

User Forum

MOSL

Online

Hosted by
Markus Lloyd & Simon Bennett
13 Mar 2024



Agenda

Item	Description	Who	Time
1	Introduction	Markus Lloyd & Simon Bennett	1500-1505
2	Data Assurance Service update	Matt Labrum	1505-1515
3	Change Update	Monica Falasca	1515-1525
4	Interim Improvements from MPF Reform	Markus Lloyd	1525-1535
5	Flourishing Market Road Map	Markus Lloyd	1535-1545
6	Market Improvement Fund: Project No Flow outputs	Claire Stanness & Natalie Martin	1545-1615
7	Debate: 3rd Party reporting of broken or leaking meters	Simon Bennett	1615-1645
8	AOB and Close	Markus Lloyd & Simon Bennett	1645-1650

Data Assurance Service

User Forum update

Matt Labrum
Programme Lead

Agenda

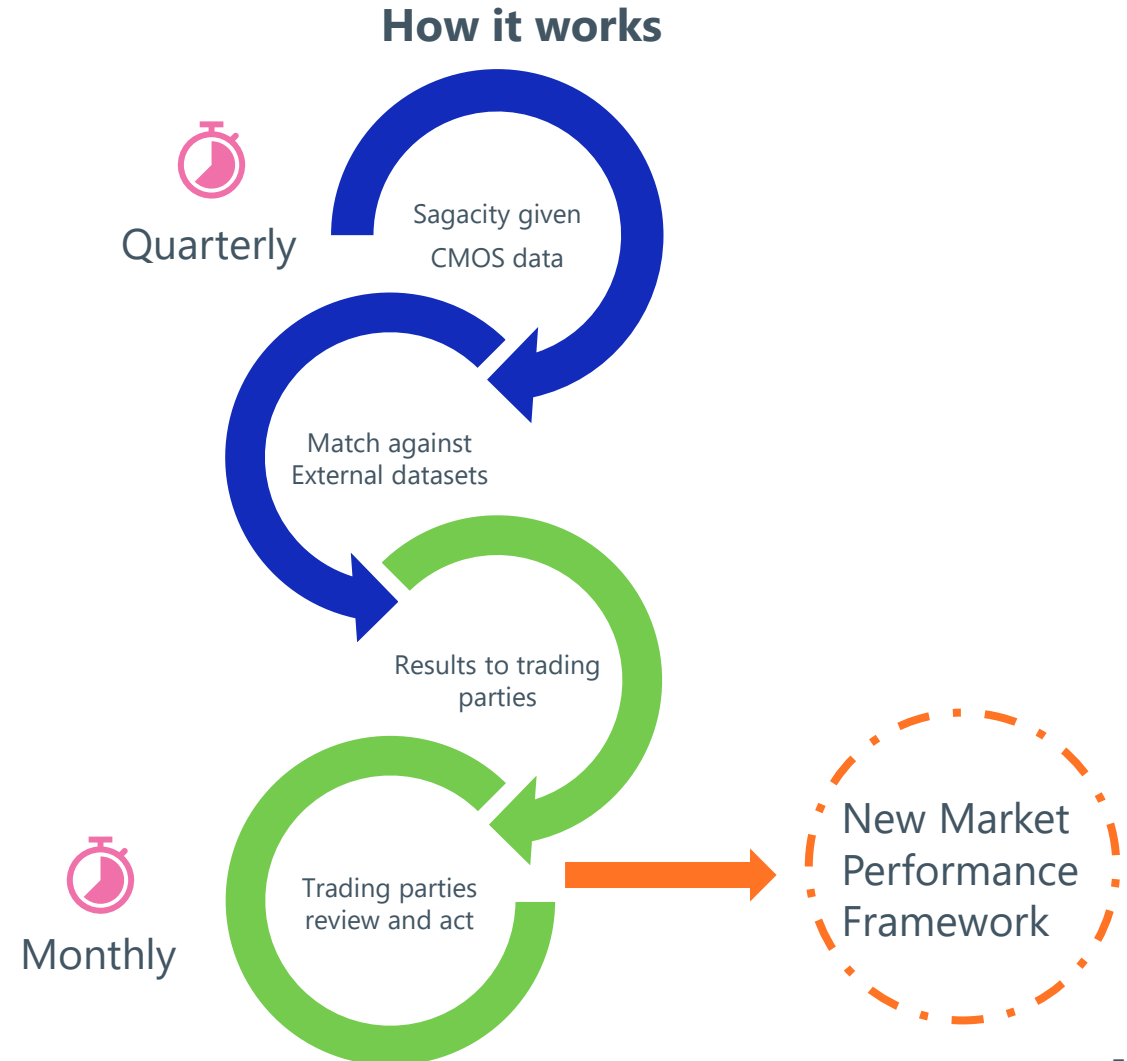
- Summary of the programme
- Market Eligibility Assurance Review: progress so far
- Year two milestones
- Upcoming Premises and Address Assurance Review
- Next steps

How it works

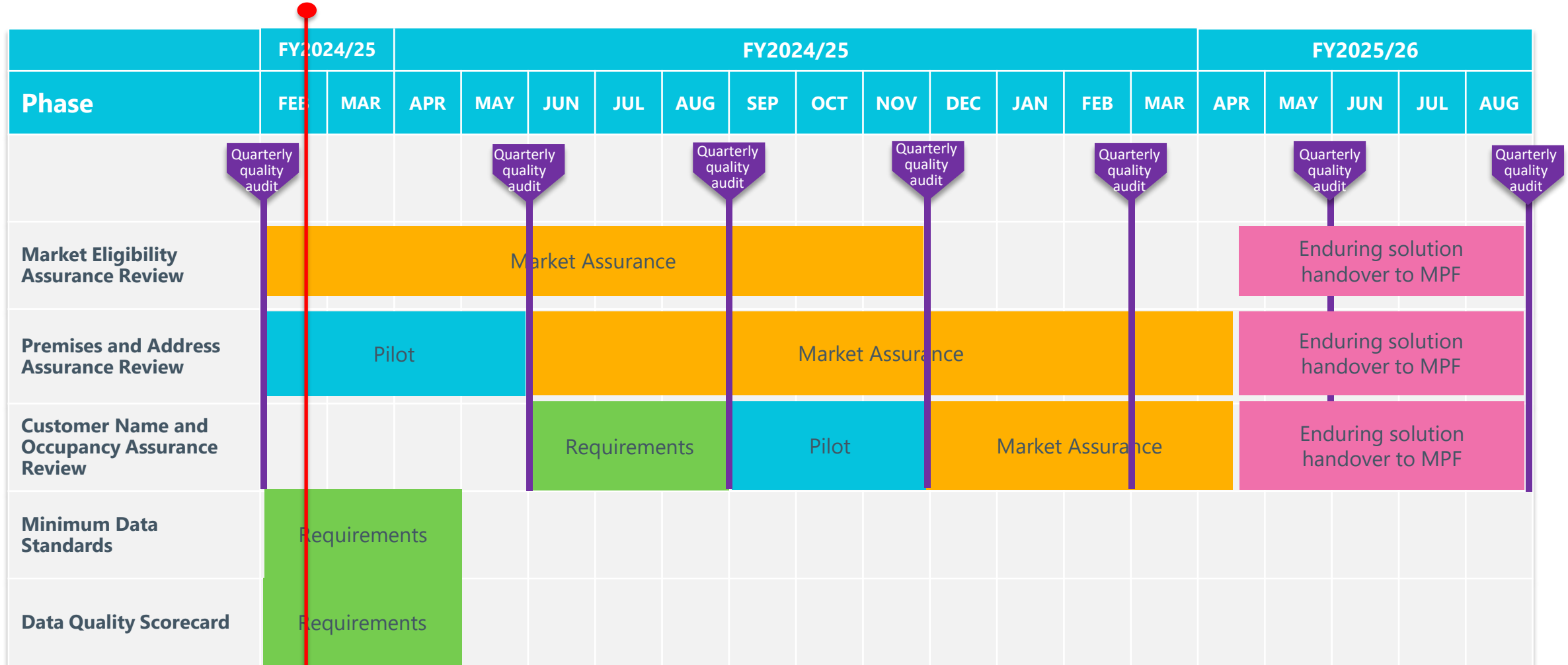
- Working with Sagacity in 2022/23 revealed significant issues with market data, leading to us focusing on three areas as part of a Data Assurance Programme:

- 1) Market Eligibility
- 2) Premises & Address
- 3) Customer Data.

- For each phase, we **collaborate with a trading party working group** to determine best approach, pilot the approach before launching a market assurance activity.
- The programme and the working group created a criteria for identifying potential non-eligible premises, launching a market assurance exercise in November 2023. We will undertake a similar approach to the other focus areas.

