

# New EMR Portal Update – Survey Responses and Q&A

1<sup>st</sup> February 2023

EMR Delivery Body



## Session Details

The Delivery Body ran a webinar with Electricity Market Reform (EMR) customers on 01/02/2023 to describe the current challenges being encountered on the New Portal delivery project and gain insights from customers on three delivery options identified.

This session had 102 external participants and we welcomed questions and feedback verbally via Microsoft Teams or via Slido questions.

We ran two Slido polls to gain views on the options presented.

The EMR Delivery Body would like to thank all those that attended and contributed in the webinar.

Further details are provided in the following slides.

# Survey 1 - Criteria considered to assess different options

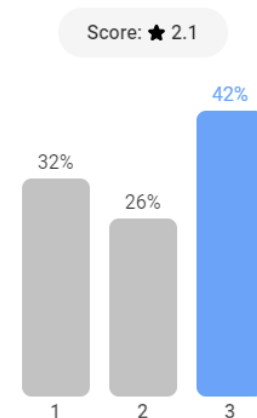
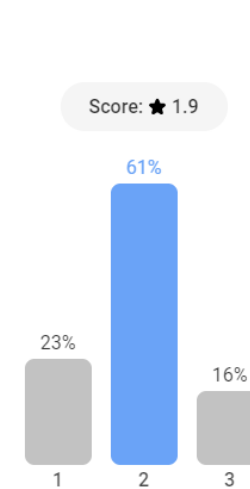
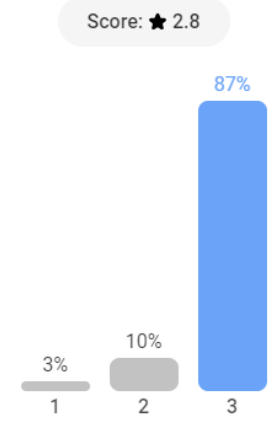
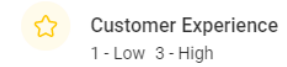
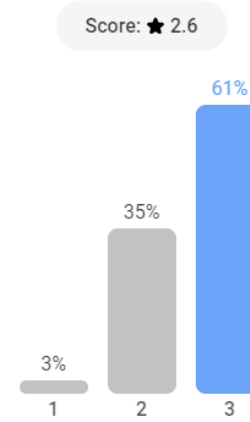
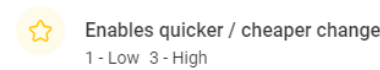
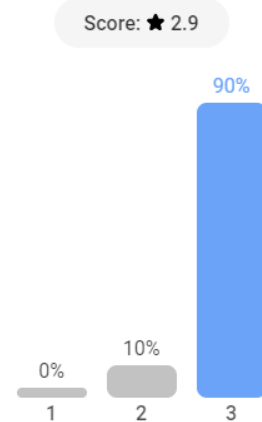
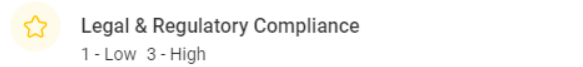
	Definition	Metrics	Survey responses
<b>Legal/ Regulatory Compliance</b>	<ul style="list-style-type: none"> <li>Ensure ESO meets the obligations of all relevant regulations, rules, licence and business plan obligations and does not increase compliance risks.</li> </ul>	<ul style="list-style-type: none"> <li>RIIO-2 plan delivery.</li> <li>Rule/licence compliance incidents.</li> <li>Offline processes integrated in to new portal.</li> </ul>	DB: 3 (High) Customer: 2.9 (High) 31 responses
<b>Enables quicker / cheaper change</b>	<ul style="list-style-type: none"> <li>Enables flexibility required to implement future change.</li> </ul>	<ul style="list-style-type: none"> <li>Equivalent cost of functional change delivery to the existing and new portal.</li> <li>Time taken from requirement to implementation.</li> </ul>	DB: 3 (High) Customer: 2.6 (High) 31 responses
<b>Enhanced Customer Experience</b>	<ul style="list-style-type: none"> <li>Delivers benefits to customers, stakeholders, delivery partners and consumers through an improved user experience.</li> <li>Enables the opportunity for customers to provide feedback and familiarise themselves with the portal prior to operational use.</li> </ul>	<ul style="list-style-type: none"> <li>Customer satisfaction survey on Portal.</li> <li>Reduces customer pain points.</li> <li>Enables self-serve.</li> <li>Evidence that customer feedback is considered &amp; integrated in the new portal.</li> </ul>	DB: 3 (High) Customer: 2.8 (High) 31 responses
<b>Delivery Cost</b>	<ul style="list-style-type: none"> <li>The extent that the cost of the programme aligns with the investment proposal in BP2 including risk margin.</li> </ul>	<ul style="list-style-type: none"> <li>Outturn cost against approved Business Plan allowances.</li> </ul>	DB: 2 (Medium) Customer: 1.9 (Medium) 31 responses
<b>Project Delivery efficiency</b>	<ul style="list-style-type: none"> <li>Maximises efficiencies in the overall project delivery plan.</li> </ul>	<ul style="list-style-type: none"> <li>Complexity and time required in data migration from the current to new portal.</li> <li>Requirement for duplication of processes between existing and new portal processes.</li> </ul>	DB: 1 (Low) Customer: 2.1 (Medium) 31 responses

