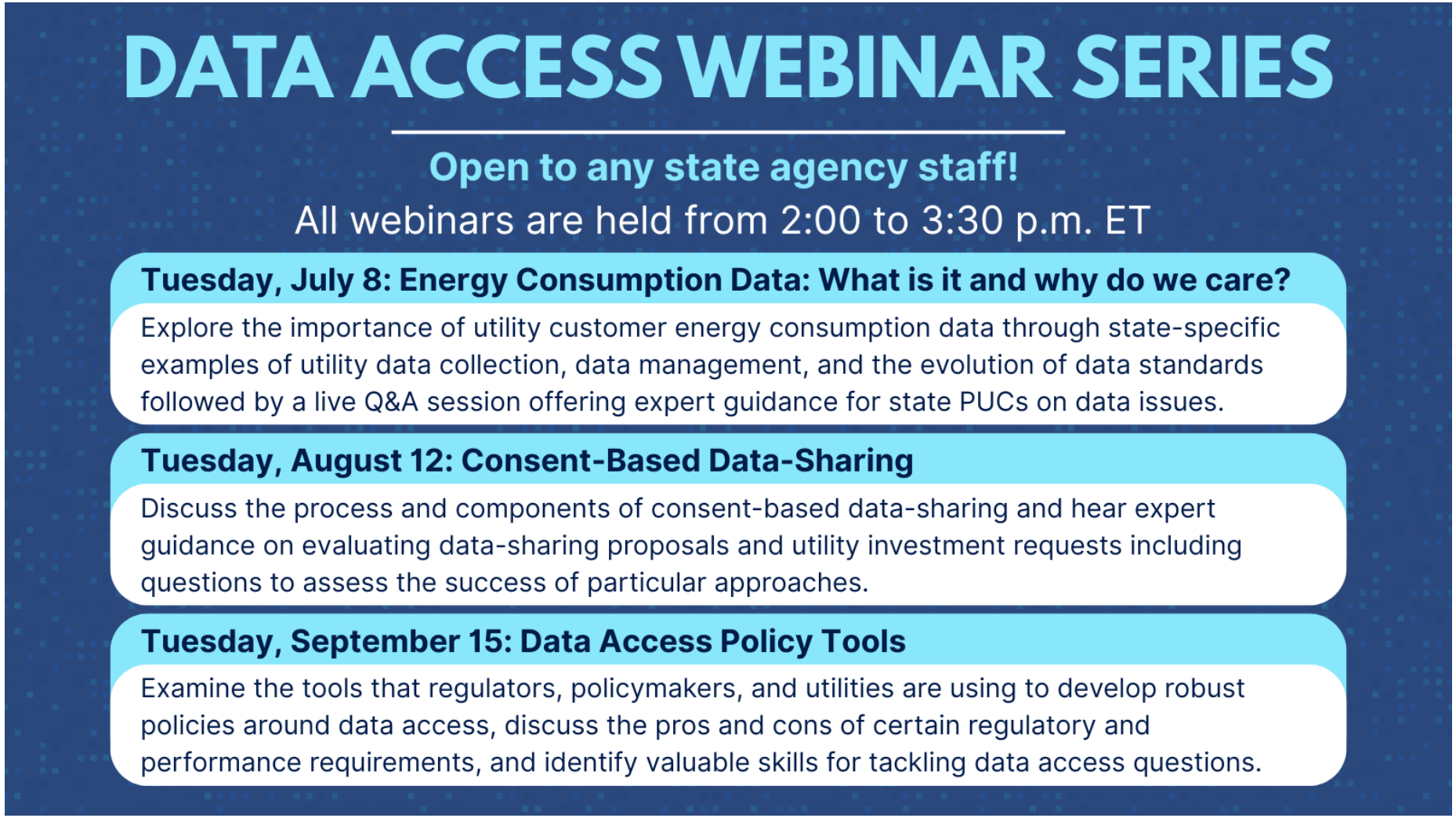
NARUC
National Association of
Regulatory Utility Commissioners

Consent-based Data Sharing

August 12, 2025

Webinar Series



Agenda

- Overview of Webinar Series and Technical Assistance Session
  - *Jeff Loiter, NARUC, Technical Director*
- Moderator's Opening Remarks
  - *Commissioner Davante Lewis, Louisiana Public Service Commission*
- Expert Presentations
  - *Kelly Crandall, Vice President of Regulatory and Policy, UtilityAPI*
  - *Simon Evans, Director, and Rob Best, Associate Principal, Arup*
  - *Adrianne Bletz, Energy Policy Analyst, Office of Markets and Innovation NY Dept. of Public Service*
  - *Nina Suetake, Deputy Director of Policy, NASUCA*
- Q&A
- Wrap-up

Consent-Based Data-Sharing

NARUC Data Access Webinar | August 12, 2025

Kelly Crandall, VP of Regulatory & Policy (kelly@utilityapi.com)

UTILITYAPI

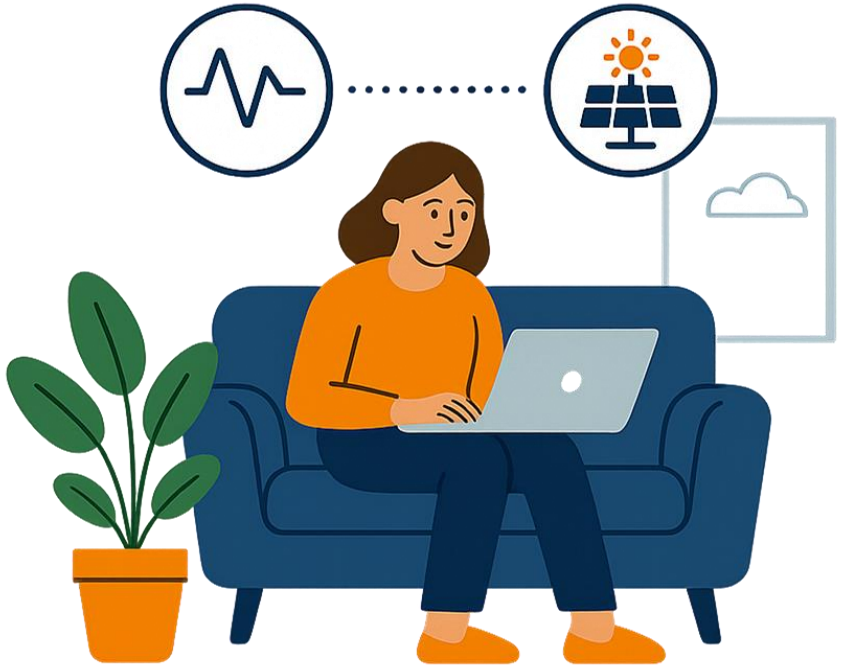
Why do utility customers share their energy data?

