

Data Permissions Matrix – Conditionality Document

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1. Document Purpose

Uniform Network Code (UNC), **General Terms, Section D – CDSP and UK Link** defines the Data Permissions Matrix (DPM):

5.2.1 (g) a document prepared and managed by the CDSP which sets out the data items available to the Parties ~~by service (i.e. application programming interface/Data Enquiry Service/Telephone)~~ (the “Data Permissions Matrix”).

The purpose of the DPM is intended to define what data the CDSP is entitled to release to Parties. The DPM does not include the Portfolio DSC Core Customer (i.e. the Registered User and relevant

Network (i.e. within Network geography)), the DPM is not intended to restrict access to these parties as this data is not considered Protected Information. Specific exclusions apply – examples of which are referenced in Section 6 below.

The purpose of this Data Permissions Matrix – Conditionality Document is to provide a summary of the User types set out within the DPM and includes details such as any specific conditionality agreed by the Data Services Contract (DSC) Contract Management Committee (CoMC) to allow a User type access to data.

A section has been included to clarify what happens when a data request is made by Ofgem, noting Ofgem is not listed as a User Type on the DPM.

The DPM – Conditionality Document does form part of the DPM. For the avoidance of doubt, in the event of an inconsistency between the provisions of the DPM and the DPM – Conditionality Document, the DPM will take precedence.

The Central Data Service Provider (CDSP) will be responsible for maintaining the DPM – Conditionality Document. Any proposed changes to format of the DPM – Conditionality Document must be agreed by the DSC CoMC before being implemented. *Please see Section 2 of this document for the details around amending the document.*

The document includes the following information for the User types within the DPM:



2. Process for amending this document

In relation to content changes to the DPM – Conditionality Document, where a Disclosure Request Report is submitted and approved by DSC CoMC to allow access to data to a User type, the associated updates to DPM will be reflected in the DPM – Conditionality Document by the CDSP and published on Xoserve.com for visibility.

Please note, the Disclosure Request Report template will also include a view of the information that will be provided for that User type within the DPM – Conditionality Document ahead of being updated officially.

For structural changes to DPM – Conditionality Document, this must be approved by the CoMC.

Any DSC Party or the CDSP may propose an amendment to this document by following the process set out below:

- 1) If the amendment is proposed by a DSC Party, the proposed amendments should be shared with CDSP with sufficient time to enable CDSP to share with all CoMC Representatives prior to the CoMC where approval will be sought.
- 2) If CDSP propose the amendments, CDSP will share the amendments with CoMC in line with the Terms of Reference of the meeting where approval will be sought.
- 3) Proposed amendments to be added to the agenda for the CoMC where approval will be sought.
- 4) CoMC Representatives and CDSP to review the amendments.
- 5) Any comments relating to the amendments to be discussed at CoMC.
- 6) Approval of any amendments to be given at CoMC.
- 7) Once approved CDSP will:
 - update the document with the approved amendments;
 - update the version control on the final page of this document; and
 - arrange for the updated document to be published

The DPM – Conditionality Document shall be reviewed by the CDSP on an annual basis with the outcome being reported back the CoMC. This review should ensure that the information in the DPM aligns with that set out within the DPM – Conditionality Document, plus assess if the structure of the document is still suitable.

3. Data Permissions Matrix Portfolio / Community

Within the DPM certain user types have a Portfolio and Community view*.

- **Portfolio** – this is where a party is either **currently appointed** at the Supply Meter Point (SMP) or has **previously been appointed** at the SMP, or the SMP is within the Network geography. In order to disclose the information, the effective dates of the relevant data must indicate that the data was relevant / valid during their appointment period. E.g. a previous Shipper can receive Meter Readings during their ownership. This also includes limited information being made available to the Shipper appointed at a Prime Meter Point that relates to Sub Deduct Meter Point(s) in the configuration within which that Prime Meter Point resides.
- **Community** – this is where the party is **neither currently appointed or previously appointed** at the SMP or it is outside of the Network geography. Community view is information which is not within scope of the Portfolio view as described above.

