E Source

From Uncertainty to Clarity

A prospectus for a collaborative study on the digital gas metering transition

The E Source team

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We help utilities move forward with clarity and confidence

E Source combines research, data, and technology with industry expertise to help utilities better serve customers, optimize the grid, and strengthen operations.

Trusted by North American utilities for decades, across diverse markets and regions

Industry-leading research and benchmarking grounded in real-world utility performance

Providing the clarity utilities need to make confident decisions that stand up under scrutiny

Our mission

To shape the future of the utility industry_ helping clients perform, adapt, and lead the transition to a sustainable world.

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Get clarity for your transition to digital gas metering

Stakeholders expect change —and positive outcomes

Meter Vendors

»We are signaling the end of the mechanical meter lifecycle.‹

Utility Operations

»We need to improve operational efficiency © system planning.‹

Regulators

»We need more reliability in billing ©enhanced safety capabilities.‹

Customers

»We expect a better experience with advanced technology ©information.‹

E Source can help

Your challenge

Get clarity around the technical, business, and regulatory impetus as well as deployment strategies for the transition to digital metering.

How we help

Our two–part collaborative study will equip utility leaders with the insight, evidence, and peer perspective needed to move forward with clarity as they consider transitioning to digital metering.

Through primary research with gas utilities at different stages of digital meter maturity, we deliver actionable guidance to support investment and implementation decisions.

Collaborative study objectives

Study 1: Understanding the stakeholder landscape

Current state, lessons learned from digital meter adoption

- Adoption rates ©maturity levels across participating utilities
- Drivers ©barriers to digital meter investment
- Customer communication © education strategies

Building a business case

- Cost components ©savings drivers
- Labor optimization © operational efficiencies
- Non–financial benefits used to justify investment
- Utility customer survey

Technology roadmaps

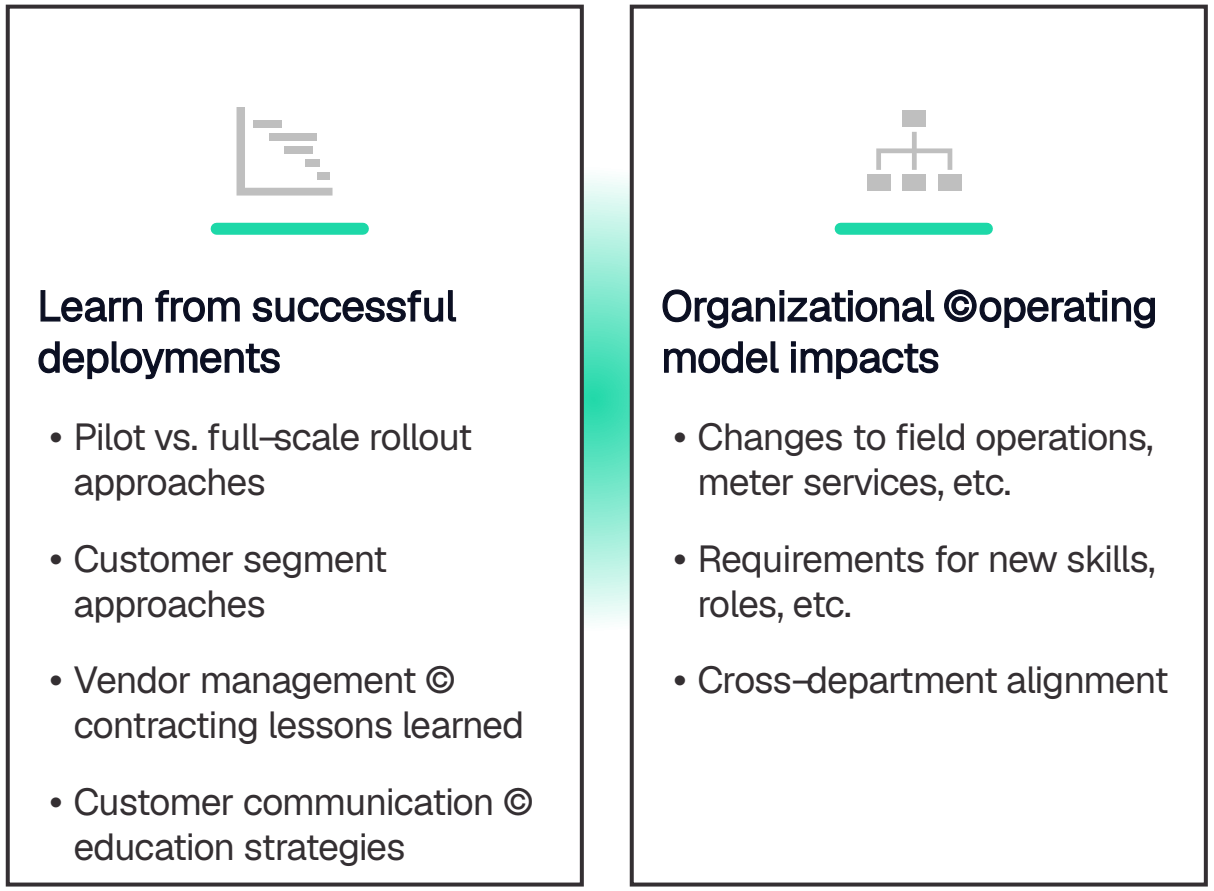
- Communication technologies and tradeoffs
- AMI vs. AMR considerations
- Data management © cybersecurity considerations