Residential:

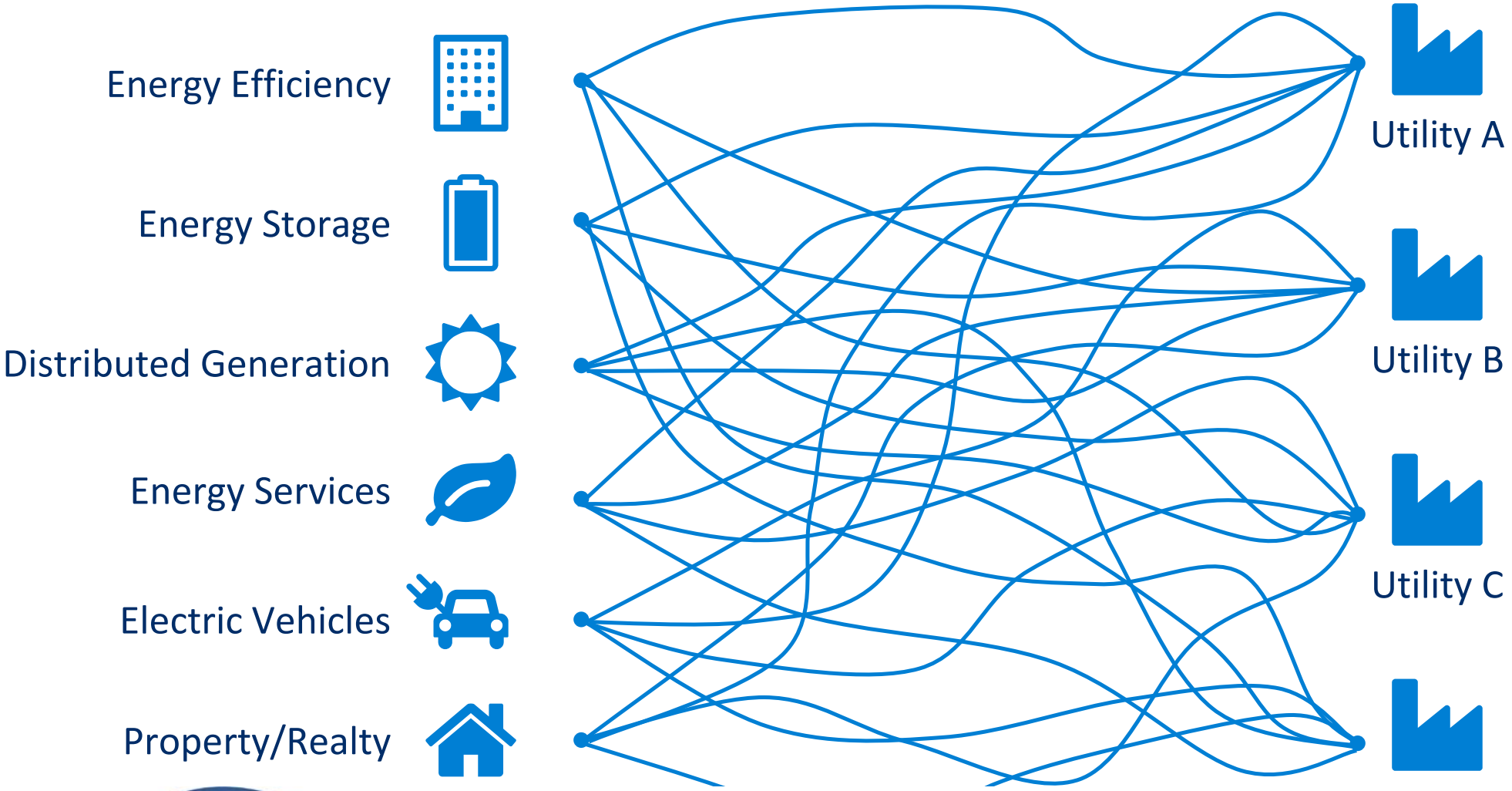
- Receive a solar and battery storage proposal
- Enroll in a virtual power plant program
- Enroll in a community solar project
- Optimize their EV charging
- Electrify their home
- Receive a quote from a retail energy provider

Commercial:

- Receive a solar and battery storage proposal
- Enroll in a demand response program
- Track and project billing and usage trends
- Prioritize facilities for energy upgrades
- Process a payment
- Monitor performance for ESG reporting

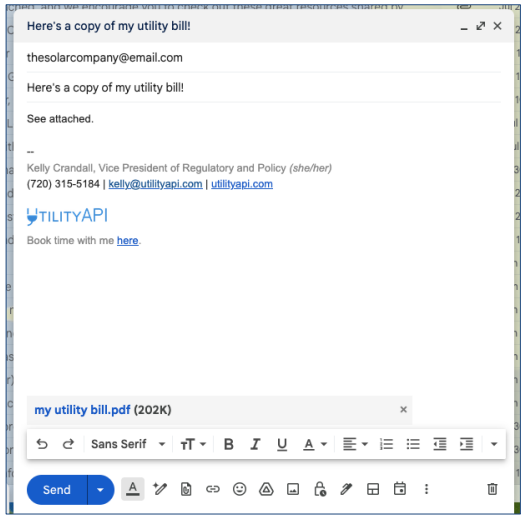


The situation on the ground….