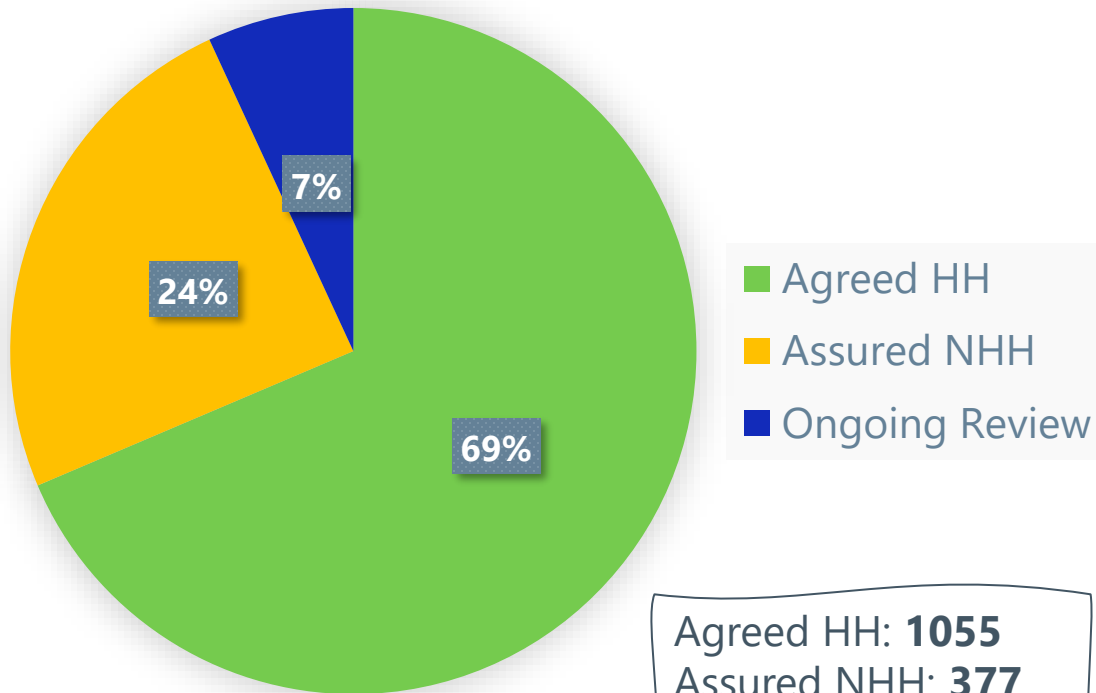


Data Assurance Programme Plan



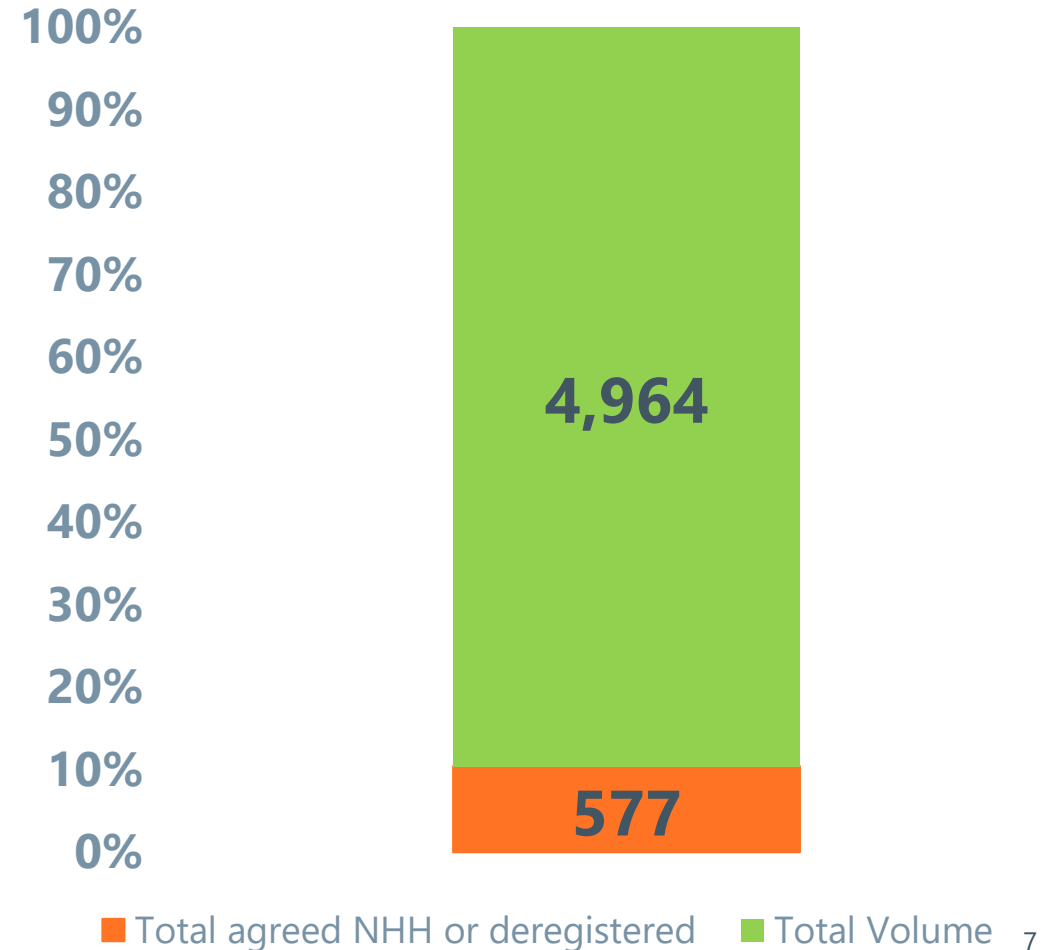
Market Eligibility Assurance Review

Overall Approval Rate



Agreed HH: **1055**
Assured NHH: **377**
Ongoing Review:
106

'Level one' progress



Premises and Address

Benefits

- Analysis shows that improving address data quality leads to :
 - Higher volumes of meter reads per year
 - Lower volumes of Long Unread Meters (LUMs) and Legacy Long Unread Meters (LLUMs)
 - Improved vacancy / occupancy accuracy
 - Improved trading party performance on OPS an MPS.
- These improvements all support accurate and timely customer bills and settlement, which receive the highest number of complaints from non-household customers.

Premises and Address Data Quality impacts

Category	Verified%	Market %	Unverified%	Unmatched%
AVE Reads Per Year	2.32	2.25	2.17	2.10
Legacy Long Unread Meters Rate*	1.46%	1.66%	1.85%	2.16%
Long Unread Meters Rate*	9.58%	10.81%	12.18%	13.55%
Vacancy Rate*	12.65%	15.22%	18.79%	20.00%
Long Term Vacant Rate*	2.36%	3.47%	4.90%	6.31%
Vacant @ Registration*	0.61%	0.97%	1.47%	1.79%
Retailer MPS Performance**	93.26%	92.74%	92.18%	91.23%
Wholesaler MPS Performance**	89.41%	89.00%	88.84%	87.37%

*Perfect performance 0%

**Perfect performance 100%

Next steps

**March – May
2024**

Commence
address data
pilot

**September –
November 2024**

Commence
customer data
pilot

June 2024

Launch Premises
and Address
Assurance Review

December 2024

Launch Customer
Data Assurance
Review

Questions?



Changes

Monica Falasca
MOSL

13 March 2024



Change Proposals/Reports to table at CCC in the next 3 months*



Reference	Title	Summary	Stage	CCC meeting date(s)
CPW139f	Bilateral Hub (Accredited Entities, Planned and Unplanned Events, additional enhancements pt1)	<p>This will deliver processes B2, B4, B6, B8, B9, I2, I6, I9 and I12 - these processes are all metering activities, disconnections and reconnections carried out by Accredited Entities. They will be delivered as J1 and J2.</p> <p>Will also deliver processes D1, D2, D3, E1, E2, E3, E4, E5, E6, E7 around planned and unplanned activities.</p> <p>First phase of the delivery of additional enhancements (H1, B5, cancel info request, extension to the retention period).</p>	Recommendation	09 Apr 24
CPM058 & CPW149 (a)	MPF Reform – Governance	Formalises the four levels of governance for overseeing and administering the proposed MPF. This will include creation of the Performance Assurance Committee (PAC) and PAC governance to replace the Market Performance Committee.	Recommendation	09 Apr 24
CPM058 & CPW149 (b)	MPF Reform – Tools Part 1	Sets out which intervention tools will form part of the MPF and how they will be managed, including market entry assurance, assurance statements, targeted audits, peer comparison, financial incentives, and rectification and escalation.	Recommendation	14 May 24

Awaiting Ofwat Decision*

Reference	Title	CCC Recommendation	Decision Due	Implementation Date
CPM054 & CPW145	Deductions and Withholdings under Dispute Process	Majority recommendation	10 Jan 24	16 Feb 24
CPW132	Credit Support and Wholesaler Credit Ratings	Unanimous rejection	1 Feb 24	1 Mar 24
CPW142	Wholesaler Smart Meter Reads	Majority recommendation	13 June 24	6 Dec 24
CPW148	Transfer Read Notifications for Outgoing Retailers	Unanimous recommendation	13 June 24	6 Dec 24

Awaiting Implementation*

Reference	Title	Central System Impact	Date of Release
CPM057	Late payment of MO charges	N	4 Apr 2024
CPM056	Resource Support to Industry Groups	N	4 Apr 2024
CPW143	Wholesaler Maintenance of YVEs for NMMs	Y	10 May 2024

