

Appendix B: Case Study Template

Description:

A general description of the project. Include information on the duration of the trial. Are any results / outcomes available. If the project is on-going, when is it expected to be completed, when will results be available.

Customers Involved:

Describe the customer types involved in the trial, and the numbers of customers involved.

Technologies Deployed:

Description of technologies deployed

Customer Offerings:

Description of customer offerings – i.e. the commercial arrangements – including tariffs, penalties etc.

Customer Engagement Approach:

How were customers recruited? Did they voluntarily opt in, did they opt out?

Was there a special focus on trying to aim to create 'enthusiasm for the smart meters/smart grids by the households/SMEs. If so, what was the approach taken.

Smart Metering:

Describe the metering arrangements in place, and what the smart meter was used for – i.e. to collect data for billing, to feedback information to customer, information on energy prices, to directly control loads.

Tariff:

What type of tariff did the initiative include?

For example, Time of Use pricing, Critical Peak Pricing etc

Did customer's voluntarily opt-in, or was it mandatory?

If it was a trial / pilot – how long did it run for? What happened to the customers at the end – did they continue with the same tariff.

If it was a voluntary opt-in arrangement, how many customers dropped out during the trial. What were the reasons for customers leaving the scheme?

What were consumer experiences?

What aspects did consumers like? Did any aspects raise concerns or complaints?

Remote / Automatic Control of Appliances:

Did the trial involve any remote or automatic control of appliances / end-use loads?

What approach was taken to ensuring consumer acceptance or acceptability of the controls?

Was it a voluntary 'opt-in'?

Was there the option for manual override under certain circumstances/

What were consumer experiences?

What aspects did consumers like? Did any aspects raise concerns or complaints?

Information and Data Sharing:

What information (energy data) was shared, and who was the data shared with. Were any third party organisations involved?

Were any specific difficulties encountered?

Were any specific consumer concerns encountered?

Were consumers actively aware of how their data was being used, and by whom? How was this explained to consumers?

How was the energy consumption information used? Examples might include:

- to provide direct feedback to the consumer
- to provide more accurate billing for the consumer
- to assist the Network Operator manage the network better
- to assist the Energy Retailer to detect fraud, provide better customer service etc.

Advice / Customer Engagement:

What method(s) were used to inform customers about the trial, and about what actions they could take to modify their energy consumption (both the pattern of consumption and amount of consumption). Was engagement provided upfront only, or was it on-going?

What advice was provided?

Who provided the information? To what extent was information personalised to the needs of each individual, or was it general advice?

Was advice provided 'face-to-face' or via general leaflets or information campaigns.

Where there particular concerns or issues that needed to be addressed either at the outset or once the trial/project was underway?

Results:

Summary of energy savings, peak load savings.

Key Lessons Learnt (to date):

- Key lessons
- What were the key learning points – what went well, what when badly
- What was the customer experience – what aspects were viewed positively, what aspects were viewed negatively.

Major Barriers Encountered (to date):

- Key barriers

References:

Links to sources of information / reports / presentations etc