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# PERSEUS

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## 2025 Report Supporting Documents

Version: v2026-01-22

Document: IB1-PERSEUS-2025-SUPPORTING-DOCS



[ib1.org/perseus](https://ib1.org/perseus)

# Supporting Documents

<b>1. The Perseus Scheme -</b>	<b>4</b>
1.1. What is a Scheme and how do Schemes work?	4
1.2. What is the Perseus Scheme?	5
1.3. How has the Perseus Scheme evolved?	6
<b>2. Pilot learnings</b>	<b>7</b>
2.1. Key findings	8
<b>3. Permission flows</b>	<b>8</b>
3.1. FSP known at the outset - one permission	9
3.2. FSP left as a later choice - separate permissions	12
Permission 1 - Retrieve and process consumption data	12
Permission 2 - Generate emissions report for FSP	14
<b>4. Technical development</b>	<b>15</b>
4.1. Launched Production & Sandbox environments	15
4.2. Agreed technical and legal updates to extend to gas	16
4.3. Developed mechanisms for permission withdrawal and notifications	16
4.4. Refined general-purpose Trust Services	17
4.5. Mapped Perseus report fields to XBRL [todo]	17
4.6. Simplified adoption by agreeing standard public web security specifications	18
4.7. Identified risks and mitigations	18
<b>5. Gas methodology paper</b>	<b>19</b>
<b>6. Sample emissions report</b>	<b>19</b>
<b>7. Governance decisions</b>	<b>19</b>
<b>8. Schematics appendix</b>	<b>22</b>

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## Audiences

This report details the Perseus Project, its guiding values, and practical use cases. It also details the approach to data protection and governance, and provides context through research, development and collaboration. Information on specific elements of Perseus, the pilot, the sandbox, policy considerations and technical information are summarised, supported by linked detailed reports.

Its primary audience are decision-makers and their advisors who wish to understand how to **implement** change, using multi-sector collaboration and a joined-up, systemic approach to de-risk investment.

This includes, but is not limited to, banks, policy makers, regulators, trade associations and commercial practitioners working on sustainable finance, corporate reporting, finance, carbon reporting solutions and supporting SMEs. Many of the principles and lessons herein are applicable beyond the scope described.



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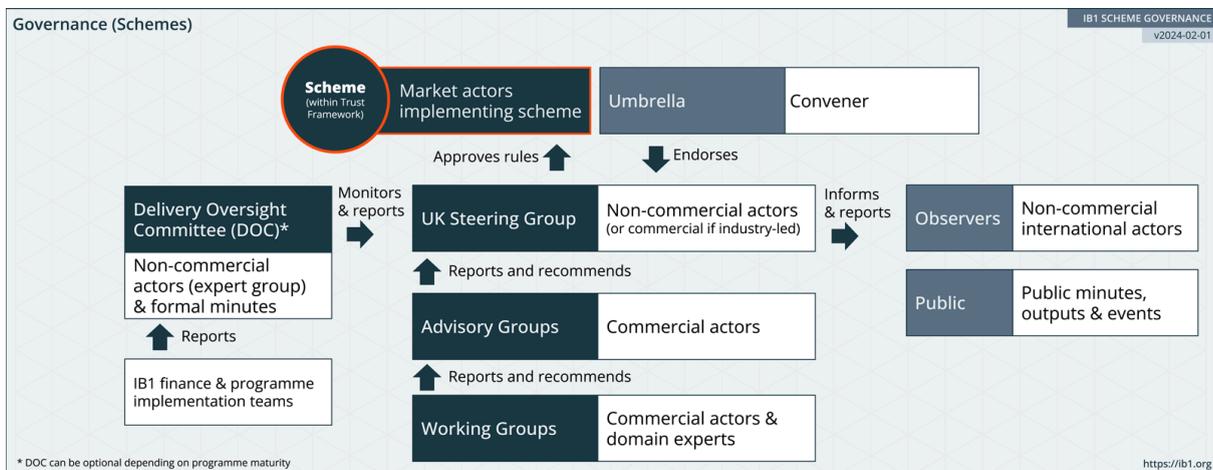
# 1. The Perseus Scheme -

## 1.1. What is a Scheme and how do Schemes work?

Schemes are the rulebooks of how organisations can share data. They define what can be shared, why, by whom, how, and what protections exist. IB1 facilitates their co-design using its [Icebreaking](#) process<sup>2</sup>. A Scheme within the context of [Trust Frameworks](#) at Icebreaker One (IB1) refers to a multilateral contract which has been co-designed by market participants through a structured program, such as Perseus. Scheme rulebooks are openly published and openly licensed, including technical, operational, and legal specifications. Schemes are composed of several core elements.

### Governance structure<sup>3</sup>:

Icebreaking convenes stakeholders via a structure of five advisory groups (AG1: purpose and user needs, AG2: Technical implementation, AG3: legal and licensing, AG4: communications and engagement, AG5: policy). A Steering Group oversees the Advisory Groups. Scheme rules are created via the governance structure, ensuring that their development is transparent, collaborative, and participatory. Once Schemes are established, change management processes are also facilitated via the governance structure ensuring that Scheme members retain an active voice in any changes.



### Trust Framework:

All Schemes operate under the umbrella of a Trust Framework. Trust Frameworks enable the continuous verification of organisations, and their APIs, so that Members can connect and share data in a secure, reliable and ongoing manner<sup>4</sup>.

### Scheme Agreement:

<sup>2</sup> Icebreaker One, Definition: Scheme <https://ib1.org/definitions/scheme>

<sup>3</sup> Icebreaker One, Scheme Governance, <https://ib1.org/sops/governance-schemes/>

<sup>4</sup> Icebreaker One, Trust Services, <https://ib1.org/join/trust-services/>

Members of the Scheme must sign, and adhere to, a multilateral contract which establishes definitions, roles, and responsibilities among Scheme members and the implementing body (e.g. Icebreaker One, a Special Purpose Vehicle, or other body). While certain elements of the Scheme Agreement may differ slightly depending on the particularities of each Scheme, the Agreement generally establishes common terms regarding the following: 1) vocabulary and definitions, 2) scheme purpose, 3) legal jurisdiction, 4) governance, 5) membership and roles, 6) data rights, licensing and data protection (where applicable), 7) technical requirements, 8) fees and payment terms, 8) general terms including confidentiality, intellectual property rights, monitoring and reporting, dispute resolution, compliance, liability and indemnification, and audit.

Where applicable, the Scheme Agreement may refer to technical items and policies located in the Registry (see below).

**Registry:**

A Registry<sup>5</sup> is the authoritative, machine- and human-readable record of the rules and specifications that define and govern a Trust Framework and the Schemes within it.

**Directory:**

A Directory<sup>6</sup> is the authoritative record of Trust Framework participants, their Scheme memberships, and their roles, responsibilities and capabilities within Schemes. It is maintained in accordance with the rules and specifications defined in the associated Registry. Directory information is provided in both machine- and human-readable formats such as RDF, Turtle, JSON or HTML for various purposes as required for the Trust Framework.

## 1.2. What is the Perseus Scheme?

The Perseus Scheme<sup>7</sup> follows the structure outlined above. It operates within the Icebreaker One Core Trust Framework<sup>8</sup>. Perseus focuses on one core purpose: automating emissions reporting to unlock green finance for SMEs. To do this, it facilitates trusted, standardised, permissioned and secure data sharing across sectors, starting with the transfer of 30 minute energy data. This data is used to produce automated, accurate and assurable carbon emissions reporting for UK SMEs which meets and exceeds best practice set by current reporting standards such as the GHG Protocol. Financial service providers (FSPs), beginning with Banks and Lenders, can then use the assurable emissions reports to assess SMEs eligibility for, and de-risk, sustainability-linked loans, green bonds, and other financing products tied to environmental performance.

By enabling technical and legal interoperability between Scheme members, Perseus enables SMEs to minimise their manual effort in measuring and reporting their GHG footprint, and matching their profile to green finance.