# Survey 1 - Criteria considered to assess different options

## Quantitative feedback

We received 31 responses to the first poll and these results largely supported the Delivery Body's recommendation which was presented.

The highest divergence was on the Project Delivery Efficiency where the majority of customers (42%, 13 customers) felt this was a high priority.



Area	DB view	Customer view
Legal & Regulatory Compliance	3 (High)	2.9
Enables quicker / Cheaper change	3 (High)	2.6
Customer Experience	3 (High)	2.8
Delivery cost	2 (Medium)	1.9
Project Delivery Efficiency	1 (Low)	2.1

# Survey 1 - Criteria considered to assess different options

## Qualitative Feedback

Customers were also asked “Provide details of any additional criteria you feel should be considered and its criticality (Low, Medium or High).” with a free text response. Those responses were

- deliver please, think differently
- cost and efficiency are inextricably linked.
- preference for project to be delayed rather than take risks on compliance or user experience
- You need a smooth one time transition. The new system must be able to flex as rules change. Don't move if you can't offer this.
- Legal/Regulatory is a given but the security of supply is vital

# Survey 2 - Delivery Plan Options - Summary

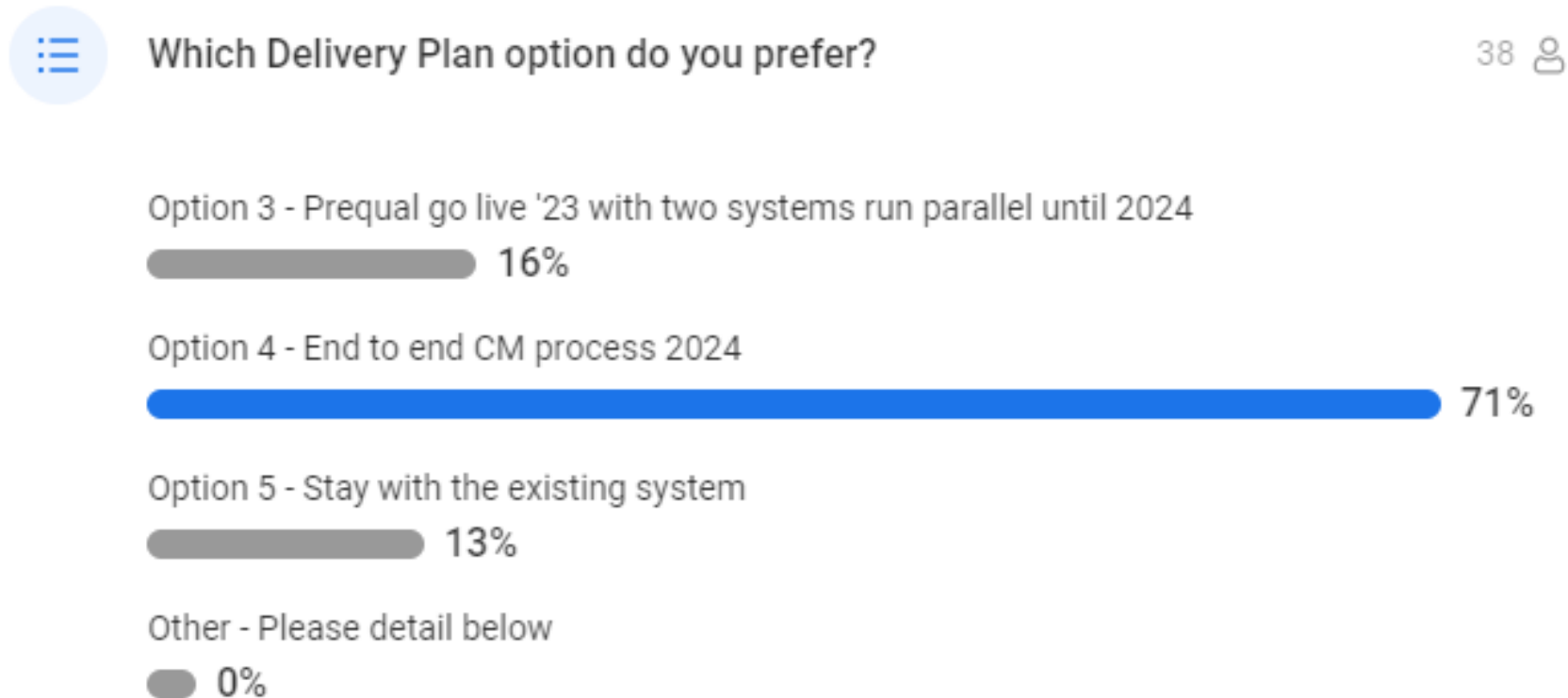
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	Pros	Cons	Survey Responses
1. Deliver all CM processes in time for Prequalification 2023	<ul style="list-style-type: none"> <li>The new portal can be used for PQ and AM from 2023 Prequalification onwards.</li> </ul>	<ul style="list-style-type: none"> <li>Minimal opportunity for customer feedback and familiarisation.</li> <li>Requires major reduction in scope of the 2023 release, with a high backlog of future change to deliver across BP2.</li> <li>High likelihood that the delivery plan will fail.</li> <li>Restricts delivery to "As is" business processes, reducing the opportunity for process improvements.</li> </ul>	Not offered as viewed as unfeasible by Delivery Body
2. Deliver the new Prequalification processes for 2023, Agreement Management on existing portal until post Auction 2025.	<ul style="list-style-type: none"> <li>The new portal can be used for PQ in 2023.</li> <li>Enables the 2023 operational timeline to be met.</li> </ul>	<ul style="list-style-type: none"> <li>Relies on Prequalification and Auction data being migrated back to the existing portal at significant additional cost.</li> <li>The existing and new portal will have to run parallel to each other, requiring a duplication of processes leading to risk of errors</li> <li>Extended long release period for AM functionalities</li> </ul>	Not offered as viewed as unfeasible by Delivery Body
