MOORHOUSE

M GROUP



Smart: Learning from energy, leading in water

How energy's lessons can help water make decisions on using data well, earning customer trust, managing cost risks, and delivering resilient services with lasting value in AMP8 and beyond.

With contributions from M Group and the Water Smart Metering Executive Forum

Moorhouse Consulting | November 2026

Introduction: Water has the chance to learn before it scales

Eight decisions to turn smart metering investment into reliable service and lasting value.

Smart meters enable value; how they are used delivers it

Water is entering a defining period. Ofwat describes PR24 as a quadrupling of new investment over 2025-30, while approximately 10 million smart meters are expected to take coverage to around half of households and businesses by 2030. This is an investment in a continuing service, not simply new meters.[1] [3]

Smart is more than a delivery challenge. Done well, the infrastructure can support leakage reduction, demand management, fairer service, stronger asset intelligence and greater resilience. Done narrowly, it could leave the sector with millions of new assets, fragmented data and too little demonstrable value.

Energy's experience shows that installation is only the first step. Value depends on connectivity, trusted and interoperable data, customer confidence, lifecycle planning and clear ownership of benefits.

The Water Smart Metering Executive Forum: Learning from energy's experience

This paper combines Moorhouse Consulting and M Group's experience of energy's smart rollout with insights from the Water Smart Metering Executive Forum, held on 24 September 2026 (the 'Water Executive Forum'). Senior water leaders across strategy, customer, delivery and data joined consumer, regulatory, and energy-sector perspectives to explore the key lessons from energy, and where water's own model offers an advantage.[6]

Energy demonstrated what smart infrastructure can enable; from accurate billing and innovative tariffs to improved system management, flexibility and customer behavioural change. It also demonstrated the cost of allowing installation volumes to run ahead of the capabilities needed to turn data into action. Water can learn from energy without reproducing its delivery model. It can use energy's experience to test assumptions, identify the priority desired outcomes, and tackle the difficult choices earlier, before volume, contracts and technology make them harder to reverse.

Eight decisions for smart water

The eight decisions explored later in this paper translate energy's lessons into practical choices for water companies, regulators, and consumer groups. Those involved in designing, governing, scaling, and delivering water services can use them to help shape thinking on key aspects of smart programme delivery and benefits realisation. The challenge for water leaders is to deliver AMP8 commitments while building a smart service that remains effective and affordable beyond the current investment period and delivers demonstrable outcomes for customers. The sections that follow discuss what energy achieved, the lessons water can apply, and our eight practical decisions:

1. Understand the estate and tackle difficult properties early.
2. Plan capacity around the work on the ground.
3. Measure a working service over its full life.
4. Agree how data will be used and shared.
5. Earn trust by making the customer proposition credible for households and businesses.
6. Agree how metering powers will be used, and earn customer buy-in.
7. Plan beyond AMP8: manage transition costs and future renewal.
8. Put benefits in the hands of operational owners.

Smart metering isn't just about meters. Energy's lessons are water's advantage.

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SECTION 1

What energy achieved and what it left unfinished

A national achievement with a difficult tail

Over roughly 15 years, energy built smart infrastructure at national scale. By June 2026, Great Britain had 42 million smart and advanced meters in homes and small businesses, covering 72% of supply points. Of the 40 million classified as smart, 92% were operating in smart mode. In Q2 2026, large suppliers installed 1.095 million smart and advanced meters of which 525,000 were new installations and 570,000 were replacements.[2] Those figures also point to the next phase of the job: scale creates new capability, while every smart asset brings an ongoing service and renewal commitment.

WATER EXECUTIVE FORUM VOICE

> ***"Treat the final 10% as a programme in its own right.***

AREA	WHAT ENERGY SHOWS	THE IMPLICATION FOR WATER
Scale	15 years; 42m smart and advanced meters; 72% of meters in homes and small businesses across Great Britain.	Energy created a national platform for network flexibility and new customer offerings. Water should plan for both deployment and the capabilities needed to use that platform.
Working service	92% of smart meters operating in smart mode.	Commissioning is only the start; service health must remain visible for as long as the meter is in use.
Completion tail	The remaining population contains more refusals, access issues and technically difficult sites.	Early productivity gives a weak guide to the cost of finishing the programme.
Lifecycle	570,000 of 1.095m installations in Q2 2026 were replacements; replacements were 52% of large suppliers' domestic and smaller non-domestic activity.	Renewal and communications compatibility become a major workload while first-time deployment is still under way.[2]
Value	Accurate bills, smart tariffs and system balancing became possible.	Benefits appear when operating teams, customer propositions and customers themselves make practical use of the infrastructure.

Energy achieved broad coverage, common communications and a platform for new services. Its main challenges involved customer trust, asset records, communications, dispersed delivery and hardware replacement before rollout was complete. Water has the opportunity to design for these dependencies earlier. The evidence for water is that maximising first-year installations may simply defer cost and complexity to later years. Centring strategy around outcomes and benefits with clear business owners early-on is key to being able to win customer trust and adapt as programmes and tech evolve.[6]

SECTION 2

Learn from energy without copying it

Take the lessons; shape the model for water

Define desired outcomes early, then organise delivery and benefits ownership around them. Plan now for the constraints energy encountered, while using water's regional delivery model and closer alignment of customer, network and operational responsibilities to its advantage. The following transferable lessons inform the eight decisions in Section 3.

WATER EXECUTIVE FORUM VOICE

"The winners won't be the fastest installers. They'll be the earliest decision makers."

LESSONS WATER CAN USE

Track a working service as well as completed installations.

