

ERA SRSM Project

Project Plan

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Name	Title	Signature	Date
SRSM Steering Group			

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1 DOCUMENT CONTROL

1.1 Version History

Version	Date	Author	Description
0.1	04.10.06	Jason Brogden	Initial Draft

1.2 Quality Reviewers

Name	On behalf of	Review Focus
Simon Harrison	SRSM Project Management	Format and content
SRSM Steering Group	ERA suppliers	Appropriateness and Content from v0.1

1.3 Distribution List

Name	Role	Location
ERA Suppliers		

1.4 Glossary & Abbreviations

Term	Meaning
SRSM project	Supplier Requirements of Smart Metering project

1.5 Intellectual Property Rights and Copyright

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2 INTRODUCTION

2.1 Purpose of this Document

The purpose of this document is to define the more detailed plan for delivery of the Supplier Requirements for Smart Metering (SRSM) Project.

This document builds on the SRSM Project Terms of Reference/Project Brief.

The plan will become a living document for the management of delivery, but a snapshot version will be approved and baselined by the SRSM Steering Group.

This document describes:

- the products for the SRSM project;
- their development and review cycles;
- their acceptance criteria;
- the interdependencies between them; and
- the detailed plan for their delivery.

3 SRSM PROJECT DELIVERABLES

The project has been structured into 5 workstreams to help to manage the work to delivery and the products are allocated to those workstreams to add clarity to this section. These are:

- Project Management
- Smart Metering Specification
- Interoperability
- Industry Impact Assessment
- Communications and Stakeholder Management

The dependencies between the deliverables are described in the Product Flow Diagram in Section 5.

The overall timing of the activities is shown in a detailed project plan in Section 6.

The quality plan for each product is shown with the development and review cycle and the approval milestone for each product shown.

3.1 Project Management Workstream

3.1.1 Project Plan

This document.

Review Cycle:

- Peer Review with Project Team
- Review with SRSM Steering Group
- Update
- Review with SRSM Steering Group

Approval – SRSM Steering Group

Approval Milestone – October 2006 Steering Group Meeting

3.1.2 Highlight Reports

The project manager will provide a fortnightly project Highlight Report which will be distributed to the SRSM Project Steering Group and any other stakeholders agreed by the SRSM Steering Group. The format will be as in the Highlight Report distributed at the September SRSM Steering Group.

Review Cycle:

Peer Review with Project Team

Approval – SRSM Project Manager

Approval Milestone – fortnightly, alternate ones being one week prior to the SRSM Project Steering Group meeting.

3.1.3 Project Evaluation Report

A Project Evaluation Report (PER) will be important to allow the SRSM project to be reviewed, record the achievements of the project and to ensure that lessons learned can be taken forward to any future phases of work or projects.

It will contain a description of the achievement of the SRSM project against: objectives; cost; and product delivery to time and quality.

Review Cycle:

- Peer Review with Project Team
- Review with SRSM Steering Group
- Update
- Review with SRSM Steering Group

Approval – SRSM Steering Group

Approval Milestone – January 2007 Steering Group Meeting

Following Approval of the PER by the SRSM Steering Group, it will be presented to the March ERA Board meeting for information as the project sponsors.

3.1.4 Consideration of Further Work

Further work on smart metering will be considered and any deemed suitable for further action will be identified to be taken forward by whatever method is appropriate at the time.

Any further work will need to be sanctioned by the ERA Board and it will be important to have a view on this whilst the project team is still in place, therefore the target is to present a paper to the January ERA Board for their consideration

Review Cycle:

- Peer Review and review with SRSM Steering Group Chair
- Presentation to December SRSM Steering Group
- Peer Review and review ERA Board paper with SRSM Steering Group Chair
- Update and issue paper to January ERA Board Meeting

Approval – ERA Board

Approval Milestone – January 2007 ERA Board Meeting

3.2 Smart Metering Specification Workstream

3.2.1 V1.0 Electricity Smart Meter Functional Specification

This will be an agreed baseline of the functional specification that can form the basis of development work through the project and can be distributed to a selected consultation.

The format and content of the specification will be as already developed up to v0.5.

The approval of this document has been set to be with the Project Manager. Addressing all comments on the specification satisfactorily will result in a version agreed with workstream members. It is not envisaged that a review and approval cycle with the SRSM Steering Group is necessary.

Review Cycle:

- 3 workshops to review, develop and agree the first baselined version
- Updates by the Project Team
- Final version agreement by workshop correspondence

Approval – Project Manager

Approval Milestone – end October 2006

3.2.2 V1.0 Gas Smart Meter Functional Specification

This will be an agreed baseline of the functional specification that can form the basis of development work through the project and can be distributed to a selected consultation.

The format and content of the specification will be as already developed up to v0.3.

