



Rules for the ebIX/ETC work

Status: Approved by ebIX Forum
Version/release: 1.2
Revision: C
Date: December 11th, 2023

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1 INTRODUCTION

1.1 About this document

This document describes the various tasks ETC is responsible for, such as maintenance of the ebIX standards and frameworks. The document is based on the ToR (Terms of Reference) for ETC and elaborates the various tasks in more detail.

1.2 ETC, ebIX Technical Committee

The ebIX Technical Committee (ETC) is a permanent working group under ebIX Forum and the work of ETC is done under ebIX Forum supervision. ETC is responsible for the technical part of the ebIX standards and will review and comment on all results from ebIX projects before they are presented to the ebIX Forum. ETC may review and comment on project proposals from the member of ebIX Forum before presentation for the Forum. All ebIX documents shall be in English language.

The ebIX Forum member(s) appoints the ETC members (one per country). Each ETC member can call upon other experts when needed. Observing members can become corresponding members of ETC.

The ETC elects its own convenor. The role rotates between the members on a yearly basis. The ETC can appoint a consultant that may act as secretary to the group.

1.3 Change log

| Ver. | Rel. | Rev. | Date | Changes |
|------|------|------|----------------------------------|---|
| 1 | 2 | C | December 11 th , 2023 | Since ebIX [®] is closing down from the end of 2023, the link to the ebIX [®] secretary has been removed. |
| 1 | 2 | B | June 7 th , 2018 | Removal of names and email addresses |
| 1 | 2 | | March 8 th , 2005 | 3.3, Responsibility for approval: Circulation for comments is changed into lasting for at least 4 weeks. On request of at least one core member this period will be prolonged for up to another 2 weeks |
| 1 | 1 | | November 18 th , 2004 | Addition of a requirement for yearly alignment of ebIX documents in chapter 3.4, Modification frequency and yearly alignment |

2 DEVELOPMENT OF ebIX TECHNICAL DOCUMENTS

ETC is responsible for maintenance of the ebIX technical documents, which includes:

- ebIX Domain model
- ebIX Modelling methodology
- ebIX Registries and repositories, including CCs (Core Components), BIEs (Business Information Entities) and templates
- ebIX Functional description
- ebIX syntax specific documents, such as:
 - Class diagrams for EDIFACT messages, such as UTILMD and UTILTS
 - The current ebIX EDIFACT IGs (for the foreseeable future)

2.1 ebIX Domain model

The ebIX Domain model describes a European energy market domain model. The processes are described using UML (Unified Modelling Language). The ebIX modelling methodology is used when maintaining the document.

2.2 ebIX modelling methodology

The ebIX modelling methodology is a document made as help for the ebIX working groups and projects. The methodology is based on international standards, such as UN/CEFACT Modelling Methodology (UMM) and UN/CEFACT Core Components Technical Specification.

2.3 Registries and repositories

The ebIX Registries and repositories will be based on international accepted standards and assure that it can be used for specifying syntax independent data models for the exchange of business documents. It will make ebIX information models, business documents, core components, templates etc available for interested parties, to make the development of ebIX information models and business documents as efficient as possible.

2.4 ebIX functional description

The purpose of the ebIX functional description is to ensure that information can be sent between parties in the European energy industry, in different countries, based on the same framework. The ebIX functional description contains common technical rules to be used when exchanging ebIX business documents. This includes:

Rules for data exchange

- A common ebIX interchange agreement.
- Acknowledgement , rejection and cancellation rules.
- Rules for communication addressing.

Data format rules

- Common technical rules, such as usage of time zones, measurement units, date formats, decimal places, rounding and identification of parties.
- Syntax specific rules for EDIFACT and XML, such as usage of character sets

2.5 ebIX syntax specific documents

This includes class diagrams for the EDIFACT messages used by ebIX. These class diagrams are to be used by the project groups while mapping from UML class diagrams to EDIFACT. In addition the current ebIX EDIFACT IGs (for the foreseeable future) will be maintained.

The ebIX Implementation Guides (IG) describes EDIFACT-messages, such as UTILMD (Utility master data message) and UTILTS UTILMD (Utility time series message) in detail. The IGs are framework documents to be used by ebIX projects and ETC when developing and maintaining the ebIX translation guides.

3 MAINTENANCE OF ebIX BUSINESS INFORMATION MODELS

3.1 Responsibility

ETC is responsible for maintenance of the ebIX business information model, including all syntax specific documents originally made by ebIX projects and other documents made by ETC.