Expose the difficult tail early and cost it separately.

Build customer trust through every part of the service journey.

Agree portable data definitions and supplier-exit requirements before scale.

Fund device health, obsolescence, remediation and replacement from the outset.

Put each benefit with an operational owner who has a baseline and the authority to act.

Build the business case around customer, operational, financial and environmental benefits from the outset, not installation savings alone.[6]

WHAT WATER MUST SHAPE FOR ITSELF

Design communications, governance and technology around water's own needs.

Use regional sequencing instead of recreating a dispersed supplier-led rollout.

Build a water-specific customer promise around its benefits, bill impacts and behaviours.

Design separately for households, small businesses and major non-household users.

Design asset and data architecture for its full life, beyond a five-year asset management plan (AMP) period.

Base installation rates on water job types, access conditions and civil engineering requirements, such as excavation and reinstatement ('civils').

The priority is to make choices now that protect outcomes later. Test how sequencing, data requirements, customer engagement and lifecycle commitments could enable or constrain delivery. Use that evidence to focus programmes of work and manage benefits realisation, rather than treating installation volumes alone as success.[6]

SECTION 3

Eight decisions that will shape smart water

Water's regional model offers advantages in delivery, customer engagement and benefits ownership, but rollout choices will still involve trade-offs. Prioritising low-cost boundary-box exchanges can accelerate volume while leaving higher-impact properties behind; richer data requires capacity to act on it; benefit owners need the funding and empowerment to act. Geography, population density and operational constraints will shape the right approach for each water company. The four foundational questions below help leaders test assumptions and choices, and the eight decisions that follow delve into the detail of how the lessons from energy can be applied.



Which choices in your programme could become tomorrow's costly constraints? Which could unlock lasting value and justify investment? Which uncertainties could change the plan? Identifying which activities and which sequence deliver a reliable service and demonstrable benefits is paramount in managing an affordable whole-life cost. Each decision below identifies a choice to make, the evidence to request and the consequence of postponing it.

1. Understand the estate and tackle difficult properties early

Use each installation visit to verify and improve records.

Energy often discovered an asset's true condition only when an engineer reached the property. Water faces a similar risk through uncertain records, buried assets, shared supplies, chamber condition, access, civils and connectivity. Its regional model offers a practical advantage: work can be sequenced street by street, district by district or catchment by catchment. Crews can improve records while they are on site, and planners can see exceptions before they pile up. The choice is how much uncertainty to resolve before committing crews, materials, and customer appointments.

PLAN FOR THE WORK YOU WILL FIND

- Standard exchange with proven access and connectivity.
- Appointment-led or internal work requiring customer support.
- Excavation, shared supply, high-rise or non-standard configuration.
- Vacant, vulnerable, disputed or difficult-to-read locations.

BUILD A RELIABLE VIEW OF THE ESTATE

- Asset and location confidence, including images.
- Expected job type, skills, time, materials and permits.
- Likely signal performance and commissioning route.
- Structured abort codes and evidence returned to planning.

WATER EXECUTIVE FORUM VOICE

"Don't lose that opportunity that water companies have for geographic based rollout, local engagement and getting your messages across in a much more targeted way.

An early rush through easy properties can leave manual reads scattered, weaken route density and prolong the cost of running two estates. Geographic rollout can protect density, but unresolved properties within an otherwise converted area can still leave inefficient residual routes. Including technically difficult or hard-to-access properties in each wave exposes constraints while there is still time to adapt, spreads remediation demand and tests specialist capacity before the tail becomes the whole programme. Geographic sequencing can also support targeted engagement with councils, housing providers and community groups.[6]

Targeted pre-installation surveys can reduce failed visits and later costs.

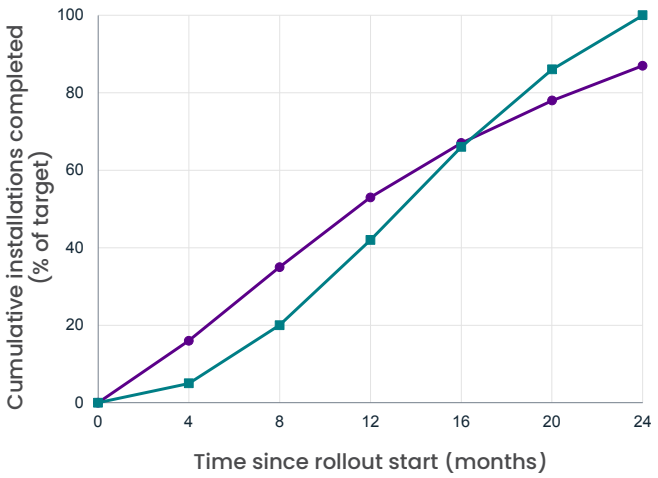
M Group's energy rollout experience showed that targeted surveys could slow initial installation rates but reduce aborted visits, improving overall completion times by up to 15% compared with direct installation without a survey.[6]

Companies should target surveys where uncertainty about assets, access or communications is likely to cause failed visits or remedial work; install directly where those conditions are well understood. Better information can reduce repeat visits and whole-life costs, while a successful first visit can build customer trust.[6] Water's geographic ownership provides an advantage that energy's supplier-led model did not have.



The practical test is whether the expected reduction in failed visits and remedial work justifies the information cost. Delivery and asset teams should agree the survey triggers together, then review them against actual outcomes. The objective is a lower cost to complete the service, not a higher survey rate.

Comparison of overall completion times based on survey first or direct install



Install first

Aborted visits: HIGH

Shows early progress but prolongs the tail.

