

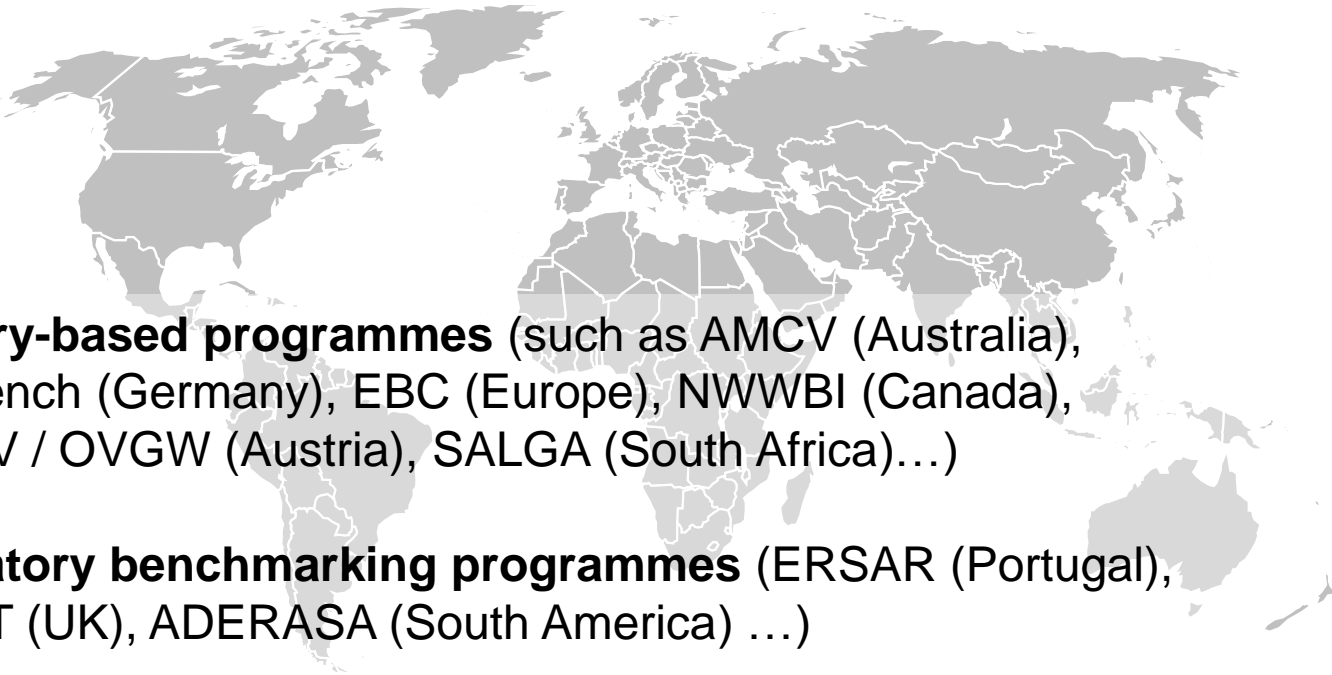
# Does a new ISO Benchmarking standard (ISO 24523:2017) support our benchmarking practice?

IWA Pi 2017 - Specialist Conference on Benchmarking and Performance Assessment

Filip Bertzbach

Vienna, May 15, 2017

## Strong experience in benchmarking in the water sector since more than 20 years with more than 200 initiatives\*



- **Industry-based programmes** (such as AMCV (Australia), aquabench (Germany), EBC (Europe), NWWBI (Canada), OEWAV / OVGW (Austria), SALGA (South Africa)...)
- **Regulatory benchmarking programmes** (ERSAR (Portugal), OFWAT (UK), ADERASA (South America) ...)
- **International organisations** (IB-Net, GWOPA ...)