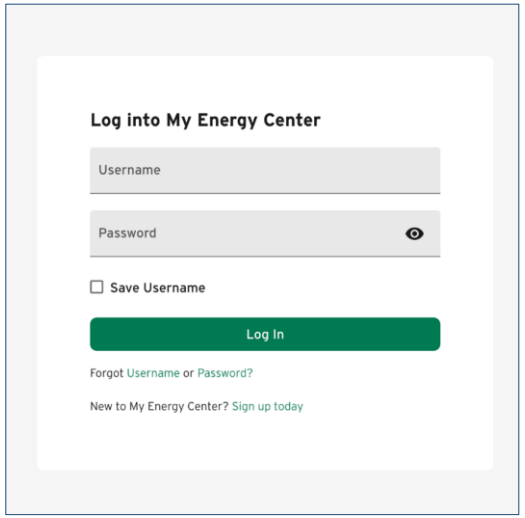
How is energy data accessed today?

Emails & Credential Sharing

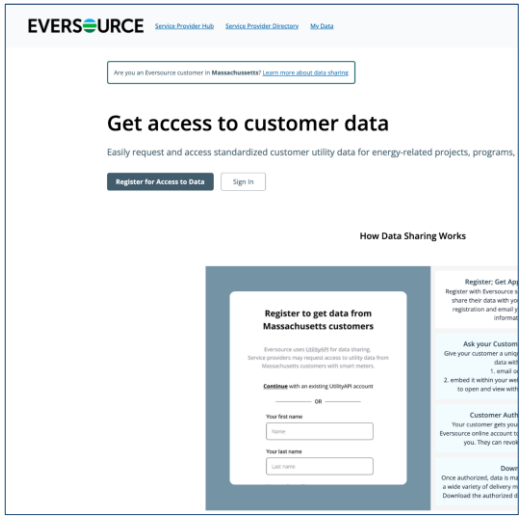


Letters of Authorization

Web Portal Adapters

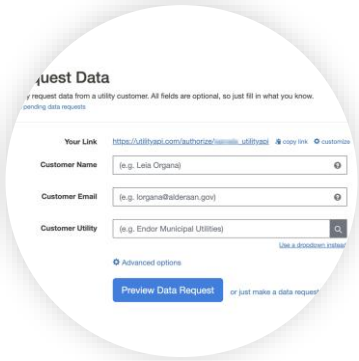


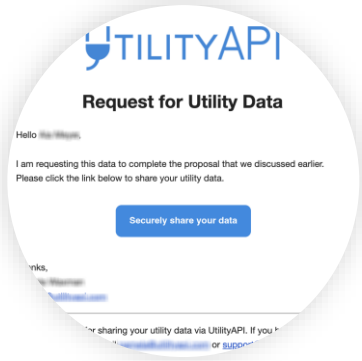
Utility Platforms/APIs



Digging into digital authorization

Register	Request	Authorize	Share
Third-party user (i.e. company) registers with utility platform.	Registered user asks utility account holder to authorize access to their data and sharing.	Utility account holder authorizes access and data sharing.	Utility account holder's data is securely collected and shared with third party user.





Software industry best practices make data-sharing work for customers, third parties, and utilities:

01

STANDARDIZED DATA

Structured data supports analysis (including AI) for customers regardless of utility

02

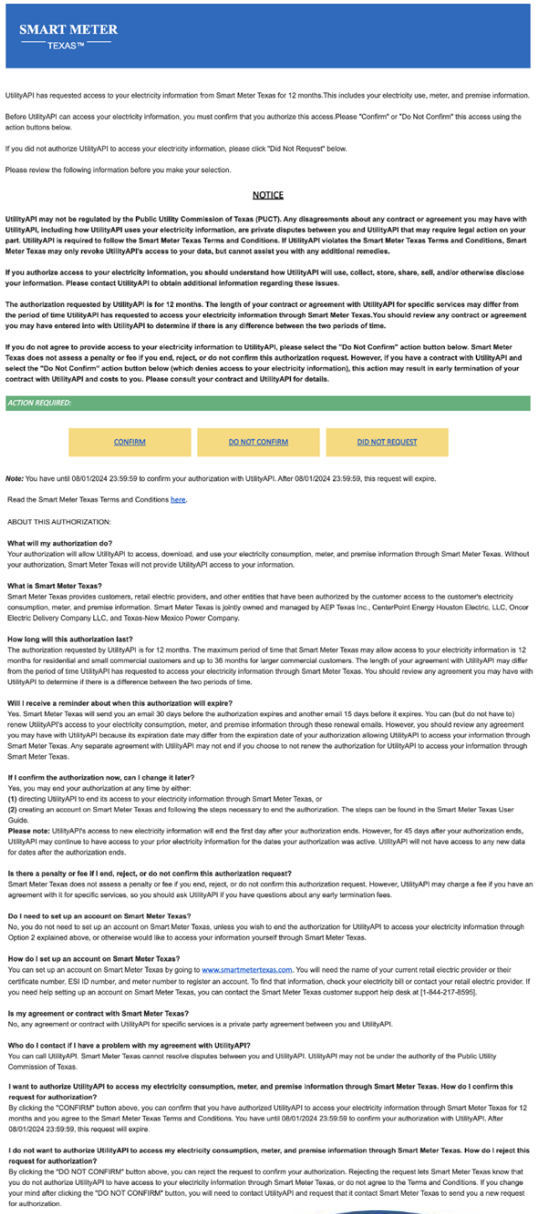
SECURITY BY DESIGN

Leveraging OAuth 2.0 protocol for authorization is secure and recognizable to the customer

03

IDENTITY MANAGEMENT

Levels of a access can be differentiated depending on a third party's purpose and role



SMART METER
TEXAS™

UtilityAPI has requested access to your electricity information from Smart Meter Texas for 12 months.This includes your electricity use, meter, and premise information.

Before UtilityAPI can access your electricity information, you must confirm that you authorize this access.Please "Confirm" or "Do Not Confirm" this access using the action buttons below.

If you did not authorize UtilityAPI to access your electricity information, please click "Did Not Request" below.

Please review the following information before you make your selection.

NOTICE

UtilityAPI may not be regulated by the Public Utility Commission of Texas (PUCT). Any disagreements about any contract or agreement you may have with UtilityAPI, including how UtilityAPI uses your electricity information, are private disputes between you and UtilityAPI that may require legal action on your part. UtilityAPI is required to follow the Smart Meter Texas Terms and Conditions. If UtilityAPI violates the Smart Meter Texas Terms and Conditions, Smart Meter Texas may only revoke UtilityAPI's access to your data, but cannot assist you with any additional remedies.