Survey first

Aborted visits: LOW

Starts slower. Fewer aborts. Finishes stronger.

WATER EXECUTIVE FORUM VOICE

"Spend the next pound of information where it avoids more than a pound of delivery failure.

2. Plan capacity around the work on the ground

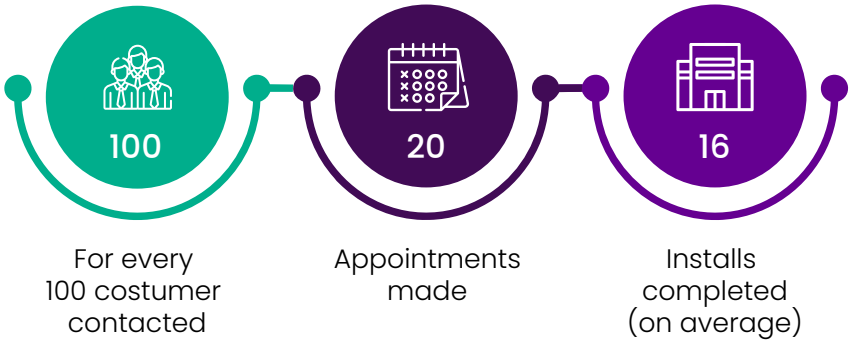
Use completed and failed visits to improve forecasts.

One energy delivery example shared at the Water Executive Forum assumed ten dual-fuel meter exchanges per engineer per day; the median achieved was around four.[6] The lesson for water is the gap between assumption and reality, not the installation rate itself. A standard external exchange, an internal appointment, a civils-led job and a specialist remedial visit require different time, skills and costs. Overestimated installation rates create early capacity shortfalls and undermine confidence in the programme. Base forecasts on observed job times, geography, access conditions and customer needs.

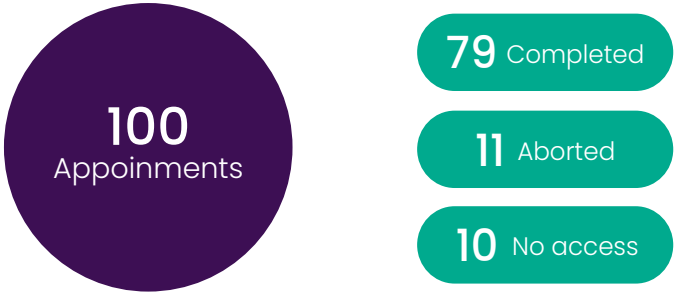
Include travel, aborted visits, reinstatement, job durations and repeat visits in productivity assumptions. Plan training, supervision, quality assurance and customer support alongside installer capacity. Reserve resources for connectivity repairs, device maintenance and complaint resolution, so the forecast reflects the cost of a working service rather than the installation visit alone.

Record outcomes and failure reasons for every visit, then use them to update workforce, materials and specialist-capacity forecasts for later waves. Optimistic productivity assumptions can trigger capacity shortfalls and premium rates; poorly matched commitments can leave paid capacity idle. Reforecast delivery partners, materials and specialist work together, so commitments reflect the changing work mix.

Energy's late-stage appointment journey



Per 100 Appoinments



Energy Delivery Example

10 Installs per day
Per engineer assumed;
around 4
achived.

Water excutive forum discussion

5-60 installs

per engineer per day

Water installation rates vary massively depending on geographic factors, meter locations and building types.

Capacity: six connected planning decisions

Forecast by job type

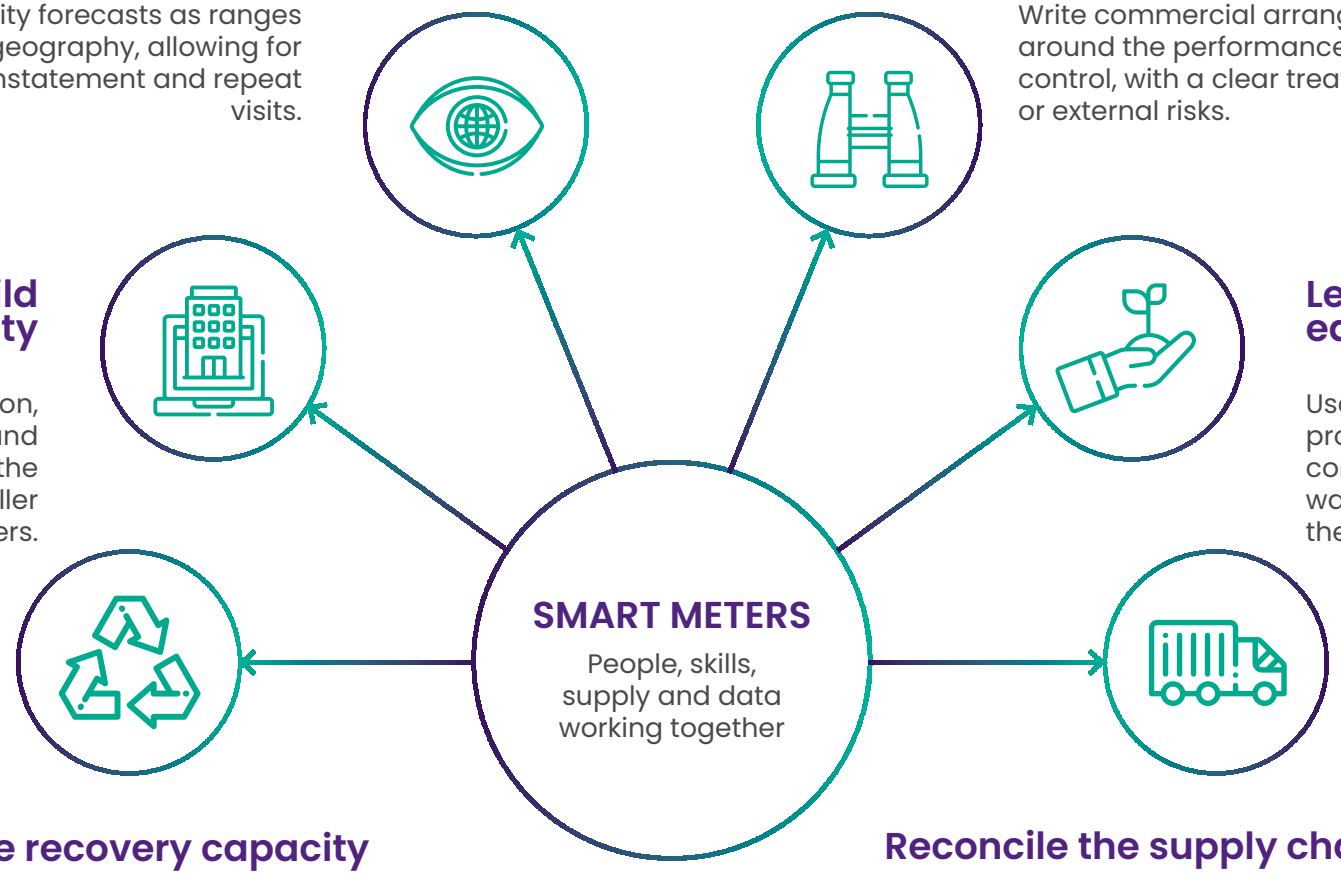
Build productivity forecasts as ranges by job type and geography, allowing for travel, aborts, reinstatement and repeat visits.

