XOSERVE

Welcome to our
Project Trident Customer Engagement Day

✕ Purpose for today

1. To launch Project Trident's **Outline Business Case**.

2. To ensure customers understand the processes and research undertaken to get to **our preferred option** for Project Trident.

3. To provide customers with an opportunity to **learn more about UK Link**.

4. To share and discuss plans for **the procurement stage**.

5. To help **shape next steps** with customer input and feedback.

Project Trident Progress

Presented by:
Nick Partridge

Project Trident

Xoserve launched Project Trident in July 2024, in response to SAP's planned **discontinuation of standard support** for SAP ECC6 IS-U in 2027.

UK Link being out of standard support would lead to increasing risk to the reliability over time, increased support costs and constrain the ability to efficiently implement change.

Project Trident will also support Xoserve to prepare for the future of UK Link, **requirements for agility, flexibility and scale in alignment with future industry change,** and modernisation is required as extended support alone will be insufficient to maintain a reliable service.

HMT Green Book approach

We will follow the HMT Green Book which provides three iterations of the business case, progressively building the case for change:

1. **Strategic Outline Case**: Focus is on building the case for change establishing the rationale for intervention and identifying **a long list of options** to address our problem.

2. **Outline Business Case**: Focus is on refinement of our options to a short list, leading to identification of **a preferred option** and how we propose to procure this.

3. **Full Business Case**: Confirmation of the **Project Trident solution**, including outcome of procurement, proposed delivery approach, budgets etc.

Our due diligence and business cases are reviewed by **our Independent Assurance Partner, PwC**.

Our OBC is made up of five sections

Strategic Case

Discusses why the project is necessary

Economic Case

Discusses how the preferred option was selected

Commercial Case

Presents our market engagement progress and commercial / procurement strategy

Financial Case

Discusses funding and financial affordability

Management Case

Details how the project will be run

Clear plan of action
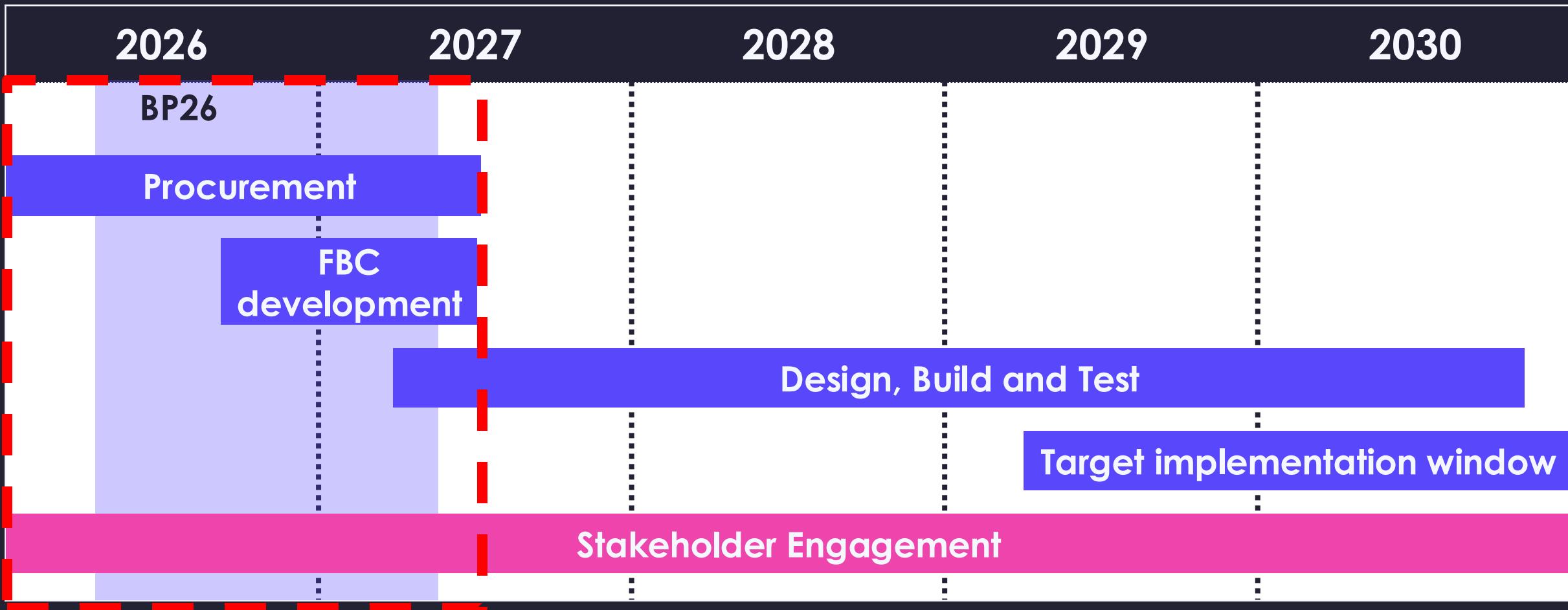
	2026	2027	2028	2029	2030