**Please Note: The Services may have functionally distinct ways of representing this – e.g. DES will look at current portfolio holder to release this data – this will be reflected in the [Service Catalogue]*

4. DSC Core Customer

The CDSP has a Data Services Contract (DSC) with customers who are licensed gas Shippers and Gas Transporters (GTs) (“DSC Core Customers”)

DSC Core Customers consist of:

- DN Operators
- Independent Gas Transporters (IGTs)
- National Gas Transmission
- Shipper Users

DSC Core Customers are permitted to request and gain access to any data item (other than the “Restricted Data Items”) within their portfolio or own network which supports them in running their business. As such, this data is not classified as protected information and will not be controlled by the DPM.

The release of portfolio or network data to DSC core customers is set out within UNC V5.3.

For clarity and for the purposes of this document, Portfolio and Community View have been defined in section 3 above.

The Registered Shipper User for a Prime Meter Point may also access the following data items related to Sub Deduct Meter Points within the configuration to which the Prime Meter Point belongs:

- Supply Meter Point Reference Number
- Registered User
- Registered Supplier
- Meter Serial Number of the Meter Asset
- Meter Asset Status of the Meter Asset
- Converter Serial Number of the Converter Asset
- Meter Read Frequency
- Supply Meter Point Class
- Domestic Premises Indicator

The following data items will only be released for non domestic premises:

- Latest Sub Deduct Meter Reading and Round the Clock Value, including Converted and Unconverted Reading and RTC
- Latest Sub Deduct Meter Reading Date
- Latest Sub Deduct Meter Reading Source and Reason
- Meter and Converter Detail at Sub Deduct Meter Point – including: Number of Dials; Read Units / Multiplication Factor; Imperial Indicator (Meter only); Converter Conversion Factor (Converter only)
- MP Conversion Factor
- AQ and AQ Effective Date

The Registered Shipper User for a Class 1 Supply Meter Point may request (via the CDSP), access to hourly read data up to 18 months after the date that the hourly read was originally taken.

Retrospective data cannot be provided before the 01 April 2023. The earliest point a Shipper could receive the full 18-months of retrospective data is November 2024.

As per the BEIS Consultation regarding ‘Maximising Non-Domestic Smart Meter Consumer Benefits’ which concluded in June 2022, non-domestic end consumers of gas (or their approved Third Parties) can request access to retrospective hourly consumption data via their Supplier, which in turn will be requested by the Shipper User from the CDSP. Due to the extended period of time during which data can be requested by a non-domestic end consumer (or approved Third Parties), the requesting Registered Shipper User may not be the Portfolio Shipper for the entire period of consumption requested under this service. In this instance, the data requested will be considered as Portfolio data and provided to the requesting Registered Shipper User.

With effect from CSS Go Live, DSC Core Customer Community view will be accessed via the REC in accordance with the REC Data Access Matrix (“DAM”).

“Restricted Data Items” are those which are not available apart from for the permitted use. These data items would typically be excluded from the services considered by the Data Permissions Matrix. For example, Priority Services Register (PSR) information, Emergency Contacts.

5. Exclusions to Protected Information

Protected Information does not include:

- Aggregated data
- Obfuscated data – i.e. Data Masking

Providing the data is not attributable to either a User (Registered Shipper or Gas Transporter) or a consumer, it should not be considered Protected Information.

6. Data Permissions Matrix User types

The below confirms the User types which are included within the DPM and provides the relevant details as stated within the document purpose.

Department for Business, Energy and Industrial Strategy (BEIS)

Organisation Details / Recognised Role

Recognised Role – Government Department for Business, Energy and Industrial Strategy

Background

The Government has proposed the Energy Price Guarantee (EPG) (Gas) Scheme for customers, to secure reductions in the energy bills of consumers in Great Britain. The CDSP was appointed to perform the function of the EPG (Gas) Scheme (the ‘Scheme’) Administrator as a result of Urgent Modification [0824 - Appointment of CDSP as the Scheme Administrator for the Energy Price Guarantee \(EPG\) for Domestic Gas Consumers \(Gas\)](#).

Purpose of Access to Data

This Modification described the need to provide information to be provided to BEIS to monitor and audit the effective management of the Scheme.

Special Conditionality

BEIS will be provided with data by the CDSP acting in the capacity of the EPG Scheme Administrator (in accordance with UNC General Terms - D 1.9).

