Pennon Stakeholder Forum

Wednesday 26 April
10:00 – 13:00

South West Water
Bournemouth Water
BRISTOL WATER

Housekeeping

- For those here **in person:**
  - No planned fire drills
- For those joining us **online**:
  - Please mute yourself during presentations
  - Please turn your camera on during the discussions (if your internet allows)
  - If you have any questions during the presentations, please use the chat function and we will endeavour to respond
- After each presentation, we will host breakout discussions around your tables. For those **online**, you will be moved to breakout rooms for the discussions. These will start and end automatically. You don't need to press any buttons
- We would like to record today's workshop and take some photos. If you are not comfortable being recorded, please send a message in the chat to Vincent Luxmoore, or make yourself known to the team if you're here in person
- After each discussion session, we will ask you to vote on a series of questions using Slido. You will need a mobile phone or iPad to vote so please have one handy
- **WiFi,** "Sandy Park WiFi". No password required

What we will cover today

1. Welcome, background and context
2. Storm Overflows / DWMP
3. Waterfit Live
4. Water Resources / Drought
5. Our PR24 Business Plan

Close at 13:00

Welcome, background and context

Carolyn Cadman

Director of Natural Resources

Stakeholder Forum
Let's talk water

South West Water
Bournemouth Water
BRISTOL WATER

South West Water

water services

wastewater services

c. 1.8 million
population served

450 million litres
of drinking water per day

Supplying Cornwall, the Isles of Scilly, Devon and small areas of Dorset and Somerset

Bournemouth Water

water services

c. 500,000
population served

140 million litres
of drinking water per day

Supplying parts of Dorset, Hampshire and Wiltshire, from our base in Bournemouth

Bristol Water

water services

c. 1.2 million
population served

280 million litres
of drinking water per day

Supplying the city of Bristol, and surroundings from our base in Bristol

1/3
of all bathing waters in the UK

Important **mineral extraction** industry

Popular **tourist** destinations

25,000
agricultural land holdings

£2 billion
livestock industry

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slido

Discussion

Session One: Storm Overflows / DWMP

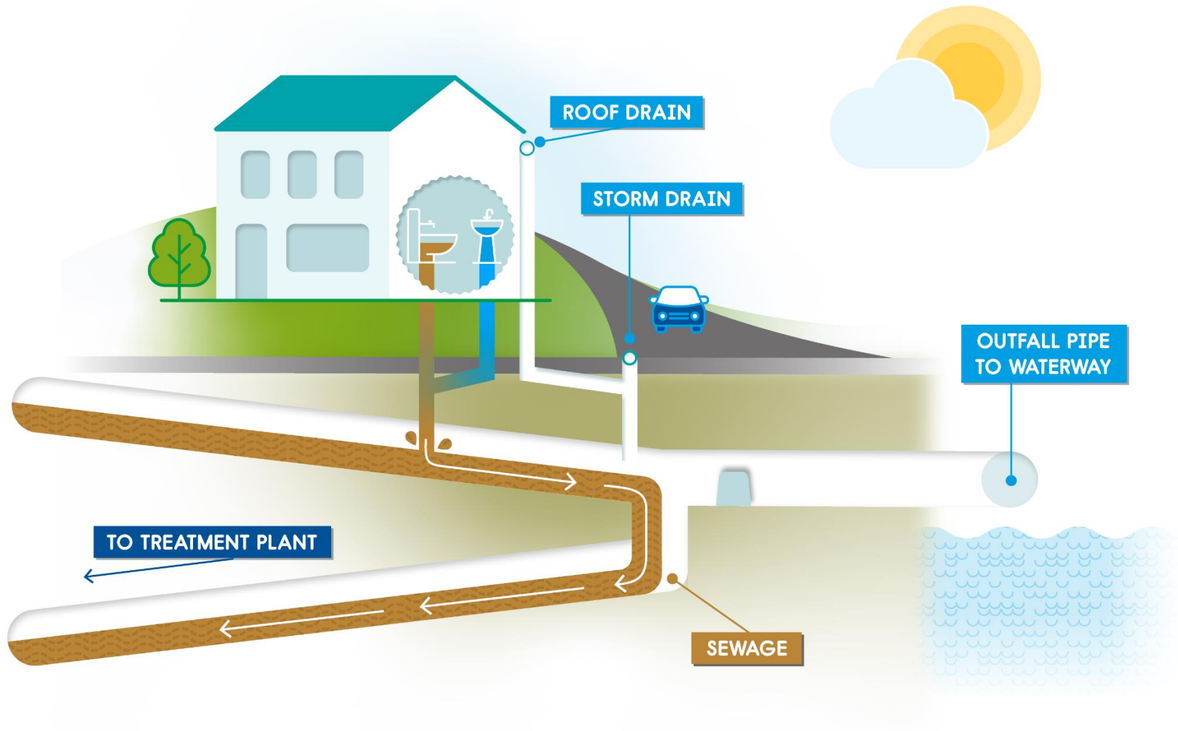
Alan Burrows

Director of Environmental Liaison and Culture
South West Water

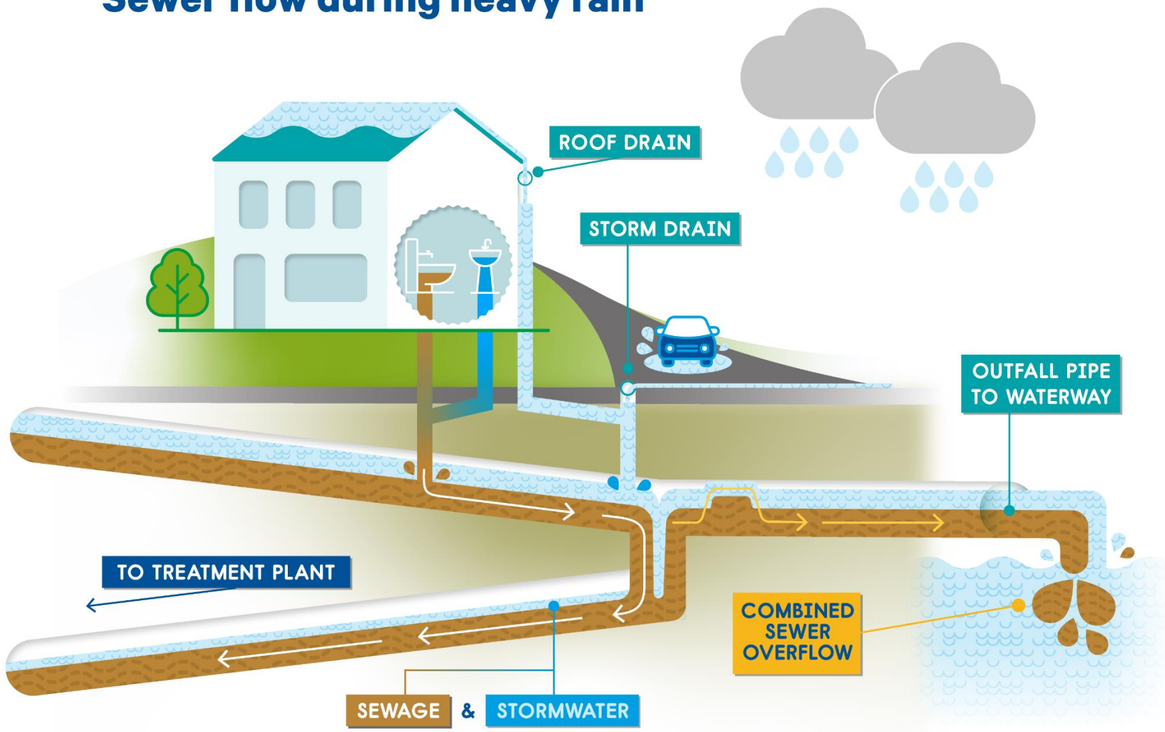
South West Water
Bournemouth Water
BRISTOL WATER

Storm Overflows – what are they?

Sewer flow during dry weather



Sewer flow during heavy rain



South West Water

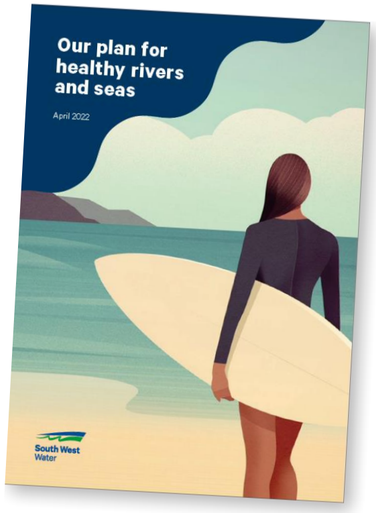
Bournemouth Water

Bristol Water


Why do we need storm overflows?
WaterFit

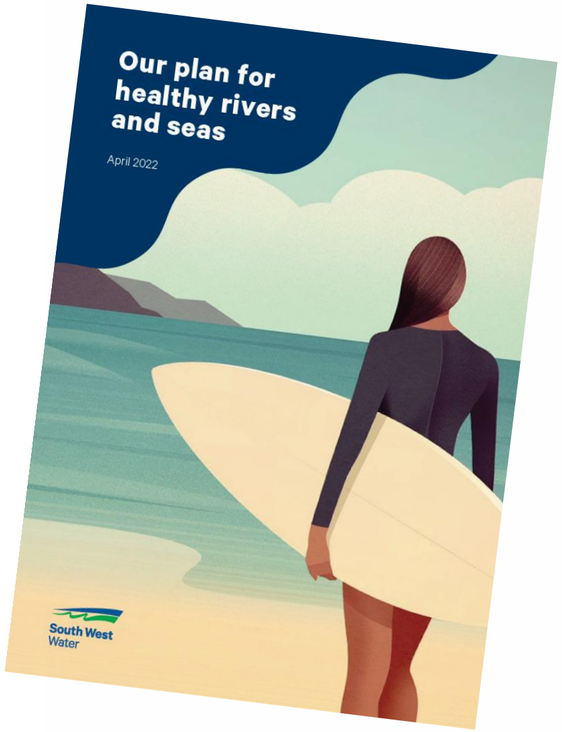
Investing to reduce storm overflows

- Waterfit investment of £330m reducing average spills per location to 20 per year by 2025.
- DWMP further investment reducing average spills per location to 10 per year by 2050.
- Accelerated delivery investment to start by 2025
- Significant investment planned for next 25 years



WaterFit – happening now...

- Additional treatment capacity at 59 wastewater treatment works
- Replacement of 54 inlet screens at wastewater treatment works
- Enhancements to pump stations
- Additional storm storage
- Root cause analysis of frequent spillers and rapid intervention for any quick wins
- Installation of 100% of all storm overflows
- WaterFit Live ... more on that to follow!



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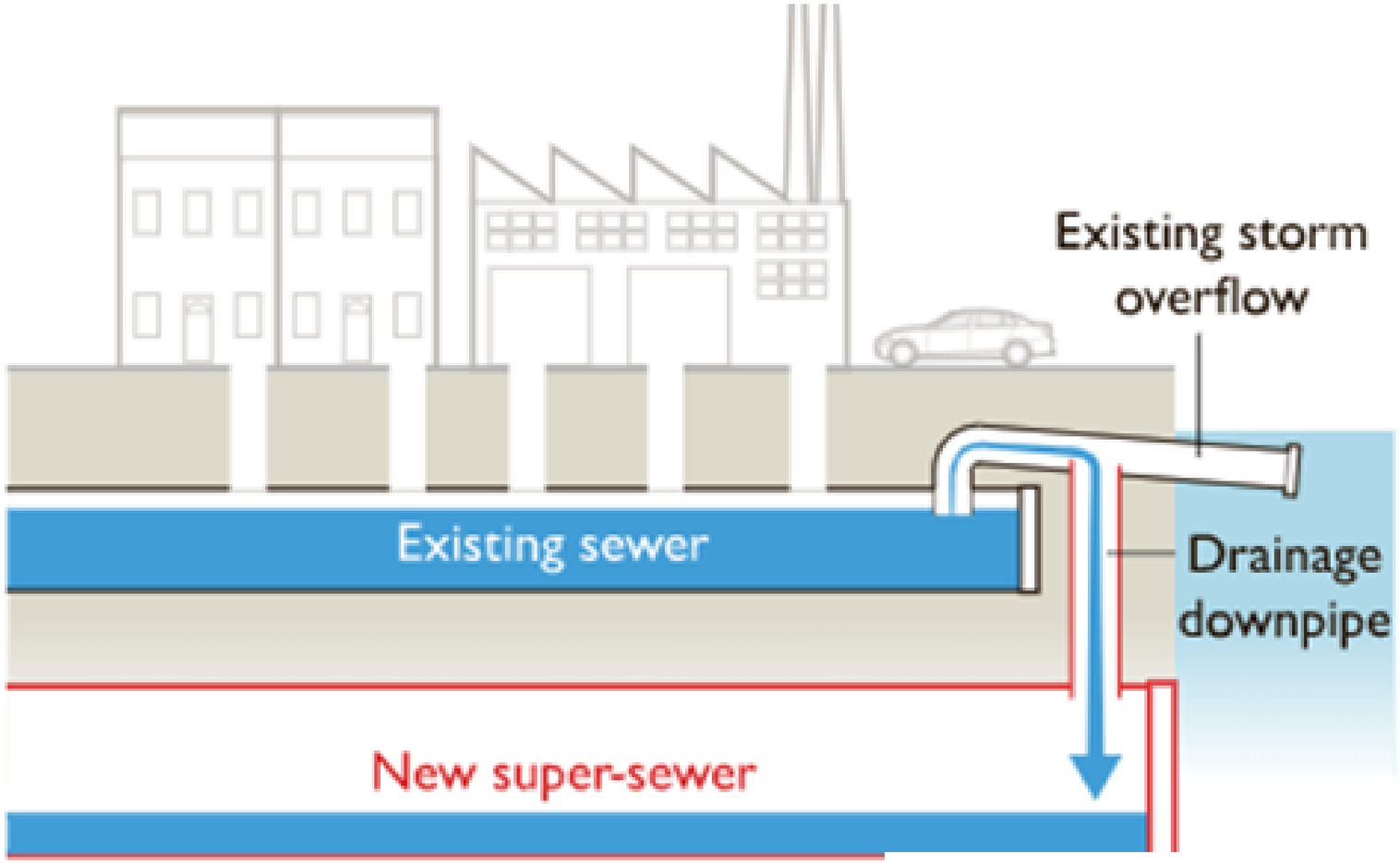
Bristol Water

What can we do to reduce spills...

