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Smart Meter Installation Programme – Indicative Procurement Milestones

Activity	Timeline	
Formally launch tender	Q3	2023
Evaluate PQQ	Q3	
Evaluate ITT	Q4	
Bidder presentations	Q4	
Negotiations	Q1	2024
BAFO	Q1	
Contract Award	Q2	

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Smart Meter Installation Programme

Commercial Questions

What innovation/continuous improvement/benefits have you brought to this type of contract previously?

We have continuously brought innovation to improve the delivery of our Smart Metering service with Thames Water. Using our Salesforce system as the basis for all our processes, we have introduced Blicker, Where's My Tech, What 3 Words, Online Appointment Booking and Safe Dig AI – to name just a few examples, which are summarised below.

- **Blicker is a software tool that uses Artificial Intelligence (AI) to validate meter installations. Fully integrated with our Salesforce system, Blicker analyses the photographs of newly installed meters and reads the meter serial number and opening meter reading. The software then automatically checks these numbers against the data captured by our meter installers and provides a confidence match indicator. This ensures the right meter is installed for the right property and the starting meter reading is correct for billing.**
- **Where's My Tech helps customers to see when their technician is on route to their appointment. Similar to an Uber-style tracking interface, customers can plan their day around the technician's actual progress which minimises inconvenience for the customer and minimise failed appointments. Again, Where's My Tech is integral to our Salesforce solution.**
- **We incorporated What 3 Words location tool into our solution a couple of years ago to help our technicians and other operatives to efficiently find meter locations. What 3 Words is particularly useful in more rural areas, where addresses and postcodes can be larger.**
- **Initially, we used telephone, SMS and emails to book customer appointments. In 2021 we introduced our online appointment booking (OAB) tool which allows customers to select their preferred appointment slots directly in our system. The OAB portal can be accessed by scanning a QR code. This is quicker and more convenient for some customers and has reduced the volume of calls in our call centre; generating headcount and cost savings for Thames Water.**
- **Safe Dig AI is the latest generation solution to collate utility plans; which are required before every excavation. Safe Dig AI uses robotic process automation (RPA) and AI to build a pack which includes electric, gas, water, telecom and other drawings. The solution gives warnings of potential high risk pipes or cables in the vicinity of the planned work and serves up the drawings via a user-friendly interface on a mobile tablet. This solution has reduced costs, improved the on-site experience for our technicians, reduced the risk of damaging underground assets and, importantly, made our excavation activities safer.**

The examples above illustrate our drive to continuously improve the overall operation and service. There are very many more examples where we have used our in-house Business Services function to identify and develop new ideas to improve customer service, reduce cost and/or work more safely. We pro-actively share innovations across our company and indeed across M Group Services.

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What has been your experience of operating on a gainshare model whilst driving correct behaviours?

We have found that operating on a gainshare model encourages collaborative working between the Contractor and the Client to review options together, in an effort to minimise cost and maximise productivity whilst maintaining safe working practices and meeting the Client's targets.

We are a main contractor proficient in the management of contracts and frameworks and are able to transfer our high level of experience and knowledge of delivering NEC option C contracts throughout a wide geographical region. Examples of contracts where a gainshare model has been utilized are

- Caledonia Water Alliance (CWA) – MWS and AECOM JV: April 2015, 6-year framework agreement to March 2021, extended a further 6 years. Projects range from £250k - £90m. Value of £90m per annum.
- Thames Water Delivery Frameworks – MWS led with AECOM as design partners: April 2020, 5-year initial agreement to March 2025, plus option to extend for a further 5 years. Projects range from £50k to £70m. Value of £50m per annum.
- Yorkshire Water P4Y: Infrastructure Frameworks: April 2010 to March 2025. 5-year agreement with the potential to extend by 3 years to April 2028. Projects range from £50k - £15m. Value of £25m per annum.
- Southern Water Capital Infrastructure Framework – MWS and Galliford Try JV: April 2015 – March 2025. AMP6 value of £132 million and a forecast of £156 million for AMP

How do you retain your operatives in a competitive market?

