



# SIF Alpha Flex Direct

## Mid Point Review

Centre for Sustainable Energy, LCP Delta, Sia Partners, UK Power Networks & Utilita Energy



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# Project Overview

# What is Flex Direct?

**Flex Direct aims to make energy flexibility markets more accessible by developing and trialling a novel commercial model that will incentivise social landlords to provide peak reduction services**

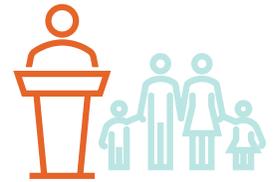
Enabling **'social landlords'**, e.g. local authorities (LAs) or social housing providers (SHPs), to work with Distribution System Operators (DSOs) on flexibility markets, allowing vulnerable customers to benefit from energy flexibility without the risks or complexities of direct involvement.

Focussing on **energy efficiency measures**, which are well-funded by the government for social housing upgrades, enables peak energy demand reduction to be provided for DSOs when focused on areas with network constraints.

By combining energy efficiency with flexibility, we can improve our UK housing stock, align with a strategic **"energy efficiency first" approach**, and create an extra revenue stream for social landlords.

In the future, we will explore the potential to extend the Flex Direct model to other low-carbon technologies, ensuring that as we move toward Net Zero, **all consumers can benefit** from a smarter, greener, and more flexible energy system.

The Flex Direct model will be developed with engagement from key stakeholders, then trialled to evidence that it is an effective model. If successful it will be considered for implementation into business-as-usual (BAU)



# Flex Direct Alpha Planned Outcomes

## Deliverables

- Work Package 1: Project Management
- Work Package 2: Centre for Sustainable Energy (CSE) will lead stakeholder engagement with Social Landlords to understand requirements & eligibility for participation in the commercial arrangement. Understand potential impact on vulnerable consumers.
- Work Package 3: Sia Partners will develop and refine commercial frameworks and Cost Benefit Analysis developed in Discovery.
- Work Package 4: Sia Partners will identify requirements to standardise the framework into BAU and engage with UK Power Network's DSO team to understand data and user requirements including data sharing.
- Work Package 5: LCP Delta will develop modelling and/or monitoring approach for alternative baselining solution, considering the accuracy and reliability with respect to market confidence.

## Benefits

- New commercial framework for organisations to engage with the flexibility market through the DSO.
- Future reductions in the cost of operating the network, and therefore cost savings per annum on energy bills for consumers.
- Improved access to revenues for local authorities and social housing providers, therefore contributing to greater social good for vulnerable consumers.

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# Project Progress

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# WP1: Project Management

- Project kick-off successful
- Weekly team meetings to monitor progress
- Coordinating Work Packages(WPs) with lead partners
- Contract between all parties agreed
- Mid point report & review delivered

Project Element	Outcome
Finances	On track
Project Plan	On track and updated
Risk management	On track and updated
Project specific conditions	On track

# WP2: Stakeholder engagement / Process

## Objectives of the stakeholder engagement in Flex Direct Alpha

- Establish requirements for social landlords and define eligibility criteria to participate in trials
- Understand user journeys and impact on vulnerable customers
- Identify potential site(s) for future trial(s) based on eligibility criteria developed

## Overview of Alpha engagement process



## Objectives of the three workshops

- Workshop 1: Introduce and gauge participants' understanding of Flex Direct and energy efficiency flexibility, present proposed commercial models, collaboratively explore opportunities and barriers of each model and collect insights to help shape Flex Direct proposals
- Workshop 2: Present energy efficiency flexibility for social landlords in more detail, define and discuss baselining approaches to evidencing peak demand reduction, introduce and collaboratively refine detailed participation requirements and collect insights to inform the final phase of the Alpha project
- Workshop 3: Present finalised participation requirements for chosen commercial model, collaboratively refine route map(s) to participation in Flex Direct and inform site selection for potential Beta trial

# WP2: Stakeholder engagement / Shaping proposals

## Insights gathered ('you said...')

**Low level of understanding of energy efficiency flexibility** among social landlords in attendance was reported.

A barrier identified from the outset was related to the landlords' ability **measuring demand and evidencing reduction**.

Landlords expressed the **need to understand the specific details of the three proposed commercial arrangements**, potentially in the form of case studies, so that they could better assess them against each other.

