



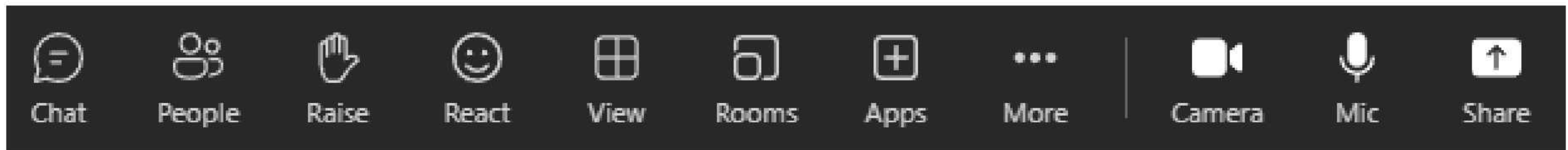
Welcome

- The meeting will begin shortly
- Please keep your microphone muted
- We encourage you to keep your camera on.

Housekeeping



- **The meeting is being recorded** for note-taking purposes only
- The presentation will be available at www.seswater.co.uk soon after the meeting
- A written record of the meeting will be available within 21 days
- **Please keep your microphone on mute**, unless you have been asked to speak to pose a question (using the mic icon)
- **Please keep your camera on**, if you're comfortable to do so and have a good connection (using the camera icon)
- **If you would like to ask a question, or make a comment, please either:**
 - **Raise your virtual hand** (using the hand icon)
 - **Type your question or comment into the meeting chat** (via the speech bubble icon)
 - You can submit questions **up to 24 hours** after this meeting ends
- **Option of turning on live subtitles / captions** via the options included under 'More'
- Email events@seswater.co.uk or alert us via the chat for any technical issues you may have.



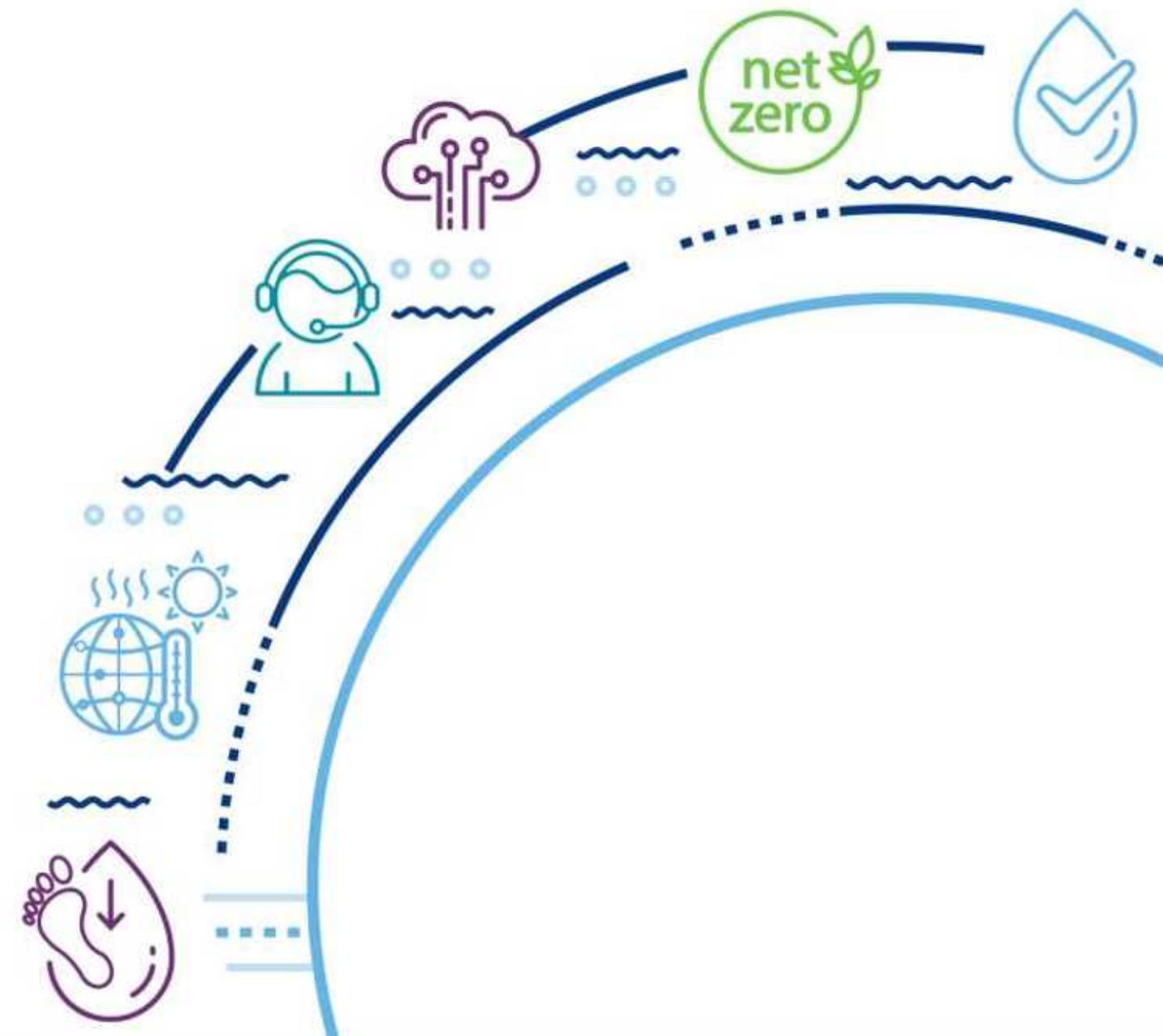


Meeting agenda

- **6pm:** Welcome & Meeting introduction
- **6.10pm:** SES Water presentation on its business plan for 2025 to 2030
- **6.25pm:** Your questions and comments, divided into the following themes:
 - Customer service priorities
 - Long-term outcomes
 - How SES Water's five-year plan delivers the first part of their long-term strategy
 - Environmental outcomes
 - Affordability
 - Other issues not covered already.
- **7.55pm:** Next steps and close of meeting.

