

**MEETING:** Executive Leadership Team  
**AGENDA ITEM:** 6  
**ELT ACTION REQUIRED:** For information

**DATE:** 22 November 2017  
**OWNER:** [REDACTED]  
**PRESENTATION:** Yes

**SUBJECT:** Wholesale and Market Update

**LINK TO CORPORATE THEMES/GOALS:** Customer, Competitiveness, Focus

**EXECUTIVE SUMMARY:**

After extensive preparation by the Industry, the NHH Retail Water Market opened on 1 April 2017. This presentation is an update on the key issues or themes that have emerged over the first six months of live operation; both from a general market perspective and more specifically from a NWL Wholesale view.

I will recap on the Market Performance Standards Framework and provide an update on the latest position and thinking within the market on this aspect prior to the introduction of performance charging in April 2018.

The presentation will provide an overview on draft reporting formats and KPIs.

**RECOMMENDATION:**

The Executive Leadership Team is asked to note the Wholesale & Market Update.

**RISKS AND OPPORTUNITIES**

	<b>Probability</b>	<b>Impact</b>
Quality of data for some measures across the Industry is patchy and reporting techniques will need to be improved/automated.	Medium	Low
NWL's operating performance incurs performance charges from April 2018.	Low	Medium

**MEETING:** Executive Leadership Team  
**AGENDA ITEM:** 7  
**ELT ACTION REQUIRED:** For information

**DATE:** 13 March 2018  
**OWNER:** [REDACTED]  
**PRESENTATION:** Yes

**SUBJECT:** Wholesale and Market Update

**LINK TO CORPORATE THEMES/GOALS:** Customer, Competitiveness, Focus

**EXECUTIVE SUMMARY:**

After ten months of operating experience within the NHH Retail Water Market I will provide an update on our experiences to date and elaborate on a number of the key issues that have emerged in the market. I will cover general market issues and those more specific to NWL.

I will comment on the headline results of our recent Wholesale Non Household Customer Survey Work; a survey designed to gain insight into our NHH Customers views on us as a Wholesaler and some broader insight into their knowledge and understanding of the new Retail Water Market.

I will provide an update on the Market Performance Standards Framework and provide an update on the latest position and thinking within the market on this aspect prior to the introduction of performance charging in April 2018. The presentation will include an update on NWL's current performance.

**RECOMMENDATION:**

The Executive Leadership Team is asked to note the Wholesale & Market Update.

**RISKS AND OPPORTUNITIES**

	<b>Probability</b>	<b>Impact</b>
Quality of data for some measures across the Industry is patchy and reporting techniques will need to be improved/ automated.	Medium	Low
NWL's operating performance incurs performance charges from April 2018.	Low	Medium

**MEETING:** Executive Leadership Team  
**AGENDA ITEM:** 2  
**ELT ACTION REQUIRED:** For information

**DATE:** 19 June 2018  
**OWNER:** [REDACTED]  
**PRESENTATION:** Yes

**SUBJECT:** Wholesale and Market Update

**LINK TO CORPORATE THEMES/GOALS:** Customer, Competitiveness, Focus

**EXECUTIVE SUMMARY:**

I will provide a brief summary of our first year's MPS and OPS performance and a look at our first two months OPS & MPS performance since the "go live" of the new performance regime.

I will comment on the headline results of our recent Retailer Satisfaction Survey Work; a survey designed to gain insight into our Retailers views on us as a Wholesaler and what areas we could improve our service to them.

I will give a brief update on our ongoing actions in respect of some key market issues.

**RECOMMENDATION:**

The Executive Leadership Team is asked to note the Wholesale and Market Update.

**RISKS AND OPPORTUNITIES**

	<b>Probability</b>	<b>Impact</b>
Quality of data for some measures across the Industry is patchy and reporting techniques will need to be improved/automated.	Medium	Low
NWL's operating performance incurs significant performance charges from April 2018.	Low	Medium

**MEETING:** Executive Leadership Team  
**AGENDA ITEM:**  
**ELT ACTION REQUIRED:** For information

**DATE:** 11 September 2018  
**OWNER:** [REDACTED]  
**PRESENTATION:** Yes

**SUBJECT:** Wholesale and Market Update

**LINK TO CORPORATE THEMES/GOALS:** Customer, Competitiveness, Focus

**EXECUTIVE SUMMARY:**

**RECOMMENDATION:**

The Executive Leadership Team is asked to note the Wholesale and Market Update.

**RISKS AND OPPORTUNITIES**

	<b>Probability</b>	<b>Impact</b>
Quality of data for some measures across the Industry is patchy and reporting techniques will need to be improved/automated.	Medium	Low
NWL's operating performance incurs significant performance charges from April 2018.	Low	Medium

**MEETING:** Executive Leadership Team  
**AGENDA ITEM:** 8  
**ELT ACTION REQUIRED:** For information

**DATE:** 5 February 2019  
**OWNER:** [REDACTED]  
**PRESENTATION:** Yes

**SUBJECT:** Wholesale and Market Update

**LINK TO CORPORATE THEMES/GOALS:** Customer, Competitiveness, Focus

**EXECUTIVE SUMMARY:**

I will provide an update on significant market events and actions.

I will provide headlines from our most Recent NHH Customer Survey

I will provide an update on general market activity and NWL's performance year to date.

I will give a brief update on our ongoing actions in respect of some key market issues/themes and discuss some NWL specific issues.

**RECOMMENDATION:**

The Executive Leadership Team is asked to note the Wholesale and Market Update.

**RISKS AND OPPORTUNITIES**

	<b>Probability</b>	<b>Impact</b>
Quality of data for some measures across the Industry is patchy and reporting techniques will need to be improved/automated.	Medium	Low
NWL's operating performance incurs significant performance charges from April 2018.	Low	Medium
Retailer management of Premise Vacancy Status is not to an acceptable standard resulting in lost or delayed wholesale revenues.	Medium	Medium

**MEETING:** Executive Leadership Team  
**AGENDA ITEM:** 5  
**ELT ACTION REQUIRED:** For information

**DATE:** 9 September 2019  
**OWNER:** [REDACTED]  
**PRESENTATION:** Yes

**SUBJECT:** Wholesale and Market Update

**LINK TO CORPORATE THEMES/GOALS:** Customer, Competitiveness, Focus

**EXECUTIVE SUMMARY:**

I will provide an update on market activity.

I will provide an update on general market activity and NWL's performance 2018/19 and year to date.

I will give a brief update on our ongoing actions in respect of some key market issues/themes and discuss some NWL specific issues – notably vacant premises.

I will give a brief update on thoughts to "Support Competitive Markets" – Ofwat response due end of Oct 2019.

**RECOMMENDATION:**

The Executive Leadership Team is asked to note the Wholesale and Market Update.

**RISKS AND OPPORTUNITIES**

	<b>Probability</b>	<b>Impact</b>
Quality of data for some measures across the Industry is patchy and reporting techniques will need to be improved/automated.	Medium	Low
NWL's operating performance incurs performance charges from April 2018.	Medium	Medium
Retailer management of Premise Vacancy Status is not to an acceptable standard resulting in lost or delayed wholesale revenues.	High	Medium