1

Major infrastructure works such as Thames super-sewer

Storm overflows are diverted into new, larger sewer system more capable of dealing with the high demand



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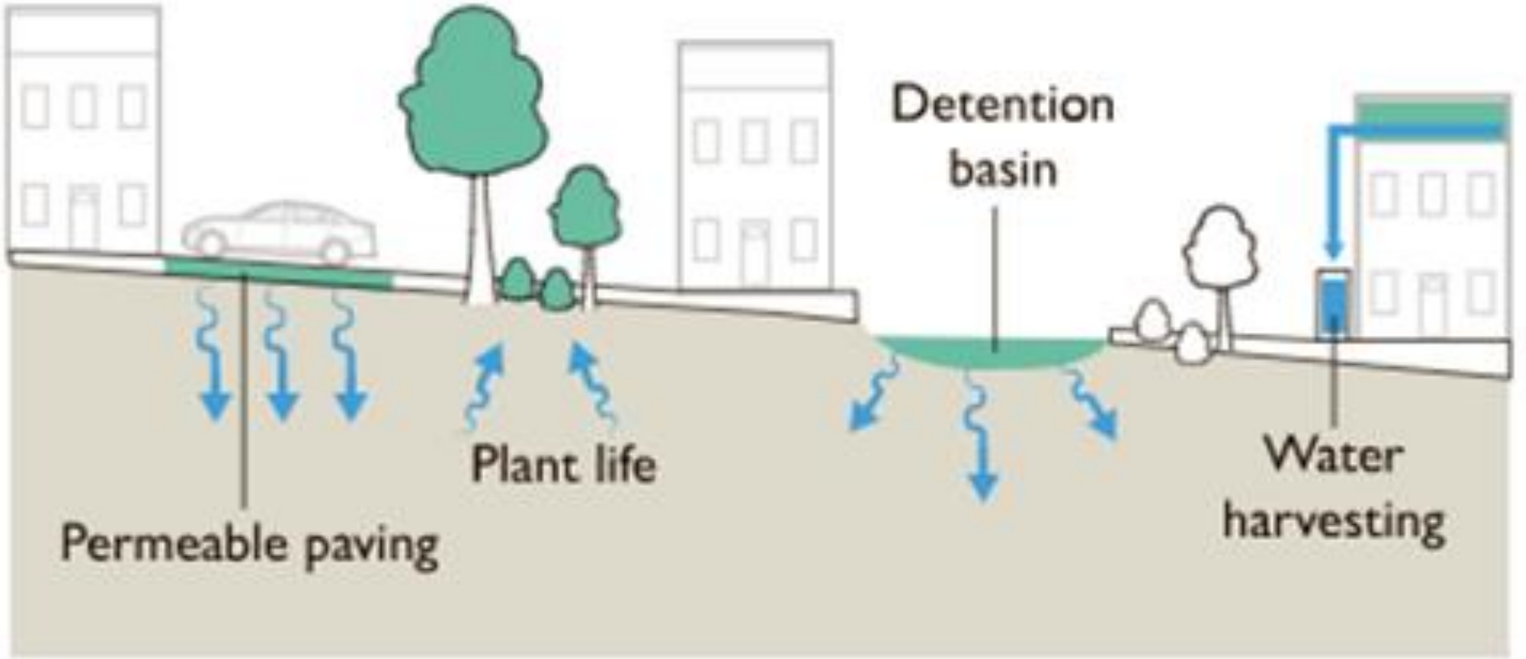
What can we do to reduce spills...

2

Sustainable urban drainage systems

A network of detention basins, permeable paving, water harvesting and planting greenery can help alleviate pressure on sewage pipes from storm drains



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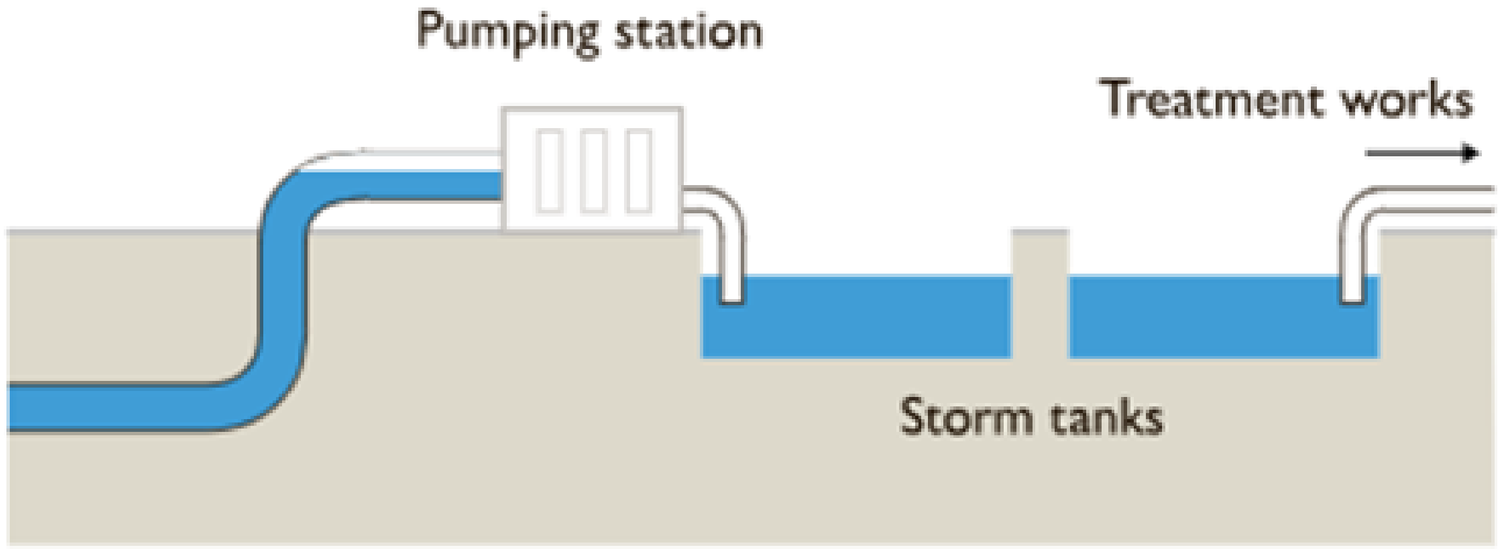
What can we do to reduce spills...

3

Extra storm tanks at treatment works

Sewage could be stored on-site at times of high rainfall, to later be treated, to avoid the spill



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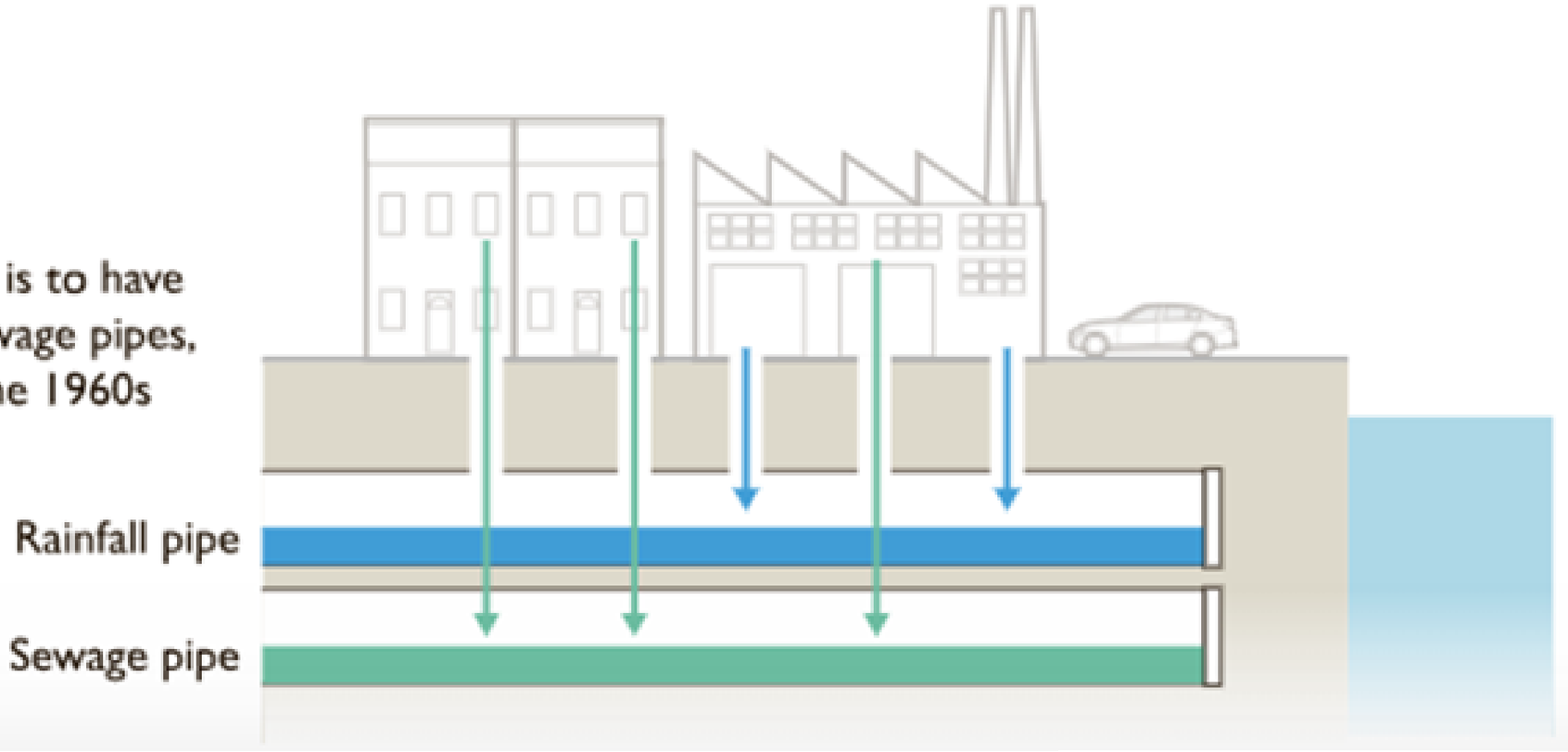
What can we do to reduce spills...

4

Separate pipes

Another (expensive) solution is to have more separate rainfall and sewage pipes, which have been built since the 1960s



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Reducing the use of storm overflows

South West Water has **1600 storm overflows of** which **790** spill more than 10 times per year. We plan to invest a total of **£3bn** by 2050 to ensure that no sites spill more than 10 times per year by 2050.

We are asking our customers about how fast we should implement our storm overflow programme in the context of the increase to their bills. The current average household combined bill level is **£476** (Devon, Cornwall). Other bill increases are expected to total around **£110 by 2030** before inflation.