MWS has detailed strategies and people plans for managing, developing and retaining our staff, including wellbeing, skills enhancement and job satisfaction. These plans are endorsed by our managing director and Group CEO.

Training and progression are tailored to the individual's capability and career aspirations. This has yielded noteworthy results in staff retention rates and interest from new joiners due to the company's reputation for training, which has spread throughout the industry community networks.

We reward hard working employees with bonuses, which also benefits our clients, as workforce incentives and high morale are proven to lead to increased productivity rates. This in turn lowers the cost per job as staff are incentivised to meet and outperform targets.

We also assess the competency and performance of our staff through annual PDRs where we identify development needs and opportunities, which are followed up through regular 1-2-1s. Emerging talent, personal development and succession planning is carried out using the 9- Box grid model where tomorrow's superstars are identified and nurtured.

We have a Women's Network dedicated to bringing greater gender parity to our business through three main goals; Increasing the female workforce to 25% by 2025, promoting a culture and environment for women and enabling women to perform at their best.

We have found these to be effective strategies for staff retention as our average length of service for staff is 5 years which is positive in our industry which has relatively high

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level of employee mobility compared to other employment markets **We are working to further reduce our current turnover with an aim of achieving a staff retention level of over 90%. To help achieve this, we conduct an annual people opinion survey, which is met with high levels of engagement from our workforce. We then develop and implement plans at corporate, divisional, contact and team level based on the feedback we receive. These plans relate to:** • **Improving our internal communications.** • **Increasing the visibility of senior leadership.** • **Implementing management and leadership development.** • **Talent strategies for our workforce.** • **Identifying and recruiting key staff.**
What is your strategy for market share of water Smart metering in the UK? How important is Portsmouth Water to you i.e., % market share of your overall portfolio and of your utility portfolio?
Focusing on clients in areas where we already have operational strength. SE, N & NE and Scotland. Portsmouth Water is an important customer and is part of our Southern UK strategy for Smart Metering. Building upon our contracts with Thames Water and Southern Water as a client the geographic position of Portsmouth Water allows us to expand our offering along the South coast and link our contracts more effectively with South West Water. We are currently talk with Sutton and East Surrey and plan to explore opportunities with Wessex Water to form a central hub to service the entire region. Portsmouth Water would make up around 25% of our existing and future plans building upon our smart metering contract for Thames Water where we have completed 1million smart meter installs.
How would you manage your resources if the deployment plan were to significantly change?
Look for PW to give us alternative workstreams to deploy our operatives on to. **We would always look to build a deployment plan which built appropriately and allowed for some level of change and pause to allow for factors outside our control. This plan would also include appropriate levels of direct and external resources which would further mitigate such change. However, should the change(s) be so significant that our contingency plans do not address them we would look to make use of resources on any project or workstream that is available (this might allow us to front load the programme in certain areas to offset a backload in others). We would endeavour to complete all surveys, perhaps assess internal installation assessments / planning, we could start the customer journey and invest in enhancing the communications at the start of the deployment. MWS are also in the position where we can temporarily move some resources to other contracts if needed.** **Have numerous metering frameworks running….***With Richard to add in some more detail*
How important are guaranteed volumes when considering this type of contract?

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Guaranteed volumes are important to ensure a smooth procurement process, plan the works and structure accordingly to make sure we have the correct number of staff offices and depots set up to be able to deliver. It is important to have a forecasted works shared between the client and contractor to allow us to effectively plan for the peaks and troughs in workload. If volumes were to decrease dramatically in the short term**,** then this would have then this would have a commercial impact.

