

CER Data Exchange Industry Co-Design Terms of Reference

1 Project overview

1.1 The need

The Consumer Energy Resources Data Exchange (CER Data Exchange) Industry Co-design is a joint initiative between the Australian Energy Market Operator (AEMO) and AusNet Services to work collaboratively with industry to co-design a national CER Data Exchange. This Project is supported by a grant from the Australian Renewable Energy Agency's (ARENA's) Advancing Renewables Fund.

Currently, CER data is maintained and exchanged through a growing number of fragmented, often proprietary point-to-point connections, making the process complicated and inefficient. CER data exchange and access to it, should not be in the too hard basket. Global experience from jurisdictions such as the United Kingdom shows that with the absence of a national data exchange, organisations on behalf of customers must deal with a mine field of standards and data platforms to share CER information. This results in greater costs and reduced customer choice. In contrast, Australian CER trials have shown that a streamlined and secure data exchange between organisations is a much needed and critical enabler of CER integration and coordination.

This project is the first step of a multi-stage process that seeks to create a digital foundation that supports multiple organisations to share CER-related information through a secure exchange. Providing lower cost access for organisations to connect and support the development of new and innovative services will provide greater value to all customers. The CER Data Exchange initiative will be a key enabler for CER to be an integrated part of a customer-centric, affordable, and data-enabled electricity system.

1.2 Project objectives and scope

Through this co-design process, the Project team will work collaboratively with industry and affiliated stakeholders to collectively develop the high-level design of a national CER Data Exchange. This project aims to build industry alignment on the following aspects of a CER Data Exchange:

- **Design principles and guardrails** | Guiding the development of the functional aspects of the CER Data Exchange so that they meet the policy objectives.
- **Use cases** | Previous industry trials indicated that the use cases for the CER Data Exchange could include role-based data access, streamlined market prices access, dynamic operating envelopes (DOEs) and flexible export limits, retailer hedging, and local network support services. To enable

these use cases, foundational data exchange elements such as identity and access management, standing data availability and portfolio management will be considered in parallel.

- **Data governance** | What are appropriate data governance frameworks and scope including management of data (e.g., payloads, updates and versioning), and standardisation.
- **Ownership, Operation and Funding** | Including funding and business model, ownership and operational responsibilities.
- **Implementation** | Options on staged implementation and whether regulatory changes are required to enable the efficient operation of a CER Data Exchange.

This project **will not**:

- decide technology choices or develop a detail design – these will be considered in separate, subsequent implementation initiative.
- consider or develop communication protocols and control commands to CER devices.

1.3 Decision Making Process

This is open and collaborative process with a shared commitment to delivering genuine customer outcomes by working with industry to help shape the future. Stakeholders will have three options to participate in this co-design process.

The project team will consider all existing evidence and industry feedback collected throughout the project. These inputs will flow into decision making on the recommended high-level design and implementation roadmap published in this project’s Outcomes Report which will be circulated to policy makers.

The decision making will be guided by the National Electricity Objective (NEO), real world evidence and industry feedback and recommendations that come from this Project.

1.4 Consultant support

AEMO has appointed Mott MacDonald to support this project.

Mott MacDonald is responsible for providing project management and administration support to AEMO and AusNet Services, as well as subject matter and change management expertise. This includes drafting project material and reports, and managing stakeholder engagement, including the Expert Working Group and industry workshops.

2 Co-design process

We will provide industry and interested stakeholders’ multiple avenues to provide input into the development of the high-level design of the CER Data Exchange.

Expert Working Group	The Expert Working Group (EWG) will support the project team to shape this co-design program on topics or issues for discussion by providing expert input, strategic insights, and implementation considerations. It is made up of stakeholder representatives who responded to AEMO’s call for nomination at
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	<p>the commencement of the project. The members of the EWG were selected to provide a broad and balanced perspective and for their relevant experience.</p> <p>Further detail on the EWG is provided below.</p>
Industry workshops	<p>AEMO and AusNet Services will hold in-person public workshops to seek feedback from stakeholders. Each workshop will focus on a key aspect of the CER Data Exchange, and attendees will have the opportunity to provide feedback on materials developed by the project team and the EWG. Three workshops are currently planned:</p> <ul style="list-style-type: none"> • Workshop 1 (6 August 2024, Melbourne): scope and use cases • Workshop 2 (4 September 2024, location TBD): data governance, ownership, operation and funding • Workshop 3 (31 October 2024, location TBD): preferred option for implementation roadmap <p>AEMO will publish workshop presentation material and summaries following each workshop.</p>
Written feedback	<p>AEMO and AusNet Services welcome written feedback from stakeholders who are not able to participate in the EWG or attend industry workshops. Written feedback can be sent to: cerdataexchange@aemo.com.au.</p> <p>In addition, stakeholders can also provide written feedback to the project's Consultation Paper. See project outputs section below for more detail.</p>

3 Project outputs

In addition to the public industry workshops, AEMO will also publish the following documents.