The approval of this document has been set to be with the Project Manager. Addressing all comments on the specification satisfactorily will result in a version agreed with workstream members. It is not envisaged that a review and approval cycle with the SRSM Steering Group is necessary.

Review Cycle:

- 3 workshops to review, develop and agree the first baselined version
- Updates by the Project Team
- Final version agreement by workshop correspondence

Approval – Project Manager

Approval Milestone – end October 2006

3.2.3 Smart Meter Functional Specification Consultation Complete

This product is associated with the successful completion and delivery of the consultation process of the smart meter functional specifications.

Review Cycle:

- 3 week review with selected recipients of smart meter functional specifications
- Seminar hosted by SRSM project to answer questions and give the opportunity for feedback/interaction with stakeholders
- All input received by consultees

Approval – Project Manager

Approval Milestone – late November 2006

3.2.4 V2.0 Electricity Smart Meter Functional Specification

This will be the final agreed baseline of the functional specification that will form the Supplier statement of smart meter functionality.

The format and content of the specification will be as already developed up to v1.0.

The approval of this document has been set to the SRSM Steering Group as this is the key final output of the project.

Review Cycle:

- 1 workshop to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone – December 2006 Steering Group Meeting

3.2.5 V2.0 Gas Smart Meter Functional Specification

This will be the final agreed baseline of the functional specification that will form the Supplier statement of smart meter functionality.

The format and content of the specification will be as already developed up to v1.0.

The approval of this document has been set to the SRSM Steering Group as this is the key final output of the project.

Review Cycle:

- 1 workshop to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone – December 2006 Steering Group Meeting

3.2.6 Data Items

The SRSM Data Item product will provide Suppliers and other industry parties with a single agreed reference of the data items required to operate a fully interoperable smart metering infrastructure in the UK.

The product will comprise mainly of a table listing data items required by the smart metering functionality specified within related products.

Wherever relevant, the table will refer to existing industry definition of the data items. If a data item required by smart metering functionality is not present in industry documentation, or the existing definition is not relevant, the product will include the new definition. Any new data items will be defined to include format, type, length etc.

Where data items are identified as a result of interoperability requirements, these will be documented in a format consistent with that used for meter data items.

There is a dependency defined from the output of the third workshops for both the gas and electricity smart meter functional specifications. This will give a good starting point for development of the data items derived from the meter specifications.

There will then need to be a review of the data items following the output from the meter specification consultation and the interoperability requirements.

Review Cycle:

- 2 workshops to review, develop and agree a version using meter functional specifications
- Updates by the Project Team
- 1 more workshop to review in light of interoperability requirements and consultation responses
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone – December 2006 Steering Group Meeting

3.3 Interoperability Workstream

3.3.1 Interoperability Definition and Scope

This document will provide clarity on the definition and scope of interoperability that will be used by the project. The project will deliver a number of products relating to individual elements of Suppliers' requirements of interoperability. This document will outline what those elements are in an infrastructure diagram and therefore what the products will be.

The SRSM project is producing its' own definition of interoperability to assist with alignment with any other industry initiatives in this area.

This document will define the objective of interoperability and that will then act as a firm reference point through the development of interoperability requirements.

This document will define the requirements products to follow and as a consequence will not drop into the detail of the requirements themselves. It may use examples to set context and identify principles for consideration at the next step.

The format and content of the document will be as already developed up to v0.2.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - October 2006 Steering Group Meeting

3.3.2 Metering System Interoperability Requirements

Definition: An electricity or gas or dual fuel “metering system”, containing smart functions as defined in the SRSM smart meter functional specifications, enabling remote electronic two way communication with the meter.

The functions and features described within the SRSM smart meter functional specifications relate to a “metering system”, and this could comprise a single device or meter, or a combination of devices used to deliver the functionality.

Detail: A number of meter configurations are possible, but the key requirement is that any incoming supplier or its’ agents is able to execute resilient 2-way communication with the meter.

The interoperability requirements of the “metering system” will be subject to the development of the functional specifications of a smart meter and therefore will not begin until the first baselined v1.0 of the functional specifications is released. This will include an assessment of the interoperability requirements categorised as optional or potential functions, as well as mandatory.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - December 2006 Steering Group Meeting

3.3.3 Architecture Interoperability Requirements

Definition: An architecture sets the highest level principles for an interoperable framework and its constituent elements.

Detail: There are lots of manufacturers each with their own architectures and there are “architecture of architectures” (e.g. TAHI) that are looking to bring together a number of different architectures.

To define the SRSM architecture requirements, we must first define all other interoperability requirements and then assess our architecture requirements. A key principle is that we should not bend SRSM requirements to fit an architecture – any adopted architecture (e.g. European conventions) needs to be flexible enough to incorporate our requirements.