Your water, your say

SES Water business plan 2025 to 2030



Today you'll hear from



Ian Cain
Chief Executive



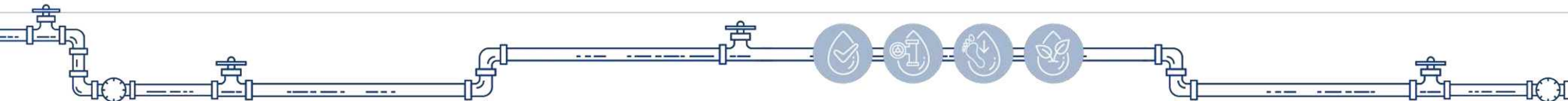
Paul Kerr
Chief Financial Officer



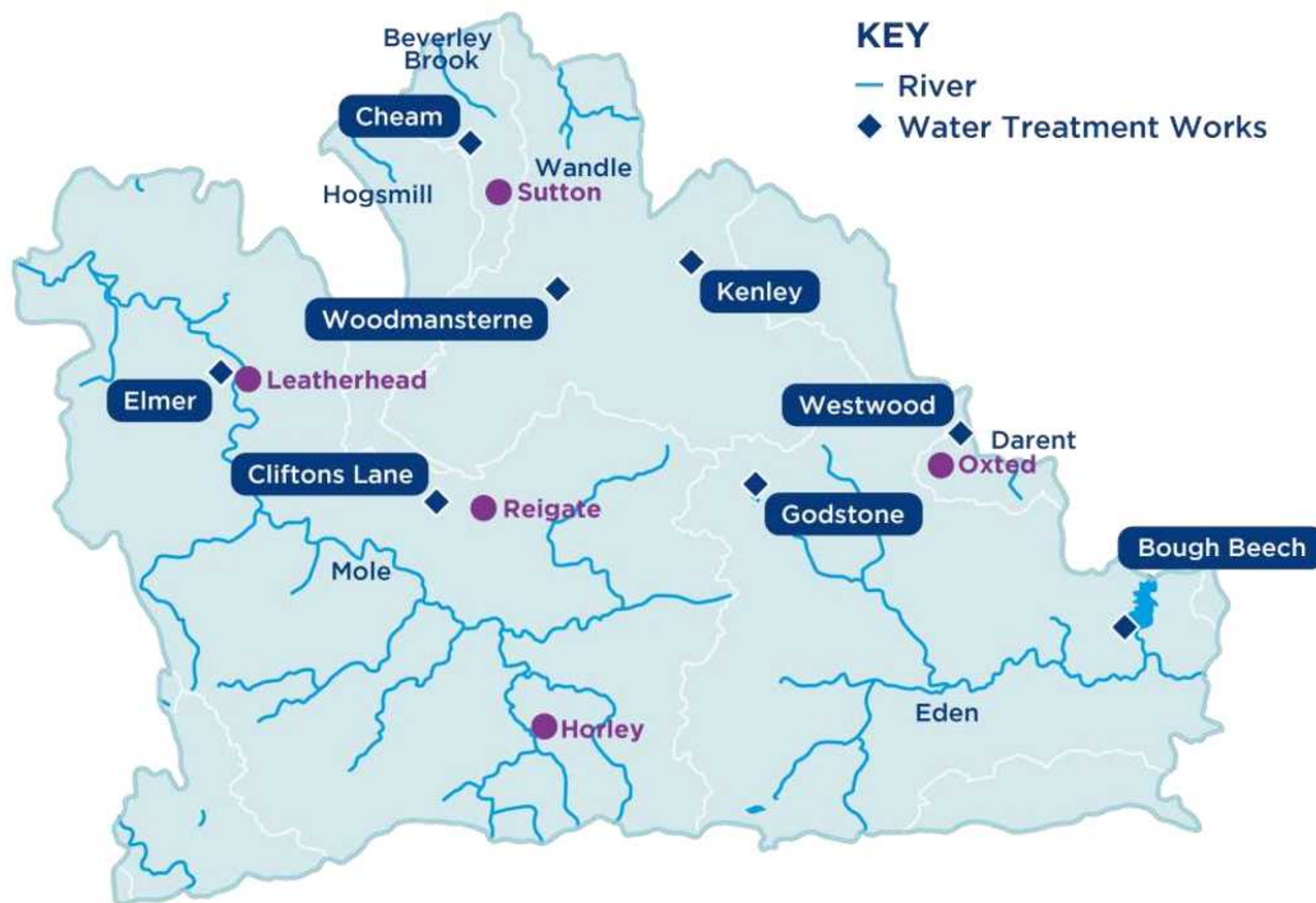
Kate Thornton
Chief Customer Officer



Tom Kelly
Wholesale Director

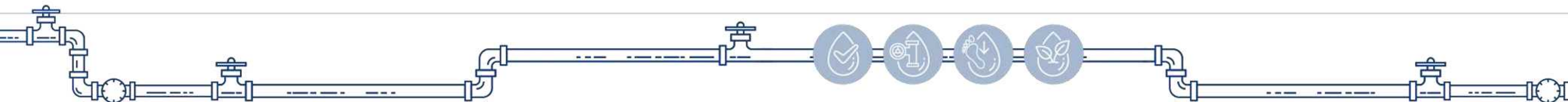


Our supply area



Key facts

- We supply 160 million litres of drinking water to 750,000 customers every day
- 85% of our water comes from underground sources beneath the North Downs
- 15% comes from the River Eden and is stored in Bough Beech reservoir
- Most receive wastewater services from Thames Water (we bill you on their behalf); the rest are served by Southern Water
- We have smart technology across 100% of our underground pipe network.