Allocate commercial risk

Write commercial arrangements around the performance each party can control, with a clear treatment of shared or external risks.

Build capability

Plan training, supervision, quality assurance and specialist capacity at the same time as installer numbers.



Learn from each wave

Use actual reason codes, productivity and first-time completion to reshape later waves and update the forecast.

Reserve recovery capacity

Keep capacity for connectivity recovery, device health and customer remediation after the installation teams move on.

Reconcile the supply chain as a whole

Reconcile your supplier commitments with the realistic work mix. Overstated productivity can leave too little skilled capacity and trigger premium rates, rebooking and additional supervision; understated demand can leave paid capacity idle. Reforecast crews, materials and specialist support together, not as separate budgets.

3. Measure a working service over its full life

A meter can be installed safely, record accurately and still fail to provide a smart service. Energy's renewal workload began before rollout ended: in Q2 2026, large suppliers replaced more domestic smart meters than they installed for the first time, including end-of-life and communications-compatibility work.[2] Installation is not complete service delivery: the meter must communicate reliably, its data must be usable, and relevant teams must act on it to realise the business case.

Service milestones and what good looks like



INSTALLED
The correct asset is fitted safely, recorded fully and commissioned successfully.

CONNECTED
Reads and events arrive at the required frequency, latency and persistence.

TRUSTED
The data is plausible, traceable, secure and linked to reliable master data.

USED
Priority customer and operational journeys can access it.

ACTIONED
An alert or insight has an owner, response time and route to closure.

RENEWED
Battery, firmware, communications, security and device replacement work is forecast and funded.

BENEFITS DEMONSTRATED
Customer, operational, financial and environmental outcomes are measured against baselines.

Procurement and service plans need to cover batteries, firmware, cyber support, communications change, spares, warranties, data portability, disposal and the capacity to intervene. Whole-life cost includes every later visit as well as the installation itself. A low initial installation price can conceal an expensive service.

WATER EXECUTIVE FORUM VOICE

> **"If a smart meter isn't communicating, it's just an analogue meter and installing it risks becoming a sunk cost.**

4. Agree how data will be used and shared

Energy's experience highlights the need to distinguish shared data requirements from company-level delivery choices. The Water Executive Forum agreed on the potential value of data interoperability between water companies. A regulator-led process could establish common requirements for identifiers, data quality, access, security, lawful sharing, retention and portability, with consumer representation and a route for updating standards. Companies would retain choices over communications, workflows and analytics.[6]

WATER EXECUTIVE FORUM VOICE

> **It is so much easier to spend time having a data standardisation conversation now before everybody has rolled it out completely and you've got to retrofit everything later.**

Companies can act now: document data definitions, test portable exports and include supplier-exit requirements in contracts. A shared file format alone is not interoperability: identifiers, units, timestamps, quality flags and permissions must mean the same thing. These are practical design considerations, not a prescribed sector standard. A leak signal still needs context, a responsible team, customer communication and a route to closure. Keep definitions consistent over time so evidence from successive delivery waves and investment periods can be compared, even when service providers, systems or Price Reviews change.



PROPOSED COMMON DATA REQUIREMENTS

- Core asset and premises identifiers.
- Event, interval and quality definitions.
- Security, access, consent and retention rules.
- Portability, interface and supplier-exit requirements.
- Comparable service and outcome measures.



COMPANY-LEVEL CHOICES

- Communications mix by geography and asset environment.
- Company operating workflows and case management.
- Analytics models and prioritisation rules.
- Customer propositions and channel design.
- Innovation above the common foundation.

