

NORTHUMBRIAN
WATER *living water*

ESSEX & SUFFOLK
WATER *living water*

YOUR WATER, YOUR SAY



NORTHUMBRIAN WATER LTD

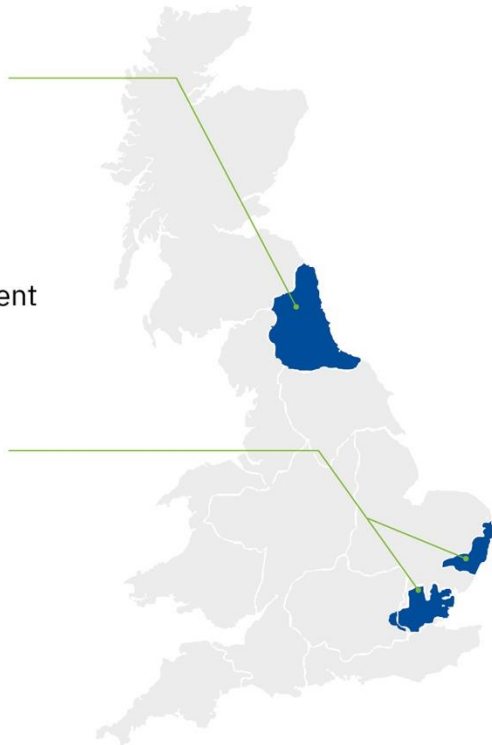


NORTHUMBRIAN WATER *living water*

- 2.7m customers
- Water production and distribution
- Sewerage and wastewater treatment

ESSEX & SUFFOLK WATER *living water*

- 1.8m customers
- Water production and distribution



WATER

- 44 impounding reservoirs
- 57 water treatment works
- 344 water pumping stations
- 338 water service reservoirs
- 25,545km water mains (16,000 miles)

SEWERAGE

- 418 sewage treatment works
- 765 sewage pumping stations
- 29,724km (18,000 miles)

PEOPLE

- 3,000+ employees

OUR PURPOSE IS

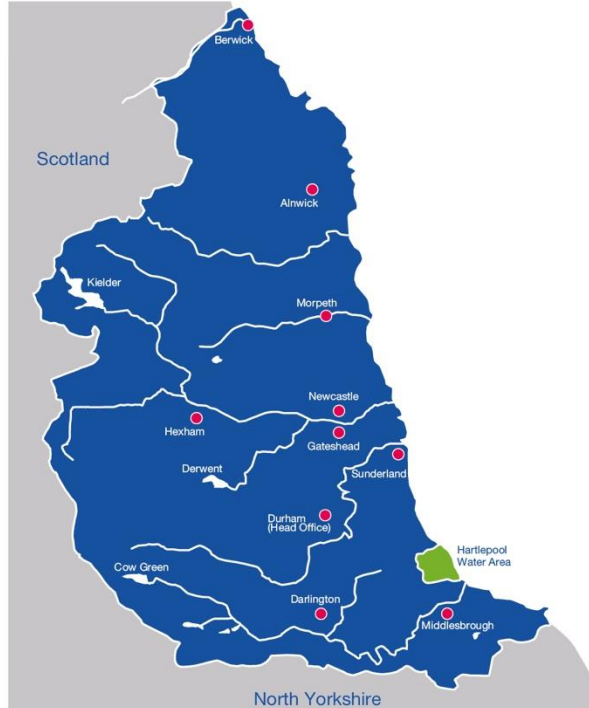


Caring for the essential needs of our communities and environment, now and for generations to come.

We do this by providing reliable and affordable water and wastewater services for our customers.

We make a positive difference by operating efficiently and investing prudently, to maintain a sustainable and resilient business.

