

WDR Consultative Group #08

Tuesday 16 February 2021

WebEx only

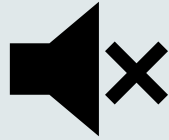
Please disconnect from your workplace VPN for WebEx call

**PLEASE NOTE THIS MEETING WILL BE RECORDED FOR THE
PURPOSE OF PREPARING MINUTES**

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

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

Online forum housekeeping



1. Please mute your microphone, this helps with audio quality as background noises distract from the information being shared.



2. Video is optional, but having it turned off helps with webinar performance and minimises distractions.



3. We ask that you utilise the Chat function for any questions or comments you may have if you are unable to use audio.



4. If you have dialled in via phone, could you please email your name and organisation to WDR@aemo.com.au for our records.



5. Be respectful of all participants and the process.

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**:

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.⁴

AGENDA

	TIME	TOPIC	PRESENTER
1	10:30am – 10:35am	Welcome	Ruth Guest (Chair)
2	10:35am – 10:40am	Notes, actions and feedback from previous meeting	Emily Brodie
3	10:40am – 11:00am	Implications of delay to SMS retail system deployment	Ruth Guest
4	11:00am – 11:05am	Program update	Emily Brodie
5	11:05am – 11:15am	2021 WDR forward agenda	Emily Brodie
6	11:15am – 11:25am	Dispatch compliance update	Madison Pigliardo
7	11:25am – 11:30am	Draft WDR Guidelines	Greg Ruthven
BREAK 11:30am – 11:40am			
8	11:40am – 11:50am	Draft market testing strategy	Priti Zacharopoulos
9	11:50am – 12:05pm	Overview of the Demand-side participation information portal	Magnus Hindsberger
10	12:05pm – 12:10pm	Stakeholder engagement survey	Chetna Mishra
11	12:10pm – 12:20pm	Debrief on DNSP/WDR workshops	Ruth Guest
12	12:20pm – 12:30pm	General questions and closing	Ruth Guest
APPENDICES			
A	Indicative program schedule		
B	Procedure changes timeline		
C	Project and system document changes		

Notes, actions and feedback from previous meeting

Emily Brodie

Responses to WDR CG #7 meeting actions

#	Topic	Action	Response
07.03.01	Program update	AEMO to provide its considerations of alternative Portfolio Management System upload options such as FTP.	<p>Where new work is being done by AEMO, more advanced interfaces like an online portal or an API is preferred over FTP.</p> <p>Online interface is expected to provide a more positive experience than FTP:</p> <ul style="list-style-type: none"> • real-time feedback in most cases • fewer security protocols • less development required by both AEMO and participants
07.06.01	Baseline eligibility and metrics compliance policy	<p>WDR CG to provide feedback on how to manage baseline adjustment windows when there are multiple WDR events on a single day. Feedback can either be via:</p> <ul style="list-style-type: none"> •email to wdr@aemo.com.au or, •submission to the <i>Baseline eligibility and metrics compliance policy</i> issues paper. 	One response was received and is under consideration.

Implications of delay to 5MS retail system deployment

Ruth Guest

Context: Delay to 5MS Retail system deployment

- On 05-Jan-21, AEMO's 5MS Program notified participants of a delay to the Retail deployment into both pre-Prod (01-Feb) and Prod (09-Mar)
- Coupled with existing Retail timeline pressures and lack of schedule contingency, delay is driven by:
 - Unforeseen technical complexities in migrating to "Enterprise" Cloud Platform
 - Challenges with Cutover Dress Rehearsal
 - Performance of Key RM Reports
- Two options for a new Retail go-live date were proposed:
 - **31-May-21** go-live date with 21-Jun-21 as a fallback.
 - 21-Jun-21
- Via industry consultation, 15 participants supported Option 1, no-one supported Option 2.
- **AEMO has confirmed the decision for Option 1:**
 - Retail go-live targeted for 31 May 2021
 - Checkpoint in early March
 - Fallback date (if required) would be as early as possible post 31-May and discussed via 5MS working groups
- **5MS commencement on 01-Oct-21 is unchanged, WDR commencement on 24-Oct-21 is unchanged**