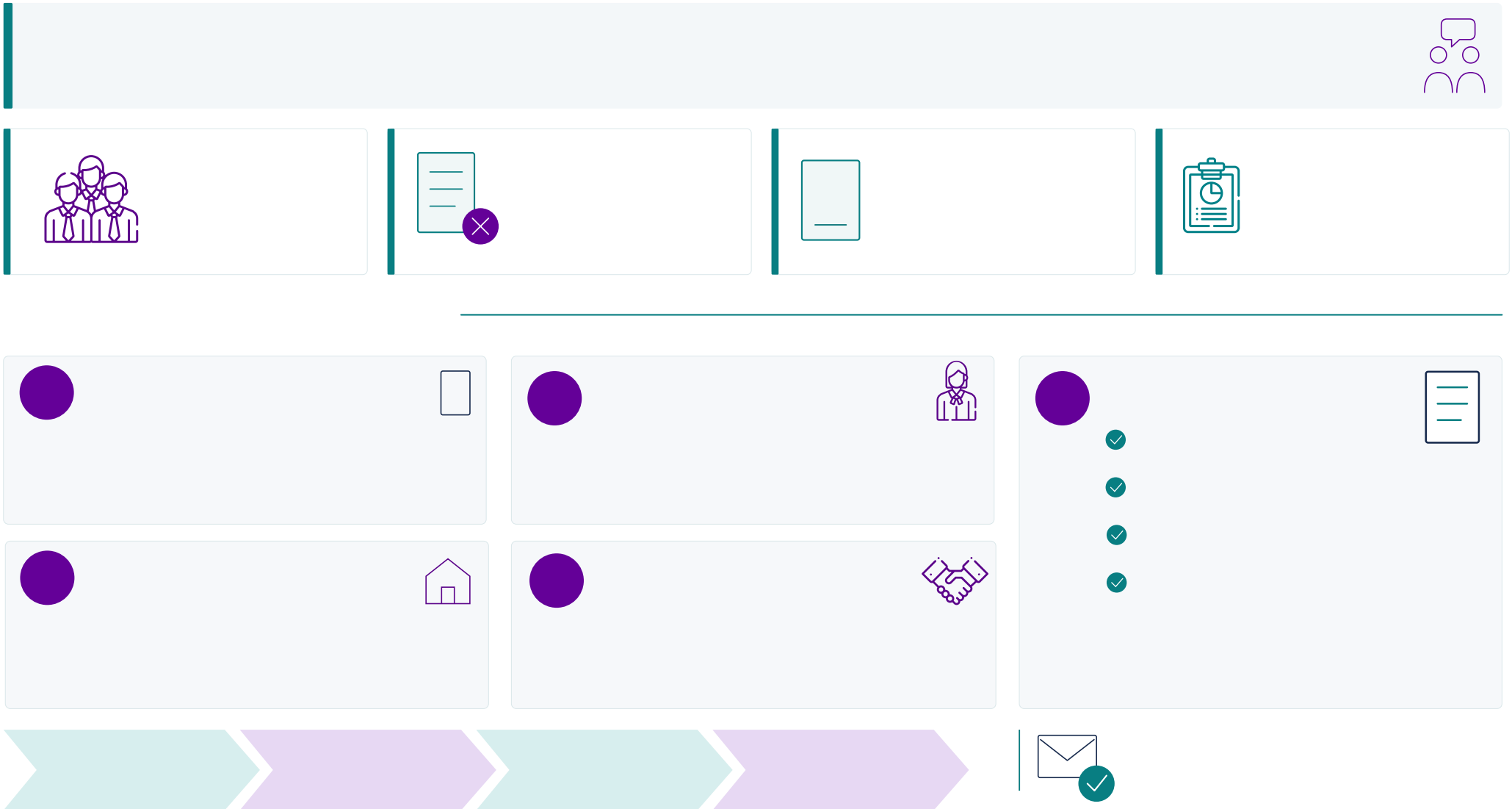
5. Earn trust by making the customer proposition credible for households and businesses

Build engagement into the whole service journey

Customer engagement is not simply a communications campaign before installation. It is a service strategy spanning the first notice, the installation experience and the support that follows. Companies need to explain what smart metering will mean for different customers, make benefits tangible and demonstrate that problems will be resolved. Understanding different customer personas enables targeted messaging and persuasion; no single benefit will convince everyone. Success depends not only on getting a meter installed, but on customers understanding the service and being able to act on the information it provides.

Qualitative household research from the Consumer Council for Water (CCW) highlights the need for relevant, positively framed information, proactive prompts and support for customers who may not save money.[5] Make post-installation benefits specific: leak alerts, clearer bills, practical support and local resilience information.

CCW's research shows support is real, but fragile



Protect customers' first contact and initial experiences of smart through clear notices, realistic appointments and visible recovery of problems. Focus experienced staff on maintaining customer engagement and ensure field staff, customer service advisers and complaints handlers are able to explain privacy, data use, supply-pipe responsibilities and potential bill impacts plainly.

Work with local authorities, housing providers and trusted community groups to explain the rollout and support geographically coordinated installation waves. Tailor engagement to different customer needs and expectations rather than assuming one message will secure consent. Keep telephone, face-to-face and non-digital routes available.[4] [6]

WATER EXECUTIVE FORUM VOICE

> **If you've lost trust or if you've got a trust issue, then you need to address that first before you can expect to obtain customer consent and buy-in.**

Give non-household customers a distinct service model

Non-household customers need their own proposition and operating arrangements. The Department for Environment, Food and Rural Affairs (Defra) reports that they account for around 20% of demand, while the top 1% of users account for about half of that use.[1] The messaging and approach for non-household customers must reflect how the organisation uses water, who receives the data, who pays the bill and who has authority to act. A large industrial user, a multi-site organisation, a landlord, vacant premises and a small business will draw value from the data in very different ways and need different interventions.