	Short-term (2025 -2030)		Medium-term (2030 -2040)		Long-term (2040 -2050)	
						
Option A: Proposed plan	£54	280 sites	£65	280 sites	£63	230 sites
Option B: Accelerate investment (**quicker** than proposed plan)	£73	380 sites	£109	410 sites	£0	
Option C: Defer investment to medium term (**slower** than proposed plan)	£47	240 sites	£72	300 sites	£63	250 sites

BLUE MARBLE

Discussion

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Coffee Break

Stakeholder Forum
Let's talk water

South West Water
Bournemouth Water
BRISTOL WATER

Session Two: WaterFit Live

Stakeholder Forum
Let's talk water

Laura Flowerdew

Chief Customer and Digital Officer

South West Water
Bournemouth Water
BRISTOL WATER

South West Water

WaterFit

water fit for everyone

WaterFit

- Since privatisation, South West Water has invested c £3 billion in improving our wastewater network.
- This means all our bathing waters meet water quality standards, with 99% of them rated as ‘Good’ or ‘Excellent’ for 2022.
- However, with ever increasing usage of our rivers and seas, public perception has changed and we know there is work to do to improve water quality and ensure we meet the expectations of our customers and communities.
- Our WaterFit investment programme accelerates £330m of investment in our wastewater network to improve our performance and reduce the impact of our sewer network on the environment.
- Given the focus and expectation, we are keen to provide transparency and progress on what we are doing and what it will achieve.

WaterFit

“WaterFit Live provides accessible, up to date information on bathing water quality, giving customers and beachgoers knowledge of whether storm overflows are temporarily affecting bathing water quality.
It also gives more information on the work we are doing and investment we are making at beaches across the South West to improve water quality across our beautiful region.

We know our customers and communities are passionate about the quality of our beautiful bathing waters in the South West and are rightly are asking for more information.
We are launching WaterFit Live in response – to give customers clear information on the performance of our wastewater network; and our plans for reducing the use of storm overflow across our beautiful coastline.”

Pennon

South West Water

WaterFit live

water fit for everyone

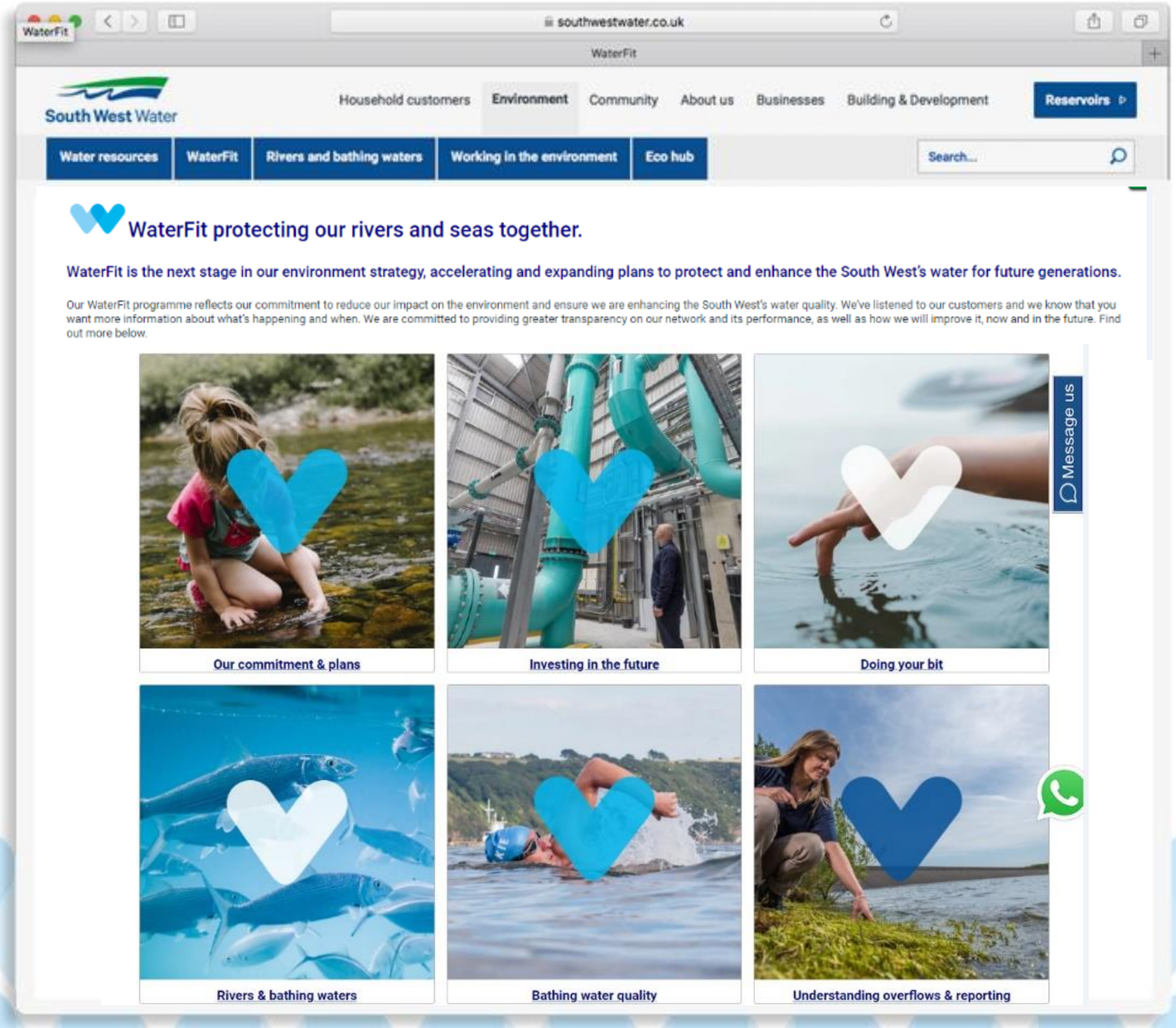
WaterFit

Our WaterFit Live website and map provides:

- Context and information related to our network, how it works and why it is designed as it is
- Historical and current information on our wastewater performance; and
- Our next steps – what we are doing to make a difference, including the targets we have committed to and the investment we are making to improve water quality.
- Ways in which customers and community groups can get involved and have their say in our work.

WaterFit landing page

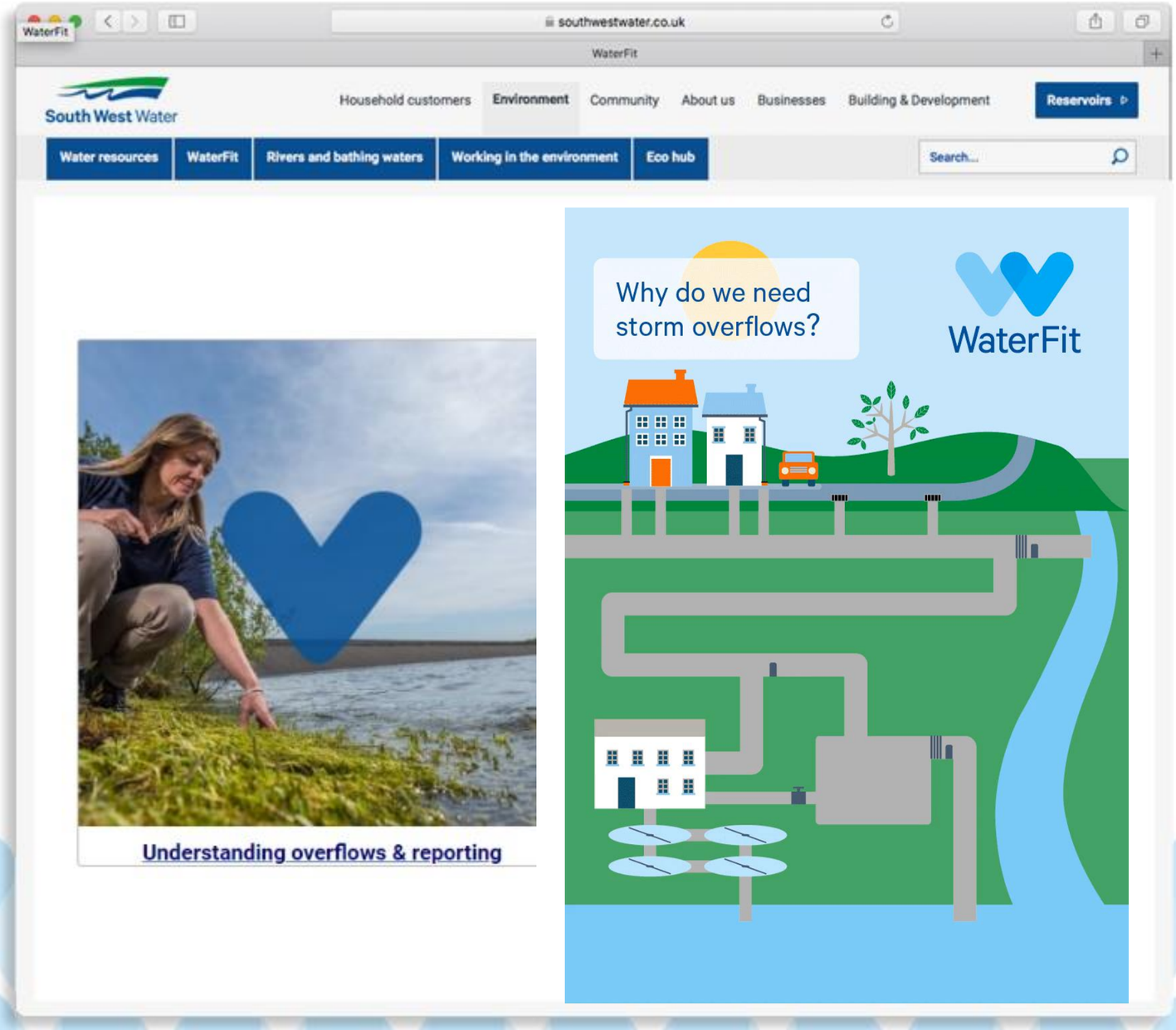
- Providing broader context giving information
- Clearly stating our commitments under WaterFit



WaterFit

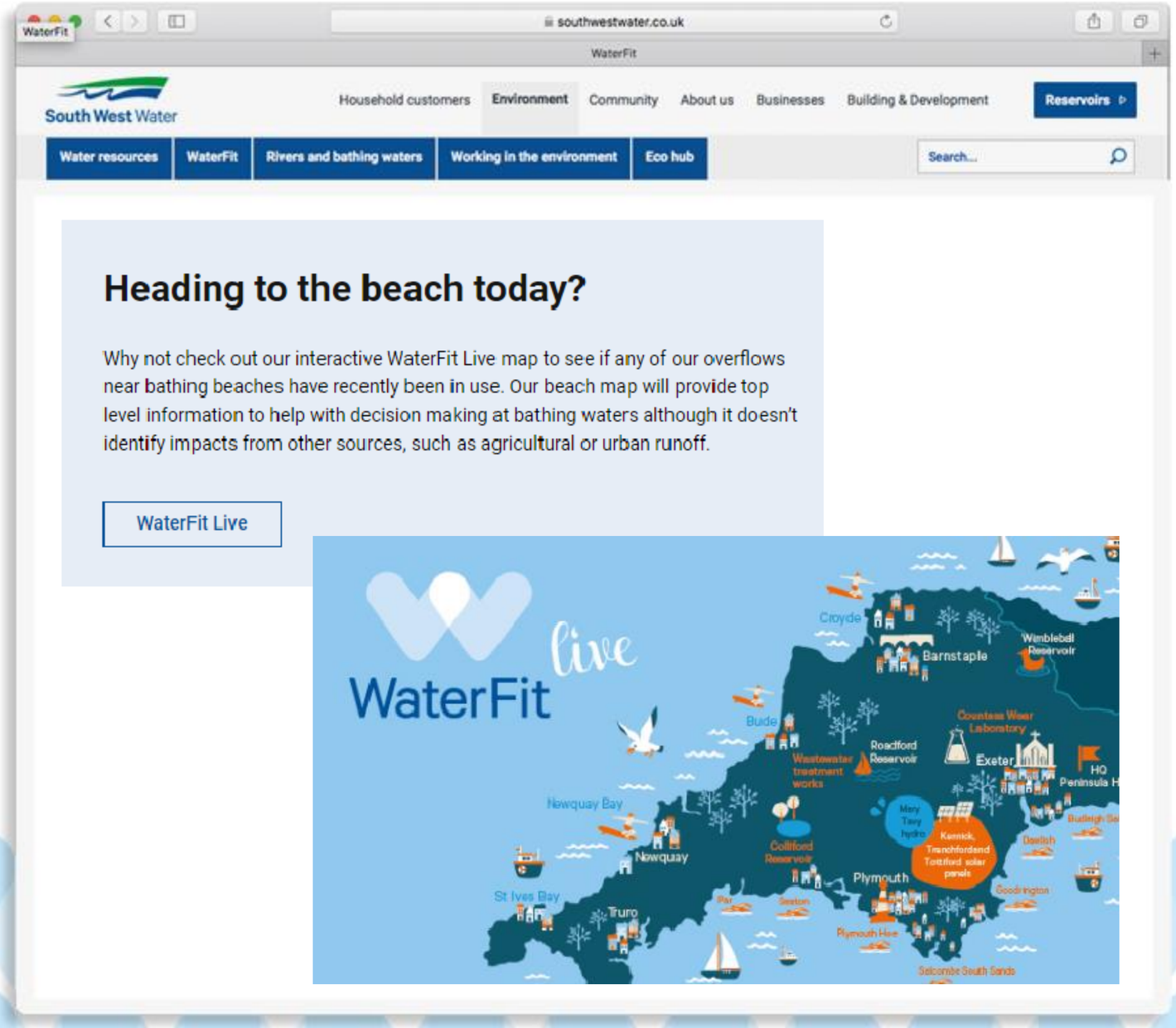
Providing context & narrative

- Simple facts
- Clear explanations
- Animations
- All help to inform the conversation around storm overflow use and our environment