Review Timescales:

- The provision of data to BEIS will continue for the duration of the EPG Scheme and includes any data provision requirements (such as audit) that arise as a result of this scheme.

Commercial Model

- A Third-Party Services Contract must be in place with BEIS to allow the access of the data.

Local Authorities

Organisation Details / Recognised Role

Recognised Role – Local Authority

Background

Local Authorities (LAs) have an ambition to lead the reduction of carbon emissions in their locality, often to meet net zero target dates that are accelerated ahead of the UK's legally binding target date of 2050. To carry out this ambition LAs need to access data relating predominantly to consumers addresses and gas usage in order to target engagement with such consumers and monitor strategy outcomes.

UNC Modification 0769 and IGT UNC Modification 157 'Adding Local Authorities as a new User type to the Data Permissions Matrix' have been approved to amend the Data Permissions Matrix (DPM) to enable the release of data to Local Authorities.

The Data Permissions Matrix Conditionality document will be updated to describe the use cases upon which data will be provided to LAs as each request is approved. Release of data will be on a case by case basis and individual DRRs will be taken to future CoMC's for approval.

Purpose of Access to Data

The LAs have requested access to address and gas usage data within the DPM, which will allow them to lead on the reduction of carbon emissions in their locality.

Any data request by a Local Authority must first be assessed by RECCo to determine whether or not the request would be considered a Gas Enquiry Service as defined in the REC. In the event that RECCo determine the request would not be considered as a Gas Enquiry Service; DSC CoMC may subsequently consider approving the request as a UNC service.

Special Conditionality

The data items an LA can gain access to are individual to each Local Authority request and will be approved by the DSC CoMC.

Review Timescales:

- This is an enduring service and there is currently no end date.
- Each individual Local Authority request will have to specify the period of time that they require access to the data for and access will then be limited to this rather than ongoing.

Commercial Model

- A Third-Party Services Contract must be in place between Xoserve and the individual Local Authority to allow the access of the data.

Performance Assurance Framework Administrator (PAFA)

Organisation Details / Recognised Role

Name: Performance Assurance Framework Administrator (PAFA)

Company Number: 04419878 – *Gemserv Limited as the PAFA*

Background

The Performance Assurance Framework (PAF) and Governance Arrangements were introduced to facilitate assurance and incentivisation of settlement accuracy post-implementation of Project Nexus. This was introduced under UNC Modification [0506V – Gas Performance Assurance Framework and Governance Arrangements](#).

This encompassed the creation of the Performance Assurance Framework Administrator (PAFA) and a UNCC-subcommittee – the Performance Assurance Committee (PAC) to oversee the PAFA scheme.

UNC Modification [0520A – Performance Assurance Reporting](#) and IGT UNC [TBC] introduced the Performance Assurance Report Register (PARR) to support the PAF scheme.

PAFA were added to the DPM on 14 April 2020 following the implementation of UNC Modification [0707S - Introducing 'Performance Assurance Framework Administrator' as a new User type to the Data Permissions Matrix](#) and IGT UNC Modification [IGT136 – Introducing 'Performance Assurance Framework Administrator' as a new user type to the Data Permissions Matrix](#)

Purpose of Access to Data

To allow for the monitoring of Shipper performance in elements that related to settlement accuracy and facilitate an incentive regime to improve performance and reduce settlement risk. This is to strive for more accurate and up to date information being held on Xoserve's system and therefore improve accuracy settlement and information in relation to system utilisation and capacity needs.

Special Conditionality

The Performance Assurance Report Register (PARR) is provided under the [Performance Assurance Framework Document](#) and details the reports agreed.

Data items to give PAFA the permissions to receive data via the Data Discovery Platform (DDP) was agreed through the approval of a Disclosure Request Report - [Allow PAFA access to the data via the DDP](#).

PAFA will only receive EUC Identifier Code relating to meter points that are in EUC bands 03-09.

Commercial Model

- A Contract is in place between Xoserve and the PAFA for the purposes of conducting the functions set out by the PAF Document as detailed within UNC TPD Section V16

- No Third-Party Services Contract is required for the release of this information to the PAFA as this is obligated under UNC and the CDSP provide the data as set out within the DSC Service Line which is provided on behalf of the Transporters.