Responsibilities must also work across the wholesaler–retailer–customer chain. Define who receives and explains high-use or continuous-flow alerts, who investigates meter-health problems and who closes the resulting action. Small businesses deserve particular attention: they may have neither the analytical capability of major users to turn consumption data into practical decisions nor the collective voice associated with households.

WATER EXECUTIVE FORUM VOICE

> **Small business often felt like it slipped through because they didn't necessarily have the voice of some of the big businesses.**

6. Agree how metering powers will be used, and earn customer buy-in

Use water's different starting position without treating trust as optional

Around 60% of attendees at the Water Executive Forum identified low customer trust and the decision not to mandate smart metering as the key factors that most constrained energy's rollout.[6] Supplier-led installation targets depended on securing customer consent; refusals and repeated appointment attempts complicated delivery as willing customers were progressively reached. Whether mandating would have made things easier remains uncertain: it would not have removed technical barriers, workforce constraints or service failures, and could have intensified resistance.

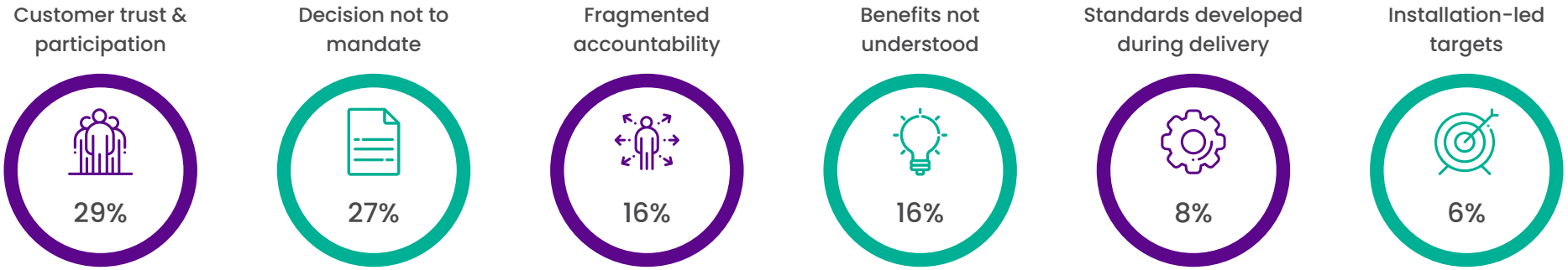
Water starts from a different position. In England, companies can introduce compulsory metered charging in areas designated as seriously water stressed where premises are covered by a metering programme specified in their published water resources management plan.[7] Recent droughts[8], the prospect of hotter weather and growing long-term pressure on water sources strengthen the case for explaining why better measurement matters. Existing powers can support compulsory metering in applicable circumstances, but do not amount to a blanket smart meter mandate.

A practical dialogue between water companies and regulators is needed to clarify how existing powers will be used within the legal framework, how customers will be informed and what safeguards will accompany delivery. Legal authority must still be accompanied by a concerted effort to secure informed buy-in, willing cooperation and consent where applicable. Explain clearly what is required and what remains a choice.

Customers want results. Whether metered charging is compulsory or not, identify customers at risk of unaffordable increases and put affordability and accessibility support in place before charging changes.

WATER EXECUTIVE FORUM VIEW:

Which factors most constrained the smart energy rollout?



7. Plan beyond AMP8: manage transition costs and future renewal

Energy's replacement workload demonstrates that replacements and first-time installs overlap and must be planned together. Water faces a further transition challenge: as the legacy estate shrinks, its unit costs can rise.Manual routes lose density, fixed systems and contracts remain, specialists travel farther and exceptions take up more of the work. At the same time, smart metering creates new costs for communications, data operations, device health and remediation. The combined cost may rise before it begins to fall. For water, the practical lesson is to treat AMP8 as one stage in the life of the smart estate, not the boundary of its business case. Modelling when legacy costs can genuinely be removed, what it takes to sustain the new service, and when devices or communications may need renewal will be essential in accurately forecasting costs and the allowances required across multiple Price Review periods.

AS THE ESTATE CHANGES

- Smart and advanced metering infrastructure (AMI) assets grow rapidly.
- Traditional and automated meter reading (AMR) populations fragment by geography and condition.
- Device-health, battery, security and data-remediation work grows.
- Customer and field journeys become more differentiated.

WHAT HAPPENS TO COST

- Manual route productivity falls.
- Parallel systems, skills and contracts persist.
- Stranded cost and supplier dependencies become visible.
- Retirement timing determines whether benefits reach the P&L.

WATER EXECUTIVE FORUM VOICE

“Somebody should be thinking AMP10 and working backwards.”

Set evidence-based triggers for consolidating routes, systems, contracts and skills; lower legacy volumes alone may not mean reductions in fixed costs. Legacy costs can be retired in stages by route, system or contract where service obligations allow; company-wide 100% smart coverage is not necessarily required before a cost can be removed. Manage the portfolio of services with a transition P&L, not as separate “rollout” and “business-as-usual” worlds. That view brings smart-service costs, rising legacy unit costs, avoided expenditure and realised benefits together.[6] Use delivery evidence to inform future investment cases and compare sequencing options on when expenditure can actually be removed. Distinguish benefits already delivered from those that depend on further investment or operational change. This gives leaders a clearer basis for planning realistic opex and capex costs which support decisions across Price Review periods, rather than absorbing unexpected cost into operational expenditure over time and making today’s savings tomorrow’s unfunded intervention.