Retail system deployment delay: Impact on WDR program

5MS Retail System Deployment option	Impact on WDR program
31 May 21	<ul style="list-style-type: none">Compresses timeframe for Portfolio Management System (PMS) / baseline integration testing ahead of its first release (planned for 24 Jun 21).Decision made to defer automated baseline eligibility assessment to October 2021.
21 Jun 21	<ul style="list-style-type: none">Release of WDR PMS on 24 Jun becomes highly undesirable due to proximity to 5MS release.This would force a delay to the first release, leading to AEMO being unable to process DRSP registrations in the PMS.

REFRESHER: Portfolio Management System

- In the first release (June), AEMO will use the PM System to:
 - Establish an operational database of NMIs under assessment for or classified and aggregated as WDR units
 - Upload a participant provided CSV files with NMI details that have a series of auto-validations and assessments applied
 - Review and approve NMI baseline eligibility based on assessments called on from the baseline system
- In the second release (October), DRSPs will use the Portfolio Management System to:
 - Manage their portfolio of WDRUs through a web interface
 - Submit new application requests for AEMO's approval (via CSV upload) and review validation outcomes prior to submission
- Initial registration, classification and aggregation is planned by application to AEMO's registration team from late June 2021.
- Once registered, the new Portfolio Management System will allow DRSPs to manage their portfolio and submit new classification and aggregation requests.

Mitigation approach

Mar/Apr

Monitor likely 5MS Retail system deployment date

May 2021

If 5MS retail system deployed on 31 May, then it is possible that 24 June PMS release may go ahead as planned.

AEMO will establish an alternative process for assessing baseline eligibility

Jun 2021

If 5MS retail system deployed in June, then apply appropriate mitigation option.

Options include:

- Publish registration forms and guides as planned
- Delay receipt and processing of applications until late August OR establish a set of AEMO manual work-arounds until systems are complete.

Discussion: Mitigation options for registration, classification and aggregation where PM System is delayed

Option		Approach	Benefits	Drawbacks
1	Process applications in PM System when it's ready (potentially up to late August)	<ul style="list-style-type: none"> AEMO to publish registration documentation for June DRSP applications are received from industry when systems are ready. AEMO starts processing applications in PM System once it is tested and deployed (potentially up to late August). Baselining assessment will be managed manually Manual baseline eligibility assessment outcomes will be persisted until the next scheduled compliance run 	<ul style="list-style-type: none"> Allows focus on system delivery to deliver streamlined process benefits Avoids managing NMLs in spreadsheets and risk of errors due to manual assessment. 	<ul style="list-style-type: none"> AEMO potentially breaches NER obligations Impact to applicants not yet understood
2	Process applications manually from 24 June	<ul style="list-style-type: none"> AEMO to publish registration documentation for June DRSP applications are received from industry end of June AEMO starts processing and assessing applications manually when they are received Manual baseline eligibility assessment outcomes will be persisted until the next scheduled compliance run 	<ul style="list-style-type: none"> Prevents any delay if early applications are received. NER obligations are met. 	<ul style="list-style-type: none"> Significant work put into developing out of system validations and assessment tools Extra work to potentially mitigate little or no impact to DRSP application timeframes.
3	Other?			

Discussion: Mitigation options for registration, classification and aggregation where PM System is delayed

DISCUSSION

- *What are the impacts to industry of a 4-week or 8-week delay to application processing?*
- *What other mitigation options should be considered?*

We would like to understand when you are planning to submit your applications. Please email us at wdr@aemo.com.au