Retail Energy Code Company (RECCo)

Organisation Details / Recognised Role

Name: Retail Energy Code Company (RECCo)

Company Number: 10989875 – *Retail Energy Code Company*

Background

The Retail Energy Code Company (RECCo) are responsible for ensuring the proper, effective, and efficient implementation and ongoing management of the Retail Energy Code (REC). In addition to other industry data sources the UK Link system will provide a logical and efficient source of data to support this objective.

UNC Modification [0762](#) and IGT UNC Modification [155](#) 'Adding the Retail Energy Code Company as a new User type to the Data Permissions Matrix' enabled the release of data to the Retail Energy Code Company and also to parties appointed by RECCo to fulfil specific roles under the Retail Energy Code.

To support the REC objective, RECCo has procured the services of the REC Code Manager. The role of the REC Code Manager will be delivered in three parts by three providers, REC Professional Services (RPS); REC Performance Assurance (RPA); and REC Technical Services provider (RTS).

If further use cases are identified for other REC Code Managers, and the RECCo itself, then additional DRRs will be raised for approval by CoMC and the use cases will be described in this document.

For the avoidance of doubt, where this document includes provision of a data item in a specific use case to the Code Manager, the RECCo shall be entitled to access any such data. Any approvals for provision of data to the REC Code Manager should be noted in this context.

REC Performance Assurance Code Manager

This party is granted access under the provision of data to the RECCo, described above under UNC Modification 0762 and IGT UNC Modification 0155. Access to continue until otherwise agreed, this will be no earlier than REC V3.0 implementation. [DRRJUN21-01](#) was approved by CoMC on 16th June 2021 and the updated [DRRJUL21-02](#) was approved by CoMC on 21st July 2021, as the use cases to support the procurement of data by the RECCo for provision to the RPA.

Purpose of Access to Data

RECCo will be permitted to access an approved dataset for the purpose of providing that data to the RPA. This will satisfy the RPA obligation to assess and report on REC parties' performance. Reporting will be provided directly to the RPA by the CDSP on request from RECCo.

Special Conditionality

The obligation on the RPA to assess and report on REC parties' performance is set out in schedule 6 of the REC.

Review Timescales:

- This is an enduring service and there is currently no end date.

Commercial Model

Reporting services will be provided under a Framework Agreement between CDSP and RECCo as agreed in accordance with the DSC Third Party and Additional Services Policy.

Research Body

Organisation Details / Recognised Role

Recognised Role – Research Body

Background

The Ofgem Energy Data Taskforce signalled the intent that data should be 'presumed open' and therefore the concept of a Research Body was introduced through UNC Modification [0702S - Introducing 'Research Body' as a new User type to the Data Permissions Matrix and UNC TPD Section V5](#) and IGT UNC Modification [IGT134 – Introducing 'Research Body' as a new user type to the Data Permissions Matrix and IGT UNC](#).

A Research Body is a generic User type and is not linked to a specific market participant or role. They are an organisation that requires access to information for the purposes of promoting innovation, operational excellence and efficiency in the UK Energy Industry that will benefit consumers, government and society.

Research Body were added to the DPM as a new User type following the implementation of UNC Modification 0702 and IGT Modification 134.

This resulted in the following text being inserted into the UNC:

Research Body is an organisation which requires access to gas industry data for an Agreed Objective and an agreed period of time. An "Agreed Objective" may include (but is not limited to) the following, but only where the Research Body can demonstrate to the DSC Contract Management Committee that their research will benefit consumers, government or society: promoting innovation; developing/delivering operational excellence; and/or developing/delivering efficiency in the UK energy industry.

Purpose of Access to Data

Research Bodies require access to information for the purposes of promoting innovation, operational excellence and efficiency in the UK Energy Industry that will benefit consumers, government and society.

Special Conditionality

The data items a Research Body can gain access to are individual to each Research Body request. This will be in line with the Research Body Request Framework and each request will be approved by the DSC CoMC.

Any data request by a Research Body must first be assessed by RECCo to determine whether or not the request would be considered a Gas Enquiry Service as defined in the REC.