Landlords emphasised the **need for more guidance on the project**, including participation criteria, management of the project, eligible energy efficiency measures, measuring of energy reductions, data sharing and risks.

## Actions taken in response ('we did...')

**Pre-reading materials** with additional information were provided ahead of Workshop 2 and, during the workshop, **energy efficiency flexibility** for social landlords was presented by LCP Delta **in more detail**.

Baselining approaches were designed to include an **option for the landlords to avoid measuring demand** to evidence reduction.

Further **detail on each of the three commercial arrangements** was developed by Sia Partners and presented at Workshop 2.

**Participation requirements were drafted and further co-developed** with participants at Workshop 2, considering them under four lenses: technical, organisational, financial/commercial and social.

# WP2: Stakeholder engagement / Shaping next steps

## Insights gathered ('you said...')

Greater clarity around the **requirements of the contract** (commitments, overall duration, legal repercussions and complaints process associated with non-compliance) and **viability of the payments** (quantified benefits/revenue against resource required) would support the landlords' decision to participate.

Having adequate guidance to share with residents would support **tenants' understanding** of the project and the measures installed.

**Limited take-up of energy advice by tenants** is a common obstacle to ensuring the impact of new energy efficiency measures is maximised and vulnerable households are supported.

The "**direct contracting with social landlords**" models, with and without third party support, were favoured and noted to be quite similar.

The "**no demand measurement**" baselining approach was voted most popular yet benefits of before and after measurements were noted.

The workshops demonstrated there is both **interest and a certain level of preparedness in participating in Flex Direct**, with some social landlords potentially interested in a Beta trial.

Having insulated most of the properties that needed it, some landlords asked to consider whether **previous retrofit projects** could qualify for Flex Direct, or whether the eligible measures could **extend to solar PV**.

## Actions planned in response ('we will do...')

We are working together to **finalise the details of the participation requirements**.

**Guidance for tenants** will be considered in finalising the participation requirements and in developing proposals for a possible Beta trial.

In developing proposals for a possible Beta trial, the team will consider how to **support landlords in maximising tenants' engagement and support**, with a focus on vulnerable consumers of energy.

Sia Partners are considering this feedback in **finalising proposals for the commercial models**.

LCP Delta are considering this feedback, and potentially the addition of a blended option, as they **finalise proposals for baselining approaches**.

As part of **Workshop 3** the project team will explore which organisations would be interested in a Beta trial. CSE will then set up **1:1 interviews** with these to confirm readiness and identify potential suitable sites for the trial.

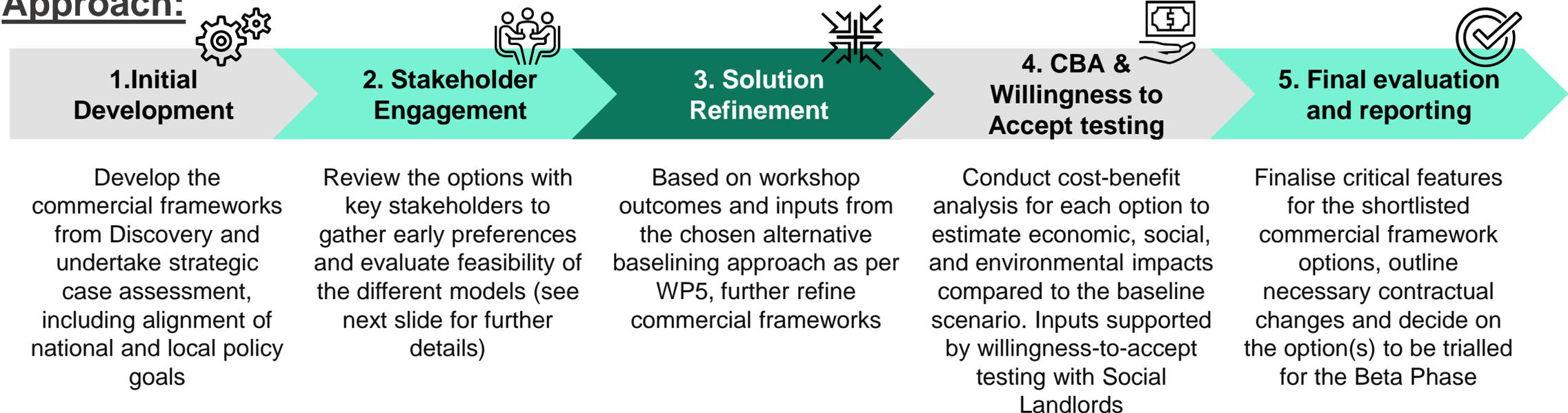
UK Power Networks and the project team are exploring **options for what other retrofit projects** could be included in Flex Direct.