Implementations*

Reference	Title	Central System Impact	Date of Release
CPW141b	Clarifying Meter Chamber Responsibilities	N	16 Feb 2024
CPM055	CMOS Data Escrow	N	16 Feb 2024
CPW139e	Bilateral Hub (Miscellaneous)	Y	13 Mar 2024

MPF Reform Interim Improvements

Updated dashboards

Markus Lloyd
MOSL

Introduction

As part of the MPF Reform programme, MOSL identified improvements to the current MPF that can be implemented immediately:

The following changes were approved via Code Change CPW144:

- Suspending Retailer Market Performance Standards charges MPS18 & 19 when there are open requests in the bilateral hub for C1 (meter verifications) and B5 (meter repair/replace) tasks
- Remove Wholesaler MPS4, 8 & 9 charges
- Introduce new 'Additional Performance Indicators' to track lateness of C1 and B5 tasks
- Introduce new 'Market Indicator' metric to track deferred requests and average length of deferrals

The deck shows the location of the two Additional Performance Indicators (APIs) for wholesaler LUMs (**WLUM**) and **Days Past SLA** within the MPF Interim Improvement Charts on the MyMOSL

The deck also shows the location of the new Market Indicator for **Deferrals**, located within MyMOSL

Explanation of API - WLUM

New APIs

Wholesaler Long Unread Meters

A Wholesaler Long Unread Meter (WLUM) is defined as a Long Unread Meter (LUM) against which an open bilateral Operational Request ID (ORID) for a meter verification or repair is outstanding.

Once the ORID is closed the WLUM is returned to the retailer's list of LUMs. Once the retailer reads the meter (or enters the W Read which may have been supplied by the wholesaler on completion of the request) then it will be removed from the retailer's LUM list.

A WLUM which has been deferred will be returned to the retailer's list of LUMs.

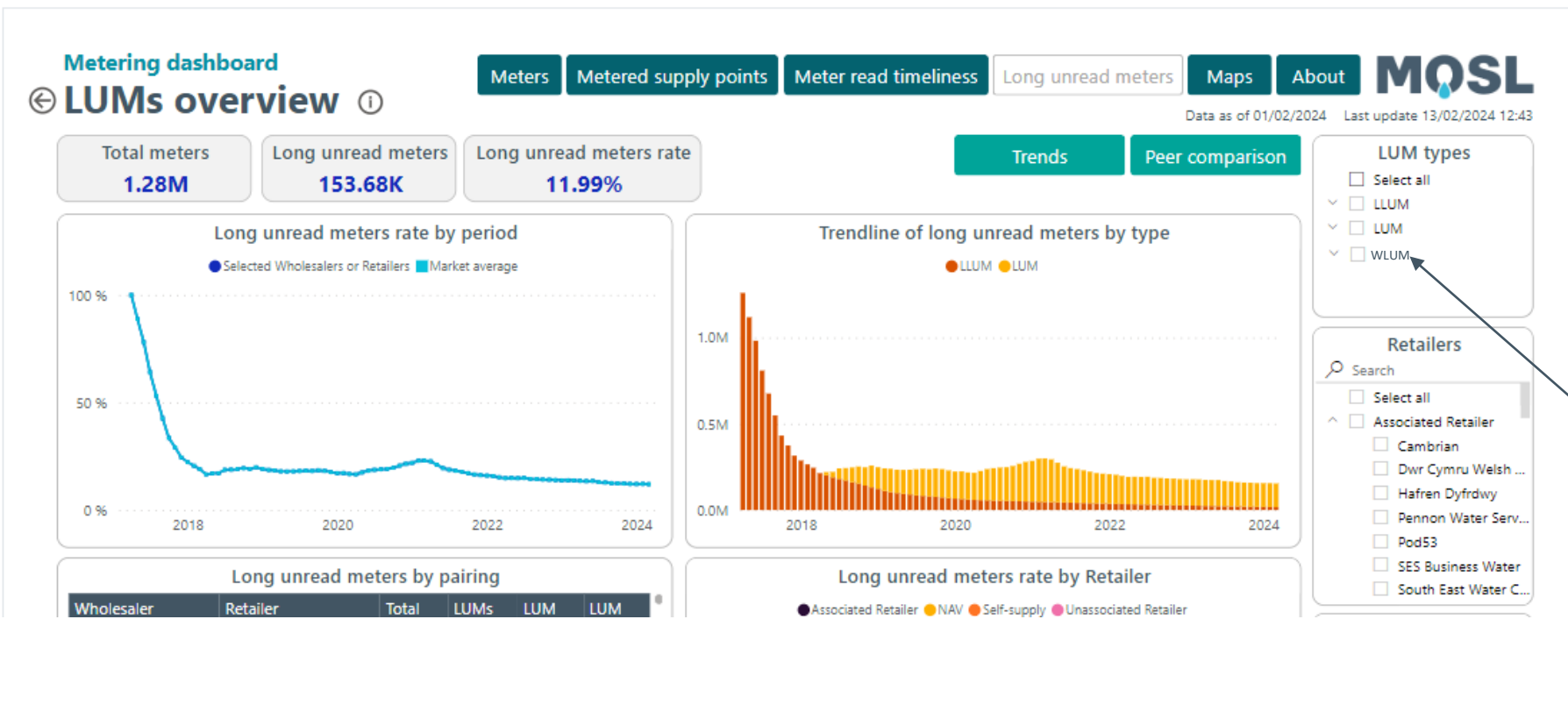
The WLUM metric is represented in the Metering chart under "Long Unread Meters" within MOSL's Market Insights charts and contributes to the peer comparison tables of the wholesaler Holistic Reports on MyMOSL

Changes to APIs

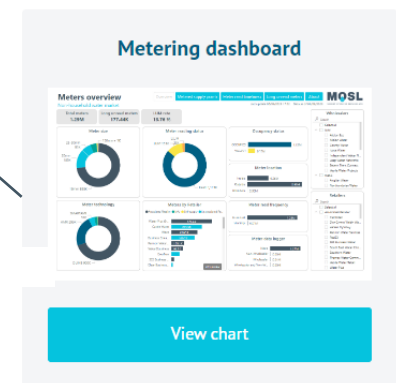
Long Unread Meters

The Long Unread Meter (LUM) API will no longer include meters which have an open bilateral request. Such meters will be represented within the WLUM API. This change ensures that retailers are not held accountable for failing to read meters that cannot be found or read and encourages retailers to raise bilateral requests against them. The LUM metric continues to be reported on the Metering chart within MOSL's Market Insights charts.

WLUM API Location



Location:
MOSL website
Market Insights
Metering dashboard
Long unread meters
LUM types
WLUM



Using the filters

Metering dashboard
LUMs overview ★

Meters | Metered supply points | Meter read timeliness | Long unread meters | Maps | About | MOSL

Data as of 01/02/2024 | Last update 08/03/2024 17:10

Total meters: **207.28K** | Long unread meters: **391**

Long unread meters rate by period

● Selected Wholesalers or Retailers | ■ Market average

Breakdown of WLUMs by wholesaler(s)

Wholesaler	Retailer	Total Meters	LUMs	LUM rate	LUM (YoY)
Anglian Water	Wave	101,950	189	0.19 %	0.19 %
Northumbrian Water	Wave	78,468	78	0.10 %	0.10 %
Thames Water	Wave	7,355	41	0.56 %	0.56 %
Severn Trent Water	Wave	3,447	35	1.02 %	1.02 %
South Staffordshire Water	Wave	869	11	1.27 %	1.27 %
Affinity Water	Wave	2,115	10	0.47 %	0.47 %
United Utilities Water	Wave	5,311	8	0.15 %	0.15 %
Yorkshire Water	Wave	3,080	7	0.23 %	0.23 %

Total of LUMs from retailer turned into WLUMs for wholesaler(s)

Long unread meters by type

● WLUM

Period: 01/02/2024
 LUM Status: WLUM
 Meter Count: 391

Long unread meters rate by Retailer

● Associated Retailer

Wave: 0.2 %

LUM types

- Select all
- WLUM
- LLUM
- LUM

Retailers

- Pennon Water Serv...
- Pod53
- SES Business Water
- South East Water C...
- Southern Water
- Thames Water Co...
- Veolia Water Retail
- Water Plus
- Water Plus Group

Wholesalers

- Select all
- WoC
- WaSC
 - Anglian Water
 - Northumbrian Water
 - Severn Trent
 - Severn Trent Water
 - South West Water
 - Southern Water

Select retailer

Select wholesaler(s)

Added to holistic reporting

- This Additional Performance Indicator aims to keep the focus on resolving the WLUMs, even if the wholesaler has comparatively few WLUMs recorded against it. The holistic reports therefore represent the number of WLUMs recorded against a wholesaler as a percentage of all tradeable water SPIDs recorded against the wholesaler, and then multiplies that figure by the average number of days since those WLUMs were last read to determine wholesaler rankings.