8. Put benefits in the hands of operational owners

Installation targets still matter. They create pace and make a large programme visible. But the measure that dominates reporting dashboards will shape day-to-day choices. Volume-led reporting favours easy sites and can push connectivity, customer recovery and complex cases to the back of the queue. Accountability therefore needs to follow the whole chain, from a working meter to usable data or a completed intervention. Agree priority outcomes with the business teams responsible for delivering them, then select measures that demonstrate progress.

Who turns meter data into value?



Demand and leakage

Owner: Water resources / network operations

Consumption, continuous-flow and network evidence drives a completed intervention.



Field productivity

Owner: Operations

Better diagnosis, planning and records reduce avoidable visits and improve first-time completion.



Resource planning

Owner: Strategy / asset planning

Granular demand evidence changes forecasts and investment choices.



Lifecycle value

Owner: Asset / technology owner

Device health, replacement and legacy retirement are funded and optimised together.



Revenue assurance

Owner: Commercial / finance

Exceptions are identified, investigated and resolved with controlled customer treatment.



Customer and affordability

Owner: Customer operations

Bills, alerts and support journeys improve outcomes without creating avoidable harm.

A programme office can coordinate and assure the work, but each benefit belongs with the operational team able to create it. The business case needs to cover customer, operational, financial and environmental value from the beginning, alongside the cost of data operations, intervention and renewal. Separate committed benefits from future opportunities; make dependencies and timing visible, and avoid counting the same saving twice. For each committed benefit, specify a baseline, a measure, an accountable operational owner and the capacity to intervene.

Finance can validate the case; operations must own the action; all must agree on the 'north star' and key measures which demonstrate the desired outcomes have been achieved.[6] Carry these baselines, responsibilities and measured results into future investment cases, making clear what has been achieved, what remains forecast and where further investment is needed. Early agreement of benefits ownership and clarity on success measures provides the best foundation for gathering the operational, customer, and asset data to prove tangible benefits and strengthen or course correct current and future business cases.



Illustrative application: when a leak alert becomes a benefit

A continuous-flow signal reaches the data platform. The data team checks its quality; the responsible customer or operational team assesses it, contacts the customer where appropriate and arranges the next action. For a business customer, the wholesaler, retailer and customer need an agreed hand-off. The case closes only when the outcome is recorded not when the alert is sent.

The benefit owner then tests whether consumption fell, whether the change persisted and what the intervention cost. The same chain exposes the trade-off: increasing alert sensitivity without response capacity may create a larger queue rather than more water savings. This is an illustrative service design, not a reported case study or a prescribed allocation of market responsibilities.

Regulators and consumer bodies should be able to see both aggregate progress and how costs, benefits and service failures fall across customer groups. Comparable definitions can support scrutiny without imposing identical delivery models across all water companies. Reporting should make poor experiences visible even when the overall installation programme is on track.



A useful dashboard: three different tests of progress

Installation volumes are important, but do not demonstrate value. Use three tests of progress: installations completed, service working and benefits demonstrated. Track pace and first-time completion; sustained communications, data quality and intervention closure; then customer experience, measured benefits and legacy retirement. Keep forecast value separate from realised value, and show how lessons change later delivery waves.[6]

AN EXECUTIVE REFLECTION

Would the programme still look 'green' if installation volumes were removed from the dashboard?

An example dashboard: illustrative outcomes-focused reporting

DELIVERY COMPLETED

124,800
Meters installed

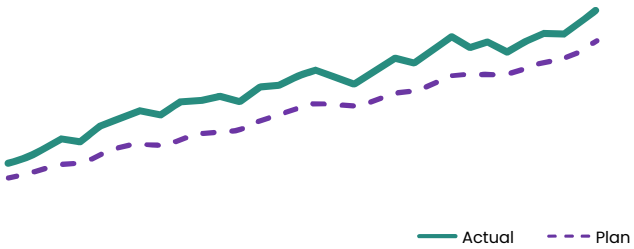
96%
Plan achieved

91%
First-time completion

7%
Abort rate

18 days
Complex-case backlog

Weekly installations



Next wave: Target access checks at high-abort sites

SERVICE WORKING

97.2%
Sustained communications

98.5%
Data quality pass rate

89%
Notifications within SLA

1,240
Open service exceptions

3 days
Median time to resolve

Exception ageing



Next wave: Reserve connectivity recovery capacity

BENEFITS EVIDENCED

£1.8m
Realised value

£2.6m
Forecast value

4.6ML/day
Verified leakage reduction

84%
Customer satisfaction

12
Legacy routes retired

92%
Benefits with signed-off evidence

Benefits by outcome



Learning into action	Access checks - fewer aborts	Connectivity recovery - service restored	Route consolidation - cost released

SECTION 4

Decisions at each stage

Use evidence that matches where the rollout is today

Each water company starts from a different place. Some are still shaping architecture and procurement; others are piloting, scaling or already running a mixed estate. The stages below provide practical, repeatable checks applicable to any stage of the smart rollout journey. A programme already at scale can use them to find gaps without pausing work that is performing well; a programme in its early stages can use them to help whole-life service considerations; both can use them when considering future renewals, exchanges and technology evolution.



WATER EXECUTIVE FORUM VOICE

"Collecting the data is the easy part. How are you going to use it to your advantage?

Evidence required at each rollout stage

Design the service

Before the major commitments are made



Name the priority outcomes and their owners; segment the estate; agree minimum data and service requirements; model lifecycle and mixed-estate cost; test supplier exit and obsolescence provisions.

Ready to move on when: The programme can explain what creates value, which choices will be hard to reverse and how failure will be spotted.