The physical layer of communications is independent of open architecture, but communications speed may restrict which open architecture could be adopted.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone – January 2006 Steering Group Meeting

3.3.4 Data Interface Format and Address Definition

Definition: This will define the message format and addressing conventions for smart metering.

Detail: The data interfaces will be defined as part of the data definition for the SRSM project, together with a high level definition of data items, which will refer to existing industry definitions where relevant. Data interfaces may include data calls, commands and alarms and checks.

Alongside a key dependency on the meter functional specifications, the data interface requirements will also address key technical questions such as the use of formalised/standardised messages, or a specific UK smart metering data schema.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - December 2006 Steering Group Meeting

3.3.5 Communications Interoperability Requirements

Definition: The mechanism(s) for transferring local and remote communications to and from the “metering system”.

Detail: There are many existing methods for communications between the “metering system” and the Supplier, Nominated Agent or Customer Party and local devices (e.g. radio, PLC), and the requirements for this will be defined in a further specification document. This will consider standardisation and/or flexibility to support multiple communications mechanisms. Again, the key requirement is that any incoming supplier, or its’ agents or customer party is able to execute resilient 2-way communication with the meter.

Review Cycle:

- 2 workshops to review, develop and agree first baselined version
- Updates by the Project Team
- Review in light of other requirements/specifications
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - December 2006 Steering Group Meeting

3.3.6 Protocol Interoperability Requirements

Definition: Protocols are the language(s) for communication to/from the “metering system”.

Detail: The requirements will be defined in more detail, but early views are that wherever possible, existing protocols should be used. There is the option to define a specific protocol for smart metering, but this is not thought necessary and may be restrictive on meter manufacturers. There may be a single standard defined in the requirements, a set of standard protocols may be defined for local or remote communication, or higher level requirements for suitable protocols to meet.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review in light of other requirements/specifications
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - December 2006 Steering Group Meeting

3.3.7 Software Interoperability Requirements

Definition: Software is used to access and operate the metering system's functions using the protocol.

Detail: Software enables suppliers to tailor particular aspects of the meter for their own use by configuration through parameters or specific messages. This may include security settings or meter read frequencies.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review in light of other requirements/specifications
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - December 2006 Steering Group Meeting

3.4 Industry Impact Assessment

3.4.1 Impact Assessment of Current Governance

This will deliver a high level impact assessment of the requirements, as defined in the smart meter functional specifications.

This will include a high level impact assessment of all existing gas and electricity industry governance and identify any potential gaps where new governance or more fundamental change may be required.

It will include an indication of the scale of potential impact (e.g. High/Medium/Low) and will show the impact on schedules or subsidiary documents, but will not be a detailed step by step, paragraph by paragraph assessment.

This product will not show how industry agreements may be changed, just where they are affected.

Review Cycle:

- 2 workshops to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group

- Update

Approval – SRSM Steering Group

Approval Milestone - December 2006 Steering Group Meeting

3.4.2 Draft Analysis of Industry Infrastructure

The industry structures and principles for metering will be analysed at a very high level to see if there are any options for considering more strategic change to be targeted in the medium to long term (e.g. restructuring Supplier agents).

This will only describe draft analysis and options for further consideration, therefore has only 1 workshop dedicated to it.

Review Cycle:

- 1 workshops to review, develop and agree high level options
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - January 2006 Steering Group Meeting

3.5 Communications and Stakeholder Management Workstream

3.5.1 Summary

Communication of the Supplier requirements for smart metering and the effective management of its stakeholders will be a key aspect of ensuring its success. It is particularly important to ensure that government (e.g. Ofgem) is aware and happy with the definition and progress of the Supplier requirements for smart metering, as well as ensuring that the project is aware of other initiatives that may impact the delivery of the Supplier requirements for smart metering. Communications and stakeholder management activities will be carried out by the Project. There will be agreed strategies to define the activities to be carried out by each party and then they will be executed and monitored. Future activities and products will be subject to change following the agreement of the strategies.

3.5.2 Communications and Stakeholder Management Deliverables

3.5.3 Stakeholder Engagement & Communications Strategy

Initial stakeholder engagement will be agreed as a pre-requisite, but different approaches will be required for different stakeholders through the lifetime of the project and these should be assessed in detail at the beginning of the project. The Stakeholder Engagement & Communications Strategy will describe the activities to be carried out throughout the SRSM project. It will define who is responsible for each task and how they should be executed – it is expected that Communications resource at the ERA will be available for

this project. The target audience will be defined together with the type of activities required.

- Presentation to September SRSM Steering Group
- Peer Review & update with Project Team
- Issue and review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - October 2006 Steering Group Meeting

3.5.4 Briefing for Stakeholders

A briefing will be drafted for stakeholders for the SRSM project. This material will be developed following the final baseline of products to give certainty on the content.

This will include a set of Frequently Asked Questions.