Metering & verification	Customer Service & Disconnection	MPS	UPRN	VOA	GIS	Long Term Vacant	Legacy Long Unread Meters	Wholesale Long Unread Meters	RMAX Overall Score	RankSum	Average%	Total Rank
100.00 %	100.00 %	99.56 %	90.74 %	71.48 %	99.81 %	99.00 %	99.99 %	99.94 %	82.50 %	32	95.61 %	1
98.71 %	98.36 %	97.02 %	98.74 %	88.74 %	93.37 %	98.13 %	99.99 %	99.93 %	78.33 %	46	97.00 %	2
97.20 %	98.61 %	94.83 %	96.32 %	98.01 %	97.14 %	98.27 %	99.50 %	99.79 %	79.17 %	51	97.74 %	3
96.09 %	99.44 %	98.16 %	96.84 %	87.76 %	96.85 %	98.18 %	98.79 %	99.92 %	81.43 %	56	96.89 %	4
97.01 %	93.38 %	90.44 %	92.41 %	87.52 %	99.35 %	99.83 %	97.96 %	99.85 %	83.57 %	63	95.30 %	5
100.00 %	100.00 %	91.91 %	84.70 %	77.65 %	97.99 %	97.60 %	98.74 %	99.82 %	87.69 %	64	94.27 %	6
98.45 %	100.00 %	88.21 %	86.12 %	80.41 %	87.69 %	97.80 %	99.69 %	99.94 %	77.14 %	68	93.15 %	7
90.75 %	95.08 %	89.75 %	97.16 %	95.77 %	95.20 %	98.82 %	99.25 %	99.60 %	77.69 %	70	95.71 %	8
69.45 %	94.16 %	98.71 %	87.78 %	88.29 %	95.52 %	99.07 %	99.25 %	99.78 %	80.00 %	73	92.45 %	9
78.37 %	89.72 %	68.88 %	98.58 %	98.25 %	97.80 %	99.85 %	97.81 %	99.60 %	68.57 %	76	92.10 %	10
95.39 %	97.57 %	85.37 %	54.74 %	59.00 %	91.91 %	98.00 %	99.97 %	99.95 %	79.00 %	82	86.88 %	11
93.36 %	80.26 %	82.78 %	89.19 %	68.42 %	69.63 %	99.05 %	99.59 %	99.59 %	71.82 %	95	86.88 %	12
91.09 %	90.59 %	82.42 %	74.68 %	88.26 %	96.67 %	94.76 %	98.58 %	99.88 %	80.00 %	98	90.77 %	13
74.36 %	78.93 %	79.31 %	93.98 %	90.97 %	97.22 %	95.88 %	97.58 %	99.64 %	67.86 %	98	89.76 %	14
91.43 %	93.22 %	89.46 %	75.22 %	48.98 %	97.30 %	95.40 %	98.18 %	98.98 %	75.83 %	104	87.57 %	15

Explanation of APIs – Days Past SLA

New API

Days past SLA for Bilateral Requests

The desired behaviour of the “Days past SLA” Additional Performance Indicator is to drive a positive customer outcome by reducing not only late deliveries of requests but also the overall lateness of these requests. This metric therefore expresses a wholesaler’s late tasks as a percentage of all open tasks and then multiplies that by the average lateness in days.

The Days Past SLA metric is presented within the MPF Interim Improvements Dashboard on MyMOSL and currently does not contribute to the peer comparison tables of the wholesaler Holistic Reports

Days Past SLA API Location

Retailer Settlement dashboard Report Detailing retailer settlement-related market information View report	School Benchmark dashboard Overview of the variance of average school water usage View report	Settlement dashboard Summary of settlement metrics View report	Settlement on YVE or ILE dashboard Information regarding different settlement types View report
Settlement Parity dashboard Parity between settlement runs which may be negatively impacted by a reliance on estimates and a failure to submit accurate and timely meter reads View report	Switching dashboard Information regarding several KPIs related to Switching View report	Vacancy dashboard Analysis of the various challenges within vacancy View report	Wholesaler Settlement dashboard Wholesaler settlement-related market information View report
Operational Large SPIDs dashboard A compilation of visuals related to the Large SPIDs in the NHH water Market View report	Data Assurance Market Assurance progress dashboard View report	MPF Interim Improvements Contains the Deferrals market indicator View report	

Location:
[MyMOSL](#) > My Charts
> Dashboards

My Charts
View NHH Market data insights, dashboards, share performance data, etc.
[Open](#)



Dashboards
A self-serve view of enriched market data, includes views for Market data, Settlement data, etc.
[View menu](#)



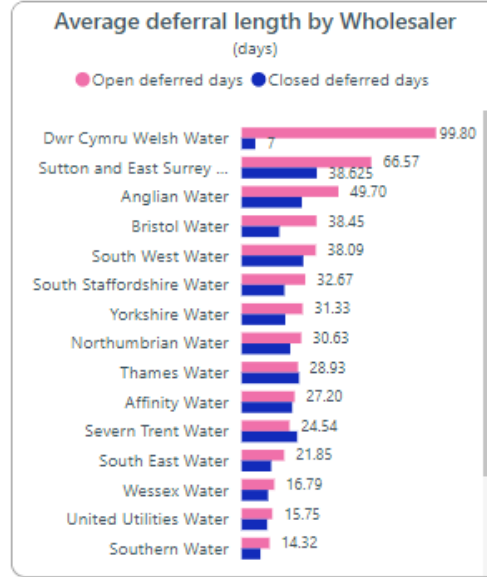
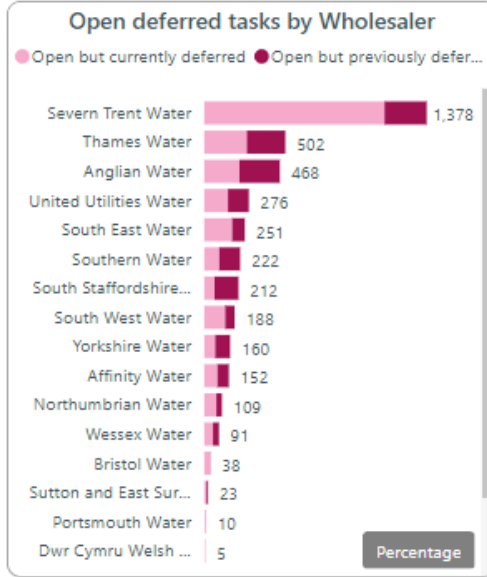
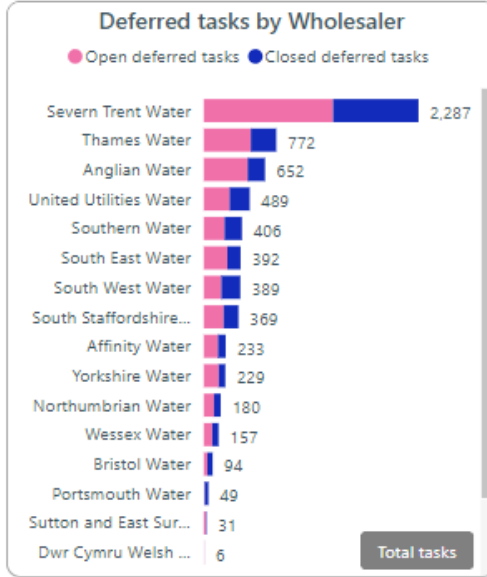
Landing page



MPF Interim Improvements Deferrals

Total deferrals **6,735**
Average deferral length (days) **29.0**
Open deferrals **4,085**
Open deferred tasks **34.1%**
Deferrals
Days past SLA
About
MOSL

Data as of 01/01/2024 Last update 01/03/2024 10:10



Reporting Period

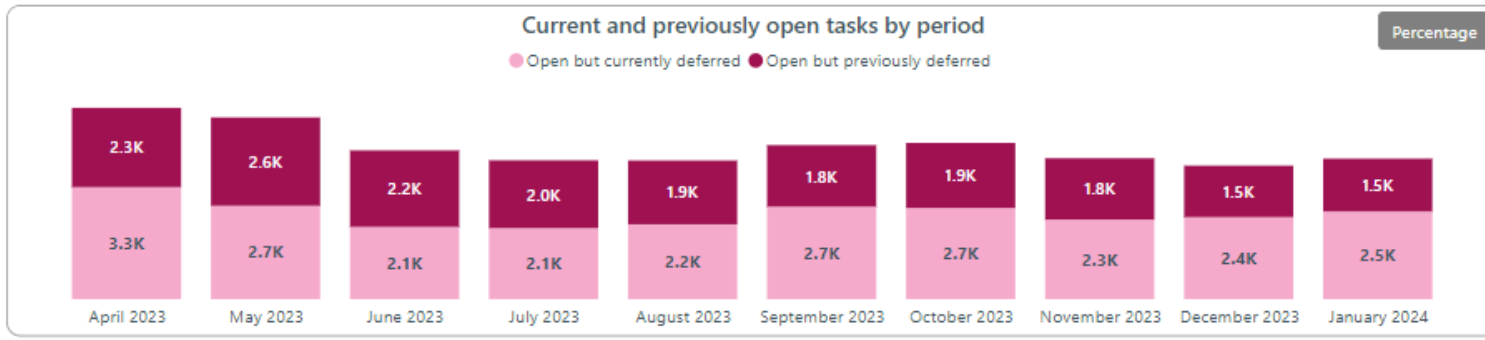
Select all

- January 2024
- December 2023
- November 2023
- October 2023
- September 2023
- August 2023
- July 2023
- June 2023
- May 2023
- April 2023

Wholesalers

Search

- Select all
- WoC
 - Affinity Water
 - Bristol Water
 - Dwr Cymru Welsh ...
 - Hafren Dyfrdwy
 - Portsmouth Water
 - South East Water
 - South Staffordshir...
 - Sutton and East Su...
- WaSC
 - Anglian Water
 - Northumbrian Water
 - Severn Trent Water
 - South West Water
 - Southern Water
 - Thames Water
 - United Utilities Wa...



