

Data Integration Platform (DIP) Manager System Release Strategy

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Synopsis

The DIP Manager Release System Strategy sets out the:

- Purpose;
- Principles;
- Types of System Releases;
- System Release Schedule;
- Governance;
- Testing; and
- Communication of System Changes.

This establishes a clear, predictable, and transparent approach to system changes, which are commonly known as releases. For industry or market participants, they will be able to plan for, support, and test (where applicable) for DIP system changes.

1. Purpose of DIP Manager System Release Strategy

- 1.1. The DIP is a middleware service that supports electricity market participants in sending and receiving messages. Importantly, it is a software that is continually improved. To ensure that electricity market participants are informed of system changes, the **DIP Manager System Release Strategy** outlines the process for planning, testing, and approving system changes to the DIP.
- 1.2. When there are ad-hoc requests for system changes, such as a system change driven by the **Issue Resolution Group** (IRG)¹, the system release will be tailored to the urgency and feasibility of the request.

2. System Release Principles

- 2.1. System Releases principally (but not limited to) fall into four categories of changes:
 - DIP-system only changes;
 - Tier 2 DIP Change Request (CR);
 - Tier 1 DIP CR; or

¹ IRG was introduced by [P492 Introduce a time limited expedited change process to support the delivery of the electricity Settlement Reform Significant Code Review \(SCR\)](#) and allows Ofgem to change Code Subsidiary Documents (CSDs) and DIP Subsidiary Documents (DSDs) where recommended by the IRG and subject to consultation.

- DIP Message definition changes.
- 2.2. **DIP-system only changes**, as set out in [DSD004 - DIP Change and Document Management](#) (hereafter **DSD004**), **2.15. DIP system only changes** occur when the DIP Service Provider identifies changes required for the DIP software/firmware/hardware that aren't DIP User-impacting. These are determined/approved by the DIP Manager.
- 2.3. **Tier 2 DIP CRs** for system changes occur when there are changes made to the DIP system that impact DIP Users but do not meet the criteria in **DSD004, 2.1 Types of Change** to be considered a **Tier 1 CR**. These system changes generally support enhancements to the system or user experience. These are determined/approved by the DIP Manager or **the Authority**².
- 2.4. **Tier 1 DIP CRs** for system changes occur when one or more of the criteria in **DSD004, 2.1 Types of Change** for a Tier 1 change are met. These are material changes determined/approved by the **DIP Change and Advisory Board** (DCAB) or the Authority (Ofgem). The assessment criteria used, set out in **DSD004, 2.1.5**, are:
- An implementation cost greater than £500,000 for the DIP Manager and/or £250,000 for DIP Users;
 - Placing new obligations on DIP Users and/or the DIP Manager that will require a change to the DIP User's business operating model; or
 - An Implementation Date will be more than 24 months after the date on which the decision is made.
- 2.5. **DIP Message definition changes** for system changes occur when there is a change to a message³ definition or structure; Industry Codes/Agreements, such as the Balancing and Settlement Code (BSC), Retail Energy Code (REC), Distribution Connection and Use of System Agreement (DCUSA), owned messages, and the process to change them. These are material changes analogous to Tier 1 DIP CRs, as they will likely require adjustments to a DIP User's business operating model and may incur high costs. However, DIP Message definition changes are governed by the message owners' change process⁴ and, according to the DIP Rules⁵, are not considered a DIP CR for a determination by the DIP Manager, the DCAB, or the Authority. The DIP Manager supports the development and implementation of DIP Message definition changes as far as practicable.

3. Types of System Releases

- 3.1. There are four types of DIP system releases, which are: Standard, Non-Standard, Monthly, and Emergency. **Standard**, which occurs tri-annually, and **Non-Standard**, which can occur anytime, System Releases are used for:
- Tier 1 DIP CRs; or
 - DIP Message definition changes.
- 3.2. Tier 1 DIP CRs and DIP Message definition changes are material changes. Using set release times via Standard System Releases ensures DIP Users (and others) can prepare for any changes. In some instance these changes will occur outside a set release time. This will likely be driven by need, use, and urgency. Non-standard release ensures these changes can be implemented as and when practicable.
- 3.3. **Monthly System Releases** occur on the second Thursday of any given month. These are used for:

² [The DIP Supplement, 5.4 Authority Step-In procedure](#) details how and when the Authority can make a determination for a DIP CR. **DSD004, 2.8. Decision to implement** details the Authority retains the right to step-in at any point prior to a DIP Manager or DCAB determination.

