FlexForum workplan for 2024 and beyond

- the Workplan sets out a process for FlexForum to update, add to and tick off steps in the Flexibility Plan 1.0
  - tasks must align with the FlexForum objective and purpose and help to deliver Flexibility Plan 1.0
  - FlexForum is agnostic about who delivers each step, but it does want to know the work is happening, that the right people are involved and the resulting insights are publicly available, discussed and someone is responsible for taking any next steps
- the proposed Workplan tasks were identified through the workstream kick-off sessions and subsequent workstream review process. This document summarises the task on-a-page descriptions showing the title and indicative output, ie, the thing(s) which will be produced.
  - the tasks are specific projects to address a step in the Flexibility Plan and BAU activities required to meet the FlexForum objective and purpose
- there are 23 tasks:
  - 18 workstream tasks have been 'scoped' enough to understand the purpose and expected outputs and the link to the FlexForum objective and Flexibility Plan (4 digitalisation tasks, 4 flexible resource integration tasks, 4 market frameworks tasks, and 5 consumer participation tasks)
  - 2 foundational tasks needed to set the scene for all other workstream tasks
  - 4 BAU tasks which are common to all streams and none and necessary to meet the FlexForum purpose
- the workplan is a multi-year effort as it is unlikely FlexForum will be able to deliver all 23 tasks in 2024. Tasks have been grouped here as: **first to do**, **must do** and **subsequent tasks**
  - the first to do tasks are listed in the top 2 rows of the table
  - the must do tasks are listed in the following rows of the table
  - the subsequent tasks are listed in the greyed rows of the table. Subsequent tasks will be initiated when resources are available.

Digitalisation	Flexible resource integration and visibility	Market frameworks	Consumer information and participation
Set the scene for digitalising the electricity ecosystem ● A map of existing data flows across the electricity ecosystem, along with the relationships and reasons for the data flow, to to provide reference point for what we are talking about, where the pain points are, and issues to be addressed ● A set of use cases enabled by digitalisation to provide a reference point to identify what needs to change to maximise the value of distributed flexibility ● Advice on principles and environmental factors to guide	**Lessons from the system and market integration pathway for distributed flexibility elsewhere in the world** ● Insights from a sample of jurisdictions about the circumstances and environment which influenced the nature, timing, and pace of action to integrate distributed flexibility; policy and regulatory responses etc adopted due to the circumstances/environment; and things that worked and didn't work. ● Advice on the lessons and insights for Aotearoa New Zealand. ● One or more webinars/workshops	**A stocktake of the existing flexible resources, their opportunities and beneficiaries** ● A survey of distributed flexibility types and capabilities ● A list of the services that each type of distributed flexibility can provide to benefit the electricity system within current market settings and potentially ● Advice on existing opportunities for distributed flexibility given current market settings and the missed opportunities	**The many ways a household, business or community can benefit from distributed flexibility** ● A list of typical distributed flexibility use cases for a household, business and communities (ie, investment scenarios) and the benefits of these use cases ● Advice on a 'users' perspective of the reasons and benefits of distributed flexibility ● One or more webinars/workshops involving parties across the electricity ecosystem and people etc to get input/discuss the outputs

Digitalisation	Flexible resource integration and visibility	Market frameworks	Consumer information and participation
decisions about the pace and extent of digitalisation ● One or more webinars/workshops involving parties across the electricity ecosystem etc to get input/discuss the outputs	involving parties across the electricity ecosystem etc to get input/discuss the outputs		
			Involving households, businesses and communities in the path to distributed flexibility ● A list of Flexibility Plan steps which require explicit consideration of the needs and desires of households, business and communities and a recommended work plan to do this. ● A set of work practices that can underpin FlexForum activities (plus regulators etc) in such a way that they involve consumers in the process.

Digitalisation	Flexible resource integration and visibility	Market frameworks	Consumer information and participation
Explore the functionality and attributes for demand flexible devices and the role of standards ● Advice on the functionality and attributes required for devices to be flexible and to integrate them into the power system and market, eg, communication protocols (a functionality) and cybersecurity (an attribute) ● Advice on the type and role of technical standards relating to distributed flexibility ● One or more webinars/workshops involving device manufacturers, device suppliers, distributors, flexibility suppliers etc			**Exploring how to get consumers usable information about distributed flexibility at the point of decision** ● Advice about an indicative current state of awareness of sellers/advisers about flexibility opportunities of devices, eg, EVs, PV, heating etc, including a map of points of purchase ● Advice on priorities for ensuring consumers have access to usable information about flexibility opportunities at the point of purchase ● Advice about an education pathway for increasing and improving the information available to consumers at the point of purchase.