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<sup>5</sup> <https://ib1.org/definitions/registry/>

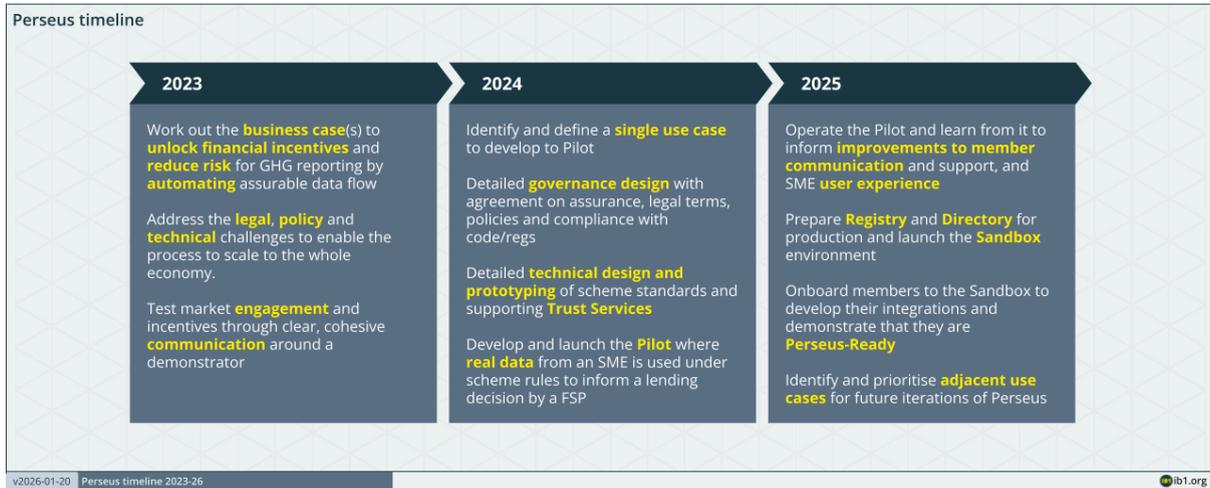
<sup>6</sup> <https://ib1.org/definitions/directory/>

<sup>7</sup> Icebreaker One, Perseus Scheme, <https://ib1.org/perseus/>

<sup>8</sup> Icebreaker One, Core Trust Framework, <https://ib1.org/tf/ctf/>

By establishing a collaborative and open rulebook for data sharing, Perseus is actively addressing a key challenge concerning data interoperability, both in the process of reporting emissions data and in connecting that data to the financial sector.

### 1.3. How has the Perseus Scheme evolved?



#### *Perseus timeline 2023-25*

2026 will focus on scaling adoption with new members which will optimise the overall costs for all.

To address more industry use cases, gas data will be integrated into Perseus. This will allow FSPs to apply Perseus to more financial products and deploy more capital. I will also empower CAPs to offer more comprehensive, personalised interventions and recommendations for SME decarbonisation across energy vectors. For SMEs, this represents larger opportunities for direct energy and cost savings, improved consideration of the interactions between power and gas (e.g. supporting electrification of heat), and access to a wider range of finance.

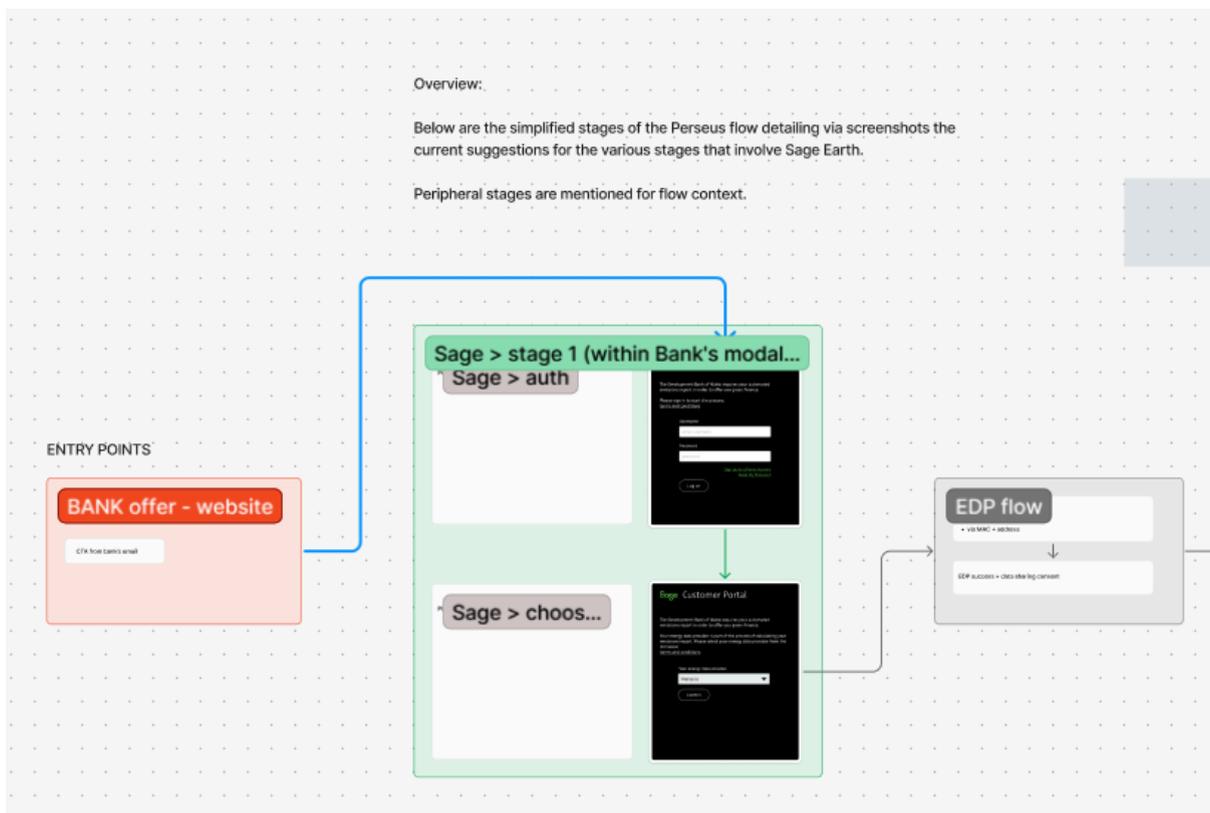
Engaging with Perseus will be made easier with automation and streamlined onboarding, and strengthened interoperability with the CCS (overseen by RECCo). Interoperability with XBRL will also increase Perseus' impact by allowing data to be openly discoverable and machine-readable.

As a larger number of 'Perseus-ready' solutions come online throughout 2026, an open, competitive, and transparent marketplace will be established allow lenders to access Perseus data as well as additional insights relevant to their finance use cases, whether those relate to real estate finance, sustainability-linked loans, cash-flow financing, or other financial products.

## 2. Pilot learnings

Over a six-month period, the technical, legal, and user experience (UX) aspects of Perseus were tested. The pilot assessed multiple elements of Perseus, including:

- Technical, legal, and contractual elements to ensure data integrity, compliance, and trust between parties.
- [Onboarding materials and guidance documents](#) to evaluate whether instructions and support materials were clear, comprehensive, and appropriately targeted.
- Assured and secure data flow between an energy data provider (EDP) and a carbon accounting provider (CAP) to produce a secure, assured emissions report for the SME to share with a financial service provider (FSP).
- User journey mapping to test the practicality, branding flexibility, and integration of Perseus processes within participants' existing digital environments.



*An example user flow*

## 2.1. Key findings

Key finding	Summary
<p><b>1. UX design.</b></p>	<ul style="list-style-type: none"> <li>• Users are confused by having two permissions - one for the CAP to process consumption data and one for releasing emissions reports to the FSP (see 3. Permissions Flows below)</li> <li>• Users require more support and guidance through their Perseus journey.</li> <li>• Implement visual clues such as progress indicators, contextual help, and simplified onboarding interfaces.</li> </ul>
<p><b>2. Greater clarity of stakeholder roles needed.</b></p>	<ul style="list-style-type: none"> <li>• Clearly highlight the elements of the Perseus journey hosted by the FPS, the CAP &amp; the EDP.</li> </ul>
<p><b>3. Lack of engagement is a challenge.</b></p>	<ul style="list-style-type: none"> <li>• Stakeholder engagement with the pilot was limited.</li> <li>• Stakeholders did not put their own SME clients forward for user testing.</li> <li>• To mitigate, we reached out to other stakeholders in the wider ecosystem to understand their barriers to participation and engagement and how to overcome these.</li> </ul>
<p><b>4. Increased support, guidance and documentation for onboarding.</b></p>	<ul style="list-style-type: none"> <li>• While the initial onboarding documentation was effective, many participants sought additional clarity, walkthroughs, and visual aids.</li> <li>• Perseus has since expanded its materials to include detailed step-by-step guidance, FAQs, and readiness checklists to support organisations of varying technical maturity.</li> </ul>
<p><b>5. Adapted technical design to increase ease of adoption.</b></p>	<ul style="list-style-type: none"> <li>• Cloud-hosted organisations experienced difficulties with private server certificates, highlighting the need for greater flexibility.</li> <li>• Technical requirements have now been updated to align with standard practices using public certificate authorities, simplifying compliance and integration.</li> </ul>
<p><b>6. Trust and clarity in legal, compliance, and data retention.</b></p>	<ul style="list-style-type: none"> <li>• Legal teams appreciated the clarity of limited-term pilot agreements and time-bound data retention. These short-term parameters built confidence in the framework and will inform the design of future contractual models that balance assurance with operational flexibility.</li> <li>• The clarity of definition that the scheme provided proved vital in helping different actors understand their roles and responsibilities.</li> </ul>

## 3. Permission flows

As noted above, some Pilot users were confused by being presented with two permissions: one enabling the CAP to retrieve and process consumption data, and a second allowing them to generate an emissions report for a specific FSP. Advisory Group 3 (Legal) determined that for the case where the FSP is known at the time permission is sought, a single permission step covering both elements of the processing would be sufficient.