\*A review (International Benchmarking Review by WRc) identified about 160 benchmarking initiatives in the global water sector in 2001 (cited by S.Berg, *Water Utility Benchmarking*, IWA Publishing, London, 2010)

ISO  
24523

## Self-regulation of benchmarking (by the industry)

## Common understanding (as a learning tool)

## Practical guideline

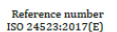
Activités de service relatives aux systèmes d'alimentation en eau potable et aux systèmes d'assainissement — Lignes directrices pour le benchmarking des services publics de l'eau

(by the industry)

activities relating to drinking water supply systems and wastewater systems — Guidelines for benchmarking of water utilities

Activités de service relatives aux systèmes d'alimentation en eau potable et aux systèmes d'assainissement — Lignes directrices pour le benchmarking des services publics de l'eau

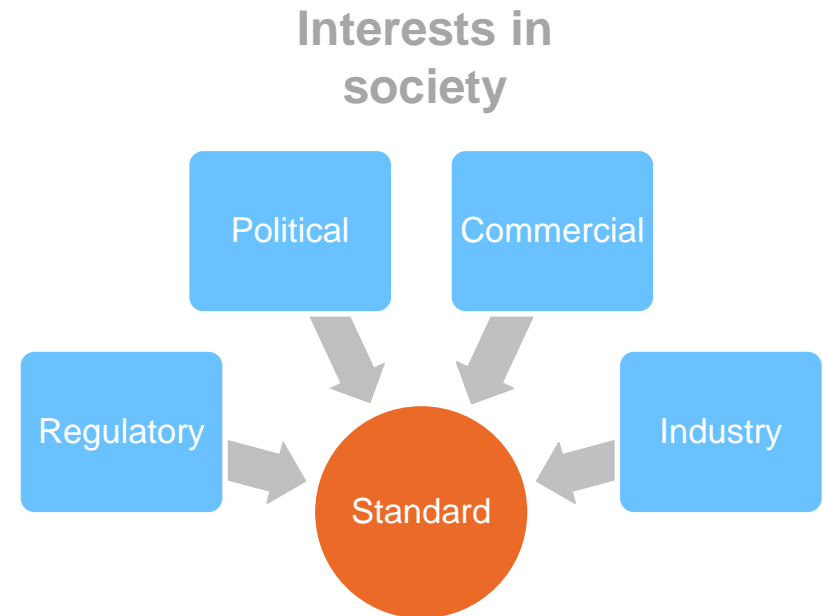
Learning tool)



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## ISO-Standards are a way of self-regulation

- Since **2002 water experts** working on management concepts in ISO\*.
- From **2014 to 2017** experts worked on a standard of “benchmarking for water utilities”.
- ISO has published **21,579 standards** since 1947(to answer the question “What's the best way of doing this?”)
- DIN (German Standardization organization) calls the work on standards a “public private partnership” and a way of “**deregulation**”.



\*Technical Committee “ISO/TC 224 - Service activities relating to drinking water supply systems and wastewater systems”

## Example - Public discussion in Europe on benchmarking and transparency

- ISO-Standard helps in public discussion.

“...invites the Commission **to set up a benchmarking system** ... in order to improve the quality of public water supply and sanitation services across the EU, and **as a way of empowering citizens.**”

Report on the follow-up to the European Citizens' Initiative Right2Water/ EU-Parliament 09/2015

Bench-  
marking

“Calls on the Commission to act as a facilitator to promote cooperation amongst water operators ... **by supporting voluntary benchmarking exercises.**”

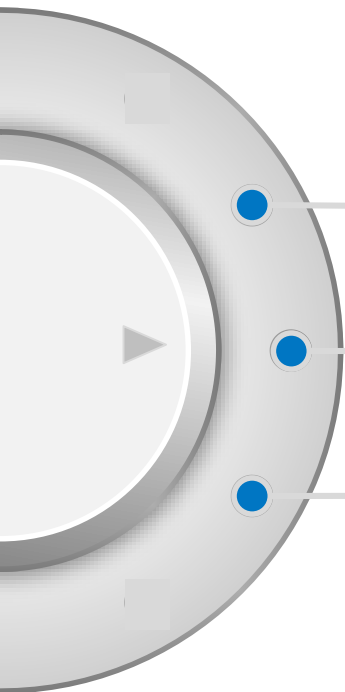
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# Does a new ISO Benchmarking standard support our benchmarking practice?