How we are performing today

Performance commitment (PC)	Current performance against our target	Current performance against industry average
Water quality compliance (CRI index)		
Customer contacts about water quality		
Supply interruptions over 3 hours		
Water softening		N/A - we are the only company to soften water
Mains repairs		
Leakage		
Water consumption (per capita consumption)		
Pollution incidents		We are the only water only company with pollution PC
Water treatment works unplanned outage		
Greenhouse gas emissions		No direct industry comparison
Customer satisfaction (C-MeX score)		
Developer satisfaction (D-MeX score)*		

Key:

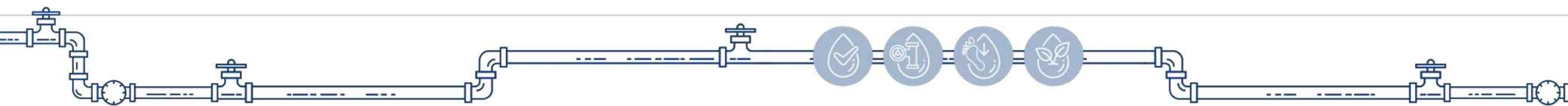
Current performance against our target

- at or exceeding our target
- behind our target

Current performance against industry average

- better than industry average
- worse than industry average

*Most performance improvement in the industry



Understanding our customers' priorities



We carried out our largest programme of customer research and engagement with more than 4,000 customers

Feedback from day-to-day calls and interactions

Customer focus groups

Online surveys and research

Being active in the community and attending local events

Your water, your say session 1

Input from customer and environmental experts

Improve water quality at source and avoid using extra chemicals

High quality tap water is your highest priority

You're worried about bill rises

You'd like us to replace more lead pipes

We need to do much more to reduce leaks

We should do more to enhance our local environment, particularly chalk streams

You want us to take a steady approach to reducing our carbon emissions

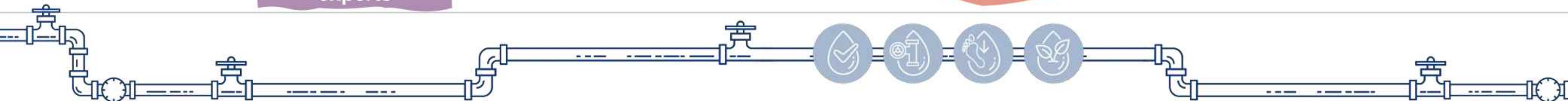
Smart meters are a concern – you're not sure they'll work or if your data is safe

Our service must be reliable even as the climate changes

We need to help people manage their water use

Some people are concerned about water pressure and hardness

You've asked about our ownership and shareholder dividends



Our 2025 to 2030 business plan

The feedback we received, along with government and regulator expectations, is reflected in four priorities which our 2025 - 2030 business plan will deliver, moving us towards our long-term ambitions.



High quality water from sustainable sources

- Continue to supply high-quality water that always meets the highest standards
- Reduce customer contacts about the taste, smell and odour of their water
- Eliminate high-risk lead pipes.



A resilient water supply from source to tap



- Reduce leakage by 26% by 2030 and 62% by 2050*
- Drive down mains repairs, halving them by 2050*
- Reduce supply interruptions and unplanned outages, eliminating interruptions longer than three hours by 2050.

*Compared to 2019/20



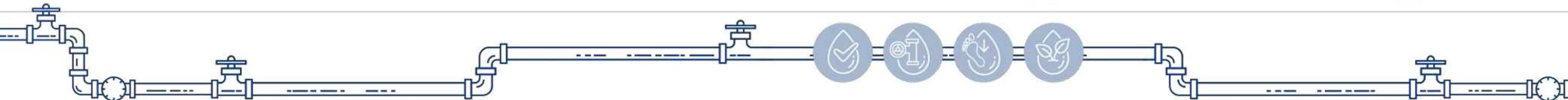
Reducing your water footprint and charging a fair price

- Reduce household water consumption by 11% by 2030, to 110 litres per person per day in 2050
- Deepen customer engagement and increase satisfaction
- Eliminate water poverty.

Improving the environment and having a positive impact



- Work in partnership to improve the environment
- Increase biodiversity across 80% of our land and across other parts of our region
- Lower carbon emissions - reaching net zero carbon by 2050
- Comply with all our environmental obligations.

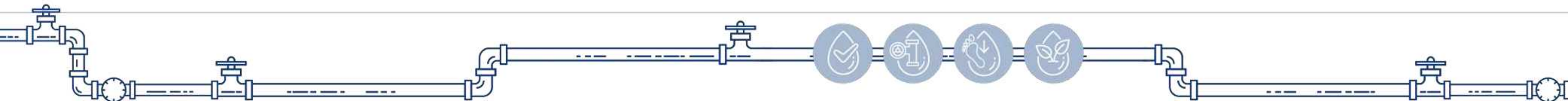


You said:

High-quality drinking water is your top priority. You want us to work with land users to protect water quality at source and avoid using extra chemicals and support us replacing lead supply pipes at schools, colleges and nurseries.