3.1.1 Documents developed by ETC

ETC is responsible for the maintenance of the documents made by ETC, see 2 Development of ebIX technical documents.

3.1.2 ebIX business information models

New ebIX business information models will always be made in separate ebIX projects, while maintenance of the business information models may be done either by ETC or separate projects, dependent on the size of the change project.

3.1.3 ebIX translation guides

New ebIX translation guides will always be made in separate ebIX projects, while maintenance of the translation guides may be done either by ETC or separate projects, dependent on the size of the change project.

3.2 Version numbering

The ebIX documents shall have 2 levels of version numbering. This will be Version and Release. In addition there will be an Update number.

- The Version number (first number) will be updated when there have been major changes, such as structural changes of business information models and upgrade of the EDIFACT directory used by ebIX.
- The Release number will be updated when there have been small changes, such as changes to BIEs (Business Information Entity) in a business information model.
- The Update number will be updated when there have been minor changes, like correction of examples, adding new codes etc. These changes shall not influence existing implementations.

3.3 Responsibility for approval

ETC shall ensure that the maintenance procedures are respected.

- Smaller changes to the documents, resulting in a new release or update number on the document version, can be approved by ETC after circulation for comments within the ETC. The changes should be considered as accepted if there are no comments.
- ebIX Forum shall approve new basic documents or larger changes to existing documents, resulting in a new version number. The approval process is done by sending the relevant documents on circulation for comments among the ebIX Forum members. The changes should be considered as accepted if there are no comments.
- Circulation for comments should last for at least 4 weeks. On request of at least one core member this period will be prolonged for up to another 2 weeks.
- Change requests to ETC should be received by ETC at least 2 weeks before each meeting.

3.4 Modification frequency and yearly alignment

The following is intended principles to be used for the modification periods of documents.

- ebIX will only update documents on an “as needed” basis.
- ebIX will seek to obtain a certain level of stability.
- ebIX will seek to only maintain (make updates to) two consecutive versions of technical documents.

Every year, normally in spring/summer, ETC shall align the ebIX documents published to assure consistency between the documents. The alignments (changes) done shall be presented and approved by the ebIX Forum autumn meeting.

3.5 Maintenance request

All maintenance requests shall be sent to ETC via e-mail using the maintenance request form. ETC defines the maintenance request form.

The maintenance procedure is transparent to both market players and software providers.

The acceptance or rejection of the maintenance requests will be posted to the ebIX web site. The basic philosophy for a decision (approval/rejection) is through consensus.

The requestor for addition of new functionality or the modification of existing functionality shall provide UseCase and information flow diagrams positioning the new or modified functionality. Detailed explanatory text must also be provided.

The standard maintenance request form in a Microsoft Word format may be downloaded from the ebIX website (www.ebIX.org).

4 PUBLICATION

4.1 Registry and repositories

ebIX will maintain a central registry and repository on the ebIX web-page www.ebix.org.

The registry and repositories will follow the specifications from the ebIX/RegRep project.

4.2 ebIX web page

ETC is responsible for publication of the ebIX documents for which ETC is responsible. These will be published on www.ebix.org.

5 SUPPORT

ebIX aims to offer/organise implementation support for the ebIX standards and framework for new countries, currently user countries and ebIX projects.

ebIX may provide support for countries that prepare the implementation of standard information exchange based on the ebIX models. The objectives for this support are:

- To support the spread of the use of the ebIX standards
- To further the correct understanding of the standards
- To guard the correct implementation of the standards

5.1 For new members

The chairman of ebIX provides a project leader and assigns a budget. The support is in general limited to:

- A workshop with introduction to the relevant ebIX business information model(s).
- Additional support limited to 5 days (of 8 working hours).

The support is organised by ebIX ETC on request of the ebIX chairman.

5.2 ebIX check on national documents

ETC is available for audit of national implementation documents on request of market participants. The results of the audit will be published on the ebIX website. The audit is limited to the conformity to the ebIX documents.

6 HARMONISATION

One of the important tasks for ETC is to make sure that the ebIX standardisation work is harmonised with other standardisation bodies, both within the energy market and with other international data interchange standardisation bodies. The harmonisation work shall assure that ebIX follow the mainstream data interchange initiatives, so that electronic business can be implemented to as low cost as possible and be compatible with the mainstream developments in software.