INTERNATIONAL  
STANDARD

**ISO  
24523**

First edition  
2017-02



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Nur für die Normenarbeit



Reference number  
ISO 24523:2017(E)

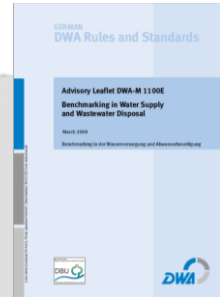
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## Understanding of benchmarking as learning tool

- First draft of standard was based on German standard on benchmarking (from 2008).
- Terminology and understanding of benchmarking of IWA Manual was integrated (2011).
- ISO 24523 builds on common understanding as „learning tool“.

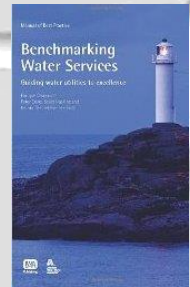
“Benchmarking is the **systematic** and continuous process for the identification of becoming acquainted with and **adaptation of successful instruments, methods and processes** from benchmarking partners identified as being better.”

German Associations DVGW, DWA, 2008)



“Benchmarking is a tool for performance improvement through **systematic** search and **adaptation of leading practices**.”

IWA Manual of Best Practices, “Benchmarking Water Services” (Cabrera Jr. et al. 2011)

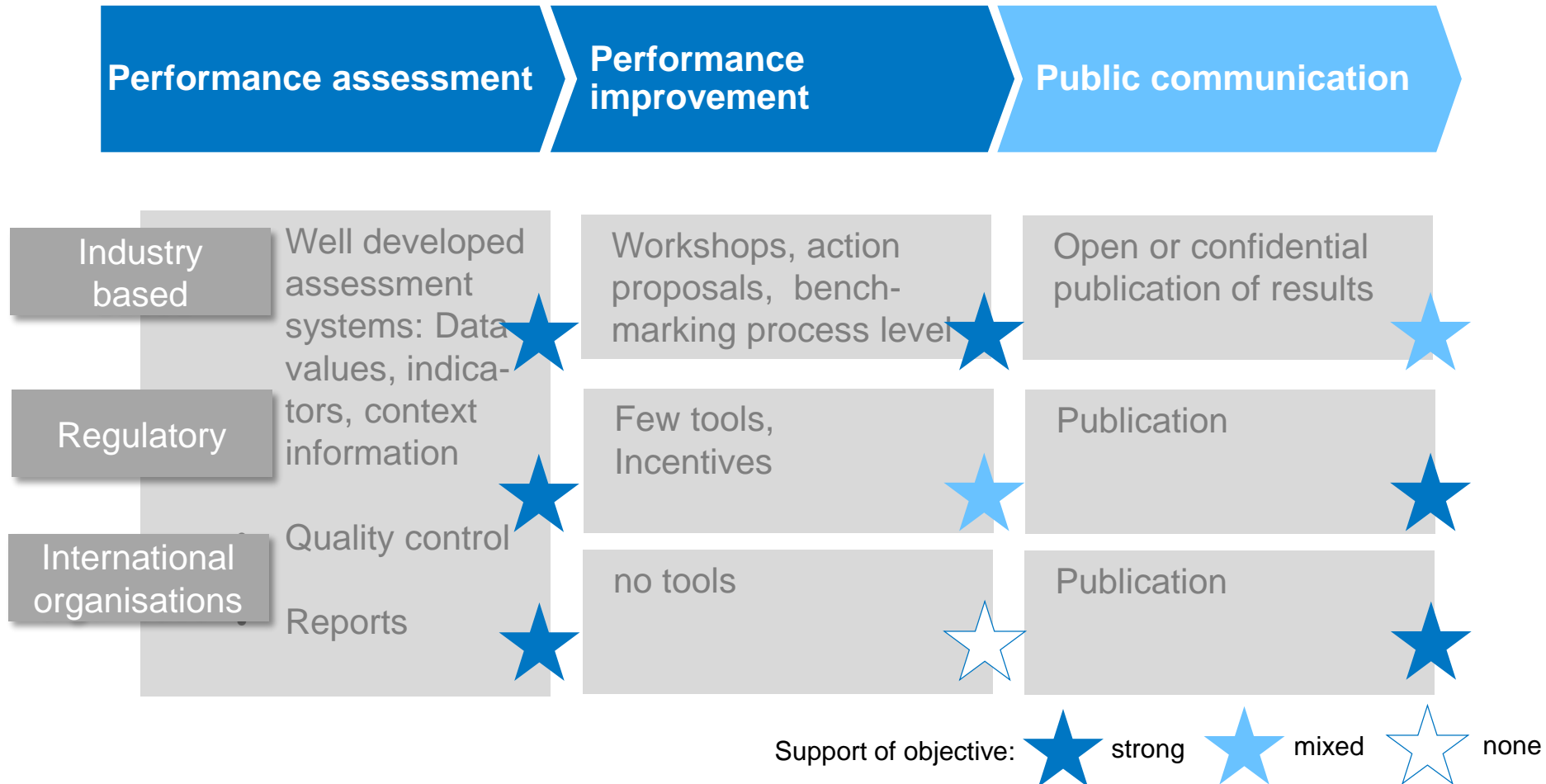


“Benchmarking - **systematic** process for the identification of, becoming acquainted with and for **adoption of successful practices** of benchmarking partners”

