Policy Council Meeting Agenda

August Meeting- 8/9/2023 @ 3:00 PM ET

I.	Welcome & Antitrust Guidelines	Josh Steinhardt, Operations Director
II.	Introduction	Karen Wayland, CEO
III.	Data Access Presentations	Nekabari Goka, Principal, Policy Analysis & Development | Corporate Strategy, Exelon Michael Vecchi, Director of Industry Solutions, Landis + Gyr
IV.	Questions and Discussion	All

GRIDWISE ALLIANCE

GridWise Alliance
Antitrust Compliance Program Guidelines

It is the policy of the GridWise Alliance to comply fully with the antitrust laws. The Sherman Act and other applicable antitrust laws are intended to promote vigorous and fair competition and to combat various restraints of trade.

Each person who participates in GridWise Alliance activities has a responsibility to his/her employers and to the GridWise Alliance to avoid any improper conduct from an antitrust standpoint. The following guidelines will assist in meeting this responsibility:

1. GridWise Alliance meetings and discussions generally cover topics related to the generation, transmission and distribution of electricity. Should related discussions ever have any potential for competitive impact, all due care shall be taken to avoid such discussion between competitors.

2. In view of antitrust considerations and to avoid any possible restraints on competition, the following legally sensitive subjects must be avoided during any discussion between competitors:

   (a) Future marketing plans of individual competitors should not be discussed between competitors;

   (b) Any complaints or business plans relating to specific customers, specific suppliers, specific geographic markets or specific products, should not be discussed between competitors;

   (c) Purchasing plans or bidding plans of companies in competition should not be discussed (except privately between two parties with a vertical commercial relationship such as supplier and customer); and

   (d) Current and future price information and pricing plans, bidding plans, refund or rebate plans, discount plans, credit plans, specific product costs, profit margin information and terms of sale should not be discussed between competitors. All of the above are elements of competition.

3. Any question regarding the legality of a discussion topic or business practice should be brought to the attention of the GridWise Alliance legal counsel or a company's individual legal counsel for advice.

Landis+Gyr

Data Access Issues: A Landis+Gyr Overview

Presentation for the GridWise Alliance

August 9, 2023

Foundational Terms and Issues

Ownership: Clarifying the customer as the owner of energy data.

Role of the Utility: Typically referred to as the “Custodian of the data”

Permission: Authorization to release data to third parties under standard agreements

Data access: How third parties receive what kinds of customer data

- **Authorization language**: clarified what data is shared, for how long, the purpose, and how to revoke process
- **Third party eligibility criteria:** Terms for a third party to receive data, prohibited uses, liability, etc.
  - **Data security agreement:** Contract for third parties verifying security protocol
  - **Non-disclosure agreements**: Contract for third parties verifying protection of customer info

Privacy: Protections against including personal identifying information, sharing with unauthorized parties

Data retention: How long a utility retains information (meter interval, customer number etc)

Aggregation Screens: 15/15 is the most common; requiring at least 15 customers in an aggregation with no customer contributing to more than 15% of system load

Customer experience: How the customer engages with data sharing, utility portals, etc.

Industry Status on Data Access topics

Around 2010-2016, interest in data access topics surged, resulting in a variety of research topics and resources, including:

- ACEEE's State and Local Policy Database (updated periodically)
- Colorado State University's Center on the New Energy Economy Customer Data Access State by state evaluation
- DOE's 2010 Data Access and Privacy Issues Related to Smart Grid Technologies
- DOE's 2010 Federal Smart Grid Policy: The Communications Requirements of Electric Utilities
- Joint NARUC-NASEO Task Force on Comprehensive Electricity Planning – Data Access Resources
- NRRI's 2009 and 2015 resources

Initial market attempt at standardizing the HAN…

zigbee → Wi Fi ALLIANCE™

… required a broader ecosystem to engage customers

Today, DOE is focusing on new efforts related to distribution grid and DER cybersecurity.

"Cyber Trust Mark" label for smart devices, July 2023

NIST exploring IoT security, Feb 2023

2023 White House Security Strategy and Plan discuss energy

Some NARUC initiatives look to cloud computing and grid data:

2020 and 2021 cloud computing tools (brief)

2022 Grid Data Sharing: Summary of Current State Practices

Other industry analysts are looking at the capabilities of AI, including how new grid sensors can support DERs.