Program update

Emily Brodie

Update on Project and system document change timelines

Area	Document	Early version released	Comments due	Updated version published
DISPATCH COMPLIANCE	Post-event dispatch compliance framework	Jan Mar 2021	Feb Apr 2021	Apr Apr/May 2021
TESTING	WDR Test Strategy	25 Feb 2021	11 Mar 2021	31 Mar 2021
	WDR Test Plan	Jun 2021	Jul 2021	Jul 2021
WHOLESALE – EMMS	EMMS Technical Specification	Mar Apr 2021	Apr mid May 2021	Apr 31 May 2021
	EMMS Data Model script and DM Report	Aug 2021	n/a	Sep 2021
	Data Interchange (DI) online help	Aug 2021	n/a	Sep 2021
PORTFOLIO MANAGEMENT SYSTEM	Guide to Portfolio Management System (PMS)	Apr mid Aug 2021	Apr late Aug 2021	May mid Sep 2021
	Markets Portal online help (PMS updates)	Apr mid Aug 2021	Apr late Aug 2021	May mid Sep 2021
RETAIL – MSATS/eMDM	MSATS Technical Specification	Apr mid May 2021	Apr early Jun 2021	May early Jul 2021
	New/Updated MSATS/eMDM guides	Early Jun 2021	Jul mid Jun 2021	Sep early Jul 2021

Date changes to align with internal development

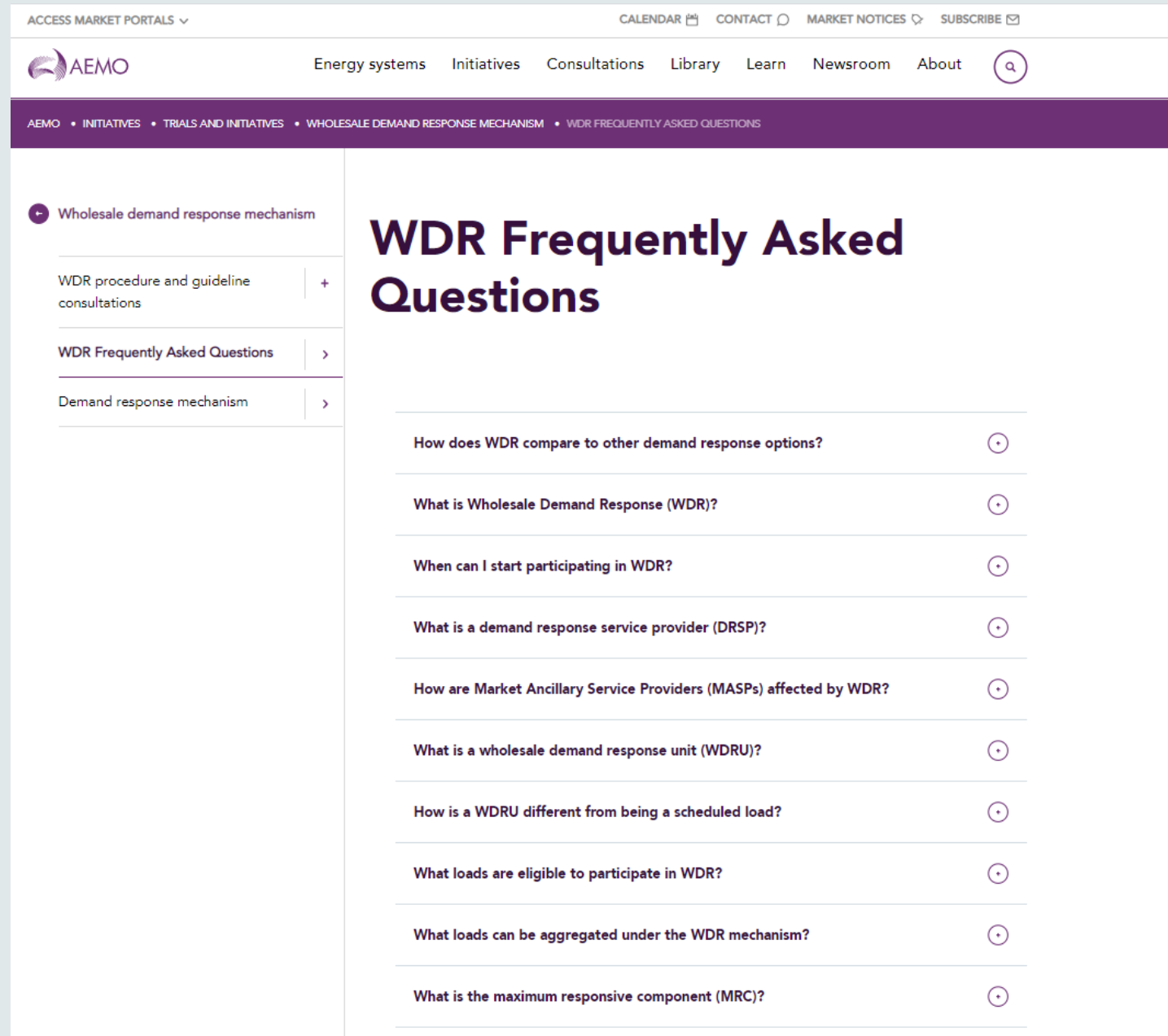
Reference document to be delivered with Data Model script mid August, aligning with industry testing.