In the event that RECCo determine the request would not be considered as a Gas Enquiry Service; DSC CoMC may subsequently consider approving the request as a UNC service.

It is expected that the data provided will be subject to some level of anonymisation.

Any data exclusions or conditionality will be subject to the individual Research Body request.

Review Timescales:

- Providing this service for Research Bodies is enduring and there is currently no end date
- Each individual Research Body request will have to specify the period of research and access will be limited to this rather than ongoing.

Commercial Model

- A Third-Party Research Body Contract must be in place between Xoserve and the individual Research Body to allow the access of the data.

Supplier

Organisation Details / Recognised Role

Recognised Role - Supplier

Background

Suppliers are able to access a range of 'Retail' gas industry data via the Gas Enquiry Service under the Retail Energy Code. Suppliers are retained in the Data Permissions Matrix so that 'Wholesale' Portfolio data can be provided where a requirement has been identified and approved.

Purpose of Access to Data

Suppliers may access 'Wholesale' data related to their Portfolio of Supply Meter Points.

Special Conditionality

In addition to the generic ability for a Supplier to be able to request Wholesale data related to their portfolio, Suppliers will be provided with aggregated (Wholesale) data related to their portfolio by the CDSP acting in the capacity of the EPG Scheme Administrator (in accordance with UNC General Terms - D 1.9).

Review Timescales:

- Provision of Wholesale data to Suppliers would be an enduring service and an end date is not specified. Following conclusion of the EPG Scheme, Suppliers will be retained on the Data Permissions Matrix even in the event that a Wholesale data request has not been made by Suppliers. This will facilitate future requests from Suppliers.

Commercial Model

- For the purposes of the EPG Scheme, a Third-Party Supplier Contract will be in place with BEIS and any Shipper or Supplier who chooses to accede to the EPG Scheme, to allow the provision of the data to participant Suppliers.

The holder of an “Electricity Transmission Licence”

Organisation Details / Recognised Role

Name: The holder of an “Electricity Transmission Licence”

Company Number: 11014226 - *National Grid Electricity System Operator Limited*

Background

Each year, National Grid Electricity System Operator (NG ESO) produces the Future Energy Scenarios (FES) report which maps out credible pathways and scenarios for the future of energy. On the 01 April 2019 NG ESO was established as a separate legal entity within the National Grid Group.

The holder of an “Electricity Transmission Licence” was added to the DPM as a new User type on 17 June 2020 through the implementation of UNC Modification [0715](#) and IGT UNC Modification [139](#).

This resulted in the following text being inserted into the UNC:

“Electricity Transmission Licence” (as defined in Section 6(b) in the Electricity Act 1989), to allow it to fulfil its licence obligations.

Purpose of Access to Data

Based on input from experts, it looks at the energy needed in Britain, across electricity and gas - examining where it could come from, how it needs to change and what this means for consumers and the energy system itself. NG ESO produces Electricity Ten Year Statement (ETYS) annually. It's part of the annual electricity transmission planning cycle and shows the likely future transmission requirements of bulk power transfer capability of the National Electricity Transmission System (NETS). To gather relevant information for these publications, NG ESO needs to obtain certain data.

Any data request by the holder of an ‘Electricity Transmission Licence’ must first be assessed by RECCo to determine whether or not the request would be considered a Gas Enquiry Service as defined in the REC.

In the event that RECCo determine the request would not be considered as a Gas Enquiry Service; DSC CoMC may subsequently consider approving the request as a UNC service.

Special Conditionality

NG ESO were granted the permissions to receive data through the approval of a Disclosure Request Report - [Allow National Grid ESO access to our data in a Reporting Suite of ten individual reports of varying frequency on an annual basis](#).

The information NG ESO require relates to specific Energy data.

Review Timescales:

- Xoserve will send NG ESO 10 individual reports of varying frequency which is set out within the DRR.

Commercial Model

- A Third-Party Services Contract is in place between Xoserve and the NG ESO to allow the release of the data

7. Ofgem Data Requests

Organisation Details/Recognised Role

Name: Office of Gas and Electricity Markets (Ofgem)

Background

Ofgem is Great Britain's independent energy regulator and operates within a statutory framework set by Parliament. Whilst Xoserve is not regulated by Ofgem each of Xoserve's customers under the DSC are.

