

# Data and Digitalisation (D&D) Annex template

The Data and Digitalisation Annex is the portfolio-level submission for all proposals routed to the ED3 data and digitalisation objectives. The purpose of the Annex is to set out the portfolio-level case for all proposals routed to D&D. It explains the scope and coherence of the portfolio, the rationale for routing individual proposals to D&D, provides a single structured index to the supporting evidence, and demonstrates how the portfolio delivers ED3 outcomes without duplicating material already set out in DJPs, BPDTs, CRBP submissions or other parts of the Business Plan.

## 1. Guidance

### 1.1 What this Annex is, and what it is not

This Annex should set out the portfolio-level strategy, scope, routing, interfaces and evidence map for all D&D proposals.

This Annex should not be used to repeat detailed option appraisal, full cost build-up, detailed project plans or solution-level design where this information is already provided elsewhere in the Business Plan. Where relevant material is already included in a DJP, CRBP submission, BPDT or other annex, it should be briefly summarised and clearly cross-referenced.

### 1.2 Suggested length

As a guide, the Annex should be 15 to 25 pages, excluding the Digitalisation Summary Index Table and any appendices. A shorter Annex is acceptable where the digital portfolio is smaller, provided it still answers the required questions. You should only use a longer Annex where needed to explain material cross-cutting dependencies or portfolio-level issues that cannot sensibly sit elsewhere.

## 2. Structure

### 2.1 Executive summary

Write a short summary of the D&D portfolio, the main outcomes it is intended to deliver in ED3, the total requested gross totex, the main dependencies and the most material risks to delivery of the D&D investments.

This section should be sufficiently clear that a reader unfamiliar with the wider Business Plan can understand what is being proposed, the rationale for the portfolio and where to look for more information.

## 2.2 Portfolio baseline and current state

Summarise your organisation's current digital baseline. This should draw on the latest published DSAP, progress against DBP, current digital products and services, operational network visibility, interoperability constraints, key data quality issues, and other evidence that explains the starting point for digital activities in the ED3 price control period. Where the proposed ED3 portfolio of investments builds on or depends upon earlier ED2 investments, this should be clearly stated.

Example: if the current issue is fragmented data flows between asset systems, customer systems and flexibility systems, say that plainly and explain where the evidence sits.

## 2.3 Strategic outcomes and target state

Set out the strategic digital outcomes for ED3, explain how the proposed portfolio of investments supports them, and what materially improves by the end of ED3.

The target state should be described using clear and simple language.

## 2.4 The Digitalisation Summary Index Table

Include a structured table listing every in-scope D&D investment line. At minimum, include:

- unique investment reference
- investment title
- gross ED3 totex
- primary ED3 D&D objective(s)
- D&D sub-category
- BPDT line reference(s)
- DJP reference
- relevant DSAP Action ID(s), where applicable
- interfaces with cyber resilience, IT and Telecoms, engineering investment proposals or other annexes, where applicable

The Index Table is the primary mechanism for ensuring traceability across the D&D portfolio. If the information provided is incomplete or unclear, this will hinder effective assessment of the submission.

## 2.5 Cross-cutting portfolio themes

This section should only include material themes that genuinely cut across multiple lines or programmes. This might include (but are not restricted to):

- DSI participation and readiness
- interoperability and standards

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- asset visibility and dynamic data
- ethical and proportionate use of AI
- major delivery dependencies with IT and Telecoms or CRBP
- major external dependencies, for example where policy is still developing

If a theme applies to only a single proposal, it should be addressed within the relevant DJP, not in this section.

### **2.6 Delivery confidence and portfolio assurance**

Explain how delivery will be governed across the D&D portfolio. This should cover:

- how you will prioritise and reprioritise if conditions change
- how you will track benefits at portfolio level
- how you will avoid duplication across evidence routes
- how you will use programme-level KPIs, if relevant
- how you will keep the portfolio aligned with DSAP and regulatory reporting without duplicating them

### **2.7 Appendices**

Only include appendices where they add material value. They should not become a second home for evidence that belongs in DJPs or BPDTs.