MOSL
MARKET OPERATOR SERVICES LTD

Future options for metering roles and responsibilities in the non-household water market

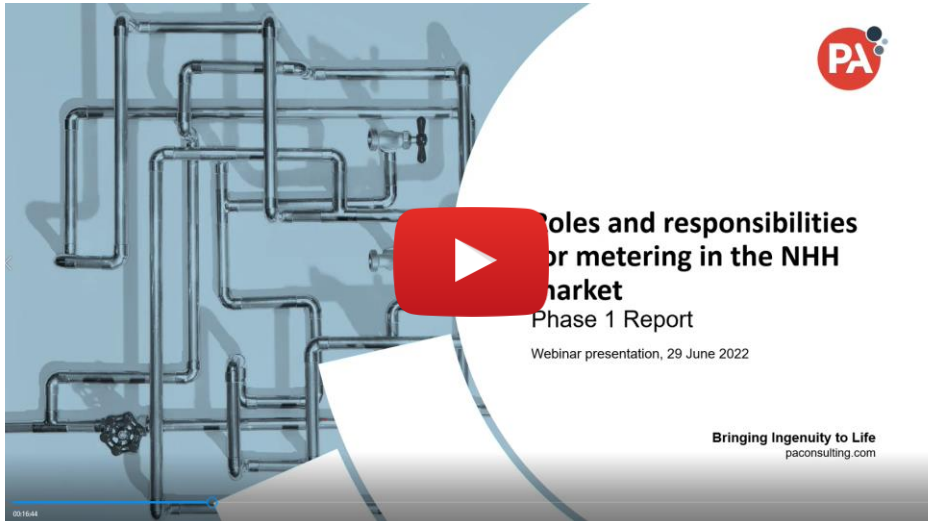
Webinar presentation

29 June 2022

Shaun Kent, Ofwat
John Davies, CIO MOSL
Martin Hall, Programme Lead, MOSL
Claire Yeates, Sponsor (Waterscan)
Marc Tritschler, PA Consulting
Gareth Forrester, PA Consulting

Agenda and timings

- Recording of webinar on 29 June 2022 here (see time stamps on next slide)
- PA Consulting report on MOSL website here
- Consultation questionnaire form here
- Please return form by Friday 22 July 2022
- Any questions: comms@mosl.co.uk



oles and responsibilities
or metering in the NHH
arket

Phase 1 Report

Webinar presentation, 29 June 2022

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Agenda and timings

		Timestamp
Opening remarks	Ofwat	00:01:15
Market context	MOSL	00:03:42
Strategic Metering Review	MOSL	00:08:00
Purpose of today	Waterscan (sponsor)	00:11:55
Research findings	**PA Consulting (process)**	**00:15:20**
	PA Consulting (12 options)	**00:27:00**
	PA Consulting (pros and cons)	**01:00:00**
Prioritisation discussion/questions	MOSL	01:12:10
Next steps and close	MOSL	01:27:30

Shaun Kent
Performance and Outcomes

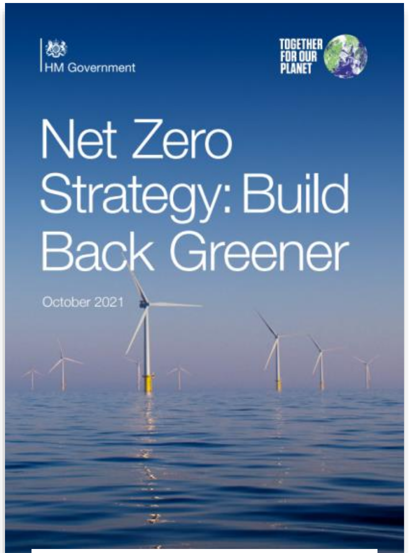
Market context and drivers for change

John Davies
Chief Information Officer, MOSL

The NHH market: improved data = improved service

- Market opened to:
  - Provide choice and improve customer service
  - Reduce costs, including via water efficiency
- The market today:
  - Circa. 70 wholesalers and retailers
  - 1.2 million eligible customers
  - 3ML (3bn litres) per day - 30% of England & Wales' total
  - Most NHH customers very small, but largest 1% consume half of total NHH water
- Accurate, timely consumption data from meters is key to:
  - Accurate, consumption-based bills
  - Tackling long unread meters
  - Identifying and fixing leaks
  - Developing innovative tariffs
- Which requires
  - Investment in enhanced metering technology
  - Ensuring the market is structured correctly, e.g. roles and responsibilities

Multiple drivers for change



HM Government

TOGETHER FOR OUR PLANET

Net Zero Strategy: Build Back Greener

October 2021

Net zero climate change agenda

Retail Exit Code

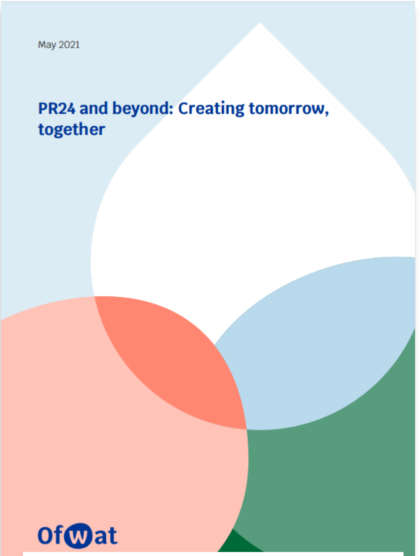
Retail Exit Code

Issued by the Water Services Regulation Authority pursuant to Regulation 30 of The Water and Sewerage Undertakers (Exit from Non-household Retail Market) Regulations 2016

Effective on 1 April 2020

Ofwat

Retail Exit Code Review



May 2021

PR24 and beyond: Creating tomorrow, together

Ofwat

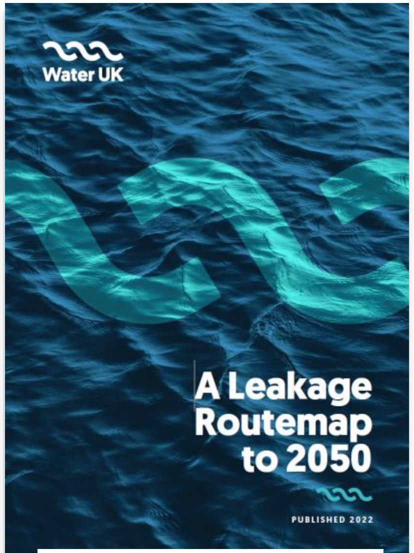
PR24 (AMP7) and beyond

Department for Environment Food & Rural Affairs

Consultation on environmental targets

Date: 16 March 2022

Tightening environmental targets



Water UK

A Leakage Routemap to 2050

PUBLISHED 2022

Wholesalers' leakage reduction commitments

Regulatory > Environmental > Societal > Consumer pressure > Technological > Operational

"Significant issues regarding poor quality customer, consumption, and asset data continue to persist in the [NHH] market"