Access to data

Ofgem's access to data is either via request to Gas Transporters in accordance with the requirements of Standard Special Licence Condition A26 (Provision of Information to the Authority) ("SSLC A26") or via the CDSP.

The terms of the DSC permit Xoserve to share aggregated level data with Ofgem provided that there is no material cost or risk to DSC customers, in which case Xoserve must notify CoMC of any request made (either before or after the data is provided) ¹

Any request for non-aggregated data made by Ofgem must, in the first instance, be consulted on with the Gas Transporters to determine if the request is to be made in accordance with the requirements of SSLC A26.

8. Version Control

Version	Date:	Author	Status
1.0	16/09/2020	Ellie Rogers	Approved at September CoMC
2.0	18/11/2020	Ellie Rogers	Updated following approval of DRROCT20-01 which removed the exclusion of non-domestic data for PCWs and TPIs.
3.0	16/12/2020	Ellie Rogers	Updates to 'The parties given the power of investigation and consumer issue resolution' to clarify who

¹ See CDSP Service Document Contract Management Arrangements.

			<p>has access under this User type</p> <p>Updates to provide the definition for the following User types as per the previous legal text within UNC TPD Section V: PCW/TPI, Research Body, 'the holder of an "Electricity Transmission Licence"'. The definition for PCW and TPIs removed the reference to 'domestic' as a result of DRR-OCT-01.</p>
4.0	17/03/2021	Simon Harris	The Committee clarified in March-21 that the Portfolio View shall be available for Domestic Supply Meter Points only. Updated details within Meter Asset Provider (Section 6) accordingly.
5.0L	16/06/2021	Jai Le Resche (David Addison)	<p>Addition of the Retail Energy Code as a user type within Section 6 in accordance with Mod 0762 / IGT UNC 0155, and following approval of DRRJUN21-01.</p> <p>Amends to reflect June 2021 DSC CoMC approval and comments.</p>
6.0	18/08/2021	Jayne McGlone	Approval for reporting service to AlTHANCo to be extended for a further two years.
7.0	11/11/2021	Jai Le Resche	<p>Addition of Local Authorities as a user type following approved implementation of Modification 0769.</p> <p>Release of data will be on a case by case basis and individual DRRs will be taken to future CoMC's for approval.</p>
8.0	15/12/2021	Jayne McGlone	Inclusion of condition in relation to the provision of

			EUC Identifier Code to PAFA.
9.0	19/01/2022	Jayne McGlone	<p>Various changes proposed to CoMC:</p> <ol style="list-style-type: none"> 1) Change to DSC Core Customer Portfolio/Community View 2) Changes to DPM User Type – MAP 3) Change to include Ofgem data requests 4) Changes to DPM 5) Cosmetic changes to DPM CD
10.0	11/07/22	Jayne McGlone	<p>Amendments required to reflect the changes in data governance with effect from CSS Go Live and the transition of the following organisation types from the DPM to the DAM:</p> <p>Alt Han Company</p> <p>Energy Theft Tip-Off Service</p> <p>Industrial and Commercial Customer</p> <p>Meter Asset Manager</p> <p>Meter Asset Provider</p> <p>Price Comparison Website and Third Party Intermediary</p> <p>Supplier</p> <p>The holder of the smart meter communication licence</p> <p>The parties given the power or investigation and consumer issue resolution (Citizens Advice)</p> <p>Theft Risk Assessment Service</p>
11.0	27/09/2022	David Addison	Provision of information related to Sub Deduct

			<p>Meter Points to Prime Registered User.</p> <p>Reinstatement of Suppliers for Wholesale Data and EPG Scheme.</p> <p>Addition of BEIS for EPG Scheme.</p>
12.0 For Approval	05/12/2022	David Addison	Supplementary Sub Deduct Supply Meter Point Information to Prime Registered User.
13.0	18/01/2023	David Addison	Additional information to release data
14.0 Live	01/04/2023	Ellie Rogers	<p>Clarity on the release of hourly read data, in line with XRN5379 implementation.</p> <p>Update to reflect National Gas Transmission name change.</p>