# WP3: Commercial Arrangements and Route to Market / Approach

## Key Objectives of work package

- Develop and refine commercial frameworks developed in Discovery, with expert input from Utilita, and validate frameworks by directly testing willingness-to-accept with Social Landlords, as coordinated by CSE;
- Refine and expand cost benefit analysis (CBA), incorporating baselining methodology as developed in WP5

## Approach:



# WP3: Commercial Arrangements and Route to Market / Engagement

Engagement was conducted through dedicated workshops during which the three commercial models were presented, with a focus on addressing current challenges and market needs. Facilitated discussions and voting mechanisms captured stakeholder preferences, concerns, and recommendations to inform the refinement of the options.

Stakeholder	Engagement Objective	Key Findings:
<b>UK Power Networks: DSO teams</b>	To determine the Flex Direct product parameters including the procurement strategy, utilisation fees, payment mechanisms; and data requirements	Gave clear feedback on the most relevant parameters to consider for a bespoke energy efficiency flexibility product and what could be tested with Social Landlords to drive uptake. The DSO acknowledged the rationale behind all three models and their distinct roles, risks, and responsibilities, adding that Option 2 aligns best with Flex Direct's core objectives.
<b>Social Landlords</b> (as facilitated by CSE)	To gauge current level of awareness and understanding of energy efficiency flexibility amongst Social Landlords, discuss participation requirements and validate commercial appetite for the Flex Direct solution	During initial engagement, many Social Landlords cited their lack of awareness, or capacity to participate in flexibility markets. However, as participation requirements became clearer, especially on baselining, interest has grown for all three options, notable Option 2 for its revenue potential, and Option 3 where Social Landlords can capitalise on their existing relationships with third parties
<b>Flexibility Aggregators + Third Parties</b>	To validate the commercial appetite for the Flex Direct solution from flexibility aggregators and refine commercial frameworks as appropriate	Found Option 3 most relevant but appreciated the value in the other options in facilitating new market entrants, relative to their capability. They viewed the marketplace as innovative but emphasised that accurate baselining will be crucial for estimating flexibility potential and determining final payments. They added that we should consider protective measures and validation methods for the Beta trial.



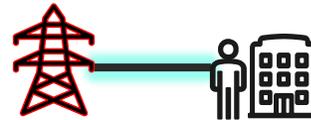
# WP3: Commercial Arrangements and Route to Market / Options

## Option 1: Enhanced Engagement



Aims to boost energy efficiency flexibility uptake by **leveraging existing market players**; flexibility aggregators remain primary providers of flexibility to the DSO, with Social Landlords participating through sub-contractual agreements external to the DSO's contracts.

## Option 2: Direct Contracting with Social Landlords



Introduces a new commercial arrangement allowing **Social Landlords to act independently** as flexibility service providers, delivering energy efficiency flexibility directly to the DSO without relying on intermediaries such as flexibility aggregators.

## Option 3: Direct Contracting with Social Landlords with Third-Party support



Creates a **new marketplace for energy efficiency flexibility**, enabling Social Landlords to act as independent service providers delivering directly to the DSO, with access to third-party technical support if needed.

### Key Components:



- *Introducing an energy efficiency flex product as an offshoot of the existing Long Term Sustained Utilisation product*
- *Increased marketing and engagement*
- *Alternative baselining approach*



- *Mechanism for direct contracting*
- *Upskilling from DSO*
- *Increased Utilisation Fee*
- *Protective Mechanism embedded into contract*
- *Developing a new flexibility product*
- *Increased marketing and engagement*
- *Alternative baselining approach*



- *Matching service for Social Landlords & supply chain partners*
- *Mechanism for direct contracting*
- *Upskilling from DSO*
- *Protective Mechanism embedded into contract*
- *Increased Utilisation fee*
- *Developing a new flexibility product*
- *Increased Marketing and engagement*
- *Alternative baselining approach*

# WP3: Commercial Arrangements and Route to Market / Progress towards final deliverables

Significant progress has been made towards the deliverables. Engagement with key stakeholders and ongoing framework evaluations have helped finalise the three commercial options, produce a draft CBA assessment and determine a preferred option for trial.