We will:

- Fully refurbish our Kenley water treatment works and upgrade our softening facilities
- Add UV treatment at two sites to protect water quality
- Work with farmers and land users to help keep water sources free from pesticides and nitrates
- Replace lead supply pipes at 170 nurseries, schools and colleges to eliminate lead in these premises
- Investigate if we need to reduce how much water we take from the environment and work in partnership to improve our chalk streams.

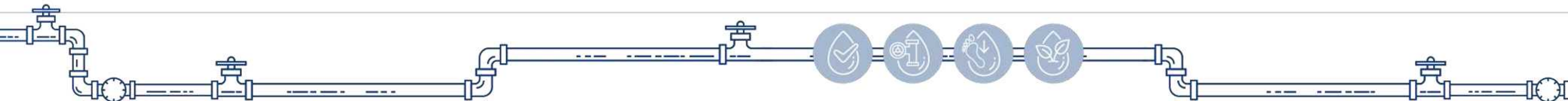


You said:

You expect reliable water supplies and don't want your usage restricted. You expect us to go further to reduce leaks and exceed the Government target.

We will:

- Expand our smart network to help us find and fix even smaller and harder to detect leaks
- Find leaks on your supply pipes and help you fix them
- Use new technology to test the condition of our water mains and prioritise those which need replacing
- Optimise the pressure in our mains so less water is leaked and water pressure is more stable
- Invest in our water supply sites to protect them against power outages and make them more secure
- Install smart technology at all our sites so we detect issues more quickly
- Reduce the risk of flooding on the River Mole to protect our Leatherhead site and the surrounding area.





Reducing your water footprint and charging a fair price

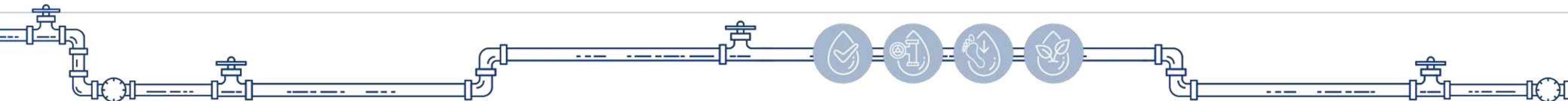


You said:

You understand why it's important to save water, but want us to support you to do so, and expect us to cut leakage first. You have concerns about smart metering, and we need to protect people with financial difficulties.

We will:

- Roll out smart meters to all households and businesses alongside new digital technology to help you manage your water use, improve the service you receive and provide targeted advice to help you save water
- Invest in extra cyber security measures to keep everyone's data safe
- Work with customers to design new tariffs that incentivise using less, supported by free water-saving products and home visits
- Double the number of pupils that take part in our education programme
- Support 25,000 people with our social tariff
- Work with community partners to provide extra support to customers that need it



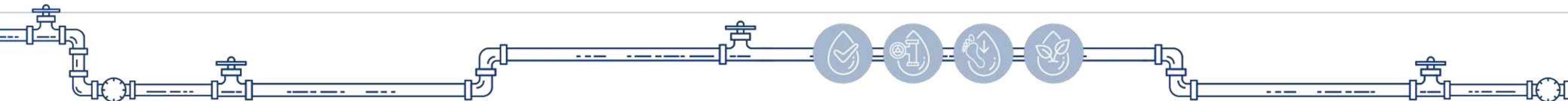
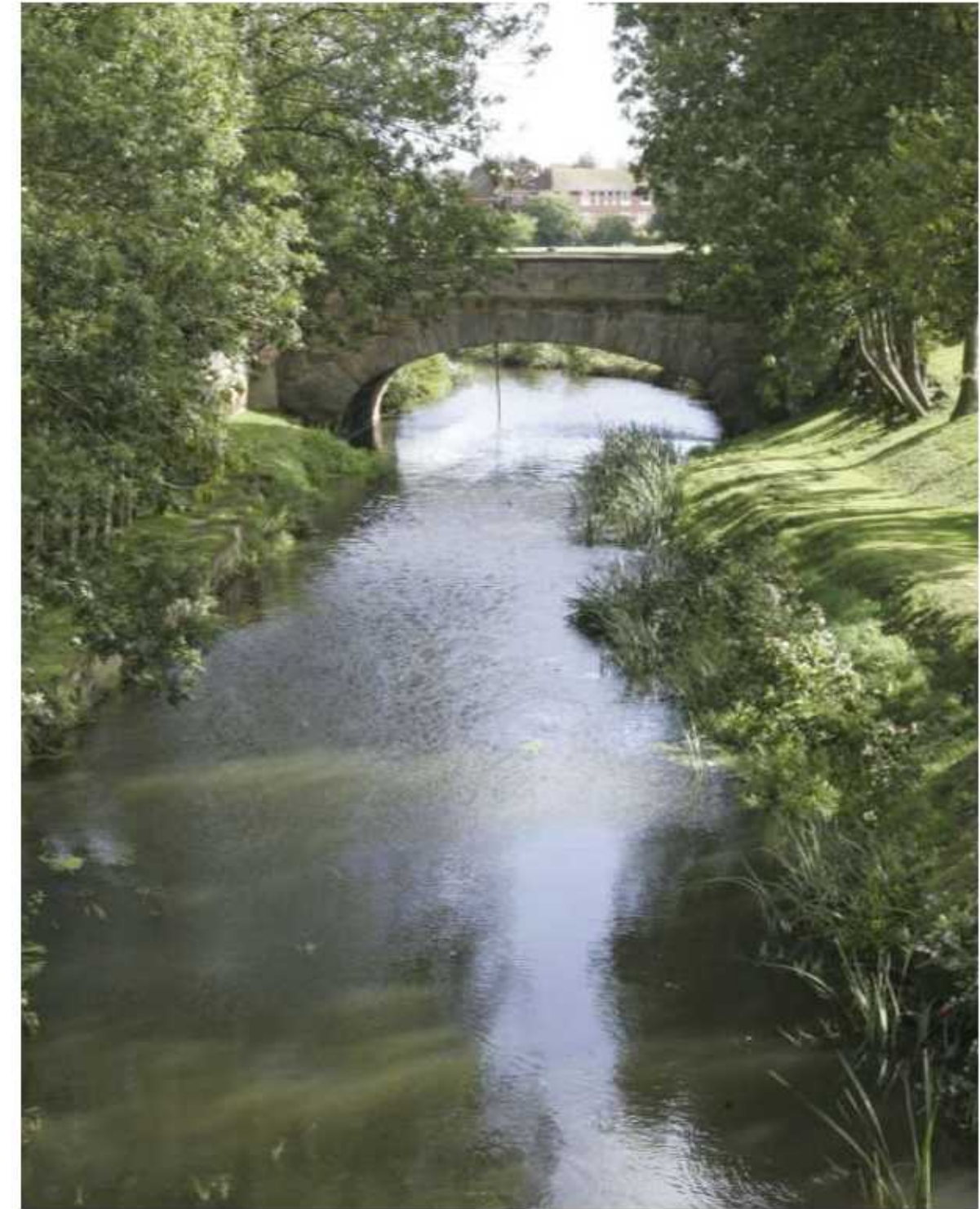