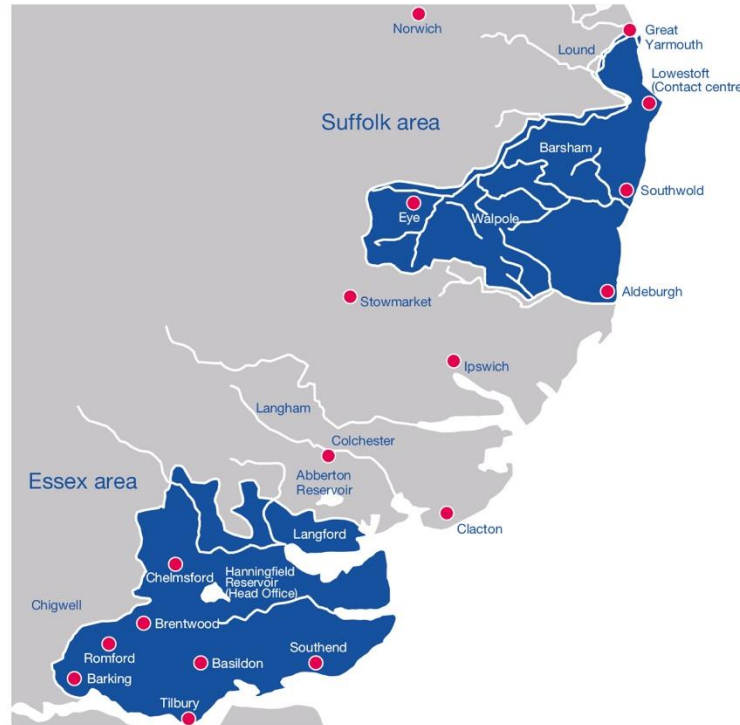
NORTHUMBRIAN WATER



ESSEX & SUFFOLK WATER



Abberton Reservoir, Essex



Hanningfield Reservoir, Suffolk

WHAT MATTERS MOST TO OUR CUSTOMERS AND STAKEHOLDERS



Good quality water



Environmental improvements



Work with partners



Maintain healthy assets



Keep bills affordable



Respond to change



OUR PLAN 2025-30



RELIABLE SERVICE AND UNRIVALLED CUSTOMER EXPERIENCE

- Investing **£350m** in new water supplies.
 - This includes an additional **£38m** on the largest ever leakage reduction programme, from an already industry lowest level in Essex and Suffolk.
 - **£188m** in more smart meters.
 - **£8m** to help drive down demand.
- Committing to some of the best service levels across the sector in line with our vision to be the 'national leading' water company.



CARING FOR THE ESSENTIAL NEEDS OF OUR ENVIRONMENT

- **£1.7bn** of investment in the environment (ten times as much as the last five years).
- A further **£480m** is needed to build resilience in our networks and treatment works, so that customers face lower risk of disrupted services in the future.
- Eradicating serious pollution events.
- Commitment to achieving net zero by 2027.
- Maintaining our excellent bathing water quality – clean rivers and beaches.



SUSTAINABILITY AND RESILIENCE

- Largest investment programme since privatisation - **£3bn**.
- This includes **£230m** investment in repairing and replacing our assets, as well as **£170m** in adapting to climate change.



AFFORDABLE AND INCLUSIVE SERVICES

- Supporting customers in water poverty - **no household** spends more than **5%** of their income on water bills.
- Inclusion, diversity and equity.

RELIABLE SERVICES



Our top priorities are:

- Making sure we have enough water in Essex and Suffolk.
- Improving drinking water quality.

How we will get there:

- Investing **£75m** on new pipelines so that we can move water around our network to areas which have less , providing a reliable supply of water in the future.
- Reducing customer demand for water and introducing compulsory metering in Essex and Suffolk.
- Using innovation to tackle leakage.
- Continued focus on improving drinking water quality, adding to our £150m investments, by tackling risks at water treatment works and lead pipe programme.

Cost to our customers - over five years (excluding inflation)

- £23 per customer for Northumbrian Water customers.
- £51 per customer for Essex & Suffolk Water customers.

Target Area	Proposed NW improved service level	Proposed NW performance compared to other companies	Proposed ESW improved service level	Proposed ESW performance compared to other companies
Water supply interruptions, without warning, for longer than 3 hours	4 minutes per customer	Top 25% of companies	4 minutes per customer	Top 25% of companies
Sewage flooding of properties - internal	1.16 sewer flooding instances per 10,000 properties	Top 25% of companies	n/a	n/a
Sewage flooding of properties - external	16.03 sewer flooding instances per 10,000 properties	Top 50% of companies	n/a	n/a
Water quality compliance index (CRI)	Zero	Best	Zero	Best
Customer service (C-MeX)	n/a	Maintain top two	n/a	Maintain top two
Reducing leaks	84.5 litres per property per day	Mid-table	61.6 litres per property per day	Top 25% of companies
The appearance, taste and smell of tap water	0.94 contacts per 1,000 customers	Top 50% of companies	0.94 contacts per 1,000 customers	Top 50% of companies

CARING FOR THE ESSENTIAL NEEDS OF OUR ENVIRONMENT



Our top priorities are:

- 75% of our rivers will achieve good ecological status by 2050.

How we will get there:

- A targeted programme of £1bn investment in the most environmentally significant locations.
- Innovative catchment partnerships, leading to regenerative and nature-based solutions.
- Working in partnership with others – customers as citizens.
- Innovative new technologies such as smart networks.