BP26

Procurement

FBC development

Design, Build and Test

Target implementation window

Stakeholder Engagement

Note: Project Trident timelines are being informed by our engagement and procurement activities. These are indicative dates as of Q4 2025 and will be developed further.

Customer Advisor Decision Making Input

February 2026

Project Trident
Customer Implications

What does that mean for customers?

➢ Chance to improve processes and functionality at a lower or minimal cost than through BAU.

➢ Change can become an easier and more flexible.

Attendant risks

➢ Opportunities missed for all or some customer groups resulting in higher costs later on.

➢ Development of unwanted processes or functionality ("Gold-Plating")

➢ Loss of valued functionality during move away from existing processes

How these can be avoided?

Project Trident
Customer Advisors

Xoserve want to make sure customers have their voice heard during Project Trident.

➢ **Lots of customer engagement by Xoserve.** Customer updates and public engagement done by the Project Trident Stakeholder Engagement team.

➢ This can only go so far without compromising Xoserve's (and so the industry's) commercial buying power.

➢ To allow direct input of customer needs, the Customer Advisor role has been created. Shipper and Transporter.

Project Trident
Customer Advisor Role

Having a single individual in attendance for each constituency means that more information can be provided directly to the Customer Advisor who can provide more insightful feedback to the Project Trident team as Xoserve takes decisions.

The Customer Advisors role is to bring independence, challenge & advice to the Project Trident Steering Committee, contribute towards decision-making, providing the "Voice of the Customer" and engage with customers whilst doing so.

Project Trident
Customer Advisor Role – to date

➢ Engagement with shippers through the stakeholder forums and bilateral meetings set up at Shipper's request.

➢ Direct input into the choosing of the Preferred Hypothesis to provide flexibility to accommodate future at lower costs. Preferred Hypothesis aligns with those discussions.

➢ Engagement with senior management team regarding UNC changes and their impact on Project Trident.

➢ Discussion of the outcome of the Pain Points activity, setting out need for clear and timely categorisation of potential enhancements.

➢ Input on current change landscape for Shippers, shaping engagement expectations.

Project Trident
Customer Advisor Role – future

Going forward

➢ Engagement with Project Trident team regarding procurement. Take the form of engagement with team outside of direct vendor discussions.

➢ Continual input at Steering Group meetings through movement to Full Business Case and DBT phases.

➢ Continual Dialogue over Pain Point management and change landscape.

➢ Continued direct engagement with Shippers through bilateral and group discussions.

Project Trident
Customer Advisor Role - Challenges

➢ Dozens of Active shippers with different needs as they operate in different aspects of the market

➢ Demonstrate by the Pain Points feedback some prioritise some areas of improvement than others. Not all pain points will be resolvable through Project Trident

➢ Customer engagement on progress of Project Trident is for Xoserve's Project Trident customer engagement team. Clear delineation between the two roles – does that need to be wider?

Project Trident
What I need

The Customer Advisor Shipper role is to be the voice of the Shipper in meetings. To do this understand what shippers need.

➢ Want to meet bilaterally with shippers and have done so.
➢ We have regular drop-in sessions. Just had one on 30th January
➢ Intention to provide a shipper advisor role view at key meeting points going forward.

Engagement with some shippers has been good.   Been limited to a few parties, however.   **Should this limited engagement with some shippers be taken as a good thing, i.e. you are confident about Project Progress?**

Further contact details
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Please use "Project Trident" in the subject line

