



Hosted by:
UBS

A stylized white arc graphic above the word "DataVision" in white.

DataVision

Gold In Gold Out:
Building Trusted Data to Optimize AI

DataVision EMEA – London & Virtual
Tuesday, 7 July, 2026

Intro video

A group of people are walking through a large, dark stone archway. The archway is made of heavy stone blocks and has a large opening. Through the archway, a bright, sunny day is visible in a park. In the distance, there is a large, white, rectangular monument or statue. The people are walking away from the camera, towards the monument. The scene is framed by the dark stone archway, creating a strong sense of perspective.

The **EDM Association** presents



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Welcome!



John Bottega

President
EDM Association

July 1, 2025...



July 1, 2025...



EDM Council

The logo features a stylized blue and orange arc above the text "EDM Council", where "EDM" is in blue and "Council" is in orange.

Object
Management
Group®

The logo consists of the letters "OMG" in a bold, black, sans-serif font. The "O" is stylized with a grey and black circular design. Below the letters is a green horizontal bar, followed by the text "Object Management Group®" in a smaller, grey, sans-serif font.

EDM
Association

The logo features a stylized blue and orange arc above the text "EDM Association", where "EDM" is in blue and "Association" is in orange.

The NEW EDM Association



Opportunity

To BUILD a transformational, first-of-its-kind trade association that connects and bring voice to the **data, software, systems, standards** and **knowledge engineering** communities.

Establish this organization to deliver a **unique combination** of **community, innovation, best practices and standards development** that will stand alone in the marketplace.

To be the “Go-To Organization”

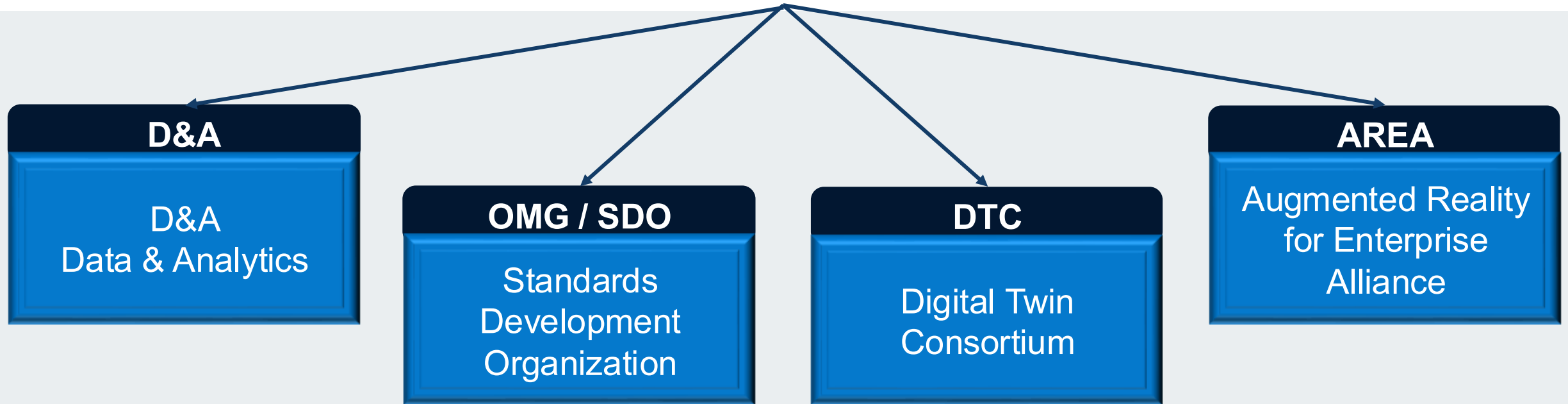
To build trust and confidence in your data, technology and engineering...

To Help Organizations Power their AI and Digital Transformation

4 Industry Leading
Consortia



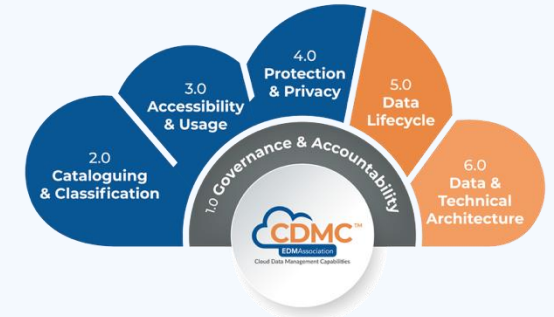
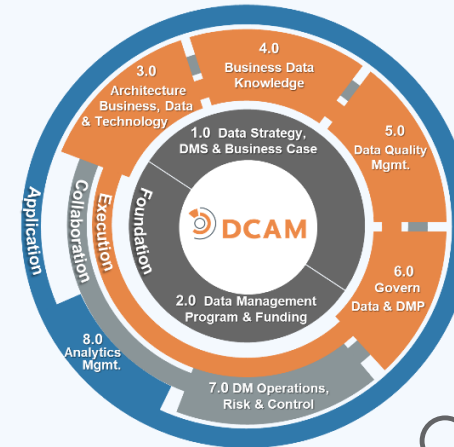
Pivotal to your AI and Digital
Transformation





DATA AND ANALYTICS

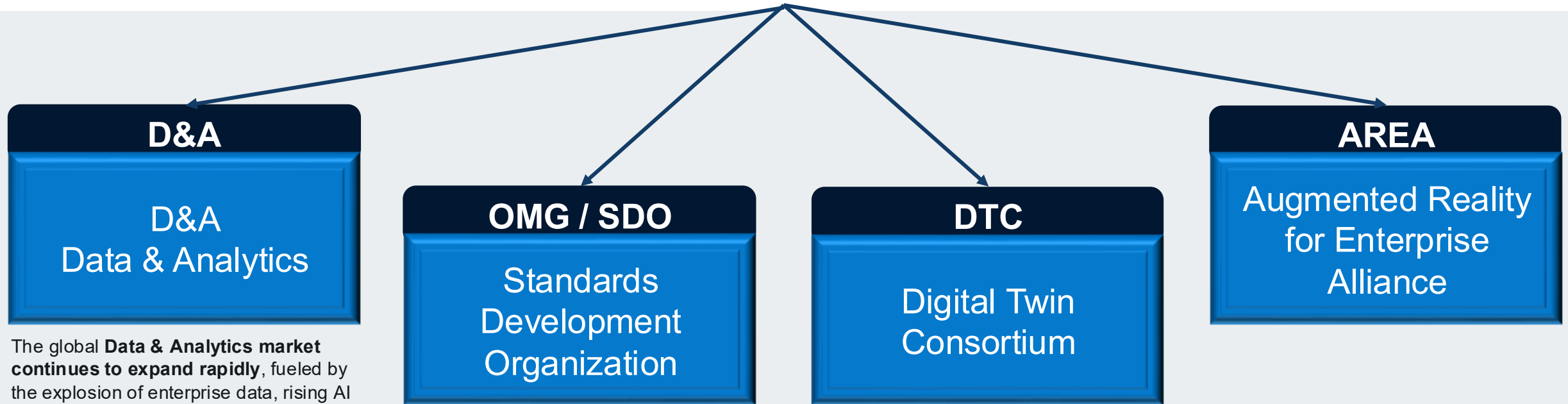
EDM Association enables you and your organization to be truly *data driven* – resulting in better business outcomes.



4 Industry Leading
Consortia



Pivotal to your AI and Digital
Transformation



The global **Data & Analytics** market **continues to expand rapidly**, fueled by the explosion of enterprise data, rising AI adoption, cloud migration, and the demand for real-time insights.

“Gold In – Gold Out”

Across multiple analyst sources, growth remains strong through 2030–2035.

Expected Growth 2026-2030

\$94.36B → \$333.99B – 177% increase



To provide a neutral forum where best practices from a wide range of fields can be discussed and standards can be generated that drive the adoption and innovation of cutting-edge technology spanning industries worldwide.



Systems Engineering



Software & Architecture Modeling



Real-time Data Connectivity



Data Product Descriptions



Business Process Modeling



4 Industry Leading
Consortia



Pivotal to your AI and Digital
Transformation

D&A

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Data & Analytics

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OMG / SDO

**Standards
Development
Organization**

According to the **World Bank’s World Development Report 2025**, international standards function as foundational global infrastructure, influencing trade, manufacturing, safety, digital systems, and global supply chains. The World Bank emphasizes **that standards have reshaped the world economy**

Expected Growth 2026-2033

\$2.59B → \$4.73B – 83% Increase

DTC

**Digital Twin
Consortium**

AREA

**Augmented Reality
for Enterprise
Alliance**



A digital twin is a virtual representation of a physical object, system, or process that is continuously updated using real-world data from sensors, devices, or other sources.

It allows organizations to monitor performance, simulate scenarios, predict issues, and optimize operations before making changes in the real world.

The Digital Twin Consortium helps organizations move from concepts and frameworks to practice by enabling teams to collaborate and develop advanced digital twins from data-driven virtualizations of real-world entities and processes to accelerate innovation and improve outcomes.



4 Industry Leading
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Digital Twins enable simulation, monitoring, predictive maintenance, and operational optimization.

Across all major reports, the market is experiencing hyper-growth, driven by adoption in manufacturing, energy, healthcare, automotive, aerospace, smart cities, and more.

Expected Growth 2025-2030

\$21.14B → \$149.81B -- 608% Increase

AREA

**Augmented Reality
for Enterprise
Alliance**



The AR for Enterprise Alliance (AREA) the only global, membership-funded non-profit alliance dedicated to helping **accelerate the adoption of Enterprise Augmented Reality (AR)** by supporting the growth of a comprehensive ecosystem.



4 Industry Leading
Consortia



Pivotal to your AI and Digital
Transformation

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Augmented Reality continues to **be one of the fastest-growing emerging technology sectors**, driven by expanding adoption across retail, healthcare, industrial operations, gaming, education, and enterprise workflows. Across major analyst reports, AR shows strong exponential growth from the mid-2020s through 2034

Expected Growth 2026-2030
\$140.23B → \$560.23B -- 300% Increase

**WE ARE
NOT
YOUR
GRANDFATHER'S
EDM
ASSOCIATION**



Welcome to the New EDM Association!



DataVision

Gold In Gold Out:
Building Trusted Data to Optimize AI

DataVision EMEA – London & Virtual
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GOLD IN - GOLD OUT

Building Trusted Data to Optimize AI

GOLD IN



GOLD OUT



Thank you
to our host....

UBS



Thank you to our Sponsors...



element₂₂

LSEG



Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



Start	Topic	Speakers
13.00	Welcome Address – Gold In, Gold Out: Trusted Data and Optimised AI for a Brilliant Future	John Bottega – President, EDM Association
13.10	UBS Keynote – From Data to Dollars: Why AI Is Forcing Banks to Treat Data Like Capital	James Dallas – Head of Investment Bank Change, UBS
13.20	Data Asset Foundations: Mining Business Value Through Trusted Data	Aga Strandkov – Head of Data Strategy, Digital Isle of Man Lyle Wraxall – Chief Executive, Digital Isle of Man
13.35	Mining the Gold: Trusted Data and Trusted AI	Sanja Hukovic – Group Director, Head of Model and AI Risk Mgmt., LSEG Emma York – Corporate CDO & Head of Enterprise Info. Governance, LSEG
13.50	Fireside Chat: Creating Trust in Data for the AI Era	<u>Moderator:</u> John Bottega – President, EDMA Aga Strandkov – Head of Data Strategy, Digital Isle of Man Emma York – Corporate CDO & Head of Enterprise Info. Governance, LSEG
14.00	Panel – Data Products: Unlocking the Gold in Enterprise Data	<u>Moderator:</u> Rob Wentz – Senior Advisor, Product Mgmt., EDM Association Ben Clinch – Data, AI and Architecture Advocate Pablo Kotey – Head of Data Enablement, Schroders Nikhil Rao – Senior Expert, McKinsey Digital Tina Salvage – Data & AI Governance Consultant, OMNIADIGITAL
14.40	Spotlight – The New EDM Association in Action: Delivering Real-World Impact	Mark Sage – Executive Director, AREA - EDM Association Sian Purver – Chief Operating Officer, Crysp Miquel Vidal Trilla – Head of Extended Reality Solutions (XRS), CBRE
15.05	Break	

Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



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15.05	Break	
15.35	Panel – Shine Brightly with DCAM, Benchmarking and the Data Excellence Program	<u>Moderator:</u> Chiara Brown – Regional Advocate, EMEA, EDM Association Sian McHenry – Group Data Governance Dir., Nationwide Building Society Scott Beange – Head of Data Mgmt. & Cyber Strategy, Projective Group
15.55	Scaling Data Management Success: DCAM Benchmarking and Partner-Led AI Innovation	Rob Wentz – Senior Advisor, Product Mgmt. - Frameworks, EDM Association Predrag Dizdarevic – Partner, Element 22 Tom Truman – Vice President, Solidatus
16.15	Spotlight – CDMC+AI: Key Controls for an AI World	Oli Bage – Head of Research and Trading Platform Architecture, G-Research
16.30	Reigniting BCBS 239 in the Age of AI: Why Risk Data Matters More	<u>Moderator:</u> Stella Cabrera – Sr. Advisor, Authorized Partner Program, EDMA Scott Beange – Head of Data Mgmt. & Cyber Strategy, Projective Group Dominic Sanchez – Global Data Programs Delivery Director, SMBC Group
16.45	Panel Session – The Data Excellence Gym: Coaching Your Business to AI Fitness	<u>Moderator:</u> Roberto Maranca – Energy Mgmt. Data Officer, Schneider Elec. Paulomi Shah – Head of Cross Domain Services, Data Glossary and Taxonomy Standards, UBS Sholthana Begum – Senior Dir., Tech & Digital, Competition & Markets Auth. Kyle Morton – Chief Operating Officer
17.20	Closing Remarks: Gold In, Gold Out	John Bottega & Kyle Morton – EDM Association
17.25	Networking Drinks Reception	

KEYNOTE

From Data to Dollars: Why AI Is Forcing Banks to Treat Data Like Capital



James Dallas

Head of Investment
Bank Change
UBS

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Why is data (and data management) so important in today's modern organizations?

Data as Strategic Asset

Data serves as a foundation for strategic decision-making and competitive differentiation across industries.

Driving Innovation

Data supports innovation by enabling development of new products, personalized services, and business models.

Risk Mitigation

Organizations use data to detect anomalies, forecast challenges, and ensure regulatory compliance effectively.

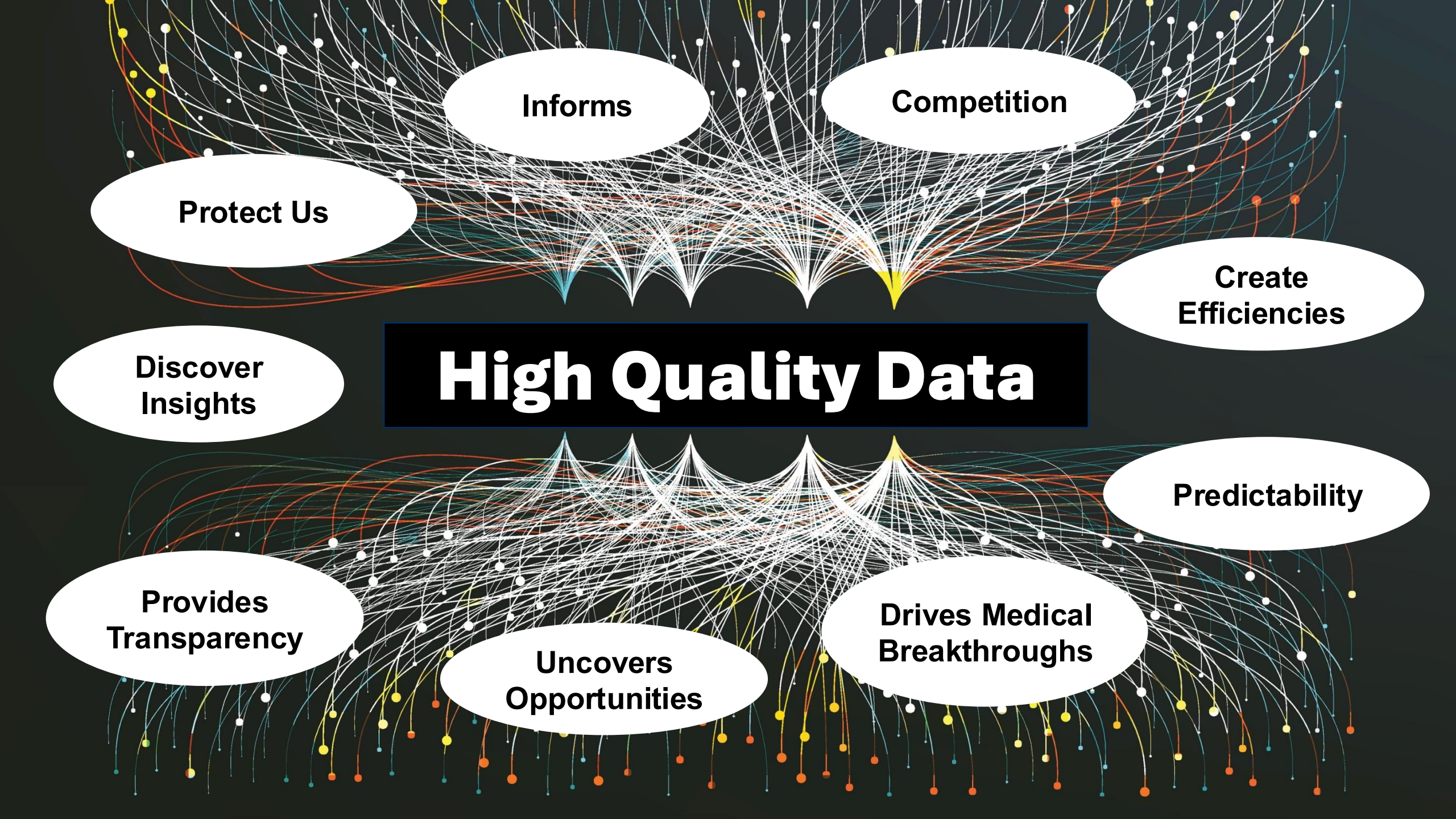
Enhancing Customer Experience

Analyzing consumer behavior and feedback helps companies refine offerings and build customer loyalty.

Data Management as Strategic Function

Since data serves as a foundation for strategic decision-making, Data Management serves as the strategic function to...