A plausible future state for distributed flexibility

● document a plausible future state for distributed flexibility in 2030 and 2040 relying on existing work/scenarios to provide a reference point of who/what/how distributed flexibility will play a role in daily lives and the power system

Progress with delivering the Flexibility Plan

● develop and maintain a process to monitor and regularly report on progress with delivering steps in the Flexibility Plan, including what highlighting work is occurring on a step, thinking about whether all interested parties are involved (or informed etc), to join dots across projects and activities.

Update the flexibility plan

● develop and maintain a process to update the Flexibility Plan. Updates are likely to emerge organically through progress reporting and workstream activities, but will need to be collated, triaged and assessed in a structured way.

Respond to regulatory and policy proposals

● responding to regulatory and policy proposals is a key channel for FlexForum perspectives to be shared.

Digitalisation	Flexible resource integration and visibility	Market frameworks	Consumer information and participation
Drawing lessons from learning-by-doing ● bulletins summarising the key learnings from trials as they are undertaken. ● bulletins would feed into a loving update on FF's website			
Fit-for-purpose data exchange processes ● One or more webinars/workshops involving parties across the electricity ecosystem with an interest in fit-for-purpose data exchange processes ● Advice on the characteristics and high-level requirements of a fit-for-purpose data exchange process	**Snapshot of network voltage performance and the impacts** ● A national map of voltage performance using DER data ● Advice on the implications of existing voltage management practices, including the effects of 4777 on the ability for households, businesses and communities to maximise the value of their energy resources and distributed flexibility ● Advice on the scope and focus of reviews of Parts 8 and 6 of the Code ● One or more webinars/workshops involving parties across the electricity ecosystem	**Incentives, assumptions and barriers to distributed flexibility** ● A list of the incentives for a household, business or community to use and offer distributed flexibility created by pricing signals and other market elements across the supply chain ● A survey of the assumed response and outcome of each incentive ● A list of the barriers to responding to each incentive across the ecosystem, ie, distributed flexibility owners, consumers, meter owners, gentailers, retailers, grid owner, system operator, independent generator ● Advice about the opportunities and barriers to a household, business or community maximising the value of their distributed flexibility (ie, value stacking).	**Information inputs to enable informed distributed flexibility feasibility studies and decision making** ● A list of the information needed by households, business and communities to make decisions about distributed flexibility, and why it is needed given the typical distributed flexibility use cases (ie, investment scenarios) ● A checklist of the information inputs for each typical existing and prospective distributed flexibility investment scenario, and advice on minimum requirements for obtaining information inputs, eg, timeliness, method, format etc ● Advice about the ease of access to this information, identifying situations and reasons it is not easily accessible ● One or more webinars/workshops involving parties across the electricity ecosystem
Communication and contractual architecture options for distributed flexibility ● One or more webinars/workshops involving parties across the electricity ecosystem ● Advice on the implications of control architecture options for distributed flexibility	**Input to the EEA project to develop a common connection guideline** ● Advice on challenges experienced with connection processes (by all parties involved) ● Advice on the scope and approach for the project ● One or more webinars/workshops involving parties across the electricity ecosystem etc to get input/discuss the outputs	**Identify options for including flexible resources in the Registry** ● Advice on the information and data about distributed flexibility which should be included in a database (eg, the registry) to enable market activities	**Unlocking product and service innovation** ● Advice on barriers to the development of new product and services could be developed to provide benefits to consumers (directly or indirectly)

Digitalisation	Flexible resource integration and visibility	Market frameworks	Consumer information and participation
	Identify the minimum level of network visibility required to unlock distributed flexibility ● Advice on the specific visibility information required and why, eg, voltage data to actively manage voltage performance and provide that information to DER owners, including the minimum frequency/granularity/number of data points needed and why, the type of capability required and indicative timeframe for obtaining that capability ● One or more webinars/workshops involving parties across the electricity ecosystem	**Develop a manual and advice about what needs to happen for EV chargers to be offered into dispatch notification** ● A checklist of the steps. ● Some example case studies ● Advice for improvement.	**Flexibility options available to a household with electric hot water** ● A case study setting out the options and value streams, and advice on the information a household should seek when making choices about flexibility-ready electric hot water, the channels to share this information and barriers/constraints/missed opportunities ● One or more webinars/workshops involving device manufacturers, device suppliers, distributors, flexibility suppliers etc