

Mobilising SMEs workstream — Perseus Advisory Groups

Advisory Groups — Ignition Phase

Purpose: To convene and represent actors from across the market that will pilot a UK-wide programme to support SMEs.

Outcome: Automate greenhouse gas (GHG) reporting for small and medium enterprises (SMEs) and improve access to environmental, social, and governance (ESG) data, and engage with SMEs to deliver Net Zero outcomes.

Roles and responsibilities

Advisory Group Members

The purpose of the Advisory Groups are to provide expert input to the programme, to address commercial, non-commercial and public needs. Participants will include a wide range of subject matter experts to meet the diverse needs of the project, and to ensure it is representative of stakeholders.

Members of Advisory Groups will act as a representative of their industry and not of their individual company or body: expertise must be contributed as impartially as possible. Work and outputs shall align with existing work and best practices (e.g. Energy Data Task Force Data Best Practice Guidelines, Open Banking, Open Energy) with practical, demonstrable examples to address the mission, and to underpin the business case.

The ultimate objective is to arrive at a standardised approach that is fit for purpose for, and can be rapidly deployed across, the market. It will address social, economic, environmental, public and private sector needs. It will deliver cross-industry alignment on the approach, including clear use cases, a roadmap for work, definitions of risks, gaps and opportunities, and it will provide recommended approaches and resolutions.

Participant roles and time commitment Advisory Group members must assign relevant subject matter experts to:

1. Engage with and prepare for the meetings with provided pre-reading
2. Attend the Advisory Group meetings
3. Provide feedback before, during and after the meeting to shape outputs
4. Attending potential additional interviews/meetings with researchers [optional]

The time commitment for the Advisory Groups is up to half (0.5) a day in aggregate (including preparation time). The time requirements for 2023 will be defined as part of the scoping process. This is not expected to exceed three (3) additional days over the year.

Co-chairs

Each Advisory Group will have one individual with deep finance expertise, and one with deep expertise related to open and shared data.

Mobilising SMEs workstream — Perseus Advisory Groups

Co-chair responsibilities include:

- Review and agree on Terms of Reference
- Prepare and chair the Advisory Group meetings
- Ensure the meetings and agenda support delivery of the Advisory Group outputs
- Ensure the Advisory Groups is inclusive and captures stakeholder feedback to shape the direction of the project and outputs.
- Support the delivery of Perseus through working alongside other Advisory Group co-chairs and the B4NZ and Icebreaker One team
- Represent the Advisory Group at the Perseus Steering Group meetings

Co-chairs commit to up to 1 day per month, this includes attending Advisory Group briefings, the Advisory Group meetings and Steering Group meetings.

Transparency

Outputs from the work will be, as deemed appropriate, transparent and open. This includes updates published on the websites and social media on a regular basis. These will be published under an open licence (CC-BY).

Advisory Group members consent to be listed as participants. Participants shall sign a formal Agreement to these Terms of Reference.

Perseus Advisory Groups

1. User Needs & Impact Advisory Group	3
2. Data Publishing Advisory Group	4
3. Data Licensing Advisory Group	5
4. Engagement & Communications Advisory Group	6
5. Policy Advisory Group	7

Mobilising SMEs workstream — Perseus Advisory Groups

1. User Needs & Impact Advisory Group

Purpose

This group will explore, prioritise and work through use cases that should be supported by B4NZ. This includes identifying defined users, their needs, mapping the data value chain and the broader ecosystem surrounding each use case. It will also agree to the data and measurement requirements that represent the greatest potential for materiality, and that can be linked to incentives which can operate at market-wide scale. This will also identify the appropriate underlying framework and reporting standards (eg. with PCAF, CDP). Impact to develop the business, value and impact cases for the programme and its impact on the UK policy targets, banks, SMEs, and financial instruments. This will include the potential for policy and market-wide interventions.