You said:

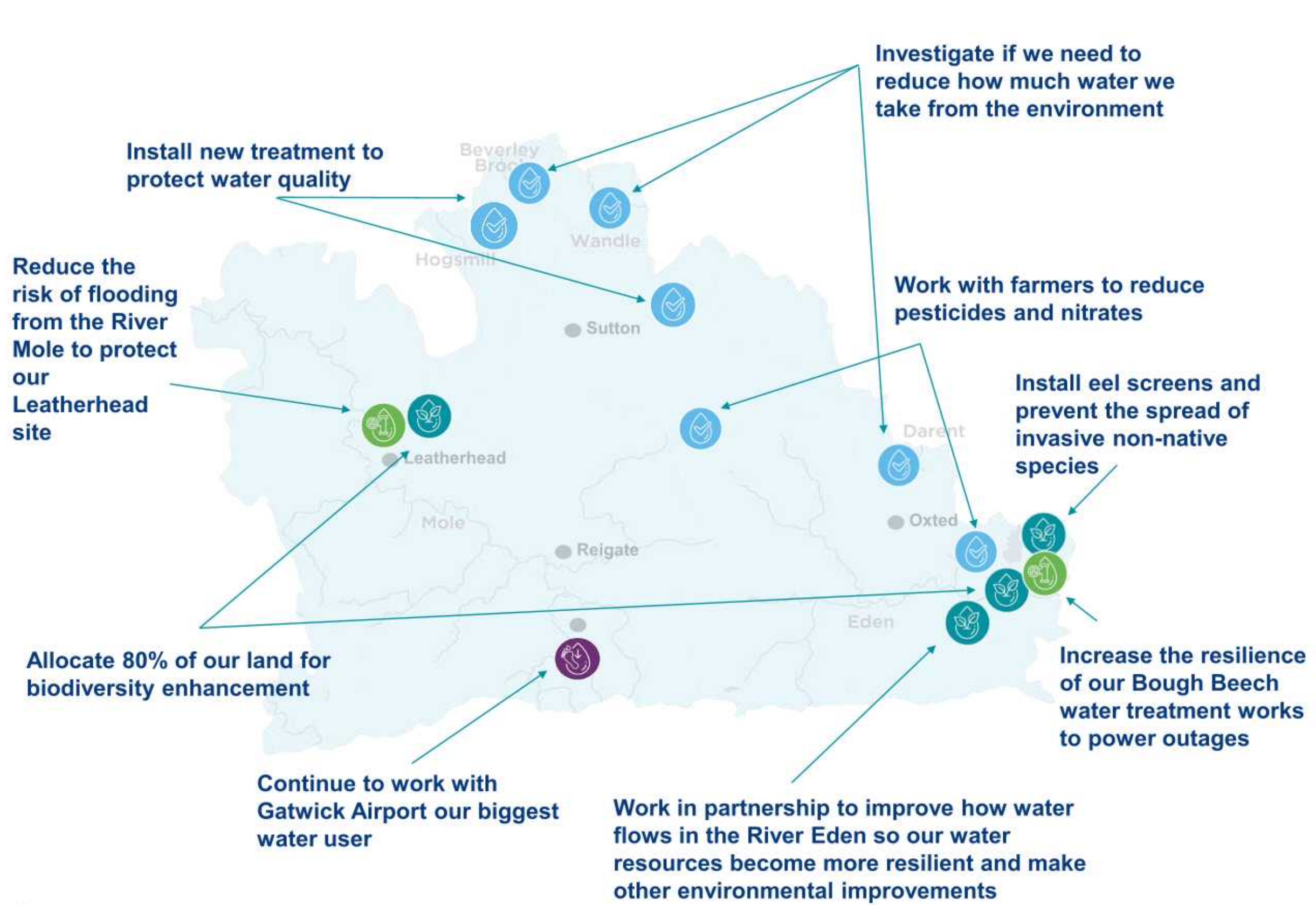
You expect us to actively enhance the environment and many of you want us to go beyond our legal obligations to protect local rivers and chalk streams. We should reduce our carbon emissions steadily to achieve net zero by 2050.