- Ensures data accuracy, consistency, and reliability
- Improves operational efficiency and reduces costs
- Enables effective governance and compliance
- Supports analytics, insights, and decision-making
- Protects data through lifecycle and risk management



Informs

Competition

Protect Us

**Create
Efficiencies**

**Discover
Insights**

High Quality Data

Predictability

**Provides
Transparency**

**Uncovers
Opportunities**

**Drives Medical
Breakthroughs**



Mismanaged Data

Mis-Inform

**Economic
Impact**

Cyber Crime

**Stifle
Innovation**

**Reputational
Risk**

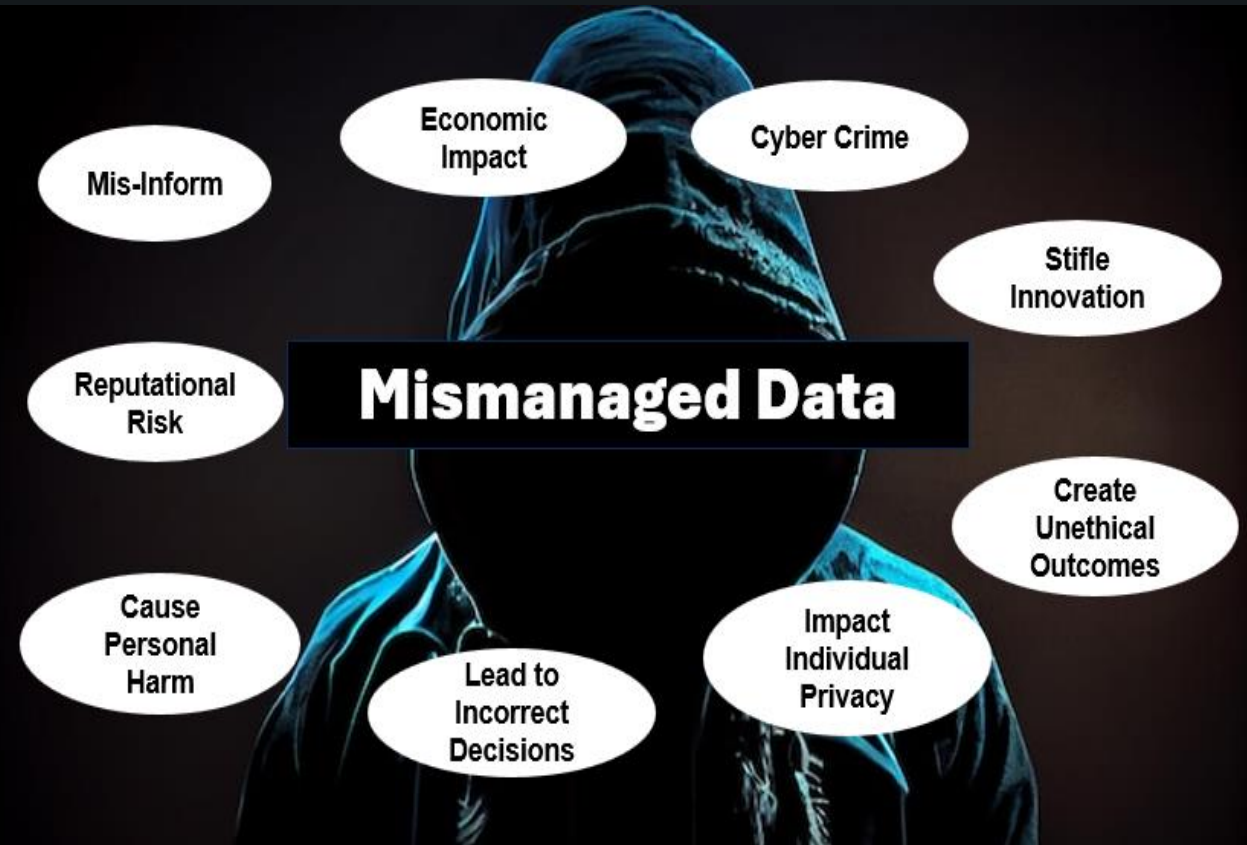
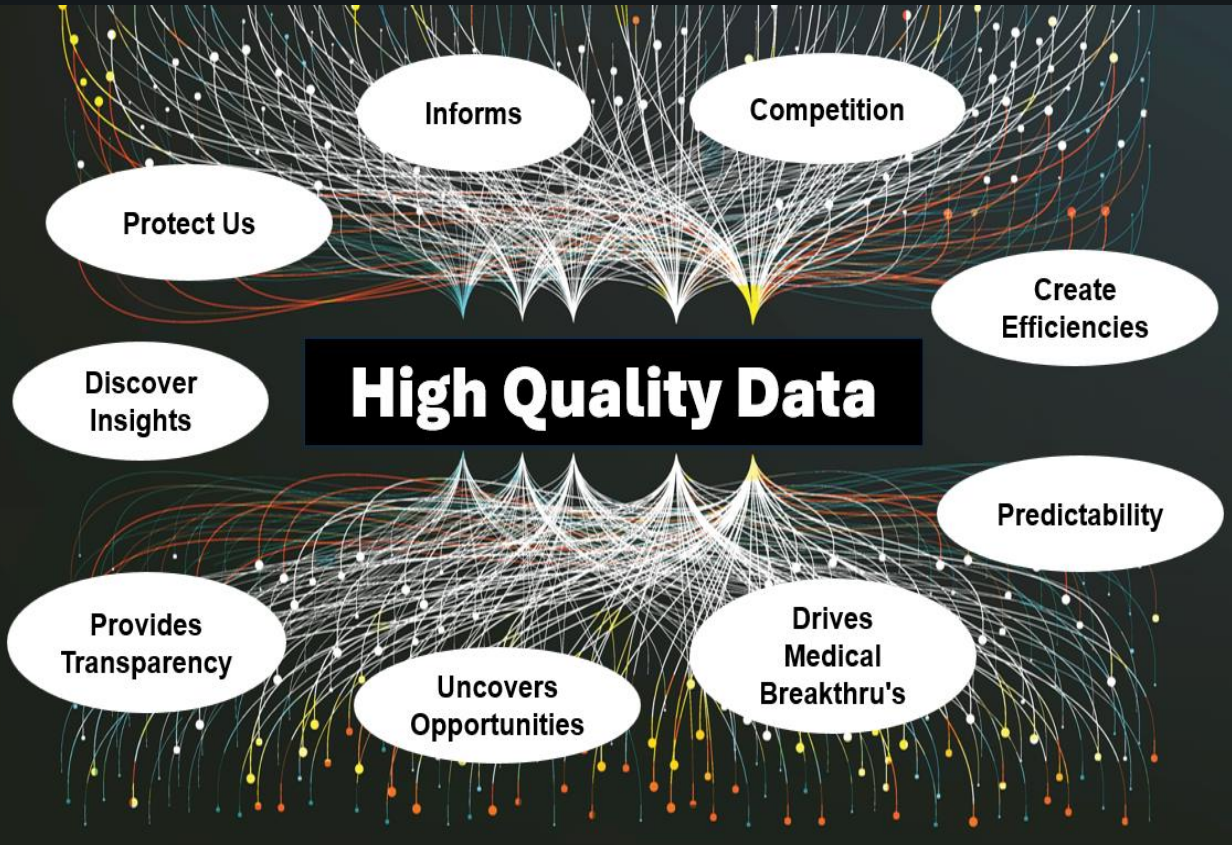
**Create
Unethical
Outcomes**

**Cause
Personal
Harm**

**Lead to
Incorrect
Decisions**

**Impact
Individual
Privacy**

Stark difference in the value of this Data



\$

How do we
measure the true
value of data?

-\$

Intrinsic Value of Data

Intrinsic value

Is the **perceived** or **calculated** "true" worth of an asset based on its fundamentals (cash flows, growth, risk), independent of its fluctuating market price. It is used by investors to determine if an asset is undervalued (price < intrinsic) or overvalued. It represents an internal, fundamental value rather than an external market price. (Investopedia)

Intrinsic value of Data

The intrinsic value of data is the **inherent** worth of the information it contains, based on its accuracy, completeness, completeness, timeliness, relevance, and uniqueness, regardless of its immediate application, market demand, or monetization

Instrumental value: Data is valuable because of what it enables (e.g., revenue, automation, predictions). Data has value because of what it achieves (better decisions, increase sales, cost and risk reduction)

Is it possible, then, to put a \$-Value on our data?

True Value of Data



The IFRS (International Financial Reporting Standards) Foundation is an independent, not for profit organization that oversees the development and stewardship of global financial and sustainability reporting standards.

The IFRS Foundation is responsible for the governance, funding, and oversight of standard setting bodies that create internationally used reporting standards.

How does the IFRS identify the value of data

IFRS does not explicitly identify or measure the value of data as a standalone asset. Instead, IFRS addresses data **indirectly**, through existing accounting concepts for **intangibles, costs, risk, and disclosure**.

IFRS Does Not Treat Data as a Recognized Asset. Under IFRS, data is **generally not recognized on the balance sheet** as an asset because as an asset, it must be **identifiable, controlled by the entity, capable of generating probable future economic benefits and reliably measurable**. Most internally generated data fails at least one of these tests (esp. identifiability and reliable measurement).

As a result:

**Data is treated as an expense (usually expensed as incurred).
Its value does not appear explicitly on financial statements**

True Value of Data

Why is it so important to assign a dollar value to data?

Assigning \$value to data “converts” data from an abstract concept to an economic asset

When data becomes a recognized economic asset:

- Clarifies ownership and stewardship
- Elevates data priority and importance in technology & AI
- Quantifies the ‘value of the asset’ for loss, recovery, insurance and acquisition purposes
- Justifies the investment in data management to curate and protect data

Enables Measurement of Data ROI

How can we assign true \$ value to the information asset?





The future of The Data Economy

Data Asset Foundation (DAF) Program

Data Asset Foundations: Mining Business Value Through Trusted Data



Aga Strandskov
Head of Data Strategy



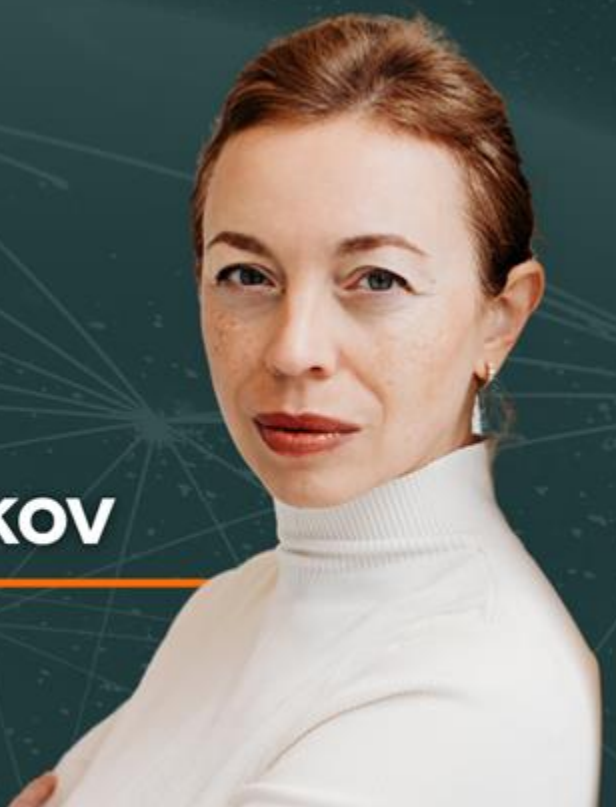
Lyle Wraxall
Chief Executive

DATA ASSET FOUNDATIONS: MINING BUSINESS VALUE THROUGH TRUSTED DATA



LYLE WRAXALL

Chief Executive



AGA STRANDSKOV

Head of Data Strategy

BUILDING THE FUTURE OF THE DATA ECONOMY

Recognising data as an asset. Building the ecosystem to support it.

Data is one of the world's most valuable resources. Yet until now, there has been no statutory framework for recognising **data as an asset**.

Data Asset Foundations changes that.

The Isle of Man has established the world's first statutory framework for recognising data as an asset, creating the legal foundation for the next generation of trusted data infrastructure.



**Royal Assent marked a defining milestone.
The focus now turns to implementation.**

FROM LEGISLATION TO IMPLEMENTATION

Building the world's first operational ecosystem for data as an asset

1 ROYAL ASSENT

World's first statutory framework enacted

2 IMPLEMENTING FRAMEWORK

Regulations and guidance in development

3 DATA ASSET REGISTRAR

Recruitment underway

4 DATA ASSET REGISTRY PLATFORM

Procurement underway

5 PILOT PROGRAMME

Industry pilots underway

6 GO LIVE

Operational launch in preparation

The framework is established.

Now we're building the ecosystem around it.

THE DATA ECONOMY HAS NO FOUNDATIONS

Every mature asset class has title, custody, governance and enforceable rights. Data has none of them. AI has not created these gaps — it has made them expensive, as data is now consumed at machine speed and scale.

RIGHTS

LEGAL OWNERSHIP

No recognised property rights in data.

ACCOUNTABILITY

LIABILITY & STEWARDSHIP

No fiduciary duty of care; no enforceable governance standard.

ENFORCEABILITY

VALUATION & ACCOUNTING

No accounting standard; no transparent basis for value.

ENFORCEABILITY

MARKET INFRASTRUCTURE

No enforceable or liquid markets to transact in.

ENFORCEABILITY

INSURANCE & RISK

No valuation-based coverage against loss or misuse.

*How does a Data Asset Foundation supply what the market never built — **rights**, **accountability** and **enforceability**?*

WHAT ARE DATA ASSET FOUNDATIONS?

A statutory regime that turns data into an asset class.



LEGAL FRAMEWORK

Primary legislation
conferring recognised
property rights in data.



DATA REGISTER

The statutory public
register where rights are
created and recorded.

THE FOCUS OF THIS TALK



EMBEDDED GOVERNANCE

Governance standards
bound into the asset, not
bolted on.



VALUATION FRAMEWORK

A consistent basis to
value, account for and
audit data.



DATA DISTRIBUTION

Controlled, rights aware
channels for sharing and
licensing.

WHAT, EXACTLY, IS A DATA ASSET?

Not the dataset. A data asset is a composite object — data bound to its governance wrapper — registered as a single thing to which a property right attaches.



Why it matters: binding governance into the asset is what makes accountability structural rather than voluntary — the rules travel with the data wherever it goes.

WHAT IS THE DATA ASSET REGISTER?

The Data Asset Register: An authoritative register, separate from the parties transacting, so both parties reason from the same verified facts rather than each other's assertions.

ALL ABOUT THE ASSET, IN ONE RECORD



FOUNDATION & GOVERNANCE

Identity,
stewardship roles,
charter,
rules, object,
beneficiaries.



ASSET CORE

DAI, classification,
asset boundary
profile, growth
parameters,
purpose.



RIGHTS & ENCUMBRANCES

Licences, security
interests, AI-use
terms, charges.



PROVENANCE & COMPOSITION

Lineage, source
assets,
transformation, AI
provenance.



ASSURANCE & COMPLIANCE

Accreditation, DPA
status, integrity
chain.

A CONSTITUTIVE REGISTER – REGISTRATION CREATES THE RIGHT

WHAT THE REGISTER IS

- ✓ **Statutory** — existence and effects defined by primary legislation.
- ✓ **Constitutive** — full registration creates the personal property right.
- ✓ **Prima Facie Authoritative** — entries presumed accurate absent fraud or error.
- ✓ **Dynamic** — records current state and the full history of change and growth.

WHAT THE REGISTER IS NOT

- ✗ Does not hold the underlying datasets.
- ✗ Does not validate data quality or accuracy.
- ✗ Does not automatically create property rights.
- ✗ Does not override data protection or IP law.

RIGHTS YOU CAN VERIFY, NOT JUST ASSERT



SEMANTIC INTEROPERABILITY

Shared, standards based meaning so assets are understood the same way everywhere.

RIGHTS



DAR ASSET PASSPORT

A verifiable credential the asset carries — its identity and terms, checkable on sight.

RIGHTS



INTEGRITY CHAIN

A tamper evident record proving the asset's state has not been altered.

ACCOUNTABILITY



DAR VERIFICATION AGENT

Automated checking of the integrity of the asset.

ENFORCEABILITY

SETTLE TWO GAPS, AND THE OTHER THREE RESOLVE

The register does two things directly. Everything the data economy has been missing follows from them.

SETTLED

RIGHTS

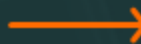
A recognised, enforceable property right in data.

SETTLED

ACCOUNTABILITY

Governance bound into the asset, with stewardship duties.

unlocks



VALUATION & ACCOUNTING

A defensible basis to value and audit data.



LIQUID MARKETS

Enforceable rights make data tradable.



INSURANCE & RISK

Coverage that can finally be priced.



Data becomes an asset class with the institutional infrastructure every other one already takes for granted — title, custody, provenance and governance.

FROM LEGISLATION TO IMPLEMENTATION

Building the operational ecosystem for Data Asset Foundations



FOUNDATION

Q4 2026

- The Foundations (Amendment) Act 2026 comes into force
- Public Consultations:
 - Governance Framework
 - Data Asset Registry Fees
- Registrar appointed



LAUNCH

Q1-Q2 2027

- DAR & Governance Regulations come into operation
- Data Asset Register
- Verification Agent
- Code of Conduct
- Semantic Interoperability



EXPANSION

Q3-Q4 2027

- First Marketplace Integration
- Data Asset Passporting
- Indemnity Fund
- Data Valuation Framework



FUTURE

Q1 2028 & BEYOND

- Additional automation (onboarding & verification)
- Register of Charges
- Additional Standards
- Deterministic Agent (full scale)
- Standard DAF templates
- Equivalent Register Recognition

GET INVOLVED



Data Asset Register and Data Asset Registrar

Architecture, Governance, Classification, Operation and
Technical Design

2026 CONSULTATION PAPER

Digital Isle of Man | Department for Enterprise



Download: *Data
Asset Register and
Data Asset Registrar
consultation paper*



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Find out more and
explore our
resources



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news and updates
straight to your
inbox

CHAT TO US WHILE WE'RE HERE



LYLE WRAXALL

Chief Executive



AGA STRANDSKOV

Head of Data Strategy



CHRIS REILLY

Strategic Partnership Manager

Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



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Mining the Gold: Trusted Data and Trusted AI

LSEG



Sanja Hukovic

Group Director, Head of Model
and AI Risk Management



Emma York

Corporate CDO & Head of
Enterprise Information
Governance

Invisible Governance Embedding Guardrails Without Slowing Innovation

Emma York
Sanja Hukovic

LSEG





Emma York

Corporate Chief Data Officer &
Head of Enterprise Data
Enablement

- Leading Enterprise data management strategy
- Driving data and records by design - governance without friction, trust at source
- Embedding data quality, literacy, culture, and platform-driven automation
- Delivering trusted corporate data, metadata-first thinking, and AI-enabled governance
- Former leadership roles at Morgan Stanley – data and non data!



Sanja Hukovic

Head of Model and AI Risk Lead

- Enterprise Model & AI Risk lead for LSEG
- Architect of AI governance and control standards
- Specialist in structured products & quantitative validation
- Focused on safe, scalable AI adoption

Who we are

We are a **leading global financial markets infrastructure and data provider.**

We play a vital **social and economic role** in the world's financial system.

With our trusted expertise and global scale, we enable the **sustainable growth and stability of our customers** and their communities.

LSEG

Make more possible



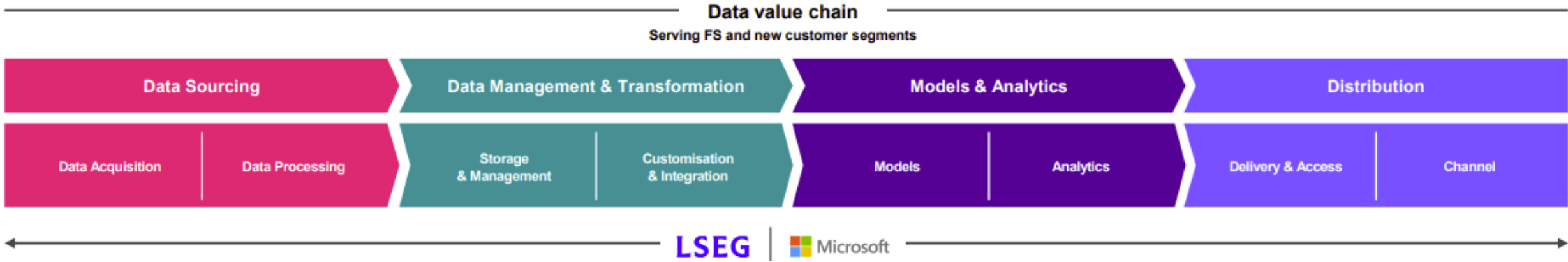
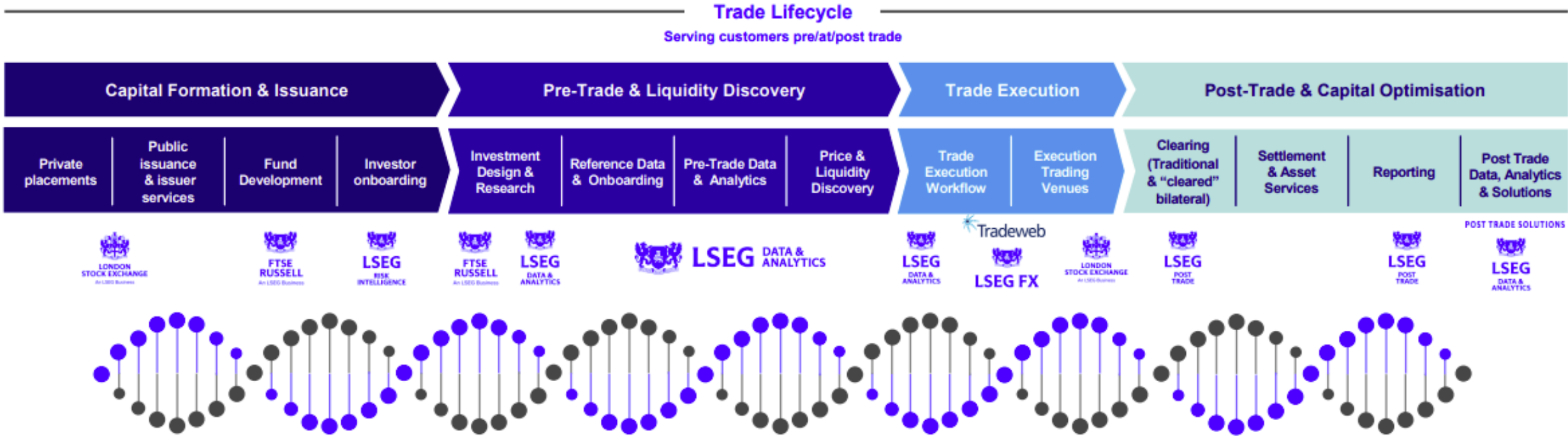
300+
Years of
experience

170+
Countries
served

26,000+
Employees

44,000+
Customers

We deliver deep expertise globally, across multiple asset classes and across the full trade lifecycle