The Perseus scheme agreement, policies, licences and permission text were updated to support two flows:

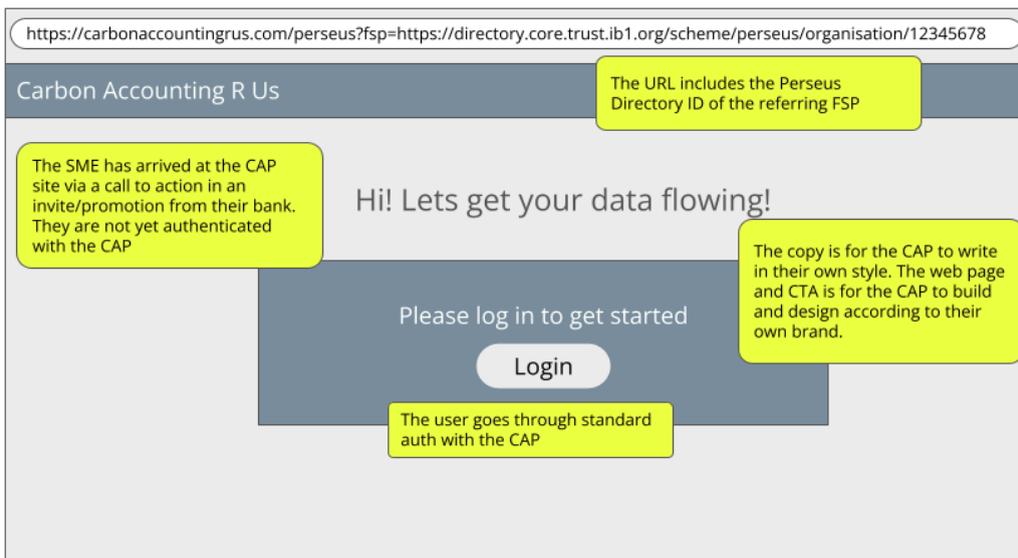
1. FSP known at the outset - one permission
2. FSP left as a later choice - separate permissions

Sections 3.1 and 3.2 illustrate the two flows with notes on what is displayed. Sequence diagrams showing the transition between CAP and ESP are available at <https://github.com/icebreakerone/perseus-sequence-diagrams>

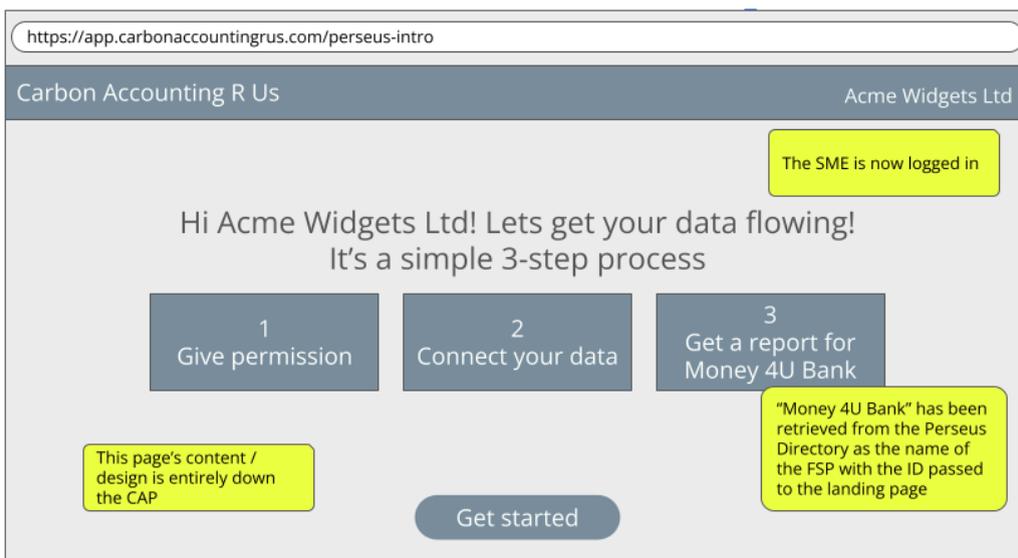
### 3.1. FSP known at the outset - one permission

In this example, the FSP ID is passed to a public web page hosted by the CAP via a URL parameter. If the FSP for the SME is already known by the CAP, the flow can start for a logged-in user at the second screen