ISO 24523:2017 Guidelines for Benchmarking of Water utilities



## Different practice of benchmarking in reality



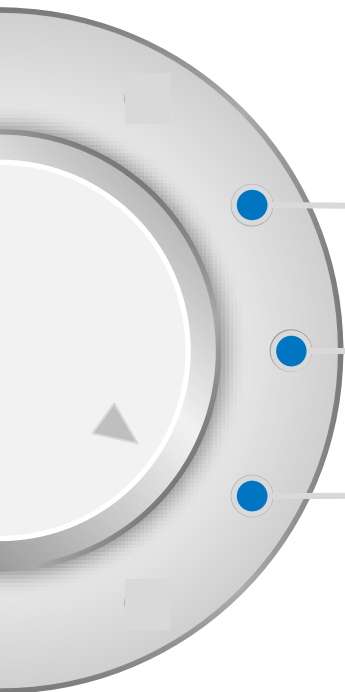


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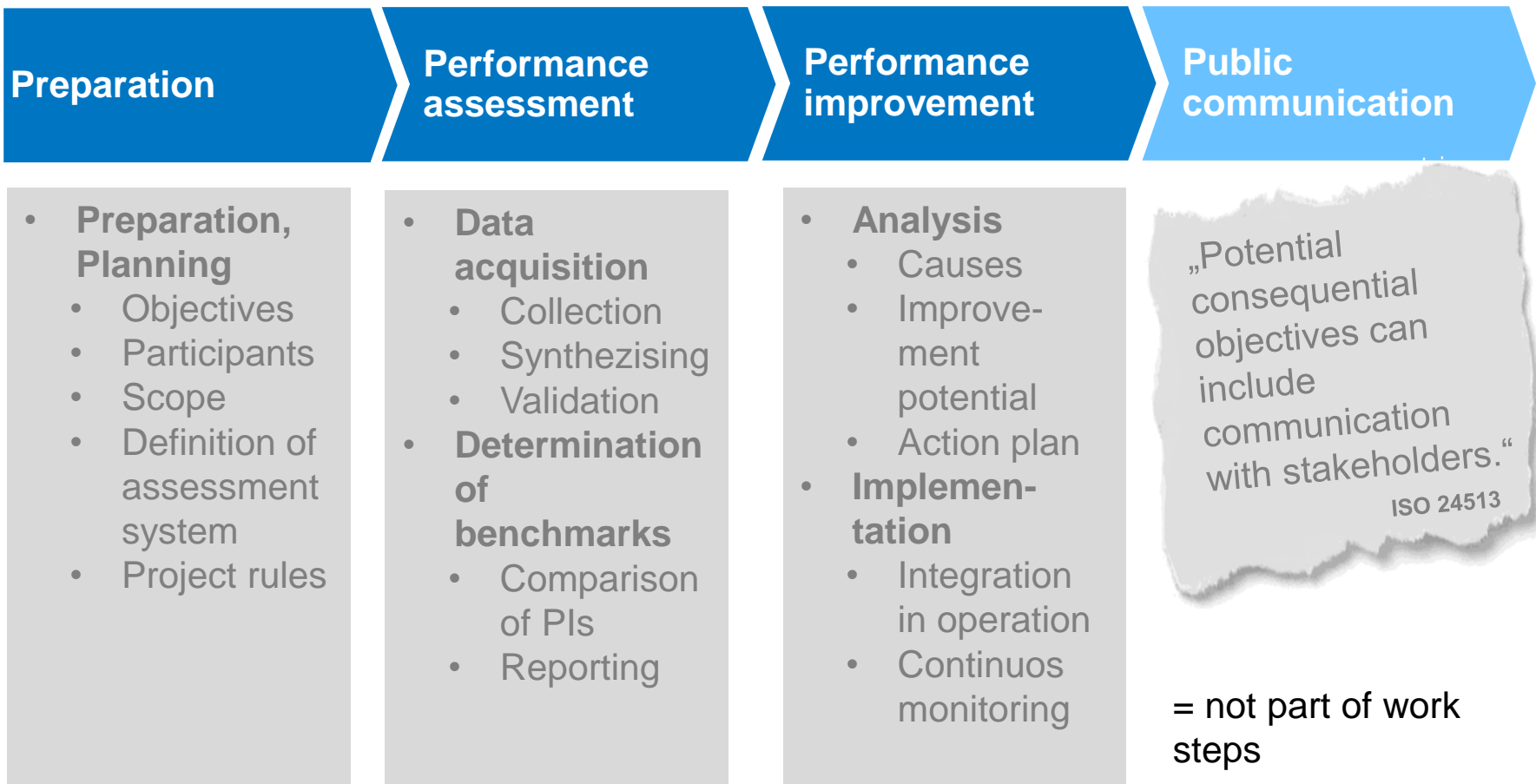