Date changes to align with PMS external release and industry testing

Minor updates only

Website update

- 30+ FAQs added
<https://aemo.com.au/initiatives/trials-and-initiatives/wholesale-demand-response-mechanism/wdr-frequently-asked-questions>
- Coming soon:
Participant-specific information



ACCESS MARKET PORTALS ▾ CALENDAR 📅 CONTACT 🗨 MARKET NOTICES 📢 SUBSCRIBE ✉

AEMO Energy systems Initiatives Consultations Library Learn Newsroom About 🔍

AEMO • INITIATIVES • TRIALS AND INITIATIVES • WHOLESALE DEMAND RESPONSE MECHANISM • WDR FREQUENTLY ASKED QUESTIONS

Wholesale demand response mechanism

- WDR procedure and guideline consultations +
- WDR Frequently Asked Questions >
- Demand response mechanism >

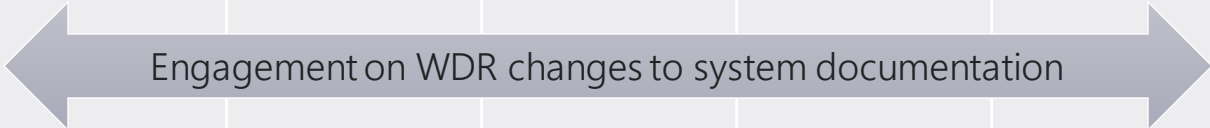
WDR Frequently Asked Questions

- How does WDR compare to other demand response options? ⓘ
- What is Wholesale Demand Response (WDR)? ⓘ
- When can I start participating in WDR? ⓘ
- What is a demand response service provider (DRSP)? ⓘ
- How are Market Ancillary Service Providers (MASPs) affected by WDR? ⓘ
- What is a wholesale demand response unit (WDRU)? ⓘ
- How is a WDRU different from being a scheduled load? ⓘ
- What loads are eligible to participate in WDR? ⓘ
- What loads can be aggregated under the WDR mechanism? ⓘ
- What is the maximum responsive component (MRC)? ⓘ

2021 WDR forward agenda

Emily Brodie

Looking forward

MONTH:	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
KEY EVENTS	25 Mar: Final WDR guidelines published	1 Apr: Demand-side participation information portal opens		24 Jun: Open for WDR registration	5MS market trial	5MS market trial	WDR industry testing starts	1 Oct: 5MS starts 24 Oct: WDR starts
WDR CG	<ul style="list-style-type: none"> Update on MDM release Update on WDR participation guidelines (AER) Update on draft Baseline Eligibility, Compliance and Metrics Policy 	<ul style="list-style-type: none"> Update on Final WDR Industry testing strategy 	<ul style="list-style-type: none"> Update on <i>final</i> Baseline Compliance Eligibility & Metrics Policy 	<ul style="list-style-type: none"> Discussion on <i>draft</i> Industry testing plan 	<ul style="list-style-type: none"> Update on <i>final</i> Industry testing plan 			<ul style="list-style-type: none"> Final WDR CG (if needed)
								
OTHER	Q&A on final WDR Guidelines	Workshop: WDR settlement	Workshop: Registration, classification & aggregation		Q&A on registration, classification & aggregation	Q&A on Industry testing	Workshop: Portfolio management system	

Dispatch compliance update

Madison Pigliardo

PLACEHOLDER

- PLACEHOLDER: The updated slide pack that includes the 'Dispatch compliance update' will be distributed prior to the meeting.

