



# 1<sup>st</sup> Technology Stakeholder Forum

21<sup>st</sup> November 2023

# Technology Stakeholder Forum

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Time	Title	Presenter & Additional Comments
11:00 – 11:05	Welcome & Introductions	<b>Forum Chair:</b> Nisha Bhamidimarri, Open Balancing Platform (OBP) Programme Manager
11:05 – 11:20	Role & Purpose of the Group	<b>Forum Chair:</b> Nisha Bhamidimarri; input from group members re: content of the proposed Terms of Reference
11:20 – 12:20	Fax Replacement Project	Paul Bainbridge, Project Manager & Jim Hunt, Enterprise Architect; input from group members re: key questions posed
12:20 – 12:30	Q&A	<b>Forum Chair:</b> Nisha Bhamidimarri
12:30	Meeting Close	<b>Forum Chair:</b> Nisha Bhamidimarri

# Draft Technology Stakeholder Forum Terms of Reference

**Forum Purpose:** Facilitate open & honest discussions between the ESO & Industry Partners re: Balancing Programme technology developments.

**Forum Remit:**

- Work together to understand and address current / future business and technology pain points and define roadmaps to resolve these
- Align balancing technology enhancements with industry expectations
- Active involvement in sessions to identify and work through challenges and opportunities
- Provide details on delivery plans, milestones and technology roadmaps
- Look for opportunities to collaborate on pre-release testing
- Review and discuss data exchange principles and designs
- Review and discuss service levels and security
- Review and discuss current and future integration and data sharing protocols and patterns

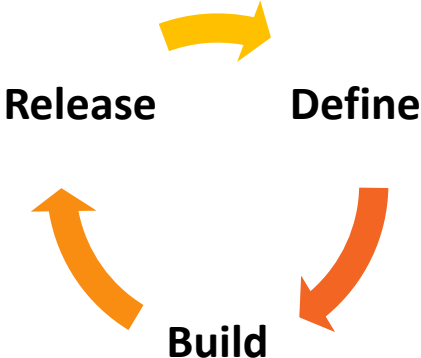
**Logistics**

- **Regularity:** Quarterly with more frequent engagement based on demand
- **Location:** Remote & in-person (meeting invite will specify)
- **Accessibility:** The stakeholder group will be an open forum for new attendees to join at any point.
- **Group Sign-up:** Sign up details will be through [MS forms](#) and will be shared on the website and via email.
- **Meeting Invites:** We will send meeting details by email.
- **Information Sharing:** We will share the outcome of each event following the 1st phase, as well as questions and answers on the ESO website.
- **Chair:** Nisha Bhamidimarri, Open Balancing Platform (OBP) Programme Manager.

### Engagement

We propose to have dedicated collaborative Technology Stakeholder forums to gather your views as set-out below:

<b>Phase 1 - Define</b>	<ul style="list-style-type: none"> <li>• Outline current ESO DD&amp;T and industry capabilities</li> <li>• Outline roadmap of capabilities planned for transformation</li> </ul>	<ul style="list-style-type: none"> <li>• Understand and feedback on Market technology challenges and pain points</li> <li>• Capture future requirements</li> <li>• Challenge and clarify assumptions</li> </ul>
<b>Phase 2 - Build</b>	<ul style="list-style-type: none"> <li>• Prioritise capabilities that will give the greatest benefits</li> <li>• Share delivery plans, look to collaborate</li> </ul>	<ul style="list-style-type: none"> <li>• Understand how to transition from existing to new capabilities</li> <li>• Understand and address impact of change on industry stakeholders</li> </ul>
<b>Phase 3 - Release</b>	<ul style="list-style-type: none"> <li>• Deploy new capabilities that support the roadmap for the balancing programme</li> <li>• Collaborate on testing</li> <li>• Maintain clarity on current and future developments</li> </ul>	<ul style="list-style-type: none"> <li>• Plan for future industry engagement and collaboration</li> <li>• Keep stakeholders involved and informed on a regular basis</li> </ul>



A landscape photograph of a field at sunset. The sun is low on the horizon, casting a warm glow. The field is green and yellow, with some dark trees in the background. Overlaid on the image are several bright green, curved light trails that sweep across the middle of the frame from left to right.