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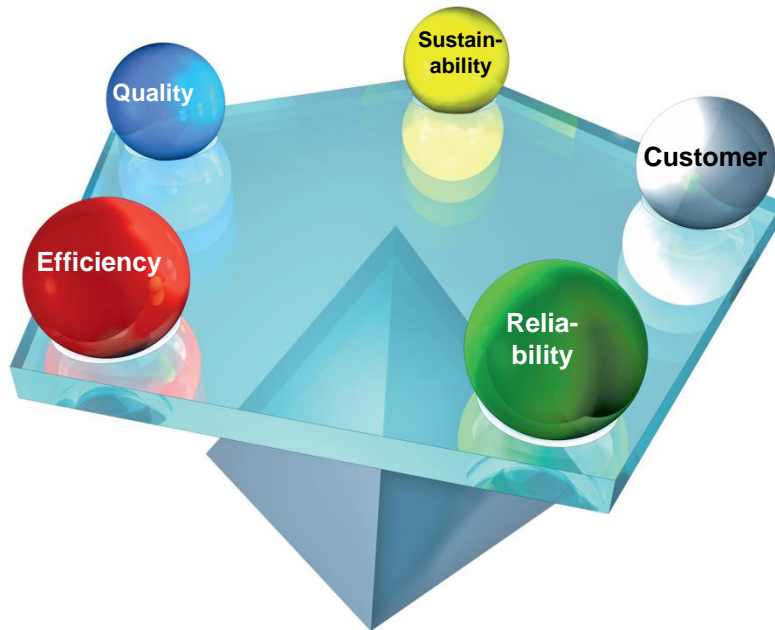
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# Guideline for works steps in benchmarking\*