If you authorize access to your electricity information, you should understand how UtilityAPI will use, collect, store, share, sell, and/or otherwise disclose your information. Please contact UtilityAPI to obtain additional information regarding these issues.

The authorization requested by UtilityAPI is for 12 months. The length of your contract or agreement with UtilityAPI for specific services may differ from the period of time UtilityAPI has requested to access your electricity information through Smart Meter Texas.You should review any contract or agreement you may have entered into with UtilityAPI to determine if there is any difference between the two periods of time.

If you do not agree to provide access to your electricity information to UtilityAPI, please select the "Do Not Confirm" action button below. Smart Meter Texas does not assess a penalty or fee if you end, reject, or do not confirm this authorization request. However, if you have a contract with UtilityAPI and select the "Do Not Confirm" action button below (which denies access to your electricity information), this action may result in early termination of your contract with UtilityAPI and costs to you. Please consult your contract and UtilityAPI for details.

ACTION REQUIRED:

CONFIRM | DO NOT CONFIRM | DID NOT REQUEST

Note: You have until 08/01/2024 23:59:59 to confirm your authorization with UtilityAPI. After 08/01/2024 23:59:59, this request will expire.

Read the Smart Meter Texas Terms and Conditions here.

ABOUT THIS AUTHORIZATION:

What will my authorization do?
Your authorization will allow UtilityAPI to access, download, and use your electricity consumption, meter, and premise information through Smart Meter Texas. Without your authorization, Smart Meter Texas will not provide UtilityAPI access to your information.

What is Smart Meter Texas?
Smart Meter Texas provides customers, retail electric providers, and other entities that have been authorized by the customer access to the customer's electricity consumption, meter, and premise information. Smart Meter Texas is jointly owned and managed by AEP Texas Inc., CenterPoint Energy Houston Electric, LLC, Oncor Electric Delivery Company LLC, and Texas-New Mexico Power Company.

How long will this authorization last?
The authorization requested by UtilityAPI is for 12 months. The maximum period of time that Smart Meter Texas may allow access to your electricity information is 12 months for residential and small commercial customers and up to 36 months for larger commercial customers. The length of your agreement with UtilityAPI may differ from the period of time UtilityAPI has requested to access your electricity information through Smart Meter Texas. You should review any agreement you may have with UtilityAPI to determine if there is a difference between the two periods of time.

Will I receive a reminder about when this authorization will expire?
Yes. Smart Meter Texas will send you an email 30 days before the authorization expires and another email 15 days before it expires. You can (but do not have to) renew UtilityAPI's access to your electricity consumption, meter, and premise information through these renewal emails. However, you should review any agreement you may have with UtilityAPI because its expiration date may differ from the expiration date of your authorization allowing UtilityAPI to access your information through Smart Meter Texas. Any separate agreement with UtilityAPI may not end if you choose to not renew the authorization for UtilityAPI to access your information through Smart Meter Texas.

If I confirm the authorization now, can I change it later?
Yes, you may end your authorization at any time by either:
(1) directing UtilityAPI to end its access to your electricity information through Smart Meter Texas, or
(2) creating an account on Smart Meter Texas and following the steps necessary to end the authorization. The steps can be found in the Smart Meter Texas User Guide.
Please note: UtilityAPI's access to new electricity information will end the first day after your authorization ends. However, for 45 days after your authorization ends, UtilityAPI may continue to have access to your prior electricity information for the dates your authorization was active. UtilityAPI will not have access to any new data for dates after the authorization ends.

Is there a penalty or fee if I end, reject, or do not confirm this authorization request?
Smart Meter Texas does not assess a penalty or fee if you end, reject, or do not confirm this authorization request. However, UtilityAPI may charge a fee if you have an agreement with it for specific services, so you should ask UtilityAPI if you have questions about any early termination fees.

Do I need to set up an account on Smart Meter Texas?
No, you do not need to set up an account on Smart Meter Texas, unless you wish to end the authorization for UtilityAPI to access your electricity information through Option 2 explained above, or otherwise would like to access your information yourself through Smart Meter Texas.

How do I set up an account on Smart Meter Texas?
You can set up an account on Smart Meter Texas by going to www.smartmetertexas.com. You will need the name of your current retail electric provider or their certificate number, ESI ID number, and meter number to register an account. To find that information, check your electricity bill or contact your retail electric provider. If you need help setting up an account on Smart Meter Texas, you can contact the Smart Meter Texas customer support help desk at [1-844-217-8595].

Is my agreement or contract with Smart Meter Texas?
No, any agreement or contract with UtilityAPI for specific services is a private party agreement between you and UtilityAPI.

Who do I contact if I have a problem with my agreement with UtilityAPI?
You can call UtilityAPI. Smart Meter Texas cannot resolve disputes between you and UtilityAPI. UtilityAPI may not be under the authority of the Public Utility Commission of Texas.

I want to authorize UtilityAPI to access my electricity consumption, meter, and premise information through Smart Meter Texas. How do I confirm this request for authorization?
By clicking the "CONFIRM" button above, you can confirm that you have authorized UtilityAPI to access your electricity information through Smart Meter Texas for 12 months and you agree to the Smart Meter Texas Terms and Conditions. You have until 08/01/2024 23:59:59 to confirm your authorization with UtilityAPI. After 08/01/2024 23:59:59, this request will expire.