Target Area	Proposed NW improved service level	Proposed NW performance compared to other companies
Storm overflows	16.61 average spills	Unknown
Bathing waters	87.56% (Ofwat score, 100% = all excellent)	Mid-table
Pollution of rivers and bathing waters	13.65 pollution incidents per 10,000km of sewers	Top 25% of companies

Cost to our customers - over five years (excluding inflation)

- £73 per customer for Northumbrian Water customers.
- £4 per customer for Essex & Suffolk Water customers.

SUSTAINABILITY AND RESILIENCE



Our top priorities are:

- Maintain supplies better in extreme weather.
- Maintain and improve on our performance in the long run.

How we will get there:

- Protecting our network from power failures and flooding by adapting for climate change.
- We will repair and replace ageing assets.

Cost to our customers - over five years (excluding inflation)

- £5.50 per customer for Northumbrian Water customers.
- £2.50 per customer for Essex & Suffolk Water customers.



AFFORDABLE AND INCLUSIVE SERVICES

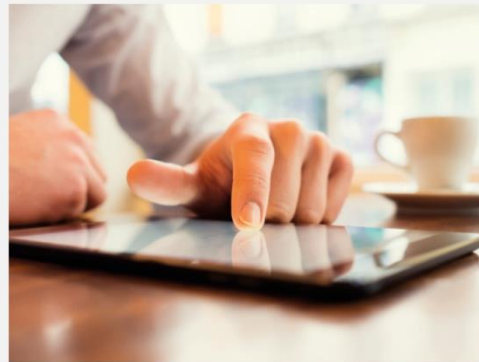


Our top priorities are:

- Making bills affordable for all.
- Zero water poverty in our operating areas by 2030.

How we will get there:

- We will offer a social tariff for customers who spend more than 5% of their income on water bills.
(Currently, over 106,000 customers are now benefitting from capped or reduced bills, which is an increase of 84,000 since 2019 when our zero-water poverty goal was set.)
- Work in partnership with National Energy Action, StepChange and others.
- Promote metering and water efficiency tips and introduce innovative tariffs that help customers save money, such as reducing standing charges to allow customers to reduce their bills when they are using less water.
- Understand customer needs and diverse circumstances.



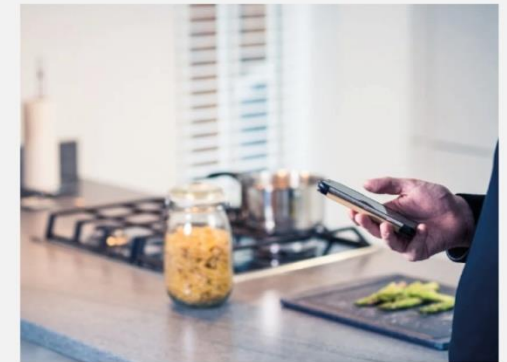
Flexible payment plan

Set up a payment plan with payments you can afford. You can also choose when to pay



Low income discount

If your household income is less than £17,005, or you receive Pension Credit? You can receive up to 50% off your bill



Reduced bill

If you don't have enough money coming in to cover your most important bills, we may be able to lower your payments by up to 50%

CUSTOMER BILLS



Northumbrian Water customer bill impact (excluding inflation)



Essex & Suffolk Water customer bill impact (excluding inflation)



Average 2022/23 water industry combined water and sewerage bill: £417*

Average 2022/23 water industry water only bill: £199*

	Statutory investment?	Additional cost for customers
Metering, water efficiency and leakage	✓	£15.83
Storm overflows	✓	£20.92
Improvements to asset health	✓	£6.24
Investment in regional flooding	✗	£2.28
Resilience – climate change adaptation	✗	£5.63
Storm overflows (additional)	✗	£12.41

	Statutory investment?	Additional cost for customers
Metering, water efficiency and leakage	✓	£19.44
Securing water supplies	✓	£22.26
Improvements to asset health	✓	£5.48
Resilience – climate change adaptation	✗	£4.59

We will support all of our customers by:

- Helping with bills – innovative tariffs.
- Providing a reliable service and support to all customers.

*Source: Discover Water

OVERVIEW



What we will do

- Make sure there is enough water for generations to come.
- Major improvements to our local environment.
- Invest in services.
- Help our customers facing bill increases.
- Innovate and work in partnership to find the most effective and efficient solutions.

Northumbrian Water customer bill impact (excluding inflation)



Essex & Suffolk Water customer bill impact (excluding inflation)



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THANK YOU

