



WATER SERVICES
ASSOCIATION OF AUSTRALIA



intelligent
water
networks *10+*
years

Digital Metering State of Play Summary Report

OCTOBER 2022



Does your organisation have a digital metering strategy?

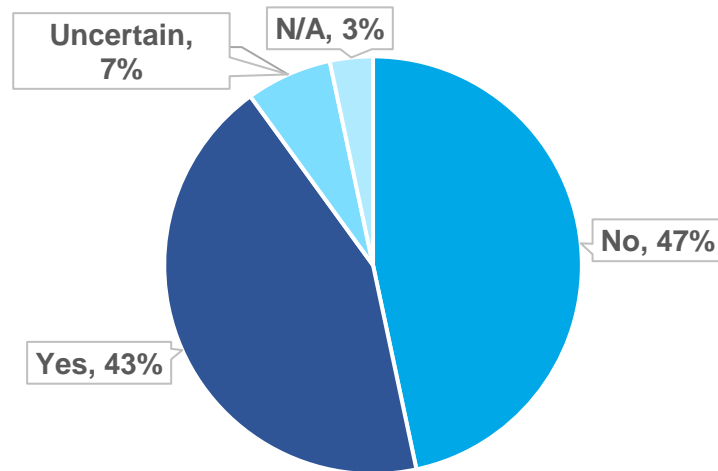


Figure 1 Organisations having a digital metering strategy

Are you willing to share your digital metering strategy with the Working Group?

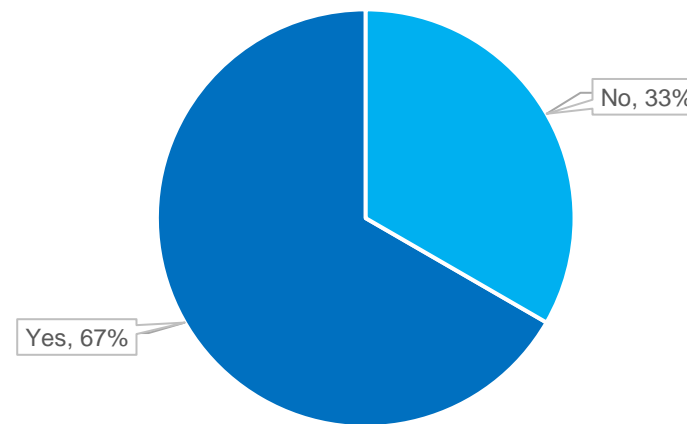


Figure 2 Organisations willingness to share their digital metering strategy

Observations:

- 36 responses received from 30 water corporations and councils.
- A number of regional organisations with known rollouts did not respond
- One large metro utility and two New Zealand utilities did not respond



Do you have Executive Support?

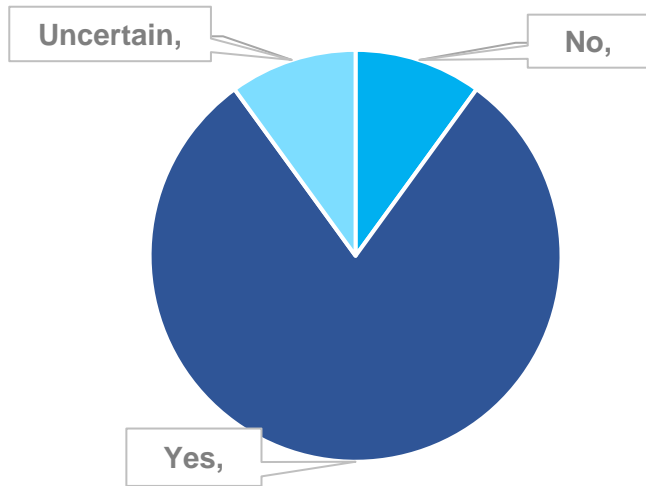


Figure 3 Executive support for digital metering is considerable

Do you have a Champion working on Digital Metering?