WaterFit Live map

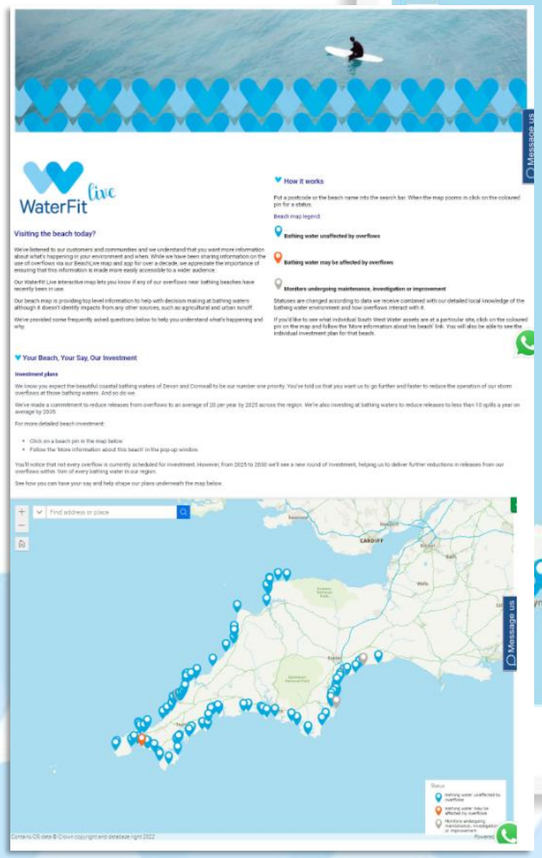
- Easy to find, simple to use

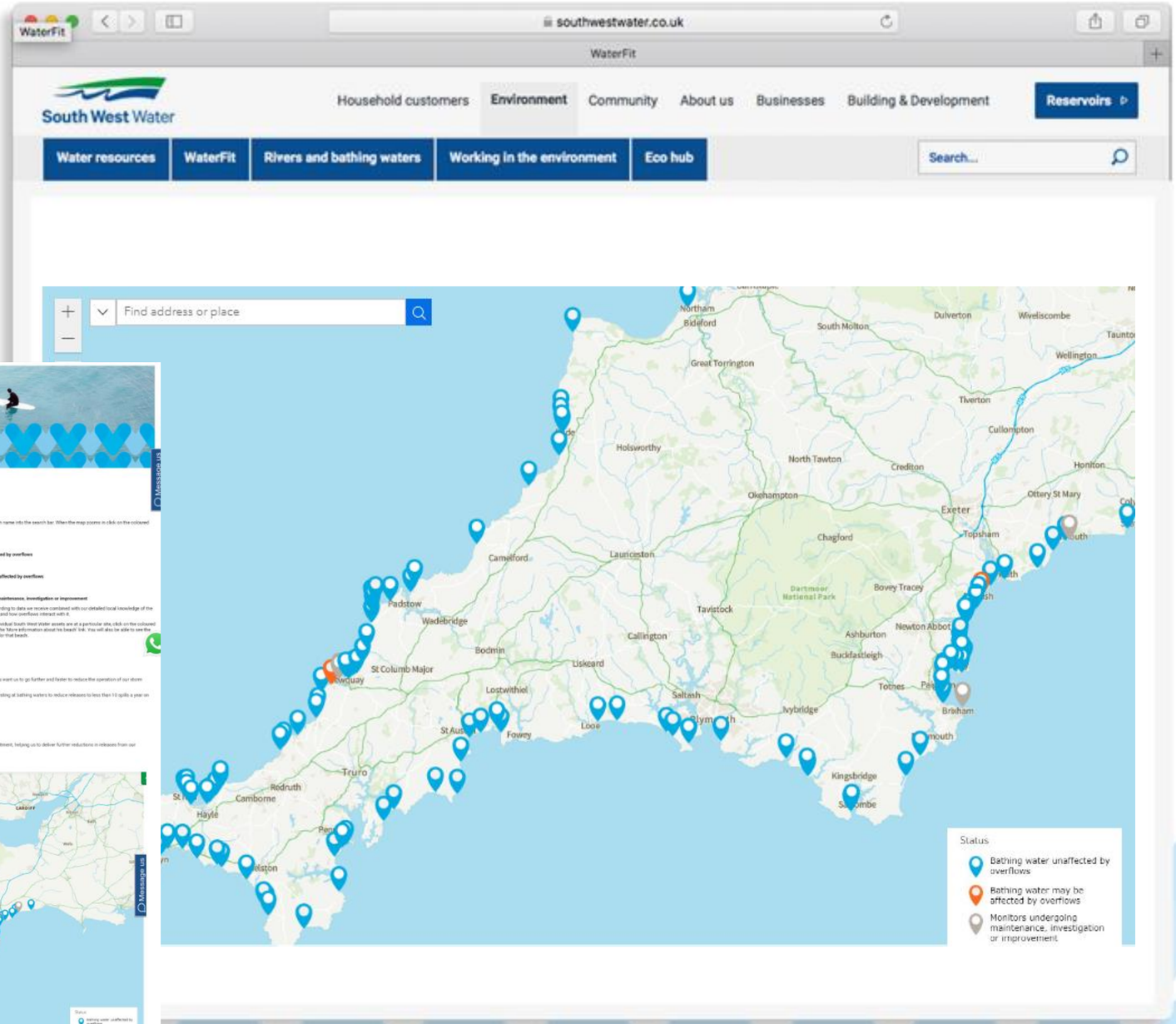


WaterFit

Main map page

- Beach status
- Zoom function
- Search by beach name
- Investment information

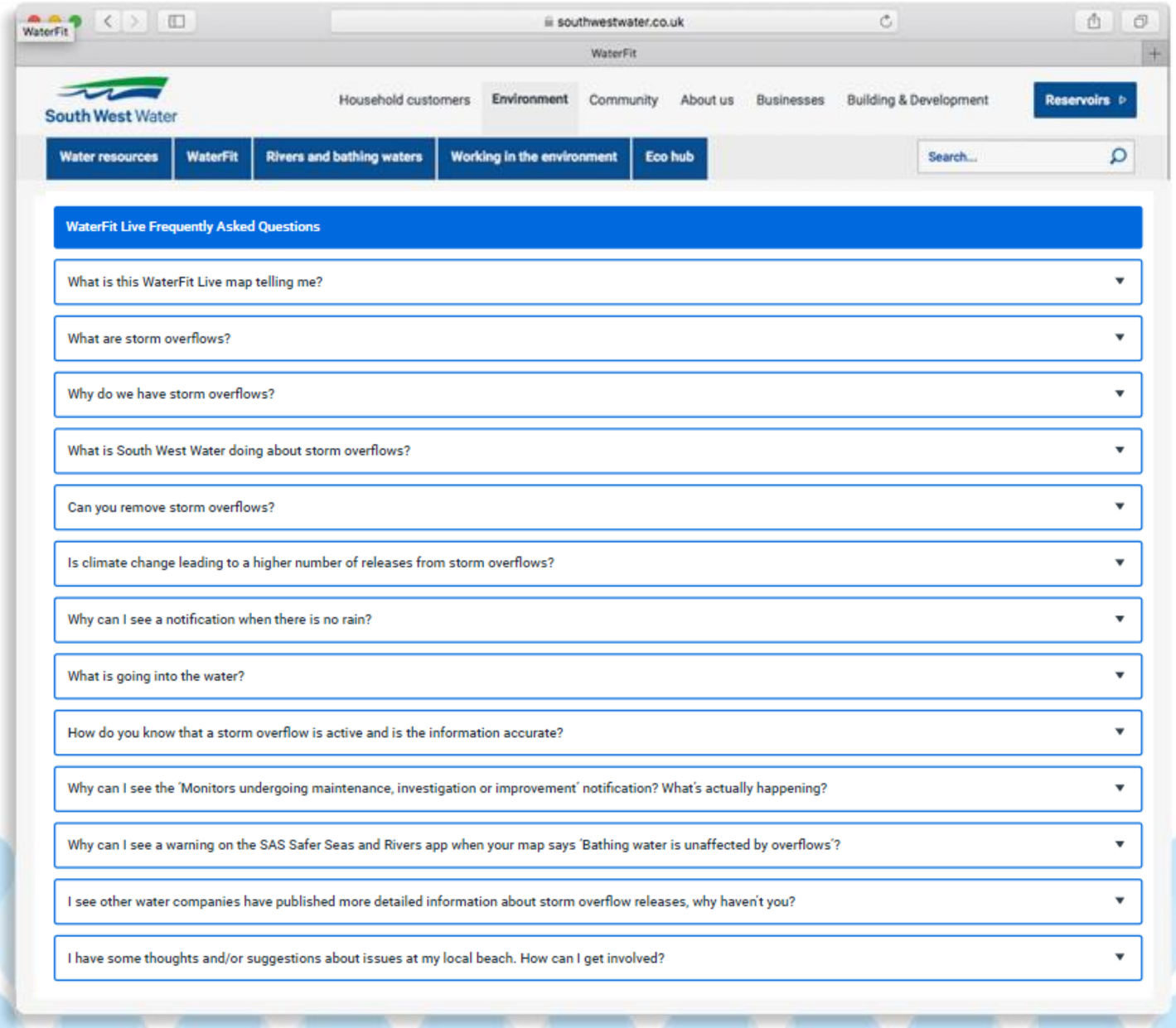




WaterFit

FAQs

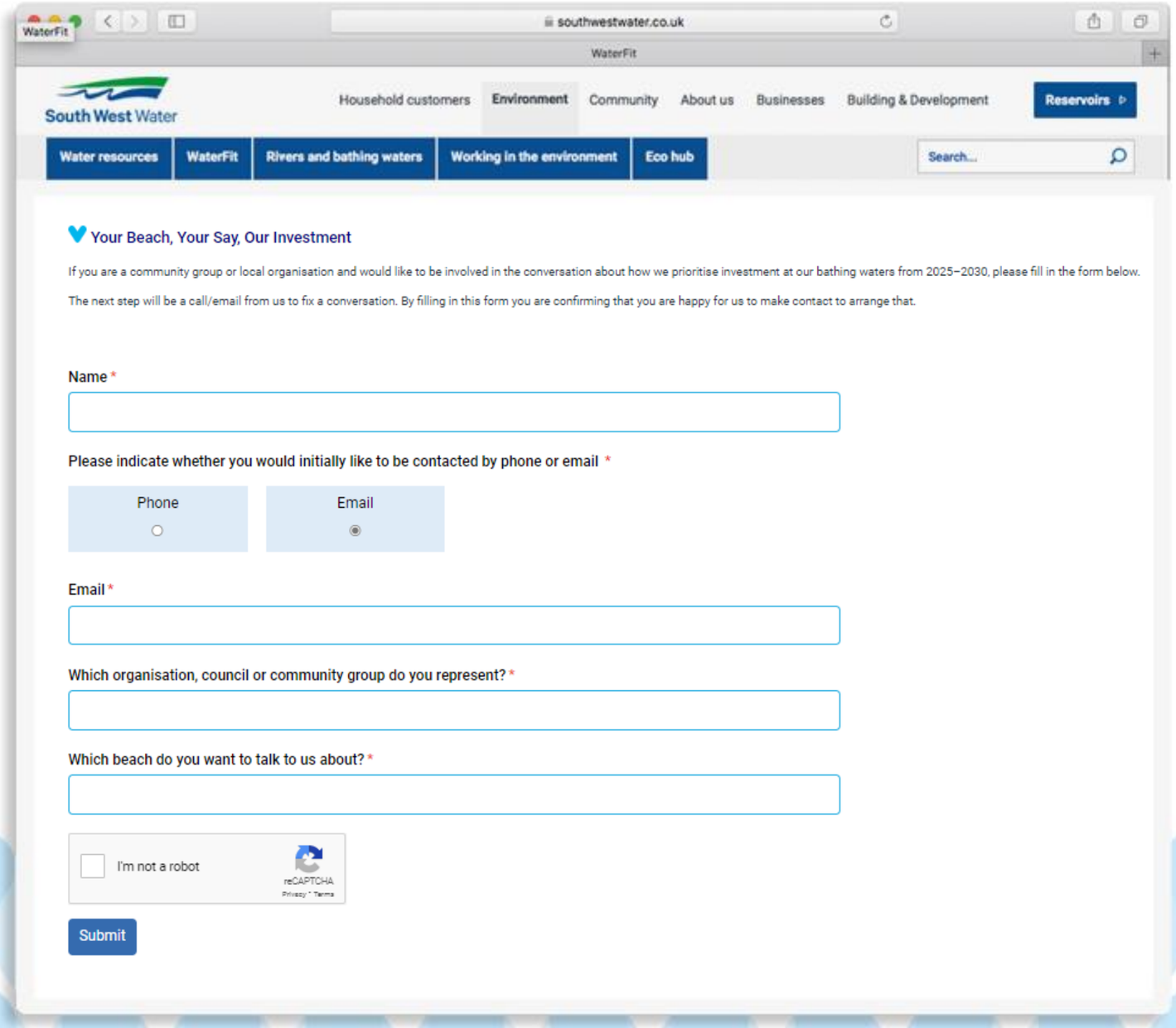
- An opportunity to inform and add context



