| **NORTH AMERICAN ENERGY STANDARDS BOARD**  **2023 ANNUAL PLAN for the RETAIL MARKETS QUADRANT**  **Adopted by the Board of Directors on September 7, 2023** | | | | |
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|  | **Item Description** | | **Completion[[1]](#endnote-1)** | **Assignment[[2]](#endnote-2)** |
| **1.** | **Electronic Delivery Mechanisms** | | | |
|  |  | Review the data used in the NAESB RMQ Internet Electronic Transport specification for data fields that may no longer be utilized and determine if these data fields can be removed  Status: Complete | 1st Q, 2023 | Joint RMQ IR/TEIS and WGQ EDM Subcommittee |
| **2.** | **Energy Services Provider Interface (ESPI) Model Business Practices** | | | |
|  |  | Review the cybersecurity aspects of the REQ.21 ESPI Model Business Practices and make any necessary changes, as required  Status: Started | 3rd Q, 2023 | ESPI Task Force |
| **3.** | **Multi-Factor Authentication** | | | |
|  |  | Review cybersecurity standards to determine if baseline Multi-Factor Authentication (MFA) should be integrated into standard requirements and develop supportive standards as needed  Status: Complete | 1st Q, 2023 | RMQ IR/TEIS |
| **4.** | **Distributed Energy Resources** | | | |
|  | a. | Review cybersecurity protections, such as Public Key Infrastructure (PKI), that may be necessary to secure electronic communications for distributed energy resources (DERs), and develop business practices as needed.  Status: Not Started | 2023 | RMQ BPS |
|  | b. | Develop model business practices to define a common list of grid services for electric market interactions that support grid-edge resources such as distributed energy resources and batteries in support of U.S. Department of Energy Grid Modernization Laboratory Consortium efforts ([Standards Request R22001](https://naesb.org/pdf4/r22001.doc))  Status: Started | 2023 | RMQ BPS |
| **5.** | **Program of Standards Maintenance & Fully Staffed Standards Work**[[3]](#endnote-3) | | | |
|  | a. | Business Practice Requests | Ongoing | Assigned by the EC |
|  | b. | Information Requirements and Technical Mapping of Business Practices | Ongoing | Assigned by the EC |
|  | c. | Interpretations for Clarifying Language Ambiguities | Ongoing | Assigned by the EC |
|  | d. | Maintenance of Code Values and Other Technical Matters | Ongoing | Assigned by the EC |
|  | e. | Development and Maintenance of Definitions | Ongoing | Assigned by the EC |
|  | f. | Harmonization of Definitions with All Other Quadrants | Ongoing | Assigned by the EC |
|  | g. | Development and Maintenance of Model Business Practices | Ongoing | Assigned by the EC |
| **Provisional Activities** | | | | |
|  | 1. | Develop NAESB Certification checklist criteria for Retail Quadrants to be used in the NAESB Certification Program. The certification checklist may address test scripts, a checklist of items to be tested, data connectivity for test scripts and EDM testing. | | |
|  | 2. | Consider development of business practices to support the use of software applications for customer authorizations, including mobile devices. | | |
|  | 3. | Consider the need for development of Model Business Practices to support the implementation of distributed generation. | | |
|  | 4. | Consider the need for development of Energy Efficiency Model Business Practices to support the request of the American National Standards Institute. | | |
|  | 5. | Support the activities of the Retail Structure Review Committee related to standards development. | | |
|  | 6. | Develop business practice standards, as needed, to support purchase and sale transactions related to hydrogen | | |
| **Retail Electric Model Business Practices Only:** | | | | |
|  | 1. | Settlement Process: Reconcile energy schedules and energy delivered by Suppliers within a given market. Note: will need to be coordinated with the WEQ for the RMQ. | | |
|  | 2. | Review and develop model business practices to support renewable portfolio programs. | | |
|  | 3. | Develop and/or modify the NAESB Model Business Practices to address any requests regarding community solar or aggregated net metering. | | |

**Retail Markets**

**Quadrant Executive Committee**

**(RMQ EC)**

**Business Practices Subcommittee (BPS)**

**Contracts Subcommittee (dormant)**

**Glossary Subcommittee**

**Retail Registration Agent Task Force (\*)**

**Technical Electronic**

**Implementation Subcommittee (TEIS)**

**Model Business**

**Practice**

**Development**

**Task Forces & Working Groups**

**Technical**

**Standards**

**Development**

**Joint RMQ/WEQ DSM-EE Subcommittee**

**Information Requirements Subcommittee (IR)**

**Open Field Message Bus (FMB) Task Force**

**Energy Services Provider Interface (ESPI) Task Force**

NAESB 2023 Retail EC and Subcommittee Leadership:

Executive Committee: Debbie McKeever, Chair

Business Practices Subcommittee: Sam Watson

Information Requirements Subcommittee/Technical Electronic Implementation Subcommittee: Sam Watson

Glossary Subcommittee: Debbie McKeever

DSM-EE Subcommittee: Debbie McKeever

Retail Registration Agent Task Force: Debbie McKeever

Open FMB Task Force: Vacant

Energy Services Provider Interface (ESPI) Task Force: Donald Coffin

(\*) The Retail Registration Agent Task Force may draft MBPs, process flows, implementation guides and technical standards supportive of the Registration Agent and submit them to the BPS. The group is chaired by Debbie McKeever.

1. Dates in the completion column are by end of the quarter for completion by the assigned committee and subcommittee. The dates do not necessarily mean that the standards are fully staffed to be implementable by the industry, and/or ratified by membership. If one item is completed earlier than planned, another item can begin earlier and possibly complete earlier than planned. There are no begin dates on the plan. [↑](#endnote-ref-1)
2. The assignments are abbreviated. The abbreviations and committee structure can be found at the end of the Annual Plan document. [↑](#endnote-ref-2)
3. This work is considered routine maintenance and thus the items are not separately numbered. The RMQ EC will assign maintenance efforts on a request-by-request basis. [↑](#endnote-ref-3)