Advisory Group outputs will be the review and endorsement of the following:

- Long list of use cases
- One prioritised, documented use case
- Benefits of the prioritised use case
- Data and measurement requirements for the prioritised use case
- Linked incentives that can operate at market-wide scale
- Identify and select the appropriate underlying framework and reporting standard for this use case

These outputs will be researched, drafted and documented by our research team, in collaboration with Advisory Group members and with feedback from Domain Experts.

This Advisory Group will meet every 6 weeks to input and shape the development of Project Perseus.

The skills and expertise from participants will include:

- Identifying and defining user, market and societal needs
- Understanding market/ecosystem requirements and functional capabilities
- Articulating the consumer, market, societal and economic/financial benefits
- Understand and quantify the impact to business
- Understanding of the impact of Project Perseus on UK policy and financial instruments

Key research and written requirements for this advisory group includes:

- Co-developing a long list of use cases
- Documentation of the prioritised use case and its benefits
- Data and measurement requirements for the prioritised use case
- Summarise the incentives that can operate at market-wide scale
- Document the appropriate underlying framework and reporting standard for the use case
- Provide supporting evidence from desk research, interviews etc

Mobilising SMEs workstream — Perseus Advisory Groups

2. Data Publishing Advisory Group

Purpose:

This group will research, review, and agree technical metadata and data standards for publishing data, including machine-readable standards and data access (e.g. APIs). The outputs of this group will include documented metadata standards and data standards for publishing.

Advisory Group outputs will be the review and endorsement of the following:

- Review the Open Energy Data Sensitivity Classes and adapt to Perseus
- Agree metadata standards for data publishing
- Agree data standards for publishing data
- Agree machine-readable standards and data access conditions
- Apply the standard licences developed to allow Shared Data to flow through the Trust Framework

These outputs will be researched, drafted and documented by our research team, in collaboration with Advisory Group members and with feedback from Domain Experts.

This Advisory Group will meet every 6 weeks to input and shape the development of Project Perseus.

The skills and expertise from participants will include:

- Finance or energy data owners or providers
- Finance or energy data consumers, including startups
- Data analysts: in particular those responsible for finding and utilising data within finance, energy or policymaking
- Data and/or metadata publishing and maintenance
- Experience in managing data catalogues
- Data managers
- Experience and knowledge of open data
- Experience of CKAN
- Experience with standard systems, processes and technologies used in the energy industry
- Policy and compliance

Key research and written requirements for this advisory group includes:

- Documented draft Perseus Data Sensitivity Classes
- Documentation of metadata standards and standards for publishing data
- Provide supporting evidence from desk research, interviews etc

Mobilising SMEs workstream — Perseus Advisory Groups

3. Data Licensing Advisory Group

Purpose

This group is focussed on developing standard legal data licences that allow Shared Data to flow securely across the market, with consent, in alignment with Data Sensitivity Classes. This will include key policies, such as conditions for participation, roles and responsibilities. The outputs of this group will address the necessary licences and requirements for a functioning access control.

Advisory Group outputs will be the review and endorsement of the following:

- Review the Open Energy Data Sensitivity Classes and adapt to Perseus
- Develop the standard licences to allow Shared Data to flow through the Trust Framework
- Define conditions for participation, roles and responsibilities

These outputs will be researched, drafted and documented by our research team, in collaboration with Advisory Group members and with feedback from Domain Experts.

This Advisory Group will meet every 6 weeks to input and shape the development of Project Perseus.

The skills and expertise from participants will include:

- legal professionals, especially those with finance, energy data and/or other data licensing expertise
- Energy data providers who are familiar with or wish to share their data under a shared data licence through the Trust Framework
- Data consumers, startups and innovators
- In-house data governance and compliance
- Information security, with a focus on data sharing
- Digital and data transformation Data policy analysts
- Open data licensing, open source and content licensing – specifically to understand lessons that have been learnt in this area and, where applicable how they may apply to shared licensing

Key research and written requirements for this advisory group includes:

- Documented draft Perseus Data Sensitivity Classes
- Develop and document the standard licences to allow Shared Data to flow
- Provide supporting evidence from desk research, interviews etc

Mobilising SMEs workstream — Perseus Advisory Groups

4. Engagement & Communications Advisory Group

Purpose

This group is designed to address the user experience, signposting and inspiring behavioural change. The outputs of this group are intended to create awareness, engagement and impact with stakeholders.