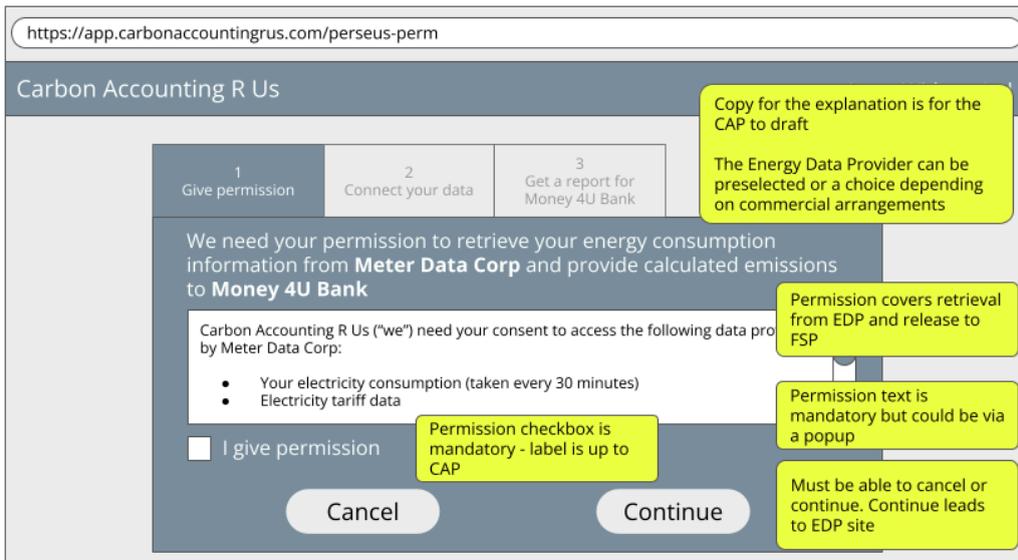
#### Introductory landing page



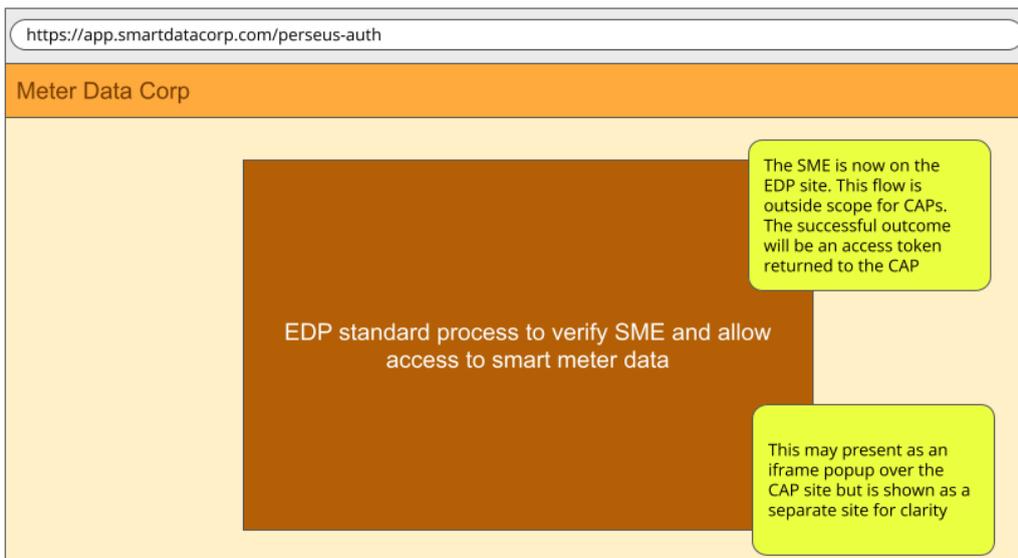
#### Logged-in process start page



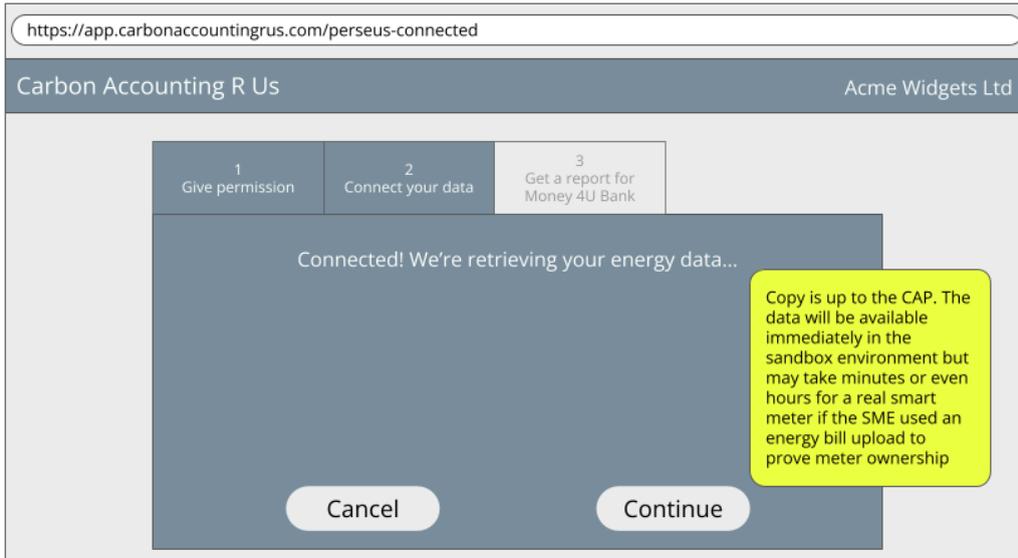
### Single permission screen



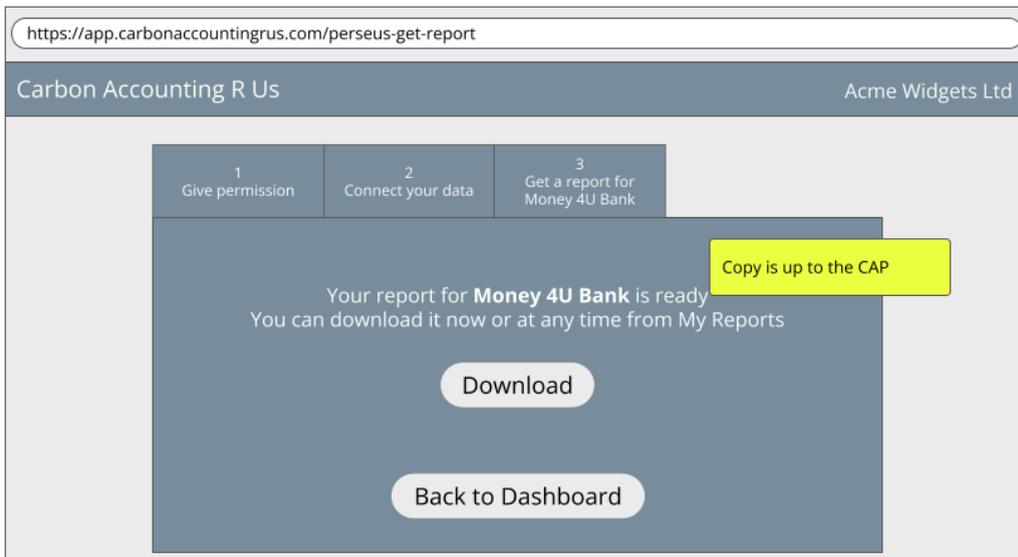
### EDP smart meter ownership proof



### Connection made



### Report generated

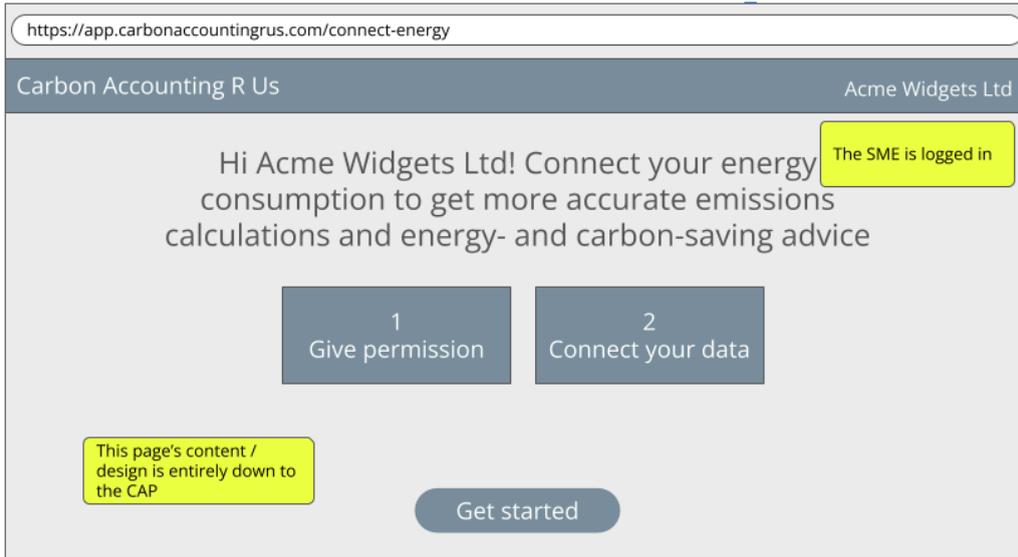


### 3.2. FSP left as a later choice - separate permissions

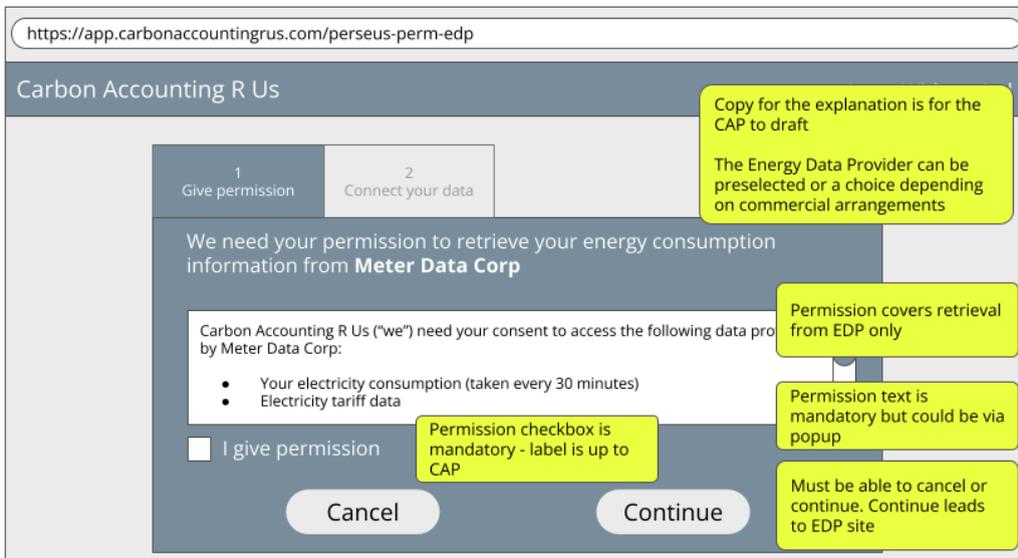
This approach allows the CAP to connect to an EDP to retrieve consumption information in advance of knowing which FSP(s) the emissions data reports will be generated for.