Days Past SLA API

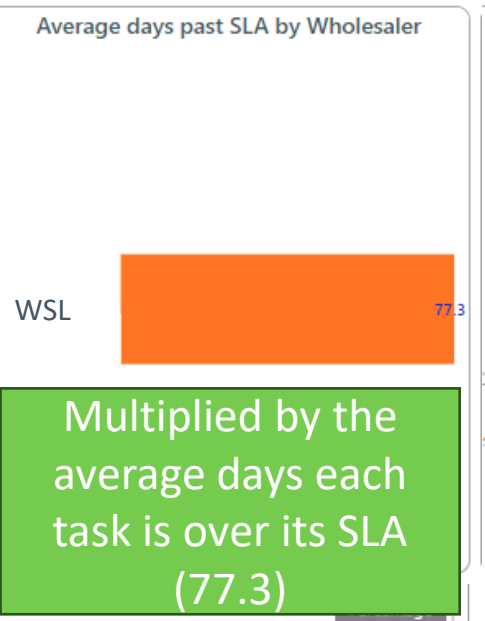
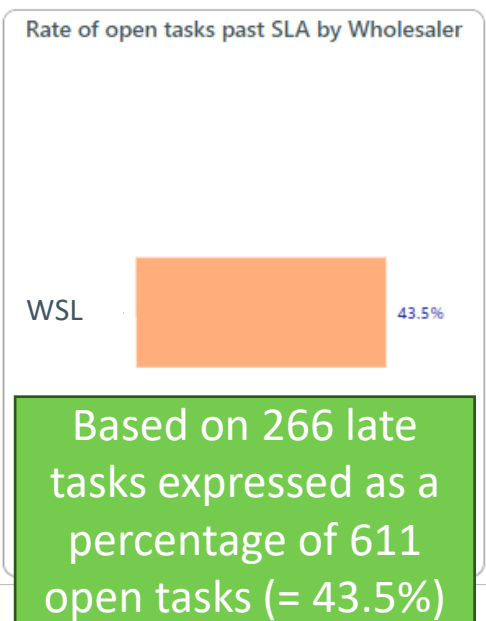
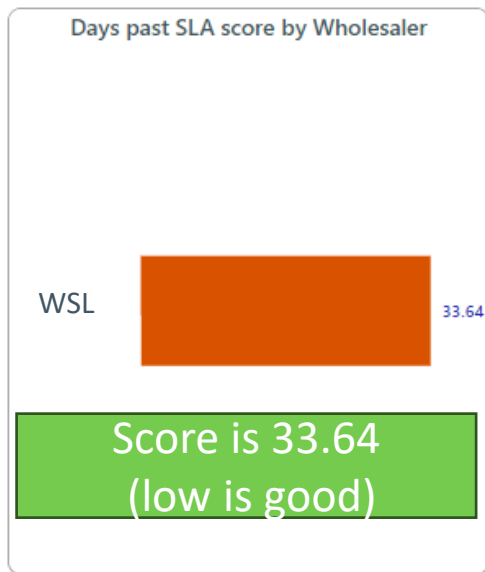
MPF interim improvements

Days past SLA

Late open tasks **266** Average days past SLA **77.3**

Deferrals Days past SLA About **MOSL**

Data as of 01/01/2024 Last update 13/03/2024 12:32



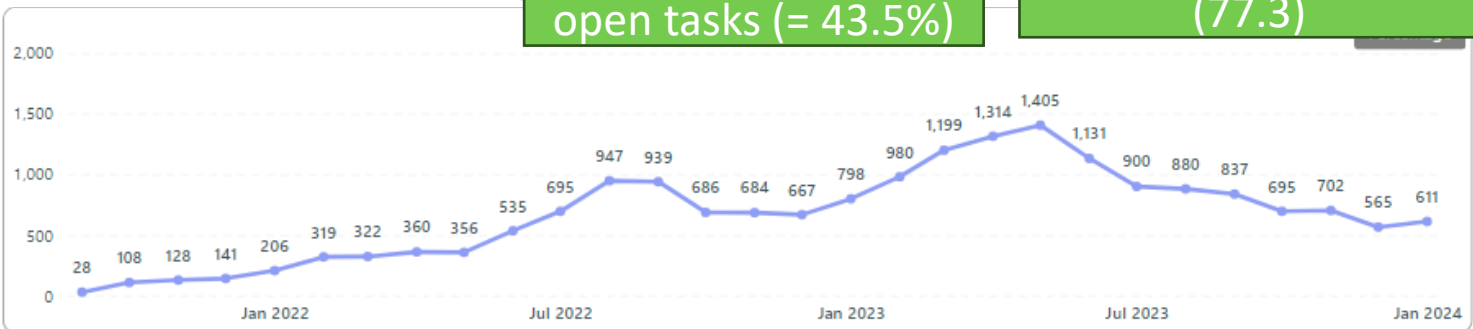
Reporting period

- Select all
- 2024
 - January
 - February
 - March
 - April
 - May
 - June
 - July
 - August
 - September
 - October
 - November

Wholesalers

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Explanation of Market Indicator

New Market Indicator

Deferrals count

The Deferrals Count is a market indicator introduced by the Market Performance Framework Reform program. It monitors the volume and duration of the Service Level Agreements (SLAs) raised for the bilateral processes covering meter verification, repair and replacement (SLA C1-1, SLA C1-2, SLA C1-3, SLA C1-4, SLA B5-1). It is important to note that this is not one of APIs that contribute to the Holistic Reports. It is a Market Indicator; it assigns no targets, makes no comparison between peers, does not count towards overall performance assessment, and is not presented to the public.

The Deferrals chart is now live within the charts section of [MyMOSL](#)

Deferrals Market Indicator Location

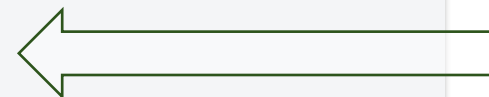
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Report

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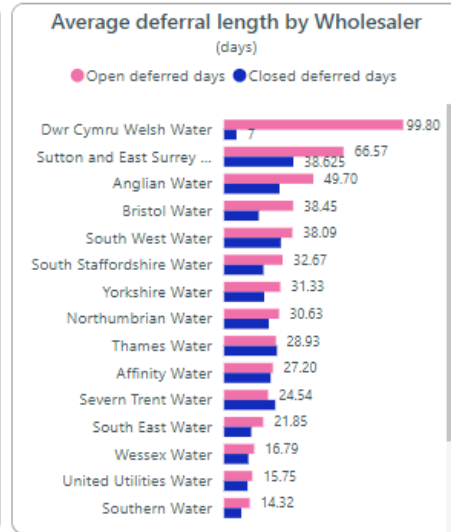
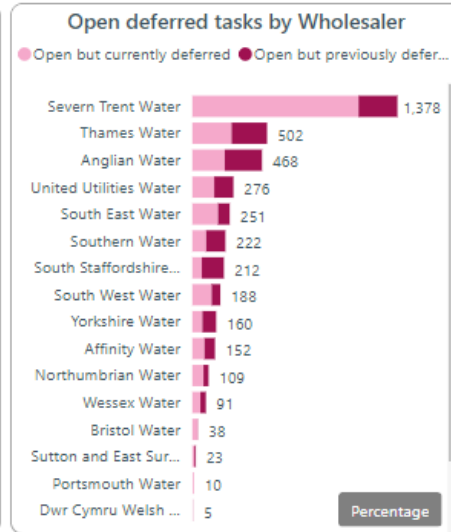
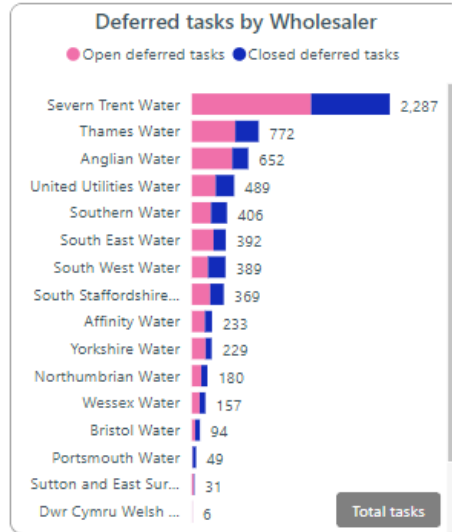
Deferrals

Days past SLA

About

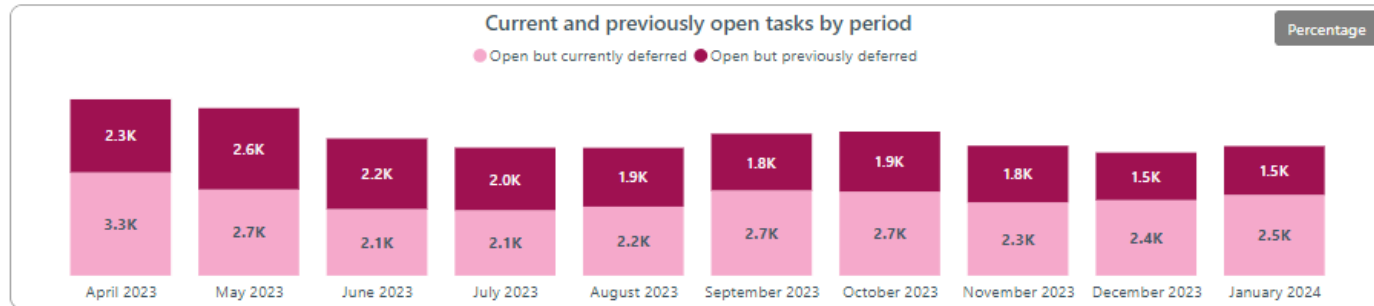


Data as of 01/01/2024 Last update 01/03/2024 10:10



- ### Reporting Period
- Select all
 - January 2024
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 - October 2023
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 - United Utilities Wa...