WaterFit

Peninsula map page

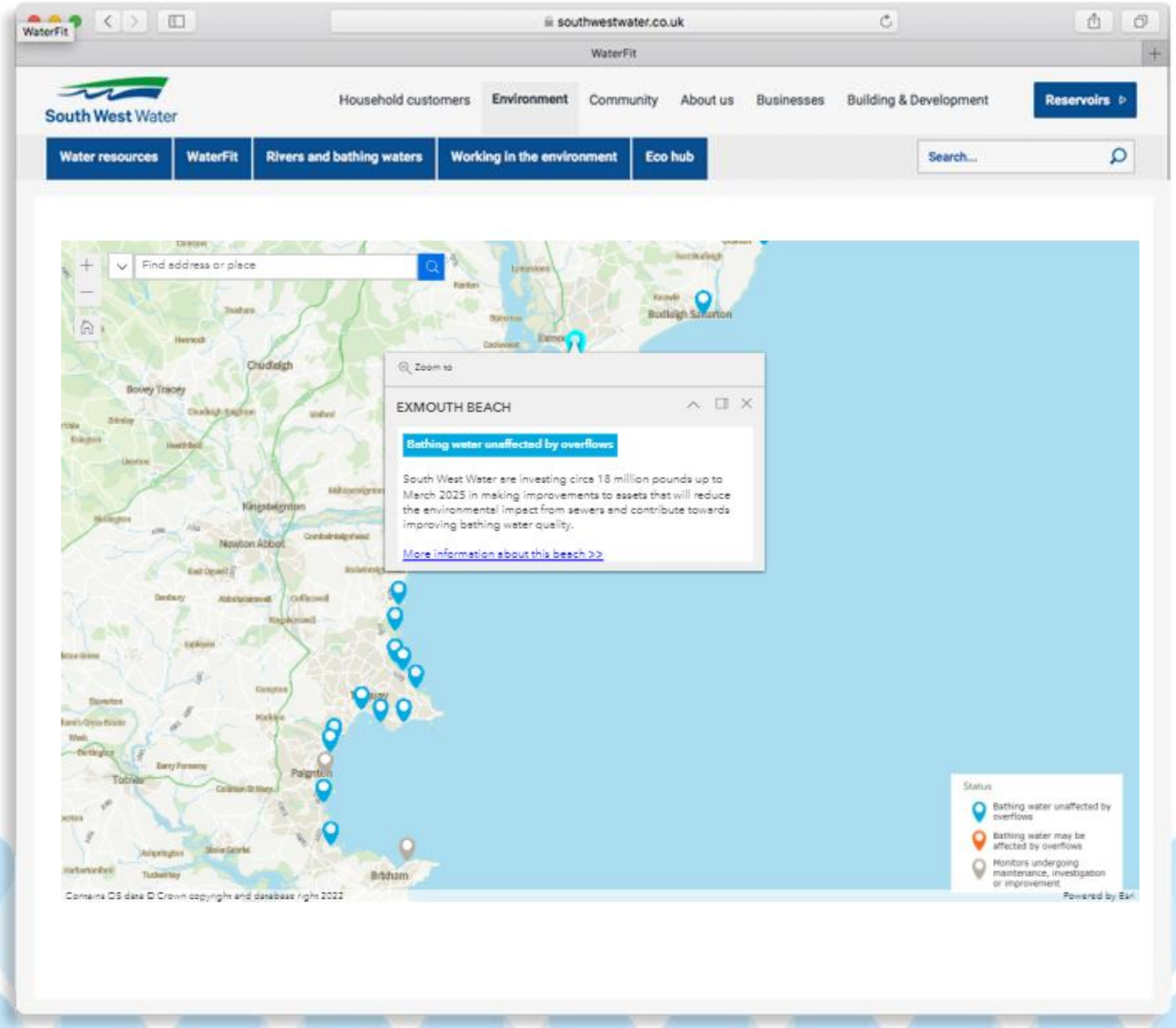
- Your Beach
- Your Say
- Our Investment



WaterFit

Zooming in onto the main map

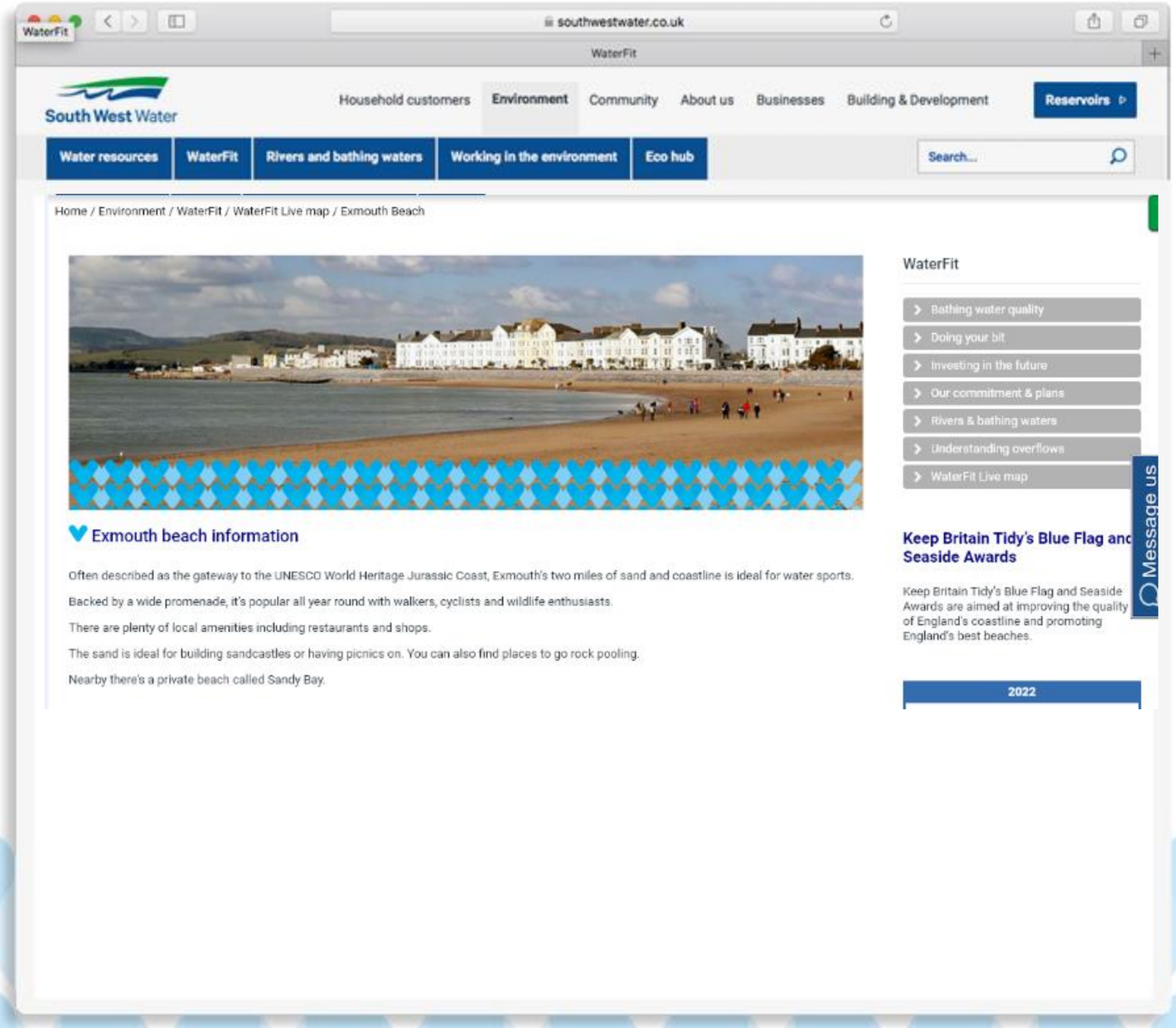
- Headline investment information
- Link to further beach specific information



WaterFit

Specific beach page

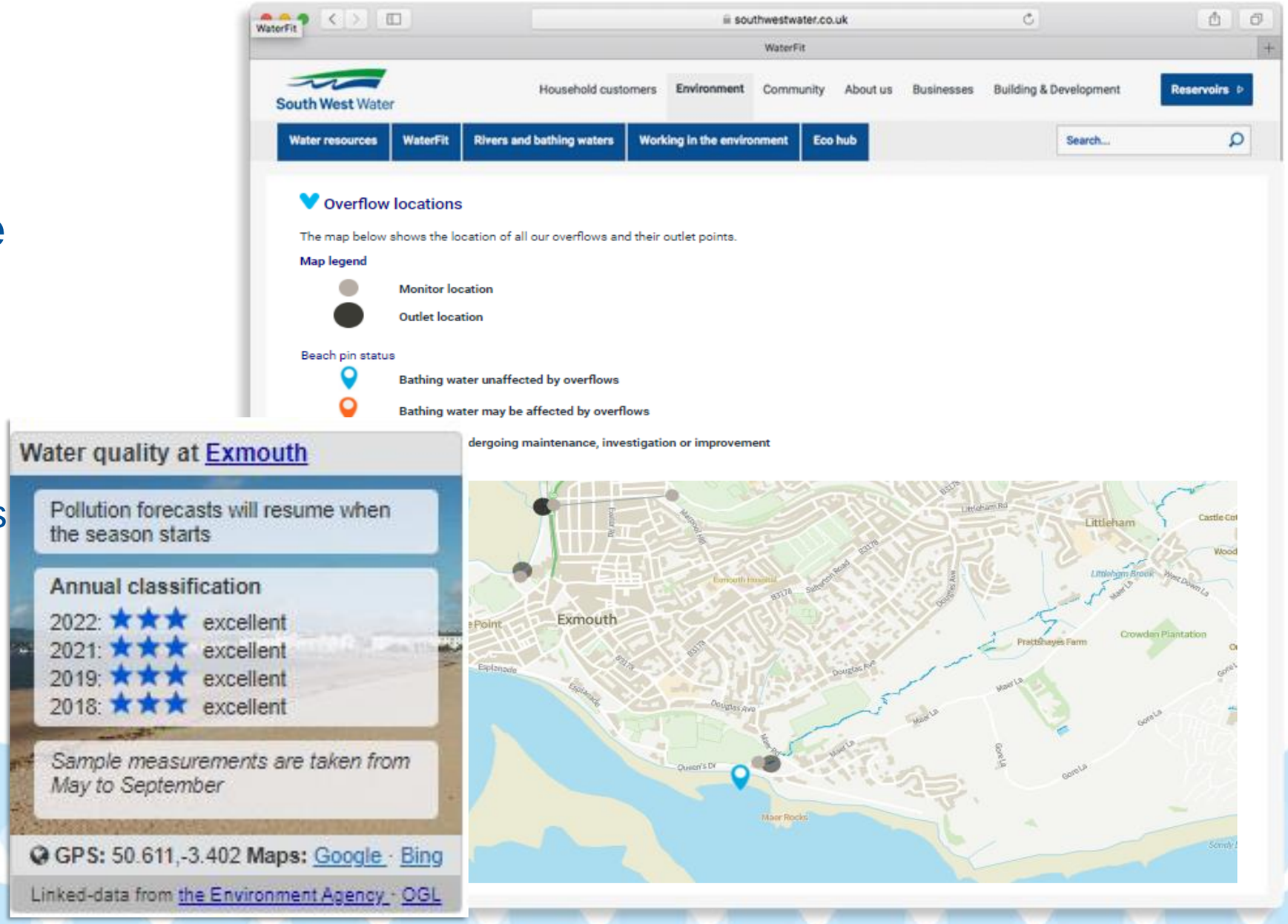
- Information about the beach
- Blue Flag status



