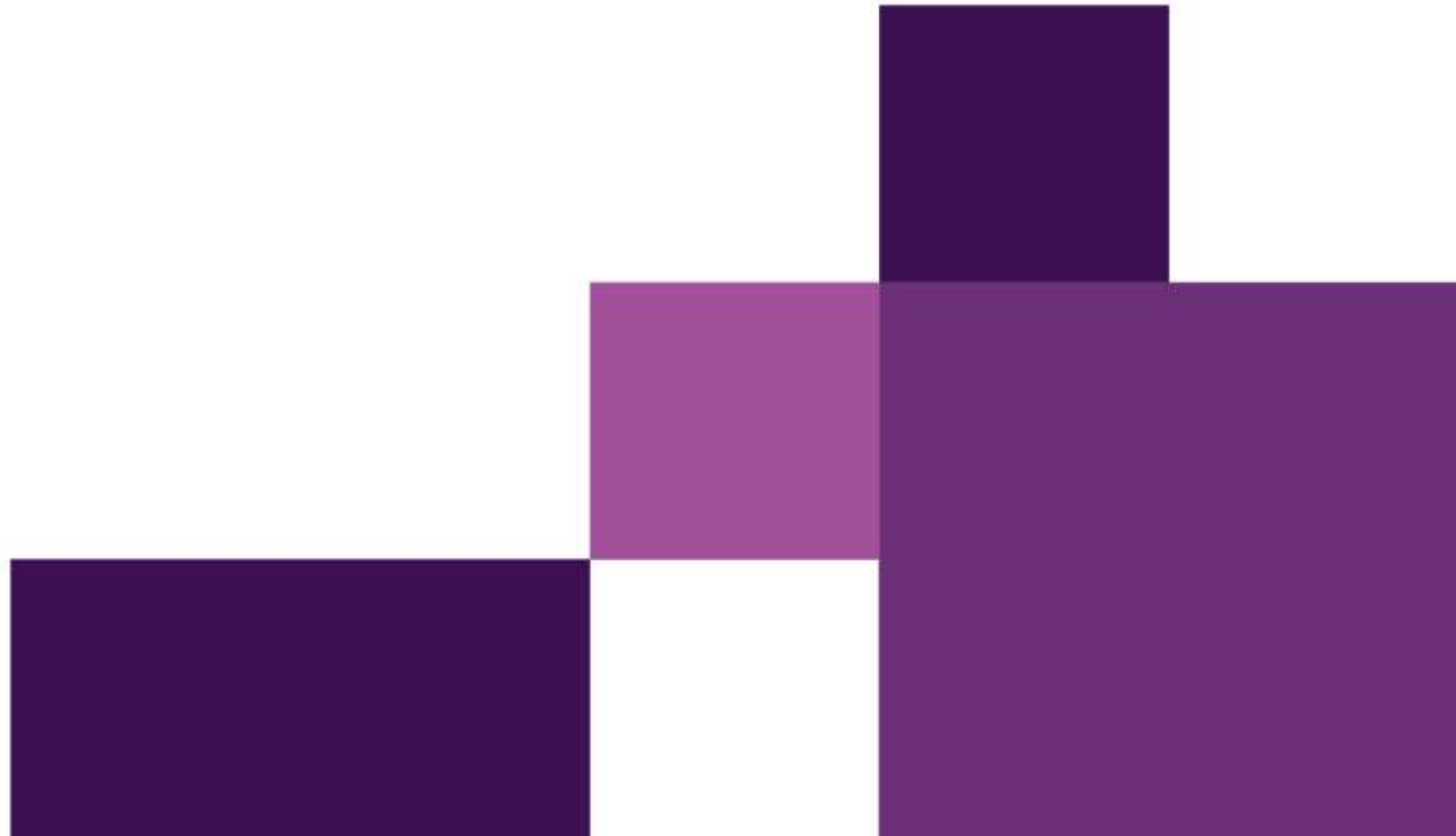
Level	Milestone ID	Milestone	Project	Target Date	Expected Date	RAG	Tentative / Confirmed	Commentary
Level 2	FPP-221	High Level Technical Design (External)	FPP-NFO	15-Dec-2023	8-Dec-2023		Confirmed	
Level 2	FPP-222	Participant Readiness Approach (incl. Dev Support Reqmts) published	FPP-NFO	1-Feb-2024	1-Feb-2024		Confirmed	
Level 2	FPP-230	Readiness Criteria available (NFO)	FPP-NFO	29-Feb-2024	29-Feb-2024		Confirmed	
Level 2	FPP-217	Data Model 5.3.1 Tech Spec (FPP Reports)	FPP-NFO	15-Apr-2024		Green	Confirmed	Project resource to deliver confirmed
Level 2	FPP-227	Industry Test Strategy (NFO) published	FPP-NFO	7-Jun-2024		Green	Confirmed	
Level 2	FPP-212	AEMO Internal Testing commenced (NFO)	FPP-NFO	3-Jul-2024		Green	Confirmed	
Level 2	FPP-229	Industry Test Plan published (NFO)	FPP-NFO	2-Sep-2024		Green	Confirmed	
Level 2	FPP-231	Industry Development finish (NFO)	FPP-NFO	1-Oct-2024		Green	Tentative	
Level 2	FPP-232	Readiness Checkpoint - Industry Test start (NFO)	FPP-NFO	15-Oct-2024		Green	Confirmed	