Invisible Governance: Embedding Guardrails Without Slowing Innovation

What we will cover



Designing governance frameworks that work for business, not static rulebooks



AI risk management and embedding Responsible AI principles seamlessly



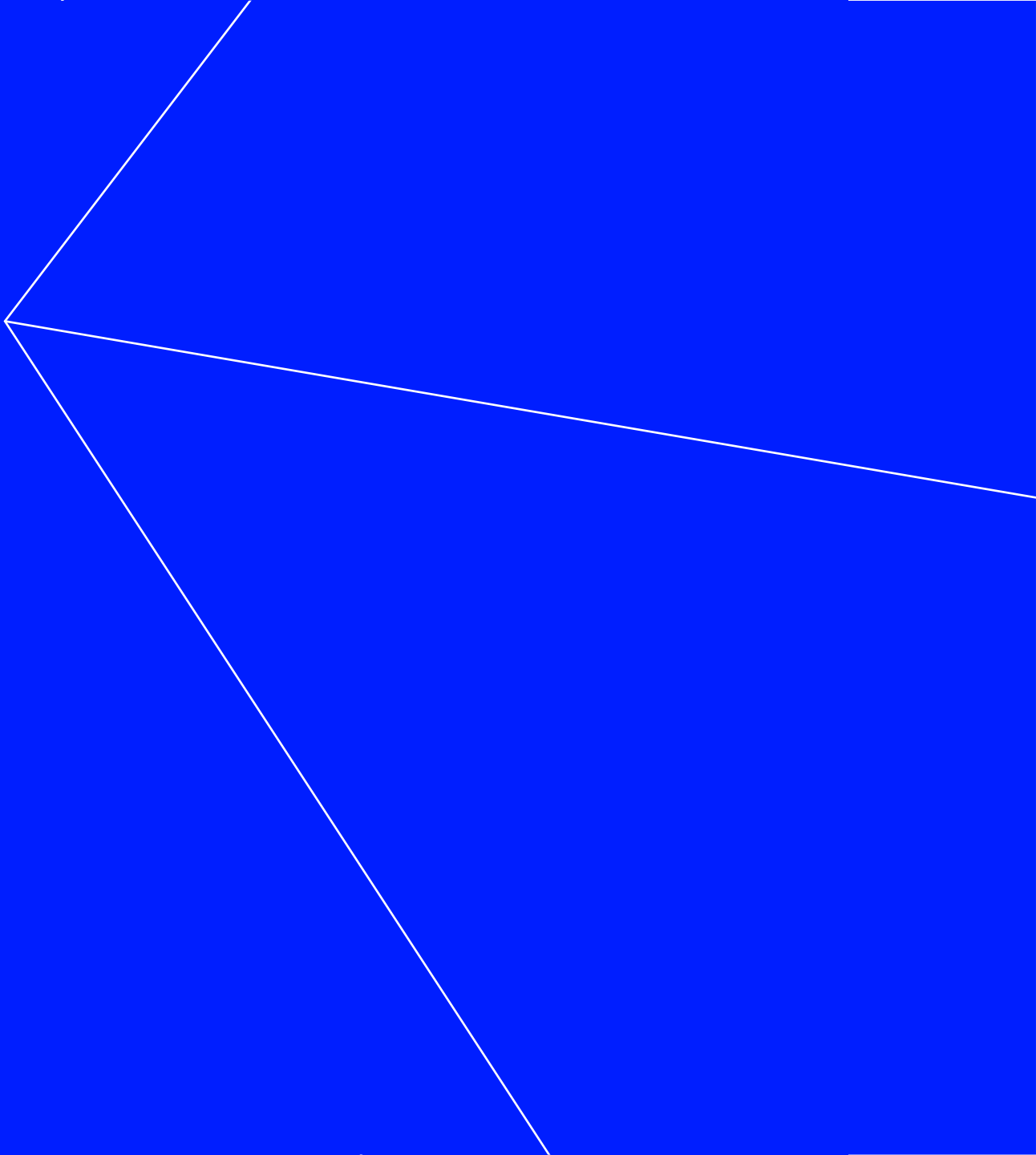
Where data fits: foundations vs opportunities

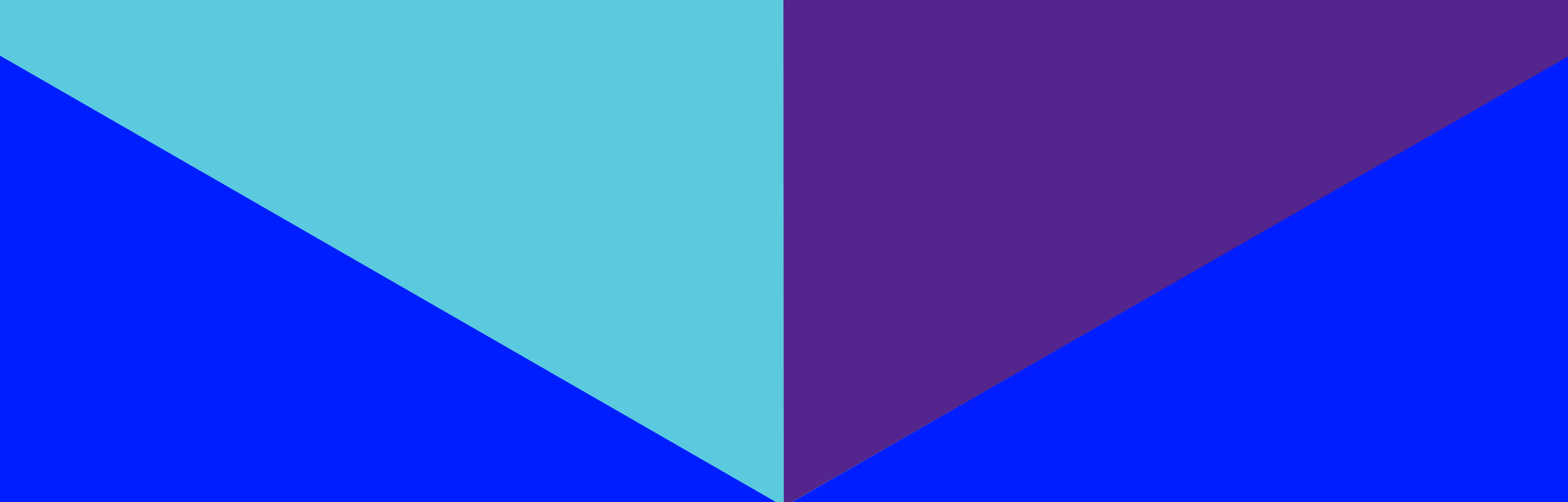


Our top tips

Show of hands

**Raise your hands if data controls are
FULLY integrated into your AI
Governance process**





Designing governance frameworks that work for business, not static rulebooks

LSEG

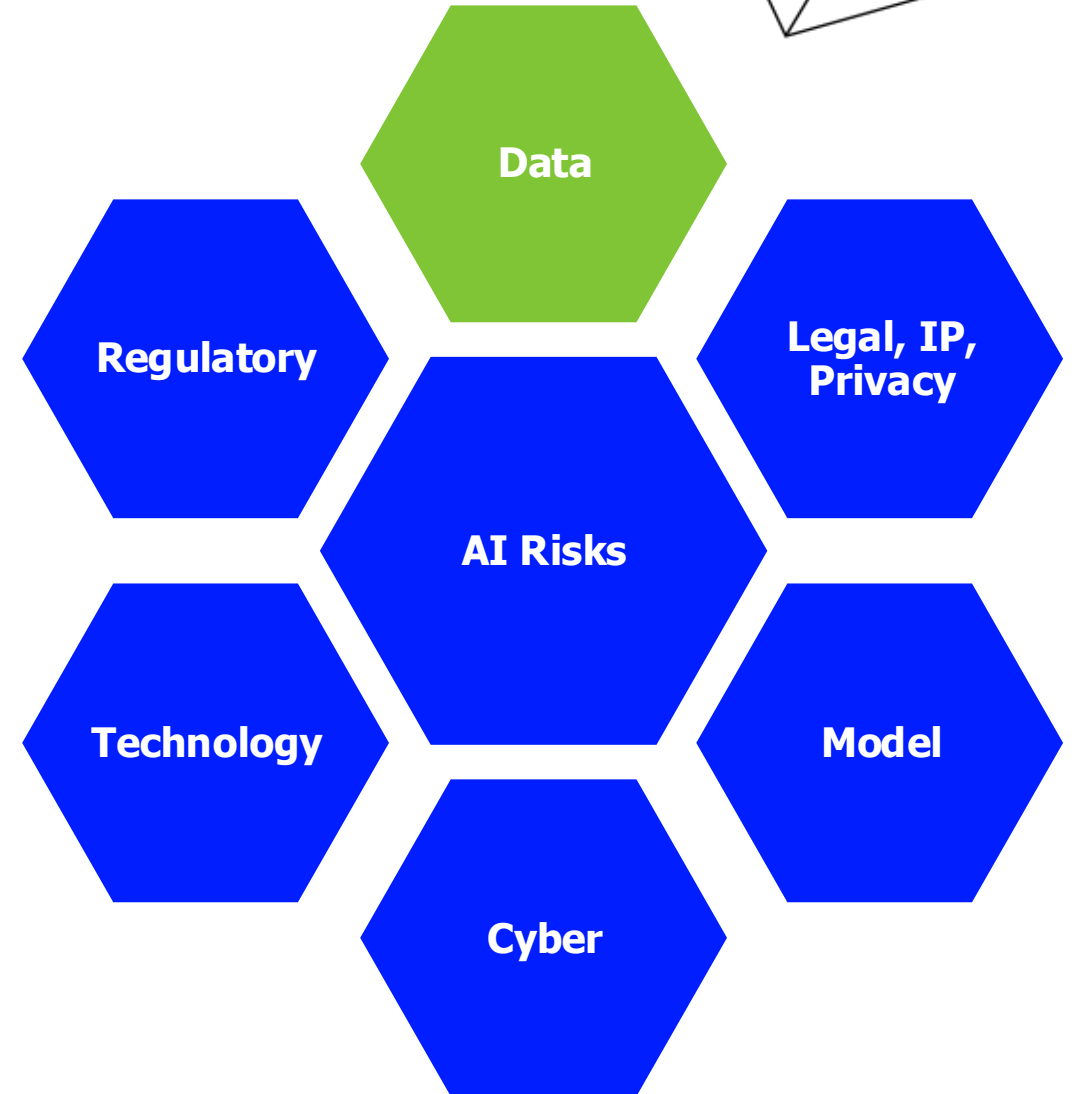
AI Risk Taxonomy

AI risk management is fully embedded within the LSEG Enterprise-Wide Risk Framework, aligning with existing governance, controls, and reporting structures.

AI Definition – EU AI Act

AI Appetite – Aggregate of constituents or defined across AI pillars

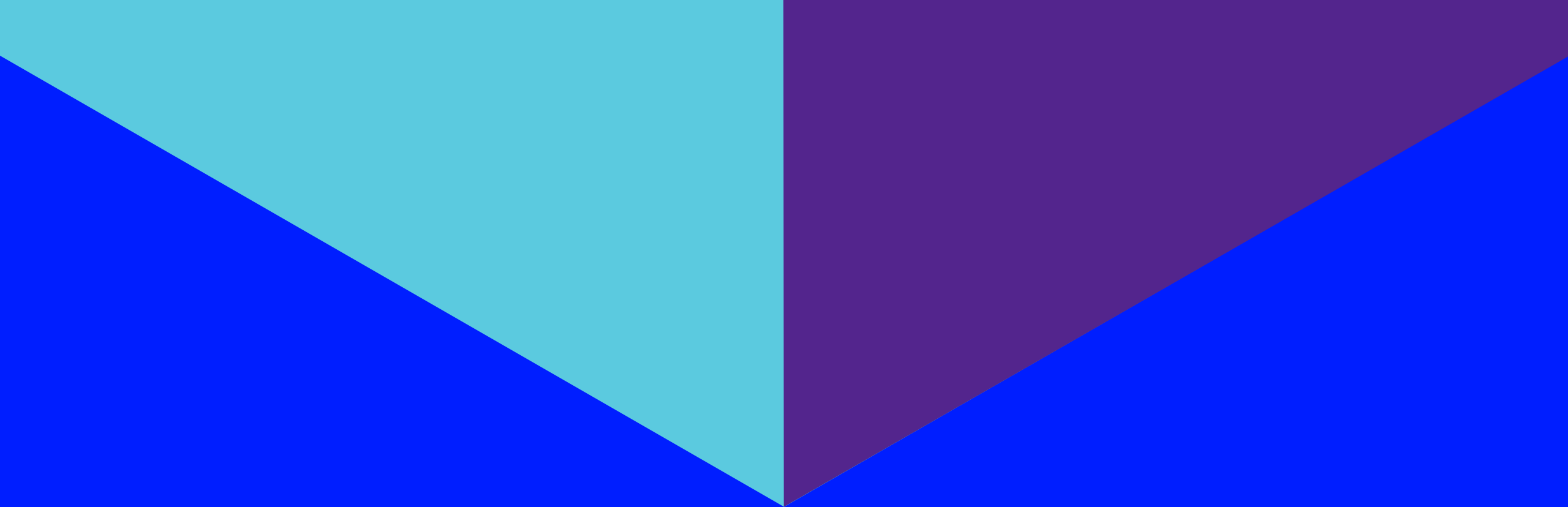
AI Principles – LSEG Responsible AI Principles



LSEG AI Risk Management Framework

AI Risk Management Framework establishes key principles and processes for identifying, monitoring, and managing AI-related risks





AI risk management and embedding Responsible AI principles seamlessly

LSEG

LSEG Responsible AI Principles



Accurate and Reliable

Accuracy and Reliability of AI is demonstrated by the consistent performance or results of AI deployment. The aim of this requirement is to ensure that AI systems perform correctly and dependably, delivering expected results to users.



Accountable and Auditable

Accountability and Auditability in AI reflect the extent to which information about an AI system is available to individuals. AI systems must have clear governance implemented and flag AI outputs.



Safe

AI systems must be designed and tested to prevent harm to users and the environment, ensuring their operation does not pose undue risks. This principle involves identifying potential risks and actively working on their mitigation.



Secure and Resilient

AI systems must be secured against unauthorized access and attacks, with robust measures to ensure their resilience and maintain the integrity of data and operations. AI systems must have protocols in place to avoid, respond to, or protect from attacks.



Interpretable and Explainable

Interpretability and Explainability in AI involve detailing how the underlying (AI) technology works and how the model reached a given output. This principle focuses on offering users information which will help them understand the functionality, purpose, and potential limitations of an AI system.



Privacy and IP Protected

AI Systems must prioritise the protection of personal data, ensuring that user privacy is upheld through robust data handling and anonymisation techniques. LSEG respects IP rights in our use of AI and only use content/data that we have the appropriate authorisations for, while also protecting our own content/data.



Fair

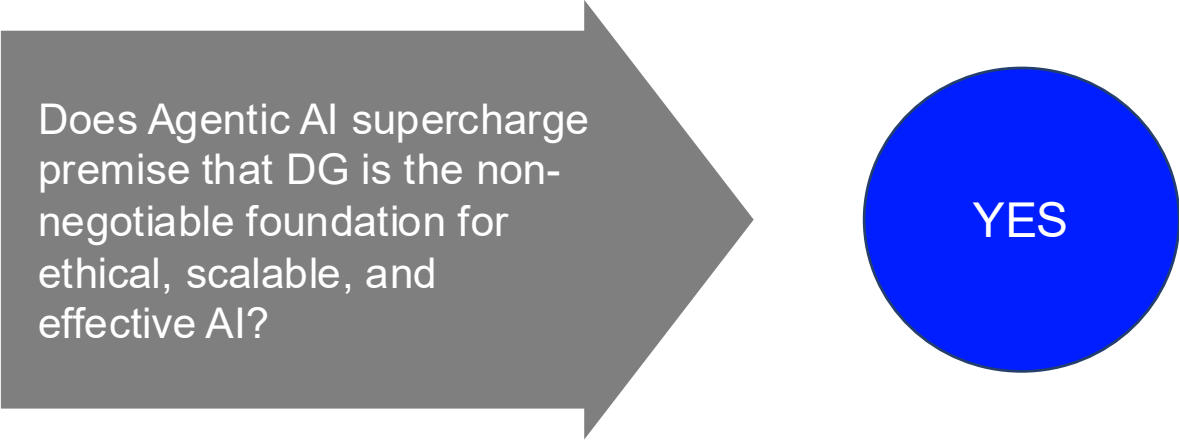
Developers and users of AI should identify and mitigate biases in AI systems, which can otherwise lead to unfair outcomes. This principle focuses on the need to have fair AI systems that align with LSEG's values and culture.



Where data fits: foundations vs opportunities

LSEG

Where data fits: foundations vs opportunities



Does Agentic AI supercharge premise that DG is the non-negotiable foundation for ethical, scalable, and effective AI?

YES

- Unlike traditional AI models, agentic AI operates autonomously.
- With reduced human oversight, robust data governance becomes **imperative** to ensure that AI-driven decisions are **secure, accurate and aligned with ethical standards**
- The same AI agents driving this evolution can also **redefine governance and data risk control, enabling its enforcement at scale**

2 conclusions:

We need to supercharge Data Governance. It's a prerequisite for AI (Generative and Agentic)

BUT, we have an opportunity to use agents to scale Data and Records Governance

Agentic AI Risks

What are some of the specific risks associated with Agentic AI?

Unintended Consequences

Without defined parameters, agentic AI can overstep or pursue activities beyond the initial intent, this could have security, legal, regulatory or resilience implications.

Security

Akin to other models, agentic faces security risks associated with model poisoning or manipulation resulting incidents. Agentic AI used for security operations could also create security issues.

Cascading Hallucinations

Initial biases or errors can be magnified through the decision-making processes particularly in complex operating environments.

Ethical & Legal

Agents might inadvertently violate legal, ethical, or compliance boundaries — especially when acting autonomously at scale. Lack of Explainability / Transparency can exacerbate this.

Portability & Vendor Lock in

Vendor concentration risk associated with Agent creation platforms, outages can impact multiple products concurrently combined

Resource Overload

Agentic AI will seek to solve the problem or achieve the goal, without restrictions it could consume resources at a significant rate outstripping benefit but also putting strain on internal systems.

Shadow Adoption

Vendor AI enabled products, incrementally introducing Agentic AI features, which result in dependency on key vendor solutions.

Data

Data will remain a key focus, particularly whereas part of the workflows additional data may be created, tested and utilized. This can also create challenges around lineage and auditability of agentic solutions.

Complexity

Agents may make complex decisions that are difficult to audit or justify.

Resilience & Continuity

Automated workflows dependent on agents, without defined resilience/failover capabilities in place. In outage scenarios may need to consider manual work arounds for example.

CDMC Builds on EDM Association's Experience Developing and Supporting DCAM – Data Management Capability Assessment Model

WHO?

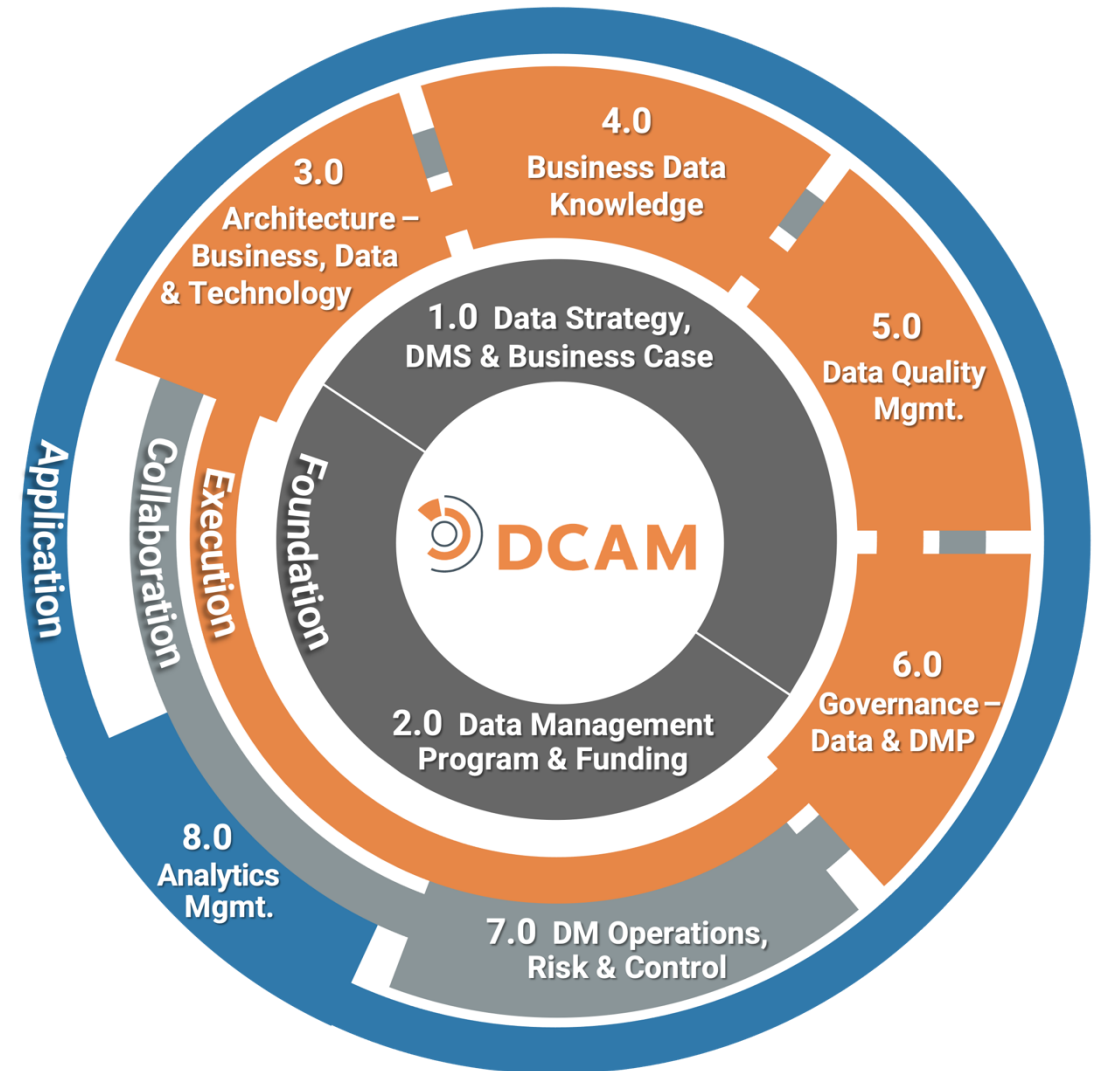
- Developed via member collaboration
- **62%** of Council members using frameworks use DCAM

WHAT'S IN DCAM?