3. Deliver the new Prequalification processes for 2023, Agreement Management on existing portal until post Auction 2024 <u>with parallel processes manually replicated.</u>	<ul style="list-style-type: none"> <li>The new portal can be used for 2023 Prequalification.</li> <li>Enables the 2023 operational timeline to be met.</li> </ul>	<ul style="list-style-type: none"> <li>The existing and new portal will have to run parallel to each other until CAN release post Auctions in 2024.</li> <li>Customers and the Delivery Body would need to repeat some business processes in both systems leading to a risk of error and data integrity challenges.</li> <li>Still requires a reduction in the scope of the initial release, especially to support delivery of PQ rule changes for 2023.</li> </ul>	Supported by 16% of 38 respondees (6 individuals)
4. Go live with full CM end-to-end process in 2024.	<ul style="list-style-type: none"> <li>More customer engagement in the full End to end process via dedicated requirement validation and familiarisation processes.</li> <li>Does not require any parallel run.</li> <li>Enables delivery of BEIS changes &amp; CMAG priorities</li> </ul>	<ul style="list-style-type: none"> <li>New portal won't be available for the PQ round 2023.</li> <li>Need to implement regulatory changes due in 2023 in the existing system for PQ.</li> </ul>	<b>Delivery Body Preference</b> Supported by 71% of 38 respondees (27 individuals)
5. Stay with the existing system	<ul style="list-style-type: none"> <li>The existing portal is understood by customers.</li> <li>Provides assurance that the operational plan can be delivered.</li> <li>Enables delivery of priority BEIS changes for PQ 2023</li> </ul>	<ul style="list-style-type: none"> <li>Won't include the user experience improvements that the Salesforce product offers.</li> <li>Challenge of delivering future changes quicker &amp; cheaper.</li> <li>Upgrading the portal in the future will be more complex.</li> <li>Stranded investment in the new portal to date.</li> </ul>	Supported by 13% of 38 respondees (5 individuals)