Test in the field

Pilots or early waves



Test a representative mix-difficult properties, urban and rural conditions, vulnerable customers and non-household journeys. Measure sustained reads and completed actions as well as installations.

Ready to move on when: Evidence supports the operating assumptions beyond the easiest locations.

Scale what works

Volume deployment



Use productivity evidence by job type, customer and service measures, controlled exception routes and rapid feedback. Keep lifecycle work, replacement and legacy retirement in the same plan.

Ready to move on when: Expansion is backed by repeatable service performance and funded exception handling.

Turn data into action

As data begins to flow



Build alerts and insight into operational and customer journeys; validate the benefits; refine the proposition; retire duplicate processes and systems when the evidence supports it.

Ready to move on when: Business teams can measure the benefits, plan interventions, and evidence value.

Run and renew

Mature estate



Manage device health, batteries, firmware, cyber, communications change and replacement cohorts. Re-procure while protecting data continuity and customer service.

Ready to move on when: Renewal demand, workforce and funding are forecast before asset or communications failure creates a new tail.

Practical checks to keep live throughout the rollout

Keep five checks active across every stage. Escalate an exception when it changes the next decision; a completed review is not evidence that the underlying risk is controlled.

- **Estate:** are records improving, and is the difficult tail being resolved rather than deferred?
- **Capacity:** do observed job times, aborts and remediation demand support the next wave?
- **Service:** are communications, data and fault resolution meeting agreed acceptance tests?
- **Customers:** can households and businesses understand the service, obtain help and resolve problems?
- **Value:** are funded owners demonstrating benefits and removing legacy costs when evidence supports it?

SECTION 5

Conclusion

Use energy's hard-won lessons while the choices are still open

Energy's rollout proved smart infrastructure can support accurate billing, new customer propositions and better system management. It also exposed the difficult tail, the fragility of trust, the gap between an installed meter and a communicating one, the cost of fragmented data choices and a replacement workload that arrives before deployment is complete.

Water can use regional control to coordinate field delivery, work with trusted local organisations and retire or reduce the legacy estate deliberately. Those advantages will count only if customer, delivery, data, finance and commercial teams make decisions together, and remain accountable for the service and continuing benefits delivery after the installation programme moves on.

The test of success is a reliable meter producing usable data, supported by an effective data service, and followed by action that delivers measurable customer, operational, and environmental value. Which decision would change in your programme if sustained service and demonstrated benefits carried the same weight as installation volume?



WATER EXECUTIVE FORUM VOICE

> ***Because if all we've done is replace one meter with another, the business case is pretty boring. The real value has always come from what's possible once you have access to this better, more granular version of data.***

Whether the programme is being designed or is already at scale, the aim is the same: expose costly assumptions while they can still be changed, know your end-game in terms of desired outcomes, and ensure the business is equipped to deliver the value it has promised.

Use the following eight questions, one for each decision, with delivery, customer, strategy, data, finance and commercial teams. For each, identify the evidence, the accountable owner and the next decision required.

Eight decisions: questions for your next team review

01 Estate and sequencing.

Do we understand our estate and test diffcult properties early, rather than leave a costly tail?

02 Realistic capacity.

Does our plan reflect actual job times, failed visits and the skills and support needed for each delivery wave?

03 A working service.

Do acceptance tests and partner incentives secure reliable communications, usable data and clear fault ownership?

04 Data use and portability.

Can teams act on reliable data and move it between providers without losing meaning or control?

05 Customer trust.

Do households and businesses understand the benefits, receive tailored support and know who will resolve problems?

06 Metering powers and safeguards.

Have we clarified applicable powers, customer choices and safeguards, including support before charging changes?

07 Transition and renewal.

Have we funded the whole service life and set evidence-based triggers for retiring legacy routes, systems and contracts?

08 Benefits and evidence.

Does each benefit have an operational owner, baseline and capacity to act, with credible results for regulatory scrutiny and future investment?

SECTION 6

Evidence and methodology

Moorhouse Consulting and M Group convened the Water Executive Forum so people with first-hand energy experience could talk about the similarities and differences of energy's smart rollout with water-sector leaders, consumer groups and regulatory voices. This paper combines Moorhouse's experience of energy and utility transformation programmes, customer operations, data and benefits realisation with M Group's practical knowledge of large-scale metering, field services, operations, and asset health. It is intended to encourage those involved in leading the future of smart water to join the conversation and surface thinking which goes beyond the obvious, using 15 years of smart energy as a valuable starting point.

How we used the evidence

Delivery examples and 'Water Executive Forum Voice' quotes used throughout this document are taken directly from the 'Chatham House' views expressed by water and energy industry leaders during the Water Executive Forum held September 2026, and may not necessarily represent empirical benchmarks, statements of participant consensus or existing regulatory requirements. Public sources are cited separately and were checked on 4 November 2026.



ENDNOTES

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Publication notes

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The value is not in the meter.

It is in what the meter and data enable.

About Moorhouse Consulting and M Group

MOORHOUSE CONSULTING

Moorhouse Consulting helps water companies, energy suppliers, energy networks and utilities regulators deliver complex transformation programmes, design strategy and customer engagement approaches, and harness data, process, and AI. For smart water, we bring together our specific experience of energy's smart rollout and our expertise in water to ensure multifunctional portfolios of work are managed effectively, outcomes are delivered, and benefits are sustained long-term.

M GROUP

M Group delivers and maintains essential infrastructure across energy and water. Its contribution is grounded in large-scale smart-meter deployment, field operations, workforce planning, asset health and the practical work needed to keep the service running after installation.

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Get in touch

if you'd like to discuss our recommendations for your organisation.



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