Ofwat 'State of the Market' Report, December 2021

The Strategic Metering Review

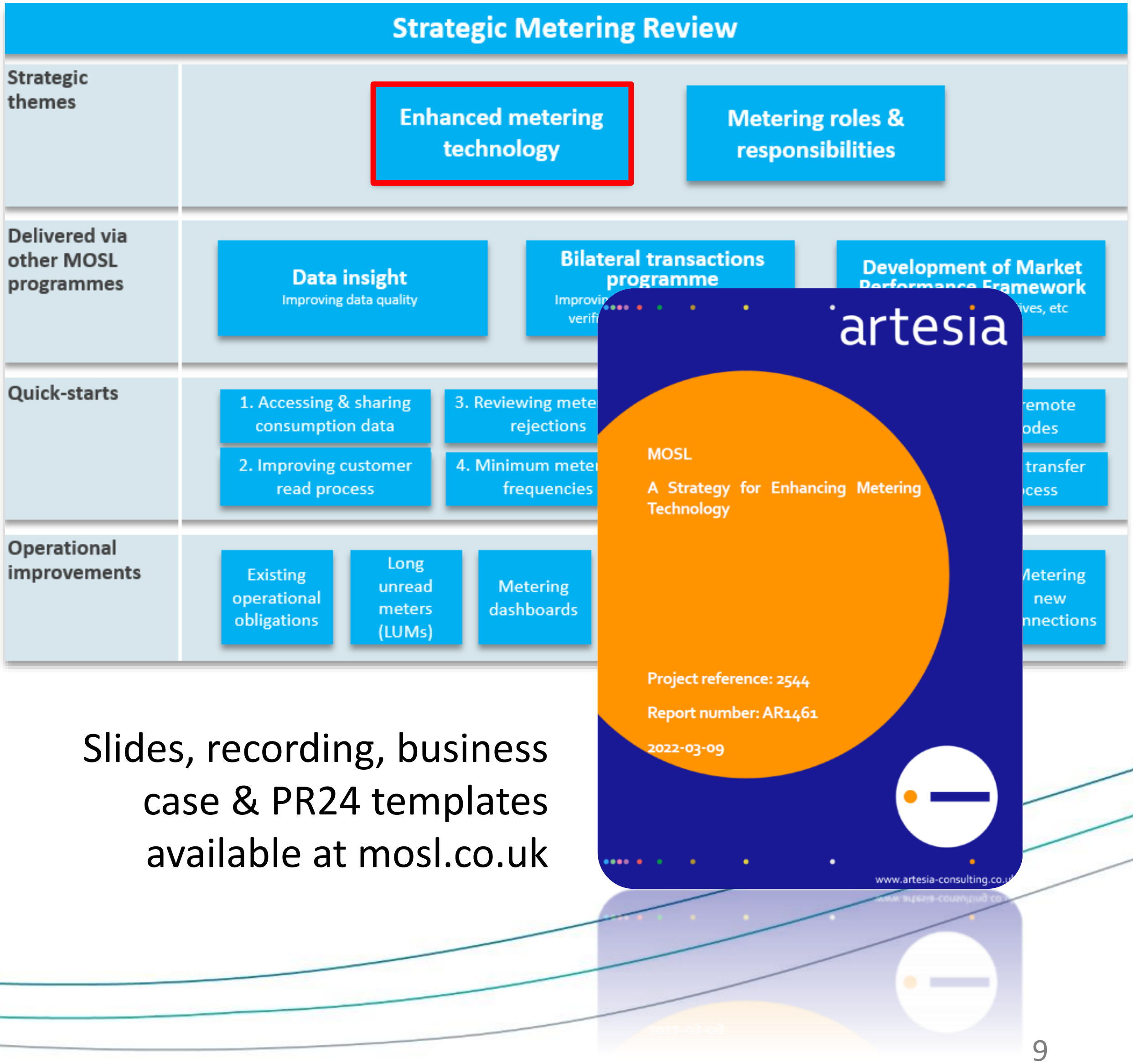
Martin Hall
Programme Lead, MOSL

Strategic themes in context

Theme 1: Enhanced Metering Technology

Research findings (recap):

- Strong benefit case for rolling out enhanced metering technology to NHH customers
- Companies planning to upgrade or roll out domestic smart meters should include NHH
- Companies without large-scale investment programmes would benefit from upgrading selected NHH meters, e.g. largest and/or in close proximity
- Common data output standards and frameworks will be at least as important as particular technolog(ies)

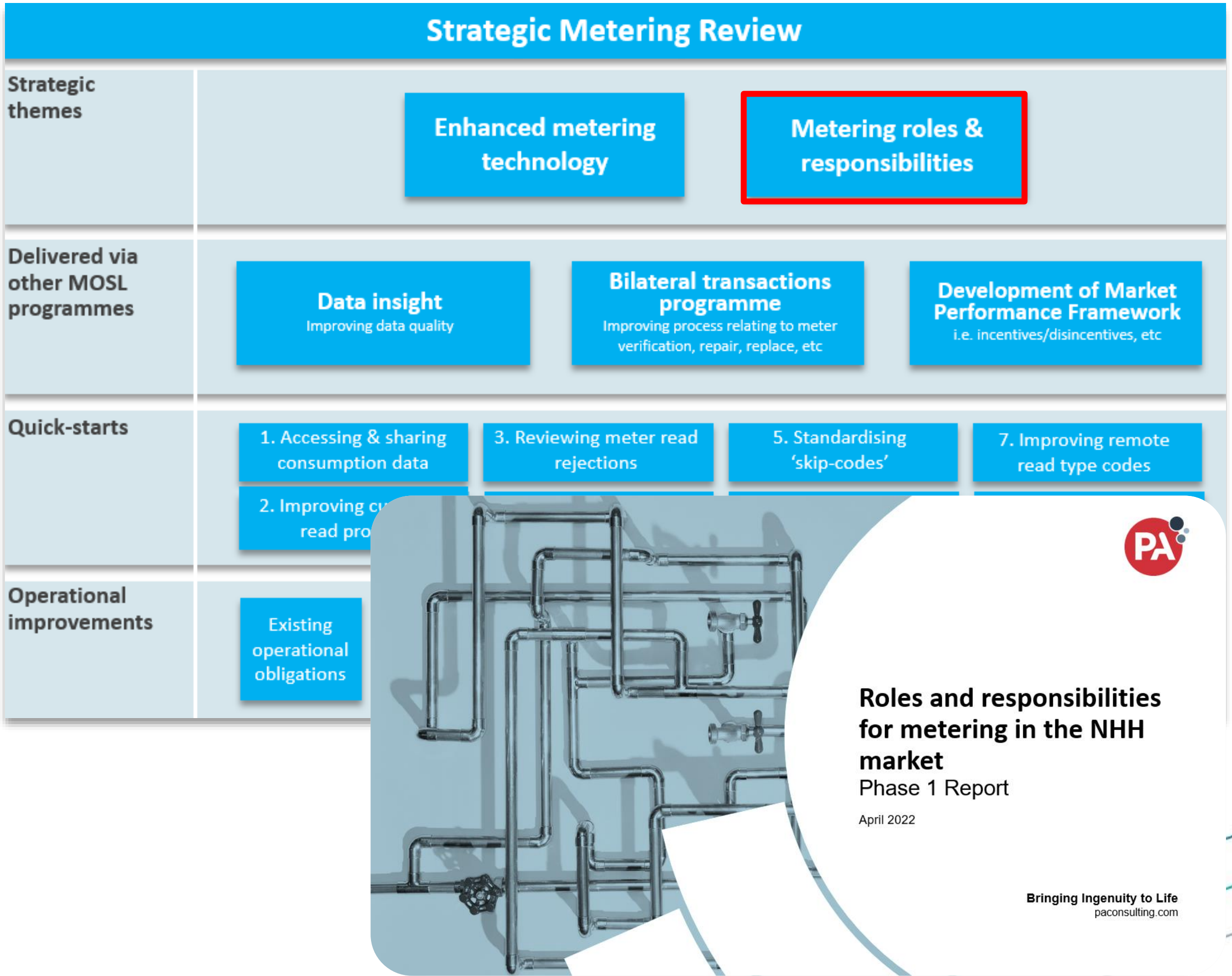


Slides, recording, business case & PR24 templates available at mosl.co.uk

Strategic themes in context

Theme 2: Roles and responsibilities:

- What are the potential advantages of changes to roles and responsibilities?
- How might they help resolve current issues?
- What might they mean for the evolution of the market?
- How would we evaluate options and what could a long-list include?
- What challenges would we need to address to achieve the best outcome?
- What are the pros and cons of each?
- What could a priority order look like?