Level 1	FPP-103	AEMO Internal Development & Testing complete (NFO)	FPP-NFO	22-Oct-2024		Green	Confirmed	
Level 2	FPP-225	Pre-Production Release (NFO)	FPP-NFO	25-Oct-2024		Green	Confirmed	
Level 2	FPP-233	Data Model 5.5 available in Pre-Prod	FPP-NFO	25-Sep-2024		Green	Confirmed	
Level 1	FPP-104	Industry Test start (NFO)	FPP-NFO	25-Oct-2024		Green	Confirmed	
Level 2	FPP-234	Industry Go-Live Plan published - draft (NFO)	FPP-NFO	4-Nov-2024		Green	Confirmed	
Level 2	FPP-236	Readiness Checkpoint - Go-Live (NFO)	FPP-NFO	8-Nov-2024		Green	Confirmed	
Level 2	FPP-235	Industry Go-Live Plan published - final (NFO)	FPP-NFO	18-Nov-2024		Green	Confirmed	
Level 2	FPP-215	Industry Test finish (NFO)	FPP-NFO	22-Nov-2024		Green	Confirmed	
Level 2	FPP-238	Data Model 5.3.1 available in Prod	FPP-NFO	9-Dec-2024		Green	Tentative	
Level 2	FPP-246	Production Release (NFO)	FPP-NFO	28-Nov-2024		Green	Confirmed	
Level 1	FPP-105	Non-Financial Operations commences	FPP-NFO	9-Dec-2024		Green	Confirmed	

