



# **Project plan**

## **ebIX<sup>®</sup> distributed flexibility project phase II**

Status: Approved by ebIX<sup>®</sup> Forum

Version: 1

Revision: 0.A

Date: May 26<sup>th</sup>, 2020

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## 1. Introduction

### 1.1 Background

After some years of exploration, flexibility is seen in the energy sector as a necessary tool to resolve (potential) problems in the security of supply. More and more system operators on transportation and distribution level will be forced to deploy flexibility products in resolving congestion and related problems in their network. There are a lot of local initiatives and there is a big need for directives for how to model and set up flexibility services.

Based on this, ebIX® started in the autumn 2017 a project to model an overview of the complete European flexibility services market. This first phase of the project had members from European DSOs, TSOs, data hubs and the industry organisations Eurelectric and USEF. The final report from phase one of the project; “[Overview of energy flexibility services](#)” was published in January 2020.

The “Overview of energy flexibility services” offers a structured description and overview of how a flexibility market can work. The overview takes the view of what it takes to offer flexibility services to the market, including a Flexibility Service Provider preparing for offering flexibility energy services, selling and delivering these services. After delivery of the flexibility services settlement is done between the parties affected. The document uses as much as possible the good work already done by other groups, as the TSO-DSO collaboration project and USEF.

The overview of energy flexibility services has an abstract level that in principle covers all kind of different flexibility services and applications, ranging from balancing services, congestion services to services for portfolio optimisation, hence the document intends to increase the general understanding of flexibility.

Now that the overview has been published, ebIX® intends to take the next step in properly model as Business Requirements Specifications (BRS) those areas of the flexibility market that belong to ebIX®’ responsibility. The intent is to start from this first broad overview of flexibility and drill down parts of it to a more detailed level.

### 1.2 References

- [1] [Overview of energy flexibility services.pdf](#), see <https://www.ebix.org/artikel/distributed-flexibility-project>.
- [2] [ebIX, EFET and ENTSO-E Harmonised Role Model 2019-01.pdf](#), see [https://www.ebix.org/artikel/role\\_model](https://www.ebix.org/artikel/role_model).

## 2. Target

The “Distributed flexibility project phase II” will make two Business Requirement Specifications (BRSs):

1. BRS for Energy flexibility services related to role of the Resource Aggregator;
2. BRS for Energy flexibility services related to the role of the Flexibility Settlement Responsible.

The **Resource Aggregator** is, according to the Harmonised Role Model [2]: “A party that aggregates resources for usage by a service provider for energy market services”.

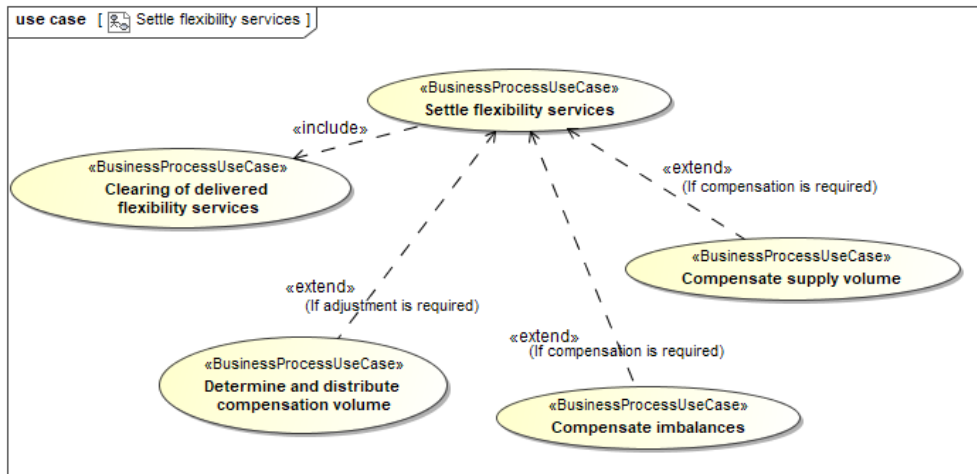
The **Flexibility Settlement Responsible**, is defined in the Overview of energy flexibility services [1] as a party that is responsible for settlement of the volume compensation (positive or negative) of the supplied energy for the delivered flexibility service by a Flexibility Service Provider.

Note that, due to the fact that a lot around the settlement of flexibility services is still unclear, especially those elements that are the responsibility of other groups, we may have to accept that not all processes in the “BRS for Energy flexibility services ” can yet be specified up to the desired detail.

## 3. Scope

The scope of the Distributed flexibility project phase II is:

- Detailing the information exchange of the processes related to the role of the Resource Aggregator, such as:
  - Exchange of master data, related to Customers, Accounting Points etc.;
  - Activation and deactivation of Resources by the Resource Aggregator (within downstream market);
  - Communication to/from the Resource Aggregator;
  - The process of aggregation of Resources.
- Detailing the information exchange of the processes related to the role of the Flexibility Settlement Responsible, based on the findings in the Overview of energy flexibility services [1]



- Prepare input for necessary update of the Harmonised Role Model (HRM) from ebIX®, EFET and ENTSO-E.

## 4. Pre-conditions

The following pre-conditions have been identified:

- The BRSs will be based on the published ebIX® overview of Energy Flexibility Services;
- Roles and domains from the Harmonised Role Model (HRM) are to be used;
- Work from EU-SysFlex Project and TSO-DSO collaboration will be taken into consideration.

## 5. Organisation

### 5.1 Participants in the project and their expected expertise

Participants in the project are expected to have knowledge of either national processes for the relevant distributed flexibility services, the ebIX® modelling approach, or preferably both.

The project will seek external participation, such as from Eurelectric, USEF and others.

Nominations can be sent to [secretary@ebix.org](mailto:secretary@ebix.org).

The project will report periodically and finally to the ebIX® Business Group (EBG).

The project will have members from EBG.

**Convenor:** To be nominated by EBG

**Secretary:** Edisys, NO

**Members:** TSOs

DSOs

Energy Suppliers

Eurelectric

USEF

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### 5.2 Proposed way of working

The basic work of the project will be done by telephone/web meetings and, when the Corona situation gets better, by two-day face-to-face meetings. It will be focus on homework.

The ebIX® Business Group (EBG) will nominate the convenor and the project members.

The final deliverables will be presented by EBG for approval in the ebIX® Forum on one of its bi-yearly meetings.

### 5.3 Costs

The project members will cover their own costs, including time used and travel costs.

ebIX® will pay for a Consultant/Secretary, estimated cost €45.000.

Under normal conditions it is expected approximately 7 two-day meetings in the project group, but as long as there are travel restrictions due to the Corona virus, the meetings will be run as more frequent web meetings with 2 hours duration at max. The physical meeting places will rotate between the participating countries and parties. In addition, electronic meetings will be organised in-between the face-to-face meetings.

### 6. Indicative planning

Under the assumption the project is approved in the ebIX® Forum meeting of March 2020 we estimate the following time schema:

Activity or milestone	2020		2021		
	Q3	Q4	Q1	Q2	Q3
Project meetings	◆	◆◆	◆◆	◆	◆
BRS for distributed flexibility services related to Resource Aggregator	→				
BRS for distributed flexibility services related to Flexibility Settlement Responsible		→			
Prepare input for necessary update of the Harmonised Role Model (HRM) from ebIX®, EFET and ENTSO-E			→		



## Appendix A ebIX® Overview of energy flexibility services

The report from the ebIX® energy flexibility services project phase I; “ebIX® Overview of energy flexibility services” [1] can be find at <https://www.ebix.org/artikel/distributed-flexibility-project>.