Draft WDR guidelines

Greg Ruthven

WDR guidelines timing

Stage		Indicative dates
TWG #1		11 Aug 20
TWG #2		12 Oct 20
1st Round Consultation	Issues paper published	22 Oct 20
	Q&A session	23 Nov 20
	Submissions due on Issues Paper	27 Nov 20
2nd Round Consultation	Draft Report/Draft Guidelines published	21 Jan 21
	Q&A session	8 Feb 21
	Submissions due on Draft Report/Draft Guidelines	19 Feb 21
Final Report/Final Guidelines published		25 Mar 21

Draft guidelines – main changes since Issues Paper

- Spot price exposure
- 2 conditions for aggregation:
 - WDRU aggregations limited to load forecasting areas
 - DNSP endorsement (where applicable)
- DNSP review of WDRU aggregations in specified circumstances
- Relaxed telemetry requirements for dispersed WDRU aggregations
- Details of regional threshold methodology
- Timing requirements for baseline methodology development
- Provision of WDRU data to DNSPs

Q&A session – main discussion areas

- DNSP involvement in WDRM
- Telemetry requirements
- Application of regional thresholds
- Role (non-role) of WDRM for minimum demand

Break

10 minutes

Draft WDR industry testing strategy

Priti Zacharopoulos

Draft WDR industry testing strategy for comment

- *Draft WDR industry testing strategy* to be released for comment *Thu 25 Feb*
- It is a high-level document covering:
 - Scope of Testing
 - Test Approach
 - Test Environment
 - Dependencies and pre-requisites
 - Entry/Exit criteria
 - Defect Management Process
 - Test Management Governance
 - Responsibilities (AEMO & Participants)
 - Risks
- Please provide your feedback on the draft strategy by COB *Thu 11 Mar.*
- Final WDR industry testing strategy released Wed 31 Mar.

Next steps: Testing plan

- *WDR Industry Testing Plan* will be released in *June 2021*. It will cover:
 - Test Scenarios and sequence
 - Test Data Requirements
 - Test Schedule
 - Test Environment
 - Dependencies and pre-requisites
 - Entry/Exit criteria
 - Defect Management Process
 - Roles and Responsibilities (AEMO & Participants)
- Will provide WDR CG with opportunity to comment
- Final testing plan will be released *July 2021*

Overview of the Demand-side participation information portal

Magnus Hindsberger

Demand Side Participation Information portal

- During the early 2010s there was a recognition of an information gap for AEMO capturing demand-side participation (DSP) in its forecasting processes.
- To address this, in March 2015, the AEMC made a final rule determination on National Electricity Rule Clause 3.7D that enabled AEMO to request information on Demand Side Participation (DSP) from all registered participants in the NEM.
- Accordingly, as per NER 3.7D, AEMO was to develop a set of DSP Information Guidelines (DSPI) formalising the data collection process and the data collected. These guidelines were first published in 2017.
- For the collection of DSPI, AEMO has developed a portal known as the DSPI portal.

Who should use the DSP portal?