#### Permission 1 - Retrieve and process consumption data

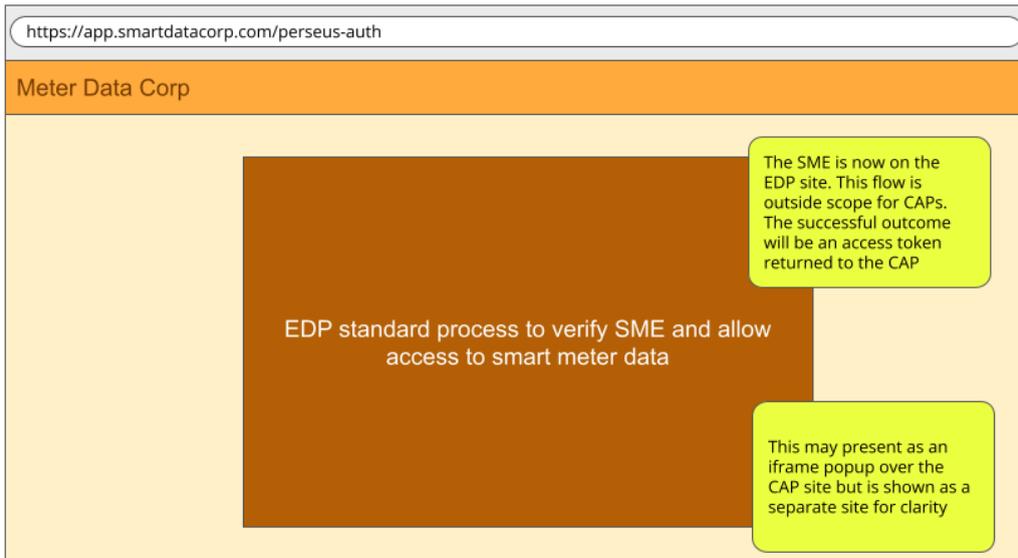
##### Logged-in process start page



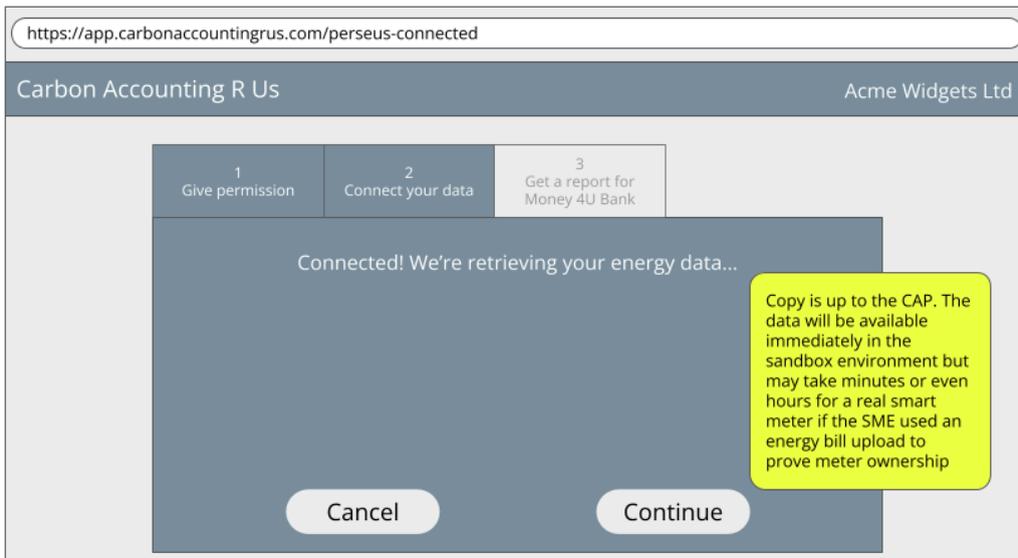
##### Permission to retrieve and process data from the EDP



### EDP smart meter ownership proof

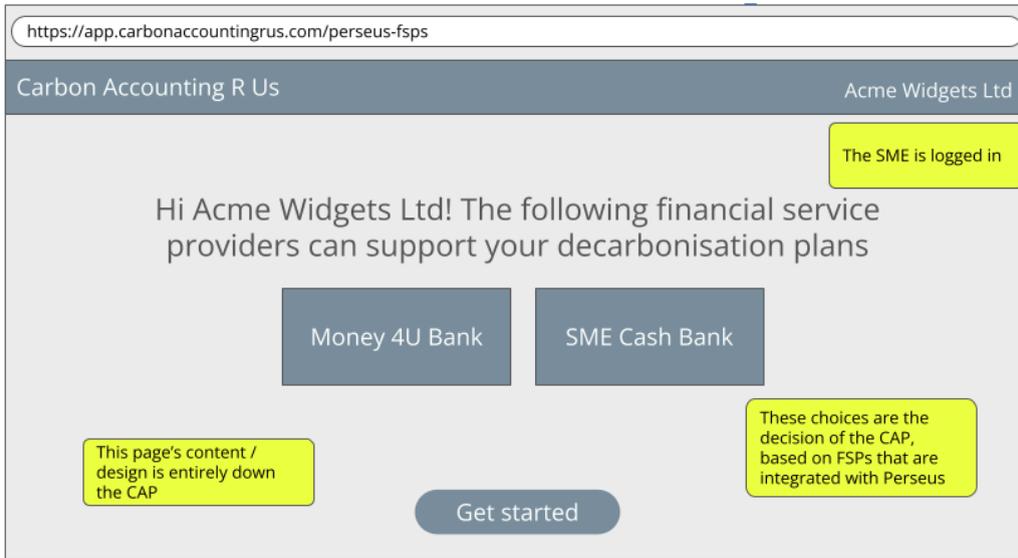


### Connection made

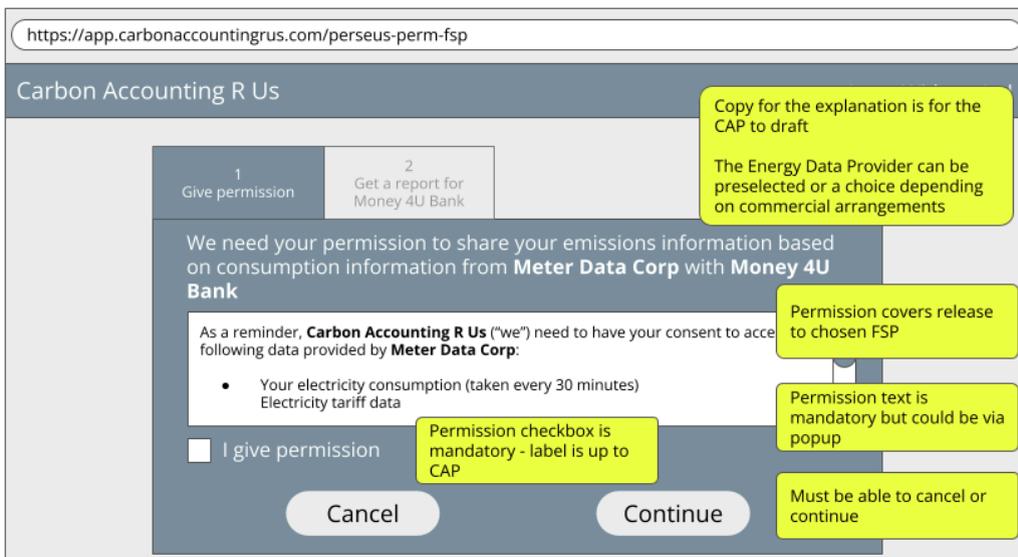


## Permission 2 - Generate emissions report for FSP

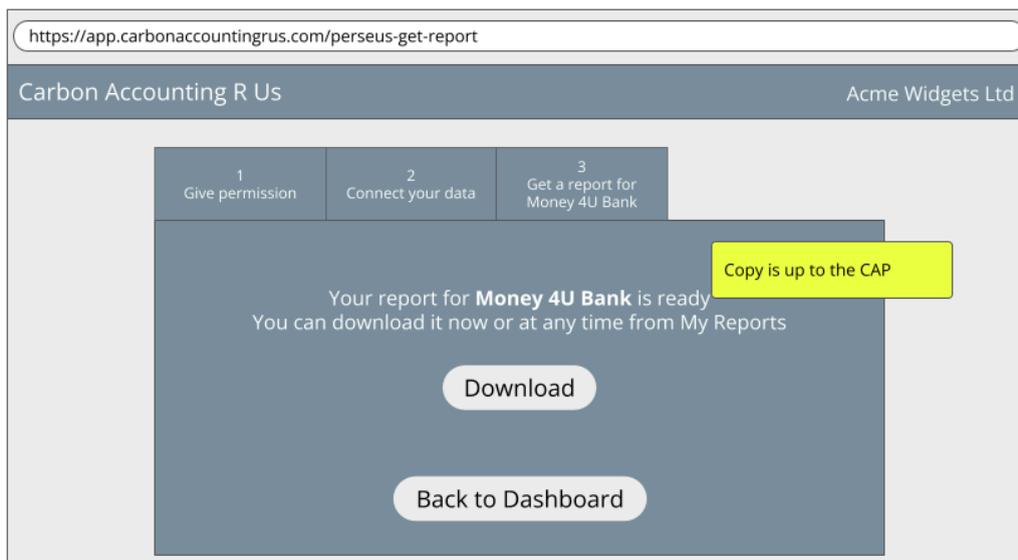
### FSP offer screen



### Permission to generate a report and release it to a specific FSP



## Report generated



## 4. Technical development

Technical development in 2025 progressed through two phases: first, the Pilot phase refined documentation, trust services, and specifications based on participant feedback; second, the production phase focused on service architecture, security, and launch readiness, informed by member workshops and Advisory Group reviews.

This work led to seven key outcomes:

### 4.1. Launched Production & Sandbox environments

Trust Services for the Perseus Sandbox environment launched in September. These include sandbox versions of the Registry, Directory, Member Portal, status dashboard, onboarding documentation and example apps. The sandbox environment is functionally identical to production, except that all the data is synthetic. It is designed to help members develop and test their integration without any data protection concerns.