Project Trident Options Analysis
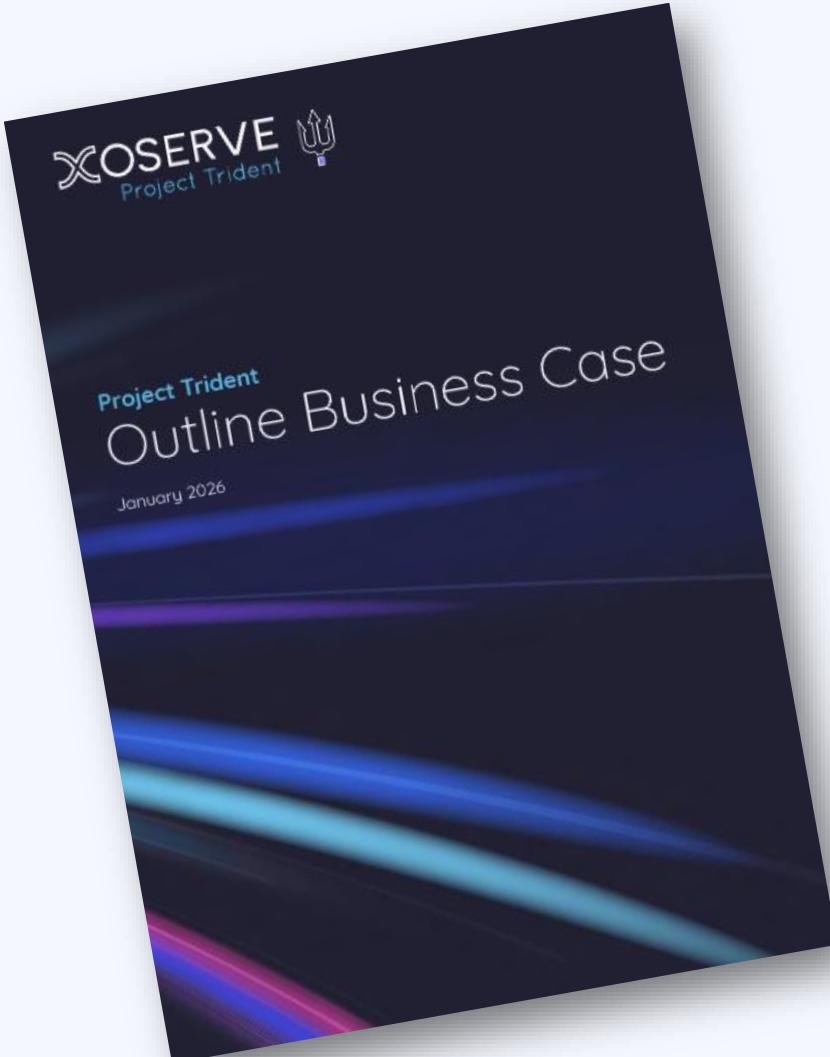
A key message in the OBC is the **selection of SAP Hybrid as the preferred option** for Project Trident.

Our options analysis for how we made this decision can be found in **the Economic Case of the OBC**.

This shows the journey from **six, to three, to one option**.

✕ Options analysis

We conducted thorough assessments of the options against Critical Success Factors:

Critical Success Factor	Custom Build	SAP	SAP Hybrid
Affordability (cost to implement)	4	30	27
Value for Money (lifecycle costs)	33	21	22
Strategic Fit	9	14	24
Capability (ability to deliver modernised UK Link)	3	28	24
Achievability (ability to deliver project)	16	28	27
Total	**65**	**121**	**124**

OBC Table 6: CSF Assessment Summary

Interactive breakouts

We held four interactive breakout sessions that customers could attend.

The following slides contain two key themes from these discussions and questions.

⏳ UK Link

The two key themes: limiting Customer impact during migration and customisation.

- **Limiting customer impact during migration:** We are pursuing the least disruptive option for migration, which in our test migration had a downtime of 25 hours. We will align the move to S/4HANA to be aligned with other industry activity to limit disruption as much as possible.
- **Customisation:** Our Preferred Option is SAP Hybrid with the core being a straightforward migration approach and the Evolve stage looking at Microservices and customisation. We want to work with Customers to cocreate Evolve to address future industry needs.

✕ Solution Definition

The two key themes: Appropriate testing & engage appropriate parties.

- **Plan appropriate testing:** As well as normal testing scenarios, our discussions highlighted the importance of including usual scenarios and negative testing to ensure error conditions and invalid behaviour are correctly handled.
- **Engage appropriate parties:** Learning from similar projects by working closely with industry partners. Customers highlighted the importance of bringing Uniform Network Code (UNC) expertise into the project to ensure code compliance. They raised the need for the system to be built to support the code, rather than vice-versa.

✕ Industry Case Studies

The two key themes: What is the Evolve stage and financial planning.

- **What is the Evolve stage** - The GrDF case study was used to explain how they had a two-phase approach to stabilise their core as they moved to S/4HANA and then evolve their customisation. This is a similar approach to our Preferred Option.
- **Financial planning**- Providing value for money is at the heart of Project Trident. Understandably Customers wanted to understand if it's possible to have more actual vs forecast costs for the project. This is something we will explore and update Customers on in the coming months.