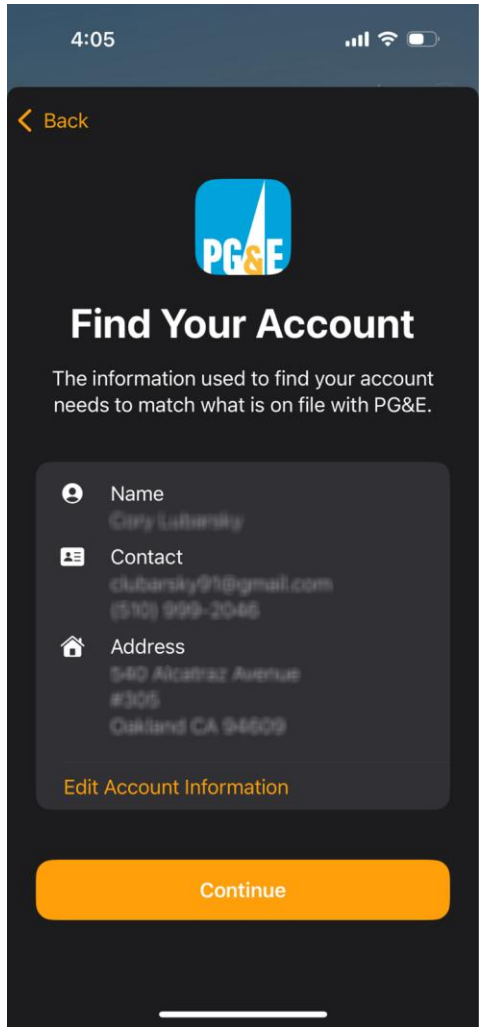
I do not want to authorize UtilityAPI to access my electricity consumption, meter, and premise information through Smart Meter Texas. How do I reject this request for authorization?
By clicking the "DO NOT CONFIRM" button above, you can reject the request to confirm your authorization. Rejecting the request lets Smart Meter Texas know that you do not authorize UtilityAPI to have access to your electricity information through Smart Meter Texas, or do not agree to the Terms and Conditions. If you change your mind after clicking the "DO NOT CONFIRM" button, you will need to contact UtilityAPI and request that it contact Smart Meter Texas to send you a new request for authorization.

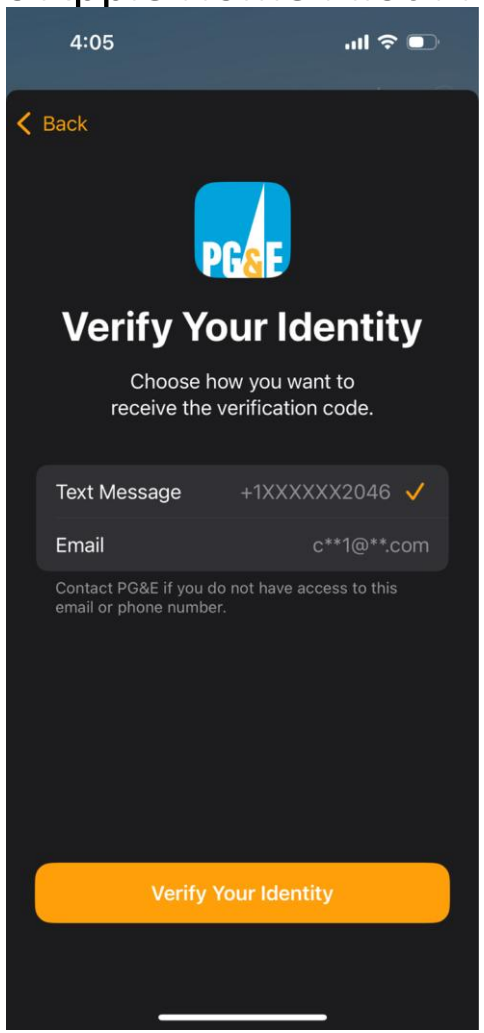
Avoid design that creates friction:

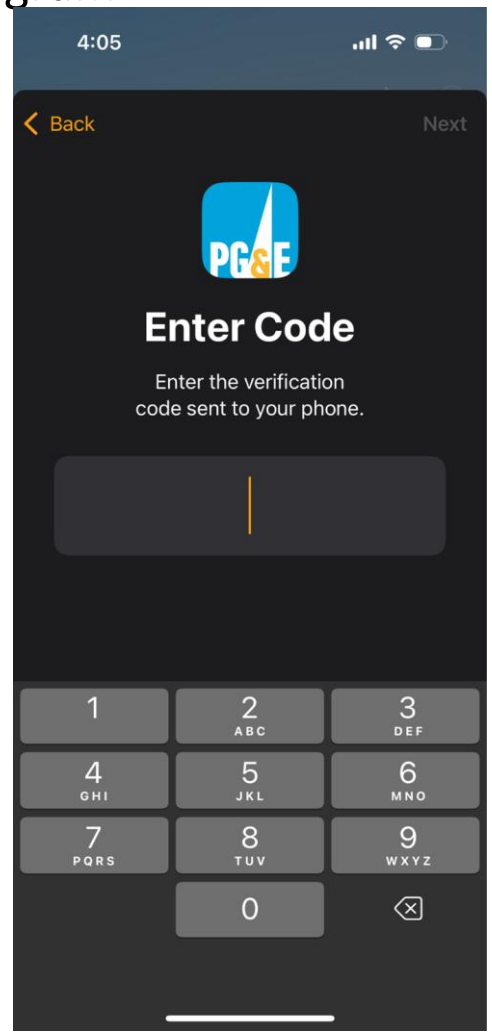
- Third-Party Registration Hurdles
- Confusing, Multi-Step Process
- Ambiguous or Unclear Consent
- Manual Processes and Long Lag Times
- Incomplete Datasets and Coverage

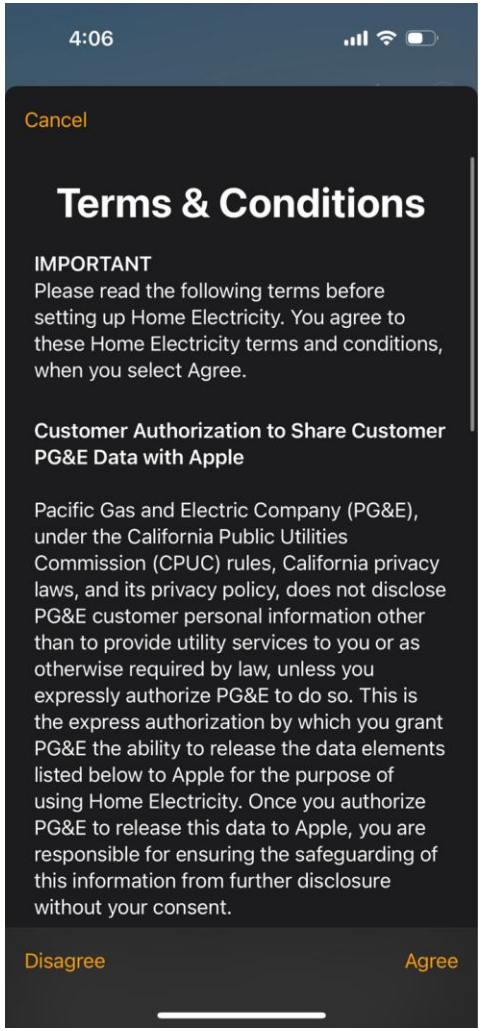
Example of a smooth authorization experience