We will:

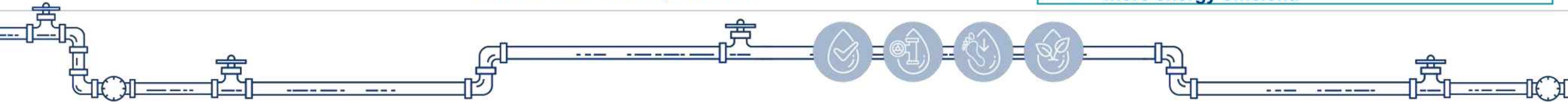
- Install eel screens and prevent the spread of non-native species on the rivers we take water from
- Work in partnership to improve water flows and the health of the River Eden so our water resources become more resilient and we can make other environmental improvements
- Allocate 80% of our own land for biodiversity enhancement
- Become more energy efficient to reduce our carbon emissions
- Be a responsible local employer and help educate and upskill young people.



What we'll deliver between 2025 and 2030



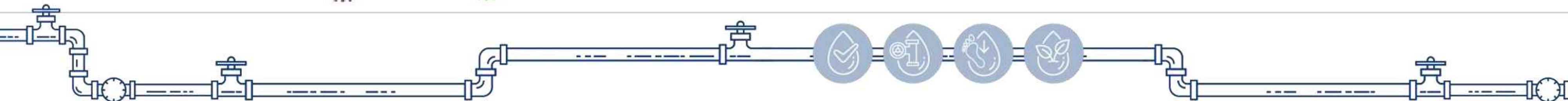
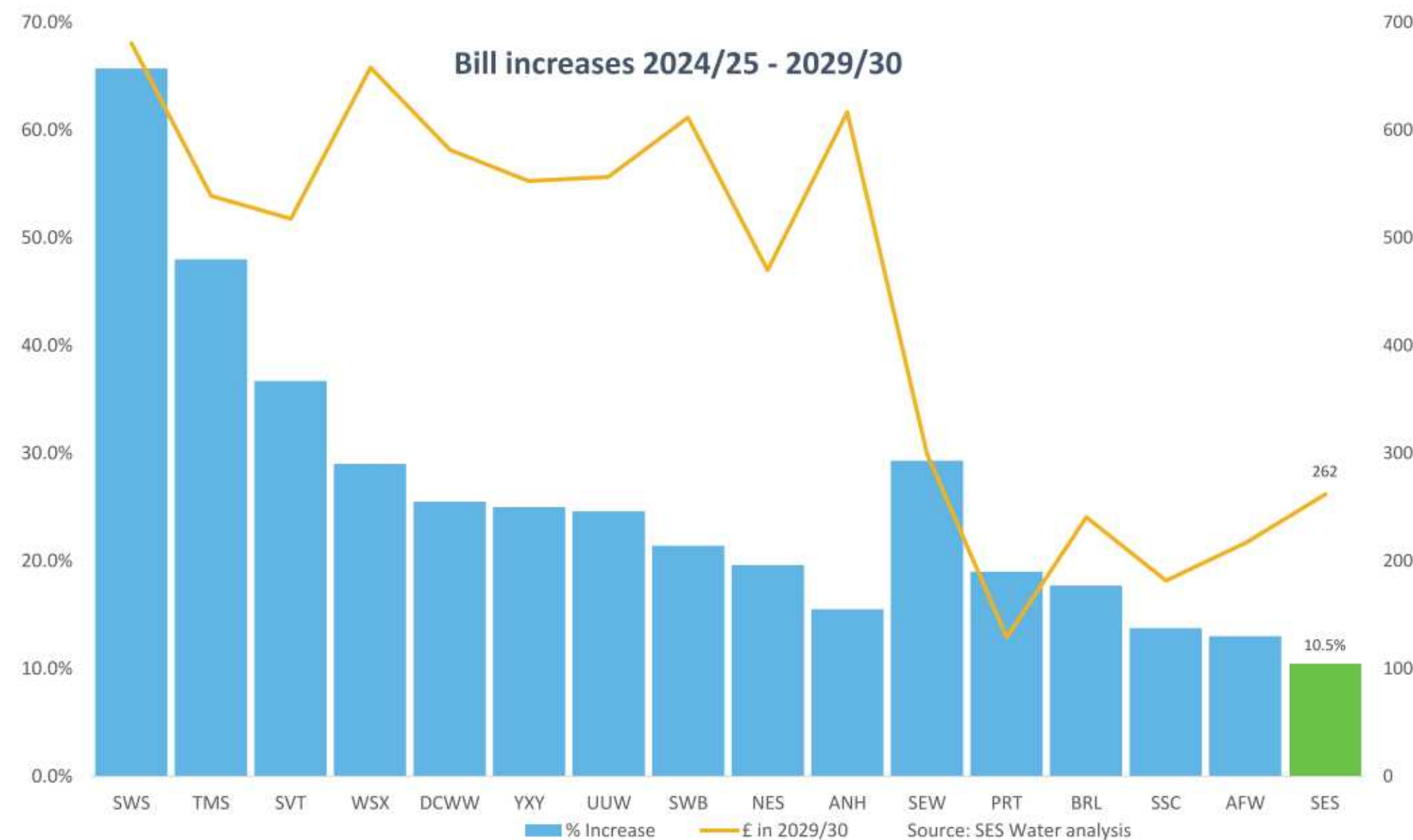
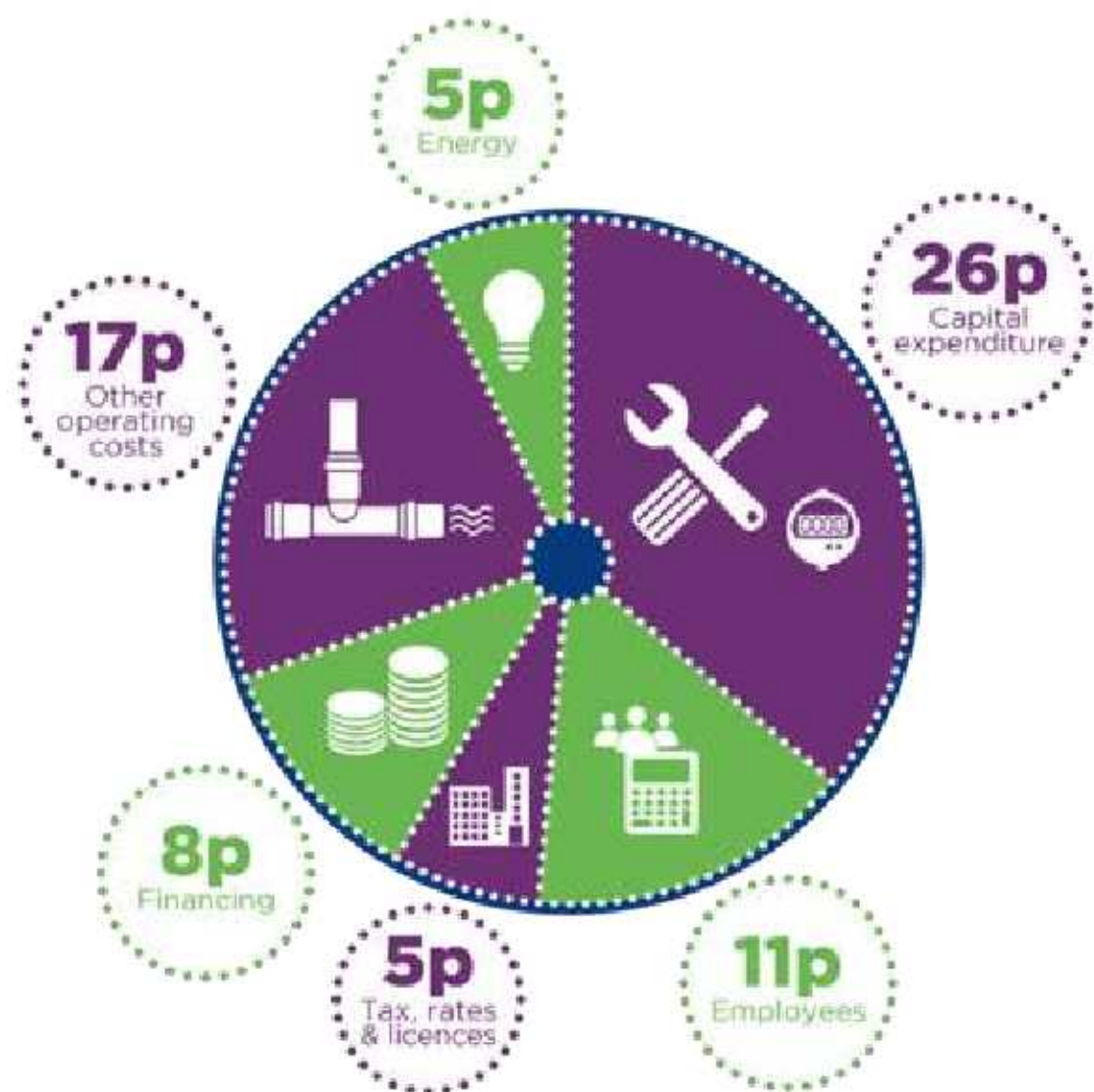
- ### Region-wide activity
- Replace 170 lead supply pipes at schools, colleges and nurseries
 - Install smart technology at all our water treatment works
 - Install more smart sensors across our pipe networks to detect smaller leaks
 - Find and fix more leaks and optimise water pressure
 - Use new technology to test the condition of our pipes and replace those at more risk of leaks and bursts
 - Install smart meters in homes and businesses alongside digital technology to help you detect leaks and manage your usage
 - Provide water efficiency advice, home visits and develop new tariffs to incentivise lower usage
 - Invest in extra cyber security to keep everyone's data safe
 - Double the number of pupils that take part in our education programme
 - Reduce our carbon emissions by becoming more energy efficient.



Funding our 2025 - 2030 business plan

- Shareholders will continue to provide **equity**
- Bills will rise by **10.5%** on average from 2025 to 2030 (circa **£25 in total**) - the lowest increase in the industry
- The average water-only bill will cost **£262 before inflation** in 2029/30.

Bill analysis - 2029/30



Keeping bills affordable



When we asked customers about our proposed plan :

- **66%** of household customers agreed with it
- **13%** said it would be very difficult to afford
- **52%** said it was affordable or they didn't know.