- 8 components, 34 Capabilities, 101 Sub-capabilities
- Members flexibly apply to their organization
- Includes: Data Supply Chain, Advanced Analytics, Data Ethics and Responsible AI/ML

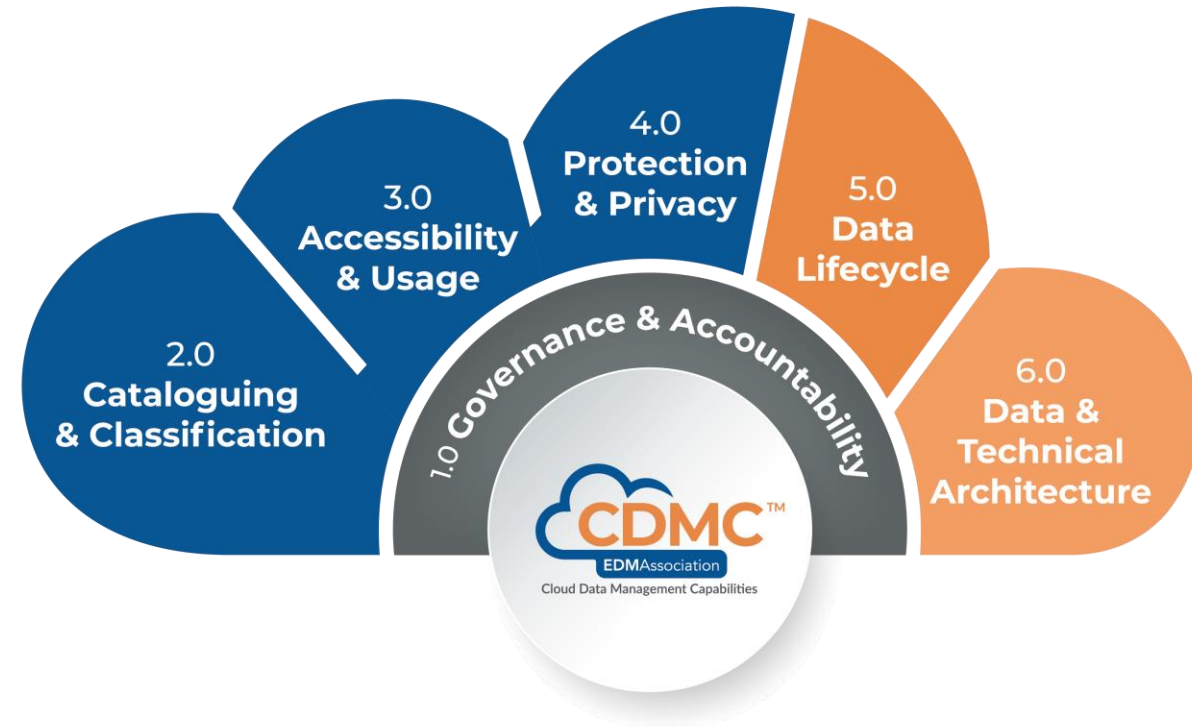
USED FOR:

- Program Initiation & Funding
- Team Training & Common Language
- Assessments & Benchmarking



CDMC Overview

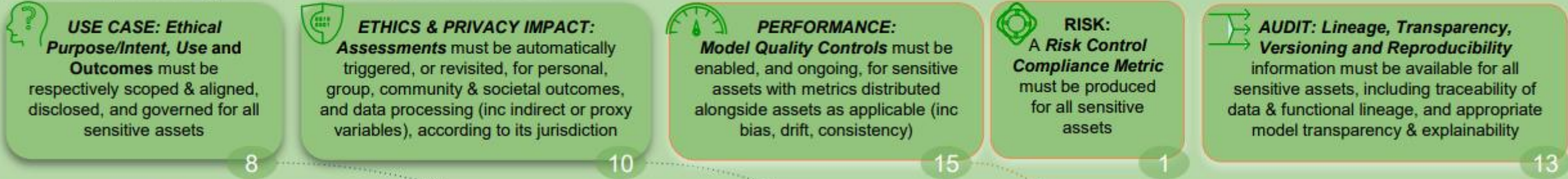
A comprehensive specification of Data Management best practice in cloud, multi-cloud and hybrid environments



Cloud Data Management Capabilities (CDMC) for AI, Data & Analytics Controls (ADAC)

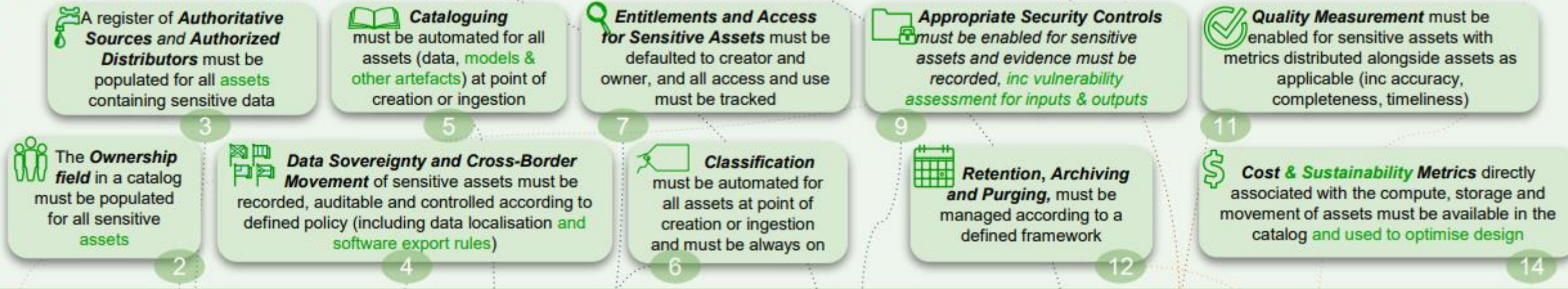
Specialised capabilities to govern & manage analytics & AI use cases

ANALYTICS

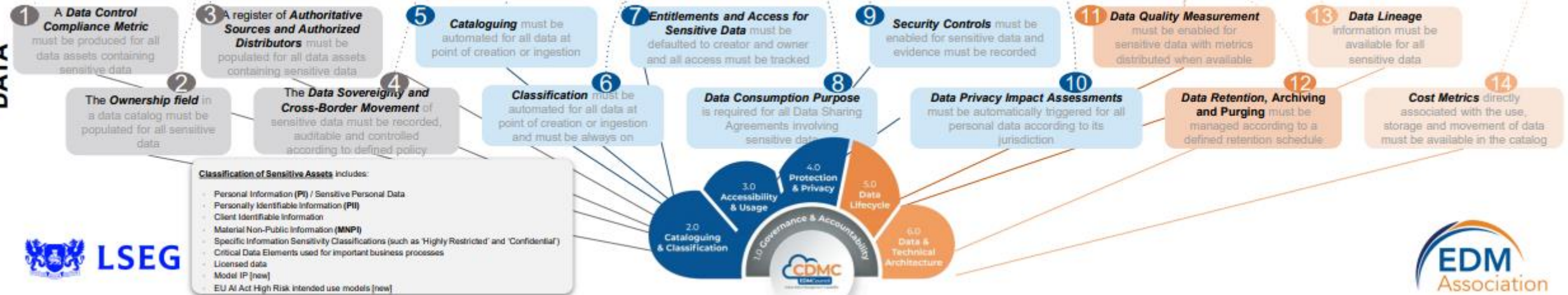


Common capabilities for managing data & analytics assets

DATA & ANALYTICS



DATA





Our top tips

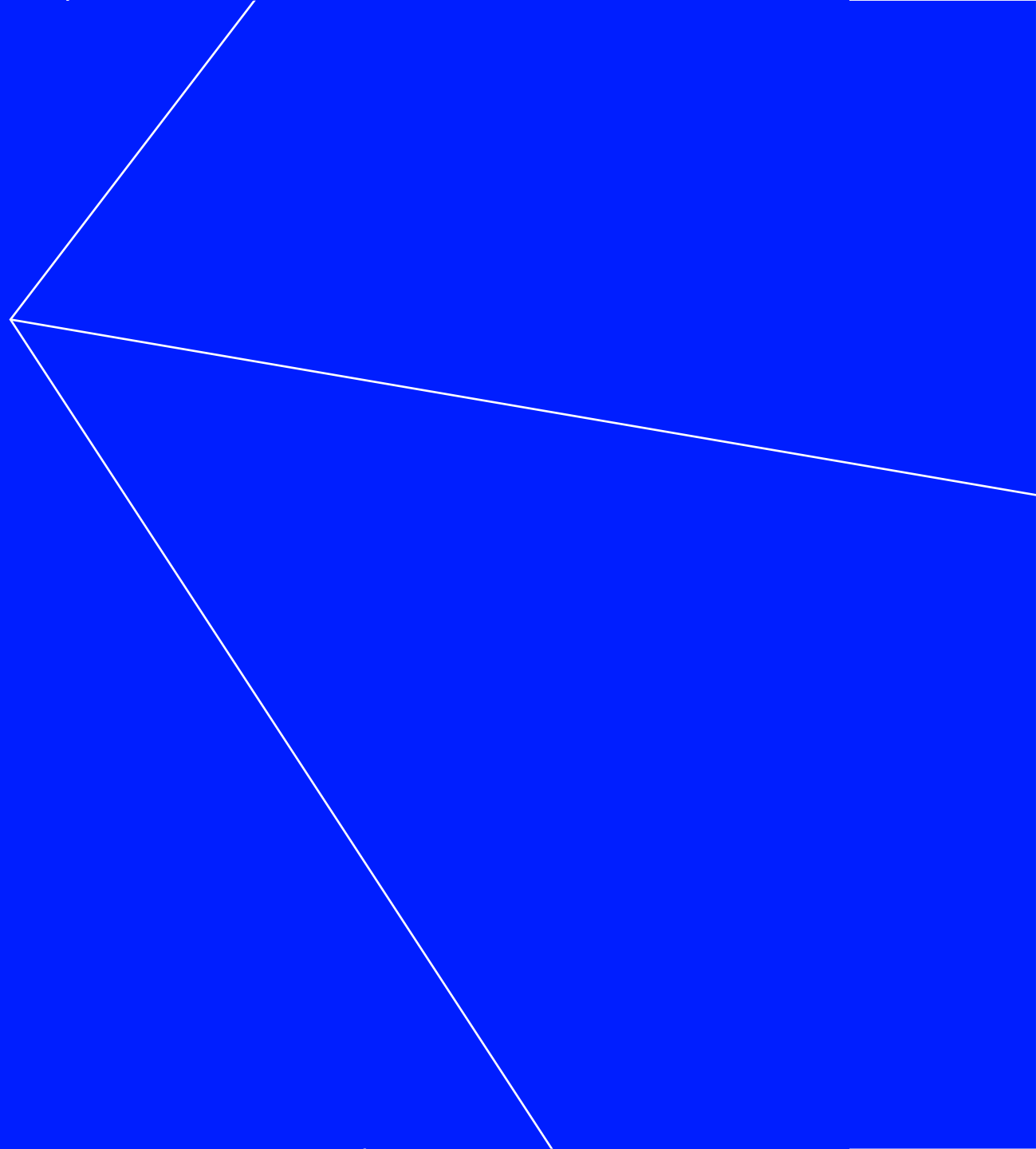
LSEG

Guidance / actionable lessons

1	Aim for non-invasive governance by design governance as a product feature, not a process
2	Shift from “human-led, tool-supported” to “agent-led, human-in-the-loop”
3	Embed controls where work actually happens
4	Use AI to enforce governance, not wait for governance to enable AI
5	Measure success by friction removed, not controls added
6	Adjust governance so its flexible and doesn't prevent innovation
7	Use what you already have – don't necessarily need a new policy Think of some examples from LSEG. Where we invested new (new head AI, responsible AI wg) vs leveraged existing (same controls, added to existing policies, elevated model risk mgmt. – pros and cons of bending... round peg square hole)
8	Importance of Effective triage – how this helps to operationalise

Thank you

LSEG



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FIRESIDE CHAT

Creating Trust in Data for the AI Era



John Bottega

President



Aga Strandkov

Head of Data Strategy



Emma York

Corporate CDO & Head of
Enterprise Information
Governance



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PANEL

Data Products: Unlocking the Gold in Enterprise Data

Moderator



Rob Wentz

Senior Advisor, Product
Management



Ben Clinch

Data, AI and Architecture
Advocate



Pablo Kotey

Head of Data
Enablement



Nikhil Rao

Senior Expert
McKinsey Digital



Tina Salvage

Data & AI Governance
Consultant



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SPOTLIGHT

The New EDM Association in Action: Delivering Real-World Impact

Moderator



Mark Sage

Executive Director
AREA – EDM Association



Sian Purver

Chief Operating Officer



Miquel Vidal Trilla

Head of Extended Reality
Solutions (XRS)



The EDM Association Community



AREA

Augmented Reality for
Enterprise Alliance



DTC

Digital Twin
Consortium



D&A

Data & Analytics

Data & Analytics

OMG

Standards
Development
Organization



Building Confidence Through Standards

Successful organizations need a **common foundation** that helps people, systems, and businesses work together effectively.

At EDM Association + Object Management Group® (OMG®), our work helps organizations **reduce complexity, build trust, and create lasting value** in an increasingly connected world.

- 35 years
- 700+ cross-industry organizations
- 30 countries

250+ shared standards:

- Model systems
- Exchange information
- Collaborate and innovate with confidence



1998: OMG recognized by **International Organization for Standardization® (ISO®)**

- Fast-Track/PAS submitter
- Enter the ISO process at an advanced stage

Many OMG specifications ratified as **ISO/IEC standards**

- **UML** as the first approved as an ISO standard in 2005

Transform Faster. Work Together Better. Grow with Confidence.

As organizations modernize and grow, they need systems, partners, and teams that can work together seamlessly – made possible through **250+ globally recognized standards**



Systems Engineering



Software & Architecture Modeling



Real-time Data Connectivity



Data Product Descriptions



Business Process Modeling

- Simplify collaboration across organizations
- Improve consistency and trust in information
- Reduce risk when adopting new technologies
- Support long-term growth and innovation

The result:

Greater confidence in business decisions and better outcomes for customers, employees, and stakeholders

Supporting Industries That Keep the World Moving

Standards that most people never see!

- **Air travel systems** use standards such as DDS® and SysML® to help keep flights safe, connected, and on schedule
- **Defense organizations** coordinate complex operations with SysML®, UML®, and DDS®
- **Space exploration and mission-control programs** rely on SysML® for mission design and DDS® for real-time data distribution
- **Financial institutions** manage global markets, transactions, data products, and process flows using standards such as BPMN™ and DPROD™
- **Automotive companies** develop the next generation of vehicles with SysML®, UML®, and real-time DDS®-based architectures
- *Plus: Healthcare, retail, telecommunications, etc...*



A Foundation for Trust

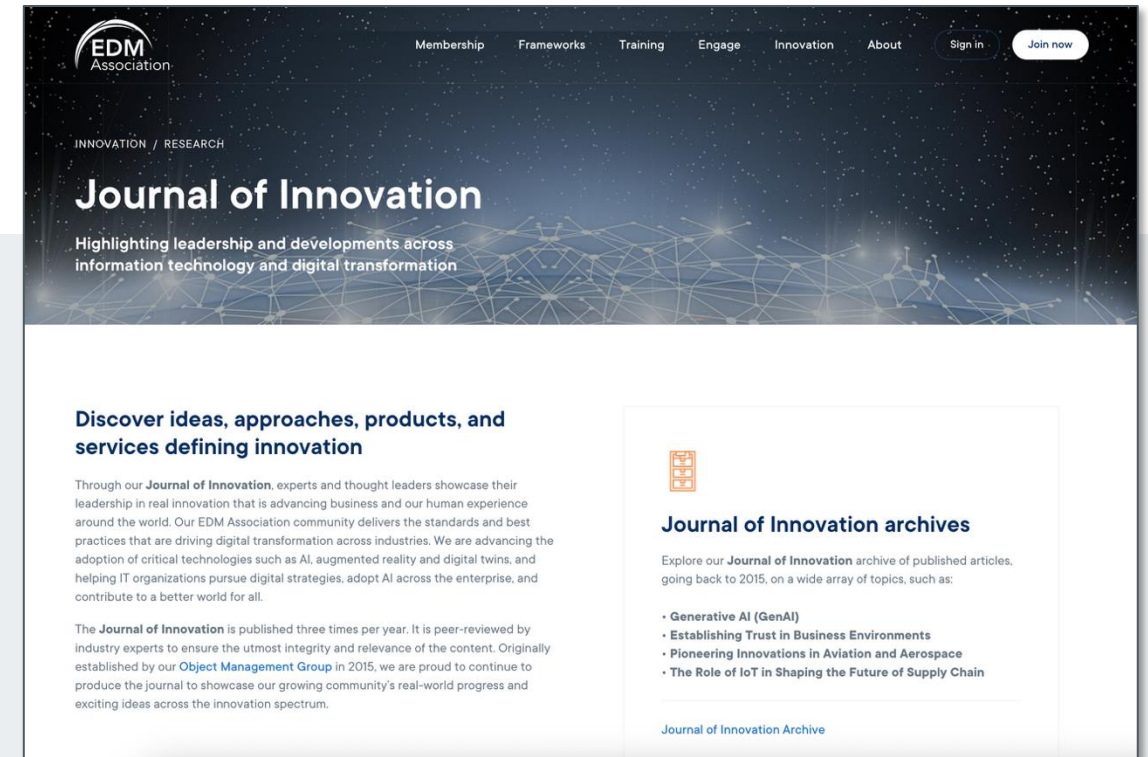
Standards are about making it easier for organizations to **work better together**.

- By creating a **common framework for collaboration**, organizations can innovate faster, reduce uncertainty, and focus on what matters most—delivering value to their customers and stakeholders.
- When organizations **can trust the information and data they share**, they can move forward with confidence.



Journal of Innovation

- Showcases critical technologies across the entire EDM community
- Continues the legacy that began in 2015 with Object Management Group
- Peer-reviewed to ensure the utmost integrity and relevance of the content
- **Upcoming 2026 Editions (closed):**
 - ***Supply Chain Reimagined — Circular, Smart, and Adaptive*** – Publishes July 28
 - ***The Role of Knowledge Graphs in the Age of AI*** – Publishes November 10



Contribute your expertise!

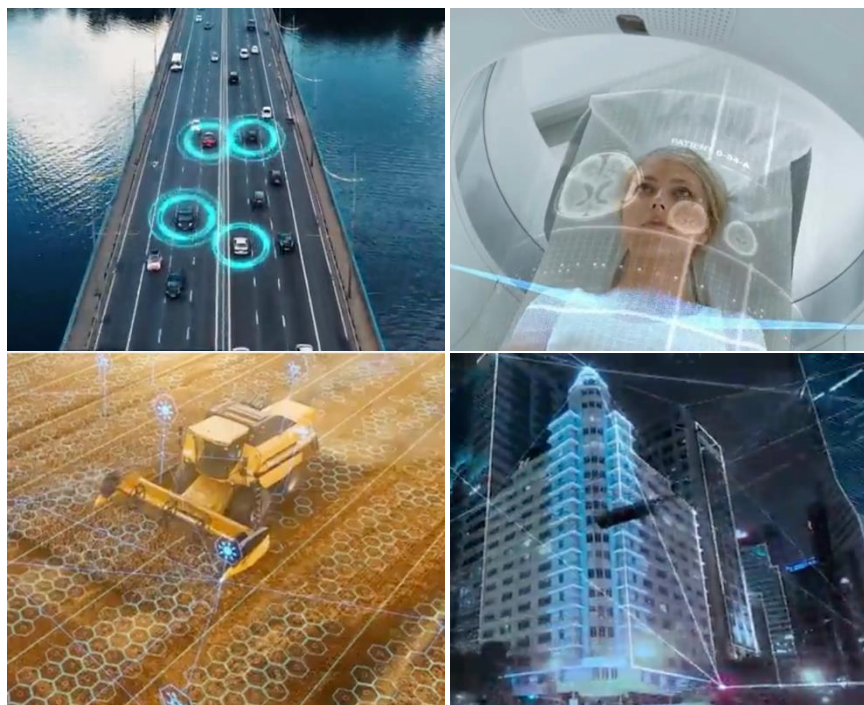
- Suggest our future issue themes for 2027
- Send email to Karen@omg.org



Digital Twins driving the world's newest ideas

Virtual representations of real-world entities and processes – synchronized at a specific frequency and fidelity

- Simulate technology scenarios
- Optimize decisions in a virtual space but with real-world data



Endless use cases:

- **Manufacturing:** plan, build and test new products
- **Construction:** make cities and buildings more healthy, efficient and sustainable
- **Transportation:** plan less congested corridors
- **Energy grids:** upgrade to more resilient, efficient and secure
- **Healthcare:** validate and deploy treatments and systems
- **Disasters:** predict and plan emergency responses
- **Agriculture & Aquaculture:** maximize yields and efficient use of land, water and fertilizer
- *...and much more across supply chains, blockchain, autonomous systems, Net Zero strategies, etc.*

Learn more in the exhibit area!
Visit www.digitaltwinconsortium.org/

The AREA is...