Strategic Metering Review

Strategic themes
- **Enhanced metering technology**
- **Metering roles & responsibilities**

Delivered via other MOSL programmes
- **Data insight** Improving data quality
- **Bilateral transactions programme** Improving process relating to meter verification, repair, replace, etc
- **Development of Market Performance Framework** i.e. incentives/disincentives, etc

Quick-starts
- 1. Accessing & sharing consumption data
- 3. Reviewing meter read rejections
- 5. Standardising 'skip-codes'
- 7. Improving remote read type codes
- 2. Improving cu read pro

Operational improvements
- Existing operational obligations

Roles and responsibilities for metering in the NHH market
Phase 1 Report
April 2022
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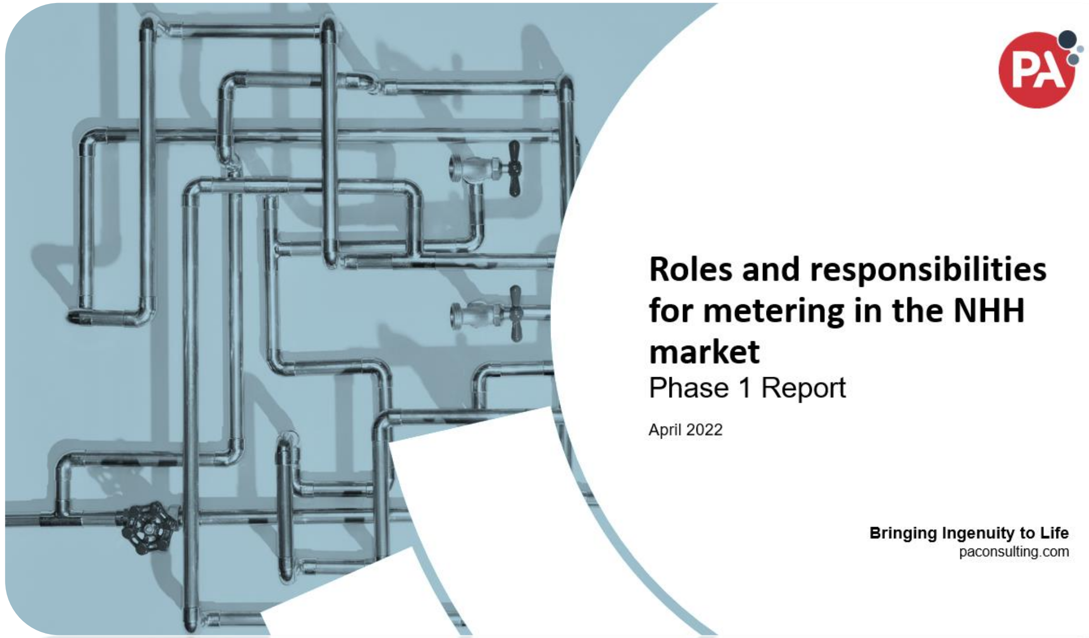
Purpose of today

Claire Yeates, Waterscan
Programme Sponsor

Purpose of today

- To focus on metering-related roles and responsibilities in the NHH market
- Share the long list of options and ask:
  - Any options we have missed?
  - Any that can be disregarded?
- Get your *initial reactions* to draft priorities
- Explain how to submit your feedback
- What happens next



Roles and responsibilities for metering in the NHH market
Phase 1 Report

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The start of a multi-stage process

Phase 1: Dec 2021-June 2022

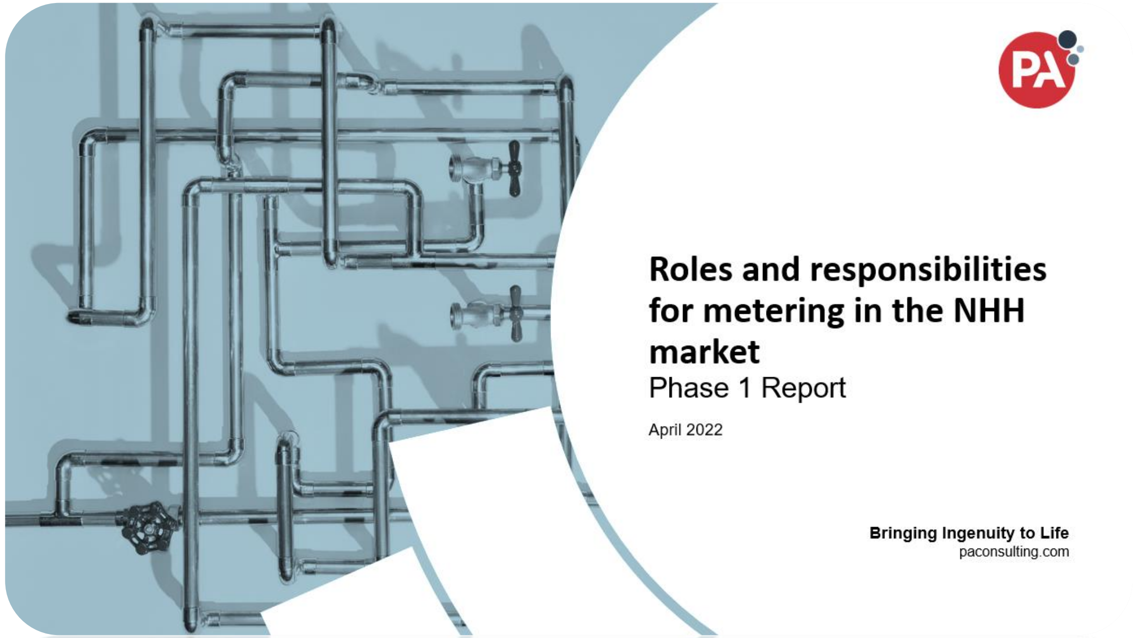
- Research by PA Consulting to determine options
- Publish the ‘long list’ of options and invite feedback

Phase 2: July-March 2023

- Determine evaluation criteria
- More detailed analysis of options
- Share outputs with the market
- Implementation planning

Phase 3: April 2023 onwards

- Begin implementation(s)