Department
for Work &
Pensions

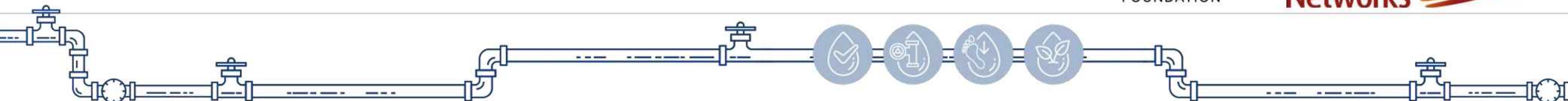


Communities
Working
Together



To help customers afford their bill we will:

- Provide a **50% bill discount** to **25,000 customers** - about **8%** of customers by 2030 - through our **Water Support tariff**.
- Offer **payment holidays** and **grants** to clear debt
- Introduce **smart meters** and **innovative tariffs** to encourage customers to save water and help those who need to use more
- Work with utilities and other partners to **reach more customers**, provide **targeted support** and make it easier for customers to **access extra help**.



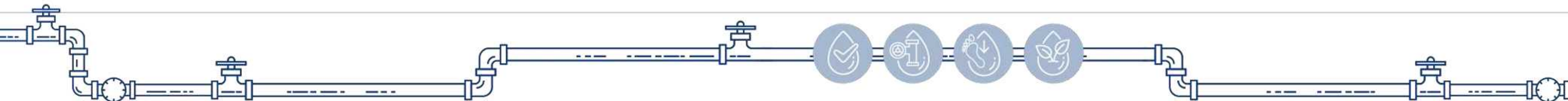
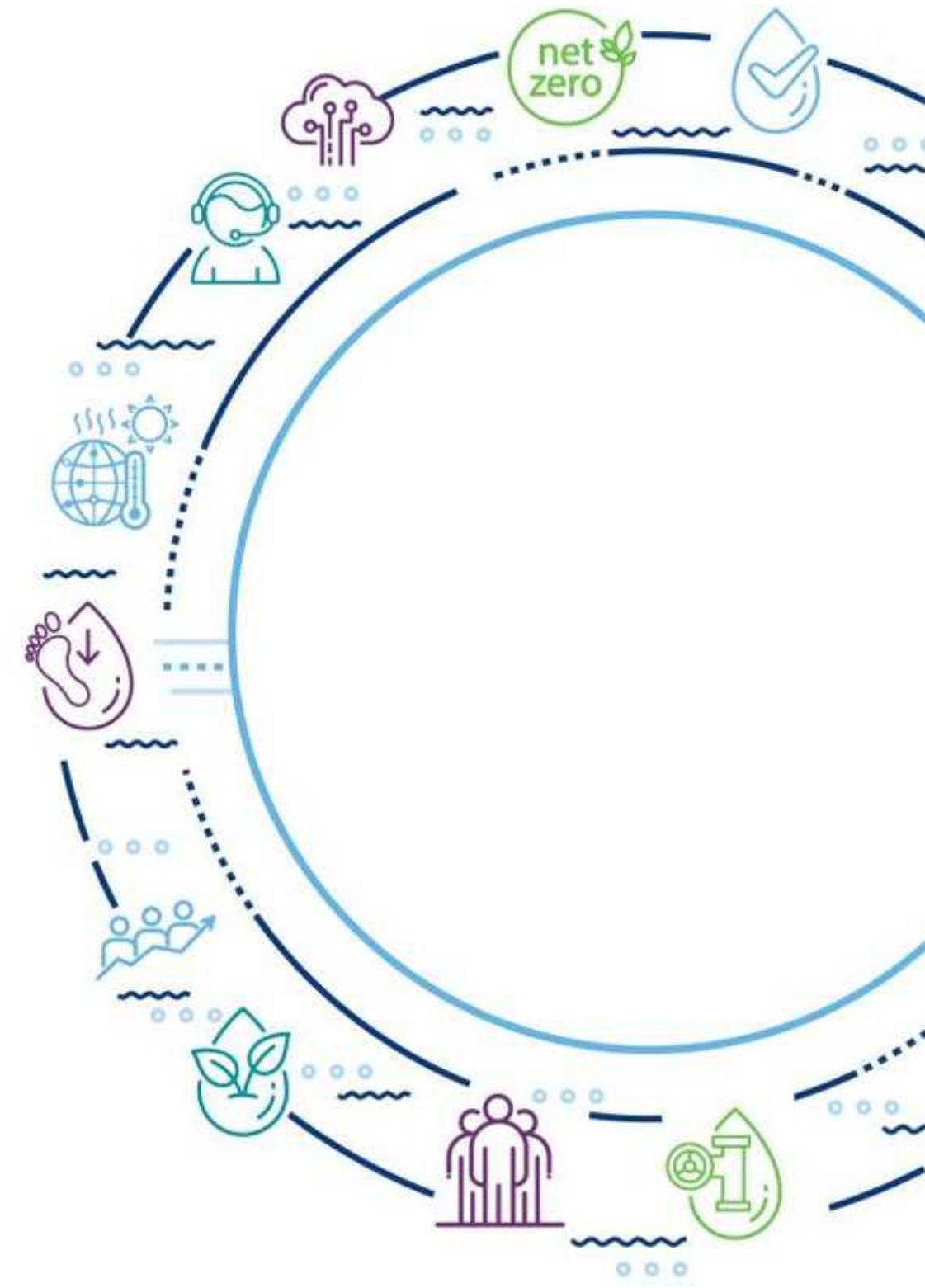


Your questions & comments



Next steps

- **By 23 November 2023:** Draft written record of meeting produced
- **By 15 December 2023:** Finalised written record of this meeting published on our website, including responses to questions raised
- **Spring 2024:** Ofwat will provide its draft determination of our business plan
- **Summer 2024:** We will respond to Ofwat's draft determination
- **December 2024:** Ofwat will provide its final determination
- **April 2025:** The next five-year investment period starts.





Link - [Your water, your say survey - Ofwat](#)