# Fax Replacement Project

Paul Bainbridge & Jim Hunt

# Agenda



- Introductions
- Project Drivers
- Approach Overview
- High-level Architecture(s)
- Indicative Timelines
- Feedback and Questions
- Further Stakeholder Engagement

# Introductions

- **Paul Bainbridge:** Project Manager
- **Naley Alobari:** Business Analyst
- **Jim Hunt:** Enterprise Architect
- **Roona Naik:** Programme Manager



# Project Drivers

## Business drivers:

- In Dec 2025, BT will be shutting down the PSTN network upon which the FAX machines rely.
- ESO would like to move away from this paper-based model to a digital solution
- The new solution needs to be :
  - Easily adopted by existing and new market participants
  - Secure
  - Meet the needs of the market participants and ESO
  - Deployed with minimal complexity / risk

## Technical Principles:

- Phased approach to digitisation (not 'big bang')
- Reduce dependencies on other Projects wherever possible
- Security by design
- Re-use / leverage existing platforms and technologies where appropriate
- Adaptable for future developments e.g. the Open Balancing Platform (OBP)
- Provide all parties with the delivery / receipt assurance required

# Approach Overview

- Two phases toward full digitisation and integration
- Minimal risk to all parties

## Phase 1: Initial Data Digitisation

- Use of web 'forms' to capture data
- Ease of adoption by all parties
- Minimal integration / technical complexity
- Lowest risk
- ***All faxes retired***

## Phase 2 (TBD): Possible API Enablement

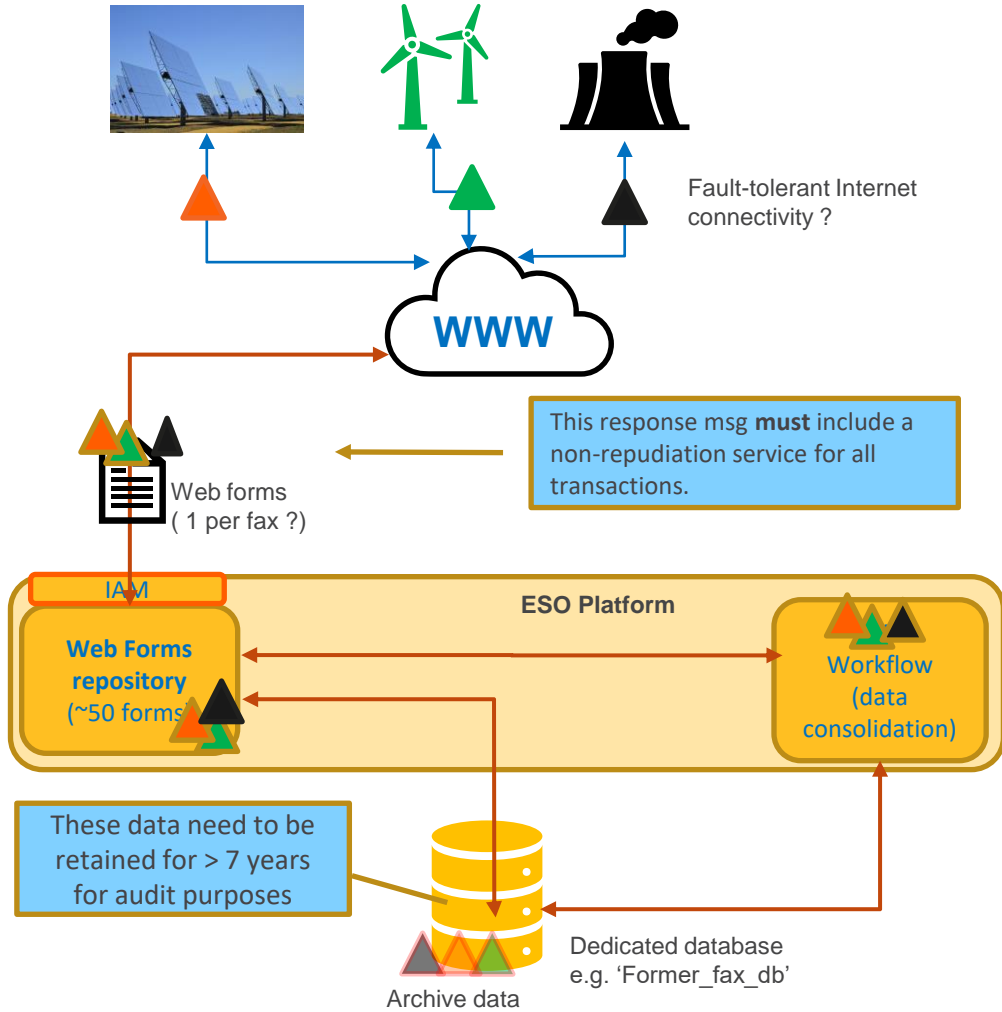
- API architecture
- Phased adoption
- Runs in parallel to Phase 1
- More complex integration and dependencies
- Greater opportunities for automation