Customer Feedback

The two key themes: Pain points and procurement.

- **Pain points:** Customers wanted to understand the next steps with UK Link pain points and how we prevent implementing fixes that result in unintended consequences elsewhere. Xoserve is taking a programmatic approach to the pain points to assess dependencies. Not all pain points will be incorporated into Project Trident.
- **Procurement:** Customers explained how important effective procurement is to provide a clearer financial picture for them. Project Trident is committed to undertaking a robust procurement process that delivers a value for money outcome. DSC Contract Managers will be engaged at each procurement milestone with updates.

Procurement Approach

Presented by:
Nathaniel Collins

Procurement Approach

- Project Trident will now move into **its procurement phase,** which has been designed to select the optimal delivery partners.

- We have created this approach to balance **price, quality, risk and flexibility** in the long term.

- **We have already begun with early market engagement.** This confirms robust vendor interest in these partnership opportunities.

- We expect to complete our procurement phase and move into the Design, Test & Build phase by **summer 2027.**

Upcoming procurements

We will run **two procurements** to acquire delivery partners:

**RFP 1
Transformation Partner**

To provide Technical Assurance over the work of our Core Services Partner, and to ensure that Project Trident is embedded within our evolving programmes and projects.

**RFP 2
Core Services Partner**

To implement our preferred option as described within the Outline Business Case.