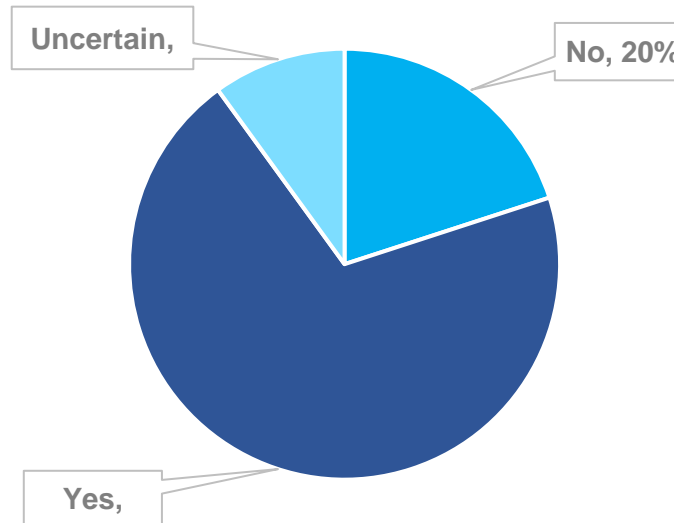


Figure 4 Most organisations can identify a champion for digital metering

Observations:

While most organisations have either Executive Support or a Champion, the number that had both was only 63% (19 of 30).

Where are you at with Digital Metering?

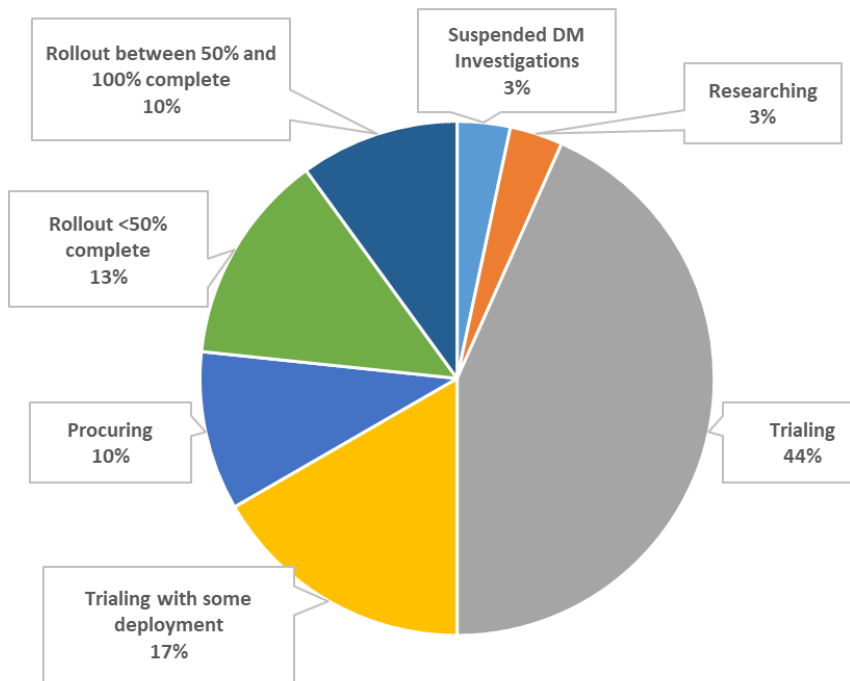


Figure 5 Assessed status of Digital Metering Project

Are there any drivers for your digital metering implementation?