# Phase 1: High-level Architecture; Internet 'portal'

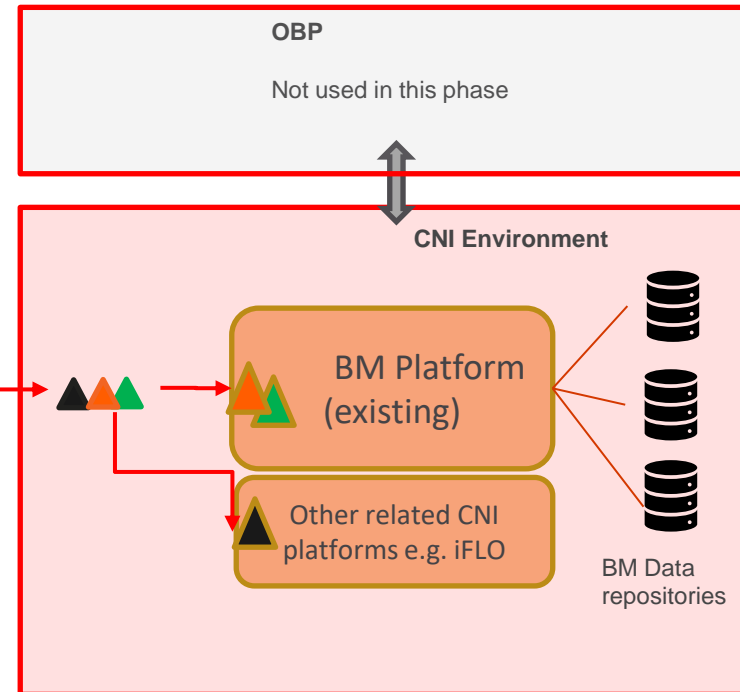
Triangles denote 'fax data' from market participants

All MPs (BMU / Non-BMU)