\* Integrating structure of IWA benchmarking framework

## Success factor – Performance categories to be balanced by local management



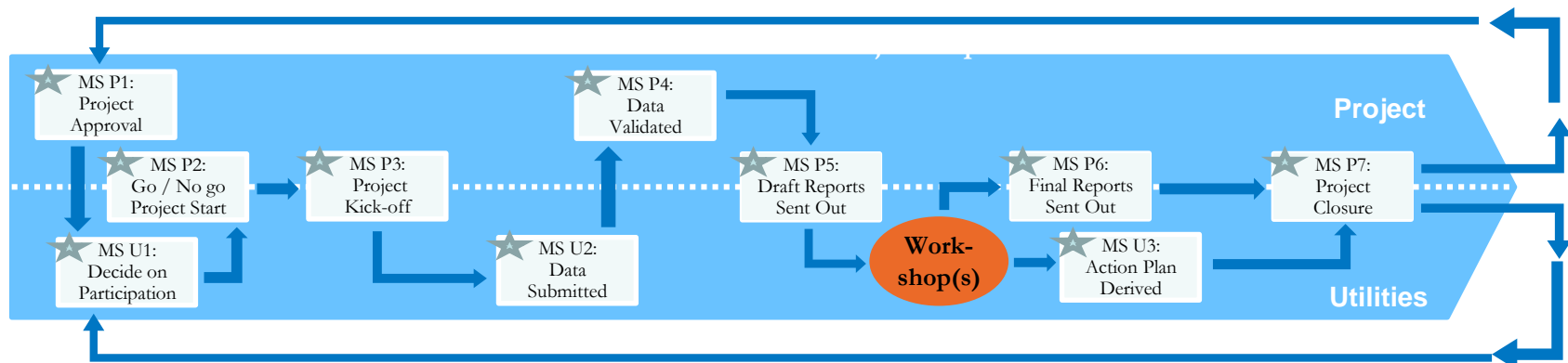
„Performance indicator systems should record the **various performance categories** taking into account the respective local conditions and enable an evaluation.“

ISO 24523:2017

„**Management know-how** is **needed** when interpreting and analysing the results of performance assessment and in drawing conclusions.“

ISO 24523:2017

## Success factor – Workshops and communication



Source (adapted): IWA Manual of Best Practices, "Benchmarking Water Services" (Cabrera Jr. et al. 2011)

"The key to success is communication and teamwork"

National Water and Wastewater Benchmarking Initiative Canada, 2008



".. the persons immediately responsible for the object and result, such as technicians/foremen or plant engineers, should be involved ...."

".. Recommendation: Execution of workshop...."

ISO 24523.2017

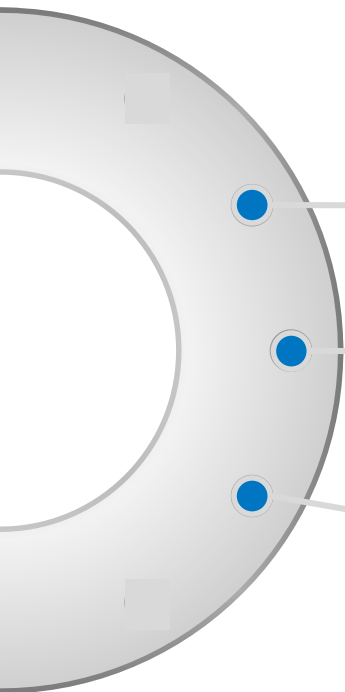
## Success factor - Confidentiality



„The **confidentiality** with regard to third parties is an **essential prerequisite** for the necessary openness of the benchmarking partners in the exchange of opinions and data.“

ISO 24513:2017

# Does a new ISO Benchmarking standard support our benchmarking practice?



Its practical function as **tool for “self-regulation”** depends on role of ISO standards in each country.

It understands benchmarking as **“learning tool”**.

It provides **guidelines** and stresses **success factors** for performances assessment and performance improvement.

ISO 24523:2017(E)	
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