Smart Metering in the Australian Landscape (Strategic Focus)

Description: This report looks at the state of the smart metering market within the Australian utilities industry. It covers the underlying structure of the industry, the emergence and evolution of smart metering technology, the impact such technology will have on businesses and consumers, and recommendations for both IT vendors and enterprises looking to invest.

Scope

- Discusses the market for smart metering at a State and national level.
- Focuses primarily on the electricity distribution sector, as well as the impact on consumers.
- Includes recommendations for technology vendors and enterprises.

Highlights of this title

Based on the technology requirements of AMI implementations, a range of vendor engagements will be required. Within the Australian market, large systems integrators including Logica, Accenture and IBM have been engaged in a consultative fashion to provide advice on AMI strategies and implementations.

Key reasons to purchase this title

- Understand the underlying structure and regulatory environment in the Australian utilities industry.
- Gain insight into Datamonitor’s view of the smart metering market in the Australian electricity sector.
- View Datamonitor's recommendations for both enterprises and technology vendors within this market.

Contents:

Overview
Catalyst
Summary

Key Messages

Smart metering technology continues to be a hot topic in Australia
A range of smart metering projects are already underway in Australia
The overall architecture of AMI spans networks, hardware and software
A range of technology-related issues are emerging
A range of delivery and customer processes are enhanced by smart meters
The cultural change required for AMI rollouts should not be underestimated
The competitive landscape is continuing to shift as vendors jostle for opportunities

Market Opportunity

The Australian utilities sector is growing under national regulation
The ecosystem is heavily regulated by AEMO and its components
NEMMCO manages NEM transactions
AEMO has assumed control of six key industry bodies
But that is not the end of regulatory bodies
The overall utility sector is still showing signs of growth within Australia
Electricity prices are continuing to rise for Australian consumers
The Australian utility value chain is typically structured around states
New South Wales is the largest electricity sector in Australia
Regulation
Electricity networks
Retail sector
Privatization issues continue to feature in industry and government discussions
Victoria is heavily deregulated
Regulation
Electricity networks
Retail sector
Western Australia is independent of the NEM
Regulation
Electricity networks
Retail sector
Queensland is a highly energy intensive economy
Regulation
Electricity networks
Retail sector
South Australia has just one distributor
Regulation
Electricity networks
Retail sector
Tasmania maintains a single distributor and retailer model
Regulation
Electricity network
Retail sector
The Northern Territory is dominated by Power and Water Corp
The Australian Capital Territory relies primarily upon ActewAGL
Smart metering technology continues to be a hot topic in Australia
The basic structure of smart metering implementations is network-centric
Deployment will depend on each distributor
A range of benefits are driving smart metering investments
Greater information around energy usage will benefit consumers
Distributors stand to gain from smart metering projects
Smart meters offer a range of initiatives for retailers in an increasingly competitive market
Smart meters and smart grids are often confused
Smart meters are part of a natural evolution for electricity networks
A range of smart metering projects are already underway in Australia
National guidance is being driven by the Council Of Australian Governments
Functional requirements are still being determined
Regulations are being put in place but questions remain
Utilities have been looking at smart metering for some time
Current projects in Victoria
CitiPower and Powercor
Jemena and United Energy Distribution
SP Ausnet
Current projects in New South Wales
EnergyAustralia
Country Energy
Integral Energy
Current projects in Queensland
Energex/Ergon Energy
Current projects in South Australia - ETSA Utilities
Current projects in Western Australia
Western Power
Current projects in Northern Territory - Power and Water Corp
Technology Evolution
The overall architecture of AMI spans networks, hardware and software
Conceptual data flows highlight the key requirements of smart meter implementations
The full architecture can be complex
Network technology offers a range of options to utilities
Meter data management is essential to handle the volumes of data coming from smart meters
Integration with core systems will be needed to extract benefits for utilities
Providing users with relevant information will be a challenge for businesses
Security needs to be considered throughout AMI implementations
Dashboards and decision support provide executives and decision makers with insight
AMI projects will rely upon middleware and datacenters
The resulting opportunity for vendors is significant
The in-home meter is the most desired method of interaction for consumers
A range of technology-related issues are emerging
Payment for AMI projects will be shared by value chain partners
Distributors should be responsible for holding meter data
Cloud computing is not expected to have a significant role in the smart meter market
The National Broadband Network may deliver future benefits but its impact now is low

Customer Impact: Smart Enablement
A range of delivery and customer processes are enhanced by smart meters
Meter accuracy has been an issue for utilities for some time now
Peak demand can be better managed to reduce overall costs for utility companies
The cultural change required for AMI rollouts should not be underestimated
AMI will affect almost all employees within a utility company
Infrastructure networks are being opened for the first time
Smart meter assets will need to be treated differently
Business processes are going to need refinement
Those consumers already using smart meters are finding benefit

Competitive Landscape
Services-centric vendors
Accenture
Bilfinger Berger Services Australasia (BBSAA)
 CSC
 HP
 IBM
 Logica
 UXC
 Software-centric vendors
eMeter
Itron
Oracle
SAP
Communications and network-centric vendors
Alcatel Lucent
Cisco
Silver Spring Networks (SSN)

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Action points for technology vendors

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