About

Visual definitions:

Open deferred tasks - this is the number of open tasks that are currently or were previously deferred. This is split into two groups: currently open deferrals and open but previously deferred.

- *Open but currently deferred tasks* = the number of tasks that have been raised by Retailers to the Wholesaler (or raised by Wholesalers themselves), as of the end of the chosen reporting period, that are still awaiting resolution and have been deferred by the Wholesaler (i.e. open and deferred).
- *Open but previously deferred tasks* = the number of tasks that have been raised by Retailers to the Wholesaler (or raised by Wholesalers themselves), as of the chosen reporting period, that are still awaiting resolution and has also been deferred previously by the Wholesaler (i.e. raised, deferred in a previous reporting period, brought back into the workstack and the deferred again in the chosen reporting period).

Open tasks excluding deferrals = the number of tasks that do not or have not been deferred in its lifecycle.

Closed deferred tasks = the number of tasks that have been closed by the Wholesaler, in the chosen reporting period, which would have been deferred at some point in its lifecycle.

Open deferred days = the number of days that open deferred tasks have been deferred by, as of the end of the reporting period.

Closed deferred days = the number of days that closed deferred tasks were deferred by, prior to the end of the reporting period.

Retailer type

- *Associated Retailer* = Retailer companies 'born' from Wholesalers either as a sole business or joint venture. In some instances, they may also remain part of the parent group structure.
- *Unassociated Retailer* = New entrants in the market joining either prior or since market opening, not connected to any Wholesaler
- *Self-Supply Retailer* = Trading parties who have opted to retail their own premises - they are both customer and retailer in the market
- *New Appointments and Variations (NAV)* = NAVs are limited companies that provide a water service to customers in an area which was previously provided by the incumbent monopoly providers.

Wholesaler type

- *Water and Sewerage Company (WaSC)* = Wholesaler supplying both water and sewerage services to their customers. They are the largest of the Wholesalers and can be known as 'incumbent monopoly providers'.
- *Water only Company (WoC)* = Wholesalers supplying 'water only' services to their customers, will operate within the larger Wholesalers' area, who will provide the sewerage services to these customers. They can be known as 'incumbent monopoly providers'.
- *New Appointments and Variations (NAV)* = As above. NAVs serve as both Retailers and Wholesalers for their customers.

Contact

For more information on this dashboard please contact operations@mosl.co.uk

Version history

Version	Date	Description
v0.0.1	05/03/2024	Initial dashboard release.



Project No Flow



Claire Stanness, Metering Operations Manager
MOSL User Forum March 2024

About the project

Project No Flow is a collaboration between Wave and consultants, Occutrace, to investigate the condition of meters in the Non-Household (NHH) market.

The purpose of this project was to establish:

If the meter was broken:

- How/why it was broken
- If read is correctly zero consumption
- Meter age
- Meter manufacturer
- If vacant
- If occupied, and occupier
- If demolished
- Photographic evidence of above



We selected a random sample of 2,000 SPIDs, as registered in CMOS.



There was no distinction between internal and external meters.



We considered all premises as occupied as per Wave's billing systems.



SPIDs with more than 3 reads showing no consumption.

Executive summary

We completed 1,618 visits and found:

17%

The meter was visibly OK and the premises was consuming water

30%

The meter was clearly damaged and no consumption was confirmed

52%

We were unable to confirm if the meter was operational

Of those:

Were vacant premises **27%**

Unable to Test **17%**

Meter not accessible **42%**

Key actions to take away:

- Retailers to review current operations to understand why incorrect information is imported into the market
- Record meter issues with SKIP codes and proactively resolve them with Wholesaler support
- Make sure occupancy data is accurate and up to date.
- Placement of any new meters fitted by wholesalers should ensure access to assets at all times.

Tested Outcomes

Unable to confirm operational	Number	Percentage
Meter visually OK	386	46%
Meter not found	187	22%
Access issue	183	22%
Unrecorded exchange	31	4%
Asset issue	30	4%
Premises issue	13	2%
Customer issue	8	1%
Health and safety	7	1%
Chamber issue	2	0
Total	847	100%

- ◆ Ensuring occupancy status is accurate, is important not only from meter access perspective but from debt management perspective too.
- ◆ 232 premises were found to be vacant, posing questions about data quality in the market



494 (64%) established as non-functional

This has many impacts on the customer, wholesale settlement and water demand data models throughout the country.

Meter problem reason	Number	Percentage
Aren't recording consumption	351	71%
Other visible damage	75	15%
Water ingress	40	8%
Glass smashed	12	2%
Dirt in dial	9	2%
No supply to trough	2	0%
Disconnected	2	0%
Tampered with	1	0%
Backwards consuming	1	0%
Leaking	1	0%
Total	494	100%



Age of meter

Age of Meter & Propensity to Fail	Total	Percentage
1-5	20	6%
6-10	67	21%
11-15	94	29%
16-20	58	18%
21-25	36	11%
26-30	44	13%
31-35	7	2%
Total	326	100%

- There is a correlation between the age of meter and their propensity to fail
- A quarter of meters are failing before 10 years old



Top conclusions

For retailers

- The split between meters that were broken and those that are genuinely zero consuming is approximately 60/40.
- Practices should include regular consumption checks to minimise length of time meters are incorrectly zero consuming.
- More needs to be done to educate customers about the importance of identifying a meter problem.

For wholesalers

- Wholesaler asset management/ meter replacement programs are inconsistent or non-existent. We need to understand what part wholesalers play and where their responsibility starts and ends.
- Be aware of the accuracy and reliability of each manufacturers' meters when investing in new assets.

For the market

- Some properties were zero consuming because they were a flat above the shop or a secondary supply for the business - should these meters still be in the market or be disconnected?
- Trading parties aren't always updating CMOS as the accuracy and completeness of CMOS data, especially around occupancy, became a reoccurring factor throughout the project.

Tackling this will require a highly collaborative approach, with MOSL, Ofwat, Strategic Panel, Retailers, Wholesalers, and their operational and meter reading service providers, all working together towards a common goal of accurate and timely meter reads with the customer being at the forefront.

Industry recommendations

Introduction of a meter asset management program

- In the interim to the smart meter roll-out, introduce a proactive meter asset management program whereby each Wholesaler visits each meter every 3 years for meters over 5 years old.

Replacement of broken meters with smart / remote reading technology

Tackling specific CMOS data quality weaknesses

- A targeted meter asset data quality improvement project could be initiated to enrich CMOS data and make it a viable 'single source of the truth'.

Introduction of new measures for retailers identifying zero-consuming assets

- Create dashboard to indicate the wholesaler/retailer combinations to show the results of volume of zero-consuming meters identified, B1 bilats raised, meters replaced (SLA) and VA applied.

Potential future project to determine why a meter would stop recording consumption.





**Thank you,
any questions?**

Flourishing Market Roadmap

Markus Lloyd
MOSL



Key items

- **Consultation**
 - Round table events
 - UK Water Retail Council (UKWRC)
 - Major Energy Users Council (MEUC)
 - Market Comparison Report
 - **Metrics**
 - Baselineing
 - Potential future metrics
 - **Market Conditions**
 - Desired conditions
 - Dependencies
 - Delivery dates
 - **Roadmap**
 - Mapping Conditions to a Timeline
 - Representing Conditions against outcomes and enablers
-

UKWRC

Meeting with UKWRC 13 Oct, inviting their input into the Flourishing Market Roadmap

Considered key points from the Decker report into competition in the Non-Household market

The UKWRC committed to updating their market vision document and consider what performance indicators might be associated with the elements of their vision

MEUC

Round table held with MEUC on 13 Dec 24 following a survey to better understand from the larger customers focusing on:

- Their level of awareness around the DEFRA 9% target and the role they think NHH water retail market has in providing direction and/or regulation in support of managing water scarcity
 - Their perception of their own role in demand reduction
 - What they would like to be offered by their retailers in addition to the current core services
 - Their desired improvements in the digitization of their consumption and asset data and how they think automation might support their use of this data
-

Metrics

Legend

Green – Current Data available

Amber – Data available until end of 2022

Red – Data older than start of 2022

* - example shown in this deck

Metric	Most recent year available	Source
Awareness scores	2021-2022	Five years open for business: taking stock, by Ofwat *
Engagement scores	2021-2022	Five years open for business: taking stock, by Ofwat *
Measure of customers switching to access new service offerings	Not available	Not available (although switching data is available) *
Number of switch requests rejected by outgoing/incoming retailer	2022-2023	MOSL dashboard and CMOS data *
Overall customer satisfaction scores by retailer	2022	Testing the Waters 2022, by CCW
Total complaint numbers by retailer and by wholesaler	2022-2023	CCW data *
B-Mex scores	Not available	Not available
R-Mex scores	2023	MOSL dashboard
Performance against annual equivalent of 9% target	Not available	Not available
Consumption - proportion with access to smart meter data	2023	CMOS data
LUMs by year by retailer and wholesaler	2023	MOSL dashboard
Proportion of settlement charges that are derived from volumetric vs non-volumetric methods	TBC	TBC
Number of entrants and exits	2023	Ofwat's website *
Market share of retailers	2023	MyMOSL dashboard
Total settled value	2023	CMOS data
Overall profitability of retailers	2022	Ofwat data?
Net asset/liability of retailers	2022	Ofwat data?