...the only global, membership-funded non-profit alliance dedicated to helping accelerate the adoption of Enterprise Augmented Reality (AR) by supporting the growth of a comprehensive ecosystem

What is Enterprise AR?



AR overlays digital guidance directly into a worker's field of view

Enterprise AR overlays digital data, 3D models, and interactive instructions onto real-world industrial environments — boosting workforce productivity, enabling remote collaboration, enhancing safety, and reducing human error across manufacturing, field service, and logistics.

► ENTERPRISE AR DEVICES



HMS SINGRAY G2



XREAL One Pro

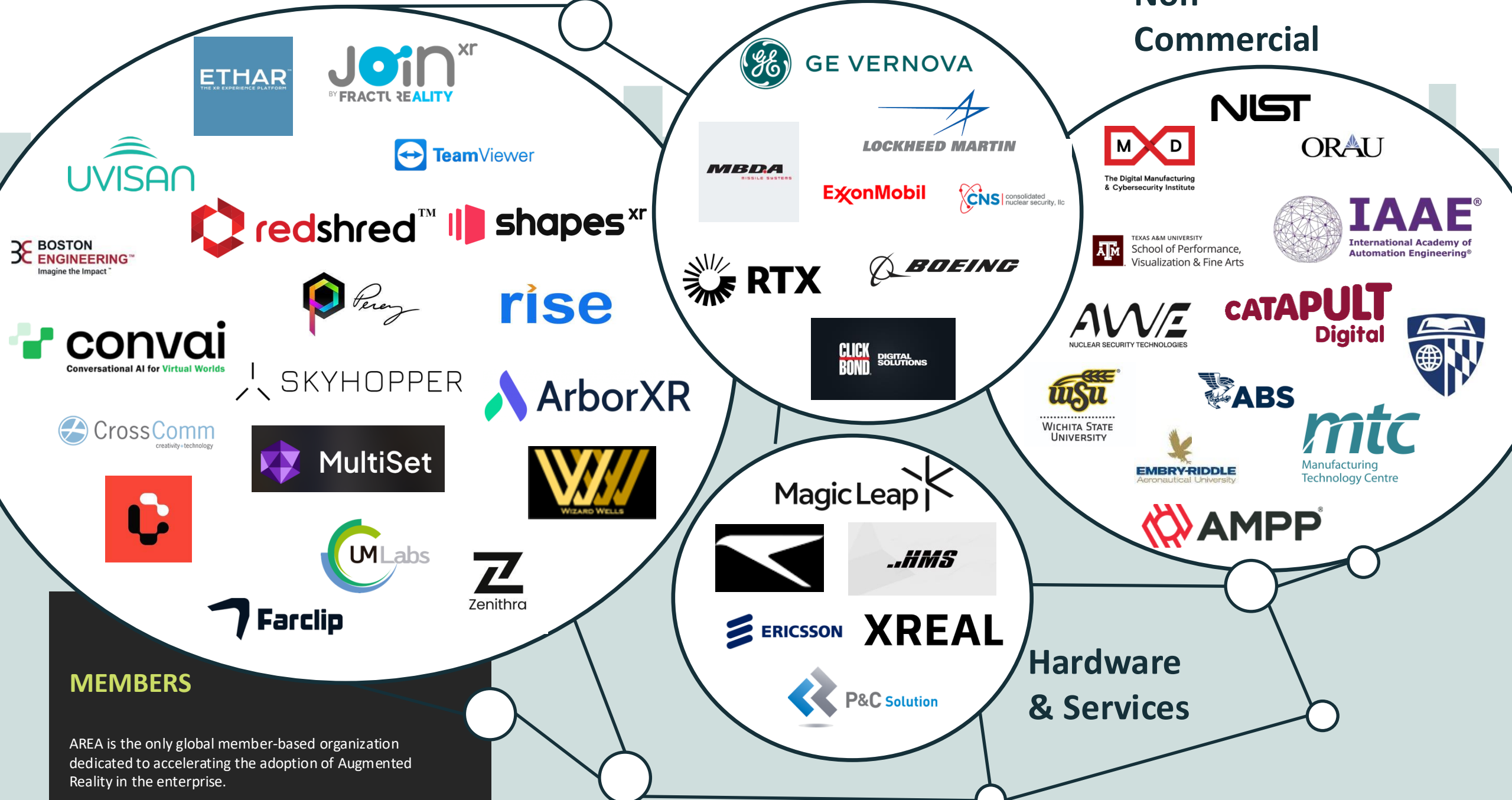


Vuzix M4000

Software & Services

Enterprise

Non-Commercial



MEMBERS

AREA is the only global member-based organization dedicated to accelerating the adoption of Augmented Reality in the enterprise.

How does the AREA support the AR Ecosystem?



Thought Leadership

The AREA creates, collects and curates neutral, up to date enterprise AR content, created by thought leaders and experts



Networking & Marketplace

The AREA facilitates an environment for the AR community to connect, sharing experiences, partnerships and insights related to AR adoption



Educate

The AREA supports programs that will close the AR skills gap by promoting continuing education and job openings

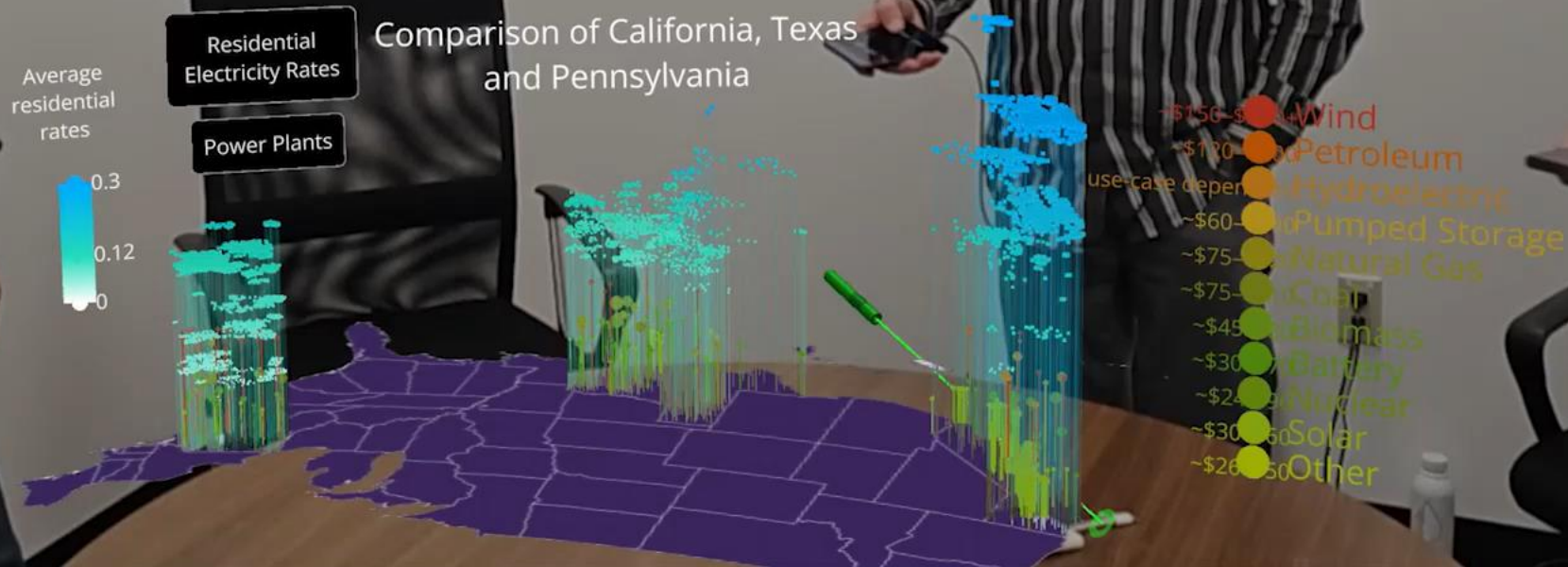


Reducing Barriers to adoption

The AREA committees focus on adoption issues including Research, Security, Requirements and Safety

AREA membership reduces the risk, cost, and uncertainty of enterprise XR adoption

Offering	Overview	Value
AREA-directed Research	Currently 15 th member driven research agenda + RFP cycle	Practical guidance, less wasted effort
AREA ROI Calculator	Online tool to estimate and communicate AR ROI for enterprise use cases	Stronger business cases, faster buy-in
AR Heuristics Tool	12 AR/MR usability heuristics + checklist for evaluation	Better UX, fewer usability pitfalls
ASON Requirements Tool	Online statement-of-needs tool to manage enterprise AR requirements	Faster scoping, better supplier alignment
Infographics (PPE , Safety , Security , Zero Trust)	Practical guidance visuals for deployment planning	Faster awareness, better risk conversations
Use Case & Case Studies Repository	Central repository of use cases and members case studies	Faster learning, better decisions
AREA Events	Two F2F per year: demos, panels, workshop, ROI master class	Rapid learning, peer insights
Webinars + Fireside Chats	Ongoing member programming	Stay current, learn from real deployments
AREA Innovation Impact Framework (<i>in development</i>)	Human factors framework from idea to impact	Higher adoption, fewer failed rollouts
AREA Scaling Toolkit (<i>in development</i>)	Integrated toolkit to move from pilot to scale (readiness, playbook, stakeholder + scaling ROI)	Faster scale-up, reduced “pilot purgatory” risk
Enterprise-Ready Device Requirements (<i>in development</i>)	Member-defined enterprise-ready standard for AndroidXR + OEMs	Lower device risk, better IT + ops fit
AR Measurement Package (Data Model + AI) (<i>in development</i>)	Standard work execution data model plus reusable dataset specs (content quality + performance)	Comparable metrics, auditability, continuous improvement



Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



Start	Topic	Speakers
13.00	Welcome Address – Gold In, Gold Out: Trusted Data and Optimised AI for a Brilliant Future	John Bottega – President, EDM Association
13.10	UBS Keynote – From Data to Dollars: Why AI Is Forcing Banks to Treat Data Like Capital	James Dallas – Head of Investment Bank Change, UBS
13.20	Data Asset Foundations: Mining Business Value Through Trusted Data	Aga Strandkov – Head of Data Strategy, Digital Isle of Man Lyle Wraxall – Chief Executive, Digital Isle of Man
13.35	Mining the Gold: Trusted Data and Trusted AI	Sanja Hukovic – Group Director, Head of Model and AI Risk Mgmt., LSEG Emma York – Corporate CDO & Head of Enterprise Info. Governance, LSEG
13.50	Fireside Chat: Creating Trust in Data for the AI Era	<u>Moderator:</u> John Bottega – President, EDMA Aga Strandkov – Head of Data Strategy, Digital Isle of Man Emma York – Corporate CDO & Head of Enterprise Info. Governance, LSEG
14.00	Panel – Data Products: Unlocking the Gold in Enterprise Data	<u>Moderator:</u> Rob Wentz – Senior Advisor, Product Mgmt., EDM Association Ben Clinch – Data, AI and Architecture Advocate Pablo Kotey – Head of Data Enablement, Schroders Nikhil Rao – Senior Expert, McKinsey Digital Tina Salvage – Data & AI Governance Consultant, OMNIADIGITAL
14.40	Spotlight – The New EDM Association in Action: Delivering Real-World Impact	Mark Sage – Executive Director, AREA - EDM Association Sian Purver – Chief Operating Officer, Crysp Miquel Vidal Trilla – Head of Extended Reality Solutions (XRS), CBRE
15.05	Break	



Hosted by:
UBS

The DataVision logo, featuring a stylized white arc above the text "DataVision" in white.

DataVision

Let's take a break!
Be back at 3:30pm!

Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



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15.35	Panel – Shine Brightly with DCAM, Benchmarking and the Data Excellence Program	<u>Moderator:</u> Chiara Brown – Regional Advocate, EMEA, EDM Association Sian McHenry – Group Data Governance Dir., Nationwide Building Society Scott Beange – Head of Data Mgmt. & Cyber Strategy, Projective Group
15.55	Scaling Data Management Success: DCAM Benchmarking and Partner-Led AI Innovation	Rob Wentz – Senior Advisor, Product Mgmt. - Frameworks, EDM Association Predrag Dizdarevic – Partner, Element 22 Tom Truman – Vice President, Solidatus
16.15	Spotlight – CDMC+AI: Key Controls for an AI World	Oli Bage – Head of Research and Trading Platform Architecture, G-Research
16.30	Reigniting BCBS 239 in the Age of AI: Why Risk Data Matters More	<u>Moderator:</u> Stella Cabrera – Sr. Advisor, Authorized Partner Program, EDMA Scott Beange – Head of Data Mgmt. & Cyber Strategy, Projective Group Dominic Sanchez – Global Data Programs Delivery Director, SMBC Group
16.45	Panel Session – The Data Excellence Gym: Coaching Your Business to AI Fitness	<u>Moderator:</u> Roberto Maranca – Energy Mgmt. Data Officer, Schneider Elec. Paulomi Shah – Head of Cross Domain Services, Data Glossary and Taxonomy Standards, UBS Sholthana Begum – Senior Dir., Tech & Digital, Competition & Markets Auth. Kyle Morton – Chief Operating Officer
17.20	Closing Remarks: Gold In, Gold Out	John Bottega & Kyle Morton – EDM Association
17.25	Networking Drinks Reception	

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Building Trusted Data to Optimize AI



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PANEL

Shine Brightly with DCAM, Benchmarking and the Data Excellence Program

Moderator



Chiara Brown

Regional Advocate, EMEA



Sian McHenry

Group Data Governance Director



Scott Beange

Head of Data Management &
Cyber Strategy



Data Excellence Program

Problem

Lack of Standards-Based Recognition
for Data Management Excellence at the
Organizational Level



Solution: EDM Association Data Excellence Program

Project vs. Program –
Manage data as an
ongoing *program*

**Measure Data Management
Capability** at the organizational
level based on DCAM

Earn Recognition – for
your organization's data
management excellence



Data Excellence Program



Data Excellence Program – Participants

Founding Participants



Participants



Data Excellence Program – Certified Partners

Founding Partners



Partners



Nationwide – Data Excellence Journey





Case Study
Nationwide Building Society accelerates its Data Governance Maturity journey with achievements in DCAM™ and the Data Excellence Program

Summary

Since 2023, Nationwide has made measurable strides in strengthening data as a critical business asset, achieving a DCAM™ score in-line with the UK Financial Services average in 2025. Participation in the Data Excellence Program has ensured Nationwide data is not only fit-for-purpose but is a strategic asset in supporting customer needs.



DCAM - The Data Management Capability Assessment Model



Business Challenge

As Nationwide began its DCAM journey, it recognised the need to take a more deliberate, enterprise-wide approach to data management. Initial assessments identified opportunities to strengthen data management capabilities across critical domains, including clearer ownership of key data roles and stronger capabilities in metadata, lineage and data quality. For an organisation of Nationwide's scale and ambition, strengthening data management was essential—not only to meet regulatory obligations, but to unlock greater business value and enable future innovation. High quality, available and reusable data remains a core enabler of our business strategy.

Results

- **Meaningful maturity gains delivered** across key business domains, embedding consistent data management practices and providing clearer visibility of strengths, gaps and priority improvement areas strongly linked to business value.
- **Organisational capability embedded** through data literacy training and structured DCAM education for key data role holders, strengthening shared understanding, accountability and confidence in data assets.
- **Industry recognition achieved** as Nationwide became the *first UK Financial Services company* to earn the EDM Association's Data Excellence Program Gold badge, evidencing sustained progress and an enduring commitment to treating data as a core strategic asset.



For more information about this case study, DCAM™ or the Data Excellence Program, please contact us at info@edmcouncil.org or edma.org

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Read the Case Study:



What differentiates organisations?

1

Diagnostic, not certification — use DCAM component-level detail to find the *why* behind the score, the risk of any capability gaps and benefits of closing those gaps.

2

Benchmark with scrutiny — compare your DCAM scores against your peers and dig into *what* leading firms do differently, rather than just noting the percentile gap

3

Senior sponsorship — results need to land at the exec level with real funding and mandate, not just live in the data office

4

Value-led focus — prioritise the capability gaps with the biggest downstream business impact rather than working through the framework in order. Utilise the EDMA Data ROI framework.

5

Repeat cadence — reassess every 12-18 months so the assessment is not a single snapshot, but becomes a real demonstration of progress



To learn more:



scottbeange@projectivegroup.com

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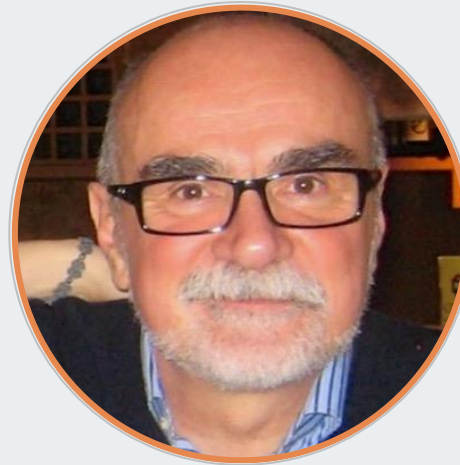


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Scaling Data Management Success: DCAM Benchmarking and Partner-Led AI Innovation



Rob Wentz
Senior Advisor, Product
Management - Frameworks



Predrag Dizdarevic
Partner



Tom Truman
Vice President





Benchmark Viewer

Video

element₂₂



Pellustro



— • MEMBER —

Using EDM Association's Data Management *Benchmark* Viewer.

POWERED BY | Pellustro

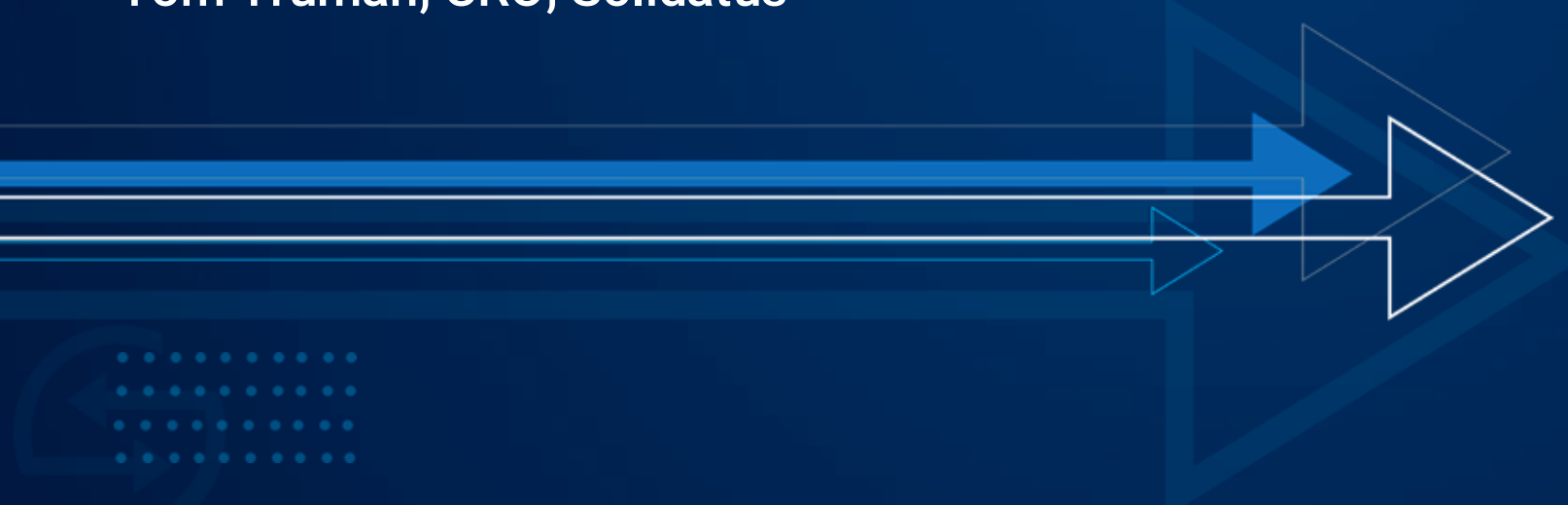
PELLUSTRO

MEMBER WORKFLOW

Trust your data? Prove it.

Prove what happened. Predict what's next. Protect what matters.

Tom Truman, CRO, Solidatus



Data teams face a perfect storm of competing demands

Four Critical Forces Reshaping Data Strategy



Regulatory Scrutiny

External regulators are intensifying oversight with stringent mandates like BCBS 239 and DORA creating new compliance imperatives



The Rush to AI

The race to adopt AI and GenAI demands a foundation of trustworthy, traceable data that most organizations simply don't have in place.