IB1 Core (sandbox) Trust Framework	
<b>Perse (sandbox)</b> Code: o9ksi1sd Contact: controller@perse.io Registered Address: Spaces, Winsley Street, England, Greater London, London, W1W 8HF, GB	Valid until: 2026-10-30 <b>Scheme Memberships</b> 
<b>Quantaco Ltd</b> Code: nwjoo2p0 Contact: info@quantaco.ai Registered Address: 17 Hanover Square, London, Greater London, London, W1S 1BN, GB	Valid until: 2025-10-28 <b>Scheme Memberships</b> 
<b>Tese Capital (UK) Limited</b> Code: wah033vf Contact: info@tese.io	Valid until: 2026-11-12 <b>Scheme Memberships</b> 

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#### Perseus Sandbox Directory

Perseus in production provides the same services but with higher availability & performance, increased security, especially on build and deployment, and enhanced monitoring.

#### 4.2. Agreed technical and legal updates to extend to gas

Perseus will implement gas consumption in 2026. The technical and legal updates to support the extension to gas are minor, and have been agreed. The methodology approved is:

The sum of the products of the half-hourly consumption in cubic meters and the most recent published greenhouse gas conversion factor from the UK Government for Natural Gas covering the time of consumption.

A full report on the changes to support gas consumption is [here](#)

#### 4.3. Developed mechanisms for permission withdrawal and notifications

Perseus permission requires that SMEs are able to withdraw permission from either the data provider or the data consumer of data they have permitted. Withdrawal of permission must end processing by both sides as soon as possible afterwards. The OAuth standard provides a mechanism for data consumers to notify data providers that the permission has been withdrawn ([RFC7009](#)). There

is not a corresponding mechanism for providers to notify data consumers relying on the permission.

Foreseeing a general need for data providers to signal changes in status asynchronously to data consumers, Perseus has adopted a flexible message-based architecture for notifications to data consumers. This includes a message for withdrawal of consent.

This approach has now been [published as a specification](#) and adopted by the Perseus Scheme.

#### 4.4. Refined general-purpose Trust Services

Informed by the needs of Perseus, IB1 has further refined its work on the standard [Trust Services](#) required to fully document and operate data sharing schemes:

- Specifications - Reusable atomic definitions for technical, legal and procedural elements of schemes, that are incorporated as-needed into individual scheme Registries - the rulebooks for the schemes
- General-purpose Registry representations of all the types of rules developed for Perseus: agreements, policies, licences, member roles, assurance, data and API standards. These are documented as [specifications](#).
- Governance, change management and versioning approach for rules
- Production Registry published:  
<https://registry.core.trust.ib1.org/scheme/perseus>
- Openly-published Directory of scheme members, their roles and data services
- A secure Member Portal for members to manage their Directory entries, including a Private Certificate Authority to issue client and signing certificates used in access control and secure data sharing

Standardising Trust Services has enabled the rapid technical implementation and iteration of Perseus, and built a library of open-source components that are available for re-use by any data sharing scheme.

#### 4.5. Mapped Perseus report fields to XBRL

XBRL (Extensible Business Reporting Language) is the standard for exchanging financial data. Perseus reporting data can be represented in XBRL, allowing it to be submitted to financial institutions as well as other entities such as Companies House and the Bank of England. This enables the flow of emissions data into statutory accounts and other filings without manual reformatting..

Assuming a CAP has collected the emissions data necessary to prepare a Perseus report for a FSP, here is a brief description of how they may generate a basic submittable XBRL document, called an 'instance' in XBRL terminology.

*Note that this does not yet include details of Perseus assurance and provenance data, which are yet to be finalised for representation in XBRL.*

This is based on the top portion of [this example report](#), and specifically the [JSON document](#) that contains the data for it. We use the JSON representation as it is simpler and easier to process, while still containing all the salient information for reporting.

The document begins with a standard preamble that defines namespaces that will be used later, and also declares features for how the document should be validated.

*(Note that there is a requirement by at least the Bank of England to avoid duplicate facts, even where the duplicates are identical, so it may also be worth including "xbrl:allowedDuplicates": "none" in the features section to override XBRL-JSON's more permissive default.)*

The key section of the JSON is the facts portion, where all the data, including information about the business entities involved, is presented.

Every entry in facts has a unique key within the report document that you must provide, and a value that is an object with the following structure:

- a value that is the value of the fact, such as a number or a piece of text
- only for numeric values, an integer decimals value that defines what the significant part of the number is:
  - decimals greater than zero are the number of significant decimal places
  - decimals of exactly zero means treat the value as an integer
  - decimals of less than zero means how many digits before the decimal are to be rounded away for reporting or comparison purposes
- a dimensions object that contains all the information necessary to put the value in context, represented as key-value pairs:
  - a concept that identifies how to interpret the value
  - a period that describes what duration or instant in time the value is valid for
    - whether the period represents a duration or an instant is part of the definition of the concept
  - an entity that identifies the associated entity – in our example, the reporting entity, identified by its Companies House number
  - where the value relates to another value, there may be an explicitly namespaced key whose value identifies the relationship, such as the 'business:EntityContactTypeDimension' key with value 'business:PrincipalPlaceBusiness' for address values

- a `unit` that specifies the units for the `value` – this must match the corresponding `unitId` taken from the [Unit Type Registry \(UTR\)](#)

Giving every fact a unique key within the document is a requirement of the XBRL JSON specification, but the keys can be anything that makes sense to you, as long as they don't repeat within this document. In the example, they are simply named "f1", "f2",... and so on.

The specifications associated with the namespaces, the expected facts as described above, and the sources of data within Perseus referred to above, are summarised in [this sheet](#).

For full details on XBRL and its related standards and processes, see their [web site](#).

#### 4.6. Simplified adoption by agreeing standard public web security specifications

As mentioned in the Pilot section, members whose servers are hosted by cloud providers had difficulty using private server certificates, so the Perseus team undertook a re-evaluation of that element of the Pilot technical specification. Any change required careful review, as the specification was based on the approach taken by Open Banking. The proposed solution was to use Public CAs (normal public web security) for servers, and for clients to ensure that the URL providing the service matches the URL published in the Directory, and it is provided using a non-wildcard TLS certificate.

The Technical Advisory Group determined that relying on the Directory for proof of a valid member application domain, rather than relying on a certificate issued by the Member Portal, was functionally equivalent, and agreed to make the change to help simplify implementation for members. This approach has now been [published as a specification](#) and adopted by the Perseus Scheme

#### 4.7. Identified risks and mitigations

To ensure that the Perseus infrastructure operates to high security standards and maintains the trust of all participating organisations, Icebreaker One undertook a risk assessment of the Perseus production Trust Services, using the [NCSC basic risk assessment methodology](#). The risk assessment was further refined following feedback from Advisory Group 2 (AG2 - Technical) members and the National Protective Security Agency ([NPSA](#)). The assessment and mitigation approach has been approved by AG2 and is available to scheme members.

## 5. Gas methodology paper

[Available here](#)

## 6. Sample emissions report

[Available here](#)

## 7. Governance decisions

The Perseus Steering Group (SG) includes major trade associations that represent stakeholders, UK Government and international observers. The SG reviews and endorses the recommendations of the Advisory Groups (AGs). It plays a critical role in engagement, dissemination, and fostering trust in decision-making. With support from the Institute of Directors (IoD), the major update included adding a Delivery Oversight Committee (composed of the Institute of Directors, ICAEW, UK Finance and British Business Bank) in 2025. A standard Terms of Reference<sup>9</sup> for all participants has also been implemented.

Commercial businesses and non-profits contribute to the co-creation of data sharing rules through Advisory Groups (AGs), with each AG containing Working Groups (WGs) to address specific questions or issues. Advisory groups lead the definition of direction, scope, oversight and adoption of recommendations (including those delivered by Working Groups, as appropriate). They address the five pillars of data governance: User needs; Tech; Legal and Licensing; Communication and Engagement; Policy.

### Steering Group key decisions:

- The shift from financing green to greening finance continues to be the correct framing for 2026 as it broadens the scope beyond green-linked loans to all relevant financial products and services, and better aligns with shifts in language such as productivity, resilience, efficiency and cost reduction.