Example - Market Entry

Market entrants from 2018 onwards

Retail entrants	Year of license granted	Self-supply entrants	Year of license granted
Smarta Water	2018	Blackpool Borough Council	2018
		British Telecommunications Plc	2018
		Coca-Cola European Partners	2018
		Elis UK Ltd	2018
		Heineken UK Ltd	2018
		Stonegate Pub Company Ltd	2018
Olympos Water Ltd	2019	John Lewis Plc	2019
		Kellogg Company of Great Britain	2019
		Nottingham City Council	2019
ConservAqua Limited	2020	David Lloyd Leisure Ltd	2020
		Sefton Council	2020
		J Sainsbury Plc	2020
		Arla Food UK Plc	2021
		Boots UK Ltd	2023

Example - Market Exit

Market exit from 2017 onwards

Retail exit	Year of license revoked
Cobalt Water Ltd	2017
Aquaflow Utilities Ltd	2019
South East Water Ltd	2019
SSWB Ltd	2019
NWG Business Ltd	2020
POD53 Ltd	2020
Three Sixty Water Ltd	2020
Tor Water	2020
Utility Bidder	2020
Water 71 Ltd	2020
Regent Water Ltd	2022
Water Plus Select Ltd (formerly Severn Trent Select Ltd)	2023

Example - Market Share

Retailer Name	Retailer Type	% Grand Total	Supply Points
Water Plus Select Limited	Associated Retailer	27.54%	713,984
Castle Water	Unassociated Retailer	19.16%	496,921
Wave	Associated Retailer	15.22%	394,646
Business Stream	Unassociated Retailer	15.19%	393,808
Water2business	Associated Retailer	6.77%	175,633
Pennon Water Services	Associated Retailer	5.98%	155,162
Everflow	Unassociated Retailer	5.58%	144,672
SES Business Water	Associated Retailer	1.51%	39,132
Clear Business Water	Unassociated Retailer	0.99%	25,624
First Business Water	Unassociated Retailer	0.38%	9,892
Smarta Water	Unassociated Retailer	0.28%	7,359
BT	Self-supply	0.26%	6,751
ADSM	Unassociated Retailer	0.23%	6,070
J Sainsbury	Self-supply	0.14%	3,566
Greene King	Self-supply	0.12%	3,114
ConservAqua Ltd	Unassociated Retailer	0.11%	2,774
Stonegate Pub Company	Self-supply	0.10%	2,485
Marstons	Self-supply	0.07%	1,830
Whitbread	Self-supply	0.07%	1,741
YÜ Water Limited	Unassociated Retailer	0.05%	1,225
The Water Retail Company	Unassociated Retailer	0.05%	1,186

Market	HHI	Date recorded
UK mortgage lenders market	983	Aug 22
UK electricity market	1300	May 23
UK gas market	1400	May 23
UK NHH water retail market	1736	Sep 23
UK broadband market	2202*	Apr 23
UK mobile market	2770*	Apr 22

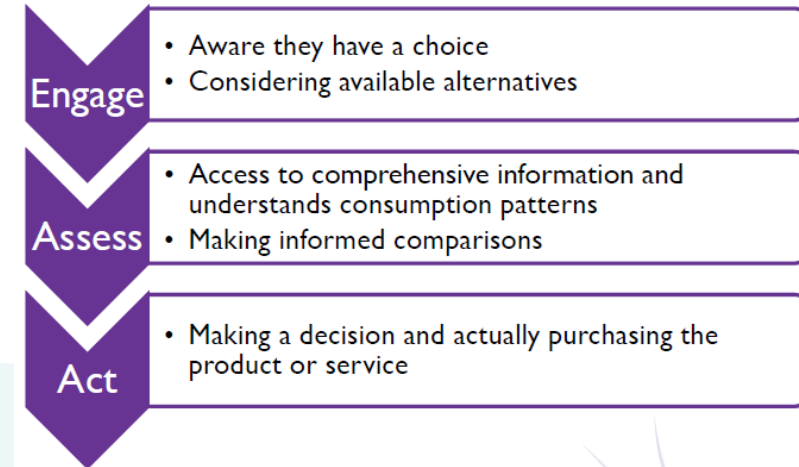
* indicates a highly concentrated market



Europe Economics

Market Comparison Report

Case study	Key regulatory reviews and rationale for inclusion in our study
Energy	A B2C and B2B market in which competition has been encouraged to benefit customers e.g. through Ofgem's Retail Market Review and the CMA's energy market investigation. Vertically integrated industry where competition and better customer outcomes depend both on wholesaler support for the market, as well as retailer activity in servicing customer needs. The role of third-party intermediaries in this market has attracted regulatory interest.
Mobile	Primarily a B2C market with challenges brought by both complexity of choice and complexity of process which Ofcom has sought to address through its strategic review of switching and subsequent Auto-Switch reforms. As above, the role of third-party intermediaries in this market has attracted regulatory interest.
Mortgages	A B2C market explored by the Financial Conduct Authority's (FCA) market study and subsequent work looking at why some mortgage consumers who could switch do not.
Card acquiring market	A B2B market, the PSR market study included remedies to facilitate more competition and better outcomes for SMEs following concerns that many SMEs are not fully engaged.
Solicitors	A B2C and B2B market where the CMA's market study on legal services prompted follow-on work by the Solicitors Regulation Authority (SRA) exploring how to improve how market functions for SMEs.
Retail banking	A B2C and B2B market where the CMA's retail banking market study looked at personal current accounts and services provided to SMEs leading to the introduction of open banking to make switching easier.



UK Regulatory Network – the customer journey

Developing Roadmap – What are the market outcomes?