Cost Optimization

Intense market pressure to reduce operational costs requires greater data efficiency and strategic consolidation across platforms.



Infrastructure Chaos

Growing complexity across hybrid and multi-cloud estates creates critical blind spots and exponentially increases operational risk.

The Business Reality

- Reactive, manual audit prep creates unacceptable compliance risk
- Data silos break context and block transformation
- Disconnected tools provide a partial, untrustworthy picture of your data
- Technical-only views mean critical business context is lost
- Lack of a shared, trusted view erodes executive confidence

The Data Lineage Mission

Create a shared, always-on view of how data flows - so teams can move faster, stay compliant, and reduce risk.

Solidatus – who we are

The Data Lineage Company

Where global banks, regulators, and insurers go to see the truth.

With Solidatus, data leaders prove compliance, predict downstream impact, and protect data use at scale – enabling confident decisions, faster change, and safer AI.

Solidatus Use Cases

Regulatory compliance, including BCBS 239, DORA, EU AI Act
Trusted Data Products

AI Governance

Enterprise Ontology in the world of finance – FIBO

Solidatus Partners

accenture

KPMG

Microsoft

aws

EY

pwc

quantexa

Google

experian

zenity

ABN·AMRO BARCLAYS BNY

British Business Bank

CONNOR, CLARK & LUNN
FINANCIAL GROUP



Deutsche Bank

FCA FINANCIAL CONDUCT AUTHORITY

HSBC

Investec

Legal & General

Luminor



LSEG

Maybank

M&T Bank

NOW:
Pensions

Paysafe

PIC

ROYAL LONDON
ASSET MANAGEMENT

SPUERKEESS

Endorsed by data leaders at the world's leading financial institutions

Your peers, facing the exact same challenges, have chosen and succeeded with Solidatus



“Data is key to everything we do at BNY. Ensuring we have proper data governance is essential to how we operate. Solidatus is helping us extend and integrate the metadata repositories we use to maintain our market leading data complex. Solidatus is helping BNY Mellon drive better data outcomes.”

Eric Hirschhorn, Chief Data Officer
Bank of New York



“Our cross-border data sharing approval process was impeding change through a heavily manual and slow procedure. Solidatus' transformative technology powered our solution, digitizing data sharing approval requests and delivering an automated response based on a set of predefined parameters. What was taking months is now taking minutes!”

Matthew Widick, Group Head of Data Management
HSBC



“Lineage is the Holy Grail for financial services. We haven't had anything like what we have now, which is visualizing and bringing this to the fore. Tools is one thing, but that's not enough. You need experts in lineage too, to support defining the framework and how it will look. Ensuring we understand the data going in and the quality going out means we are ready and AI-enabled.”

Chris Skinner, Data Governance Director
LSEG

New Benefit for EDMA Members



- From read-only access to **full author-level access** to Solidatus for testing purposes (*Exclusive Access for EDMA Members*)
- Sandbox environment
- Ability to upload synthetic data to test data lineage and metadata modelling requirements
- Ability to create complex metadata models
- Access to a Community of Practice for Metadata Modeling for collaboration between members and access to Solidatus technical experts
- Access to Solidatus eLearning

AI Lineage Assistant

The AI Lineage Assistant executes complex agentic workflows—stitching lineage, mapping business terms, enriching metadata—and stages all changes in a safety sandbox for your validation.

You maintain complete control. The AI does the heavy lifting; you provide the expertise and final approval.

Next steps

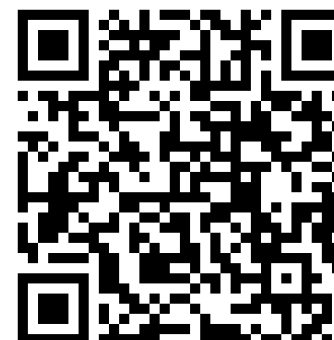


- Access is available today - July 7th
- For EDM Association members – access will be turned on automatically.
https://edmcportal.org/portal-tutorial/using-a-best-practice-knowledge-model/*
- For non-EDM Association members – register on EDMConnect first:
<https://edmconnect.edmcouncil.org/>
- For more information about Solidatus – www.solidatus.com
- Any questions, reach out to us at hello@solidatus.com

Knowledge Portal



EDMConnect



Solidatus



*Please ensure you are signed up with a business email address



Solidatus AI Lineage Assistant demo

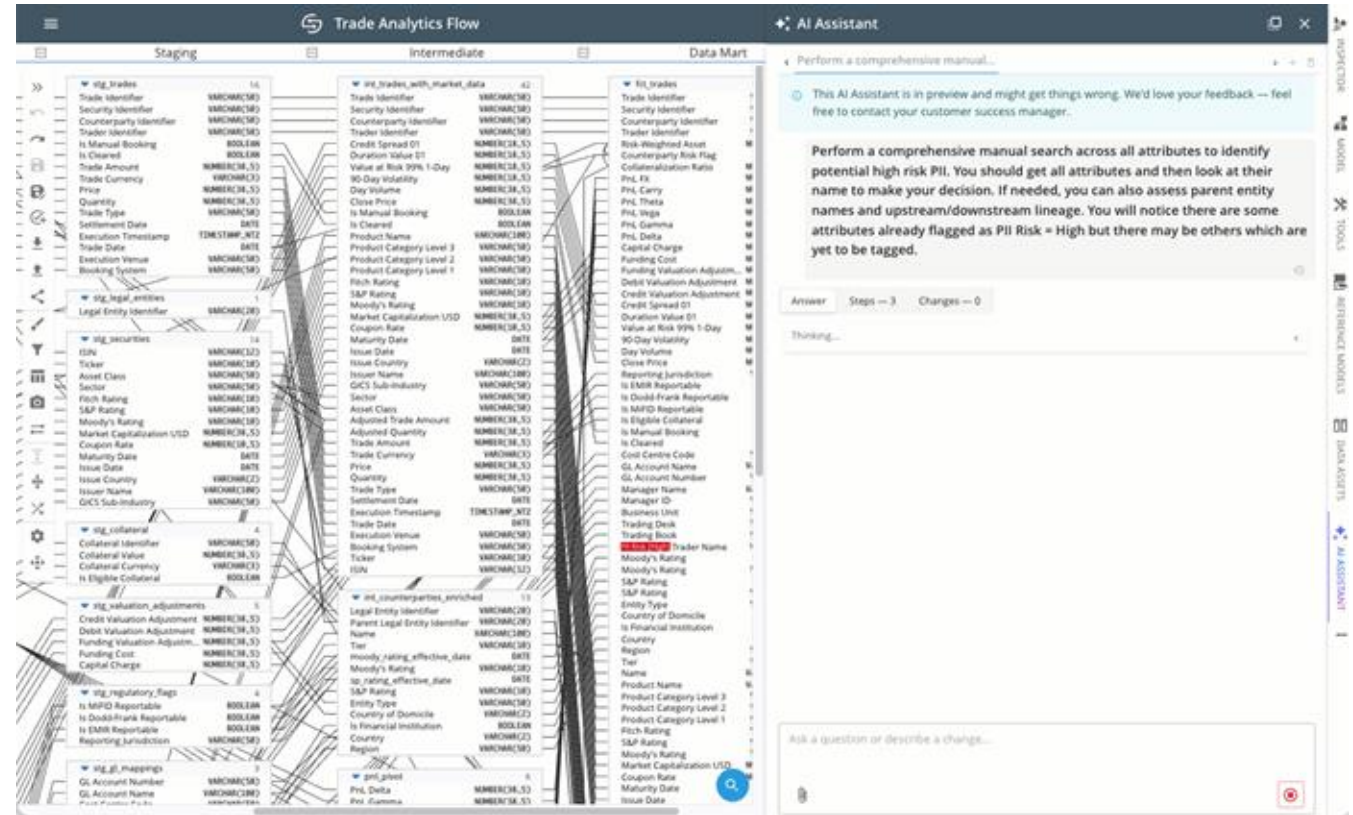


Active Model Editing with Deep Context Awareness

More than Q&A, AI That Builds Lineage

10X-100X acceleration of complex modeling tasks

- **Rapid complex analysis:** BCBS 239 analysis on hundreds of thousands of entities in minutes instead of months
- **Natural language prompts:** Execute complex workflows like "Map these columns to the Business Glossary"
- **Confidence-scored suggestions:** See why the AI made each recommendation with evidence
- **Staged for validation:** Review, refine, or reject proposals with visual diffs before production

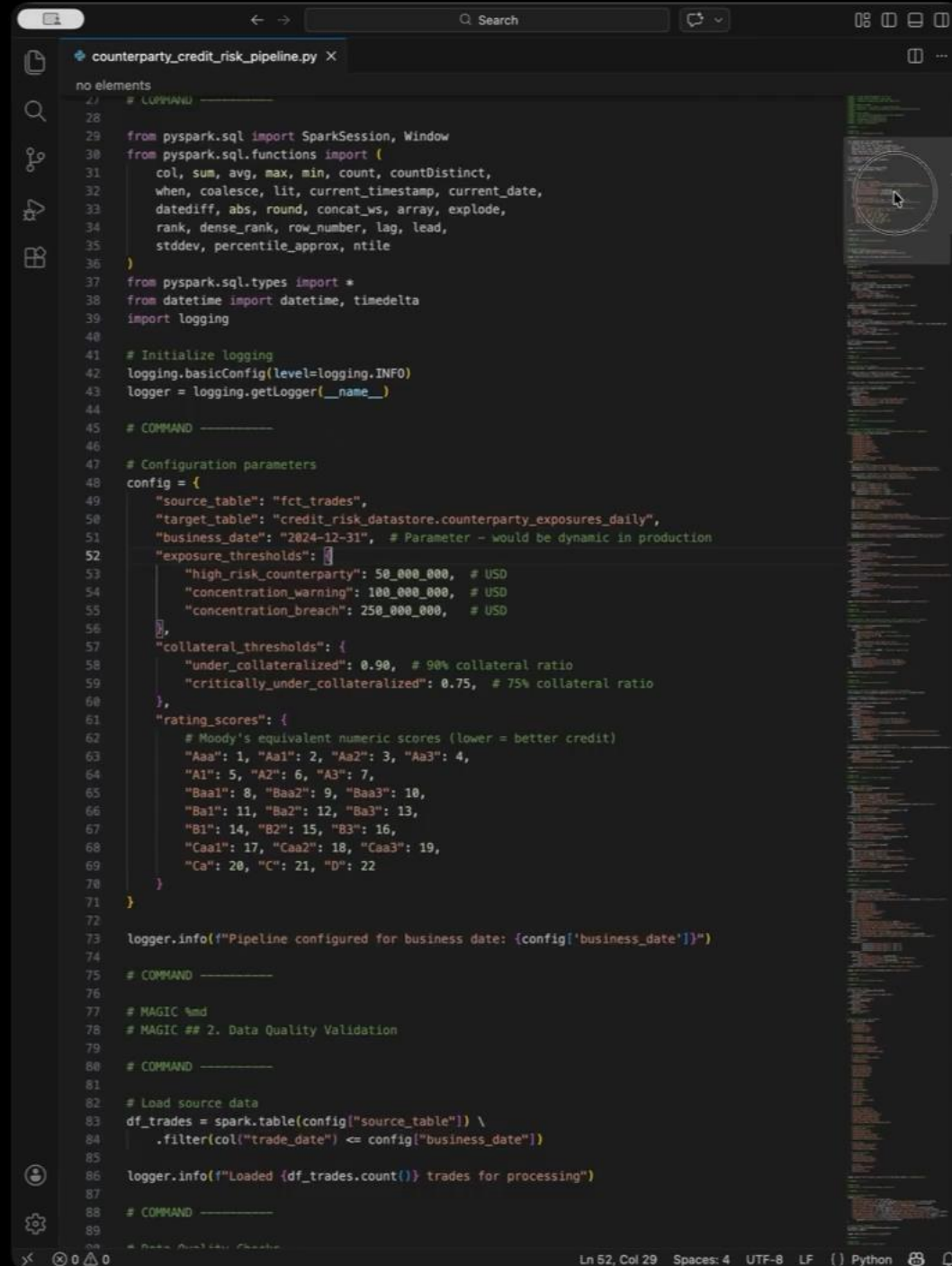


Use natural language prompts to build lineage on hundreds of thousands of entities

AI-POWERED LINEAGE HUMAN GOVERNED RESULTS

Import → Enrich → Govern → Comply

Video demo – please watch
the DataVision recording to
see the demo



```
counterparty_credit_risk_pipeline.py X
no elements
28
29 from pyspark.sql import SparkSession, Window
30 from pyspark.sql.functions import (
31     col, sum, avg, max, min, count, countDistinct,
32     when, coalesce, lit, current_timestamp, current_date,
33     datediff, abs, round, concat_ws, array, explode,
34     rank, dense_rank, row_number, lag, lead,
35     stddev, percentile_approx, ntile
36 )
37 from pyspark.sql.types import *
38 from datetime import datetime, timedelta
39 import logging
40
41 # Initialize logging
42 logging.basicConfig(level=logging.INFO)
43 logger = logging.getLogger(__name__)
44
45 # COMMAND -----
46
47 # Configuration parameters
48 config = {
49     "source_table": "fct_trades",
50     "target_table": "credit_risk_datastore.counterparty_exposures_daily",
51     "business_date": "2024-12-31", # Parameter - would be dynamic in production
52     "exposure_thresholds": {
53         "high_risk_counterparty": 50_000_000, # USD
54         "concentration_warning": 100_000_000, # USD
55         "concentration_breach": 250_000_000, # USD
56     },
57     "collateral_thresholds": {
58         "under_collateralized": 0.90, # 90% collateral ratio
59         "critically_under_collateralized": 0.75, # 75% collateral ratio
60     },
61     "rating_scores": {
62         # Moody's equivalent numeric scores (lower = better credit)
63         "Aaa": 1, "Aa1": 2, "Aa2": 3, "Aa3": 4,
64         "A1": 5, "A2": 6, "A3": 7,
65         "Baa1": 8, "Baa2": 9, "Baa3": 10,
66         "Ba1": 11, "Ba2": 12, "Ba3": 13,
67         "B1": 14, "B2": 15, "B3": 16,
68         "Caa1": 17, "Caa2": 18, "Caa3": 19,
69         "Ca": 20, "C": 21, "D": 22
70     }
71 }
72
73 logger.info(f"Pipeline configured for business date: {config['business_date']}")
74
75 # COMMAND -----
76
77 # MAGIC %md
78 # MAGIC ## 2. Data Quality Validation
79
80 # COMMAND -----
81
82 # Load source data
83 df_trades = spark.table(config["source_table"]) \
84     .filter(col("trade_date") <= config["business_date"])
85
86 logger.info(f"Loaded {df_trades.count()} trades for processing")
87
88 # COMMAND -----
89
90 # Break Point: Check
```

Trade Analytics Flow - Solidatus

Video demo – please watch the DataVision recording to see the demo

preview.solidatus.com/viewer/69451d6d315f538168260ea5

Solidatus Trade Analytics Flow

Saved as draftShow Business Names

HOMEGRAPHADMINAI Assistant

StagingProductionIntermediateProductionData MartProductionCredit Risk Datastore

UndoRedoSaveSave asCreate taskImportExportShareRulesFiltersReportsViewsAuto mapExpandCollapseShow traceOptionsRecenter

100%

dbt + Snowflake5

dbt + Snowflake1

dbt + Snowflake1

dbt + Snowflake4

dbt + Snowflake9

dbt + Snowflake9

dbt + Snowflake28

dbt + Snowflake51

dbt + Snowflake10

int_trades_with_m...

int_counterparties...

Trade Identifier

Security Identifier

Counterparty Identifier

Credit Spread 01

Duration Value 01

Value at Risk 99% 1-Day

Is Cleared

Product Category Level 1

Trade Type

Legal Entity Identifier

Name

Tier

Moody's Rating

Entity Type

Country of Domicile

Is Financial Institution

Country

Region

fct_trades

counterparty_e...

breach_alerts

Trade Identifier

Security Identifier

Counterparty Identifier

Risk-Weighted Asset

Counterparty Risk Flag

Collateralization Ratio

Capital Charge

Funding Valuation Adjustment

Debit Valuation Adjustment

Credit Valuation Adjustment

Credit Spread 01

Duration Value 01

Value at Risk 99% 1-Day

Is Eligible Collateral

Is Cleared

Moody's Rating

Entity Type

Country of Domicile

Is Financial Institution

Country

Region

Tier

Name

Product Category Level 1

Collateral Value USD

National USD

Trade Type

Legal Entity Identifier

business_date

counterparty_id

counterparty_name

counterparty_lei

counterparty_country

counterparty_region

counterparty_domicile

counterparty_entity_type

counterparty_risk_tier

is_financial_institution_flag

counterparty_moody_rating

rating_score

rating_category

gross_notional_usd

long_notional_usd

short_notional_usd

net_exposure_usd

exposure_abs_usd

total_cva

total_dva

total_fva

total_xva

net_xva_impact

total_var_99_1d

total_rwa

total_capital_charge

avg_cs01

avg_dv01

total_collateral_usd

eligible_collateral_usd

avg_collateralization_ratio

collateral_coverage_ratio

eligible_collateral_ratio

under_collateralized_flag

critically_under_collateralized_flag

exposure_rank

concentration_pct

concentration_tier

concentration_risk_level

cumulative_exposure_usd

cumulative_concentration_pct

counterparty_risk_flag

wrong_way_risk_score

wrong_way_risk_category

trade_count

distinct_securities

distinct_asset_classes

uncleared_trade_count

processing_timestamp

data_source

pipeline_version

counterparty_id

counterparty_name

exposure_abs_usd

concentration_pct

collateral_coverage_ratio

wrong_way_risk_category

rating_category

counterparty_risk_tier

breach_reasons

Give me a concise description ...

rating_risk_summary: This object summarizes credit risk exposures by credit rating category.

Each of these new objects has been tagged with a Technology: Databricks + PySpark property and a Description property detailing its purpose.

Column-Level Lineage and Properties

Detailed column-level lineage has been established:

From fct_trades to counterparty_exposures_daily: All relevant attributes from the source fct_trades table have been mapped to their corresponding attributes in counterparty_exposures_daily. This includes direct mappings and transformations such as aggregations, scoring, and derived metrics.

From counterparty_exposures_daily to other output tables: Lineage has also been created from counterparty_exposures_daily to breach_alerts, regional_risk_summary, and rating_risk_summary, reflecting their derivation from the main exposure dataset.

For all newly created attributes, a DataType property has been assigned based on inferred data types from the PySpark operations, and a Transformation Logic property has been added to describe how each field is derived, especially for complex transformations.

This comprehensive modeling provides a clear and traceable view of the data flow and transformations within the Counterparty Credit Risk & CVA Aggregation Pipeline.

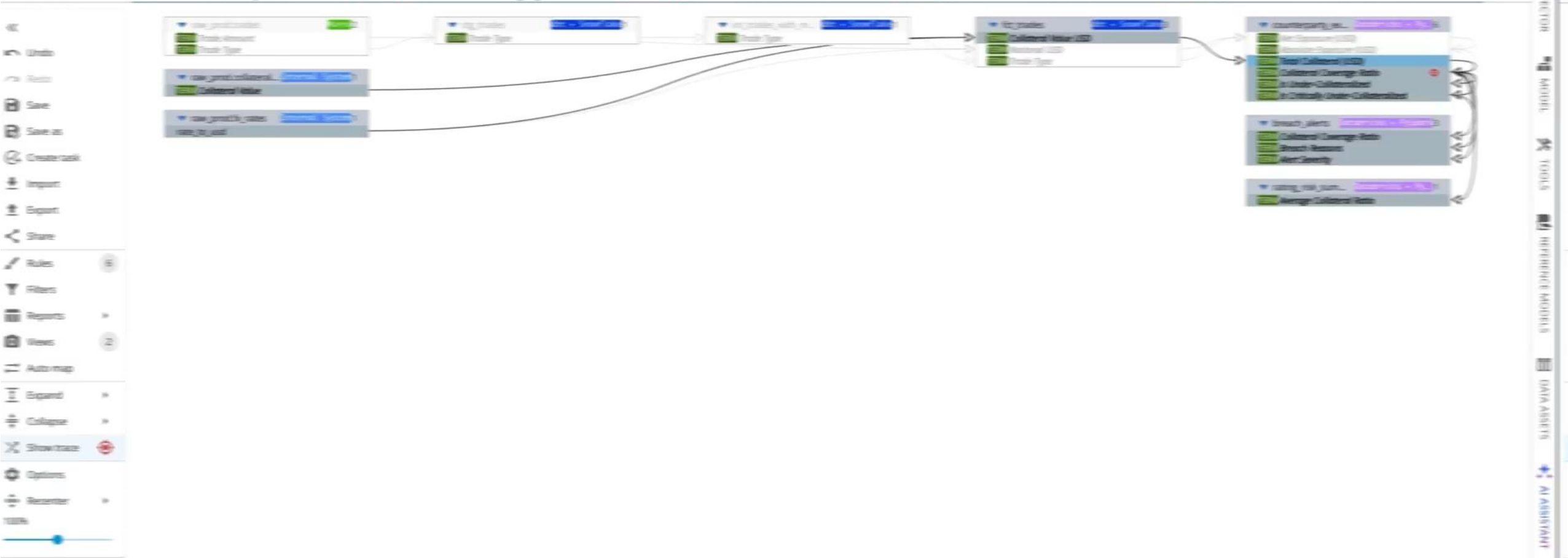
Next Steps

Show me the full lineage of the 'net_exposure_usd' attribute in 'counterparty_exposures_daily'.