We would appreciate if Portsmouth Water can provide the following information as a minimum:

A clear scope

- Clarity on volumes
- Clarity on customer journey
- Clarity on who will deliver each part of the end-to-end process.
- Penalty/reward in the contract T&Cs
- Clarity on any technology preferences

Further to the above, we have identified the following specific activities which Portsmouth Water could undertake to help ensure a successful procurement:

- Develop an early understanding of target deployment areas and sequencing
- Analyse trial and early work outcomes to understand lessons learned
- Develop an early understanding of your organisational readiness status/plans and intended operating model
- Decide upon what you want the desired customer journey to be, including what propositions are being developed to engage customer
- Develop an understanding of the 'right' amount of data you wish to get back from meters, as well as the appropriate frequency and required service level

In addition, PS may also want to consider that any increase in the amount of accurate customer contact information will support better access upon programme commencement, for example the collation of up-to-date mobile numbers to allow texting etc will support better access rates.

What contract length would you expect in this type of contract and what are the % price differentials?

We would prefer a longer contract period with price inflation mechanism built in. We would prefer this because it would require significant investment to begin the contract through recruitment of staff, developing processes and procedures to deliver effectively and providing the right level of customer engagement and support as part of the service.

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Having shared the proposed deployment plan what challenges, risks etc could you envisage? Suggestions for a more commercially/operationally viable deployment model? -

A potential risk is the possibility of a lack of available resources to meet PW's delivery programme. Upon our appointment to this contract, we would ensure that we engaged sufficient resources to fulfil the programme requirements, bringing new staff on board where necessary in order to avoid any delays in the programme.

In addition, we also foresee that a lack of availability of SMART meter stock may be an issue. Given volume of meters to install, it may be advisable to use more than one meter supplier to eliminate this as a risk. As an independent, we can provide multivendor support and supply management, as well as providing forecast reporting on the number of meters required to vendors up to 6 months in advance to allow smooth delivery and avoid disruptions to the meter installation programme.

Another possible risk we foresee is issues around the integration of our systems with yours. In order to alleviate this risk, we have developed our systems to be easily interfaced with any system, including all mainstream systems (MS, Oracle, SAP) as well as bespoke Client systems. Should we be selected to be part of this programme, we will undertake design as part of the mobilisation period to ensure that our systems' compatibility and standards are built in as part of the integration.

The final key risk we foresee on this programme is a potential lack of customer awareness of planned work. Early customer awareness is critical to the successful delivery of any SMART Metering programme. Upon award, MWS will ensure that customer journey scripts are in place immediately, allowing all customers to be kept well-informed of what we're doing long before we begin. As part of our Every Customer Counts philosophy, we always follow the below principles regarding customer communication:

- **Inform customers of our works in advance.**
- **Listen to a customer's problems and honestly answer any query they have.**
- **Clearly explain any paperwork a customer may have.**
- **Communicate with customers to confirm and appointments, make them aware that we are en-route and confirm the time of arrival via the customer's preferred contact method.**
- **Proactively communicate with affected customers and key stakeholders during service delivery, explaining what we are doing before, during and on completion of the works.**
- **Keep checking that the customer is happy with everything and signpost them to someone else if they need help or information we are unable to provide.**
- **Undertake multichannel communications, such as early written notices, personal visits, telephone calls, social media posts, letters and proactive outbound text messaging, using the communication that is appropriate for the individual customer's needs.**

What insurances would you expect to hold? (for loss or damage to equipment)

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On similar contracts our clients hold their own insurances for the works. Insurance costs below excess level of £10,000 are an allowable cost under the contract. **MWS standard insurances are available** **Employer's Liability: Indemnity Limit £10,000,000** **Primary Public/Products Liability: Indemnity Limit Public £10,000,000, Indemnity Limit Products £10,000,000 (any one occurrence)** **Professional Indemnity: Limit £15,000,000** **Contractor's All Risk: Indemnity Limit £15,000,000**
We are proposing to have our costs adjusted by CPIH. Would this cause any issues or would any other indexation be more appropriate and why?
Subject to adjudication and a cost review we are happy to use CPIH.