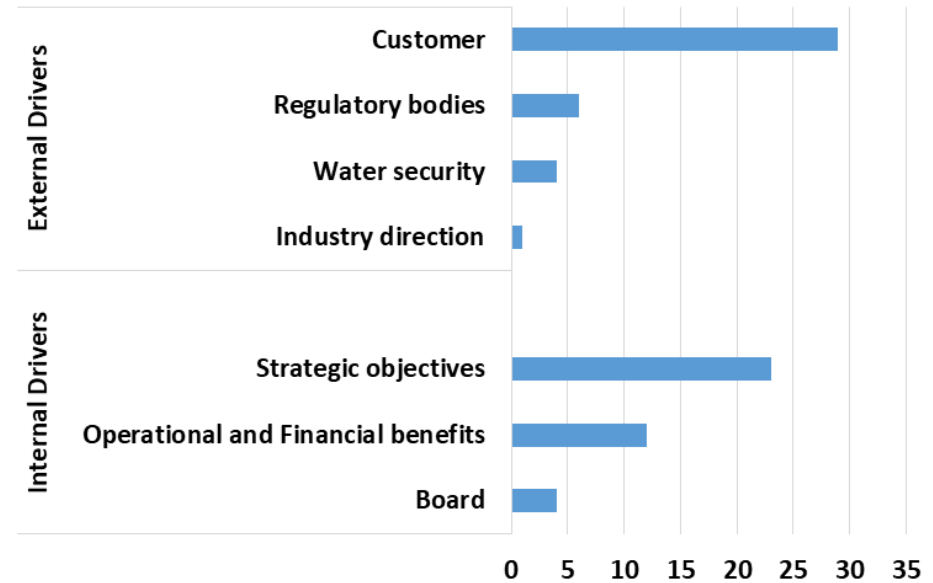


Figure 6 Organisations' priorities for Digital Metering Implementation

Observations:

Digital metering is seen predominantly to deliver against organisational objectives and customer expectations and benefits

What are the roadblocks/ major challenges to get digital metering up and running at your organisation?

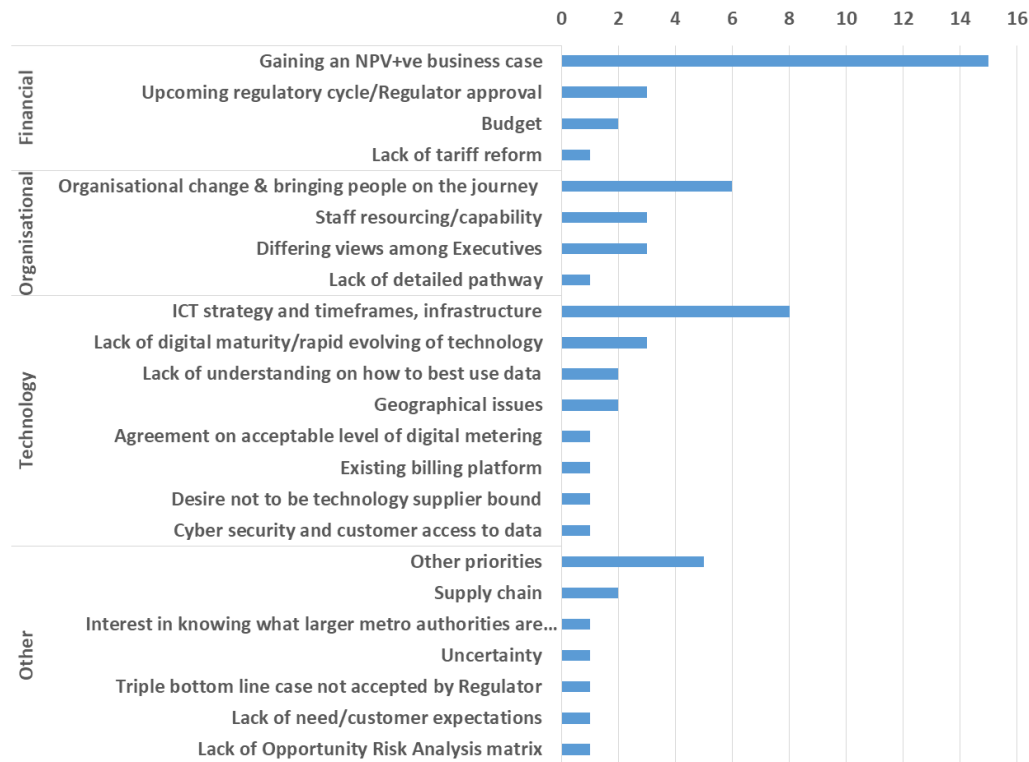


Figure 7 Roadblocks and challenges faced by the 30 organisations in moving forward with digital metering