PA

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Phase 1 Report

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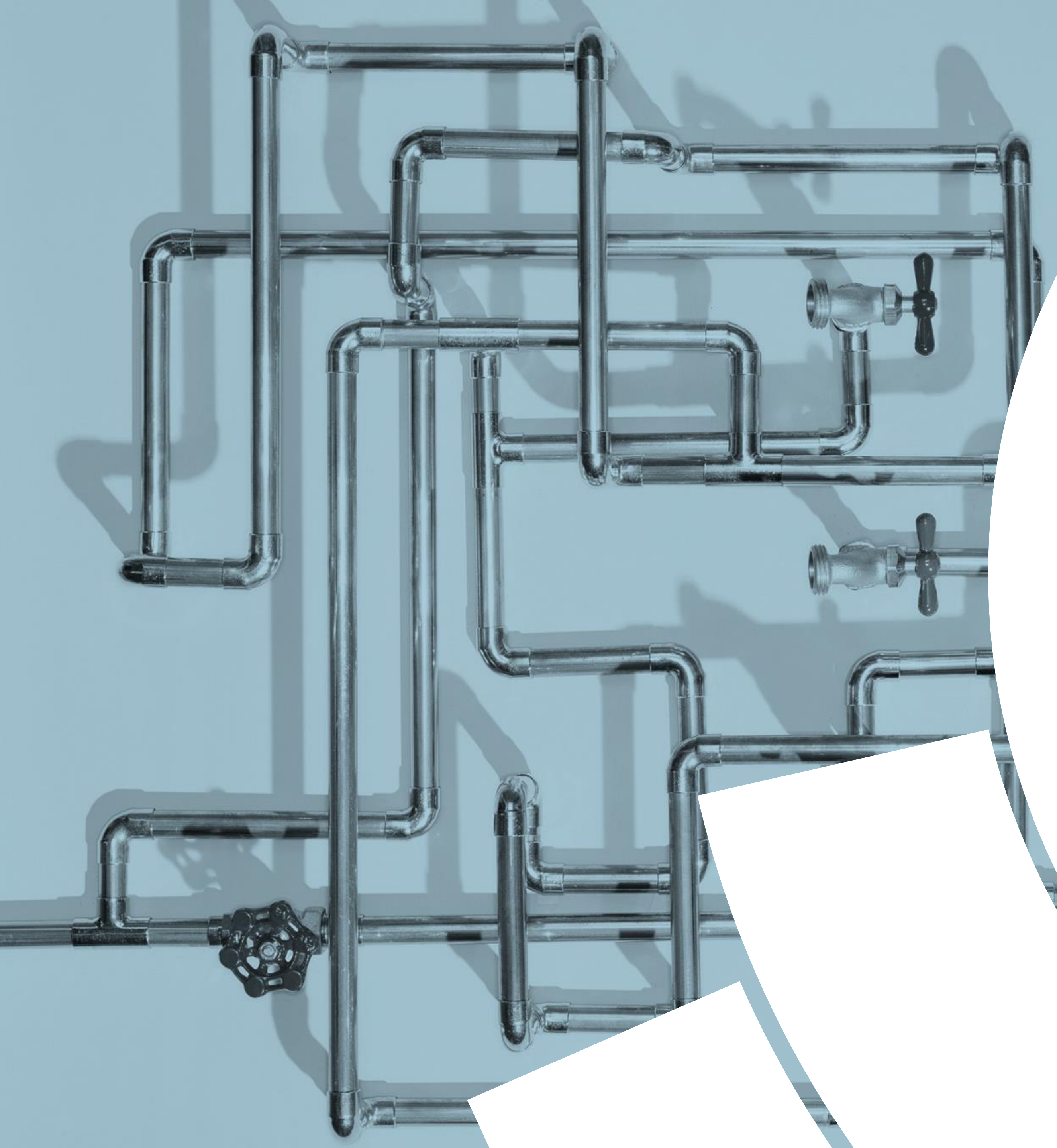
Please remember

- This is the beginning of a *process*
- And the start of the *conversation*
- There is no ‘magic wand’ when it comes to meters and metering issues, so let’s:
  - Consider what options could mean for customers, the environment and the market – *not* just your organisation or sector
  - Keep an open mind and as many options ‘on the table’ as possible
  - Not rush to rule out options because they might be “too difficult” or “too expensive” to implement – these will be considered at the next stage.

Research findings and options appraisal

PA Consulting
Marc Tritschler, Gareth Forrester



Roles and responsibilities for metering in the NHH market

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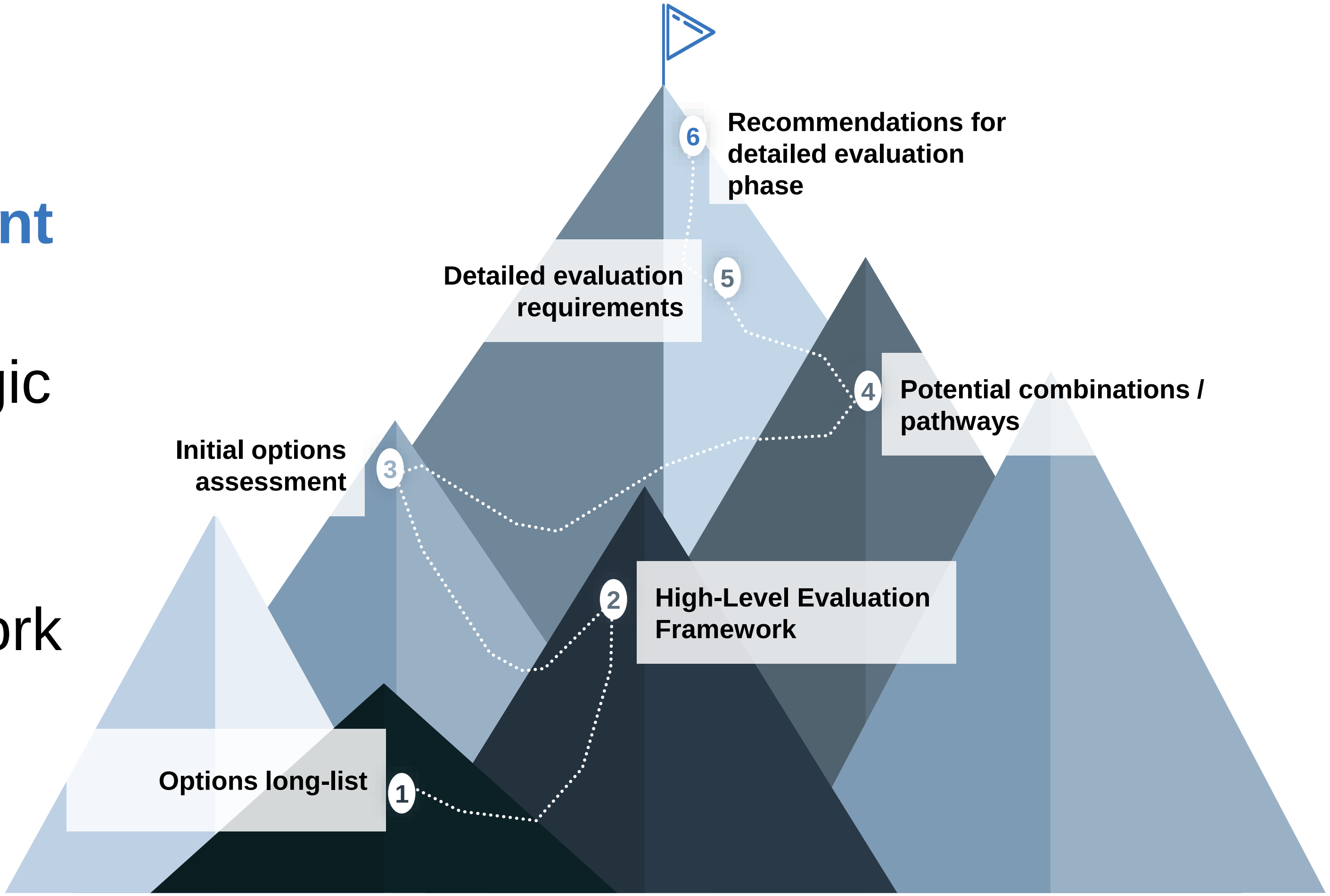
Scope and objectives of initial phase

