

Perseus 2025 Advisory Groups

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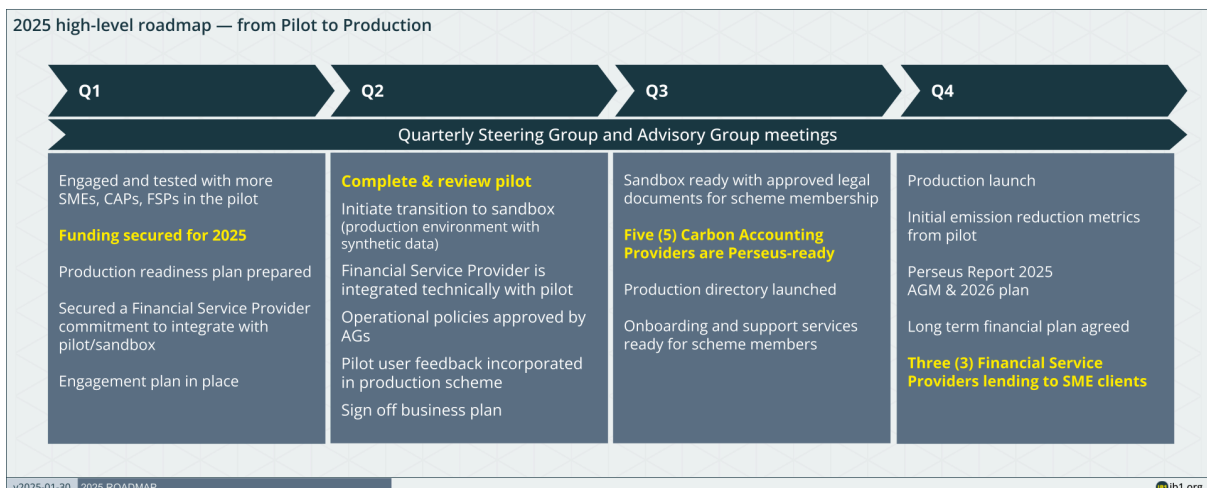
Perseus Overview

Perseus makes it easier for UK SMEs to access green financing by automating their sustainability reporting. To go far together, Persues employs a robust governance process comprising a Delivery Oversight Committee, a Steering Group (SG), 5 Advisory Groups (AGs), and Working Groups (WGs). Working Group descriptions and information will be published shortly. Full details of IB1’s governance process can be found at <https://ib1.org/sops/governance-schemes>

All Perseus Advisory Groups and members commit to respecting the Terms of Reference: <https://ib1.org/terms/tor>, which outline member and co-chair roles and responsibilities.

Frequency of meetings: Quarterly, lasting 1.5-2 hrs.

2025 Quarterly roadmap



Perseus 2025 scope

Perseus will focus on two key areas:

- **Perseus-A:** Implementation of electricity smart meter approach as designed in 2023-2024 by finalising the pilot and using its outputs to prepare for a Production launch
- **Perseus-B:** Identify, prioritise then design and develop the next use case(s)

AG1: Perseus-A user needs and Perseus-B roadmap

Purpose:

AG1 focuses on understanding and addressing the needs of the four primary user groups: Small and Medium Enterprise (SMEs), Carbon Accounting Providers (CAPs), Energy Data Providers (EDPs) and Financial Service Providers (FSPs) (IB1, Perseus 2024 Report – Pilot, page 19) to ensure the Scheme delivers impactful and relevant outcomes. It also works to identify other user groups, define their needs, and prioritise use cases that align with the mission of Perseus. AG1 ensures that user perspectives are integrated into technical, legal, and policy developments, fostering a user-centric approach across the Scheme.

During Q1 and Q2, AG1 will focus on:

- gathering insights from pilot participants on implementation and making recommendations on user needs that should be addressed, and how (e.g. UX, onboarding documents)
- collaborating with other AGs to ensure that user requirements are integrated into technical, legal, and policy developments, to ensure a cohesive approach across the Scheme

In Q3, AG1 will:

- support engagement efforts by identifying opportunities to test Perseus solutions with Members
- capture feedback from all participants and provide actionable insights for continuous improvement

By Q4, AG1 will have synthesised feedback from other AGs and user feedback from the pilot to contribute to the 2025 report and inform the 2026 roadmap. It will explore, prioritise and present recommendations for Perseus-B to ensure the Scheme evolves to address market needs.