- All registered participants in the NEM have to submit DSP information each year, between 31 March and 30 April.
 - Participants with no DSP simply submit a null submission to acknowledge they have no DSP.
- In section A.4.1 of the WDR Final Determination, AEMC states that with regards to the DSP reporting requirement in 3.7D(b):
 - "... the Commission considers that this rule should be classified as a civil penalty provision to promote compliance with this obligation, given the importance to the market of obtaining demand side participation information and the relative difficulty to date in obtaining this information. The AER has indicated that it approves of this recommendation. "

DSPI portal and WDR

- Following consultation during 2020, the DSPI Guidelines have now been updated (as required in the WDR Rules Change):
 - <https://aemo.com.au/en/consultations/current-and-closed-consultations/dspi-guidelines>
- To match the changes made to the Guidelines, the DSPI portal is currently being updated, so it is ready for the April 2021 submission period.
- Key changes include:
 - WDR can now be reported.
 - Ability to report load increase programs in addition to net load curtailment.
 - Added bulk upload feature, making it easier for participants with many DSP programs to provide this information.

Entering information about WDR for the summer 2021-22

- For the April 2021 DSPI submission period, estimates of future WDR can be entered.
- These are the only WDR estimates AEMO will get in time for preparing the ESOO 2021 forecast.
- Please submit your best estimate of the level of WDR (in MW) expect to be able to bid in for the summer 2021-22.

	Current DSP activities		WDR activities	
Registered participant also intending to register as DRSP	Need to supply a response	Mandatory	<ul style="list-style-type: none"> • Submit using existing participant ID • The information is to be entered as a future DSP program • Tick the box indicating this is intended to be used as WDR 	"Voluntary"
Intending DRSP (not currently registered)	n/a	n/a	Provide information via email before 1 May 2021: To: energy.forecasting@aemo.com.au Subject: WDR forecast data – [Company Name]	Voluntary

Using the DSP portal

- AEMO's DSPI portal is accessed through the Markets Portal (MarketNet).
 - <https://portal.prod.nemnet.net.au/>
 - <https://portal.prod.nemnet.net.au/help/Content/Index.htm>
- DPSI webpage with user guide:
 - <https://aemo.com.au/en/energy-systems/electricity/national-electricity-market-nem/nem-forecasting-and-planning/forecasting-approach/forecasting-and-planning-guidelines/demand-side-participation-information-guidelines>
 - Updates to the user guide and dates are coming, pending the completion of the portal upgrades (due early March 2021).
- Needing help:
 - User guide has a section with key reference documents to help out accessing the portal and completing the survey.
 - Further enquiries via AEMO's Support Hub <https://aemo.com.au/en/contact-us>

Stakeholder engagement survey

Chetna Mishra

Stakeholder engagement survey

- After this meeting, you'll receive an email link to a quick survey.
- As we are half-way through the program, this is a mid-point check on how you are finding WDR engagement.
- The survey:
 - Takes 2 minutes to complete
 - Closes Tue 23 February 2021
- Survey results will:
 - Guide the way we conduct future WDR forums and workshops
 - Help us identify areas of improvement to offer more effective stakeholder engagement.
- If you have further feedback or comments that aren't covered in the survey, feel free to write to wdr@aemo.com.au

Debrief on DNSP/WDR workshops

Ruth Guest

Overview of DNSP interactions on WDR

Interaction	Date	Overview
Early discussions	Aug 20	<p>AEMO sought early information on impacts of WDR to distribution network planning and operations.</p> <p>Broadly, impacts related to technical issues (impedance, voltage, flow management) stemming from lack of visibility of:</p> <ul style="list-style-type: none">• Real-time WDR data• Aggregation composition (quantity and location)• MRC value at each connection point.
DNSP workshop #1	26 Oct 20	<ul style="list-style-type: none">• Developed a full list of WDR issues affecting DNSPs.• Identified potential mitigations and opportunities, where feasible and:<ul style="list-style-type: none">• Within constraints of the National Electricity Rules (NER)• Mindful of the relative regulatory roles of AEMO and DNSPs
DNSP workshop #2	11 Dec 20	<ul style="list-style-type: none">• Responded to topics and action items that were raised at the first DNSP meeting• Discussed aspects of the draft WDR guidelines that affect DNSPs
<i>Draft</i> WDR Guidelines	21 Jan 21	<p>As discussed earlier, <i>draft</i> WDR Guidelines contain information on:</p> <ul style="list-style-type: none">• Role of DNSPs in reviewing proposed WDRU aggregations• Sharing of data on WDRU classification and aggregation with DNSPs
Q&A: Draft WDR Guidelines	8 Feb 21	<ul style="list-style-type: none">• Discussion around the role of DNSPs in reviewing proposed WDRU aggregations