Identify options and lay foundations for detailed evaluation and wider engagement

- Define longlist of options across key areas of focus for the Strategic Metering Review (SMR)
- Identify potential pros and cons
- Develop an assessment framework for the options to be assessed in detail



Initial findings

The advantages identified across the options could resolve current issues, and enable substantive market evolution

- Potential to expedite resolution of current metering market and asset data issues - leading to better customer outcomes
- Enabling greater economies of scale
- Accelerating market evolution toward smarter technologies and data sharing
- Enabling retailers greater choice and ability to offer smart-enabled service offerings
- Support wider initiatives such as water efficiency

There are some challenges which would need to be addressed for some options, to achieve the optimal outcome

- Possible negative customer impacts
- Major regulatory, operational and commercial changes
- New monopoly roles and activities
- Complexities such as separation of asset ownership from other roles
- Potentially less cost-efficient approach to smart technology rollout

Initial Findings

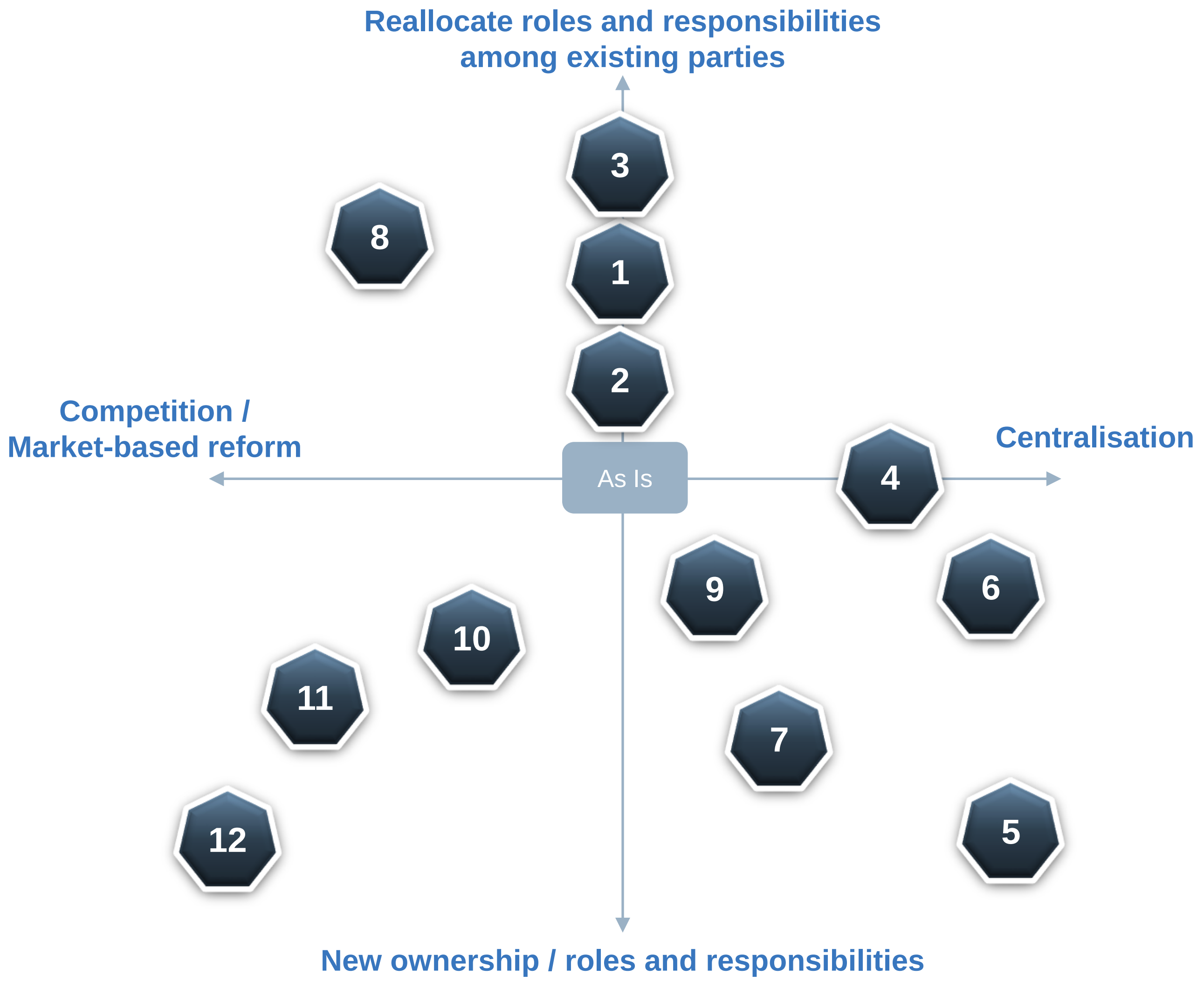
Implementation considerations

- Some options would require a relatively modest change to existing arrangements
- Some would require new systems or services to be developed or procured
- A number of options would have legal and regulatory implications, as well as implications for PR24 price controls and the Retail Price Review.
- There is likely to be a need for Defra/Ofwat sponsorship

Recommended way forward

- The options provide a basis for wider industry and stakeholder engagement
- Additional design, analysis and testing of the options will be required
- An indicative grouping of options that could be prioritised for further evaluation is provided
- The next phase of the review should therefore focus on delivering a fuller objective evaluation of options, including developing the economic case

The options development process considered a range of dimensions – the resulting options therefore vary in nature and focus



Increase responsibilities and incentives to focus on known issues

Place more NHH meter reading responsibilities on Wholesalers

Improve sharing and accessibility of smart meter data

Introduce new metering asset ownership models

Mandates to accelerate smarter technology roll-out in the NHH market

Provide more control/optionality for retailers and customers

Open more areas of metering activity to competition

Options Longlist

Options Longlist	1	2	3
Option	**Wholesalers responsible for all market meter reads**	**Wholesaler Reads (Defined circumstances only)**	**Wholesaler Reads and data service (smart meters only)**
At a glance	Wholesalers obliged to submit reads on behalf of market for all meter read types within own Wholesale Area	Meter read responsibility switches to wholesaler in defined circumstances only	Meter read responsibility switches to wholesaler where smart metering is installed
Key features	• No Retailer reads required any longer • Permanent change of role/responsibility from Retailer to Wholesaler	• Wholesaler responsible where e.g. retailer has made number of unsuccessful attempts, evidence of poor location data, etc.) • Once issue resolved, responsibility defaults back to retailer (e.g. location information improved and/or meter moved)	• Hybrid arrangement reflecting that Smart Metering programmes may be delivered over a number of years • Wholesaler takes enduring responsibility for provision of meter read data, plus additional consumption information, via a defined set of standard interfaces
Focus	🟣	🟣 🔴	🟣