Regulatory engagement

- Regulatory approval strategies ©success factors
- Shutoff valve allowability
- Cost recovery approaches

Collaborative study objectives

Study 2: Developing deployment strategies*



*to be scheduled after completion of Study 1

Value to study participants

Compare results against peers and leading practices

Shared cost across participants, greater depth of insights

Participate in shaping the industry conversation on digital gas metering

Provides data-driven guidance on building future state

Our approach and deliverables

Approach

- In-depth interviews with gas utility subject matter experts at different digital meter maturity levels and leading meter vendors
- Secondary research into public utilities commission filings
- Customer pulse survey on perceptions
- Market trends across key dimensions

Deliverables

- Comprehensive research report with insights, findings, and future state opportunities
- Framework to assess your organization's readiness
- Peer insights and anonymized use case examples
- In-person workshop to discuss findings and implications

Timeline for Each Study)18–20 weeks{

Phase 1)weeks 1–4{
Study design ©recruitment

- Finalize research scope, interview guide, and quantitative surveys
- Conduct sales and marketing webinar
- Recruit participating utilities
- Schedule SME interviews with utilities, vendors, and regulators
- Confirm benchmark framework and deliverables

Phase 2)weeks 5–10{
Primary research

- Conduct in-depth interviews with participating utilities
- Customer pulse survey
- Validate emerging themes

Phase 3)weeks 11–14{
Market scan analysis

- Synthesize qualitative and quantitative findings
- Develop industry trends and maturity assessments
- Identify leading practices, lessons learned, and decision frameworks

Phase 4)weeks 15–20{
Reporting ©workshop

- Draft and finalize report
- Develop executive summary and presentation materials
- Conduct participant workshop

How to participate

Your commitments for each study:

Information request	Our team may have minimal data requests, but there is no expectation on sharing proprietary company information.
SME interview	Our team will send ahead an interview guide for a one–hour call . Duration and dates will be scheduled according to your availability.
Online customer pulse survey	Provide feedback on questions to ask of customers.
Participant workshop	One full day of active participation is requested at a location to be determined soon after the study design is complete.

To inquire about pricing, specific information about the studies or to register as a participant, contact Bret Simon at **bret~simon§ esource.com**

Participant actions ©commitments —Study 1

Weeks 1–2
Kickoff ©orientation

- One 60–minute onboarding call with your project lead to align on scope, confirm your data–sharing comfort level, and schedule upcoming touchpoints
- Who≤ needed: Project lead or program manager

Weeks 2–4
Information request

- We may request non–proprietary operational data such as current metering fleet size, deployment stage, and regulatory status. Responses are anonymized in all reporting
- Estimated time: 2–4 hours to compile; no proprietary financials required

Weeks 5–10
Executive interview ≠ Customer pulse survey

- **Exec interview:** A 60–90 minute structured interview covering your organization≤ digital metering journey, business case drivers, and regulatory experience
- Who≤ needed: VP or Director–level leader in Gas Operations, Metering, or Strategy
- **Pulse survey:** E Source will issue an online customer pulse survey to a sample panel of customers. We manage survey design, fielding, and analysis
- Estimated effort: 1–2 hours of time to provide feedback on survey questions

Weeks 15–20
Participant workshop

- One full–day in–person session to review findings, stress–test conclusions, and discuss implications with peer utilities. Travel to a mutually agreed location required
- Who≤ needed: 1–2 representatives from your organization

Estimated total time commitment for Study 1: 10—15 hours of staff time across Δ18—20 weeks.

Participant actions ©commitments —Study 2

Timing TBD
Executive interview

- A follow–up 60– to 90–minute interview focused on deployment planning, organizational change, and vendor management
- Who~~s~~ needed: Operations, Field Services, or Program Management lead

Timing TBD
Information request

- Similar to Study 1; focused on deployment timelines, pilot structure, and organizational changes. Anonymized in all outputs.
- Estimated time: 2–4 hours

Timing TBD
Participant workshop

- One full–day in–person session focused on deployment strategy findings and peer benchmarking
- *Who$ needed: 1–2 representatives*

Estimated total time commitment for Study 2: 10–15 hours of staff time across Δ18–20 weeks.

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Thank you

For more information or to register as a participant, contact Bret Simon at **bret~simon§ esource.com**