Review Cycle:

- 1 workshop to review, develop and agree the final baselined version
- Updates by the Project Team
- Review with SRSM Steering Group
- Update

Approval – SRSM Steering Group

Approval Milestone - January 2006 Steering Group Meeting

3.5.5 Stakeholders Engaged

This is the final product to cover the completion of all communications activities, as defined in the Stakeholder Engagement Strategy.

Review Cycle:

- Project Manager review that all stakeholder activity complete
- Review by SRSM Steering Group

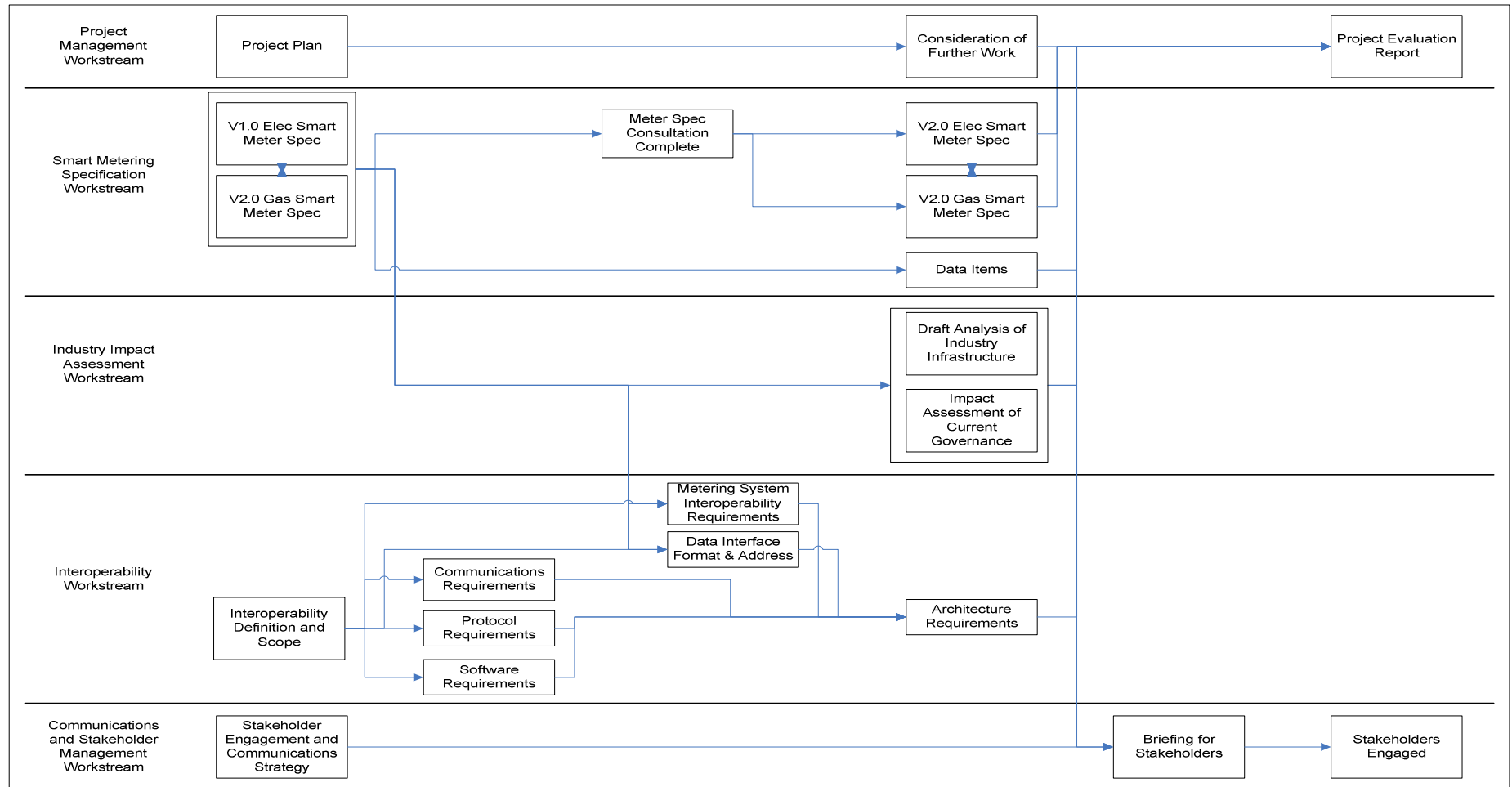
Approval – SRSM Steering Group

Approval Milestone - January 2006 Steering Group Meeting

4 PROJECT RESOURCE

Project Resource has not yet been re-assessed against the activities defined.

5 PRODUCT WORKFLOW DIAGRAM



6 GANTT CHART

The Gantt Chart is appended in a separate Microsoft Project file.