Customer-Service Outcomes

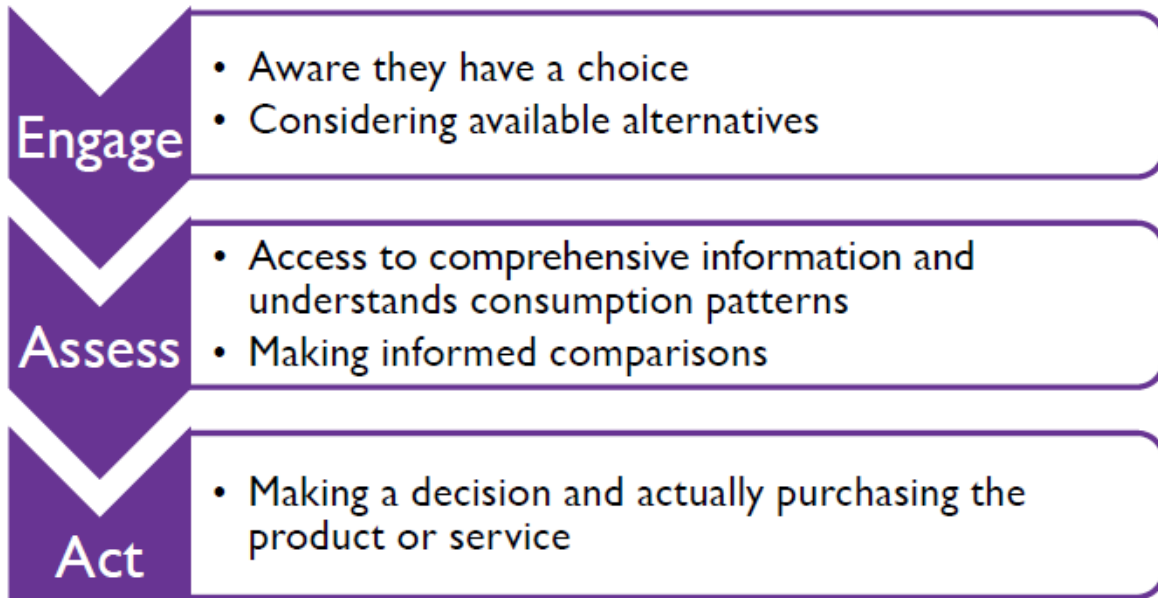
Good Environmental
Outcomes

Market Resilience

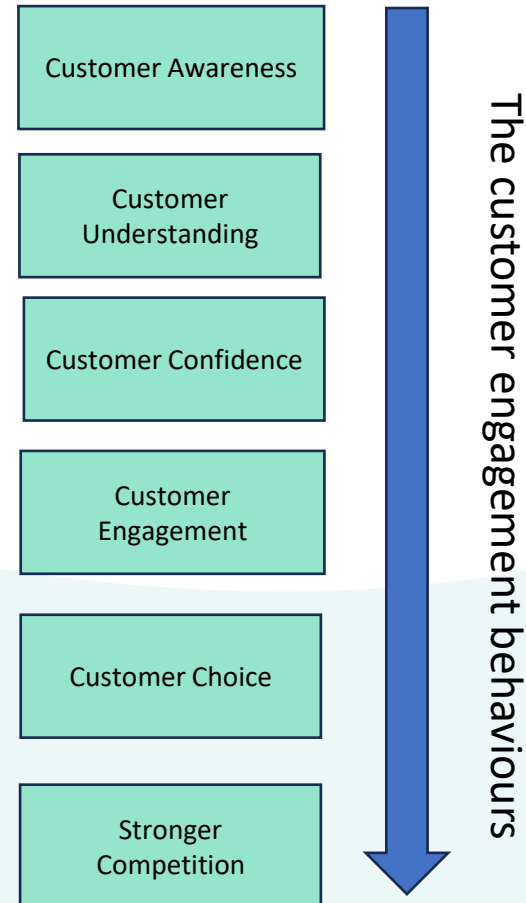
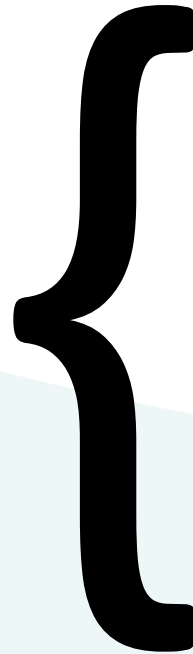
Developing Roadmap – What are the enablers?







Developing Roadmap – What are the Customer Behaviours?






UK Regulatory Network – the customer journey



Developing Roadmap – what are the Conditions?

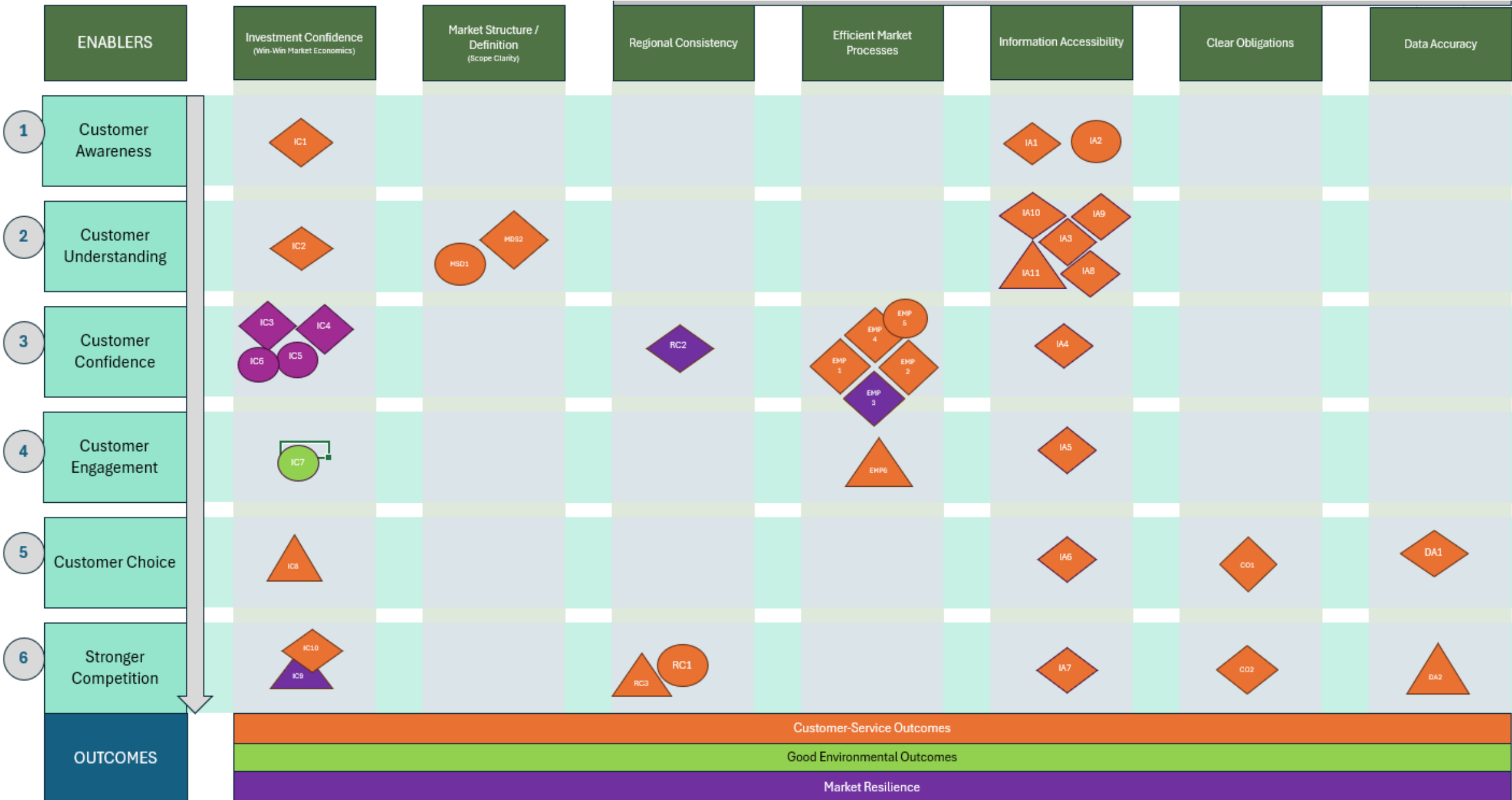
Market Condition	Requirement	Date	Behaviour	Enabler	Outcome
IC7 Customers are encouraged to invest in market infrastructure (e.g. smart metering technology) and solutions (e.g. attenuation tanks)	Align customer, Retailer and Wholesaler water efficiency incentives to enable collaboration and innovation to deliver 9% consumption reduction.	April 2025 	Customer Engagement 	Investment Confidence 	Good environmental outcomes 

Why?
 Customers should be aware of the overall requirement for water security and should be assured that their own investment in demand reduction measures will be supported by market participants e.g. loggers purchased and installed by customers on their meters will not be removed by wholesalers). Incentives from wholesalers to retailers should support this so that retailers do not perceive demand reduction solutions such as attenuation tanks as eroding their profits.

 Deliverable by April 2025
 Deliverable between 2025 and April 2030
 Deliverable after April 2030

Dependencies.
 RWG and Panel water efficiency roadmaps need to define how to route money into retailer incentives. This is also dependent on the customers being aware (national awareness campaign in IC1)

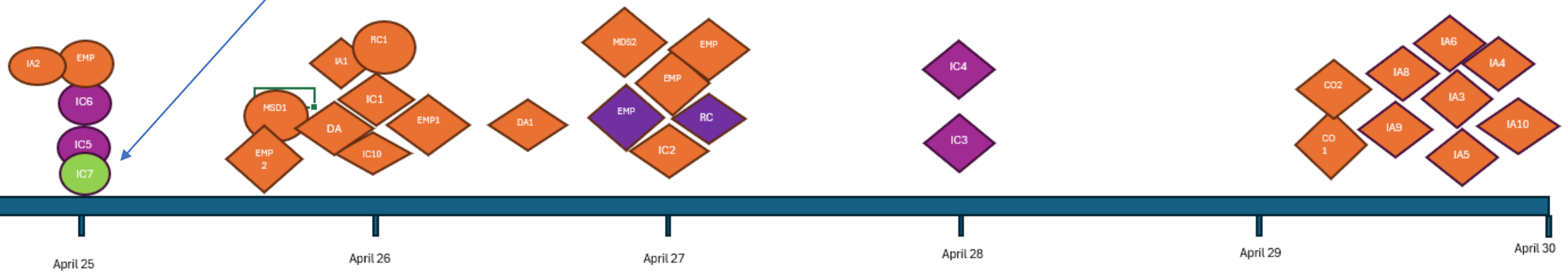
Mapping Conditions to Outcomes and Enablers



Mapping Conditions to a timeline

<p>IC7 Customers are encouraged to invest in market infrastructure (e.g. smart metering technology) and solutions (e.g. attenuation tanks)</p>	<p>Align customer, Retailer and Wholesaler water efficiency incentives to enable collaboration and innovation to deliver 9% consumption reduction.</p>	<p>April 2025</p>	<p>Customer Engagement</p>	<p>Investment Confidence</p>	<p>Good environmental outcomes</p>
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TIMELINE FOR MARKET CONDITIONS



Next Steps

- Meeting with UKWRC tomorrow
 - Sub-Group to review and revise conditions
 - Consultation
 - Roadmap
-

Debate



If I am a 3rd party working directly for a NHH Customer, how do I report a broken or leaking meter to the Water Company that owns it?

How will I know when it is fixed?

AOB & CLOSE