Consultation Paper	<p>This paper will provide a detailed discussion of the topics covered in Workshops 1 and 2, and any recommendations from the EWG and/or stakeholders that AEMO has adopted where applicable.</p> <p>The consultation paper provides an opportunity for all stakeholders to provide written feedback on the design principles and guardrail requirements, use cases, data governance, ownership, operation and business models. Feedback on the consultation paper will form part of the discussion in Workshop 3, which will focus on the preferred implementation option and roadmap.</p> <p>AEMO will publish the consultation paper ahead of Workshop 3, around 16 September 2024., with written submissions due in around early October 2024. A summary of stakeholder submissions will be published on the project webpage.</p>
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<p>Outcomes report and public webinar</p>	<p>This report will discuss how the co-design process and stakeholder feedback has informed the development of the project's recommendations. The report will also include an implementation roadmap and indicative costs if there is industry alignment on the next step.</p> <p>AEMO expects to release the Outcomes report in mid- to late November 2024. AEMO also plans to hold a public webinar to present the findings of the project and recommendations from the Outcomes report shortly following its release.</p>
<p>Knowledge Sharing report</p>	<p>The Knowledge Sharing report will outline the project team's journey and strategy of applying a change management framework to progress customer outcomes including:</p> <ul style="list-style-type: none"> • The general approaches used to set a case for consultation, propose options, seek feedback, and build agreement. • The techniques used to facilitate alignment such as surveys, co-design methods, and conceptual synthesis. • What investment is required in these broad collaboration and change management initiatives. <p>AEMO expects to release the Knowledge Sharing report in mid- to late November 2024.</p>

4 Role of the Expert Working Group

4.1 Objective

This project will take a highly collaborative approach to engagement – giving industry opportunities shape the CER Data Exchange design through an expert working group, industry workshops, and public consultation.

The EWG is a critical collaboration forum and will involve a wide range of industry representatives. We aim to work collaboratively together to inform the high-level design and Implementation Roadmap of the CER Data Exchange – including the fundamental requirements and guardrails.

The EWG is expected to provide informed feedback on the various use cases and contribute to the development of design options – which will be an input into three broader industry workshops.

The EWG's input, advice and guidance will be incorporated into decision making on the recommended high-level design and implementation plan published in this project's outcomes report – considering all evidence and broader industry and consumer feedback.

4.2 Expert Working Group selection and meetings

EWG members were selected to provide a broad and balanced perspective, and for their relevant experience and expertise, following AEMO's public request for nominations.

The EWG will meet fortnightly for the life of the project. Members are expected to:

- attend most meetings.

- come prepared to meetings – including reviewing any pre-reading and presentation material.
- provide constructive feedback on meeting agenda items.
- respectfully contribute to meeting group discussions and brainstorming sessions
- provide written feedback, as requested.
- review meeting summary material
- as requested by the secretariat, arrange for subject matter expert(s) to attend on an ad-hoc basis for targeted topics.

Any expenses incurred by EWG members attending meetings, or undertaking activities associated with the CER Data Exchange Industry Co-design actions, agendas or meetings are at the expense of the member's employer.

4.3 Expert Working Group administration

Our supporting consultant, Mott MacDonald, will provide the secretariat function to the EWG. A senior member from Mott MacDonald will chair EWG meetings. Project team members from AEMO and AusNet Services will also attend and contribute to these meetings.

To promote transparency, in addition to workshop presentations, workshop summary reports and the public consultation paper and responses, we will publish Expert Working Group meeting material (e.g., agendas) and summaries of Expert Working Group feedback on the AEMO project webpage.

4.4 AEMO Competition Law Meeting Protocol

AEMO is committed to complying with all applicable laws, including the Competition and Consumer Act 2010 (CCA). In any dealings with AEMO regarding proposed reforms or other initiatives, all participants agree to adhere to the CCA at all times and to comply with this Protocol. Participants must arrange for their representatives to be briefed on competition law risks and obligations.

Under no circumstances must Participants share Competitively Sensitive Information. Competitively Sensitive Information means confidential information relating to a Participant which if disclosed to a competitor could affect its current or future commercial strategies, such as pricing information, customer terms and conditions, supply terms and conditions, sales, marketing or procurement strategies, product development, margins, costs, capacity or production planning.

5 Expenses

Any expenses incurred as a result of invitees attending meetings and workshops, or undertaking activities associated with the CER Data Exchange Industry Co-design actions, are at the expense of the organisation that the person represents.

6 Background

Australian households and businesses have embraced CER at rates unparalleled across the globe. Consumer adoption of rooftop solar systems grew 25 per cent year-on-year over the past five years, with the uptake of energy storage, electric vehicles and new technologies such as energy management systems set to follow similar trajectory.

Across the electricity sector, governments, market bodies, consumer groups, academia and energy businesses are implementing reforms and taking actions to make CER an integrated and coordinated part of the electricity system.

The CER Data Exchange is part of this program of work and is the next logical step forward to take full advantage of the benefits CER can provide.

The coordination of CER will play a crucial role in Australia’s transition to Net Zero, if enabled at scale. This objective cannot be achieved through large scale renewable resources alone.

The benefits of a national CER Data Exchange will be:

- Support greater customer choice.
- Reduce cost to serve customers.
- Support entry of new and innovative products.
- Provide a flexible foundation to enable future needs.

When properly integrated, CER can provide significant benefits to all consumers. For individual customers, CER can help lower their energy bills and deliver additional value through new energy services. For the system as a whole, CER can reduce overall system cost by minimising grid scale generation as well as transmission and distribution network investment. CER can also provide services that support a more reliable and resilient grid; however, these benefits cannot be realised without effective coordination between industry bodies, service providers and consumers. Version control and contact details

Version	Effective date	Comments
1	13-05-2024	Initial Draft
2	08-07-2024	Final Version

For more information on the CER Data Exchange Industry Co-Design Project Including progress and outcomes, please visit the [CER Data Exchange Industry Co-design](#) webpage or email cerdataexchange@aemo.com.au