Remaining tasks include:

- Willingness-to-Accept Testing: Assessing potential revenue for each model with Social Landlords in the final workshop led by CSE.
- CBA and Financial Case: Completing the CBA, integrating project inputs, and finalising financial assessments.
- Model Selection and Beta Preparation: Confirming the preferred model and preparing for the beta testing phase.



**We propose adjustments to following contractual parameters to develop a Flex Direct solution that addresses key barriers**

The proposed changes are applicable to all three commercial framework options.

**To discuss today:**

1. Application windows
2. Procurement strategy
3. Contract length
4. Utilisation fee
5. Payment mechanism
6. Data requirements
7. Target customer segment
8. Other

Flex Direct Product Parameters

Option 1: Enhanced Engagement	Option 2: Direct Contracting with Social Landlords	Option 3: Direct Contracting with Social Landlords with Third Party Support																																				
<p><b>Summary</b></p> <p>Option 1 involves aggregators to drive energy efficiency by making participants in building markets, and aggregating energy efficiency measures with flexible contracts to offer participants an alternative to traditional energy contracts, and manage building energy efficiency and energy costs.</p> <p>Option 2 involves Social Landlords to directly participate in flexible markets, rather than aggregators, and to manage energy efficiency measures through flexible contracts to offer participants an alternative to traditional energy contracts, and manage building energy efficiency and energy costs.</p> <p>Option 3 involves third party aggregators to manage participants in flexible markets, rather than aggregators, and to manage energy efficiency measures through flexible contracts to offer participants an alternative to traditional energy contracts, and manage building energy efficiency and energy costs.</p>	<p><b>Summary</b></p> <p>Option 2 involves Social Landlords to directly participate in flexible markets, rather than aggregators, and to manage energy efficiency measures through flexible contracts to offer participants an alternative to traditional energy contracts, and manage building energy efficiency and energy costs.</p>	<p><b>Summary</b></p> <p>Option 3 involves third party aggregators to manage participants in flexible markets, rather than aggregators, and to manage energy efficiency measures through flexible contracts to offer participants an alternative to traditional energy contracts, and manage building energy efficiency and energy costs.</p>																																				
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Strategic and Commercial assessment

Category:	Description:	Relative Costs per Option		
		Option 1	Option 2	Option 3
Solution Development Costs	All project partners cost during Beta Trial	Low	Low	High
	Cost of developing one flexibility product	Low	Low	High
	Cost of developing alternative baselining approach and cost testing	Medium	Medium	Medium
	Cost of developing engagement materials	High	High	High
	Cost of drawing up new commercial contracts for Social Landlords	High	High	High
Risk Mitigation Costs (avoiding)	Costs required to support Social Landlords to participate in flexibility markets	Medium	High	Medium
	Costs associated with participant recruitment/underwriting for trials	High	High	High
	Cost of developing a new marketplace platform for energy efficiency	High	High	High
	Cost of developing a new marketplace platform to support the Flex Direct solution	High	High	High
	Engineering and tools required to support the Flex Direct solution	High	High	High
Bill of Materials (avoiding)	Cost of procuring energy efficiency flexibility	Low	Low	Low
	Cost of updating targeted engagement materials	High	High	High
	Costs required to support Social Landlords to participate in flexibility markets	High	High	High
Other	Cost of updating marketplace platform for energy efficiency flexibility	High	High	High
	Cost of updating marketplace platform for energy efficiency flexibility	High	High	High

Cost components of each option

Costs	
Category:	Description:
Financial	Avoided network reinforcement
Financial	Creation of new market processes/revenues
Environmental	Avoided CO <sub>2</sub> associated with energy efficiency
Social	Bill savings associated with energy efficiency
	Health benefits associated with energy efficiency
	Mental health associated with energy efficiency