Projected total digital meter deployment

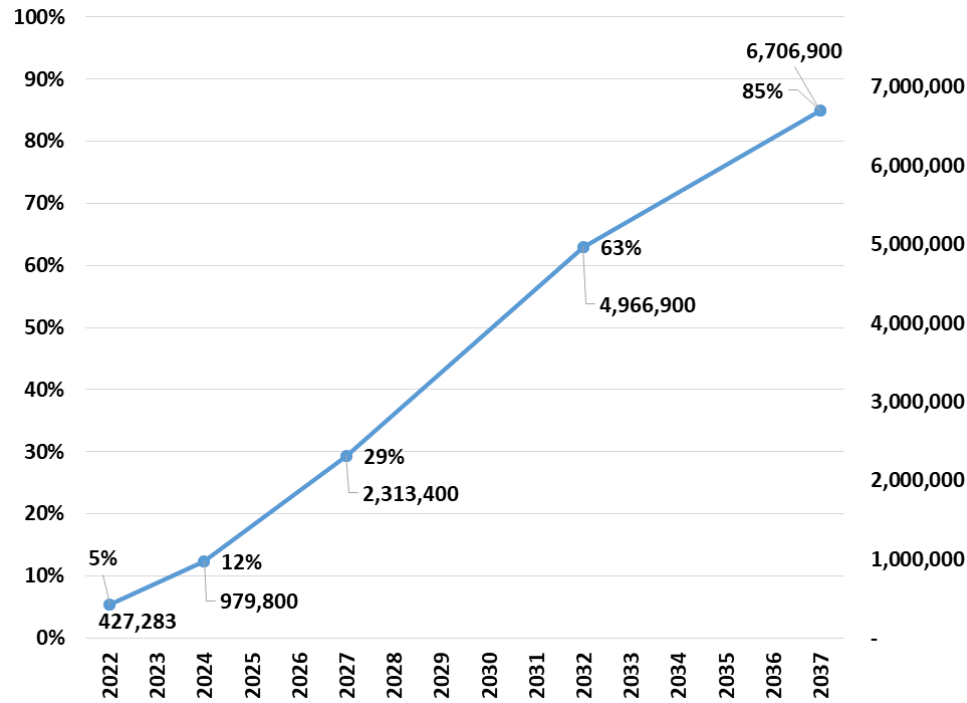


Figure 8 Total number of digital meters (rounded to nearest 100) and % of all responding organisations' fleet in 2, 5, 10 and 15 years

Observations:

30 responding organisations only. These figures understate both the current rollout and the 15-year rollout because of the missing data from organisations that did not respond and population growth (not requested).



Summary of Observations

Thirty responding water organisations provided an insight into their digital metering projects as at end-June, 2022.

One major Australian utility and a number of regional Councils with known rollouts and two New Zealand utilities did not respond.

Most organisations

- Enjoy Executive support
- Have a digital metering champion
- Are still at the trialling stage – three had achieved substantial rollouts, another seven have rollouts progressed or are currently procuring
- Identified difficulty in achieving a NPV positive business case as the main challenge
- Use trials to attempt to quantify the benefits
- The technology continued to be a focus rather than the business and customer benefits

Many organisations

- Considered the technology immature despite digital metering being used for over 20 years
- Were caught in a continuous loop of technology assessment
- Wanted additional sensors on digital meters

Some organisations

- Have concerns about feature creep on digital meters and the adverse impact on meter costs
- Consider vested interests among some organisations also acting as vendors “corrupted the exchange of ideas and experiences” without having installed in volumes themselves

Innovative approaches to manage project costs such as leasing meters, creating buying groups and minimalist implementations were not evident.

The current business environment (government commitment to climate change action targets, labour shortages, rising inflation and borrowing costs, increased customer expectations in a digital world and interest in personal contribution towards climate change action) provide fertile ground for digital metering implementation.

Survey conducted by the Intelligent Water Networks and Water Services Association of Australia. Analysis and comments provided by Dr. Ian Monks