Meter Assets (ownership, roll-out, O&M)

Meter Reading (to meet NHH market requirements)

Meter Asset Data

Additional Metering Technology

Metering Data (consumption - enhanced)

Options Longlist

Options Longlist	**4**	**5**	**6**
Option	**Data Platform**	**Integrated / independent meter ownership and data service**	**Full NHH Smart Metering/Technology Rollout**
At a glance	New NHH market-wide data platform to improve access to and standardisation of data for market participants	New market structure with an independent meter asset provider and data platform as a service	Mandated and coordinated smart metering / smarter technologies roll-out programme for all of the NHH market
Key features	• Platform provision likely a new regulated activity, with codified functionality, access rules, charging and service levels • Interface with CMOS for market data submission • Obligation on parties to make data available as smarter technologies deployed	• Data Platform provider also takes on ownership for all meters and enhanced metering technologies (including comms) • Enables end-to-end (meter-to-platform) service for NHH market	• Wholesaler roll-out obligation, but potentially also retailer obligations (e.g. to ensure customer engagement) • Common standards for metering, enhanced metering technologies and potentially comms and data services • Target date for installation at all NHH sites
Focus	● ●	● ● ●	● ● ● ●

Meter Assets (ownership, roll-out, O&M)

Meter Reading (to meet NHH market requirements)

Meter Asset Data

Additional Metering Technology

Metering Data (consumption - enhanced)

Options Longlist

Options Longlist	7	8	9
Option	**Targeted Smart(er) Metering/Technology Rollout**	**Retailers own and are responsible for metering assets**	**Asset data improvement programme**
At a glance	Mandate on wholesalers to deploy smart / enhanced metering technologies at a defined sub-set of premises only	Responsibility for metering assets transferred to incumbent retailer for all NHH SPIDs from a specified date	Centrally-governed programme of initiatives to improve known metering issues
Key features	• Criteria for eligible premises defined in market codes • Potentially based on meter size, known issue (LUM/HTR) or other characteristics (e.g. troughs)	• Retailers responsible for meter reading and all other meter operations • Responsibility transfers between retailers on transfer • Third-party MAP likely to own asset and lease to retailer	• Targeted at issues associated with meter asset data quality and location to address current market frictions • Timebound programme (“one-off blitz”) • Backed with specific Trading Party obligations and performance framework
Focus	🔵 🟢 🟣	🔵 🟣	🔴

Meter Assets (ownership, roll-out, O&M)

Meter Reading (to meet NHH market requirements)

Meter Asset Data

Additional Metering Technology

Metering Data (consumption - enhanced)

Options Longlist

Options Longlist	10	11	12
Option	**Wholesaler smart(er) replacement service offering**	**Retailer/ Customer installation of additional metering technology**	**Competition in metering Non-Primary Services**
At a glance	Retailers can request Wholesaler to install smart meter / enhanced technology and provide access to data.	Enhanced ability / rights for retailer/customer to install own smart equipment (or commission installation by qualified contractor)	Opens up non-primary activities to competition as no longer wholesaler monopoly activity
Key features	• Wholesaler obliged to action requests in line with codified service levels. • Standardised technology and data provision options. • Defined cost sharing mechanism between wholesaler and retailer	• Defined process/conditions for wholesaler to approve • Could include extension of AE schemes • Supported by measures to drive standardisation and accuracy and to prevent wholesaler removing retailer/customer assets	• Measures to enable wider range of parties to carry out all operational tasks in relation to metering equipment (e.g. Retailer-commissioned contractors) • Procurement (possibly centrally) of specialists to expedite resolution of known market issues
Focus	● ● ●	● ●	● ●

Meter Assets (ownership, roll-out, O&M)

Meter Reading (to meet NHH market requirements)

Meter Asset Data

Additional Metering Technology

Metering Data (consumption - enhanced)

Each option was considered through three lenses, to ensure a balanced initial assessment

Strategic

Whether option likely to deliver positive outcomes to NHH market and customers, in wider strategic context of the overall sector policy aims

Stakeholder

A broad range of stakeholder perspectives (current and future)

Management & Implementation

Potential scale, complexity and cost to design, deliver and operate each option

Domain	Assessment criteria
Strategic	1.1 Improved outcomes for NHH customers
	1.2 Improved functioning and enabling evolution of the NHH market (including reduction of frictions and addressing known issues)
	1.3 Alignment with wider strategic and policy objectives for water sector (e.g. contribution to key PR24 aims)
Stakeholder	2.1 Impact on consumers, including cost and service impacts
	2.2 Impact on NHH retailers, competition and market conditions
	2.3 Impact on Wholesalers
	2.4 Impact on MOSL
	2.5 Impact on other businesses – e.g. third party service providers, MAPs/investors etc.
Management & implementation	3.1 Likely scale of effort and change required to design and implement
	3.2 Likely timescales for implementation and benefit realisation
	3.3 Key risks and challenges to implementation
	3.4 Cost to implement and operate
	3.5 Long term maintenance, monitoring and oversight

Options Evaluation Summary – Key Pros and Cons

	1	2	3
Option	**Wholesalers responsible for all market meter reads**	**Wholesaler Reads (Defined circumstances only)**	**Wholesaler Reads and data service (for smart meters only)**
Pros	✓ Potential for better outcomes and operational improvements ✓ Potential to drive NHH smart metering deployment	✓ Could be an effective means to address legacy issues ✓ Preserves existing market design principle	✓ As Wholesalers roll out smart meters, the benefits of the availability of enhanced meter read data are immediately made available to Retailers
Cons	× Possible negative customer impacts × Concerns about service viability for Wholesalers	× Process and rule heavy × Difficult to avoid ambiguity and dispute	× Retailer/customer impact could be significant

Options Evaluation Summary – Key Pros and Cons

Option	4 Data Platform	5 Integrated / independent meter ownership and data service	6 Full NHH Smart Metering/Technology Rollout
Pros	✓ An enabler for market evolution ✓ An efficient solution for data sharing	✓ Accelerating smart deployment ✓ Asset management improvement	✓ Greatest potential for long-term strategic benefits ✓ Smart metering certainty and consistency
Cons	× Systems duplication / added complexity × Implementation cost × Monopoly / Service management	× Potential negative customer impacts from separation of asset ownership and other market roles × Fundamental shift and complexity	× Significant regulatory and implementation burden × Significant funding and coordination requirements

Options Evaluation Summary – Key Pros and Cons

	7	8	9
Option	**Targeted Smart(er) Metering/Technology Rollout**	**Retailers own and are responsible for metering assets**	**Asset data improvement programme**
Pros	✓ **Could deliver early benefits** ✓ **A good fallback option**	✓ **Some increased scope for better service and differentiation**	✓ **Accelerating data improvement and focus** ✓ **Laying foundations for other options**
Cons	× **Inefficient roll-out model** × **Risk of multiple markets**	× **Undermines wider strategic benefits** × **Separated HH and NHH markets** × **Retailer cost impact**	× **Limited scope and impact**