³ Means a structured data flow sent using the DIP in accordance with the DIP Rules and comprised of both transactional data and content data.

⁴ <https://www.elexon.co.uk/bsc/change/> ,

⁵ **DSD004, 2.13 DIP Message definition changes** sets out the process for DIP Message Definition Changes. Under **DSD004, 2.13.4** a decision will not be required from the DIP Manager/DCAB, and it should be treated in the same way as DIP System only change

- Tier 2 DIP CRs; or
 - System-only changes.
- 3.4 Tier 2 DIP CRs are not considered material changes and pose a limited risk during implementation. These are improvements and enhancements of the DIP system. It is efficient and cost-effective to implement these changes when they are available to ensure DIP Users will realise their benefits.
- 3.5 Additionally, only DIP-system changes are required for the DIP system (software/firmware/hardware), which are not DIP User-impacting. Including DIP-system only changes as part of a month release schedule ensures they can be deployed as and when they are ready.
- 3.6 **Emergency System Releases** can occur anytime and are used for (but not limited to):
- DIP-system only changes;
 - Tier 2 DIP CR;
 - Tier 1 DIP CR.
- 3.7 An Emergency Release is driven by need, urgency, and feasibility. This **will likely** cover all changes under the DIP governance (i.e., determination made by the DIP Manager, DCAB, or Authority 'step-in'). These releases will be implemented as and when practicable.

4. System Release Schedule

- 4.1. The System Release Cadence is:
- **Standard System releases**, which can occur on Thursday in the last week of **February, June**, or the first week of **November**.
 - **Non-standard System releases**, which can **occur anytime**. These System change implementation dates relate to the specific business requirements and governance process applied to the System change.
 - **Monthly System Releases occur monthly on the second Thursday of the month**. These are DIP-System changes, i.e. DIP-System Only Changes and/or Tier 2 CRs.
 - **Emergency System Releases**, which can **occur at any time**. These System change implementation dates relate to the specific business requirements and governance process applied to the System change.

5. Governance of System Changes

- 5.1. Each system change is evaluated based on the criteria established in the DIP Rules, which determine the progression path for the change, its governance route, and its implementation date.
- 5.2. When changes are raised, the DIP Manager provides a 'critical friend' function to DIP CR proposer(s); the DCAB provides a 'critical friend' function⁶ to the DIP Manager.
- For the DIP System-only changes are developed and **decided upon by the DIP Manager**. These are part of the Monthly System Release schedule.
 - For Tier 2 DIP CRs for system changes are developed, alongside a CR proposer, and **decided upon by the DIP Manager or the Authority**. The DIP Manager will draft an initial assessment, a final assessment, and a decision report. These are part of the Monthly System Release schedule.
 - For Tier 1 DIP CRs for system changes, the DIP Manager will draft an initial assessment, a final assessment, and a decision report. Additionally, these changes **are determined by the DCAB or the Authority**, should

⁶ DSD001 – DIP Governance (hereafter DSD001) outlines in **4 DIP Change and Advisory Board** their role and purpose, including as a critical friend to change requests.

they decide to step in. Generally, Tier 1 DIP CRs will be implemented as part of the tri-annual Standard System Releases schedule.

- For DIP Message definition changes, follow the change process of the Lead Code and Energy Market Data Spec (EMDS) change process owned by the REC Code Manager. The DIP Manager supports the progression of these changes; however, it can. Also, neither the DIP Manager nor the DCAB decides on these changes per DSD004, 2.13.4. Rather, **the Lead Code Body's change process provides an outcome that has considered the impact assessment from the DIP Manager**. These changes are implemented in line with the Lead Code Body and EMDS change(s) implementation dates.

6. Testing of System Changes

6.1. Testing of system changes can be:

- **Internal** – the DIP Service Provider will test the changes to the DIP system. This includes:
 - DIP-system only changes;
 - Tier 2 DIP CR;
 - Tier 1 DIP CR; or
 - DIP Message definition changes.
- **External** – the DIP Service Provider and identified impacted DIP Users (but not limited to), such as an Electricity Supplier, who are invited to participate in testing (there are no requirements and/or obligations to support testing in the DIP Rules), will test the change to the DIP system. This includes:
 - Tier 1 DIP CR; or
 - DIP Message definition changes.