Key benefits associated with Flex Direct

# WP4: BAU Transition and Data Discovery / Approach

## Objectives

- To identify the requirements to standardise energy efficiency flexibility into BAU and enable the DSO to visualise energy efficiency retrofits (and their potential impact on capacity) across the network through a review of existing data sets
- Engagement with key DSO teams to understand data and user requirements, and engagement with Social Landlords, as facilitated by CSE, to understand data sharing with the DSO

## Approach



1	<b>Desktop review</b>	<ul style="list-style-type: none"><li>• Desktop review of existing public data on energy efficiency retrofits across UK Power Networks' area and review of UK Power Networks' existing datasets and tools</li></ul>
2	<b>Engagement with DSO and Utilita</b>	<ul style="list-style-type: none"><li>• Engage with UK Power Networks' DSO Flexibility and YLNZH teams to understand requirements for visualising energy efficiency retrofits</li><li>• Engage with Utilita to elicit expert views on retrofitting, data and processes</li></ul>
3	<b>Refining of data requirements</b>	<ul style="list-style-type: none"><li>• Analysis of workshop findings and DSO team preferences to identify appropriate solutions</li></ul>
4	<b>Engagement with Social Landlords</b>	<ul style="list-style-type: none"><li>• Engage with Social Landlords to understand their abilities and preferences in providing flexibility through energy efficiency retrofits, as facilitated by CSE</li></ul>
5	<b>Final data and user requirements</b>	<ul style="list-style-type: none"><li>• Analysis of workshop findings and Social Landlord preferences to identify appropriate solutions</li></ul>

# WP4: BAU Transition and Data Discovery / Engagement Summary

Stakeholder	Method	Key Findings
	In-person workshop with DSO Flexibility team	<ul style="list-style-type: none"> <li>• Preference for any future process to use the existing tools – Localflex</li> <li>• Recognised the challenge that metering data poses in the social housing sector – were comfortable to eliminate the requirement for metering data</li> <li>• Comfortable to decouple metering data upload from settlement process</li> </ul>
Social Landlords	2 x virtual workshops, facilitated by CSE	<ul style="list-style-type: none"> <li>• Early preferences for commercial framework options when shown underlining processes</li> <li>• Given removal metering data requirement under new baselining approach, preliminary data requirements appeared acceptable</li> </ul>
	Weekly project calls 1-1 meeting with ECO team; ECO Delivery Manager and Retrofit Coordinator Lead	<ul style="list-style-type: none"> <li>• Understanding of data captured by energy suppliers under Energy Company Obligation (ECO)</li> <li>• Understanding of retrofit installation &amp; coordination process and responsibilities of ECO Delivery team</li> </ul>
	Weekly project calls and dedicated WP4/WP5 fortnightly calls	<ul style="list-style-type: none"> <li>• Continued alignment of data requirements under modelling approach developed</li> </ul>
	Dedicated 1-1 meetings with YLNZH Product Owners and Net Zero Associates	<ul style="list-style-type: none"> <li>• Understanding of data captured as part of YLNZH , including six mechanisms through which LAs can share their decarbonisation plans</li> </ul>
SIAPARTNERS	Ongoing internal alignment	<ul style="list-style-type: none"> <li>• Continued alignment of data requirements and underpinning processes under commercial frameworks developed</li> </ul>



# WP5: Our process for selecting a baselining approach

1. We outlined four approaches describing how metering, public data and modelling can be differently used.

## Four baselining approaches

1. Before and after **aggregate** measurement

2. Before and after **heating asset** measurement

3. Model baseline and measure after

4. No demand measurement

2. Through our own analysis and validation with the DSO and social landlords, we selected a preferred approach.

Preferred/  
selected

## Point-of-use options

1. Peak demand savings

2. Peak demand

3. Peak saving per kW installed

3. We have developed options for how the preferred approach can be implemented. These will be tested with the DSO and social landlords.

## Development and data options

Methodologies we could use

1. NEED: National Energy Efficiency Data framework

2. Standard Assessment Procedure / Home Energy Model methodology to estimate energy performance of homes

3. DEFENDER SIF Project outputs

4. Monitor & Revise

# WP5: Our process for selecting a baselining approach

## Proposed approach

The proposed approach to trial is for Flex Direct payments to be based on standardised estimates of peak savings, rather than measurements.