Options Evaluation Summary – Key Pros and Cons

	10	11	12
Option	**Wholesaler smart(er) replacement service offering**	**Retailer/ Customer installation of additional metering technology**	**Competition in metering Non-Primary Services**
Pros	✓ More choice and control for retailers and customers	✓ Greater choice, pace and differentiation for retailers ✓ Improving market operation	✓ Greater competition ✓ Increased capacity to address market issues
Cons	× Limited strategic benefit to market × Inefficient rollout × Low demand	× Risk of stranded assets × Implementation complexity	× Administrative and operational overhead

The resulting options vary in nature and focus

Increase responsibilities and incentives to focus on known issues	2 9
Place more NHH meter reading responsibilities on Wholesalers	1 2 3
Improve sharing and accessibility of smart meter data	4
Introduce new metering asset ownership models	5 8
Mandates to accelerate smarter technology roll-out in the NHH market	6 7
Provide more control/optionality for retailers and customers	10 11
Open more areas of metering activity to competition	12

	Option
1	**Wholesalers responsible for all market meter reads**
2	**Wholesaler Reads (Defined circumstances only)**
3	**Wholesaler Reads and data service (for smart meters only)**
4	**Data Platform**
5	**Integrated / independent meter ownership and data service**
6	**Full NHH Smart Metering/Technology Rollout**
7	**Targeted Smart(er) Metering/Technology Rollout**
8	**Retailers own and are responsible for metering assets**
9	**Asset data improvement programme**
10	**Wholesaler smart(er) replacement service offering**
11	**Retailer/ Customer installation of additional metering technology**
12	**Competition in metering Non-Primary Services**

The report has identified opportunities for beneficial market reform and provides the foundation to work towards a full business case

Activities that should be factored into plans for the next stages include:

- Socialising and consulting on the options and potential reform programme, to allow a final shortlist and decision-making on priority reforms
- Further analysis and design work to enable a full business case to be developed for shortlisted and prioritised options
- Further engagement with Defra, Ofwat, market participants and service providers to fully understand impacts and opportunities
- Structuring and managing a programme of work to move from decisioning to implementation

1. **Business Case and Decisioning**

2. **Comms and Consultation**

3. **Options Architecture/ Design**

4. **Impact Assessment**

5. **Vendor Engagement / Procurement**

6. **Programme mobilisation and run**

7. **Implementation / Operational Change**

Prioritised options – for discussion

Martin Hall

The longlist – as per report

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		Option grouping (Priority order for detailed evaluation)	Options	Description
- Key drivers for the Strategic Metering Review - Most closely aligned to the immediate priorities.	1	**<u>Potential</u> must haves / 'no regrets' options**	a. **Option 9** Asset data improvement programme; and… b. **Option 4** Data platform	These are options that should be implemented and will provide a robust framework for developing metering in the market. They are also no-regrets options.
	2	**Performance improvement**	a. **Option 1** Wholesaler responsible for all market reads; or… b. **Option 2** Wholesaler reads in defined circumstances only	The best of these options could be selected, to tackle meter reading costs and long unread meters. Also to incentivise wholesalers to implement smart metering for NHH customers.
- Will become necessary if it is confirmed that accelerating smart metering in the NHH market is a critical driver	3	**Smart metering options**	a. **Option 6** Full NHH smart metering/technology rollout; or… b. **Option 7** Targeted smart(er) metering/technology rollout; or… c. **Option 10** Wholesaler smart(er) replacement service offering; or… d. **Option 11** Retailer/customer installation of additional technology	The best of these options could be selected, depending on individual wholesaler circumstances and building on the Enhancing Metering Technology work.
- Radical change: should only be considered if other options are not viable or successful	4	**Fall-back position**	a. **Option 5** Integrated / independent meter ownership and data service (as an option, only where wholesalers are not investing in technology)	A fall-back position if there is insufficient traction by wholesalers on smart metering deployment and data improvement in the NHH market.
- No clear case to progress at this stage, based on current evaluation	5	**Not prioritised for further evaluation**	a. **Option 3** Wholesaler reads and data service (for smart meters only) b. **Option 8** Retailer own and are responsible for assets c. **Option 12** Competition in metering Non-Primary Services	Option 3 combined with other options rather than being a separate option in its own right, on the basis that similar outcome would be delivered via a combination of wholesaler responsibility for reads (Options 1 or 2) and data platform (Option 4). Options 8 and 12 are currently viewed as unattractive due to delivery complexity and low likely benefits.

Higher

Priority for detailed evaluation

Lower

Longlist of options

#	Option	Description
1	**Wholesalers responsible for all market meter reads**	Wholesalers obliged to submit reads on behalf of market for all meter read types within own Wholesale Area
2	**Wholesaler Reads (Defined circumstances only)**	Meter read responsibility switches to wholesaler in defined circumstances only
3	**Wholesaler Reads and data service (for smart meters only)**	Meter read responsibility switches to wholesaler where smart metering is installed
4	**Data Platform**	New NHH market-wide data platform to improve access to and standardisation of data for market participants
5	**Integrated / independent meter ownership and data service**	New market structure with an independent meter asset provider and data platform as a service
6	**Full NHH Smart Metering/Technology Rollout**	Mandated and coordinated smart metering / smarter technologies roll-out programme for all of the NHH market
7	**Targeted Smart(er) Metering/Technology Rollout**	Mandate on wholesalers to deploy smart / enhanced metering technologies at a defined sub-set of premises only
8	**Retailers own and are responsible for metering assets**	Responsibility for metering assets transferred to incumbent retailer for all NHH SPIDs from a specified date
9	**Asset data improvement programme**	Centrally-governed programme of initiatives to improve known metering issues
10	**Wholesaler smart(er) replacement service offering**	Retailers can request Wholesaler to install smart meter / enhanced technology and provide access to data.
11	**Retailer/ Customer installation of additional metering technology**	Enhanced ability / rights for retailer/customer to install own smart equipment (or commission installation by qualified contractor)
12	**Competition in metering Non-Primary Services**	Opens up non-primary activities to competition as no longer wholesaler monopoly activity

Longlist – highest priority 1 & 2s

	#	Option
1	9	Asset data improvement programme
	4	Data platform
2	1	Wholesalers responsible for all market meter reads
	2	Wholesaler Reads (Defined circumstances only)
3	6	Full NHH Smart Metering/Technology Rollout
	7	Targeted Smart(er) Metering/Technology Rollout
	10	Wholesaler smart(er) replacement service offering
	11	Retailer/ Customer installation of additional metering technology
4	5	Integrated / independent meter ownership and data service
5	3	Wholesaler Reads and data service (for smart meters only)
	8	Retailers own and are responsible for metering assets
	12	Competition in metering Non-Primary Services

- Key drivers for the Strategic Metering Review
- Most closely aligned to the immediate priorities.