6.2. To determine whether system change is tested internally or externally, the DIP Manager and the DIP Service Provider will assess:

- Functional impact(s);
- Interoperability Impact(s);
- Data impact(s);
- Assurance impact(s);
- On-boarding impact(s); and
- Operational impact(s).

6.3. The assessment of the DIP Manager and the DIP Service Provider will be made public via a **Forward Schedule of System Change** (FSSC) on the DIP Manager's website and discussed at DCAB. This will allow interested parties, such as DCAB, to provide feedback.

6.4. Additionally, the DIP Manager will support any DIP Message definition changes and the testing needs led by the Lead Code Body of the change.

7. Communication of System Changes

7.1. An FSSC will provide visibility of:

- DIP-system only changes;
- Tier 2 DIP Change Request (CR);
- Tier 1 DIP CR; or
- DIP Message definition changes.

7.2. The FSSC will provide details of the release dates for each type of change and the type of release they will be part of. Further, the FSSC will be updated monthly and made publicly available on the DIP Website.

Example of FSSC

| Type Change | Date Raised | Tier (if applicable) | Description of the change | Impact on DIP Users | Cost | Implementation Date and Release |
|-----------------------------|-------------|--|--|---|-------------------------|---|
| System-only and/or Material | XX/XX/XXXX | 1/2/System-only/DIP Message definition changes | High-level overview of what the change will mean for the DIP System/Portal | An assessment of how the change will affect DIP Users | Cost of the change in £ | This change to the DIP system/portal will be part of a: <ul style="list-style-type: none"> • Standard System Release occurring on XX/XX/XXXX |

7.3. In addition to the FSSC, the DIP Manager will produce release notes for each change. The release notes will provide more details on specific system changes. The DIP Manager will use a **Provisional**, **Final**, and **Confirmation** release notes. Each release note serves different purposes.

7.4. Provisional Release notes are specifically focused on DIP-system only changes or Tier 2 DIP CR, as they pertain to enhancements made to the DIP System. These notes help DIP Users and other stakeholders understand the improvements being implemented. Additionally, they provide an opportunity for feedback from DIP Users and others. The DIP Manager can use this feedback, if received, to adjust the tier of the change, if applicable.

- Provisional Release Note(s) detail:
 - Scope
 - Implementation date
 - DIP User impact statement; and
 - Testing required.

7.5. Provisional Release notes are released **10 working days** after the scope is confirmed and added to the FSSC.

7.6. Final Release notes are used for **all types’ system changes**.

7.6.1. For DIP-system only changes or Tier 2 DIP CRs, the final release notes confirm what has been detailed within the provisional release note and explain the testing performed. Additionally, it allows DIP Users and others to understand the determination made on a Tier 2 CR by the DIP Manager or Authority.

7.6.2. For Tier 1 CRs or DIP Message definition changes, the final release note details the requirements that the DIP system has changed to; Tier 1 CRs or DIP Message definition changes do not evolve from the final release note, as these are the requirements agreed upon from a Tier 1 CR or DIP Message definition change. There is no provisional release note for material changes as they are developed via the DIP CR process or Lead Code Body change process. Determinations by DCAB or the Authority on Tier 1 CRs (if approved) cannot change once agreed upon. Outcomes from the Lead Code Body change process cannot be changed once agreed upon for DIP Message definition changes. Final Release Note(s) detail:

- Scope
- Implementation date
- DIP User impact statement; and
- Testing performed.

7.6.3. Final Release notes are released **20 working days** before implementation.

- Confirmation Release Notes are used for both system-only changes and material changes to confirm a release has happened:
 - Scope
 - DIP User impact statement
 - Testing performed; and
 - Implemented date.

7.7. Confirmation Release Notes are released **10 working days** after implementation of a change.

7.8. A Post-Release Confirmation will be issued to confirm what was successfully deployed. This confirmation will include links to updated artefacts and supporting documentation, where applicable.

Post-Release Confirmation is issued within **1 working day** of deployment.

7.9. A Post-Release Report will be produced to summarise:

- Deployment outcomes
- Any issues encountered
- Lessons learned
- Follow-up actions (if applicable)

The Post-Release Report is issued within **10 working days** of deployment via established Service Management and governance channels.