Next Steps

Presented by:
James Spicer

Clear plan of action
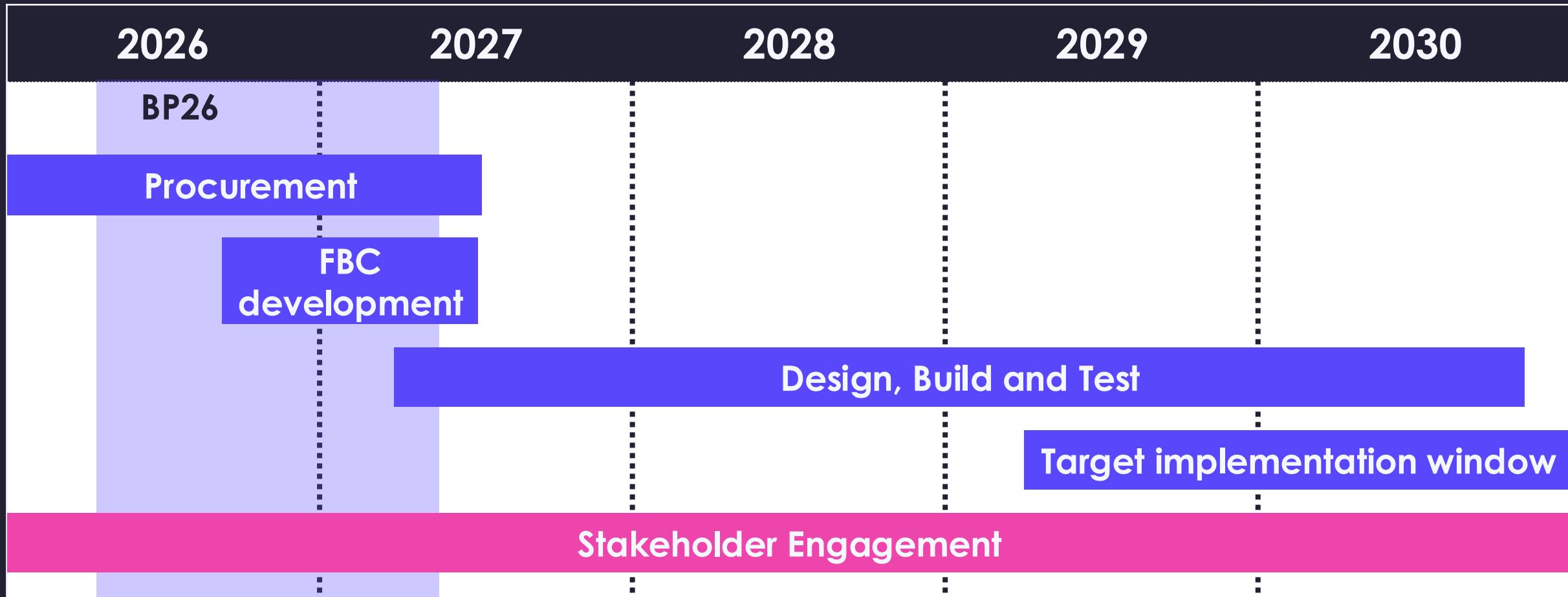
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HMT Green Book Business Case Progression
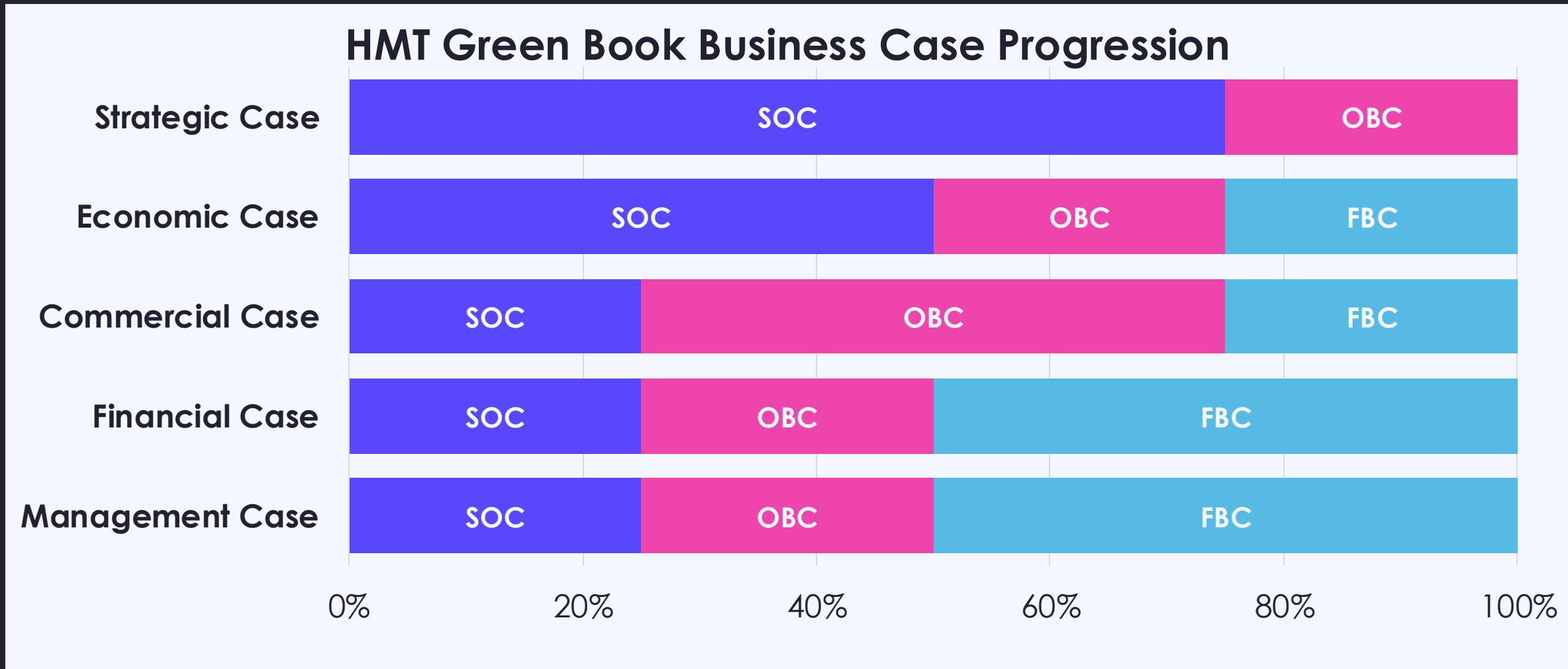
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Strategic Case
Revisions and updates

Economic Case
Finalised options

Impact assessment

Risk assessment

Commercial Case
Procurement executed

Suppliers appointed and costs finalised

Financial Case
Final costs & funding/ financial approach

Economic and financial appraisal

Management Case
Delivery approach and schedule

Governance

Stakeholder approach

✕ Customer Engagement

- **We will continue our regular engagement** including newsletters, updates to DSC governance, and Customer Advisor sessions.

- Throughout procurement, communications will take place at key milestones with **commercially sensitive information redacted**.

- Begin engaging the industry on the **Evolve stage.** Customers can participate in developing **future requirements** for UK Link, based on changing industry needs.

✕ Planning for migration

Throughout the procurement phase, we will continue to plan for migration and mitigating risks to CDSP services.

Led by our Architecture Team, we will conduct a second phase of our Solution Definition work to investigate and mitigate the migration risks for SAP integration components and data that are currently used.