Longlist – priority 3s: smart metering-dependent

	#	Option
1	9	**Asset data improvement programme**
	4	**Data platform**
2	1	**Wholesalers responsible for all market meter reads**
	2	**Wholesaler Reads (Defined circumstances only)**
3	6	**Full NHH Smart Metering/Technology Rollout**
	7	**Targeted Smart(er) Metering/Technology Rollout**
	10	**Wholesaler smart(er) replacement service offering**
	11	**Retailer/ Customer installation of additional metering technology**
4	5	**Integrated / independent meter ownership and data service**
5	3	**Wholesaler Reads and data service (for smart meters only)**
	8	**Retailers own and are responsible for metering assets**
	12	**Competition in metering Non-Primary Services**

Will become necessary if it is confirmed that accelerating smart metering in NHH market is a key driver (see Enhanced Metering Technology outputs)

Longlist – priority 4s

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	#	Option
1	9	**Asset data improvement programme**
	4	**Data platform**
2	1	**Wholesalers responsible for all market meter reads**
	2	**Wholesaler Reads (Defined circumstances only)**
3	6	**Full NHH Smart Metering/Technology Rollout**
	7	**Targeted Smart(er) Metering/Technology Rollout**
	10	**Wholesaler smart(er) replacement service offering**
	11	**Retailer/ Customer installation of additional metering technology**
4	5	**Integrated / independent meter ownership and data service**
5	3	**Wholesaler Reads and data service (for smart meters only)**
	8	**Retailers own and are responsible for metering assets**
	12	**Competition in metering Non-Primary Services**

Consider if other options are not viable or successful

Longlist – lowest priority 5s

	#	Option
1	9	Asset data improvement programme
	4	Data platform
2	1	Wholesalers responsible for all market meter reads
	2	Wholesaler Reads (Defined circumstances only)
3	6	Full NHH Smart Metering/Technology Rollout
	7	Targeted Smart(er) Metering/Technology Rollout
	10	Wholesaler smart(er) replacement service offering
	11	Retailer/ Customer installation of additional metering technology
4	5	Integrated / independent meter ownership and data service
5	3	Wholesaler Reads and data service (for smart meters only)
	8	Retailers own and are responsible for metering assets
	12	Competition in metering Non-Primary Services

No clear case to progress at this stage (based on current evaluation)

Discussion (20 mins)

Initial views on priorities

Any we have **missed**?

Any that **should not** go forward?

Any that could be **fast-tracked** for PR24?

Discussion

	#	Option
1	9	Asset data improvement programme
	4	Data platform
2	1	Wholesalers responsible for all market meter reads
	2	Wholesaler Reads (Defined circumstances only)
3	6	Full NHH Smart Metering/Technology Rollout
	7	Targeted Smart(er) Metering/Technology Rollout
	10	Wholesaler smart(er) replacement service offering
	11	Retailer/ Customer installation of additional metering technology
4	5	Integrated / independent meter ownership and data service
5	3	Wholesaler Reads and data service (for smart meters only)
	8	Retailers own and are responsible for metering assets
	12	Competition in metering Non-Primary Services

Initial views?

Missed?

Drop?

Fast-track?

Next steps

MOSL
MARKET OPERATOR SERVICES LTD

- Available at **mosl.co.uk**:
  - Research paper
  - Feedback form
  - Slides and recording
- Please:
  - Return form to **comms@mosl.co.uk** by Friday 22 July
  - Email us if you didn't RSVP
- We will:
  - Share your feedback with the Metering Committee & Strategic Panel
  - Provide feedback on responses

Phase 2 of Roles and Responsibilities to include:

1.
Business Case and Decisioning

2.
Comms and Consultation

3.
Options Architecture/ Design

4.
Impact Assessment

5.
Vendor Engagement / Procurement

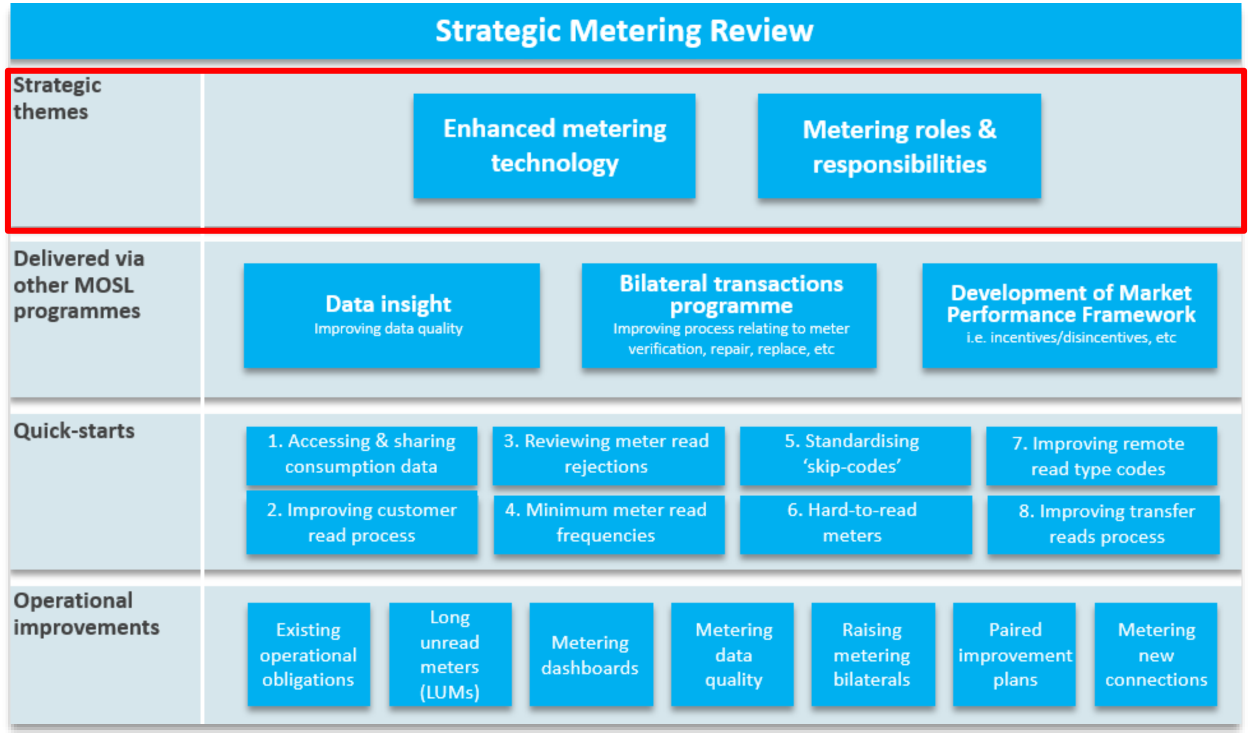
6.
Programme mobilisation and run

7.
Implementation / Operational Change


THANK
YOU!

The Strategic Metering Review

- Five years on from the opening of the market – and PR24 around the corner
- Ongoing concerns about the accuracy and timeliness of consumption data
- Metering at the heart of the new Strategic Panel's priorities: value creation, customer service excellence, water efficiency
- Metering Committee and MOSL working through range of operational improvements
- And exploring two strategic themes:
  - Enhanced metering technology (April)
  - Roles and responsibilities (today)



Strategic Metering Review

Strategic themes
- Enhanced metering technology
- Metering roles & responsibilities

Delivered via other MOSL programmes
- **Data insight** Improving data quality
- **Bilateral transactions programme** Improving process relating to meter verification, repair, replace, etc
- **Development of Market Performance Framework** i.e. incentives/disincentives, etc

Quick-starts
- 1. Accessing & sharing consumption data
- 2. Improving customer read process
- 3. Reviewing meter read rejections
- 4. Minimum meter read frequencies
- 5. Standardising 'skip-codes'
- 6. Hard-to-read meters
- 7. Improving remote read type codes
- 8. Improving transfer reads process

Operational improvements
- Existing operational obligations
- Long unread meters (LUMs)
- Metering dashboards
- Metering data quality
- Raising metering bilaterals
- Paired improvement plans
- Metering new connections