Advisory Group outputs will be the review and endorsement of the following:

- Perseus messaging
- Clear communication of the benefits
- Engagement with Advisory Group members' organisations
- Open Engagement through broader consultation with the industry
- A detailed communications plan for 2023-2024
- Communications plan and messaging for COP28

These outputs will be researched, drafted and documented by our research team, in collaboration with Advisory Group members and with feedback from Domain Experts.

This Advisory Group will meet every 8 weeks to input and shape the development of Project Perseus.

The skills and expertise from participants will include:

- Communications professionals specialising in finance communications
- Understanding how to digest and articulate user benefits
- Experience in developing communications plan

Key research and written requirements for this advisory group includes:

- Documented messaging to communicate the benefits of Perseus
- A detailed communications plan for 2023-2024
- Clear messaging for COP28
- Provide supporting evidence from desk research, interviews etc

Mobilising SMEs workstream — Perseus Advisory Groups

5. Policy Advisory Group

Purpose

This group aims to address potential policy interventions (including corporate policy such as potential in loan conditions, procurement and/or FCA/Ofgem intervention), as part of the development of Project Perseus.

Advisory Group outputs will be the review and endorsement of the following:

- Documented policy and process for participant vetting, authorisation and conditions
- Documented approach to consent, data use, privacy and onward sharing
- IP rules, liability, dispute resolution and redress
- Recommendations to Government and/or the regulator

These outputs will be researched, drafted and documented by our research team, in collaboration with Advisory Group members and with feedback from Domain Experts.

This Advisory Group will meet every 8 weeks to input and shape the development of Project Perseus.

The skills and expertise from participants will include:

- Legal professionals, especially those with data and content licensing expertise
- Policy analysts with specific expertise in data, finance, energy and sustainability
- An understanding of conditions for participation in Net Zero and ESG regulation, data ecosystem, roles, responsibilities, liabilities, opportunities and risks

Key research and written requirements for this advisory group includes:

- Documented policy and process for participant vetting, authorisation and conditions
- Documented approach to consent, data use, privacy and onward sharing
- Provide supporting evidence from desk research, interviews etc

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Vision, Mission, Values

Vision

To unlock the potential to modernise GHG data access and interoperability in the UK that will be a catalyst for behaviour change. Create a net zero data ecosystem that creates clarity and certainty in supply chain metrics and visibility that works for everyone, and accelerates our transition to Net Zero.

Mission

To deliver Codes of Practice that could lead to a potential B4NZ Standard comprising Search and Access control capabilities, supported by a sustainable business model:

1. Refine and iterate on a clear, trusted, impactful and detailed governance framework that enables government, businesses, consumers and 3rd party developers to understand the potential of open access to ESG data in the UK.
2. Based around refined and prioritised use cases, create detailed descriptions of the user needs, data value chain and application of the framework in practice.
3. Refine and onboard organisations to the ESG Search and Access Control as industry-facing operational services.

Values

Openness

We will:

1. share our views and plans, and share knowledge as widely as possible;
2. solicit and listen to views from end users and stakeholders;
3. make our outputs available under an open licence (e.g. CC-BY, OGL).

Expertise

We will:

1. bring our expertise to the discussion as individuals;
2. use our expertise to synthesise the views of others in constructive and forward-thinking proposals;
3. use good judgement to respect privacy and confidentiality.

Collaboration

We will:

1. support each other in discussion, in decisions, and in delivery;
2. constructively hold each other to account on our commitments;
3. ensure all voices are heard and considered carefully.