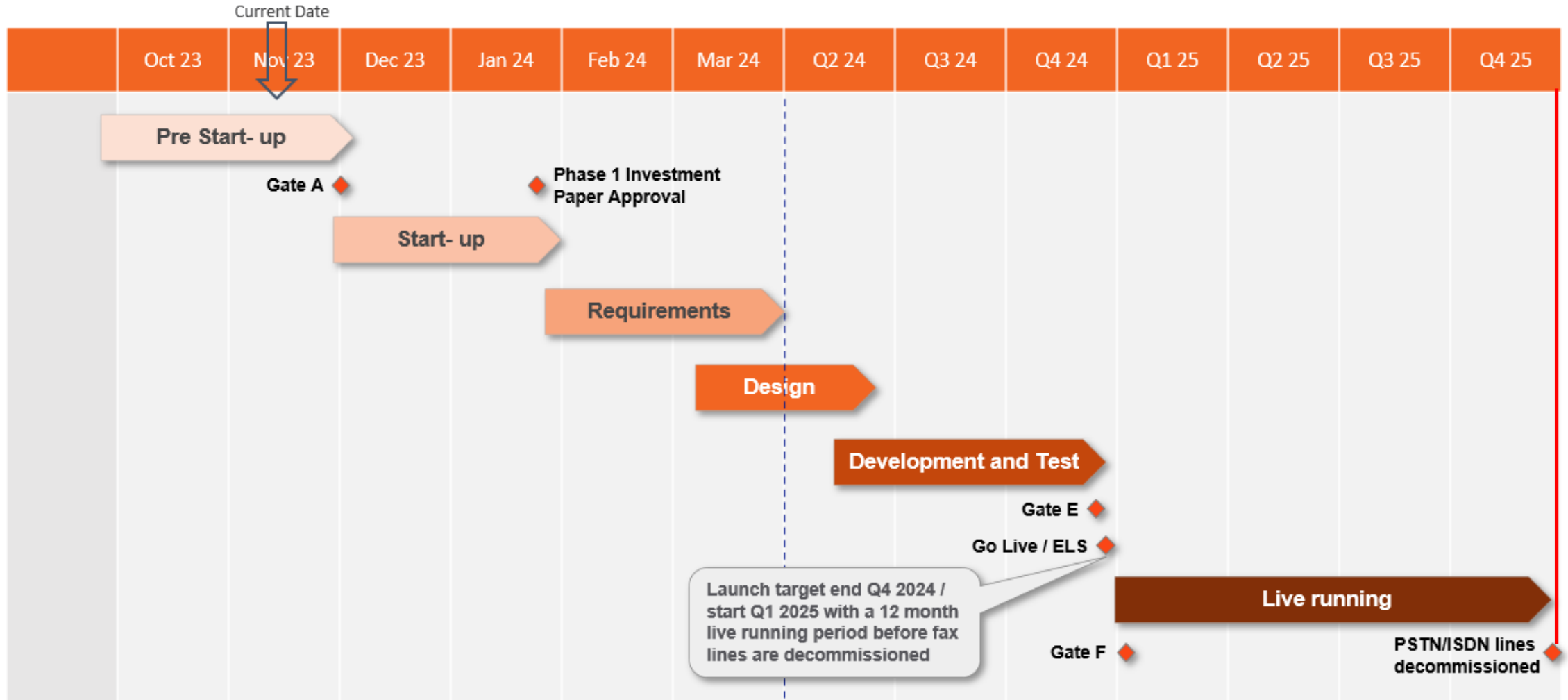


## Solution summary : Phase 1

- All faxes are eliminated and replaced by web forms to gather data
- Data capture for Phase 1 is via a web 'form' which enables all participants to use digitised data
- Lowest risk / fewest dependencies on other programmes / platforms

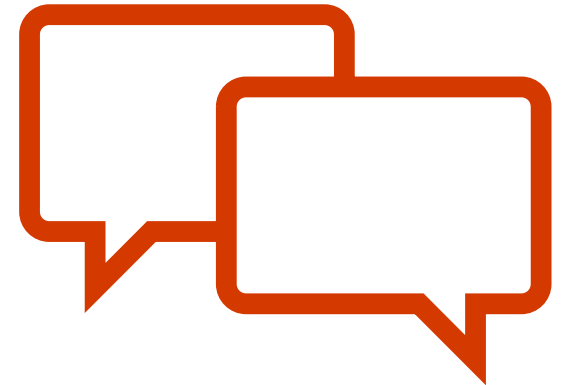


# Indicative Timelines



# Feedback and Questions

- What delivery receipts are required ? E.g. *Delivery* receipt versus *read* receipt or a delivery *and* read receipt with confirmation of the *data* received ???
- Does the 2 phase approach look viable from an adoption / usage perspective ?
- *Other questions....*



# Further Stakeholder Engagement

- We need your input ! Membership of a User Group to help us develop the solution; one from each organisation ?
- Solution demo meetings (playbacks)
- Other suggestions...



# Q&A

Do you have any further questions  
& input you would like to add?



# Meeting Close

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