Outputs:

- Insights from pilot participants on user needs and implementation challenges.
- Recommendations for addressing user requirements, including UX considerations
- Identification and prioritisation of new use cases to expand the Scheme, including Perseus-B
- Collaboration with other AGs to integrate user requirements into technical, legal, and policy frameworks

- Opportunities for engagement and testing Perseus solutions with additional SMEs
- Actionable feedback from participants to drive continuous improvement.
- Contributions to the 2025 report, including synthesised feedback and recommendations for the 2026 roadmap
- AG1 co-chair reports progress, key decisions and risks to the Steering Group

Recommended skills and expertise:

- Experience in gathering and analysing user insights to inform programme development
- Knowledge of UX principles and user-centric design approaches
- Ability to identify and prioritise use cases aligned with strategic goals
- Strong communication and collaboration skills to engage with other AGs and stakeholders
- Expertise in engaging SMEs and understanding their unique challenges.
- Skills in synthesising user feedback into actionable recommendations for programme improvement
- Meeting facilitation expertise for Working Group leaders and AG co-chairs (full AG co-chair role description here)

AG2: Technical implementation**Purpose:**

This group advises on the technical standards, specifications and infrastructure required to deliver Perseus-A in 2025. It also covers the “developer experience” of organisations integrating with Perseus, including documentation, example code and other technical onboarding materials. Dependent on how Perseus-B develops, there may also be relevant technical aspects to consider for that later in the year.

During Q1 and Q2 AG2 will focus on:

- defining and implementing the technical standards, specifications, and infrastructure required to support the production launch of Perseus-A in 2025
- incorporate learnings from the pilot phase on technical requirements to transition from pilot to full production
- specifying, commissioning, and deploying the production system, rolling out a sandbox environment, and finalising the production Registry

In Q3 and Q4, AG2 will:

- implement onboarding processes, including Know Your Customer (KYC) requirements, and establish operational policies to ensure a secure and efficient technical environment
- ensure that all technical documentation is reviewed and signed off to support the production launch
- contribute to the 2025 report by documenting technical achievements
- providing recommendations for supporting future developments of Perseus-B

Outputs:

- Production system specification, identification, commissioning and deployment
- Review and signoff for technical documentation
- Finalisation of the production Registry
- Rollout of a sandbox environment
- Production launch
- Onboarding and KYC processes
- Operational policies
- Contribute to the 2025 report
- AG2 co-chair reports progress, key decisions and risks to the Steering Group

Recommended skills and expertise:

- Knowledge of building or operating financial or similarly secure data processing environments
- Experience leading or advising on the architecture and implementation of at-scale online services
- Experience with standard systems, processes and technologies for integrating online services (for example REST APIs, OAuth, PubSub)
- Understanding of the implementation of services acting as data suppliers and/or data consumers
- Technical expertise in metadata publishing and maintenance, managing data catalogues, managing data
- Experience with technical policy and compliance
- Meeting facilitation expertise for Working Group leaders and AG co-chairs (full AG co-chair role description here)

AG3: Legal and licensing**Purpose:**

AG3 focuses on developing and refining standard legal data licences to enable secure data flows across the market, ensuring consent where relevant. It aligns with Data Sensitivity Classes and access control frameworks to meet the needs of a production environment. AG3 also establishes key policies, such as conditions for participation, roles, and responsibilities, while addressing the necessary licences and requirements for effective access control.

AG3 will build upon the legal and compliance mechanisms developed during the pilot phase, with a focus on refining the standard contracts and terms for 'Perseus-A' in the first half of the year. During Q1 and Q2 it will:

- incorporate feedback from pilot participants to ensure these documents are aligned with the latest regulatory requirements. This will involve reviewing data sensitivity classifications, access control frameworks, and refining them as needed to meet the production environment's demands
- develop scalable and user-friendly guidelines to support the legal onboarding of Energy Data Providers (EDPs), Financial Service Providers (FSPs), and Carbon Accounting Platforms (CAPs). Collaboration with other AGs will be central to ensuring consistency and alignment across the Scheme

In Q3, AG3 will focus on:

- production launch readiness and onboarding new participants.
- provide legal guidance to facilitate the integration of EDPs, CAPs, and FSPs into sandbox and production systems
- In collaboration with AG5, ensure data flows and usage comply with high standards of security and regulatory adherence, while remaining adaptable to stakeholder needs
- working with AG4 to determine if workshops and/or training sessions are required to help stakeholders understand and utilise the licensing and legal frameworks effectively

These efforts aim to ensure a seamless transition from pilot to full-scale production, while laying the groundwork for the next use case, Perseus-B.

Outputs:

- Updated standard contracts and terms for Perseus-A, incorporating pilot feedback and aligning with the latest regulatory requirements
- Refined data sensitivity classifications and access control frameworks
- Scalable and user-friendly legal onboarding guidelines for Energy Data Providers (EDPs), Financial Service Providers (FSPs), and Carbon Accounting Platforms (CAPs)
- Clear legal documentation for participant integration with sandbox and production systems
- Collaboration with AG5 to ensure compliance with high standards of security and regulatory adherence
- Training and workshop materials to support stakeholder understanding and use of licensing frameworks
- Contributions to the 2025 report, including insights on legal frameworks for Perseus-B
- AG3 co-chair reports progress, key decisions and risks to the Steering Group

Recommended skills and expertise:

- Expertise in legal and compliance frameworks related to data governance
- Experience drafting and negotiating data-sharing agreements and licences
- Knowledge of regulatory standards such as GDPR and national data protection laws
- Familiarity with managing data sensitivity classifications and access control policies
- Ability to collaborate across technical, policy, and operational teams
- Skills in stakeholder engagement and facilitating legal onboarding processes.
- Understanding of SME-specific challenges in regulatory and compliance environments
- Meeting facilitation expertise for Working Group leaders and AG co-chairs (full AG co-chair role description here)

AG4: Communications and engagement

Purpose

This group addresses the communication of the benefits and value case of Perseus, and driving behavioural change to encourage uptake. The outputs of this group are intended to create awareness, engagement and impact with stakeholders.