WaterFit

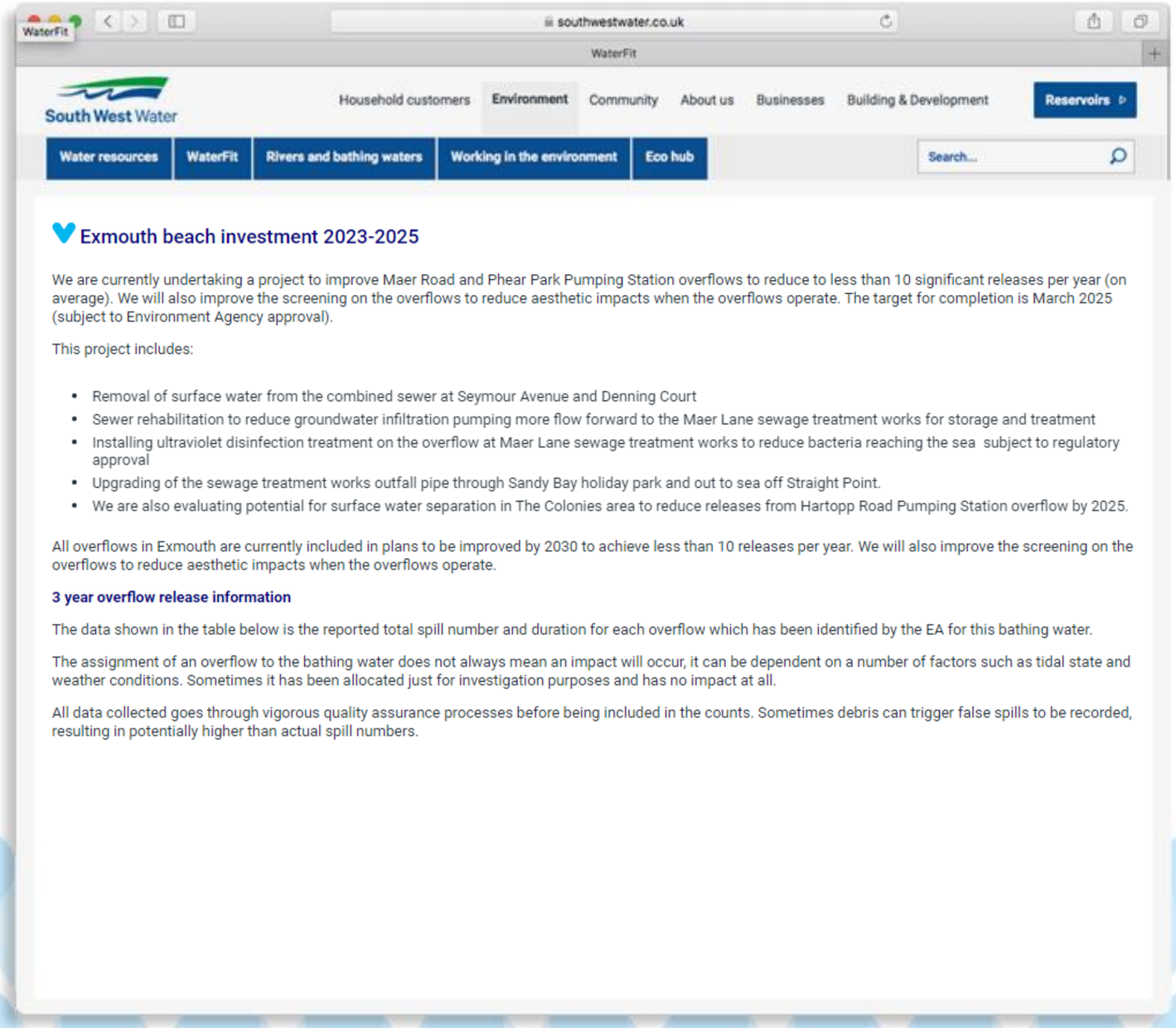
Specific beach page

- Map detailing overflow locations (EDM monitor and outlet)
- Environment Agency Pollution Risk Forecasts
- Annual bathing water classification



Specific beach page

- Beach level investment information
- Reporting of the past 3 years' of overflow release/spill data



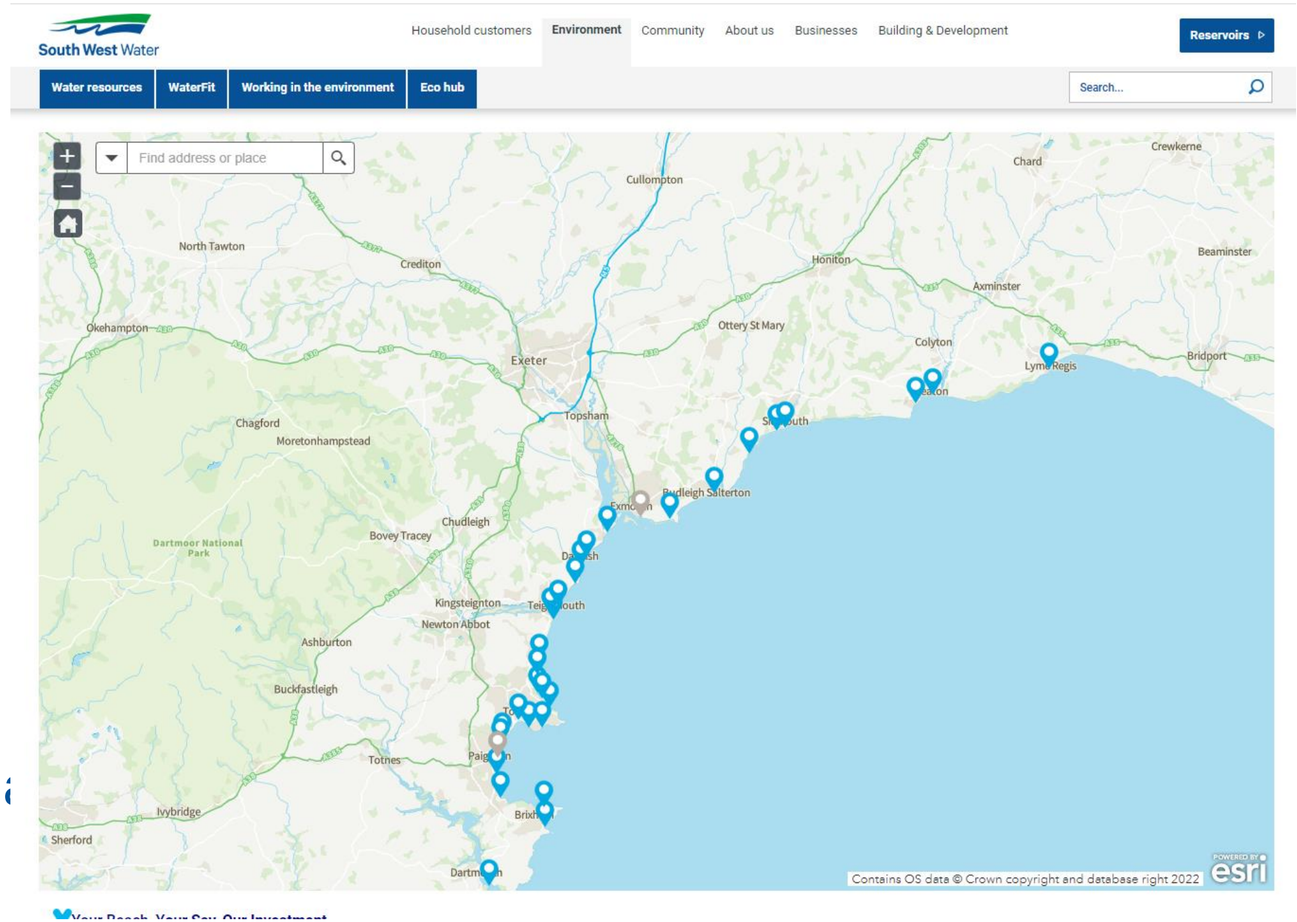
WaterFit

What next: WaterFit roadmap

WaterFit

Next steps: near real time reporting for individual storm overflows

- Provides detailed view of activation of storm overflows
- Each individual activation of monitors will be published
- Will provide more granular information on start a stop times of monitor activation



Discussion

Session Three: Water Resources / Drought

David Harris

Group Director for Drought and Water Resilience

South West Water

Bournemouth Water

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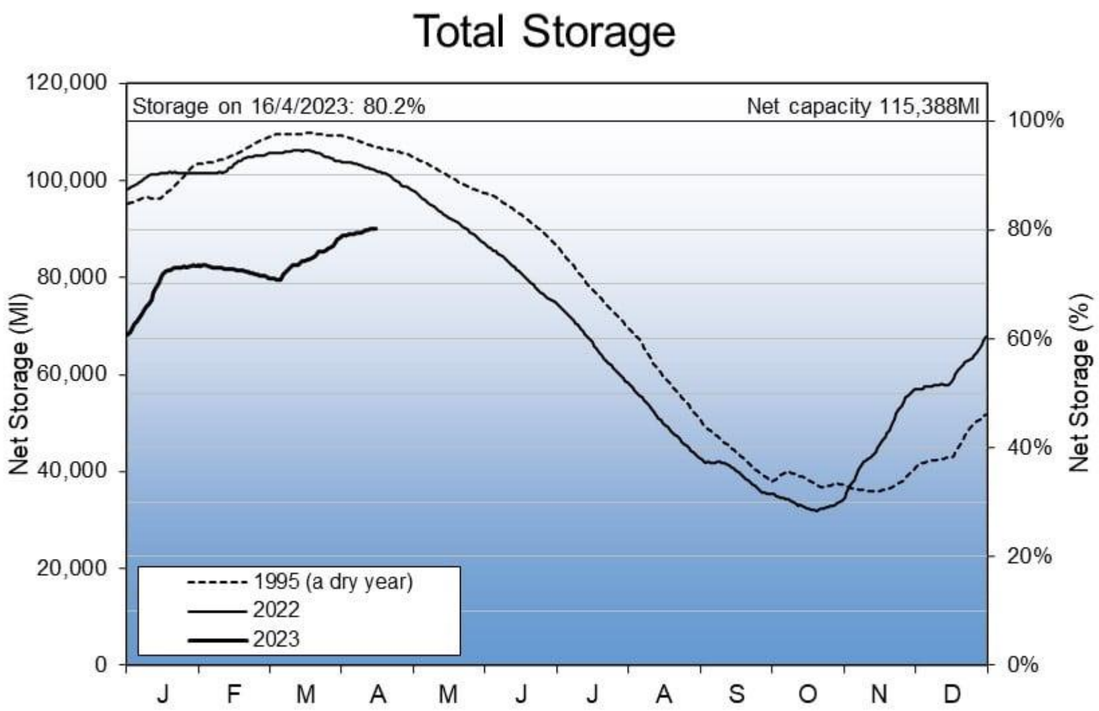
Stakeholder Forum