# FPP-FO Milestone Table

## FPP Project - Level 1 & 2 Milestones (External)

Level	Milestone ID	Milestone	Project	Target Date	Expected Date	RAG	Tentative / Confirmed	Commentary
Level 2	FPP-218	Data Model 5.4 Tech Spec (Settlement Reports)	FPP-FO	22-Sep-2024		Green	Confirmed	
Level 2	FPP-214	Participant Readiness Approach complete (Financial Operation)	FPP-FO	1-Oct-2024		Green	Confirmed	
Level 2	FPP-237	AEMO Internal Testing commenced (FO)	FPP-FO	28-Nov-2024		Green	Tentative	
Level 2	FPP-223	Market Trial Strategy published (Financial Operation)	FPP-FO	31-Jan-2025		Green	Tentative	
Level 2	FPP-224	Readiness Criteria available (Financial Operation)	FPP-FO	31-Jan-2025		Green	Tentative	
Level 2	FPP-246	Market Trial Plan complete (Financial Operation)	FPP-FO	10-Feb-2025		Green	Tentative	
Level 2	FPP-239	Industry Go-Live Plan published - draft (Financial Operation)	FPP-FO	28-Feb-2025		Green	Tentative	
Level 2	FPP-240	Readiness Checkpoint - Market Trial start (Financial Operation)	FPP-FO	28-Feb-2025		Green	Tentative	
Level 2	FPP-241	Industry Development Finish (Financial Operation)	FPP-FO	15-Mar-2025		Green	Tentative	
Level 2	FPP-242	Data Model 5.4 available in Pre-Prod	FPP-FO	15-Mar-2025		Green	Tentative	
Level 2	FPP-226	Pre-Production Release (Financial Operation)	FPP-FO	14-Mar-2025		Green	Tentative	
Level 1	FPP-108	Market Trial start (Financial Operation)	FPP-FO	17-Mar-2025		Green	Tentative	
Level 2	FPP-243	Industry Go-Live Plan published - final (Financial Operation)	FPP-FO	28-Mar-2025		Green	Tentative	
Level 1	FPP-107	AEMO Internal Development & Testing complete (Financial Operation)	FPP-FO	31-Mar-2025		Green	Confirmed	
Level 2	FPP-244	Readiness Checkpoint - Financial Operation	FPP-FO	9-May-2025		Green	Tentative	
Level 2	FPP-245	Market Trial finish (Financial Operation)	FPP-FO	20-May-2025		Green	Tentative	
Level 1	FPP-109	Production Release (Financial Operation)	FPP-FO	4-Jun-2025		Green	Tentative	
Level 1	FPP-106	FPP Project Go-Live / Rule Commencement	FPP-FO	8-Jun-2025		Green	Confirmed	

# Industry Readiness Go-live Criteria



# FPP-NFO Dec 2024: Readiness and go-live criteria

<b>INITIATIVE</b>	<p><b>Non-Financial Operations from 9 Dec 2024</b></p> <ul style="list-style-type: none"> <li>FPP (NFO) go-live criteria will reflect Technical Readiness for go-live and AEMO preparedness to support new FPP calculations and reporting.</li> <li>Impacted participant readiness will not be considered as criteria for go-live.</li> </ul>
<b>AEMO READINESS</b>	<p><b>AEMO solution built and tested in-line with requirements for:</b></p> <ul style="list-style-type: none"> <li>NEM operation incorporating new FPP calculations and reporting of new data for all eligible generating units via NEM Reports / AEMO Data Interchange</li> <li>Additional infrastructure in place</li> </ul> <p><b>AEMO business ready to support the period of NFO operation</b></p>
<b>INDUSTRY READINESS</b>	<p><b>Participant readiness activity is not a pre-requisite for go-live.</b></p> <ul style="list-style-type: none"> <li>However, Participants are encouraged to make timely system/process changes to take advantage of the period of non-financial operations and assess the impact on their business. AEMO does not propose to monitor participant readiness.</li> </ul>
<b>CONTINGENCY</b>	<p>Contingency approaches to be developed and discussed with IF members</p>

Progress reporting will continue against committed milestones with Go-live checkpoints against criteria as scheduled.

# 8. Other Initiatives



# Foundational & Strategic Initiatives

Identity & Access Management  
Industry Data Exchange  
Portal Consolidation

Paul Johnson

# Background

- AEMO and Industry collaborated via the Foundational and Strategic Initiatives (FaSI) Working Group through the course of 2023. Final meeting held on 12 March 2024.
- AEMO assessed two broad options:
  - Continued reactive & tactical investment (minimum compliance for security).
  - Strategic step change – establishing fit for purpose foundational capability.
- These options cover the three key capabilities originally identified as foundational for NEM Reform:
  - Identity and Access Management.
  - Portal Consolidation.
  - Industry Data Exchange.
- AEMO recommends proceeding with strategic step change with a phased investment for Industry Data Exchange.