This is based on feedback:

- **The DSO** has a strong preference for simplicity
- **The SHPs** have strong preference for simplicity and confidence of payment value, over maximising payment value

4. No demand measurement Preferred/selected

## Remaining decisions

We are now considering options for two of the most key remaining decisions:

1. **Point-of-use options:** How are peak demand savings determined for a given housing development from simple pre-determined tables and/or functions?
2. **Development and data options:** How does the DSO derive and maintain the standardised tables and/or functions characterising the expected peak demand savings?

### Point-of-use options

1. Peak demand savings

2. Peak demand

3. Peak saving per kW installed

### Development & Data options

1. NEED

2. SAP / HEM

3. DEFENDER / SIF

4. Monitor & Revise

# WP5: Expected peak demand reductions for common measures

We expect between 0.1 - 1.2 kW peak demand savings per household

**Our methodology is based on what savings are realised in practice**

- Results are based on Government NEED data which compares annual energy consumption in similar properties, with and without measures
- Typical load factors, diversity factors and efficiency measures are applied to the energy consumption to estimate peak demand reduction
- **Key benefit:** Approach factors in the imperfect implementation of measures and behavioural rebound effects

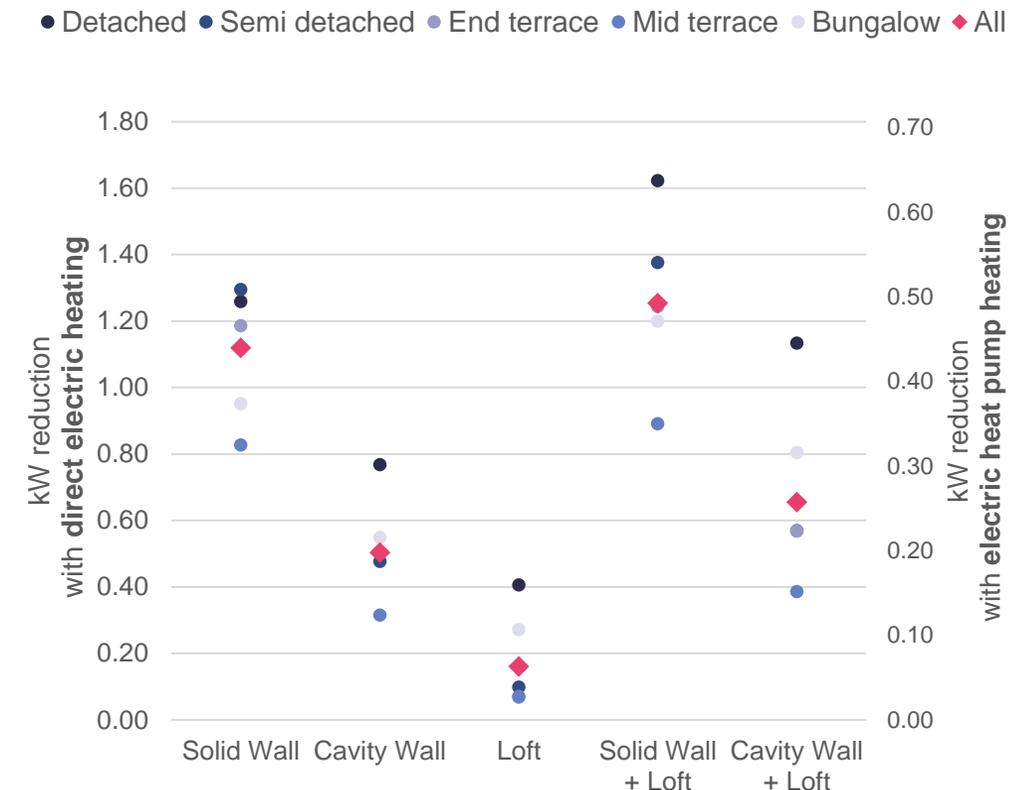
**We expect between 0.2-1.2 kW peak savings to be typical for households with direct electric heating, or 0.08-0.5 kW for those with heat pumps**

- Graph shows direct electric heating savings on the left axis, and heat pump heating savings on the right

**Uncertainty remains about how variable the peak savings will be**

- Wide variation even between same housing type and measure when considering annual energy savings.
- Key point: We expect peak demand reductions to be less variable than annual energy savings, as some consumption variation only affects off-peak demand

Peak demand reduction estimates  
Diversified impact per property



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# Project Plan Update

# Key Risks

Please see Project Management Book for full list of Alpha Phase risks – only the key risks have been highlighted below.