SG published minutes:

- [Perseus Steering Group Summary Minutes February 2025](#)
- [Perseus Steering Group Summary Minutes June 2025](#)
- [Perseus Steering Group Summary Minutes August 2025](#)
- [Perseus Steering Group Summary Minutes November 2025](#)

### Advisory Group 1 key decisions:

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<sup>9</sup> Icebreaker One, Scheme Advisory Groups: Terms of Reference (ToR) <https://ib1.org/terms/tor>

- Gas will be the data type Perseus should prioritise next, with waste generation as the second chosen option.
- Sustainability Linked-Loans (SLL) and use of proceeds are the product focuses prioritised for investigation.
- Members would be happy to supply UK Finance (or similar) with information (anonymised if required) to help them estimate the Total Addressable Market.
- Supported the Perseus Steering Group (and Delivery Oversight Committee) to approach/discuss tax incentive approaches with HM Treasury.
- Agreed with the long-term vision to transition to “Greening Finance” as a more expansive approach encompassing all business accounts rather than “Financing Green” focusing only on green lending.
- Focus on priority intersection: high emitters + data-ready + under pressure to report now

AG1 published minutes:

- [Perseus Advisory Group 1 \(User Needs & Impact\) Summary Minutes May 2025](#)
- [Perseus Advisory Group 1 \(User Needs & Impact\) Summary Minutes July 2025](#)
- [Perseus Advisory Group 1 \(User Needs & Impact\) Summary Minutes October 2025](#)

#### **Advisory Group 2 key decisions:**

- Gas methodology approval will require a simple legal change—adding “and gas” to permission text—and that the selected technical approach uses half-hourly gas consumption data with government annual emissions factors.
- Approval of [data specifications for gas consumption and emissions calculation](#)

AG2 published minutes:

- [Perseus Advisory Group 2 \(Technical Infrastructure\) Minutes February 2025](#)
- [Perseus Advisory Group 2 \(Technical Infrastructure\) Minutes May 2025](#)
- [Perseus Advisory Group 2 \(Technical Infrastructure\) Minutes July 2025](#)
- [Perseus Advisory Group 2 \(Technical Infrastructure\) Minutes October 2025](#)

#### **Advisory Group 4 key decisions:**

- 2025 communications priorities would be
  - continue to communicate a clear, positive and value-based story about Perseus.
  - lay the foundations for SME engagement.
- a new SME communications and engagement Working Group will be established, aimed at developing core messaging and communications recommendations to help SMEs build trust in Perseus.
- There are 4 actions recommended to the AG for external buy in, and that these recommendations would be passed up to the SG too:
  - Mention Perseus to at least one journalist contact over the next month, using the live Pilot as a hook

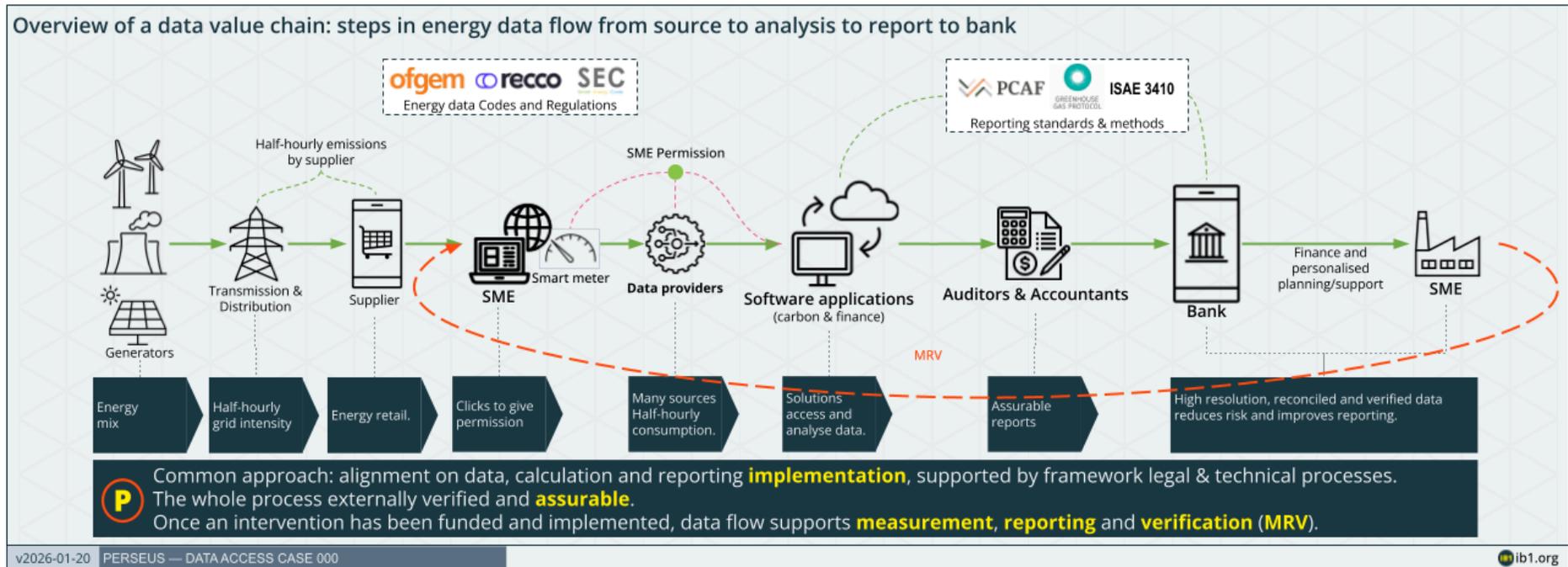
- Share news in the next month that the Development Bank of Wales is using Perseus in its loan process
- Share a piece of content on LinkedIn over the next month about why your organisation has engaged in Perseus
- Work with a senior leader to support them to share a LinkedIn post on Perseus
- a monthly content update will be shared with members for circulation – the first one this week with an update on the Willow Review
- To expand the media pack to include information on how Perseus supports different initiatives, simple product slides, a call to action to adapt for stakeholders, and adding understanding of different stakeholder perspective as a value point
- Talking points/narrative was reviewed and approved for continued use with member revisions
- To showcase the 2025 Perseus report content, IB1 will pull out short form content to highlight Perseus' users, their story and their benefits
- The communications narrative should evolve to reflect this broader ambition while keeping language pragmatic, low-cost, and focused on productivity, efficiency, and the unlocking of private-sector finance.
- Both levels of storytelling will be needed: macro to convey ambition and system impact; micro to make outcomes tangible and relatable to businesses and partners.

AG4 published minutes:

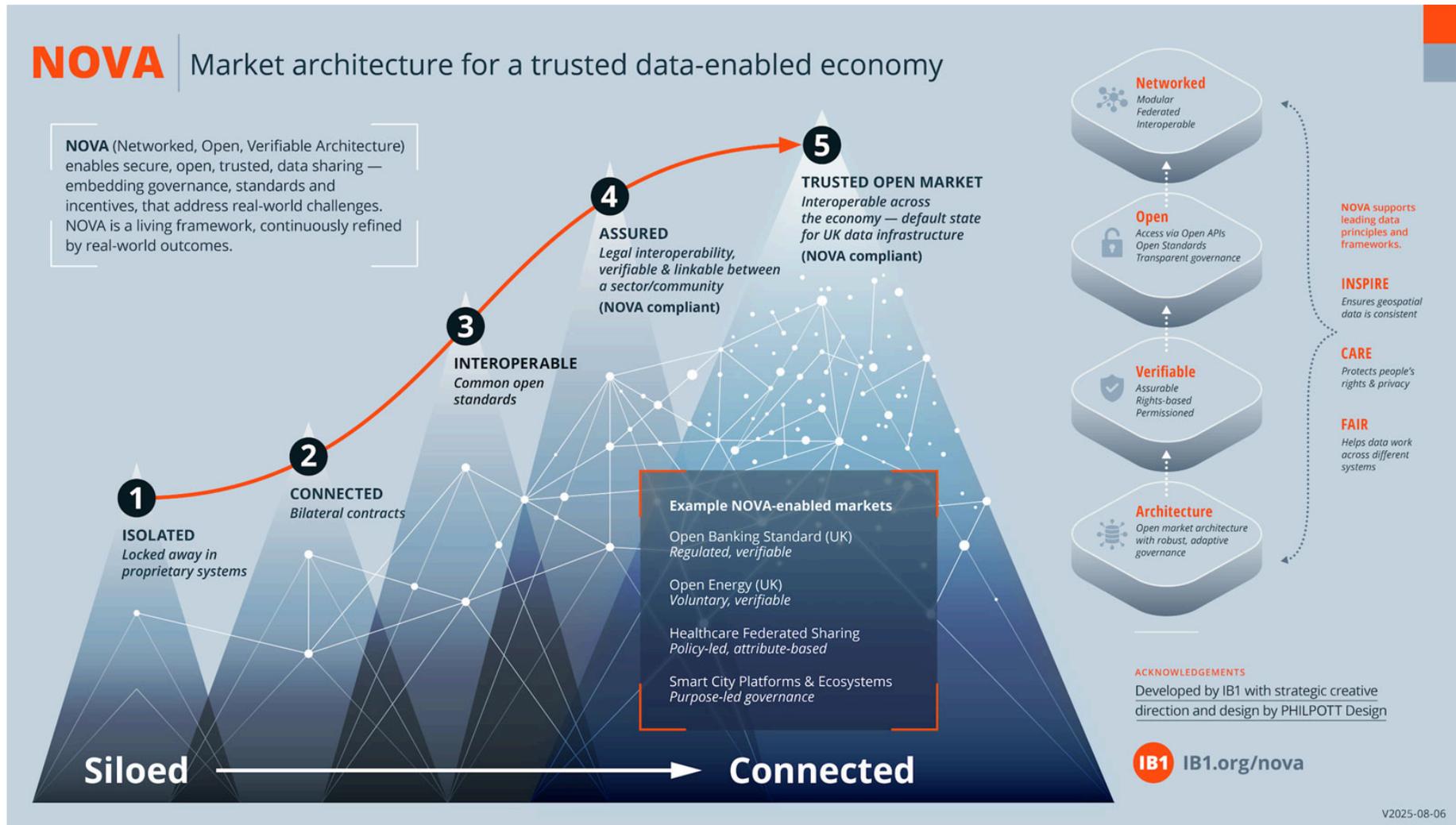
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes January 2025](#)
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes May 2025](#)
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes June 2025](#)
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes July 2025](#)
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes September 2025](#)
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes October 2025](#)
- [Perseus Advisory Group 4 \(Engagement & Communications\) Summary Minutes November 2025](#)