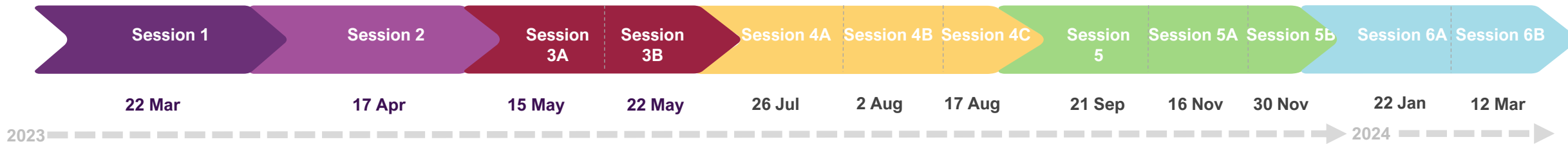
# Industry Consultation Update

## Draft Business Case

- AEMO received 9 submissions in response to the latest Draft Business Case Package.
- Stakeholders were generally supportive of the recommendations, and the majority of the feedback was specific items to make the business case clearer or more compelling.

## Published information and materials:

- IDAM, IDX, PC webpage: <https://aemo.com.au/en/consultations/industry-forums-and-working-groups/list-of-industry-forums-and-working-groups/nem-reform-foundational-and-strategic-initiatives-focus-group>
- Any queries can be directed to [NEMReform@aemo.com.au](mailto:NEMReform@aemo.com.au)



Session	Introduction	Discovery	Target State	Transition Strategy	Cost & Method	Business Case
Agenda	<ul style="list-style-type: none"> <li>• Introduce initiatives</li> <li>• Outline workshop plan</li> </ul>	<ul style="list-style-type: none"> <li>• Pain points and benefits</li> <li>• Survey</li> </ul>	<ul style="list-style-type: none"> <li>• Concept walkthrough</li> <li>• Survey</li> </ul>	<ul style="list-style-type: none"> <li>• Transition Strategy</li> <li>• Impacts &amp; Benefits</li> <li>• Survey</li> </ul>	<ul style="list-style-type: none"> <li>• Industry and AEMO costs</li> <li>• Assumptions, options and methodology</li> </ul>	<ul style="list-style-type: none"> <li>• Walkthrough of draft business case</li> <li>• Assessment and completion</li> </ul>