Ref	Risk Description	Likelihood (Low/Med/ High)	Impact (Low/Med/ High)	Mitigation	Status
R1	Difficulty in identifying and recruiting Social Landlords that are suitable to participate and engage with the research to validate and inform the wider project	Low	Medium	<p>WP2 has been designed to develop eligibility criteria of LAs and SHPs to reduce risk identified by UKRI in Discovery and ensure targeted engagement is able to inform the wider project. WP2 will also facilitate engagement workshops required for WP3-5. The engagement will be led by CSE, a leading independent research organisation, as recognised by UKRI, to ensure best practice is followed.</p> <p>This has been mitigated by utilising relationships developed in Discovery and within project partner's own networks to appropriately identify and engage with stakeholders to support the research. Additional engagement has occurred outside of workshops to address questions from Social Landlords and encourage their engagement.</p>	Closed
R19	If social housing upgrades include converting the heating system from gas powered to electric then the electricity usage will increase even though overall energy usage reduces, which could impact the validity of the Flex Direct proposal	Medium	High	<p>The DSO Flexibility team accepts that although usage of electricity will increase, when appropriate insulation is fitted in parallel it still reduces the total electricity required when compared to the base case of no insulation fitted. Therefore, Flex Direct Proposal is still valid. The Flexibility team's aim is to incentivise positive behaviours, and not to disincentivise them.</p>	Closed
R21	Typical energy efficiency and peak demand savings are not realised in a social housing context, due to a greater prevalence of underheating in the properties prior to the measures being installed (causing "rebound effects").	High	Medium	<p>The Flex Direct commercial framework should not penalise housing developments that house tenants at risk of fuel poverty, or encourage behaviours that could be to tenants detriment. The DSO Flexibility team acknowledge the business risk introduced by the rebound effects and that it could result in peak demand savings that do not materialise. Due to limited data, the scale of impact (both the prevalence and severity) of the rebound effect is unknown and so must be considered and monitored.</p>	Open

# Project Specific Conditions

Condition	Description	Update
1	The Funding Party must not spend any SIF Funding until contracts are signed with the Project Partners for the purpose of completing the Project.	Complete
2	The Funding Party must report on the financial contributions made to the Project as set out in its Application. Any financial contributions made over and above that stated in its Application should also be reported and included within the Project costs template	On track
3	The Funding Party must make reasonable endeavours to participate in all meetings related to the Project that they are invited to by Ofgem, UKRI and DESNZ during the Alpha Phase.	On track
4	Alpha phase will last for a period of 8 months from the date the Project Direction is issued (2 <sup>nd</sup> October 2024), the Project will be allowed a flexible start date within the 8 month period. The Project must provide the monitoring officer with the start date and must complete within 6 months of the start date and cannot be completed after the 8 month period has ended.	Started 1 <sup>st</sup> November 2024  Project Completion by 30 <sup>th</sup> April 2024

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# Alpha Lessons Learnt so far

- Partners are working more iteratively than planned to foster collaboration and effective development of work packages
- Providing pre-read materials prior to workshops can help stakeholders more effectively engage

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# Next Steps

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# Next Steps

The Alpha Work Packages are validating that key stakeholders (DSO, Social Landlords, Flexibility Aggregators) recognise the value in the Flex Direct proposition. The project partners are working to shape the framework to maximise participation and benefits through engagement.

The project partners have expressed an interest in developing a proposal for Beta. If the Beta trials are successful then the proposed model will be considered for implementation as BAU.

Once Alpha has been delivered, we will work on the following:

- 1** Secure Social Landlord trial partner(s) and identify trial site(s)
- 2** Consider opportunities to expand or develop the Flex Direct proposed framework
- 3** Target a joined-up delivery trial, that will be used to test and evidence that the proposal is feasible

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# Questions