Let's talk water

Prolonged dry weather



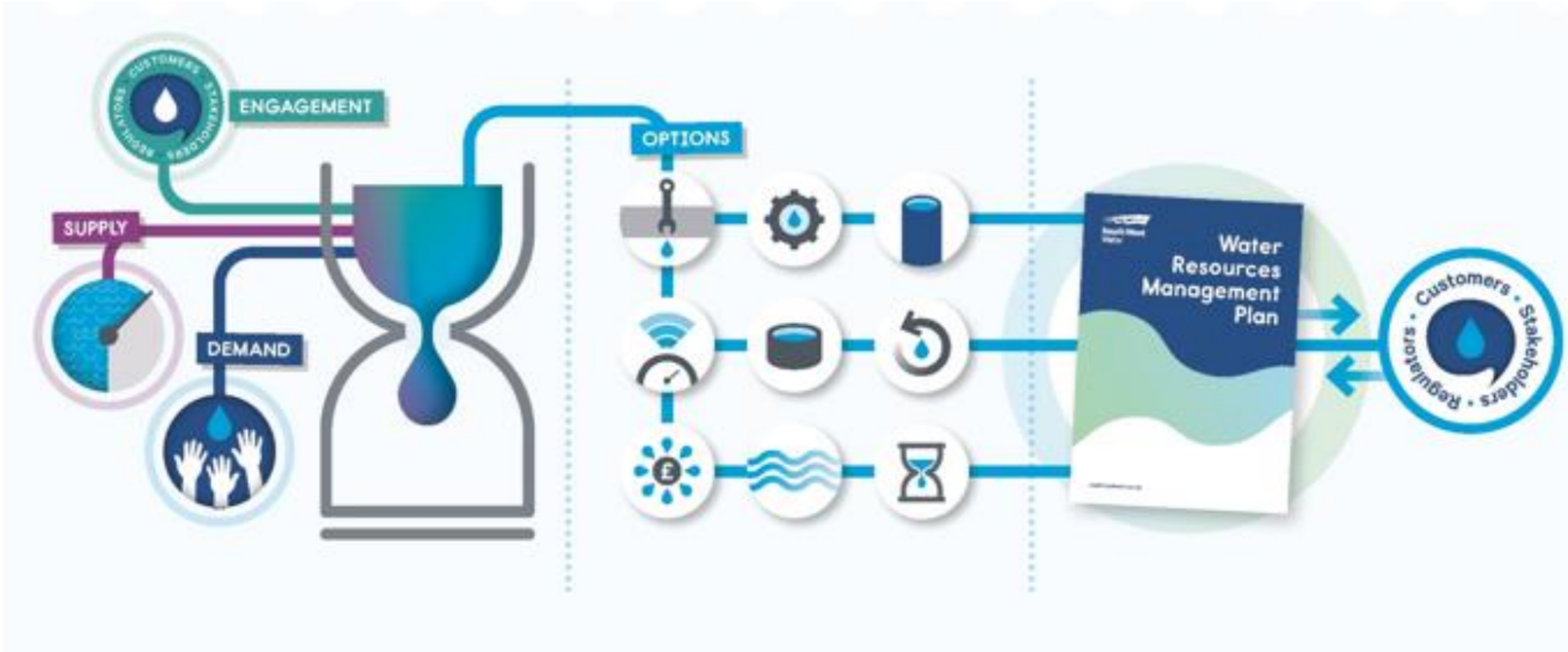
1. Safely taking spare water

2. Identifying and securing new sources of water

3. Detecting and fixing leaks

1. Increased capacity of existing leak detective team
2. Created leak taskforce
3. Sniffer dogs

4. Water Resources Management Plan



We are committed to -

- Finding out what matters most to our customers
- Looking for solutions that work with nature
- Being proactive by planning for the future
- Spending money wisely to balance cost against risk to the environment
- Using the best available evidence to make decisions

Water Resources Management

Demand-reduction solutions

It is vital that we deliver solutions that reduce demand for water.

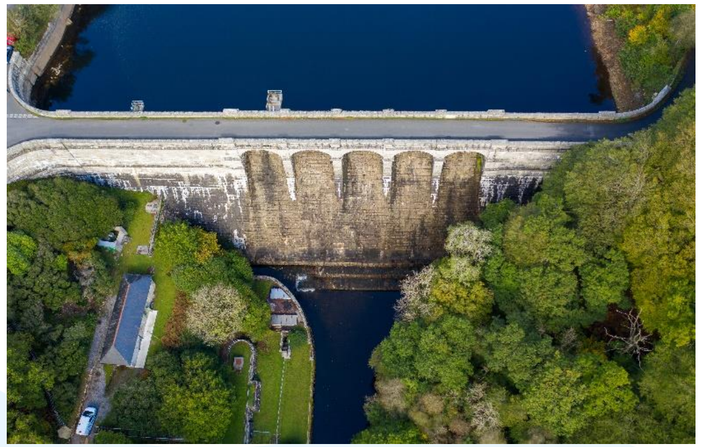
- Preventing and fixing leaks
- Installing smart meters
- Promoting water efficiency: households and non-households

Water Resources Management

Solutions that increase supply

It is also vital to deliver solutions that increase the supply of water.

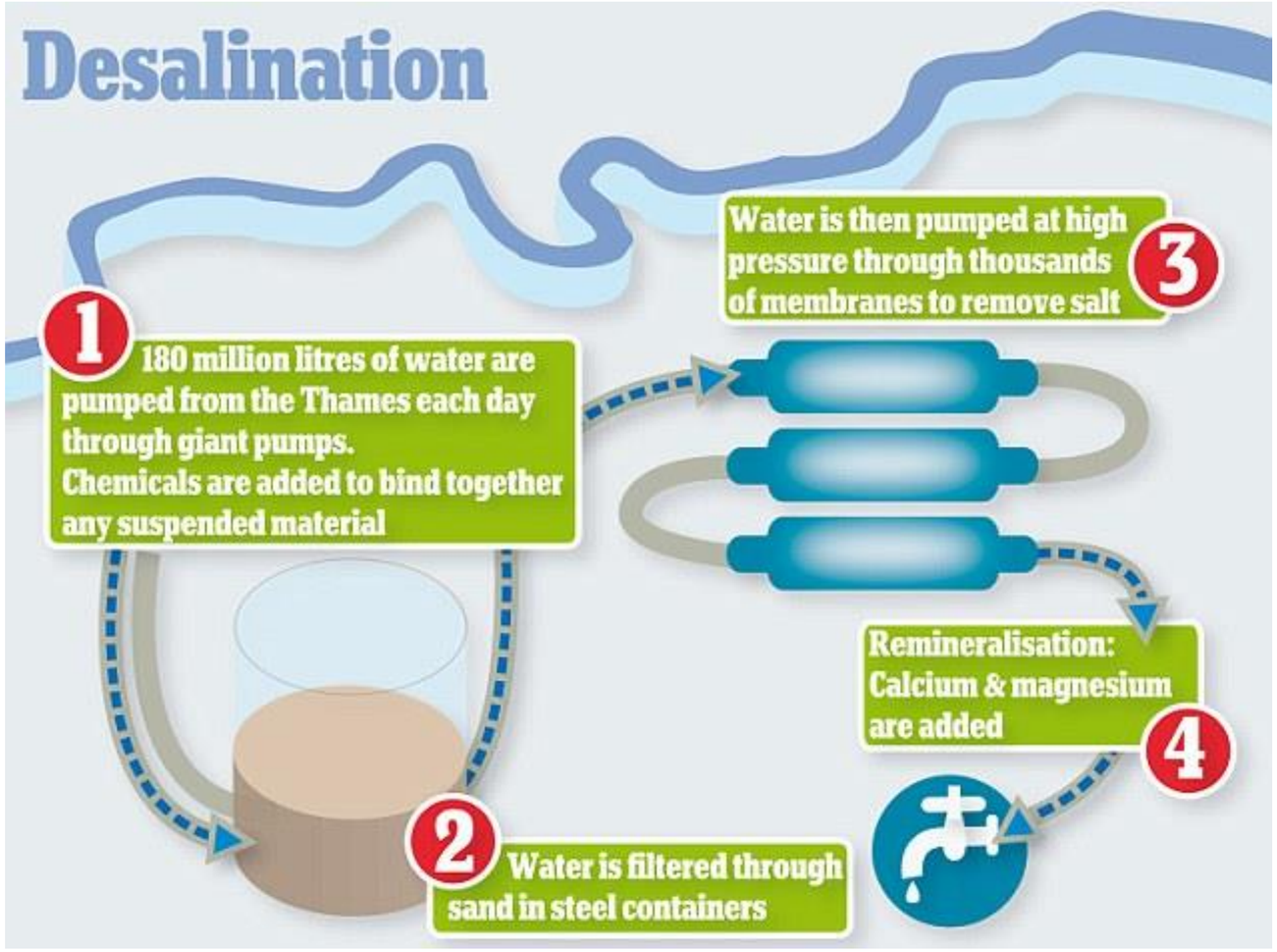
- **Storing more surplus water**
- **Using river water wisely:** location and level of abstraction
- **Increased sustainable use of groundwater**
- **Recycling or re-using wastewater**
- **Balancing the flow of water:** timing, capacity, connectivity
- **New sources of water:** quarries, desalination,



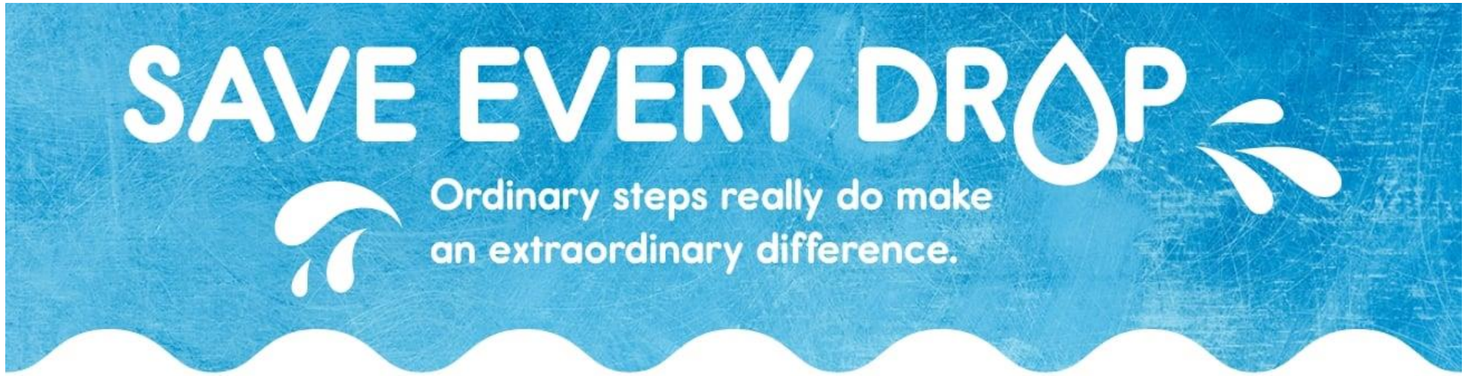
4. Water Resources Management Plan

- Consultation closes 9 May
- https://www.southwestwater.co.uk/environment/water-resources/water-resources-management-plan/

5. Desalination



6. Save Every Drop



FREE water-efficiency audits

FREE Water-efficiency audits

Take advantage of our audits that help identify areas where you could become more efficient every day. FREE devices, FREE fixes and FREE advice all in one.

Find out more ▶

FREE Leaky loo repairs

Got a leaky loo? Even a small leak can add up to a huge amount of unnecessary consumption. Get it fixed for FREE and get your bills down.

Let us know ▶

FREE Supply pipe find and fix

Suspect you have a leak on your supply pipe? Usually, they're the responsibility of the landowner, but we're offering to find and fix some of these suspected leaks for FREE.

Report your leak ▶

Holiday Park Water audits/Flow moderators

Specifically for holiday-company-owned static vans and lodges across Cornwall, we're offering flow moderators for FREE (including fitting). Easily save water and money with a simple install!