# 8. Schematics appendix

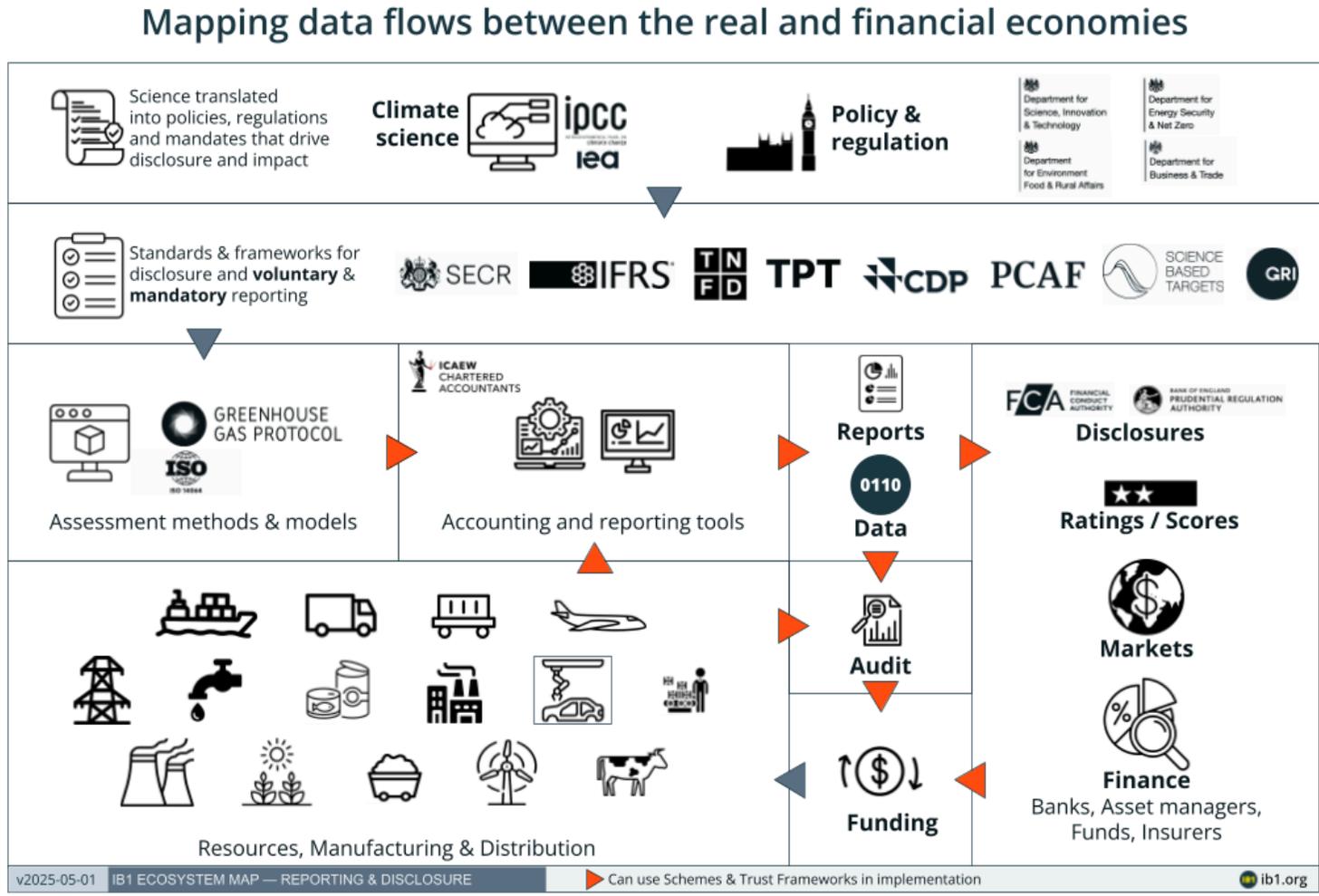
Schematic 1: overview of the Perseus use case data flow (IB1, 2025)



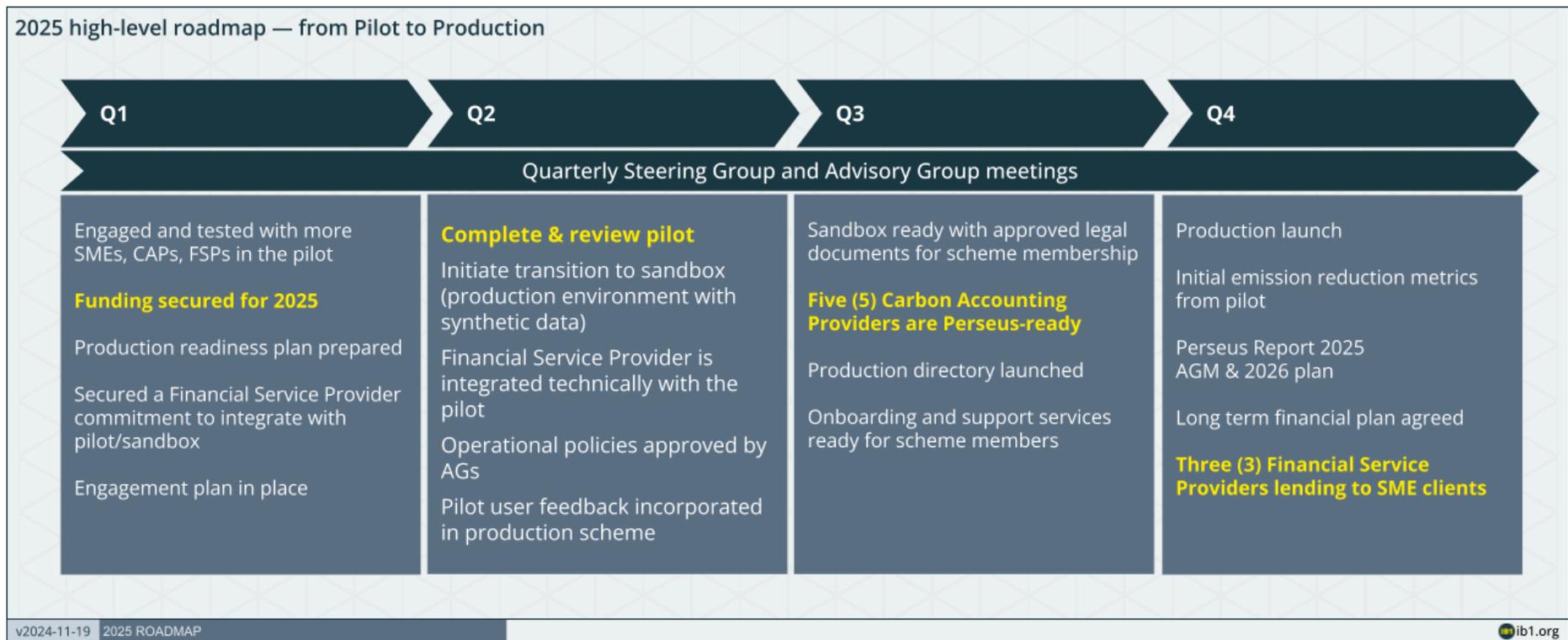
Schematic 2: NOVA principles [<http://ib1.org/nova>]



Schematic 3: Real and financial economy data flows mapping (IB1, 2025)



Schematic 4: Perseus 2025 high-level roadmap (IB1, 2025)



Schematic 5: Perseus technical architecture (IB1, 2025)