In Q1 and Q2, AG4 will:

- develop tailored messaging and communication strategies to highlight the advantages of the Scheme for different user groups.
- engage with Advisory Group members' organisations and conduct broader communications to build awareness and impact with stakeholders
- detail a 2025 communications plan
- Kick off a communications and engagement working group
- collection of evidence showcasing successes from the Perseus Pilot

In Q2 and Q3, AG4 will:

- showcase successes from the Perseus Pilot
- Develop communications materials as needed for key stakeholder groups
- contribute to the 2025 report by presenting stakeholder engagement outcomes and success stories to support broader Scheme adoption.

Outputs:

- Messaging and communication of the benefits for different user groups
- Engagement with Advisory Group members' organisations
- Open Engagement through broader consultation with the industry
- A detailed 2025 communications plan
- Establish SME communications/engagement working group
- Collect and present evidence of concrete Perseus successes in Pilot
- Contribute to the 2025 report
- AG4 co-chair reports progress, key decisions and risks to the Steering Group

Recommended skills and expertise:

- Communications professionals specialising in the sector(s) relevant to the programme
- Understanding how to digest and articulate user benefits
- Experience in developing communications plans
- Meeting facilitation expertise for Working Group leaders and AG co-chairs (full AG co-chair role description here)

AG5: Policy

Purpose:

AG5 focuses on developing and refining policies that meet regulatory requirements and align with established standards, such as the Partnership for Carbon Accounting Financials (PCAF). It prioritises creating internal policies for Financial Service Providers (FSPs), Carbon Accounting Platforms (CAPs), and Energy Data Providers (EDPs), ensuring

compliance with regulations while protecting the interests of SME beneficiaries. AG5 also supports data governance and promotes ethical data usage practices across the Scheme.

During Q1 and Q2, AG5 will:

- ensure the Scheme's policies and guidance is aligned with establishing internal policies for Financial Service Providers (FSPs), Carbon Accounting Platforms (CAPs), and Energy Data Providers (EDPs).
- validate and refine the Assurability framework based on Pilot feedback
- Statements and guidance will be harmonised and aim to be agreed across Perseus Members, while highlighting protection of the interests of the SME beneficiaries. This includes creating clear policy statements that support both data governance and ethical data usage practices.

In Q3, AG5 will focus on:

- collaborating with other AGs, particularly AG3, to ensure alignment between policy frameworks and legal requirements. This will help verify that the policies developed are practical for implementation, and effective in safeguarding SME rights
- engage with stakeholders to identify specific compliance challenges faced by FSPs, CAPs, and EDPs and provide solutions to address these
- establish monitoring mechanisms to track policy adherence and ensure ongoing alignment with evolving regulatory standards

By Q4, AG5 will aim to present a comprehensive policy framework ready for production launch, supporting a seamless transition to a fully operational Scheme.

Outputs:

- Policy statements aligned with regulatory requirements and standards such as the Partnership for Carbon Accounting Financials (PCAF)
- Harmonised policy guidance across Perseus Members, prioritising SME protection
- Comprehensive internal policy frameworks for FSPs, CAPs, and EDPs, addressing compliance and governance
- Collaboration with AG3 to align policy frameworks with legal requirements and address practical implementation challenges
- Stakeholder engagement initiatives to identify and resolve compliance challenges
- Monitoring mechanisms to track policy adherence and ensure alignment with evolving regulations
- Contributions to the 2025 report, including insights on policy refinements and groundwork for future use cases like Perseus-B
- AG5 co-chair reports progress, key decisions and risks to the Steering Group

Recommended skills and expertise:

- In-depth knowledge of regulatory frameworks and compliance requirements, including GDPR and financial data regulations

- Experience with aligning organisational policies with international standards like the Partnership for Carbon Accounting Financials (PCAF)
- Expertise in developing internal policy frameworks for data governance and ethical data practices
- Skills in stakeholder engagement and resolving compliance-related challenges.
- Familiarity with monitoring and evaluation mechanisms for policy adherence
- Ability to collaborate effectively with legal, technical, and operational teams to ensure cohesive policy implementation
- Meeting facilitation expertise for Working Group leaders and AG co-chairs (full AG co-chair role description here)