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Smart Meter Installation Programme

Logistics Questions
How would you normally operate a contract for managing meter assets?
We use a stock management system to keep a track of the meters and LCEs when they arrive with us. This then interfaces with our work management system to track the meters from being taken from the stores all the way to installation and becoming live on the network. We regularly interface with our clients regarding ordering, stock levels and asset management. **We provide all required data to ensure that the meter is fully livened on the client network and is transmitting data as expected. Should it not be working correctly we will revisit and resolve (if it appears a though the asset was failing we will return ir for checking – fully tracked)**
What audit/governance processes do you typically have for hygienic management/storage and handling of Reg 31 materials in your possession?
All our staff are Water Hygiene trained (EUSR accredited level) as well as being assessed by our client in Water Hygiene and Quality and our stores, vans and teams are regularly audited for Water Quality (as part of regular audits and also specific inspections). **Our vans are designed so that all Reg 31 materials are stored in secure areas away from any possible spills or contamination (potentially harmful materials are stored separately and in double-bunded containers). We also ensure that all unbagged fittings are capped at all times.** **Our stores are similar in that Reg 31 materials are stored away from anything potentially harmful, off the ground and in secure areas at all times.** **All our installations are done in full compliance with Water Quality guidelines and we monitor this by reviewing works photographs which have to demonstrate caps in pace, use of freshly made chlorus and storage of materials during the installation process (i.e. on a clean surface off the ground).**
How would you normally operate a contract for handling Reg 31 materials?
In order to handle Reg 31 materials we ensure that all aspects of the works, personnel, plant and tools, vehicles and stores are suitably compliant with all aspects of Reg 31, building in at least two points of failure into the processes to ensure that the materials cannot be compromised with regards hygiene and quality. **Our people are both trained in EUSR national Water Hygiene as well as local (often client based) Water Quality training (e.g. Thames Water Passport and e-learning courses) and our systems prevent them from being on live sites until they have this qualification. Our Works Management System will not allocate works to anyone who does not possess current versions of those qualifications (as monitored and enforced by the M Group Services Train With Us department – who sit outside the contract) and our site entry processes require anyone looking to enter our works sites to be able to prove they have these qualifications (via online training records). All staff and operatives on the Smart Metering**

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contract work exclusively on that contract and cannot do works in sewers or foul water. However, should our teams need to be multi-skilled we always ensure that they have different PPE< plant, tools and vehicles so that there can be cross contamination. Our people undergo Health Surveillance in accordance with their role and personal risk and compliance to this is monitored by Group to provide for surety. Our PPE is always intrinsically safe and thus can be washed repeatedly to be kept clean and hygienic and we supply enough PPE to allow for the operatives to have clean clothing when they work. As above we currently work exclusively (as is our general preference) in the clean water side, but if we did not we would have separate stores and storage (as well as tools, plant and vehicles) for water supply and other works. Our stores are designed with water quality and hygiene to the fore, ensuring that we are able to keep regulated materials clearly separate (in terms of bunded containers as well as height / distance) from both the ground and other materials. They are audited regularly (by operational staff, stores management and the client) to ensure quality standards are always met and we carry excess supplies of end caps to make sure that all unbagged fittings are always capped (in the stores or in transit to the works). Our plant is all checked daily or weekly (using our own bespoke version of the Asset Go application) and we keep records to track these checks as well as follow-up / rectification works as needed. These checks include safe use of plant, suitability and compliance to work in hand as well as hygiene and quality checks to confirm that any contaminants cannot affect regulated materials. However, our teams carry spill kits and 'plant nappies' to assist in the event of an issue. Should any materials be (or possibly have been) contaminated they are reported and disposed of as required. All our teams and operatives carry the ability to make chlorus disinfectant spray (at least every other day but target is daily) and their bottles are day marked to confirm this when being audited or inspected. When combined with the use of the clean surfaces the teams also carry this means that we can ensure that all meters and fittings that are placed into the network have been properly and fully decontaminated as per the Regulations
Are you able to bulk collect palleted meter assets from Portsmouth Water warehouse? Or would you suggest alternative approaches to this?
We are able to collect such assets however, we generally prefer receiving deliveries from the manufacturers as this allows full tracking and handover of all assets for our clients. **GRNs can be added directly into our system and compared with OEM delivery details providing assertion for all parties that all assets have been delivered and received.**
How do you track/reconcile stock collected from Portsmouth Water vs. stock installed?
Our stock management system interfaces with our work management / installation system allowing for a complete life history for each asset. This allows us to have regular checks to verify the location of all assets that have been given to us by our clients. We are then able to confirm where the assets are – at depot / store, currently in an engineers van, installed (and exactly where) or returned back to stores. We have a salesforce based system which monitors and tracks stock levels. Our Salesforce work management system allows us to scan meter barcodes, where available, to track the asset(s) received, in stock, installed or returned. Via the interface to our clients' asset management systems, we pass the meter information to ensure all assets are tracked