# Next Steps: Key Milestones

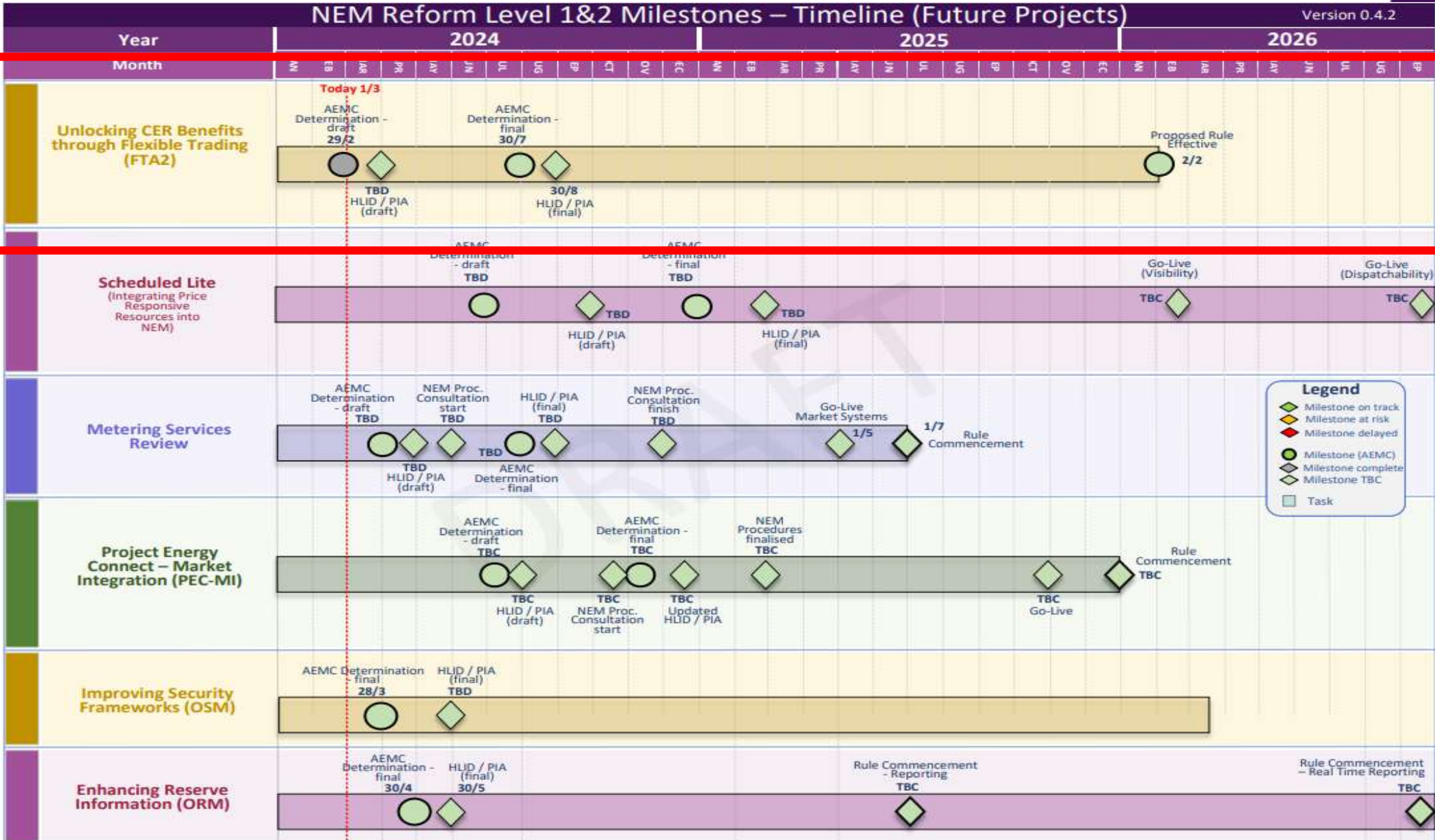
Date	Key Milestones	
<b>Tuesday 19 December 2023</b>	Release of draft business case package	<b>Completed</b>
<b>Monday 22 January 2024</b>	Draft business plan walk through session with stakeholders	<b>Completed</b>
<b>Tuesday 23 January to Thursday 8 February 2024</b>	Additional 1 on 1 meetings held with stakeholders	<b>Completed</b>
<b>Friday 9 February 2024</b>	Stakeholder submissions received on draft business case package	<b>Completed</b>
<b>Tuesday 27 February 2024</b>	Published updated “Business Case – Draft”	<b>Completed</b>
<b>Tuesday 12 March 2024</b>	Second / final stakeholder session – walk through of updates, next steps, closure of working group	<b>Completed</b>
<b>Thursday 28 March 2024</b>	Present at NEM Reform Executive Forum “Business Case – Draft”	
<b>End April 2024 (TBC)</b>	Issue final Business Case and confirm Decision.	

# Unlocking CER Benefits through Flexible Trading

Draft High Level Implementation Design and  
Participant Impact Assessment

Paul Johnson

# Upcoming Initiatives and Approach For Impact Assessment



# Upcoming initiatives – incorporation into NEM Reform Program

Regulatory program / Roadmap highlights a number of upcoming draft and final Rule Determinations.

**Post issue of initiative Draft Determination AEMO will provide industry with initial views on implementation approach and impact.**

- This is subject to sufficient policy direction contained in draft determination
- As determination delivery dates are confirmed, scheduled timeframes for HLID/ PIA timeframes will be assessed
- May be incorporated into the AEMC’s decision on Rule commencement (“Informed Go-live”)

## **Aims:**

- Improve visibility and increased participant planning timeframe
- Provide initial view of anticipated implementation timings and contention in lead up to final Determination
- Provide participants opportunity to respond in AEMC process to any proposed implementation timeframes

## **Information to be included (based on Draft Determination):**

- Key proposed Implementation dates
- Impacts to Market Systems, systems interactions, Procedures at level of H/M/L and Heatmap
- Participant Impacts (Who, H/M/L ) to extent known
- Potential Industry Test approach
- High Level Implementation and Delivery Schedule (unconstrained)
- Assessment of Congestion and Contention based on programme assessment
- Go-Live date recommendation.