General questions

Ruth Guest

WDR contact and information



Mailbox

wdr@aemo.com.au



WDR program information

<https://aemo.com.au/initiatives/trials-and-initiatives/wholesale-demand-response-mechanism>



WDR stakeholder engagement options

<https://aemo.com.au/consultations/industry-forums-and-working-groups/list-of-industry-forums-and-working-groups/wdr>

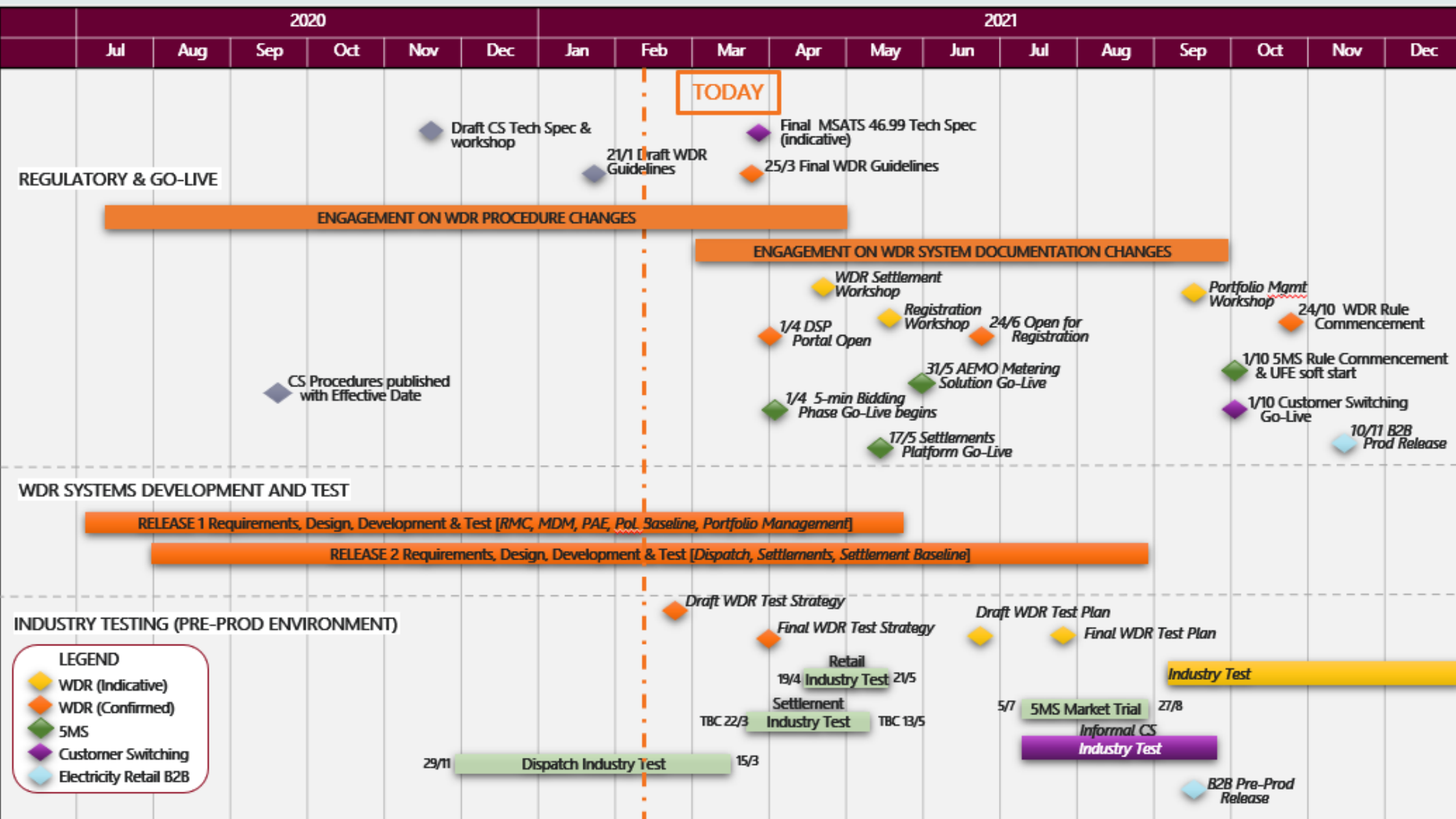
Thank you for your
participation!