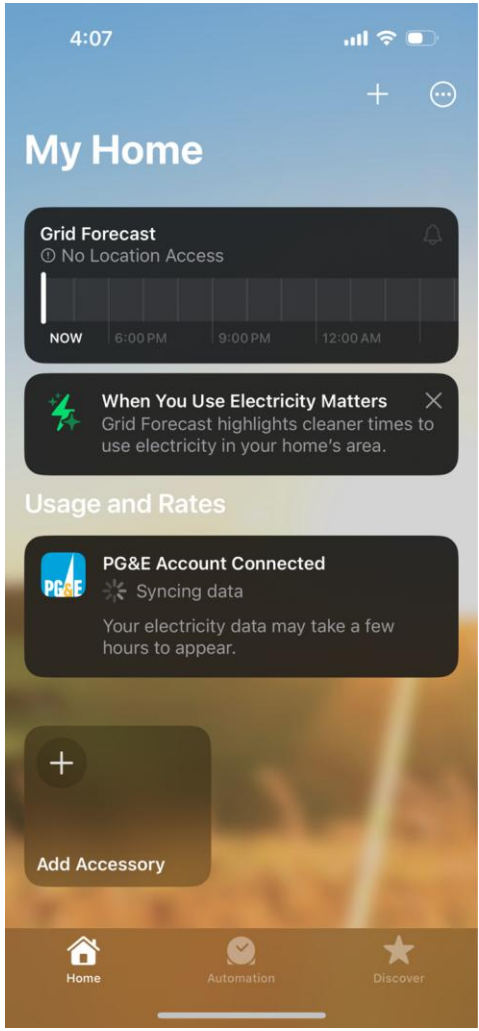
Pacific Gas and Electric's Apple Home Pilot Program











ARUP

“Digital Spine”

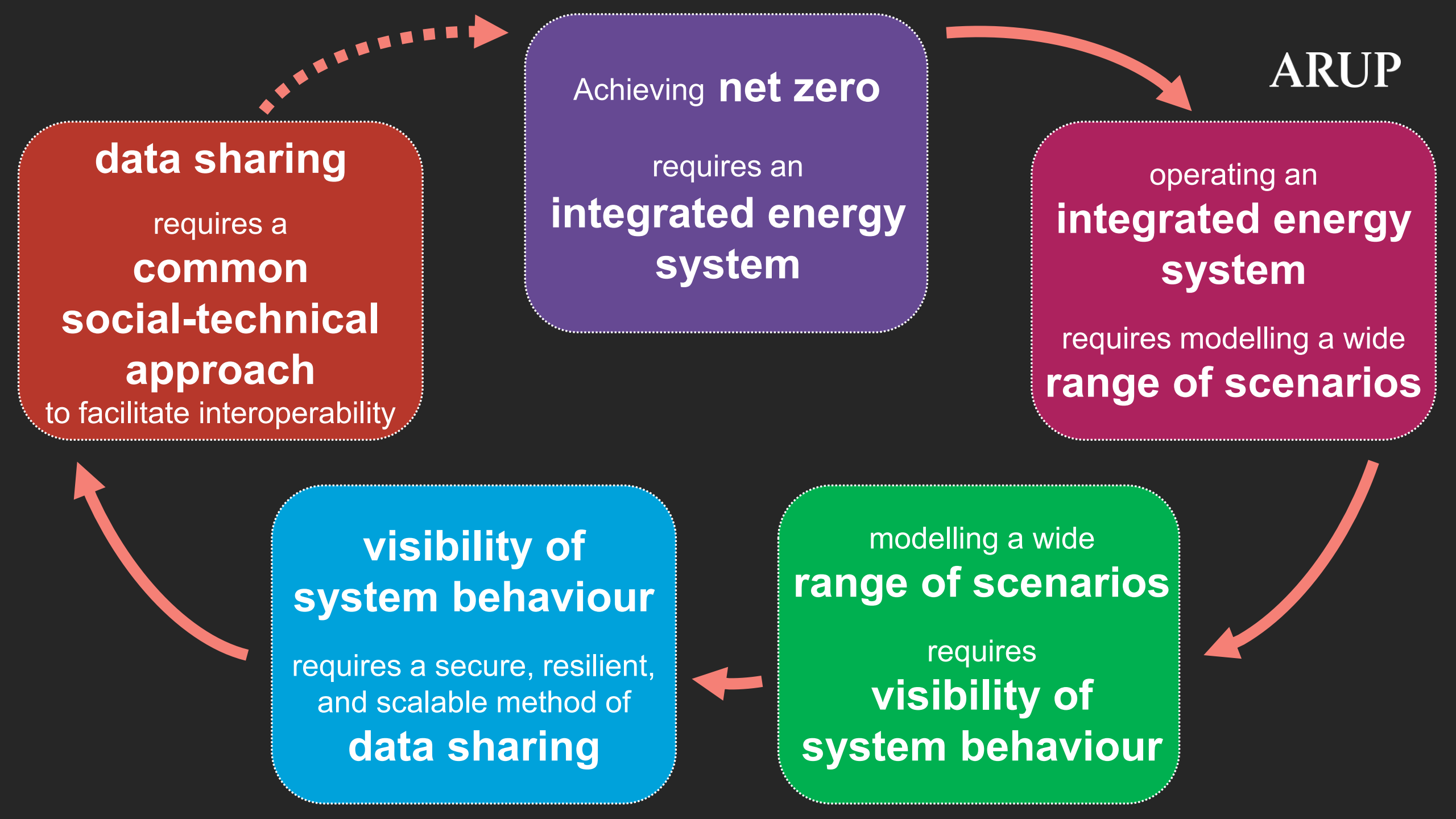
Building the energy system’s data sharing infrastructure