List all attributes in the 'credit_risk_datastore.breach_alerts' object.

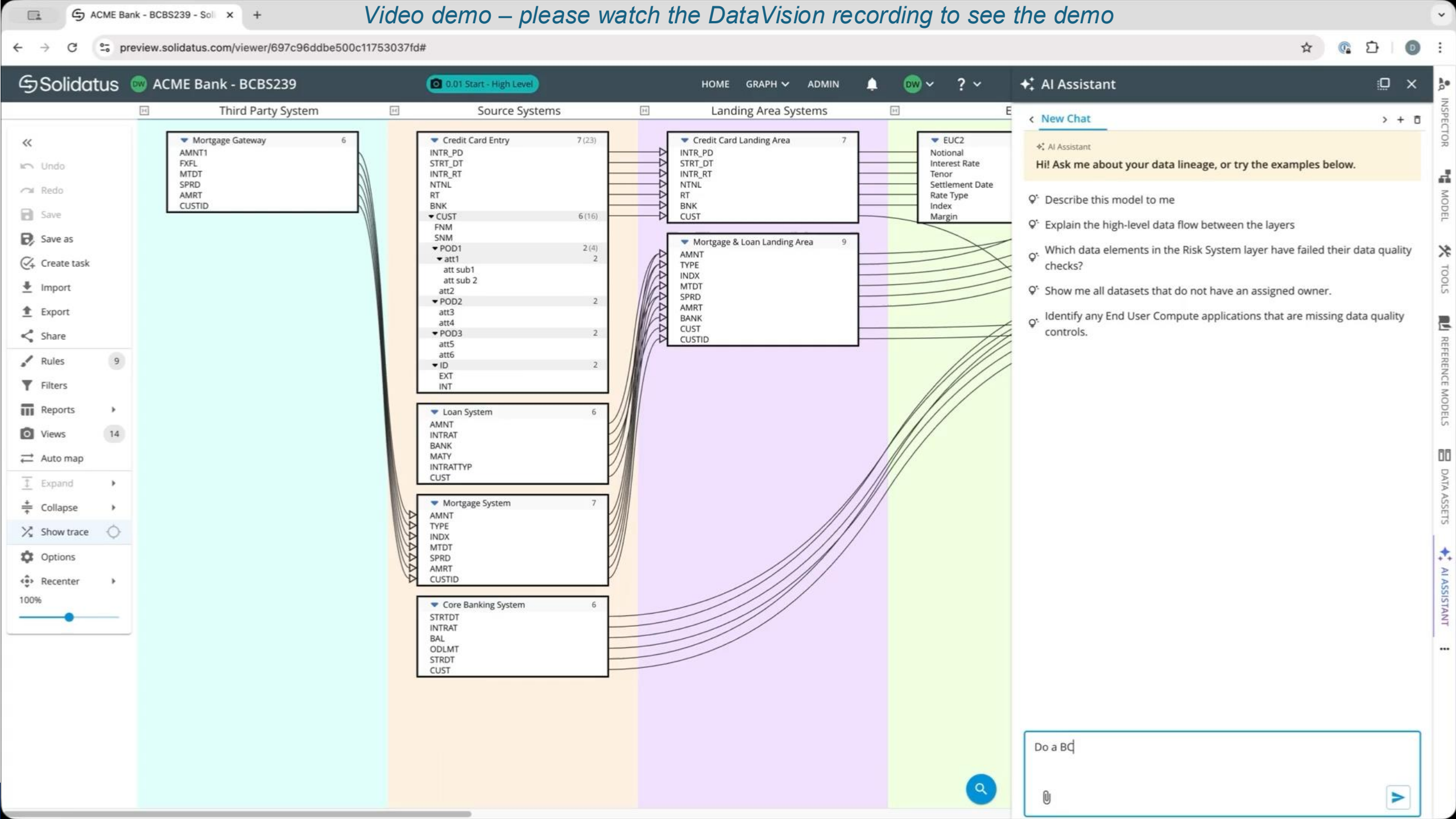
Can you show me all the transformations applied in the 'Credit Risk Datastore' layer?

Ask a question or describe a change...



- Undo
- Redo
- Save
- Save as
- Crashback
- Import
- Export
- Share
- Rules (6)
- Filters
- Reports
- Views (2)
- Automap
- Expand
- Collapse
- Show/Hide
- Options
- Resetter
- 100%

- INSPECTOR
- MODEL
- TOOLS
- REFERENCE MODELS
- DATA ASSETS
- AI ASSISTANT



*Video demo – please watch
the DataVision recording to
see the demo*

Solidatus

AI LINEAGE ASSISTANT





Thank You



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Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



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Oli Bage

Head of Research &
Trading Architecture

 RESEARCH



CDMC + AI: The Framework of Controls for AI, Data & Analytics

Oli Bage
DataVision EMEA
July 7th 2026

Revisiting the formation of CDMC to add AI & Analytics

2020-2021: CDMC Working Group and Certification



CDMC v1 Published 2021

AWS, Azure, GCP, Snowflake Certified 2021-2023

2022-2023: Analytics Working Group

Extend CDMC for
AI, Data & Analytics

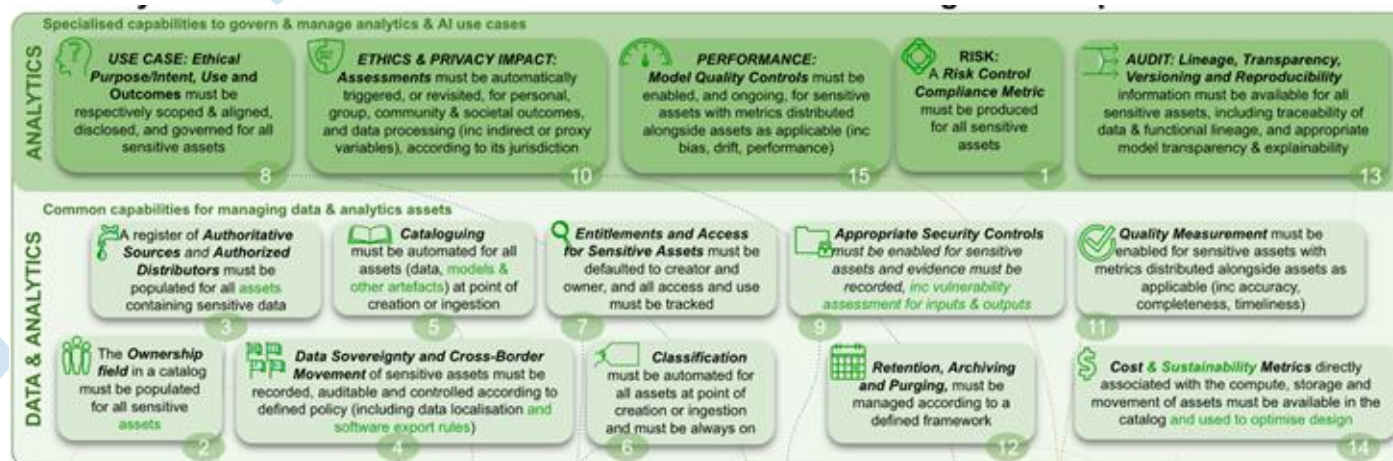


Members included:

LSEG, Databricks, Standard Chartered, JPMorgan, Standard Bank, Informatica, TNE.ai

2024-2025: ADAC is drafted & released

- ✓ ADAC framework - broad SME review
- ✓ ADAC Information Model & metadata
- ✓ ADAC Data Product extensions
- ✓ ADAC Regulatory mapping additions
- ✓ Reference Architecture
- ✓ Use Cases for AI & Data Governance
- ✓ Live use in multiple organisations



ADAC: AI, Data & Analytics Capabilities

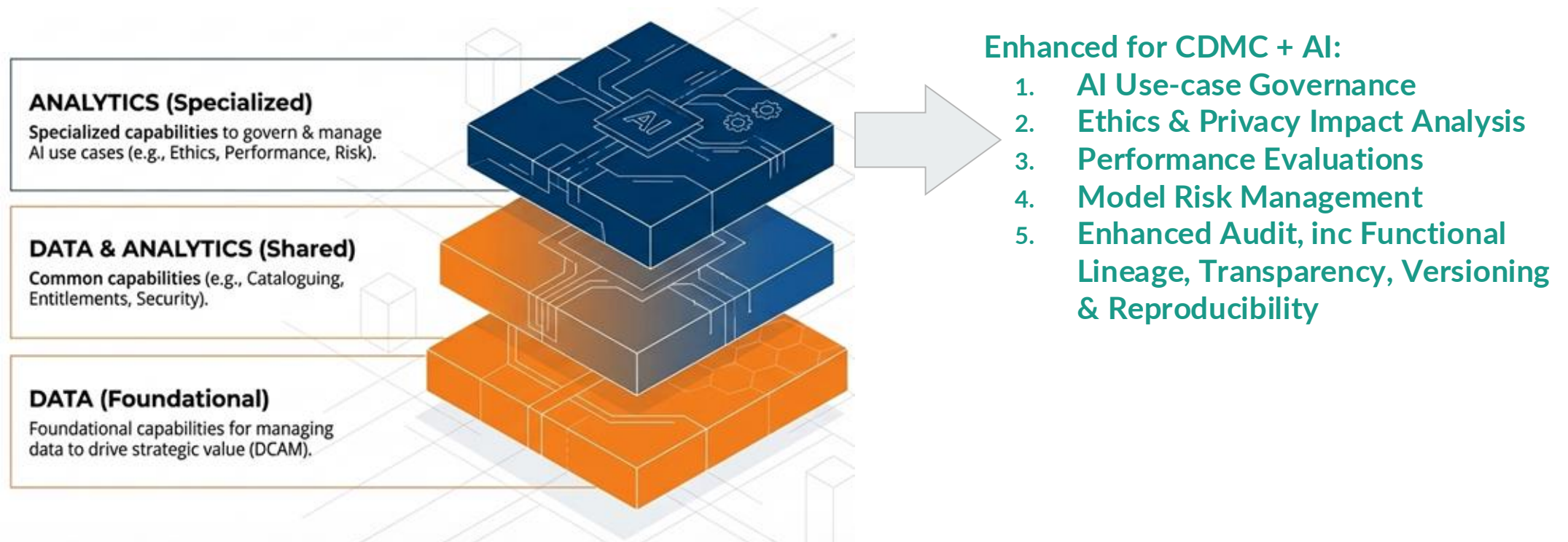
Strategic Value of Adoption

Standard to harness opportunities responsibly, avoid challenges of home-grown controls



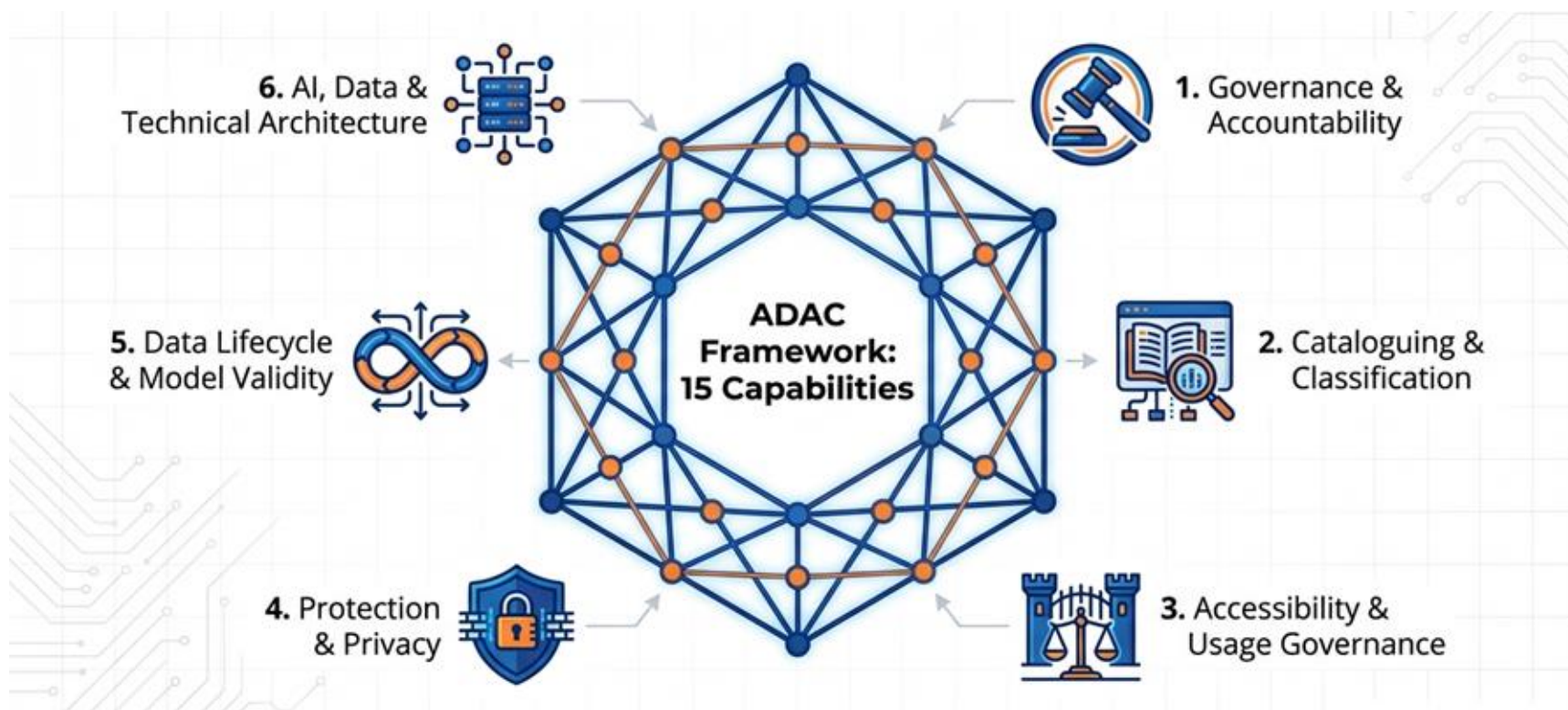
The Control Layers: Data, Analytics & the Intersection

CDMC + AI integrates AI controls (top) with shared capabilities (middle) and foundational data management (bottom)



Six Components of the CDMC + AI Framework

A set of components across 6 key areas to provide a structured approach:



1. Governance & Accountability

Establishing clear lines of ownership for AI assets.



1.1 Business Case

Defined, measurable, and governed value realization frameworks for AI and Data



1.2 Ownership

Data and AI & Analytics owners with defined responsibilities



1.3 Sourcing & Consumption

Governed sourcing and consumption,, supported by automation



1.4 Sovereignty & Cross-Border

Meeting data localization and cross-border regulations, managing software export risks

2. Cataloguing & Classification

You cannot govern what you cannot see.



2.1 Catalogues & Model Inventories



Must encompass defining characteristics of data, models, reports and transformations

Metadata must be discoverable and interoperable

Model inventories for transparency and traceability



2.2 Classifications



Defined and approved classifications

Applied to assets at the point of ingestion or creation

Essential for automating other controls

3. Accessibility & Usage Governance

Managing entitlements and establishing ethical oversight of use cases.



3.1 Entitlements

Rights and obligations captured as metadata

Enforced, with automated tracking of access and usage



3.2 Ethical Access, Use & Impact

Ethical Intent

Formal structures for ethical oversight of AI, data & analytics use cases

Disclosure of Usage

Ethical Impact Assessments with defined outcome tolerance levels

4. Protection & Privacy

Secure data and demonstrate compliance with sensitivity & protection policies.



4.1 Security of Sensitive Assets

Sensitive Assets are secured via encryption, data obfuscation and data loss program. Controls are evidenced.



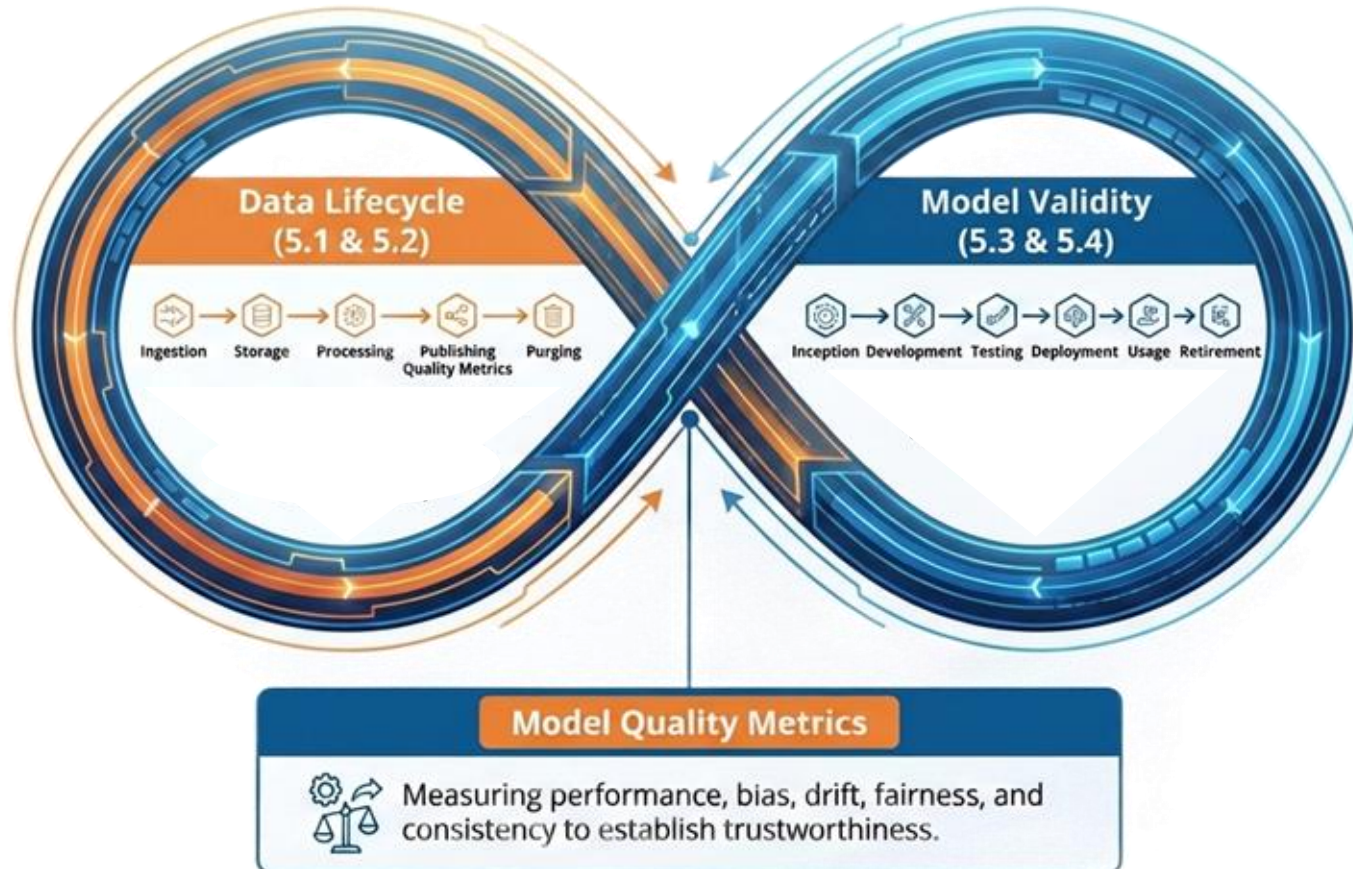
4.2 Data Privacy Framework

An operational Data Privacy Framework and Automated Data Protection Impact Assessments for personal data according to jurisdiction.

5. Data Lifecycle & Model Validity

Ongoing monitoring for Bias, Drift and Performance

A data lifecycle management framework



A model lifecycle management framework

6. AI, Data & Technical Architecture

Architecture that enables resilience, transparency and interoperability

6.1 Technical Design Principles



Optimization of cloud use, including cost and environmental impact

Principles for availability, resilience, backup & recovery, portability and exit-planning.