## **Information will be reviewed based on Final Determination**

- There remains a high potential for changes to occur from the Draft to the Final Determination which will impact the initial information provided by AEMO
- Implementation milestones confirmed to form baseline delivery plans for project establishment and industry engagement
- Where initial assessment not performed based on Draft Determination, AEMO will provide HLID/PIA as first deliverable in the implementation process

# Unlocking CER Benefits through Flexible Trading

- AEMC has issued Draft Determination
  - Sets Proposed Rule Commencement Date of 2 Feb 2026
  - Requests stakeholder submissions on Draft 11 April 2024
  - Final determination July 2024
- AEMO intends to produce a draft HLID and PIA on the basis of the policy positions included in the Draft Determination
  - Planned circulation date 11<sup>th</sup> April
  - Planned Participant Briefing Session – 5<sup>th</sup> April
    - AEMO will schedule 1 hour session for walkthrough
    - Invitations will be sent to members of PCF and Implementation Forum
      - Please contact [NEMReform@aemo.com.au](mailto:NEMReform@aemo.com.au) if there are other members of your organisation who wish to attend session
- Impact assessments will be initial draft only with timelines subject to further review
  - NB this feedback is for AEMO/ Participant refinement of Implementation approach – not considered part of AEMC consultation
  - Project will update HLID/PIA following AEMC final determination to establish Implementation timings and key milestones
- For participants submissions to AEMC on the draft determination
  - Participants should provide their feedback to the AEMC process by the requested date (11 April), covering all areas of the draft
  - Comments provided to AEMC based on participant review of HLID/PIA in relation to the proposed rule commencement date only may be considered in the 2 weeks post.



# 9. Stakeholder Engagement

# Upcoming Engagements

For Noting

# Upcoming Engagements

March							April						
M	T	W	T	F	S	S	M	T	W	T	F	S	S
				1	2	3	1	2	3	4	5	6	7
4	5	6	7	8	9	10	8	9	10	11	12	13	14
11	12	13	14	15	16	17	15	16	17	18	19	20	21
18	19	20	21	22	23	24	22	23	24	25	26	27	28
25	26	27	28	29	30	31	29	30					

May							June						
M	T	W	T	F	S	S	M	T	W	T	F	S	S
		1	2	3	4	5						1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28	29	30

## NEM Reform Program Committees/Forums

Executive Fourm	Yellow
Reform Delivery Committee	Green
Reform Delivery Committee Collaborative Workshop	Cyan
Program Consultative Forum	Purple
Electricity Wholesale Consultative Fourm	Red
Implementation Forum	Pink
Industry Testing Working Group	Blue

## NEM Reform Initiative Specific

Foudational and Strategic Initaitives Focus Group	Dark Grey
IESS   Participant Development Support Environment (PDSE) Q&A	Yellow
IESS   BAU Focus Group	Brown

## Other Forums

Electricity Retail Consultative Forum	Light Green
---------------------------------------	-------------

## Other

National Public Holiday	Grey
State/Territory Public Holiday	Dark Grey

# 10. General Questions & Other Business



[NEMReform@aemo.com.au](mailto:NEMReform@aemo.com.au)



[AEMO | Implementation Forum](#)



# Appendix A: Competition law meeting protocol

# AEMO Competition Law - Meeting Protocol

AEMO is committed to complying with all applicable laws, including the Competition and Consumer Act 2010 (CCA). In any dealings with AEMO regarding proposed reforms or other initiatives, all participants agree to adhere to the CCA at all times and to comply with this Protocol. Participants must arrange for their representatives to be briefed on competition law risks and obligations.

Participants in AEMO discussions **must**:

- Ensure that discussions are limited to the matters contemplated by the agenda for the discussion
- Make independent and unilateral decisions about their commercial positions and approach in relation to the matters under discussion with AEMO
- 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:

- Which customers they will supply or market to
- The price or other terms at which Participants will supply
- Bids or tenders, including the nature of a bid that a Participant intends to make or whether the Participant will participate in the bid
- Which suppliers Participants will acquire from (or the price or other terms on which they acquire goods or services)
- 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.



For more information visit

[aemo.com.au](http://aemo.com.au)