APPENDIX A

Indicative program schedule

Indicative program schedule

****Current as of 10 FEB 21****
Includes updates for 5MS
delivery changes



APPENDIX B

Procedure changes timeline

Procedure change timelines

Current as of 10 FEB 21

Procedure package	Consultation Paper	Round 1 Consultation	Draft	Round 2 Consultation	Final
WDR Guidelines	Thu 22 Oct 2020	Fri 27 Nov 2020	Thu 21 Jan 2021	Fri 19 Feb 2021	Thu 25 Mar 2021
Settlements and Prudentials procedure – CLP	Fri 04 Sep 2020	Fri 16 Oct 2020	Thu 12 Nov 2020	Fri 4 Dec 2020	Mon 18 Jan 2021
Settlements and Prudentials procedure - Estimations	Thu 05 Nov 2020	Fri 18 Dec 2020	Mon 18 Jan 2021	Wed 10 Feb 2021	Thu 4 Mar 2021
Retail procedures & B2B guide	Mon 12 Oct 2020	Tue 17 Nov 2020	Tue 15 Dec 2020	Tue 02 Feb 2021	Tue 16 Mar 2021
Market & System Operations procedures	Fri 09 Oct 2020	Tue 17 Nov 2020	Fri 11 Dec 2020	Fri 29 Jan 2021	Fri 12 Mar 2021
Demand-side participation information guidelines	Wed 26 Aug 2020	Wed 30 Sep 2020	Wed 11 Nov 2020	Wed 25 Nov 2020	Fri 18 Dec 2020
Baseline Eligibility, Compliance and Metrics Policy	Fri 18 Dec 2020	Fri 5 Feb 2021	5 Mar 2021	26 Mar 2021	30 Apr 2021

APPENDIX C

Project and system document changes

Project and system document change timelines

****Current as of 10 FEB 21****

Area	Document	Early version released	Comments due	Updated version published
DISPATCH COMPLIANCE	Post-event dispatch compliance framework	Mar 2021	Apr 2021	Apr/May 2021
TESTING	WDR Industry test strategy	25 Feb 2021	11 Mar 2021	31 Mar 2021
	WDR Industry test plan	Jun 2021	Jul 2021	Jul 2021
WHOLESALE – EMMS	EMMS technical specification	Apr 2021	mid May 2021	31 May 2021
	Data Interchange (DI) online help	Aug 2021	n/a	Sep 2021
PORTFOLIO MANAGEMENT SYSTEM	Guide to Portfolio Management System (PMS)	mid Aug 2021	late Aug 2021	mid Sep 2021
	Markets Portal online help (PMS updates)	mid Aug 2021	late Aug 2021	mid Sep 2021
RETAIL – MSATS/eMDM	MSATS technical specification	mid May 2021	early Jun 2021	early Jul 2021
	New or updated MSATS/eMDM guides	Early Jun 2021	mid Jun 2021	early Jul 2021

EMMS Data Model script: WDR updates



The Electricity Data Model is the definition of the interface to participants for NEM wholesale data published by AEMO. A database conforming to the Electricity Data Model can contain a local copy of all current participant-specific data recorded in the main NEM database.

Detailed information on the packages, tables and reports in the Electricity Data Model are set out in supporting guides:

<https://www.aemo.com.au/energy-systems/market-it-systems/electricity-system-guides/wholesale-it-systems-software>