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How do you manage meter asset returns i.e., faulty, damaged?
As above we ‘reverse’ the asset through our work management and stock system. They can be ‘moved’ within the two systems from installed back to the stores (even to a specific area which can be segregated for returned assets). At all stages of this process photographs (analysed by our AI system to prevent human error) verify asset serial numbers, meter readings and locations.
How do you minimise waste through delivery of this type of contract and what is your approach to disposal of waste? (considering environmental impacts)
Track assets; Ensure every one can be located at all times; We return all waste to our stores and there remove them via approved waste carriers. Thus ensure all assets used and not wasted. General waste - Mitigate waste by not needing it in the first place; small excavations, reuse material wherever possible and permitted We recycle PPE Procure sustainably – less packaging, recycled etc

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Operational Questions

How have you worked collaboratively with other programme providers i.e., network providers, asset manufacturers?

We work in many collaborative arrangements with existing clients and framework partners where the success of the model and delivering to plan rely on collaboration, and actively collaborate with delivery teams, stakeholder management, asset planning, design and engineering and key statutory stakeholders. Many of our contracts are long-term, strategic service delivery arrangements that require extensive collaboration to achieve our clients' objectives. On these contracts, we develop a shared operational vision and culture with streamlined, integrated operational processes, common data environments (where appropriate) using collaborative tools such as SharePoint, MS Teams and Miro online whiteboard tool to help the teams deliver successful projects. We also chair, participate in, and attend key client forums and roadshows to collaborate with framework partners, clients, and the supply chain to share best practice, innovation and lessons learnt.

The flexible approach and journeys we built collaboratively with Thames Water have helped us build an integrated alliance. This resulted in an end-to-end strategy including programme and performance boards, change and continuous improvement programmes and strategic planning. In summary the benefits realised have been:

- **Development and implementation of a fully integrated, agile work management system, developed collaboratively with Thames Water; this advanced industry-leading metering system allows customers to book appointments on-line, schedule automation, work allocation to operations and the collation of accurate meter installation feedback (including photographs) via mobile and bar coding devices.**
- **Development of an integrated IT solution for the smart metering contract, the first of its kind to offer end-to-end automation throughout a job lifecycle.**
- **In the last three-years, our Optant metering programme score of 4.8 was achieved through collaboratively reviewing all customer satisfaction scores of 3 or lower to identify issues of concern, using insight to drive improvements in systems, training, efficiency and the customer journey.**

Even though we are not responsible for the AMI and meter provision in Thames Water (Arqiva and Sensus are), MWS always worked collaboratively with Thames Water to support decisions, understand asset and network failures and create business cases for TW go back to these partners. Nevertheless, within the MGroup Services, we have the capability to support the end-to-end service and scope for smart metering and associated activities, using the Energy Division (Morrison Data Services – Callisto) and Telecom Division (Magdalene, Waldon, Avonline and Morrison Telecom Services)

