

TAM Audit Scope – Complex Site Desktop Audits

Performance Assurance Board

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Owner/author	Simon Waltho & Christopher Day	Purpose of paper	Decision
Classification	Public	Document version	V1.0
Summary	The Performance Assurance Board (PAB) are invited to comment and agree to de-scope, or to continue plans to undertake Technical Assurance of Metering (TAM) Desktop Audits on Supplier Volume Allocation (SVA) Complex Sites		

1. Background

- 1.1 At its February 2021 meeting ([PAB241](#)) the PAB approved recommendations for the inclusion of a SVA Specific Sample to investigate Complex Sitesⁱ in the 2021/22 Technical Assurance of Metering (TAM) Audit Scope.
- 1.2 Due to the ongoing impacts of COVID-19, it was agreed that these would be completed as Desktop Audits and scheduled for the second half of the Performance Assurance Operating Period (PAOP).

2. Changes Since Scope Approval

- 2.1 Since the approval of the TAM Audit Scope, there have been a number of notable developments in the regulatory governance and obligations of Complex Sites. In particular:
 - The transfer of [BSCP514 - SVA Meter Operations for Metering Systems Registered in SMRS](#), which includes the Complex Site governance and regulation for Meter Operator Agents (MOAs), to the Retail Energy Code (REC) on 1 September 2021; and
 - The Issue 72ⁱⁱ recommendations to introduce Complex Site Classes and a range of Complex Site process improvements as a joint BSC/REC change, in particular the creation of a new standardised Complex Site Supplementary Information Form that will render the use of the current Complex Site form redundant.
- 2.2 As a result of these changes
 - Elexon no longer has the viries to assure and action issues with the end-to-end process as MOA governance now sits under the REC whilst Half Hourly Data Collector (HHDC) governance remains under the BSC; and
 - Any issues identified through the audits may no longer be relevant to the post-Issue 72 operational model.
- 2.3 Consequently, Elexon wishes to determine the PAB's appetite for re-scheduling the Specific Sample for Complex Sites for a future audit year when the dual assurance model between the BSC and REC is more established, and the changes recommended through Issue 72 have been implemented.

3. Alternative Assurance Activities

- 3.1 Should the PAB determine that SVA Complex Site Desktop Audits are de-scoped, and given the greater focus on the Central Volume Allocation (CVA) market in the current audit year, Elexon proposes re-allocating the Technical Assurance Agent (TAA)'s resource into investigations of CVA Metering Systems.

4. Recommendations

4.1 The PAB are invited to:

- a) **COMMENT** on the proposed de-scoping of SVA Complex Site Desktop Audits from the 2021/22 TAM Audit;
- b) **DETERMINE** whether SVA Complex Site Desktop Audits should be de-scoped; and
- c) **AGREE**, if they are to be de-scoped, that the TAA's resources are re-allocated to checks in the CVA market.

For more information, please contact:

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ⁱ [BSCP502 - Half Hourly Data Collection for SVA Metering Systems Registered in SMRS,section 4.9](#): A 'Complex Site' means; any site that requires a 'Complex Site Supplementary Information Form' to enable the HHDC to interpret the standing and dynamic Metered Data relating to SVA Meter Systems for Settlement purposes to be provided to the HHDC in addition to the [D0268 Half Hourly Meter Technical Details](#).

ⁱⁱ [Issue 72- Ensuring measurement transformer assets installed by a Non-BSC Party are successfully Commissioned within BSC timescales.](#)