Simon Evans

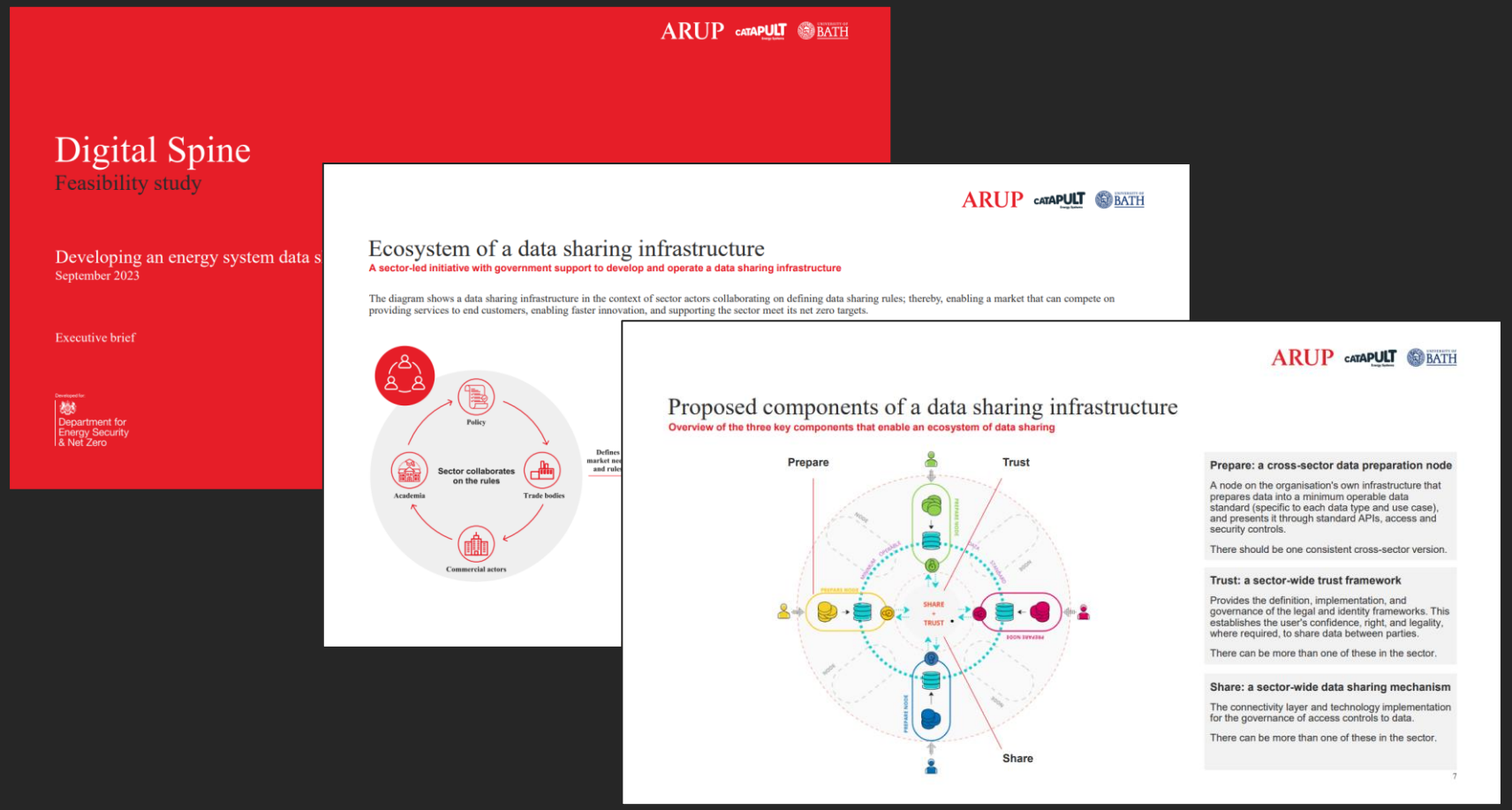
Director & Global Digital Energy Leader, Arup

Vice President, Institution of Mechanical Engineers

/sjevansuk


ARUP
Achieving net zero
requires an
integrated energy system
operating an
integrated energy system
requires modelling a wide
range of scenarios
modelling a wide
range of scenarios
requires
visibility of system behaviour
visibility of system behaviour
requires a secure, resilient, and scalable method of
data sharing
data sharing
requires a
common social-technical approach
to facilitate interoperability

ARUP

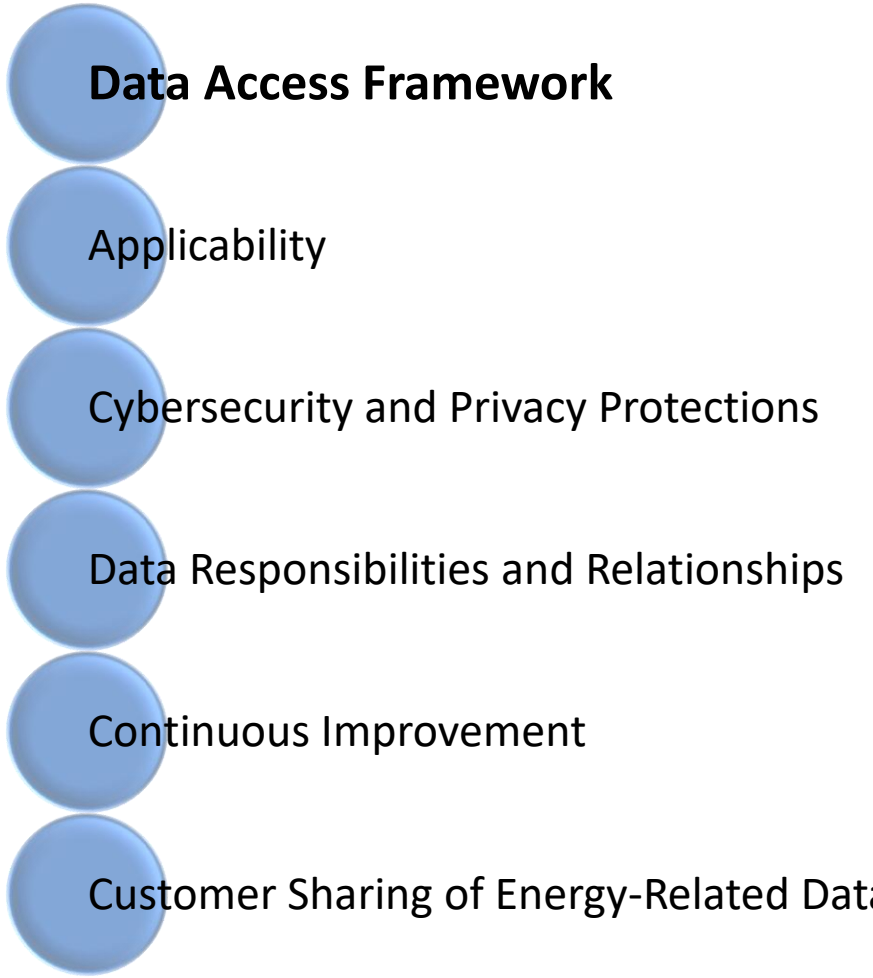


For more information and to read the reports visit:

www.arup.com/projects/digital-spine-feasibility-study/

Enabling Useful Access to Useful Data

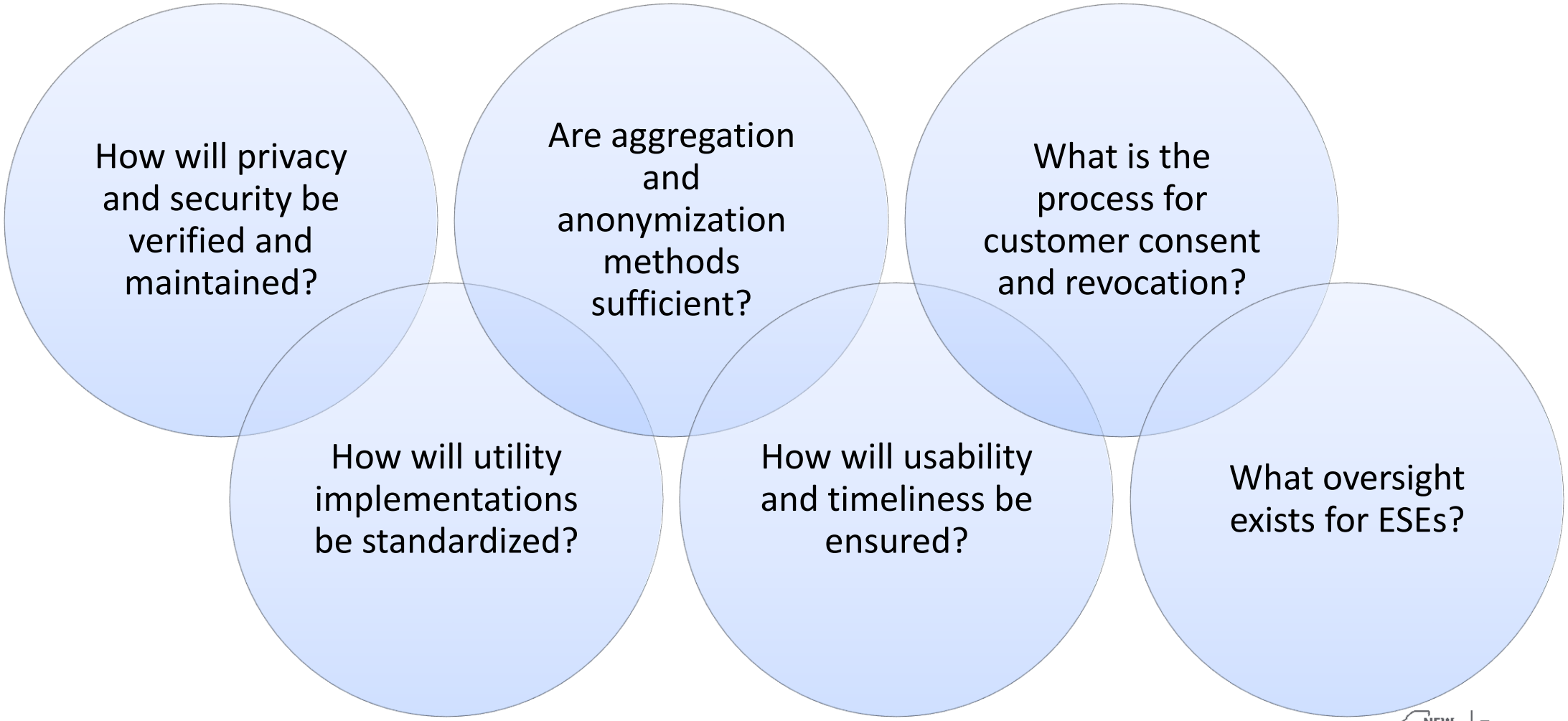
- Single source for statewide data access requirements
- Applies to all Energy Service Entities (ESEs)
- Defines cybersecurity and privacy requirements based upon consented/unconsented request, data access mechanism, and data type
- Data quality and integrity standards
- Supports customer's right and ability to share their own data



Unconsented Data Access – When & How

- Opt-out programs, building benchmarking, Commission authorized program, or utility operational needs.
- Privacy Protections: Aggregation, anonymization, and privacy screens.
- Balance usefulness with customer privacy.

Regulatory Considerations for Data Access



CONSUMER ADVOCATE CONCERNS

- Explicit consent – privacy should be the default
- How consent is obtained
- Scope of consent and retracting consent
- Responsibilities of third parties
- Oversight by Commission and liability for disclosure

QUESTIONS?

Please use the Q&A feature in your Zoom Toolbar

Next Webinar in the Data Access Series

Data Access Policy Tools

September 15, 2025 | 2:00 ET | Open to state agency staff | Register now!

This webinar will look at tools regulators, policymakers, and utilities are using to develop more robust policies around data access. It will leverage the results of NARUC research collecting requirements, policies, and guidance from state utility commission data-sharing decisions and dockets. Particular attention will be paid to how regulatory requirements have been designed in the past, how regulators are considering new approaches to resolve historically low uptake of data tools, and their ability to drive program enrollment. Experts and practitioners will draw on parallel industries including open banking (i.e., a system of allowing access and control of consumer banking and financial accounts through third-party applications) to discuss the pros and cons of certain kinds of regulatory and performance requirements. The webinar will also discuss challenges regulators face and skills that may be valuable in tackling data access questions, both incrementally and systematically.

NARUC
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Thank You

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https://www.naruc.org/