Find out more ▶

Discussion

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Session Four: Our PR 24 Business Plan

Michelle Davies

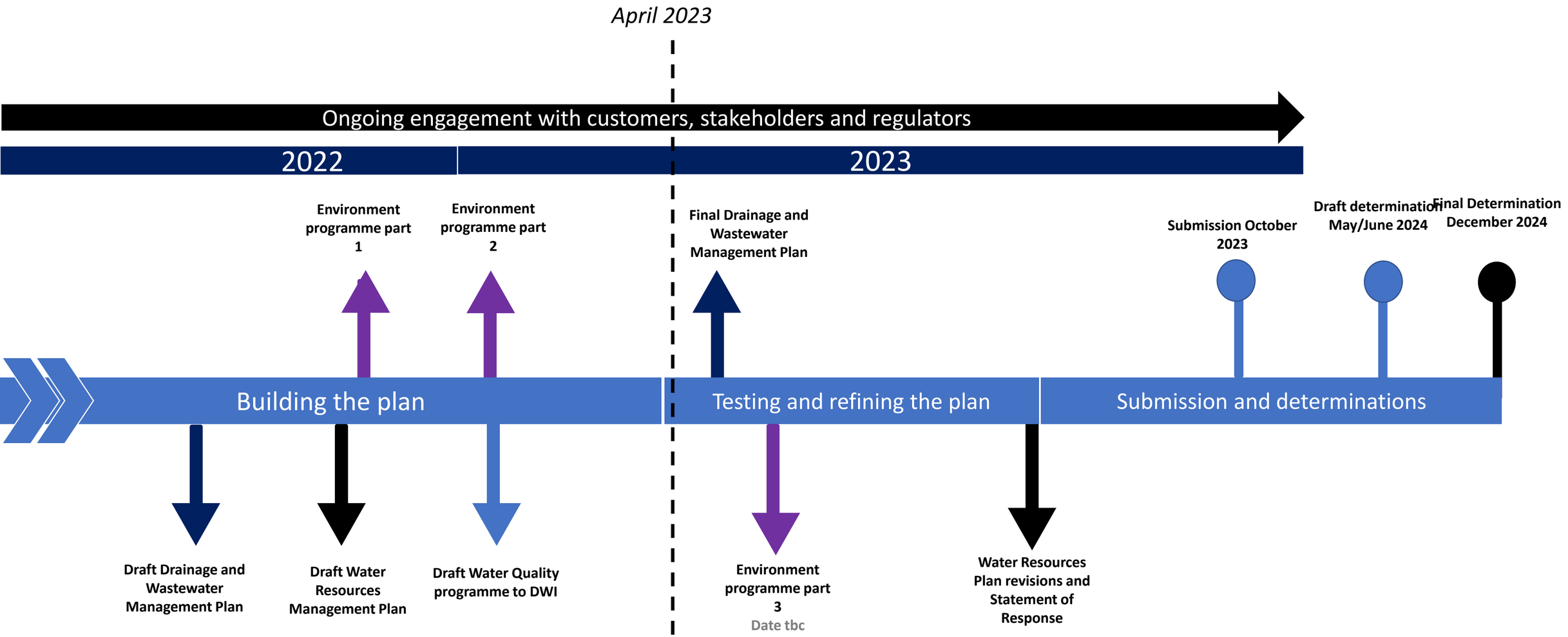
Head of Strategy

South West Water

Bournemouth Water

BRISTOL WATER

The PR24 business plan process



Context for our plan

Climate change impacts

- Warmer, drier summers and wetter winters predicted
- More frequent droughts and floods
- Adapting to climate change
- Net zero

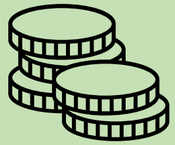
Population changes

- Meeting infrastructure needs for new housing in the area
- Population swell during holiday periods from tourists visiting our beautiful area

New statutory requirements

- Reducing the use of storm overflows
- Reducing water used per head
- River water quality monitoring
- Improving drought resilience
- Nutrient removal

Economic factors



- Cost of living crisis and affordability of bills
- Inflation

Current view of plan

This is an early view which may change significantly before submission – due to ongoing discussions with regulators (and government) and in response to feedback from customers and stakeholders.

Our current view of the investment plan is a 3bn+ plan, which is over two times our 2025-2030 plan.

Current average annual household bill	**£476**
Initial view of annual average household bill by 2030 **after proposed plan** (before inflation)	**£570 -£700**

What our plan delivers

Our 2050 ambition	How our 2025-2030 plan contributes to this ambition	Key metrics	Bill increase (combined water and wastewater average bill)
Resilient water supplies	We aim to reduce the amount of water we take from rivers by reducing leakage from pipes and helping customers to reduce their own usage. We will also develop new supplies of water locally and regionally.	• 8 new sources providing 20 million litres per day of additional capacity • 73 million litres of water per day demand reduction through 15% leakage reduction and 7% per capita consumption reduction • 500,000 smart meter installations • Additional resilience: Connecting areas together to give more flexibility on how water is supplied	£25
Top quality drinking water	We will take a source to tap investment approach to ensure that customers continue to receive high quality water that looks, tastes and smells great.	• Catchment management programme expanded to deal with issues at source • 16 water treatment works upgraded to maintain great quality supplies • 200-250km of cast iron distribution main replaced • Up to 50,000 lead pipes replaced	£15
Controlled and managed drainage	We will invest in our sewer network and wastewater treatment processes. We will protect bathing beaches and environmentally important sites as a priority.	• 275 storm overflow sites addressed focussing on ecological sensitive areas, shellfish and bathing water sites • Significant reduction in pollution incidents • Continue to be an industry leader on preventing flooding of properties from sewers	£95
Environmental leaders	We will improve coastal and river water quality. We will increase biodiversity through natural capital solutions, planting trees and restoring peatland. We will invest in renewable energy and reduce our carbon emissions to reach net zero by 2030.	• Improving river and coastal waters - removing harmful nutrients and contaminants from wastewater. • 3% year on year increase from 2020 natural capital baseline • Net zero operational carbon emissions	£13
Trusted customer and community experiences	We want customers and communities to have a great experience every time they interact with us. By improving our performance and being transparent and open, we will increase the level of trust which everyone has in us.	• Zero water poverty, supporting additional customers through social tariffs • Progressive charges implementation for fair and affordable bills	£10

Emerging view for testing and refinement

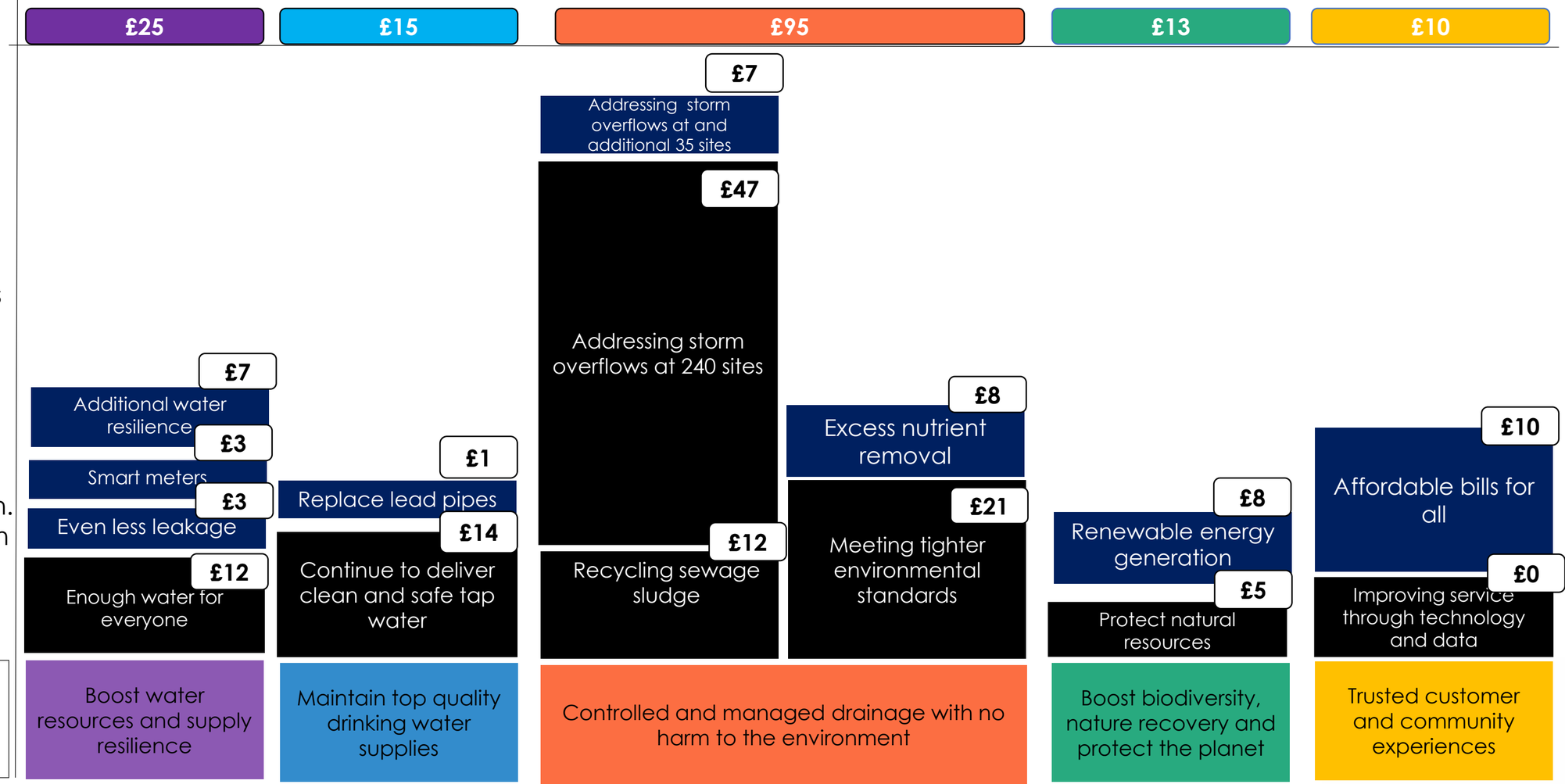
Key drivers of bill increases and the choices within our plan

Must do investments where there is little flexibility in when or how they are delivered. These investments deliver our 'must do' (least cost) business plan.

Choices within our plan. There is flexibility in when these investments are delivered as they do not have to be delivered by 2030.

We would like to include these in the business plan to meet longer term legal requirements and to progress towards our 2050 ambition. There is the option to go faster (with higher bills by 2030) or slower (with lower bills by 2030)

Big caveat: This is an early view which may change significantly before submission



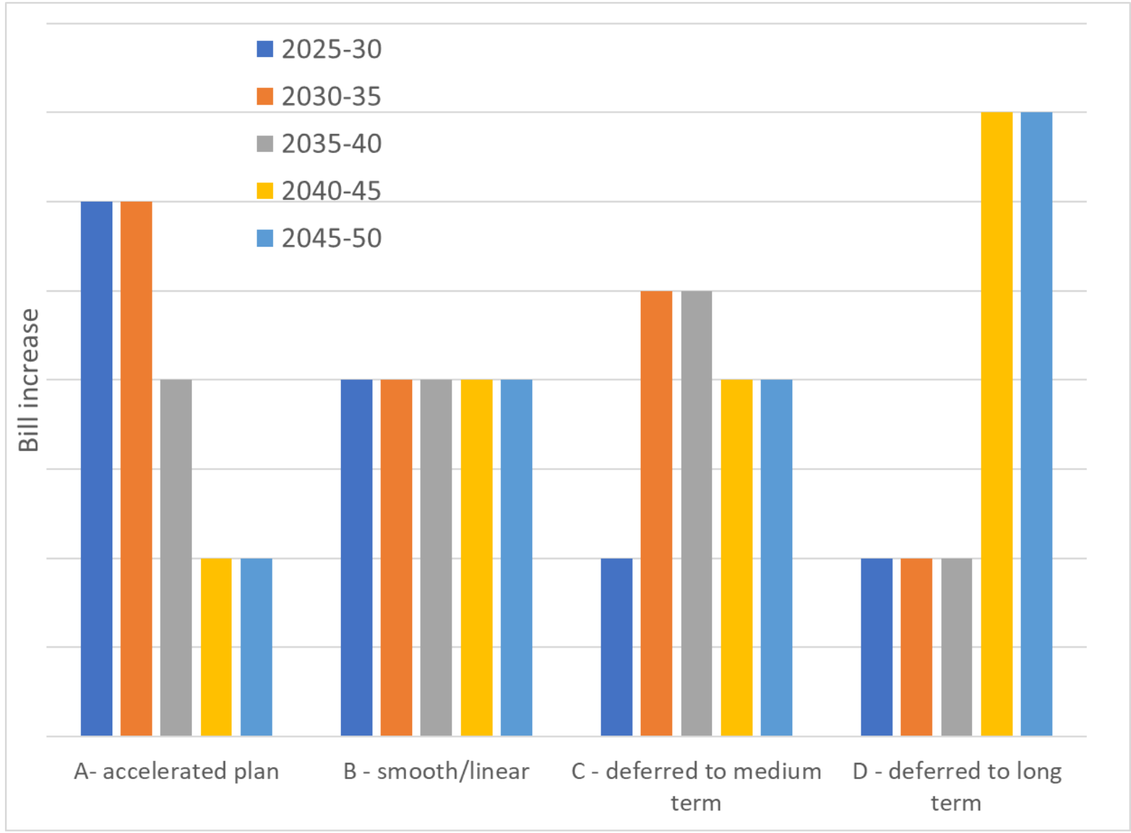
Long term ambitions

Phasing of delivery and bill increases

Further bill increases are required between 2030 and 2050 to meet legal requirements and progress towards longer term goals. These impact the blue boxes on the previous slide.

Choices for delivery profile to 2025 are:

1. **Accelerated** with service improvements achieved earlier
2. **Linear** with service improvements achieved equally year on year
3. **Deferred to medium term (post 2035)** with service improvements achieved later
4. **Deferred to the long term (post 2040)** with service improvement achieved much later



Discussion

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How would you like us to phase the choices with our plan?

Affordable bills for all	54%
Renewable energy generation	61%
Excess nutrient removal	61%
Addressing an additional 35 storm overflows	67%
Replacing lead pipes	52%
Even less leakage	67%
Smart meters	39%
Additional water resilience	70%

Next steps

Another opportunity to have your say on our plan!

Virtual meeting
24 May, 6pm – 7.30pm

We would love to see as many of you there as possible – please register via our website

Feedback form