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To date, we have completed 800,000 meter installations and associated activities, including 600,000 smart meter installations and over 200,000 excavations. We haven't only been supporting Thames Water with the install targets but also repairing customer side leakage, install water saving devices and work with customers to reduce their consumption.
How would you manage ramp up and ramp down of resources to meet the deployment plan? – thinking on our part – bs reponse
MWS is confident in its ability to appropriately resource this programme and maintain the required level of experienced resources throughout its duration. We will combine our extensive water industry experience with robust and repeatable processes, actionable management information, strategic partnerships, and high-quality training to ensure improved and continued success. We appreciate the local market constraints regarding availability of appropriately skilled resources. Most of the required team are from our in-house pool, with specialist digital detection resource from our supply chain. We will commit to employing locally where possible and can deploy suitably skilled back-up resource from our wider national workforce if required. We can develop a specific resource strategy and 'supporting people' plan that combines strategic planning (ensuring consistency in key roles, succession planning and readiness to meet future requirements) with tactical measures (that will enable us to flex resources as needed to meet demands and potentially changing priorities). Our initiatives, coupled with our clear training pathways, will help ensure we are resourced throughout the entire contract.
What examples do you have of effective operational KPIs used successfully in metering install contracts?
Installation cycle times, average CSAT/C-MEx score, service strikes, RIDDOR, accident frequency rate (AFR)
Can you share any lessons learnt?
1. Having a system that's agile enough to adapt and develop into what you need. In the initial stages of the project there were errors with serial numbers, locations, - we eliminated these errors by implementing blicker that then recorded the serial numbers correctly. We implemented GPS coordinates so we could clarify against the location that the water company is giving us versus the location that we have fitted the meter and being able to compare where we've paired a meter and an LCE. 2. Having a clear and defined journey – we do this by way of an automated checklist that records what we've done, which now means we're confident that a meter feeds that property and that customer is going to be billed correctly. Each step in the journey is defined so we can ensure a successful installation for the customer every time. 3. Planning – on sporadic work options work where there are multiple locations at once or successive locations which are in different geographic locations we can still meet the requirements by having the system in place that allows us to geographically plan – driving efficiency. Sporadic work can be geographically planned, workforce can be combined to deal with peaks and troughs in demand. 4. Avoid delays in supply - we have a forecast tracker which looks at the annual total that we need to install and there is a projected forecast on a monthly install rate across all of our work streams.

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How do you assure standards are maintained and typically how do you supervise and monitor performance of installation work? (management ratios/ audit/ inspection?)
Compliance team within the contract (separate from operations team and reporting directly to the lead) check work being done live as well as post work reviews and audits (including self-defect reinstatement works). **AI checks installation details, meter details and readings, locations.** **Supervisors use video systems to allow for remote monitoring (review and check PWORAs and Permit To Digs).** **Enforce pre and post work photos and videos to check for compliance (including quality completion of work)** **Power Bi and other reporting daily of works quality** **Daily photo checking of all aspects of work** **Regular site visits and audits** **All operatives have completed a Licence to Operate and this is reviewed if cause, after new kit or technology introduced**
Do you operate to ISO standards?
ISO-9001 **ISO-14001** **ISO-27001** **ISO-45001** **ISO-22301**
How do you conduct pre-installation surveys and how do you typically complete these and when?
Usually conducted by specially trained surveyors. We try and complete these in a time suitable for the work – i.e. for a digging programme we would require these at least a month or two ahead of time to allow for a suitable time to develop the programme, apply for streetworks notices and permits etc. Internal installs will be done closer to the proposed installation date to allow for minimal change and to enhance the customer journey. **All these are completed by using the bespoke survey forms and tasks built within our special metering work management system. This links all aspects of the jobs together (survey, notice, installation, customer, residence, meter details etc.) to ensure that the survey is correct and provides the information required for the specific job.**