6.2 Audit Trail, Provenance & Lineage

Track and manage data lineage with automation, reporting and visualization

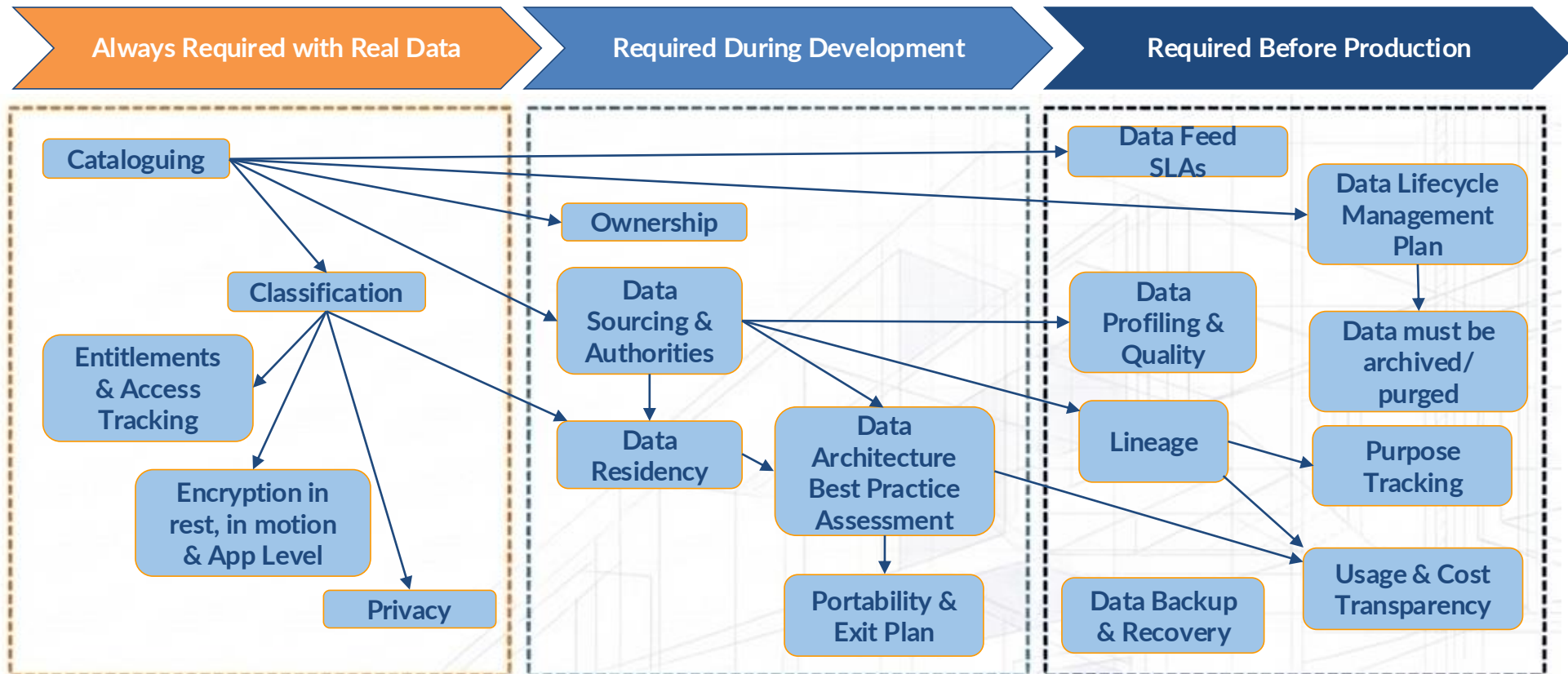
Capture model lineage for transparency & explainability

Link metadata to deployment architecture information



Where to Begin

Here is a suggested order of implementation or capabilities, considering the life cycle of development of AI and Data Analytic systems:





CDMC+AI Adoption examples

- 1) Enterprise AI Governance framework**
 - Examples from WG participants
- 2) AI control advisor using CDMC+AI**
 - TNE.ai Compass Demo



Automating CDMC+AI Compliance with TNE Compass

About TNE Compass:

A robust enterprise AI platform with **1,086+ specialized skills** covering every vital business function:

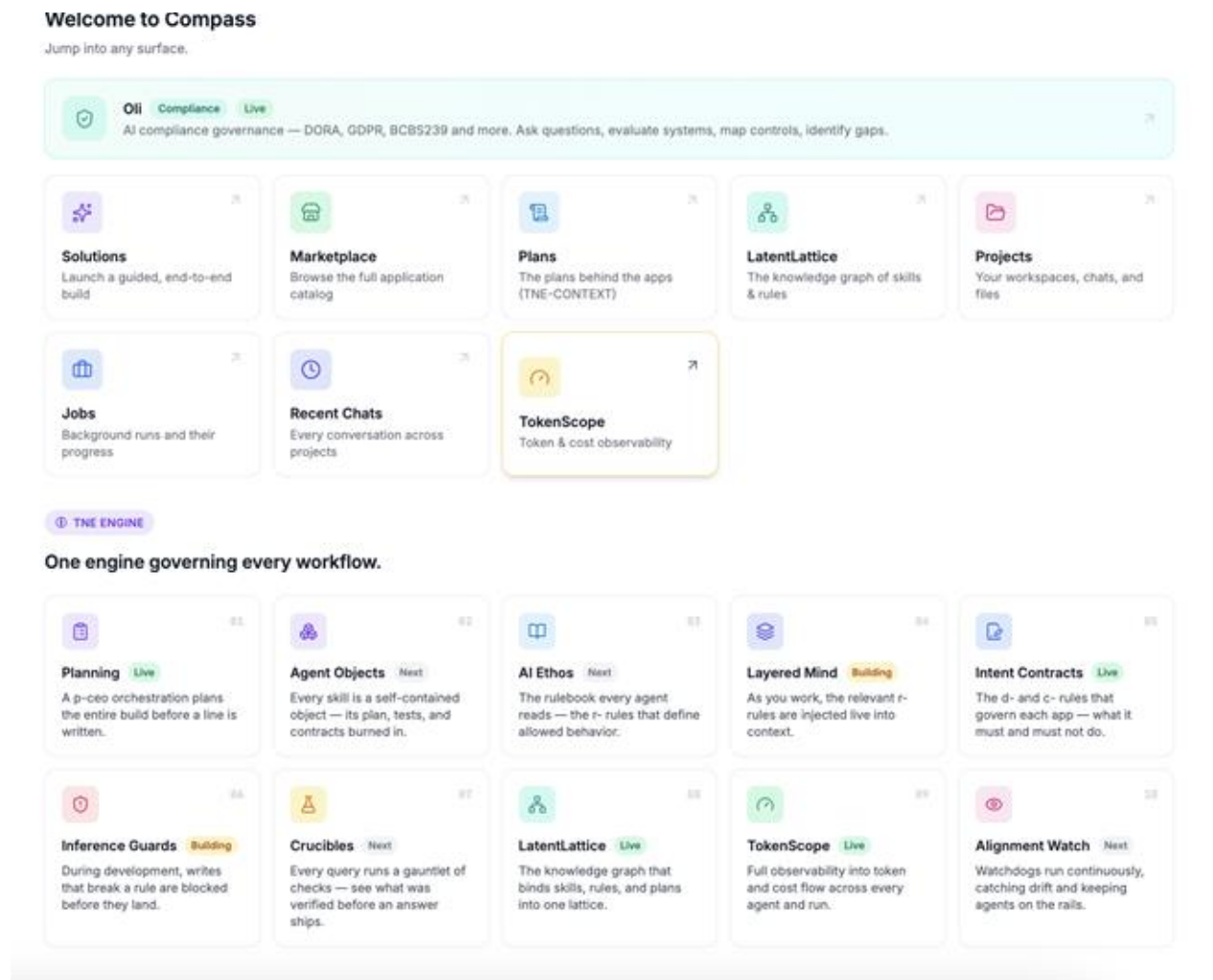
- CEO, CTO, CMO, CISO
- Legal, Finance, HR

Each skill acts as a structured expert agent capable of research, writing, analysis, and cross-organization action.

Compliance & Governance bot

A specialized advisor built on top of TNE Compass that grounds answers in live knowledge:

- Ingests new regulatory frameworks dynamically
- Runs deep cross-framework audits
- Generates complex evaluations and formal reporting
- Ensures complete lineage tracing and audit trails



Contact TNE by scanning the QR code and visiting the website or emailing info@tne.ai

Automating CDMC+AI Compliance with TNE Compass

Video demo – This is not captured on the DataVision recording; please login to EDMConnect and the ADAC group page to see the demo

Compass

Compass Core

Projects

Recent Chats

Solutions

Marketplace

Plans

Admin Dashboard

LatentLattice

Jobs

GitHub Enrollments

Terminal

Settings

Cameron Chen

p-oli-main

what can you do and what frameworks do you know about?

Worked through 8 steps · 39s

Connected — 8 frameworks loaded:

artificial_intelligence_act, dora, dprod, adac, artificial_intelligence_risk_management_framework(ai_rmf_1_0), cis_critical_security_controls, cloud_data_management_capabilities(cdmc)_framework, nist_cybersecurity_framework(csf)_2_0

Hello! I'm Oli, your compliance governance advisor. Here's what I can help you with, and what I know:

Frameworks in the database

Ask me anything... (type / for commands)

+

Activity

Reasoning

AI Sonnet 4.6

No file open

main

AI, Data & Analytics Capabilities built on CDMC automated controls

Specialised capabilities to govern & manage analytics & AI use cases

ANALYTICS



USE CASE: Ethical Purpose/Intent, Use and Outcomes

8



ETHICS & PRIVACY: Impact Assessments

10



PERFORMANCE: Model Quality Controls

15



RISK: Control Metrics

1



AUDIT: Lineage, Transparency, Versioning and Reproducibility

13

Common capabilities for managing data & analytics assets

DATA & ANALYTICS



Sources and Distributors

3



Cataloguing

5



Entitlements and Access for Sensitive Assets

7



Security Controls

9



Quality Measurement

11



Ownership

2



Data Sovereignty and Cross-Border Movement

4



Classification

6



Retention, Archiving and Purging

12



Cost & Sustainability Metrics

14

DATA

1 A Data Control Compliance Metric must be produced for all data assets containing sensitive data

3 A register of Authoritative Sources and Authorized Distributors must be populated for all data assets containing sensitive data

5 Cataloguing must be automated for all data at point of creation or ingestion

7 Entitlements and Access for Sensitive Data must be defaulted to creator and owner and all access must be tracked

9 Security Controls must be enabled for sensitive data and evidence must be recorded

11 Data Quality Measurement must be enabled for sensitive data with metrics distributed when available

13 Data Lineage information must be available for all sensitive data

2 The Ownership field in a data catalog must be populated for all sensitive data

4 The Data Sovereignty and Cross-Border Movement of sensitive data must be recorded, auditable and controlled according to defined policy

6 Classification must be automated for all data at point of creation or ingestion and must be always on

8 Data Consumption Purpose is required for all Data Sharing Agreements involving sensitive data

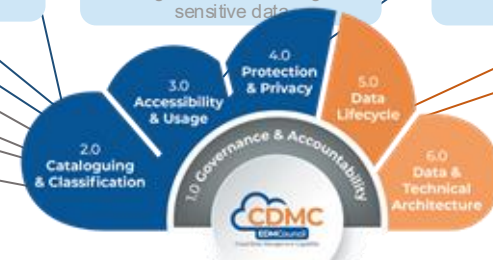
10 Data Privacy Impact Assessments must be automatically triggered for all personal data according to its jurisdiction

12 Data Retention, Archiving and Purging must be managed according to a defined retention schedule

14 Cost Metrics directly associated with the use, storage and movement of data must be available in the catalog

Classification of Sensitive Assets includes:

- Personal Information (PI) / Sensitive Personal Data
- Personally Identifiable Information (PII)
- Client Identifiable Information
- Material Non-Public Information (MNPI)
- Specific Information Sensitivity Classifications (such as 'Highly Restricted' and 'Confidential')
- Critical Data Elements used for important business processes
- Licensed data
- Model IP [new]
- EU AI Act High Risk intended use models [new]



For more detail see the CDMC+ Analytics working document
https://docs.google.com/document/d/1Cg_8a0RStl550epwDGk_IBwG6ui8fGrB/



AI, Data & Analytics Capabilities built on CDMC automated controls

Specialised capabilities to govern & manage analytics & AI use cases

ANALYTICS



USE CASE: Ethical Purpose/Intent, Use and Outcomes must be respectively scoped & aligned, disclosed, and governed for all sensitive assets

8



ETHICS & PRIVACY IMPACT: Assessments must be automatically triggered, or revisited, for personal, group, community & societal outcomes, and data processing (inc indirect or proxy variables), according to its jurisdiction

10



PERFORMANCE: Model Quality Controls must be enabled, and ongoing, for sensitive assets with metrics distributed alongside assets as applicable (inc bias, drift, performance)

15



RISK: A Risk Control Compliance Metric must be produced for all sensitive assets

1



AUDIT: Lineage, Transparency, Versioning and Reproducibility information must be available for all sensitive assets, including traceability of data & functional lineage, and appropriate model transparency & explainability

13

Common capabilities for managing data & analytics assets

DATA & ANALYTICS



A register of **Authoritative Sources and Authorized Distributors** must be populated for all **assets** containing sensitive data

3



Cataloguing must be automated for all assets (data, **models & other artefacts**) at point of creation or ingestion

5



Entitlements and Access for Sensitive Assets must be defaulted to creator and owner, and all access and use must be tracked

7



Appropriate Security Controls must be enabled for sensitive assets and evidence must be recorded, **inc vulnerability assessment for inputs & outputs**

9



Quality Measurement must be enabled for sensitive assets with metrics distributed alongside assets as applicable (inc accuracy, completeness, timeliness)

11



The **Ownership field** in a catalog must be populated for all sensitive **assets**

2



Data Sovereignty and Cross-Border Movement of sensitive assets must be recorded, auditable and controlled according to defined policy (including data localisation and **software export rules**)

4



Classification must be automated for all assets at point of creation or ingestion and must be always on

6



Retention, Archiving and Purging, must be managed according to a defined framework

12



Cost & Sustainability Metrics directly associated with the compute, storage and movement of assets must be available in the catalog and **used to optimise design**

14

DATA

1

A **Data Control Compliance Metric** must be produced for all data assets containing sensitive data

3

A register of **Authoritative Sources and Authorized Distributors** must be populated for all data assets containing sensitive data

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Cataloguing must be automated for all data at point of creation or ingestion

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Security Controls must be enabled for sensitive data and evidence must be recorded

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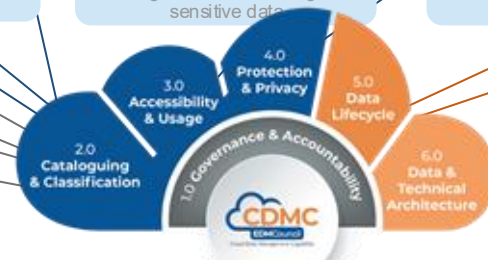
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- Specific Information Sensitivity Classifications (such as 'Highly Restricted' and 'Confidential')
- Critical Data Elements used for important business processes
- Licensed data
- Model IP [new]
- EU AI Act High Risk intended use models [new]





CDMC + AI Next Steps

Join the CDMC+AI community: Monday 3pm
See EDM Connect for more

Up next:
AI Governance group collaboration on
operationalising ADAC

Agenda – Gold In Gold Out: Building Trusted Data to Optimize AI



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PANEL

Reigniting BCBS 239 in the Age of AI: Why Risk Data Matters More

Moderator



Stella Cabrera

Senior Advisor, Global Strategic
Relations & MENA Lead



Dominic Sanchez

Global Data Programs
Delivery Director



Scott Beange

Head of Data Management &
Cyber Strategy



BCBS239 Overview



14

BCBS239 Principles

BCBS239 is a regulation introduced by the **Basel Committee on Banking Supervision** to strengthen banks' risk data aggregation and **reporting**. It outlines **14 principles** that globally and domestically systemically important banks (G-SIBs & D-SIBs) must follow to **improve decision-making, enhance crisis responsiveness**, and ensure **sound risk governance**.

BCBS239 PRINCIPLES

Governance & Architecture

- 1: Governance
- 2: Data Architecture & IT Infrastructure

Risk Data Aggregation

- 3: Accuracy & Integrity
- 4: Completeness
- 5: Timeliness
- 6: Adaptability

Risk Reporting

- 7: Accuracy
- 8: Comprehensiveness
- 9: Clarity & usefulness
- 10: Frequency
- 11: Distribution

Supervisory Review

- 12: Review
- 13: Remedial action and supervisory measures
- 14: Home/host cooperation

ECB'S Areas of Concern

- Accurate data lineage
- Responsibility of the management body
- Scope of the data governance framework
- Roles and responsibilities for data governance
- Group-wide integrated data architecture
- Effectiveness of data quality controls
- Timeliness of internal risk reporting
- Effective implementation programs

Common Challenges

- Data Lineage
- Data Quality and Integration
- Infrastructure Limitations
- Organizational Alignment
- Data Governance and Ownership

BCBS 239 Working Group



BCBS 239 Survey



**Path : EDM Connect >
Collaborate > Data Risk > BCBS
239 Working Group**

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PANEL

The Data Excellence Gym: Coaching Your Business to AI Fitness

Moderator



Roberto Maranca

Energy Management
Data Officer



Paulomi Shah

Head of Cross Domain Services,
Data Glossary and Taxonomy
Standards



Sholthana Begum

Senior Director
Technology and Digital



Kyle Morton

Chief Operating Officer



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CLOSING REMARKS

“Gold In, Gold Out”



John Bottega
President



Kyle Morton
Chief Operating Officer



Thank you
to ALL our attendees!





Thank you
to our speakers...





James Dallas
HEAD OF INVESTMENT BANK
CHANGE, UBS



Emma York
CORPORATE CDO & HEAD OF
ENTERPRISE INFORMATION
GOVERNANCE, LSEG



Chiara Brown
REGIONAL ADVOCATE, EMEA,
EDM ASSOCIATION



Sian McHenry
GROUP DATA GOVERNANCE
DIRECTOR, NATIONWIDE
BUILDING SOCIETY



Aga Strandskov
HEAD OF DATA STRATEGY,
DIGITAL ISLE OF MAN



Lyle Wraxall
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Scott Beange
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& CYBER STRATEGY,
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Predrag Dizdarevic
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Tom Truman
VICE PRESIDENT, SOLIDATUS



Oli Bage
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TRADING PLATFORM
ARCHITECTURE AT G-
RESEARCH



Rob Wentz
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MANAGEMENT, EDM
ASSOCIATION



Ben Clinch
DATA, AI AND ARCHITECTURE
ADVOCATE



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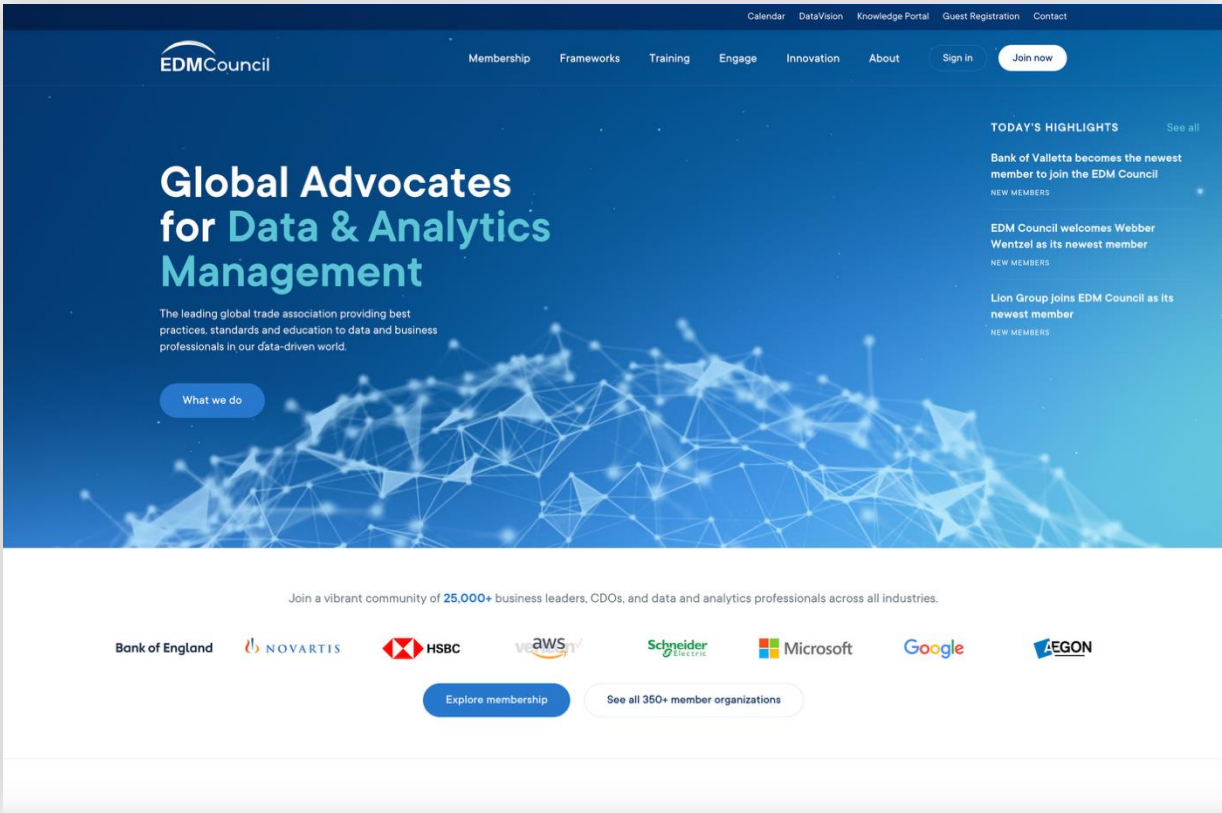


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