

## Meeting note

13:00 – 14:30, Monday 10 July 2023  
via Microsoft Teams

### BR-MeX workshop – meeting note

This note provides a summary of the key points raised by wholesalers, retailers and other stakeholders (with names excised) during the 10th July 2023 BR-MeX working group.

The accompanying slides on our website provide further details regarding the presentation by IFF.

#### Participants

Organisation	Participant
Ofwat	Sean Mills
MOSL	Samantha Webb
IFF Research	Jessica Huntley-Hewitt
	Ellie Hodgson
	Marc Cranney
	Eric Reynolds
Wholesalers	
PRT	Sam Dawson
SES	Julie-Ann Anderson
TMS	Gerard Lyden
UUW	Paul Stelfox
Retailers	
UKWRC (Business Stream)	Trevor Nelson
UKWRC (Wave)	Wendy Monk
Other stakeholders	
CCW	Adam Boynes

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### Overview of BR-MeX working group discussion

Ofwat introduced its research partners (IFF Research) to the group and noted that IFF will be taking forwards the work to develop the B-MeX and R-MeX surveys that will serve as the underlying metrics for the BR-MeX performance commitment.

IFF provided a presentation setting out its approach to developing the surveys, noting that they would utilise a staged approach starting with a scoping and development phase. The slide pack used in the session are available alongside the link to this meeting note [here](#).

IFF noted that in order to conduct the B-MeX pilot they would require sample from wholesalers on their direct operational contacts. This would need to be delivered in two batches, the first to give an indication of the sample population and the second to use for pilot fieldwork. Further details are available in the published slide pack.

Following the presentation, the group discussed the findings from Ofwat's 21st June questionnaire sent to all wholesalers as well as the topics set out on slide 15 in the published slide pack

### Summary of group discussion

Wholesaler retention of direct customer contact details:

- One wholesaler noted that their current approach was to only hold non-household contacts for a maximum of 30 days. The wholesaler felt that this was consistent with its obligation under section 15 and 16 of the The Market Arrangements Code (MAC) which notes that data should only be retained for 30 days unless it is specifically needed.
- One retailer confirmed that if the customer has had a direct contact with the wholesaler, as opposed to an indirect contact via the Retailer, then the code should not act as a blocker to the retention of customer contact details.

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- The working group asked Ofwat to take an action to clarify this internally and return to the group with a view on this.

Provision of direct operational contact details:

- IFF asked wholesalers whether they were able to provide SPID information for each direct operational contact they had received. They noted that this data would be helpful to enable matching with data from the Central Market Operating System (CMOS) to give information on the customer's consumption and size. This would provide valuable information when considering the sample for the pilot.
- Wholesalers noted that the ability of wholesalers to provide this information is likely to be mixed. It was noted that this would increase the turnaround time for the data considerably given the data will have to be pulled from CMOS and matched with other systems.
- IFF noted that the SPID would be more helpful in the second batch of data which would be used to conduct the pilot fieldwork. It was noted that this option will be explored further as part of the pilot work.

Discussion on the types of contacts that should be applicable for the B-MeX survey:

- One retailer asked whether the B-MeX survey will be based on an individual contact or at the completion of the interaction. It was noted that the findings would be different depending on when the customer was surveyed.
- One retailer noted that in relation to the indirect contacts the survey should be based on the final outcome, as opposed to an individual contact.
- One wholesaler was of a view that the B-MeX survey should align with the C-MeX and D-MeX surveys on this point as far as possible given they have precedent and are understood by the industry.
- Another wholesaler noted that mirroring C-MeX felt appropriate for the direct contact portion of B-MeX. The wholesaler also noted that they agreed that it would be good for the indirect contact portion to be surveyed at the point of completion of the job by the retailer. It was however noted that knowing when a job is complete could be

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challenging; in addition the time between wholesaler interaction and the retailer closing the job could take some time.

- Another wholesaler noted that the categorisation of contacts needs consideration as part of the pilot work.
- The group noted that there were likely to be some direct wholesaler operational contacts that were not suitable for B-MeX. This includes instances around disconnections for non-payment and some metering categories.
- IFF noted that for the initial data collection it would like to collect all direct contacts from wholesalers. This would provide an opportunity to see everything that is available and then to form views on which contacts might be eligible. It was noted that this will be discussed further with the group following the collection of data from wholesalers.

Other topics of discussion:

- The group asked whether the August 2023 R-MeX survey would still be issued or whether it was on hold pending the pilot. Ofwat and MOSL confirmed that they are discussing this and intend to provide confirmation to the industry in due course.
- One wholesaler noted that it seems appropriate to consider a check and challenge process for B-MeX similar to the approach undertaken in C-MeX and D-MeX.
- One retailer noted that there's a possibility that non-household customers contacted as part of the survey may get in touch with their retailer if they are unsure of the origin of the survey. The retailer noted that it may be useful for Ofwat to proactively inform all retailers that this work is underway so they can be prepared to answer queries. Ofwat agreed that this was a useful approach.
- One member of the group asked to confirm what the BR-MeX working group is expected to contribute to the pilot. Ofwat confirmed that the working group's purpose is to advise the development of the B-MeX and R-MeX survey design and pilot. The working group will work with Ofwat, MOSL and IFF to facilitate working-level, detailed discussions about issues, ideas or risks in relation to the implementation of BR-MeX pilot and remaining undecided aspects of the methodology design.

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Next steps:

- Ofwat and IFF noted that they intend to send out a Request for Information (RFI) to all wholesalers regarding direct operational contacts. This will allow IFF to gain an understanding of the sample population and further develop and scope the fieldwork.
- The group agreed that it would meet again in two weeks, with the session likely to focus on the R-MeX key design questions.