IIJA Smart Grid Grants requires "that projects support data standards (e.g., Green Button Connect), interoperability, and nondiscriminatory data access on a real-time basis."

Types of Data Requests (2016)

Time interval of data: (e.g., real-time, 15-minute, daily, monthly, yearly).

Spatial granularity of data: (e.g., device-level, meter-level, building-level, census block, community-wide).

Type of customer or structure: (e.g., commercial, single-family residential, industrial).

Recipient of data: (e.g., building operators, governments, academics, vendors and service providers).

Intended use of data: (e.g., energy efficiency, community planning, academic research, marketing)

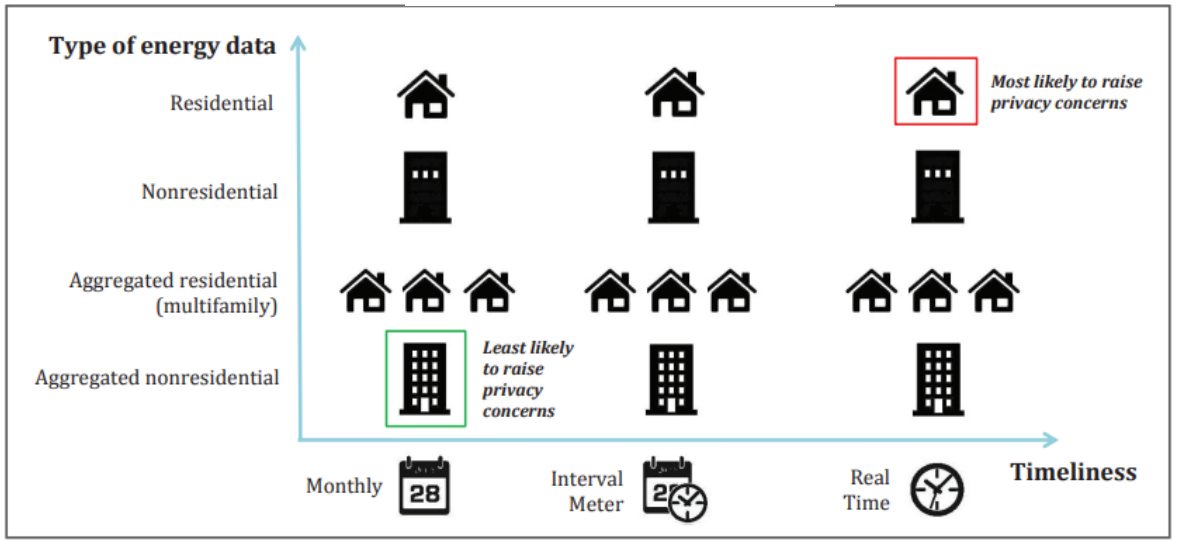

Figure 1. Utility Data Sensitivity Chart.

Changes in Data Today

Granularity, definitions, and categories are shifting with new technology

"Real-Time Data," useful is relatively undefined, depends on use case

- Granularity: Minimally 14,000 Hz / second; waveform data
- Supports consumers' ability to see, interact with device-level data
- Future use cases (transactive energy, DR, wholesale pricing)

As "**Custodians of the data**," utilities are responsible for determining what data can be released. Some utilities (e.g. Con Edison) differentiate:

- **Customer data** (customer energy usage in kWh, local generation, load profile), which can be shared, and
- **Distribution system data** (voltage, capacity, equipment, operating details), which is typically available via company portals or wholesale markets (e.g. hosting capacity maps)

Future Data Access Principles

1: **Wi-fi Security.** AMI meters should contain a Secure Wi-fi connection for Consumer Apps (esp. Wifi Alliance certificate).

2: **Data Flow and Cybersecurity.** Consumer should be able to send their Data directly to their service providers.

3: **Equitable customer experience.** All consumers should be capable of the same experience.

4: **Flexibility.** Regulatory structures should be flexible to allow for innovation, learning in real-time.

5: **Further discussions.** Longer-term working groups may be necessary to address new technology.