ETC will represent ebIX in the bodies ebIX Forum decide to liaison with. Representatives are selected among the ETC members.

ETC is responsible for submitting change requests to UN/CEFACT.

Appendix A TERMS OF REFERENCE FOR ETC

ebIX Technical Committee - Terms of reference

1) Introduction

The ebIX Technical Committee (ETC) is a permanent working group under ebIX Forum. The group is responsible for the technical part of the standards and ebIX Forum can authorise it to approve modifications to the standards.

2) Relationship between ETC and ebIX Forum

- The work of ETC is done under ebIX Forum supervision.
- The ETC is funded by ebIX Forum.
- The ebIX Forum defines the tasks and projects carried out by ETC.
- ETC may review and comment on project proposals from the member of ebIX Forum before presentation for the ebIX Forum.
- ETC will review and comment all results from ebIX projects before they are presented to the ebIX Forum.
- Minutes from meetings in ETC should be distributed to participants at the meeting, to members of ETC and to all members of the ebIX Forum.
- ETC should inform the ebIX Forum of the work carried out in the latest period on each meeting of the ebIX Forum.

3) Tasks

ETC will:

- Maintain the ebIX technical documents, which includes:
 - A methodology based on international standards, such as UMM and Core Components Technical Specification from UN/CEFACT. UN/CEFACT are working with standardisation related to both XML and EDIFACT syntaxes.
 - Tools and rules for helping ebIX wg's work
 - Registries/repositories for Core Components, code lists, blueprints, document types etc.
- Harmonise information interchange principles with other standardisation bodies, such as ETSO and EFET.
- Participate in international standardisation organisations, such as UN/CEFACT.
- Administrate Data Maintenance Requests (DMRs) to international standardisation organisations, such as UN/CEFACT.
- Be responsible for publication of its activities and results as ebIX information.
- Organise implementation support for the ebIX standards.

4) Members, convenor and secretary

The ebIX Forum member(s) for each country may appoint an ETC member (one per country). Each ETC member can call upon other experts when needed. Observing members can become corresponding members of ETC.

The ETC elects its own convenor. The role rotates between the members on a yearly basis. The ETC can appoint a consultant that may act as secretary to the group.

5) ETC meetings

The ETC work group will meet when necessary. The meetings of the ETC will be hosted by the member organisations on a rotary basis.

Appendix B ebIX DOCUMENT MAINTENAINCE REQUEST

| | |
|---------------------------------|--|
| Submitter identification | |
| Submitter name | |
| Submitter organisation | |
| E-mail address | |

| | |
|---|--|
| Relevant document name and version | |
|---|--|

| | | |
|-------------------------|--------------------------------|--|
| Nature of change | Code request | |
| | Functional addition | |
| | Functional modification | |
| | Correction of text | |
| | Clarification of text | |

| |
|-------------------------|
| Request details: |
|-------------------------|

Appendix C CURRENT HARMONISATION EFFORTS BY ETC

Currently there are two identified harmonisation and standardisation activities where ETC will participate. These are the ETSO and ebIX harmonisation group and participation in CEN/ISSS/EBES/EEG1 and UN/CEFACT.

C.1 ETSO/TF-14 and ebIX harmonisation group

Both ETSO/TF-14 and ebIX are working with modelling and standardisation of electronic exchange of information in the European energy industry. While ETSO is working solely with exchanges towards the TSOs, ebIX tries to include the whole European energy industry.

To avoid overlap in the work of the two organisations and to assure that the working direction is the same, the harmonisation group has been established. This is a common sub-working group with members from the interested parties. The main objective of the harmonisation group is:

- Define a role model describing an overview of the relationship (and processes) between the roles and areas in the European energy market.
- Make a “best practice document”, including document content for processes and messages, rules for specification of messages, etc.
- Definitions of common objects.

C.2 CEN/ISSS/EBES/EEG1 and UN/CEFACT

ebIX, through ETC, is a member of CEN/ISSS/EBES/EEG1, which is the European Expert Group for trade. CEN/ISSS/EBES is among others the entry point for change requests (DMRs) to the UN/EDIFACT standard. Through the membership of CEN/ISSS/EBES/EEG1, ebIX is participating in the work of UN/CEFACT Forum. Through this membership ebIX ensures that the standardisation work being done within ebIX is harmonised with the international developments of UN/CEFACT.