

Work Package	Tasks	Time Scale
Work Package 1	Complete high level requirements and benefits summary. Proceed with NIC submission and Ofgem application process	Jun - Aug '15
Work Package 2	Develop enhanced plan to support NIC application process Determine more detailed budget, project objectives and potential suppliers that will combine to create project team	Aug '15 - Feb '16
Work Package 3	Detailed assessment of existing market including existing procedures, services Identify and engage industry stakeholders Map responsibilities, financial and data flows High level requirements for any new systems, contracts, etc Appoint project partners and suppliers associated with design	Jan '15 - Aug '16
Work Package 4	Commence design proposals for new services and demarcation of responsibilities Designs for alternative responsibilities, financial and data flows incorporating DSO Designs for new systems Identify contractual and regulatory requirements Appoint project partners and suppliers associated with build	Aug '16 - Apr '17
Work Package 5	Implement designs for alternative responsibilities, financial and data flows incorporating DSO Implement designs for new systems incorporating DSO, SO and customers Engage with customers within trial area Establish 'Virtual BMU'	April '17 - Aug '18
Work Package 6	Trial new systems and processes Conduct regular stakeholder reviews Apply continuous improvements to processes based on review feedback	Apr '18 - Feb '20
Work Package 7	Evaluation conducted in parallel with operational phase. Produce comprehensive reporting of impact analysis Closedown report and recommendations to industry	July '18 - Apr '20

2015							2016								
E	JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP



2017

OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	.
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2018

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR
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2018

PR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
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Work Package	Tasks	Update in Response to Q30	Time Scale	2015 Q1 Q2 Q3 Q4	2016 Q1 Q2 Q3 Q4	2017 Q1 Q2 Q3 Q4	2018 Q1 Q2 Q3 Q4	2019 Q1 Q2 Q3 Q4	2020 Q1 Q2 Q3
Work Package 1	Stakeholder Engagement and Identify Trial Participants	Detailed analysis of the stakeholders both present within the trial area and those groups and industry bodies that will input and have an interest in the project Establish quarterly stakeholder forum that will inform and seek views on how the project will be delivered and obtain feedback on the way key aspects of the project are implemented. This has been used to great success with our current ARC project	Jun - Aug '15						
	Establish Stakeholder forum to identify and engage with potential stakeholders								
	Conduct market analysis to identify suitable participants	Review of market participants and the availability of DSR resource or network services providers from demand and generation perspective. This will allow the EVOLUTION team to understand the potential size of market under GSP							
	Create/guidance document to identify future participants	Provision of information to market participants on both the objective of the trial, how stakeholders can become involved, opportunities for both DSR, Generator, Storage Providers & Community Projects to benefit and how the DSO will link into the national system balancing market working with NGET over the course of the project. This will also involve working with NGET and existing DSR providers to explain the offering and how those services can be shared between SO and DSO							
	NGET interface resource	A huge part of the project will be establishing links with NGET and understanding how we operate and who we link into the new Electricity Balancing System and developing a project plan with NGET to take that work forward							
Work Package 2	Market Design	This aspect of the project that will review the existing market for balancing services and those actors connected under the GSP and develop a market solution where the DSO can create a market under the GSP that provides both those existing actors to benefit from local system balancing and also provide new opportunities for those stakeholders and customers connected to the distribution network who would otherwise not have the ability nor opportunity to engage and add value to national system balancing	Aug '15- Feb '16						
	Identify high level requirements for new contractual arrangements	Develop the contractual principles that will govern and support the rollout of the DSO model and development of contractual arrangements between market participants							
	Identify contractual and regulatory requirements	Ensure that a review of existing regulatory codes and license provisions are not compromised in any future commercial agreement.							
	Develop incentive scheme for trial	Compensation for customers taking part and charging structure that will underpin market and understand the role of the DSO and how they will be compensated for their activity - whether through trailer or mirror of SO regulation or incentives under a regulatory policy or based upon a more commercial merchant approach							
	Map responsibilities, financial and data flows between stakeholders	Process mapping to identify how response activity and services will be compensated for and flows of billing, invoices and payment in line with industry and new market mechanism at local level under GSP							
Work Package 3	Technical Solution Design	System interoperability, requirements for comms, requirements for sending and receiving signals for DSR and balancing services	Jan '15 - Aug '16						
	Identify high level requirements for new system interfaces	Linked to Stage 1 of WP3							
	Design the interface with the SO	Understand and design Comms requirements to make market work and link systems between DSO, SO and market participants, working with Strategic Comms providers							
	Design the interface with the Customers								
	Design control and communications processes								
Work Package 4	Identify Service Providers	Recruitment and contracting of market participants and developing a process for new participants to come forward and identify themselves and services they can offer Detail services that will be procured, type, instances of how many times we will call upon them etc	Aug '16 - Apr '17						
	Engage and enlist market participants	Linked to work with NGET and services that NGET SO may require for national system balancing which can be provided by the GSP BM unit							
	Design the role of the enlisted participants								
	Implementing processes from WP2 for solicitation services to National Grid ESB								
Work Package 5	Build and Test	Taking trial from design to live activity and implementation	April '17 - Aug '18						
	Incorporating DSO	Taking trial from design to live activity and implementation							
	Implement designs for new systems incorporating DSO, SO and customers	Taking trial from design to live activity and implementation, going out to tender for trading systems to operate in DSO local market and national system balancing							
	Procure trading platform	Taking trial from design to live activity and implementation, linked to WPI and stakeholder engagement Register with ILEXON Link to TBS and implement manual process that will facilitate trial in shorter term and agree this with NGET							
	Procure and establish communications framework								
	Engage with customers within trial area								
	Test external interface								
	Go-live								
Work Package 6	Evaluation and Dissemination	Knowledge dissemination Reporting the learning	Apr '18 - Feb '20						
	Monthly performance reporting conducted in parallel with operational phase.								
	Reporting on impact analysis								
	Closedown report and recommendations to industry Stakeholder events and industry conferences								