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IT/Systems Questions
Do you own and operate your own booking system? And how would you propose to deal with appointment booking (for internal installs)
MWS own and operate our own appointment booking system whereby appointments can be booked online or by phone via a call centre. We have recently introduced chat bots and whatsapp messaging to make booking appointments more accessible for the customer. The system also allows us to manage capacity and quota in the background as it is able to track and record missed appointments and then feed in to our internal reports. This is linked to Where's my tech and Vonage which is a phone system that allows us to trigger appointment reminders on whatsapp to try and reduce wasted time from attending appointments when the customer is not in. They system also provides a map of the location of the van and an hour timeslot for the appointment.
How have you interfaced with clients' internal systems (i.e. asset management systems, GIS)
MWS has extensive experience of interfacing with our clients' systems. Our Salesforce system makes integration easy, and we utilise Jitterbit middleware where necessary. Our most complex integration project to date involved 102 separate interfaces, as shown in the system architecture diagram below. We built this solution for E.On's Smart Meter installation programme.

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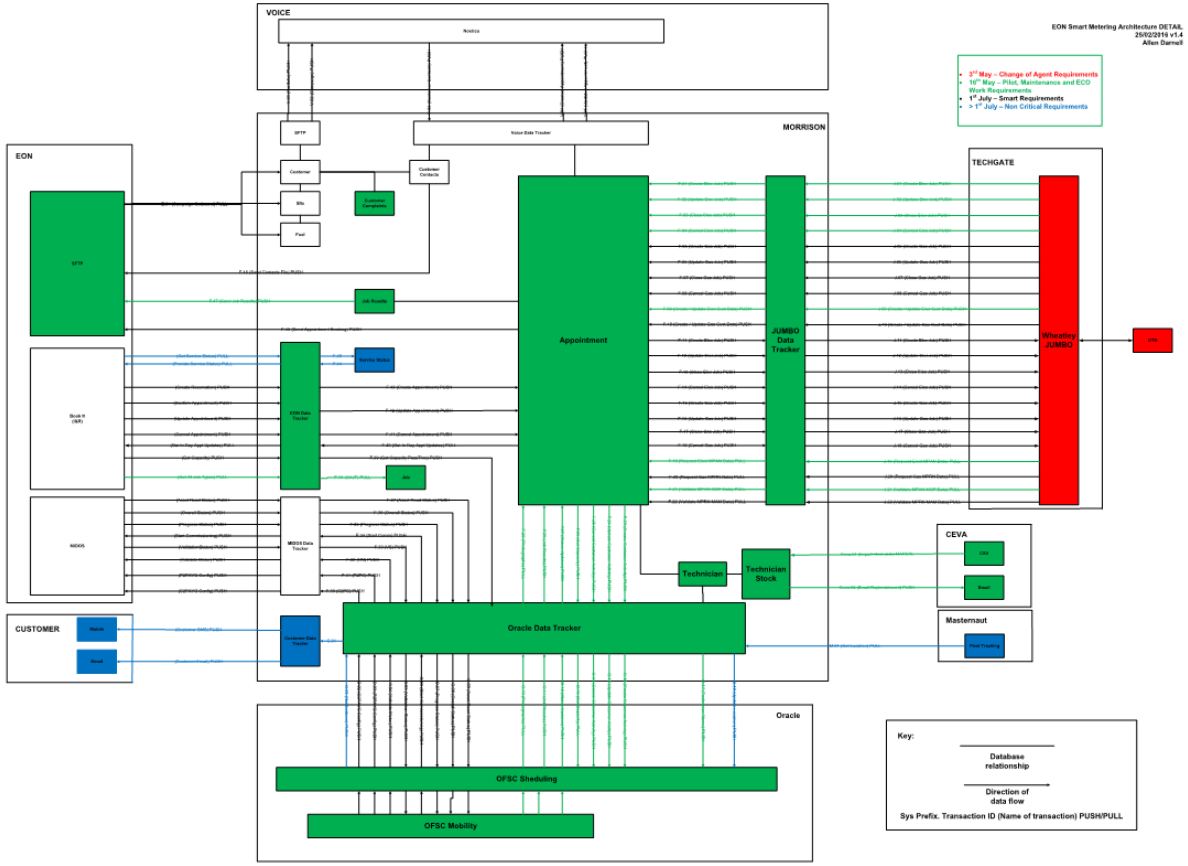

We often send data to and from our clients' systems; typically this includes job location data, work priorities, asset information and sometime customer details. We have good experience of using GIS systems. Some of our clients provide us with direct access to their GIS, in other cases we update SAP and/or ESRI for example with information about the work carried out.