# Survey 2 - Delivery Plan Options - Summary

## Quantitative feedback

We received 38 responses to the second poll and again these results largely agreed with the Delivery Body's recommended delivery option presented.



# Survey 2 - Delivery Plan Options - Summary

## Qualitative feedback

Again customers were asked for any other comments at this point. They responded:

- [Option 5] I am unclear on the advantages of moving to the new system.
- [Option 4] I do think that the new Portal looked promising so think it should be implemented
- [Option 4] There is only one viable option here. The concern is that I've sat on exactly the same call several times now where a new portal is promised the following year.
- [Option 4] Assuming the new portal can deliver future changes easily.



# Event Questions & Answers (1)

**Question: Is this a separate portal than the one that was provided in 2022 for the registration of companies and users**

Response: No, this is the same portal as was provided for the first release of functionality in early 2022. When the portal project implementation was delayed from the 2022 PQ round, the Delivery Body took the decision to remove access to the New Portal to ensure clarity to customers on the correct system to operate on. Access will be restored at an appropriate time in the relevant Delivery Plan agreed.

**Question: Was the deliverability impact of new rules properly assess when agreed. & Question: How confident are you that the new portal will be resilient to future changes given that we may see a significant pivot required from REMA?**

Response: As the Delivery Body, we are responsible for ensuring the delivery of policy change to ensure that EMR markets are fit for purpose. The Salesforce product has been selected due to its inherent flexibility to deliver future change.

**Question: When the new portal is re-introduced will we need to remember/recover those user ids from 2022 or will we start afresh?**

Response: The Delivery Body are assessing this, with our preference to retain any information already provided by customers. Further information will be provided as the project progresses to ensure the process is clear for all parties.

**Question: If changes to the Rules are delaying the new Portal, and new Rules changes will continue indefinitely, how will the ESO catch up with the changes?**

Response: The Delivery Body work closely with BEIS, Ofgem and the Capacity Market Advisory Group to gain insight in to potential policy and rule change, so that the impact is clearly understood as early as possible.

## Event Questions & Answers (2)

**Question: To clarify, what will be the first year that prequalification activities take place using the new platform?**

Response: The Delivery has identified three Delivery Options for the New Portal, which are discussed further in the event. The Delivery Body recommendation is for the New Portal to be deployed in time for delivery of the Prequalification round to be run in 2024.

**Question: Maybe give the ESO a veto on any Rule changes following an assessment of cost to implement? & Question: Capacity providers agree a development budget. When the money is spent, no more Rule changes.**

Response: All rule and regulation changes are subject to industry consultation led by BEIS or Ofgem and assessed against the core policy intent of the relevant markets. The Delivery Body are provided an opportunity to voice our perspective and to advise on implementation feasibility and cost as part of the change process. As the energy industry evolves, it is essential that all markets are able to change to ensure that they meet objectives, we therefore do not believe a veto is appropriate.

**Question: Now you have the votes in, when will you make the decision? Knowing this well before Prequalification would be helpful & Question: When will you let us know the planned approach?**

Response: Our plan is to continue engagement with Delivery Partners to be able to make a decision on the confirmed Delivery Plan and by March/April. This will be communicated to our customers as soon as possible.