

Perseus Advisory Group AG2 - Technical Infrastructure

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Links

Previous and related documents and links.

AG1: <https://ib1.org/2023/06/23/perseus-ag1-impact-agreed-scope-of-work-for-phase-one/>

 Perseus AG1 July & Sept Meeting Summary Report 2023-09-06 #shared with group

Assets: <https://ib1.org/perseus/assets/>

Success metrics

Criteria that will be used to measure the group's success, including impact and influence. This might include public recognition, effective policy implementation, successful resolution of technical issues, or creation of legal guidelines.

- Diversity of participants (in terms of organisation type)
- Level of attendance
- Engagement with the project outside the AG meetings
 - Referrals to people who can advise on the technical infrastructure
 - Providing reference materials
 - Recruitment of additional suitable AG participants
- Delivery of the outputs
 - Technical design for demonstrator, sufficient to be used as the basis for building one
 - Expanded design for production service, with roadmap to get to it from the demonstrator
- Achieving consensus/majority endorsement of approach

Scope

The specific area of focus for the group, such as communications, policy, technical issues, or data rights and legal matters. Be explicit about what is in scope 'now' and what must, should or could be in scope 'later'.

Scope for 2023 is to define, with a view to the long-term, what is required to deliver a demonstrator ready for COP28. Note that a *demonstrator* needs to support the story we're telling about Perseus at COP28, but does not have to be an MVP, nor a technical proof-of-concept.

The **initial** scope of Perseus is sharing electricity data about SMEs with carbon-accounting firms, with the consent of the SME, for the purposes of the demonstrator. Note that non-functional requirements, such as security or compliance concerns, are for AG3 to identify, and are not part of the demonstrator.

Beyond this initial scope, consider how the expansion of use cases, led by AG1, might impact how much of the processes and infrastructure can be reused, and what additional rails and processes may need to exist to address these.

Users & Stakeholders

Identify the key users and stakeholders involved. They could be banks, government bodies, small businesses, policy analysts, technical experts, legal professionals, financial experts, privacy advocates, or data analysts.

From a technical infrastructure perspective, stakeholders split into different groups

1. Energy data source (e.g. retailer, aggregator)
2. Consent giver, SME (the user of the energy and to which GHG footprinting applies)
3. Application / App (the carbon calculator that generates reports)
4. Bank (recipient of reports)
5. Onward sharing with assurance flag(s)
6. Government and regulators

These users need to be mapped against the definitions of source, third-party provider (TPP), etc as per the definitions of open banking and open energy.

Needs

Identify and narrate the user needs of each stakeholder involved with a clear lens on implementation. This might include impact needs (for decision-making), business cases, specific data needs, reporting needs, financial models, policy guidelines, technical solutions, or legal guidance.

Emerging needs from AG1 include:

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1. What data (e.g. kWh)
2. What formats (e.g. XML, XBRL compliant)
3. Which endpoints (e.g. FAPIs)
4. Consent and consent management
5. How verification and assurance can be technically applied

The immediate need is the demonstrator, and to map out what will require attention in future development to meet the needs articulated by AG1.

Maps of data and consent flows will help stakeholders understand where they fit, and what their roles and responsibilities will be in the full system.

Objectives, recommendations and outcomes

Clearly define the specific goals the group aims to accomplish. Depending on the group, these could be increasing awareness, defining policy direction, tackling technical challenges, or resolving data rights and legal issues.

For each recommendation in this Group, we wish to ensure it delivers the Scope, aligned with three challenge questions. Does this Group address the Scope?

1. *If not, why not?*
2. *If so, why and at what scale?*
3. *What are blockers, incentives, and opportunities?*

Assets, and a demonstrator that can be demonstrated by COP28.

Demonstrator involving

- Data sources sharing data with applications
- User experience interface (application)
- Consent management
- Report generated (application) and shared with bank (with verification)

Outputs

Define specific outputs, for example, documented use cases that illustrate user needs, case studies, a defined audience, key messaging, an engagement plan, policy recommendations, technical solutions, or legal reports. Outputs must include, at a minimum, a summary of the needs of the users, value statement(s) and the recommended approach that can be endorsed by the Group.

Map out what technical infrastructure will be required to enable the data to flow for (a) the demonstrator and (b) the longer term.

Define how each participant integrates, including SmartDCC, Demand Logic, Sage, NatWest, and others as examples.

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Identify relevant standards and practices that may apply to the full system.

Demonstration of the verification/assurance process.

Reports

- Short slide and visual summaries of what's going on

Create an FAQ that addresses the main questions in human-accessible language.

Approach & methodology

Make clear the approach this Group will take to deliver against the success metrics.

The Group should aim to address:

1. User/stakeholder categorisation and ecosystem map
2. User/stakeholder input/questionnaire on their needs
3. Interim synthesis report circulated to Group for discussion and endorsement
4. Group discussion
5. Iteration on report
6. Snagging/iteration
7. Formal endorsement & sign-off

Updates, changes, discussion points

Discuss any new developments or shifts in understanding since the last meeting that might impact the Group's objectives.

Background, context

Any supplementary information relevant to the group's focus, such as links to FAQ pages, supporting research, existing policies, technical, or legal inputs.

[Icebreaker One technical documentation](#)

[Overview of Open Banking FAPI](#)

[Technical introduction to FAPI](#)

[Schema.org](#) - contains definitions of common data entities that may be helpful

Orientation:

<https://ib1.org/trust-framework/>

(documents and video)

<https://dgen.net/0/2020/08/15/designing-the-uks-shared-data-infrastructure/>

Endorsements & attendance

Specify the group members who endorse the approach, and record of their endorsement.

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Endorsed

Frank Wales

Ross Doherty

Jaya Chakrabarti

Martina Colman

Oliver Bates

Andrew Griffiths, Planet Mark

Dan Mauger

Pending

Attendance

Name	2023-09-21	2023-10-19	2023-11-16	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD
Jaya Chakrabarti	●	○	●			
Peter Allan	●	○	⊙			
Dr. Kesavan Gopalan	○	○	⊙			
Dr Yildiz Tugba Kara	○	○	○			
Andrew Griffiths	○	○	⊙			
Fabrizio Varriale	○	○	○			
James Armstrong	○	○	○			
Sean Hanafin	○	○	⊙			
Rebecca Harding	○	○	○			
Robin Seaby	○	●	○			
Jonathan Nwosu	●	○	○			
Nick Carmont Zaragoza	●	○	○			
Caroline Bourne	●	●	⊙			
Ciaran Wood	●	●	●			
Matt Overall	●	○	⊙			
Hannah Drake	●	○	⊙			
Rick Curtis	○	○	●			
Dakshesh	●	○	○			
Minsang Kim	●	●	○			
Martina Colman	○	○	○			
Oliver Bates	○	●	●			
Vikesh Sachdeva	○	●	●			
Dan Mauger	○	●	○			

● = in attendance ⊙ = absent/ apologies ○ = Not scheduled to attend