We fully understand the importance of data and the risks of populating systems with poor quality data. With this in mind, our IT team would work closely with your technical experts to fully test all interfaces so they can be relied upon. In our experience, the development of interfaces has long-term benefits for all stakeholders; reducing manual activities and therefore cost, eliminating the risk of human error and eliminating the potential for backlogs to build.

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Portsmouth Water
excellence | respect | integrity

What security standards do you operate to (certifications/accreditations)?

MWS is covered by the following accreditations which are held by MGroup Services Ltd.

- **ISO 27001 certified with certificate number 10497512**
- **Cyber Essential certified with certificate number 988a21f6-dfc4-4736-9ff8-358f981d1662**

All networked staff (including subcontractors) are required to complete cyber security and business resilience training on our "LearnWithus" e-learning platform. The training covers our top ten security issues including sharing passwords/accounts, storing equipment safely (including vehicle storage), e-mail vigilance, lost equipment, use of USB sticks and external drives. Our objective is to create and maintain a cyber security culture across the business. Following security training we provide to each delegate our Acceptable Use Policy.

Data security training is also provided to heighten awareness of requirements to meet our company policy. The module covers holding company data on personal devices, moving data, sending data outside the MWS network, encrypting critical data and mimecast email encryption.

All Training data, compliance understanding percentages are available to MWS via a Power BI Report that is updated 24/7. This gives live data and is seen as best practice throughout the Utility Industry.

How do you ensure compliance with GDPR?

At Morrison Water Services (MWS), we have fully embraced the tenets of the General Data Protection Regulations (GDPR) and the Data Protection Act 2018. This can be evidenced in our policies and processes:

- **Our Data Protection Policy (MGS-POL-DP-001) details our commitment to transparency in the handling and management of personal data to ensure we meet our data protection obligations.**
- **We further manage procedures relating to data protection such as our MGS-PRO-DP-002 (DPIA Procedure) which gives step by step guidance on how staff should conduct a data risk assessment**
- **Our MGS-PRO-DP-001 (Data Protection Breach Procedure) illustrates the necessary activities required to be undertaken in managing a data protection breach where identified**

The Group requires that all employees who may collect or process Personal Data are aware of the obligations that both the Company and its employees are under when processing personal data.

A mandatory GDPR training module is available to staff via our e-learning platform, "LearnWithUs". This online course covers GDPR requirements and what is expected of our business and our people in terms of compliance. The course aims:

- **To explain the key aspects of data protection and its importance in the workplace.**

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- To understand what is classified as personal data, the principles of data protection, who is involved, the rights of the data subject, their role in data protection and how the Act is enforced.

Upon completion, staff can download a certificate for their records. Our internal "TrainWithUs" team manage and monitor completion of these modules.

Nick Scott, Group Information and Security Manager is responsible for Data Protection and Information Governance.

How are clients typically able to access records (data/photographs/pre-installation surveys) from installations?

We would suggest there are 2 main options for Portsmouth Water to access data from our metering installation activities:

a) Should the system architecture allow it, then we would typically build an interface to transfer photographs, measurements, meter serial numbers, readings and any other data from our Salesforce work management system to your system. The data in our system is virtually live, so site information can be seen in the office within a few seconds. Transfer of data via an interface could be scheduled daily, weekly or upon completion of job milestones.

b) We are also happy to provide Portsmouth Water direct read-only access to our Salesforce work management system, so meter installation activities can be viewed in real time. We currently provide hundreds of Thames Water employees with the ability to log into our Salesforce system, for example.

The options above could also be used jointly. i.e. direct visibility into Salesforce to check on specific customer activities, with scheduled system updates via the interface.